

# EUROSTAT (2019.07.04)

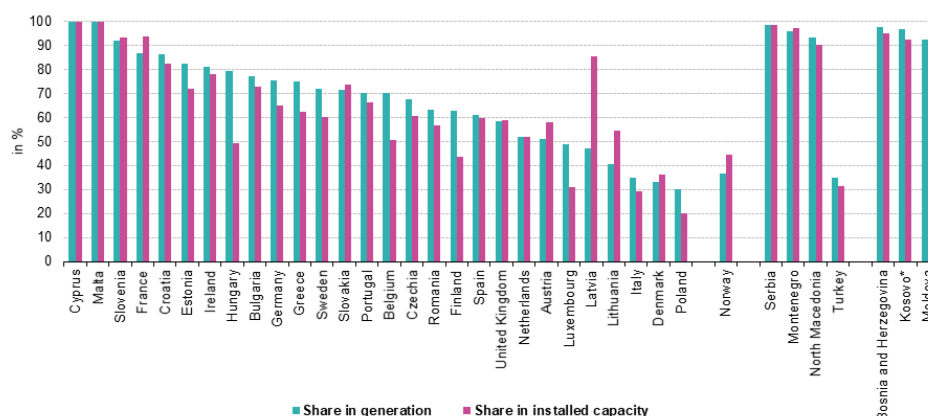
## Electricity market indicators

Data extracted in June 2019.  
Planned article update: June 2020.

### Highlights

The market share of the largest generator in the electricity market in 2017 was 100 % in Cyprus and above 80 % in Estonia (83 %) and Croatia (86 %).

Cumulative market share of the main electricity generating companies and their respective installed capacity share, 2017 (in %)



(\*) This designation is without prejudice to positions on status, and is in line with UNSCR 1244/1999 and the ICJ Opinion on the Kosovo Declaration of Independence. Note: companies are considered as "main" if they produce at least 5% of the national net electricity generation.

Source: Eurostat (This data is not yet available in the Eurostat dissemination database)



Cumulative market share of the main electricity generating companies and their respective installed capacity share, 2017 (in %)

This article takes a look at electricity markets in the [European Union \(EU\)](#), presenting recent statistical data on the number of [electricity generating](#) and retailing companies across EU Member States and Norway, North Macedonia, Montenegro, Serbia, Bosnia and Herzegovina, Turkey, Kosovo<sup>[1]</sup> and Moldova.

During the period 2003-2017, the number of main (main = market coverage above 5 % of national electricity generation) electricity generating companies in the European Union fluctuated between 82 and 90 companies, without a clear up- or downward trend.

Full article

Electricity markets - generation and installed capacity

## Electricity markets - generation and installed capacity

The information in Table 1 refers to the number of companies that generate electricity representing at least 95 % of net electricity generation at national level.

In 2017, the number of electricity generating companies representing at least 95 % of national net electricity generation remained limited to five or fewer in four EU [Member States](#). Germany did not report a number for this indicator.

Between 2016 and 2017, the number of electricity generating companies representing at least 95 % of national net electricity generation remained stable in nine EU Member States and increases could be observed in 11 Member States, while the number went down most significantly in Italy.

**Number of generating companies representing at least 95% of the national net electricity generation, 2003-2017**

	2003	2010	2017
Belgium	2	4	>310
Bulgaria	13	22	113
Czechia	20	24	230
Denmark	>1 000	>1 000	~1300
Germany	> 450	>450	.
Estonia	2	6	9
Ireland	5	8	9
Greece	1	4	3
Spain	.	.	>10
France	4	>5	>5
Croatia	2	2	12
Italy	79	185	688
Cyprus	1	1	1
Latvia	5	11	96
Lithuania	5	9	25
Luxembourg	9	3	>10
Hungary	30	68	30
Malta	1	1	3
Netherlands	≈87	700	350
Austria	34	126	240
Poland	31	68	211
Portugal	36	107	48
Romania	11	10	32
Slovenia	3	3	3
Slovakia	6	8	22
Finland	25	29	38
Sweden	7	24	33
United Kingdom	22	19	23
Norway	161	184	196
Montenegro	.	.	1
North Macedonia	.	1	3
Serbia	.	.	1
Turkey	148	60	246
Bosnia and Herzegovina	.	.	3
Kosovo*	.	.	1
Moldova	.	.	4

.: data not available

(\*) This designation is without prejudice to positions on status, and is in line with UNSCR 1244/1999 and the ICJ Opinion on the Kosovo Declaration of Independence.

