

Gas Market Update – 2010 (Q1)

CER/10/077 (Amended 17/5/10)

The Commission publishes an annual report on the gas market (see latest report CER/09/170) which includes relevant information, statistics and trends on the natural gas market consumption by sector and suppliers shares across market sectors by customer number and by consumption. This latest report covers Q1 2010. The Commission aim to publish quarterly reports¹ on the gas market alongside the annual report which is published in October.

Key Points

Market Share

- At the end of Q1 2010 BG Energy had 98% market share of the domestics, 53% market share of the NDM I/C², 60% market share of the FVT³ and 34% market share of the RTF⁴. BG Energy's overall share of the retail market is down 9% (from 70% to 61%) against end of year figures for 2009. All markets shares are by consumption.
- In Q1 2010 independents increased their market share in the NDM I/C sector by approximately 17%.
- During Q1 2010 independents also increased their market share of the FVT sector by approximately 12%.
- Finally in Q1 2010 independents increased their market share in the RTF by approximately 5%.
- Market share in the NDM domestic sector has seen no significant overall change in percentage terms. However, Flogas registered an increase of 2,023 customers during the period.

Switching

- Q1 2010 saw 2,927 customer moves across all sectors. 10 customers switched in the RTF sector while 60, 881 and 1,975 switched in the FVT, NDM I&C and NDM residential sectors respectively.

¹ All consumption and customer number data supplied by GPRO

² Non Daily Metered Industrial & Commercial

³ Fuel Variation Tariff

⁴ Regulated Tariff Formula

Demand

- Total consumption across all sectors (including transmission connected sites) was 17,730 GWh in Q1 2010. Powergen accounted for 57% of total demand.

Tariffs

- 2 separate tariff decreases for NDM (including FVT) customers were announced in Q1 2010. NDM I&C and residential (excluding FVT) unit rate decreased by an average 8% in February, meanwhile the FVT fixed charge decreased by 4% in April.

NDM Residential Market

Figures 1 & 2 show the breakdown of the NDM residential market by volumes and customer numbers respectively for Q1. BG Energy's customer numbers in this sector remain much the same at the end 2009, meanwhile Flogas increased their customers numbers by 2,023 to 15,248.

