ACER

European Union Agency for the Cooperation of Energy Regulators

Gas country sheets

Monitoring data 2024

18 July 2025

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Country sheet guidance

The ACER country sheets present key metrics on retail gas markets across EU Member States and Norway for the year 2024, with a particular focus on consumer-related indicators. As the European Union advances towards its climate and energy targets, understanding how gas markets are adapting is essential. These sheets aim to inform policymakers, regulators, and market participants by offering clear, comparable data on gas consumption trends, market competition, and the role of gas in the wider energy system. This guidance outlines the definitions of each indicator featured in the country sheets, along with the sources and methodologies used.

Competition & network metrics

This section provides an overview of the main dynamics shaping the gas retail market in each Member State, offering valuable insights into its structure, competitiveness, and overall performance. It highlights essential market metrics that reflect the broader trends and factors influencing gas consumption, pricing and market competitiveness.

- **Consumers (mln)** - Refers to the number of household and non-household consumers in each Member State in millions, as measured by the number of metering points in the sector.
- **Average demand (MWh)** - Refers to the average annual gas demand of household and non-household consumers in MWh.
- **Unit price (€c/kWh)** - Refers to the average cost paid by household and non-household consumers per kWh of gas consumed. This metric reflects the final price of gas, considering all components of the bill, such as the energy cost, network charges, taxes, and any applicable subsidies or discounts.
- **Concentration (HHI)** - Refers to the market concentration for the household and non-household markets, measured by the market share. The Herfindahl-Hirschman Index (HHI) is commonly used to measure market concentration, ranging from 0 to 10,000. An HHI score below 2,000 indicates a competitive market (green), a score between 2,000 and 4,000 indicates a concentrated market (orange), and a score above 4,000 indicates a highly concentrated market (red).
- **Nationwide suppliers** - Refers to the number of nationwide suppliers operating in the household or non-household sectors in the Member State.
- **Switching** - Refers to the share of household consumers (measured by metering points) and non-household consumers (measured by consumption volume) which have switched gas suppliers during the year.
- **Transmission and distribution length (km)** - Refers to the length of the gas transmission and distribution network in the Member State, measured in kilometres.

Share of gas for electricity generation; Gas demand

This section analyses the distribution of gas demand across sectors and its overall share in the energy mix. It highlights the role of gas in various industries and its contribution to total energy consumption, offering a clear picture of its current and evolving importance in the energy landscape.

- **Share of gas for electricity generation** - Refers to the share of electricity generated from gas out of the total electricity generation mix. This indicator reflects the role of gas as a source of electricity compared to other sources such as renewables, coal, or nuclear.
- **Breakdown of gas demand** - Refers to the distribution of gas demand across the sectors electricity generation, distribution, and industrial use. Together with the total gas demand, this sectoral breakdown illustrates how gas consumption is allocated within various industries and segments of the economy.

Consumer metrics; Household energy consumption

This section evaluates how consumers interact with the retail gas market and the broader trends in household energy consumption. It provides valuable insights into how consumer behaviour is evolving in response to market dynamics and the transition towards more sustainable energy solutions.

- **Contract uptake (%)** - Refers to the type of gas contracts that consumers in each Member State have signed up to, differentiating between annual/multiannual market-based fixed-price, fixed-term, market-based monthly/quarterly spot variable, renewable gas, regulated, and other contracts.
- **Bill breakdown (%)** - Refers to the different components which make up the final gas price for households and non-households. The bill breakdown illustrates how the components of energy, network costs, VAT, and other taxes influence consumers' final gas price formation. Negative components, indicating subsidies which reduce the final price, are not shown in the figure as they do not account for consumer expenditure.
- **Annual expenditure** - Next to the bill breakdown, the annual expenditure of households and non-households is shown. This refers to the average amount of money consumers spend on gas per year in each country.
- **Household energy consumption** – This shows how energy is used within households and the types of fuels employed. Analysing this data helps identify which end-uses are more easily electrifiable and where there is potential for fuel switching, contributing to the overall decarbonisation of the residential sector.

Decarbonisation metrics

These metrics provide insights into the evolving role of gas within the energy mix, its environmental implications, and its impact on retail consumers. Tracking emissions, the transition to renewable alternatives such as biomethane, and the influence of gas on electricity pricing enables us to assess progress in reducing carbon footprints, advancing towards a more sustainable energy future, and understanding the broader effects on consumer pricing dynamics.