Detailed table (2003-2017) available in 'Source data for tables and graphs'

Source: Eurostat (This data is not yet available in the Eurostat dissemination database)

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Table 1: Number of generating companies representing at least 95% of national generation 2003-2017

Table 2 displays the number of main companies that have a market coverage for at least 5 % of the total national net electricity generation.

Number of main electricity generating companies, 2003-2017

	2003	2010	2017
<b>EU-28</b>	<b>89</b>	<b>90</b>	<b>83</b>
Belgium	2	3	2
Bulgaria	5	5	5
Czechia	1	1	2
Denmark	2	2	1
Germany	4	4	5
Estonia	2	1	1
Ireland	3	6	4
Greece	1	1	3
Spain	5	4	4
France	1	1	2
Croatia	2	2	1
Italy	4	5	3
Cyprus	1	1	1
Latvia	1	1	1
Lithuania	2	5	4
Luxembourg	1	2	4
Hungary	6	3	4
Malta	1	1	3
Netherlands	4	5	4
Austria	7	4	4
Poland	7	5	3
Portugal	3	2	5
Romania	7	6	3
Slovenia	3	2	2
Slovakia	1	1	1
Finland	4	4	4
Sweden	3	5	3
United Kingdom	6	8	4
Norway	6	3	2
Montenegro	.	.	1
North Macedonia	.	1	2
Serbia	.	.	1
Turkey	3	2	3
Bosnia and Herzegovina	.	.	1
Kosovo*	.	.	1
Moldova	.	.	3

.: data not available

(\*) This designation is without prejudice to positions on status, and is in line with UNSCR 1244/1999 and the ICJ Opinion on the Kosovo Declaration of Independence.

Note: companies are considered as "main" if they produce at least 5% of the national net electricity generation.

Detailed table (2003-2017) available in 'Source data for tables and graphs'

Source: Eurostat (This data is not yet available in the Eurostat dissemination database)

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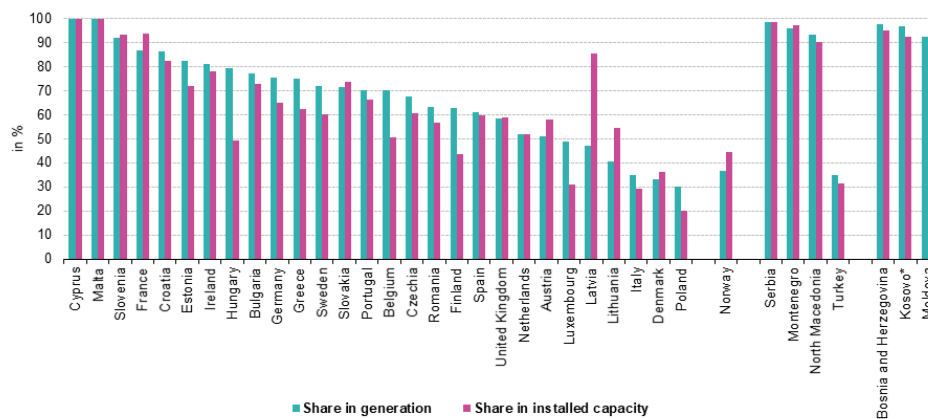
Table 2: Number of main electricity generating companies, 2003-2017

Six EU Member States declared only one single enterprise to have a significant share of electricity generation at national level in 2017. This is one more country compared to 2016. In Portugal, Germany and Bulgaria there are five electricity generating companies of considerable importance.

The number of main enterprises at [EU-28](#) level fluctuated between 82 and 90 companies between 2003 and 2017.

Figure 1 displays the cumulated shares of companies in a given country having a share of at least 5 % of their respective national markets, both with regard to the electricity actually generated in 2017 and the installed capacity of the generating power plants.