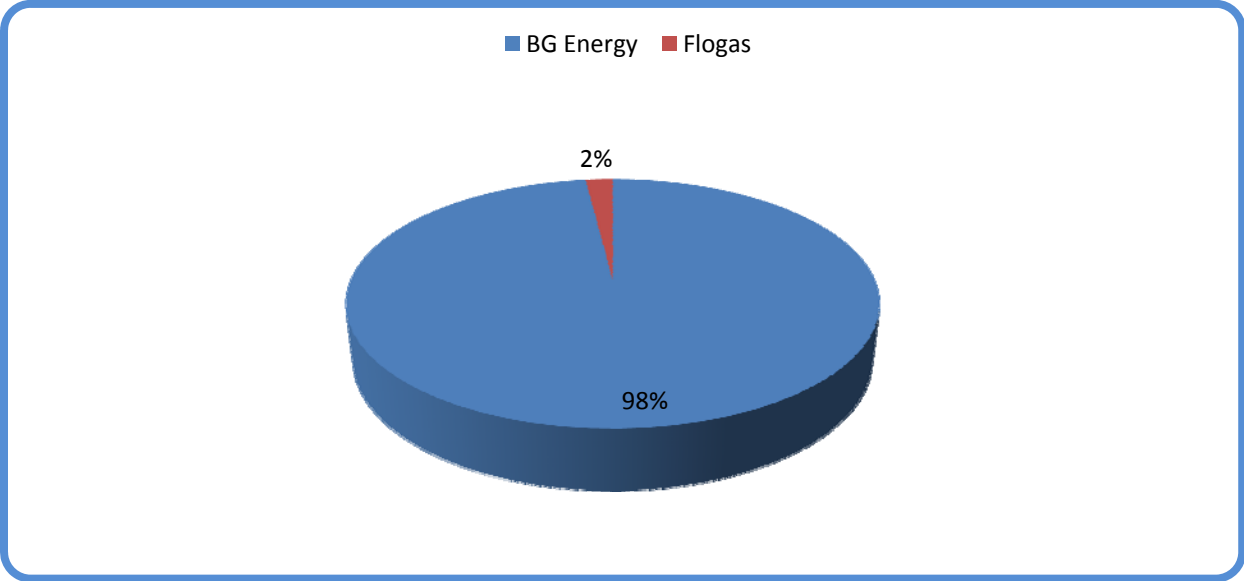


Fig 1: NDM Residential Market by volume

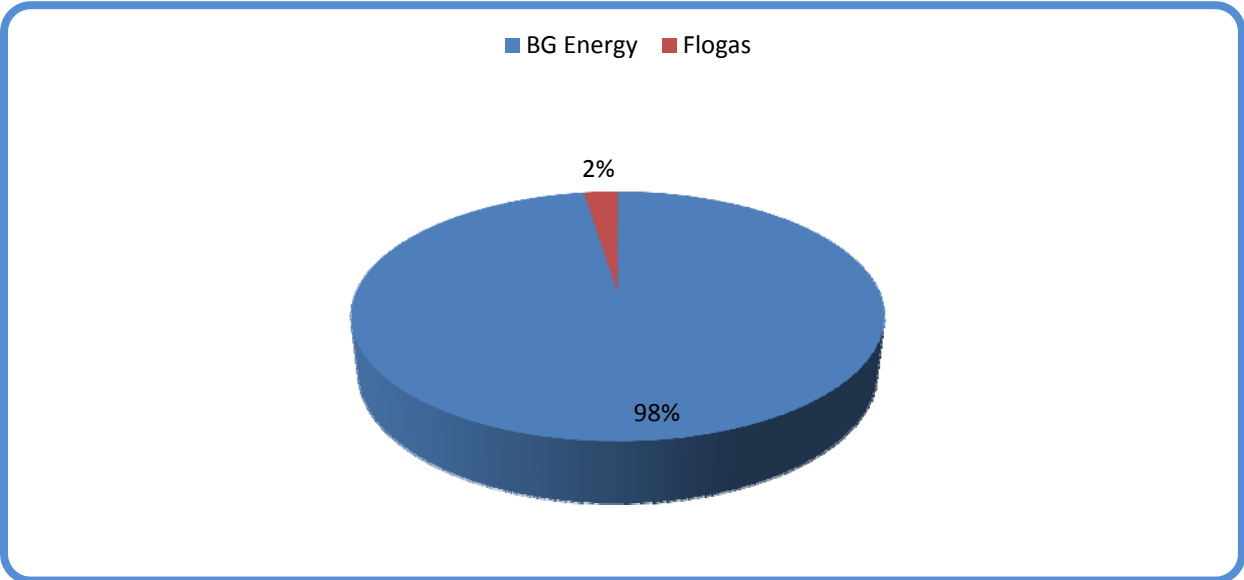


Figure 2: NDM Residential Market by no's

NDM I&C Market

Figures 3 & 4 show the breakdown of the NDM I&C market by volumes and customer numbers respectively for Q1. BG Energy's share of this sector has decreased by approximately 17% since end 2009.