Cumulative market share of the main electricity generating companies and their respective installed capacity share, 2017 (in %)



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Source: Eurostat (This data is not yet available in the Eurostat dissemination database)



Figure 1: Cumulative market share of the main electricity generating companies and their respective installed capacity share, 2017 (in %)

Table 3 displays the market share of the largest generator in the electricity market in 2017 in percentage of national production. Cyprus reports a monopoly situation where one single company is responsible for the totality of electricity generation, and thus the installed capacity. Apart from Cyprus, where only one electricity company dominates the national production, figures above 80 % for the largest electricity generators are observed in Estonia (83 %) and Croatia (86 %).

A size of the largest generation company on national level below 20 % can be observed in Italy (19 %), in Luxembourg (18 %), in Poland (18 %) and in Lithuania (14 %). The market share of the largest generator for Bulgaria, Austria, United Kingdom and the Netherlands were not reported.

Market share of the largest generator in the electricity market, 2003-2017 (in %)

	2003	2010	2017
Belgium	92.0	79.1	60.7
Bulgaria	c	c	.
Czechia	73.2	73.0	62.2
Denmark	41.0	46.0	33.3
Germany	32.0	28.4	32.2
Estonia	93.0	89.0	82.5
Ireland	85.0	34.0	43.0
Greece	100.0	85.1	58.7
Spain	39.1	24.0	22.5
France	89.5	86.5	79.9
Croatia	82.0	88.0	86.1
Italy	46.3	28.0	19.0
Cyprus	100.0	100.0	100.0
Latvia	91.0	88.0	47.1
Lithuania	79.7	35.4	14.2
Luxembourg	80.9	85.4	17.8
Hungary	32.3	42.1	51.3
Malta	100.0	100.0	61.0
Netherlands	c	c	c
Austria	.	.	.
Poland	19.2	17.4	17.7
Portugal	61.5	47.2	39.5
Romania	.	33.6	23.1
Slovenia	50.3	56.3	48.5
Slovakia	83.6	80.9	71.4
Finland	27.0	26.6	25.6
Sweden	46.0	42.0	42.4
United Kingdom	21.6	21.0	c
Norway	30.7	29.8	30.6
Montenegro	.	.	96.0
North Macedonia	.	.	78.0
Serbia	.	.	98.6
Turkey	45.0	c	c
Bosnia and Herzegovina	.	.	46.3
Kosovo*	.	.	96.6
Moldova	.	.	79.8

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c confidential data

(\*) This designation is without prejudice to positions on status, and is in line with UNSCR 1244/1999 and the ICJ Opinion on the Kosovo Declaration of Independence.

Note: due to statistical confidentiality, some countries do not provide individual market shares for individual electricity generators.

Detailed table (1999-2017) available in 'Source data for tables and graphs'

Source: Eurostat (online data code: nrg\_ind\_331a)

eurostat 



Table 3: Market share of the largest generator in the electricity market, 2003-2017 (%).png

Source: Eurostat ([nrg\\_ind\\_331a](#))

Member States also provided information on new installed electricity generation capacity during 2017. From Table 4, it can be concluded that the new installed capacity decreased compared with 2016 from 27.8 to 25.7 Gigawatt. This decrease is mainly due to significant changes (in absolute terms) in the United Kingdom, Portugal, the Netherlands and Sweden.

### New capacity connected during the year, 2007-2017 (in MW)

	2007	2012	2017
<b>EU-28</b>	<b>25 018.0</b>	<b>39 522.3</b>	<b>25 696.9</b>
Belgium	154.0	1 010.0	1 177.0
Bulgaria	3.0	1 022.0	7.6
Czechia	.	.	.
Denmark	132.0	250.0	505.0
Germany	5 900.0	13 400.0	8 460.0
Estonia	27.0	87.0	40.0
Ireland	472.0	80.0	220.3
Greece	109.0	433.0	0.0
Spain	8 766.0	3 080.0	93.5
France	228.0	.	.
Croatia	.	58.0	122.6
Italy	4 657.0	6 091.0	1 090.0
Cyprus	.	.	0.0
Latvia	5.0	81.0	14.4
Lithuania	26.0	554.0	22.0
Luxembourg	1.0	49.0	17.4
Hungary	154.0	0.0	0.0
Malta	.	0.0	210.0
Netherlands	1 245.0	2 553.0	852.0
Austria	381.0	545.0	381.0
Poland	226.0	1 003.3	2 173.0
Portugal	633.0	555.0	357.0
Romania	727.0	1 935.0	13.8
Slovenia	10.0	173.0	18.0
Slovakia	25.0	77.0	4.2
Finland	184.0	418.0	1 100.0
Sweden	443.0	1 055.0	437.0
United Kingdom	510.0	5 013.0	8 381.2
Norway	1 045.0	.	.
Montenegro	.	.	75.3
North Macedonia	.	40.6	11.6
Serbia	.	.	12.0
Turkey	693.0	3 442.4	3 950.1
Bosnia and Herzegovina	.	.	32.9
Kosovo*	.	.	2.1
Moldova	.	.	9.9