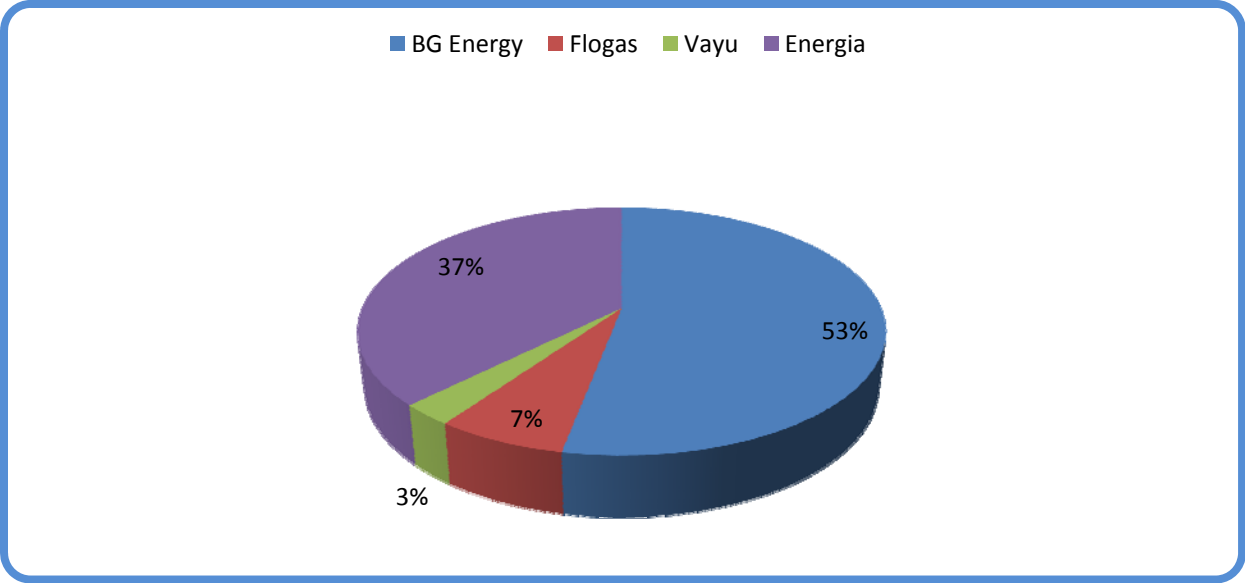


Figure 3: NDM I&C Market by volume

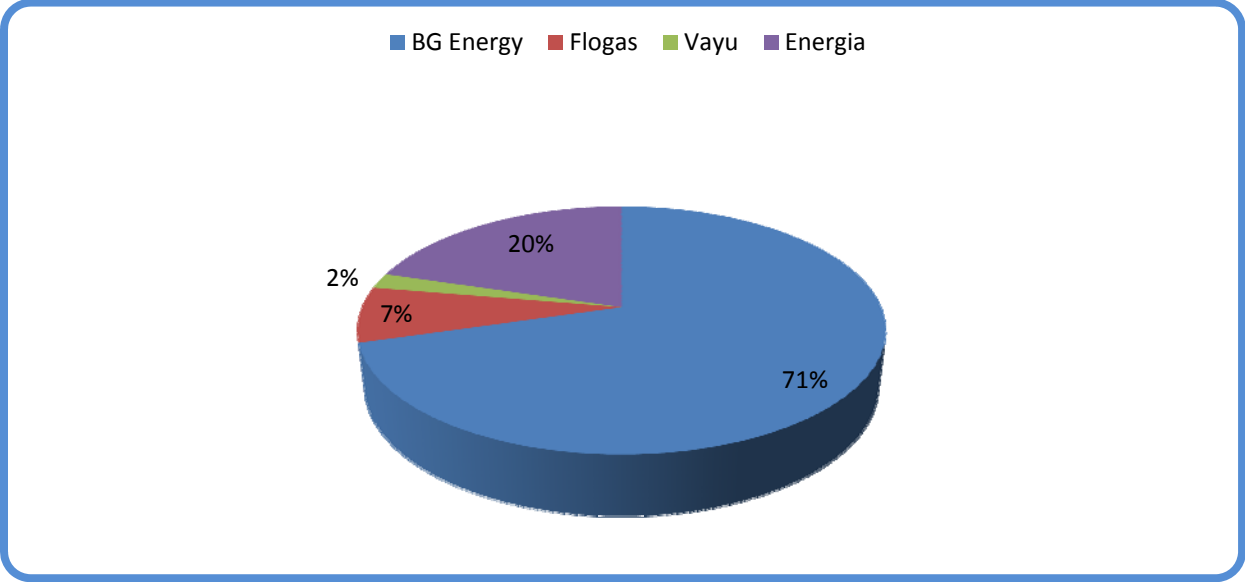


Figure 4: NDM I&C market by customer numbers

FVT Market

Figures 4 & 5 show the breakdown of the FVT market by volumes and customer numbers respectively for Q1. BG Energy's share of this sector has decreased by approximately 11% since end 2009.

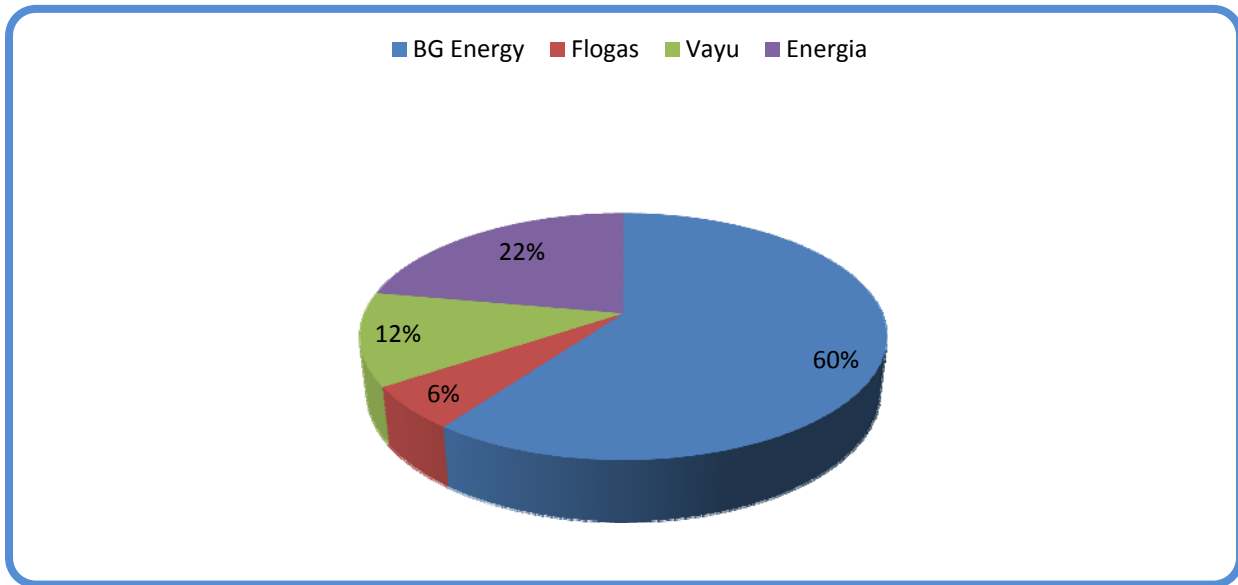


Figure 4: FVT market by volume

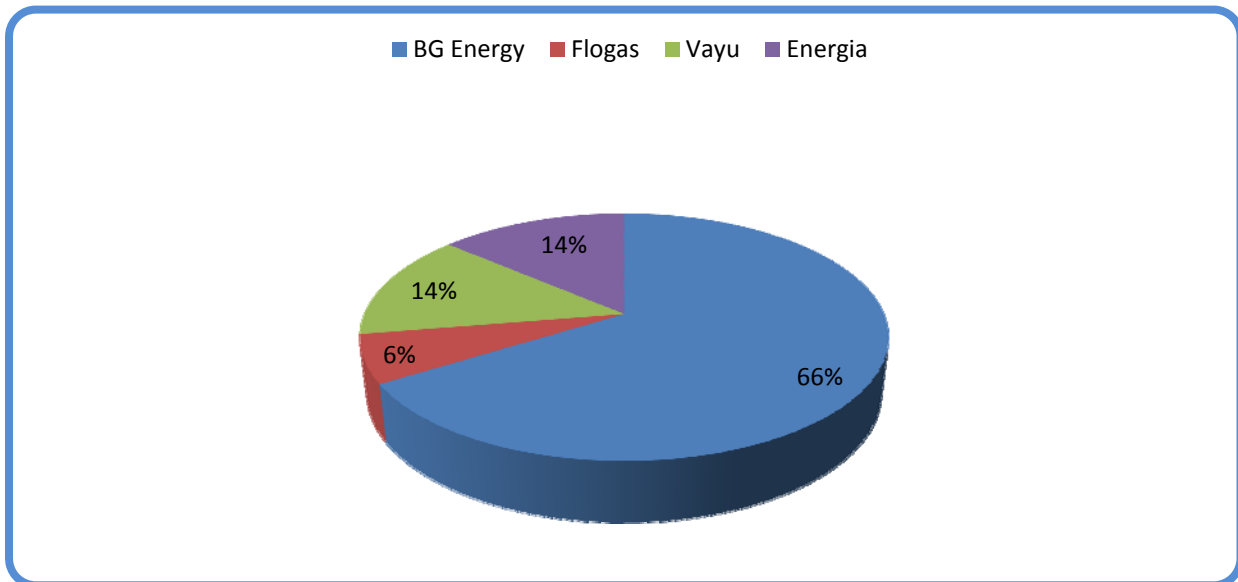


Figure 5: FVT market by customer numbers

RTF Market

Figures 5 & 6 show the breakdown of the total RTF market by volumes and customer numbers respectively for Q1. BG Energy's share of this sector has decreased by approximately 5% since end 2009.