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e estimate

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Detailed table (2007-2017) available in 'Source data for tables and graphs'

Source: Eurostat (This data is not yet available in the Eurostat dissemination database)

eurostat 



Table 4: New capacity connected during the year, 2007-2017 (in MW)

## Electricity markets - retail

EU Member States (and Norway, North Macedonia, Montenegro, Bosnia and Herzegovina, Serbia, Turkey, Kosovo and Moldova) also reported information concerning the retailing (sales) sector.

Table 5 presents information on the total number of retailers that sell electricity to final customers.

When looking at the number of main retailers (retailers are considered as "main" if they sell at least 5 % of the total national electricity consumption), 2017 shows a big increase. It went from 102 retailers in 2016 to 112 in 2017.

Total number of electricity retailers to final consumers, 2003-2017

	2003	2010	2017
Belgium	45	37	60
Bulgaria	8	36	57
Czechia	365	324	399
Denmark	113	33	39
Germany	940	>1 000	1404
Estonia	42	41	46
Ireland	6	8	12
Greece	5	11	19
Spain(*)	375	202	291
France	166	177	185
Croatia	1	3	9
Italy	390	268	638
Cyprus	1	1	1
Latvia	1	4	26
Lithuania	8	15	22
Luxembourg	11	11	10
Hungary	12	38	42
Malta	1	1	1
Netherlands	42	36	48
Austria	160	129	171
Poland	175	146	190
Portugal	5	10	27
Romania	8	56	105
Slovenia	8	16	21
Slovakia	18	77	71
Finland	>100	>100	~100
Sweden	127	134	171
United Kingdom	24	22	47
Norway	223	184	197
Montenegro	.	.	5
North Macedonia	1	3	19
Serbia	.	.	19
Turkey	5	466	216
Bosnia and Herzegovina	.	.	26
Kosovo*	.	.	3
Moldova	.	.	4

.: data not available

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Detailed table (2003-2017) available in 'Source data for tables and graphs'

Source: Eurostat (This data is not yet available in the Eurostat dissemination database)



Table 5: Total number of electricity retailers to final consumers, 2003-2017



Number of main electricity retailers, 2003-2017

	2003	2010	2017
<b>EU-28</b>	<b>96</b>	<b>98</b>	<b>112</b>
Belgium	2	3	3
Bulgaria	8	5	4
Czechia	8	3	5
Denmark	5	:	6
Germany	4	3	:
Estonia	1	1	6
Ireland	4	5	4
Greece	1	1	1
Spain	6	4	4
France	1	1	2
Croatia	1	2	3
Italy	3	3	2
Cyprus	1	1	1
Latvia	1	1	2
Lithuania	3	3	6
Luxembourg	3	4	3
Hungary	7	5	4
Malta	1	1	1
Netherlands	≈3	3	4
Austria	:	6	6
Poland	3	7	4
Portugal	1	4	5
Romania	8	8	5
Slovenia	6	7	8
Slovakia	5	5	5
Finland	3	3	4
Sweden	3	3	7
United Kingdom	7	6	7
Norway	4	5	5
Montenegro	:	:	1
North Macedonia	1	2	3
Serbia	:	:	1
Turkey	1	8	7
Bosnia and Herzegovina	:	:	4
Kosovo*	:	:	1
Moldova	:	:	2

: data not available

(\*) This designation is without prejudice to positions on status, and is in line with UNSCR 1244/1999 and the ICJ Opinion on the Kosovo Declaration of Independence.

Note: retailers are considered as "main" if they sell at least 5% of the total national electricity consumption.