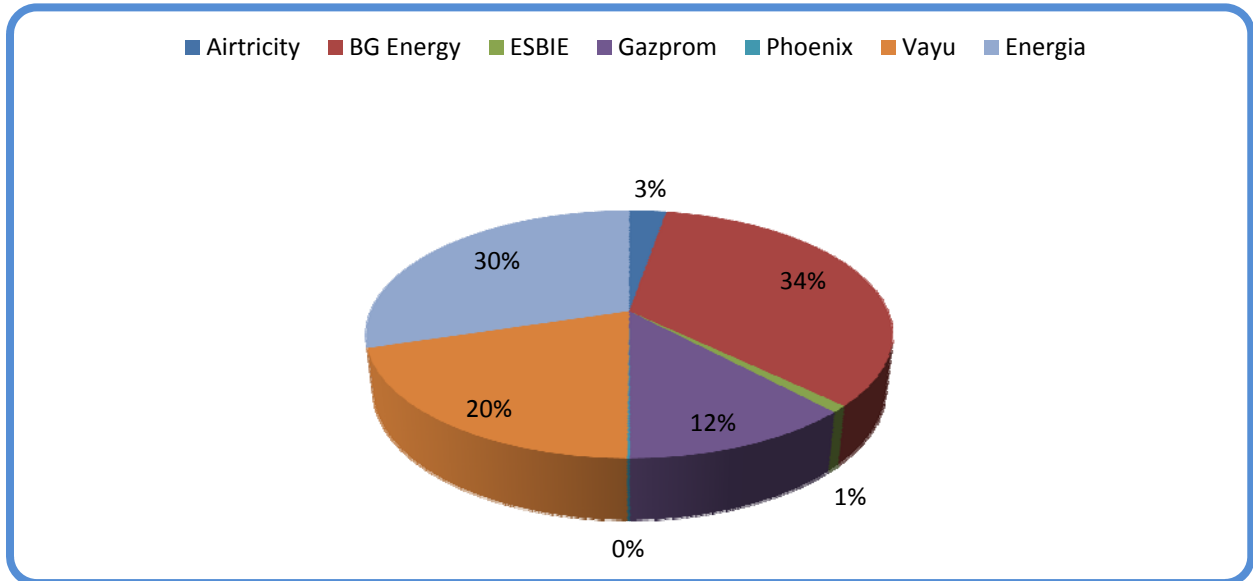


Figure 5: Total RTF market by volume

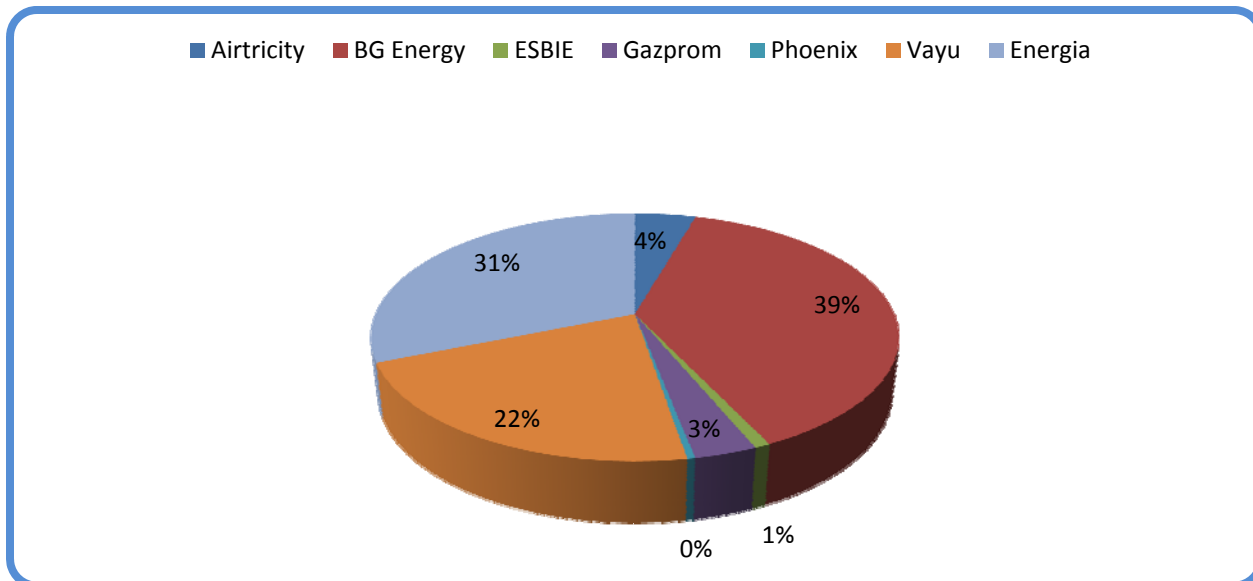


Figure 6: Total RTF market by customer numbers

Customer number breakout Q1 2010

<i>Supplier</i>	<i>PowerGen⁵</i>	<i>Above RTF (non-powergen)</i>	<i>Total RTF</i>	<i>FVT</i>	<i>NDM I&C</i>	<i>NDM Res</i>
Airtricity	-	-	11	-	-	-
BG Energy	2	3	95	1135	15686	605532
ESBIE	-	-	2	-	-	-
Flogas	-	-	-	108	1612	15248
Gazprom	-	-	8	-	-	-
Phoenix	-	1	1	-	-	-
Vayu	-	-	53	239	445	-
Energia	2	-	77	235	4523	-
Total	15⁶	4	247	1717	22266	620780

Consumption volume (GWh) breakout Q1 2010

<i>Supplier</i>	<i>PowerGen</i>	<i>Above RTF (non-powergen)</i>	<i>Total RTF</i>	<i>FVT</i>	<i>NDM I&C</i>	<i>NDM Res</i>
Airtricity	-	-	40	-	-	-
BG Energy	2406	203	510	569	478	3902
ESBIE	-	-	13	-	-	-
Flogas	-	-	-	53	61	78
Gazprom	-	-	177	-	-	-
Phoenix	-	69	2	-	-	-
Vayu	-	-	299	115	25	-
Energia	2724	-	440	210	338	0
Total	10147	272	1481	948	902	3980

Customer switching by sector Q1 2010

<i>Sector</i>	<i>LDM</i>	<i>DM</i>	<i>FVT</i>	<i>NDM MBU</i>	<i>NDM SBU</i>	<i>NDM Res</i>
No's	1	10	60	440	441	1975

⁵ Only suppliers in the retail market are shown.

⁶ Total includes all shipper/supplier to Powergen.