Detailed table (2003-2017) available in 'Source data for tables and graphs'

Source: Eurostat (This data is not yet available in the Eurostat dissemination database)

eurostat 



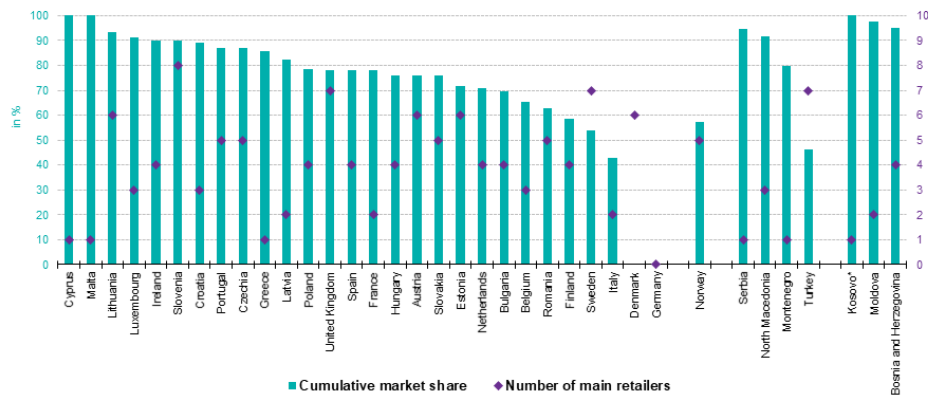
Table 6: Number of main electricity retailers, 2003-2017

Eight main companies can be found in Slovenia, seven in Sweden and in the United Kingdom. Markets where only one main company is dealing with the sales of electricity are registered in Greece, Cyprus, and Malta. (See table 6). Germany did not report the number of main retailers they have.

Figure 2 illustrates the number of main electricity retailers to final consumers and their cumulative market shares for all EU Member States plus Norway, Turkey, Bosnia and Herzegovina, Serbia, Montenegro, north Macedonia, Kosovo and Moldova.

If one looks to the remaining market, which is the market that is covered by non-main retail companies that have a market coverage of less than 5 %, this market for "minor" retail companies is the largest in Sweden (46 %) and in Italy (57 %). The market for "minor" retail companies is below 20 % in 11 out of the 26 EU countries that reported this indicator.

Number of main electricity retailers and their cumulative market share, 2017



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Source: Eurostat (This data is not yet available in the Eurostat dissemination database)



Figure 2: Number of main electricity retailers and their cumulative market share, 2017

## Source data for tables and graphs

- [Download Excel file](#)

## Data sources

The information used to create this article was collected on the basis of a questionnaire "Competition Indicators for the electricity market 2017".

All 28 EU Member States plus Norway, North Macedonia, Bosnia and Herzegovina, Montenegro, Serbia, Turkey, Kosovo and Moldova returned the questionnaires to Eurostat but sometimes information for individual indicators was not available or confidential. Ukraine returned an empty questionnaire.

The reporting was done on a voluntary basis.

## Context

Since July 2004, small business consumers in the EU have been free to switch their electricity supplier, and in July 2007 this right was extended to all consumers. Independent national regulatory authorities have been established across the Member States to ensure that suppliers and network companies operate correctly. However, a number of shortcomings were identified in the opening-up of markets,

and it was therefore decided to embark upon a third legislative package of measures with the aim of ensuring that all users could take advantage of the benefits provided by a truly competitive energy market. The [European Commission](#) launched its third legislative package to liberalise energy markets in September 2007. These proposals were designed to: create a competitive energy market; expand consumer choice; promote fairer prices; result in cleaner energy; and promote the security of supply. During 2009, a number of these proposals were adopted by the [European Parliament](#) and the [Council](#).

- Regulation 713/2009 of 13 July 2009 [establishing an agency for the cooperation of energy regulators](#);
- Regulation 714/2009 of 13 July 2009 on [conditions for access to the network for cross-border exchanges in electricity](#) and repealing Regulation 1228/2003;
- Directive 2009/72/EC of 13 July 2009 concerning [common rules for the internal market in electricity](#) and repealing Directive 2003/54/EC.

## Notes

1. [Jump up](#)↑ This designation is without prejudice to positions on status, and is in line with UNSCR 1244/1999 and the ICJ Opinion on the Kosovo Declaration of Independence.