- **Biomethane production** - Refers to the share of biomethane in the total gas consumption of the Member State. Biomethane is a renewable alternative to conventional natural gas, and its growing share indicates the shift towards cleaner, sustainable energy sources in the gas sector.
- **Demand change from 2022** - Refers to the change in gas demand compared to the base year of 2022. This metric shows how gas consumption trends are evolving, considering factors like electrification, energy efficiency measures, the uptake of renewable energy sources, and shifts in consumer behaviour.
- **Days where gas sets electricity price** - Refers to the number of days on which the price of gas determines the electricity price in the wholesale electricity market.

The complete list of sources and methodologies employed for each indicator can be found in the methodology of the country sheets below.

Gas country sheets 2024

AUSTRIA

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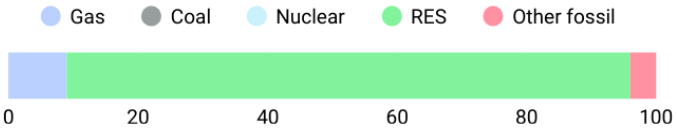
Competition & network metrics

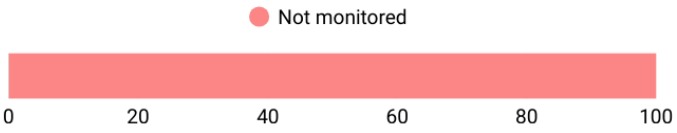
Consumers (mln)	1.05	0.07
Average demand (MWh)	12.5	867.0
Unit price (€c/kWh)	12.7 ↓-17%	8.9 ↓-21%
Concentration (HHI)	5,620	1,030
Nationwide suppliers	17 ↓-2	25 ↓-6
Switching	6.2% ↓-24%	2.5% ↓-34%

Transmission length (km)	44,632
Distribution length (km)	2,013

Share of gas for electricity generation



Breakdown of gas demand



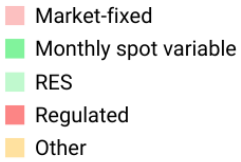
Total gas demand (TWh) 74.27

Consumer metrics

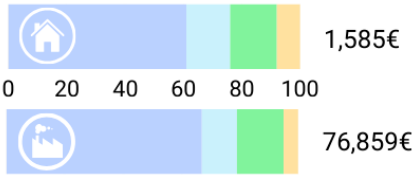
Contract uptake (%)

Not monitored

Not monitored



Bill breakdown (%) and annual expenditure



Household energy consumption

Usage

Share of fuels

Decarbonisation metrics

Biomethane production	0.2%
Demand change from 2022	-13.56%
Days where gas sets electricity price	N.A.

Strengths

- High heating demand offers major decarbonisation impact from efficiency and fuel switching.

Weaknesses

- A more dynamic monitoring of the retail market enables faster awareness of and response to changing market dynamics.
- Concentration dampens competitive development in the household market.

Opportunities

- Efficiency upgrades and fuel switching in buildings can drive emission reductions.
- Green H2 supply could decarbonise industrial heating without major infrastructure changes.

Threats

- Declining gas consumer base may increase costs for remaining consumers.
- Limited availability of low-carbon gases risks undermining the gas sector's contribution to the energy transition.

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BELGIUM

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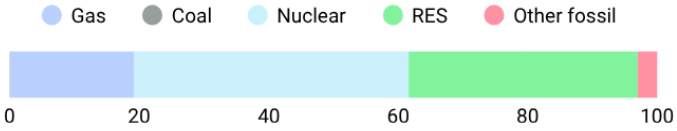
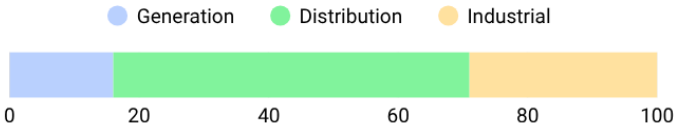
Competition & network metrics

Consumers (mln)	3.14	0.46
Average demand (MWh)	11.1	250.1
Unit price (€c/kWh)	8.5 ↓ -20%	8.5 ↓ -14%
Concentration (HHI)	2,520	2,630
Nationwide suppliers	6 ↓ -1	15 ↕ 0
Switching	18.4% ↕ 0%	N.A.
Transmission length (km)	4,100	
Distribution length (km)	75,310	

Share of gas for electricity generation



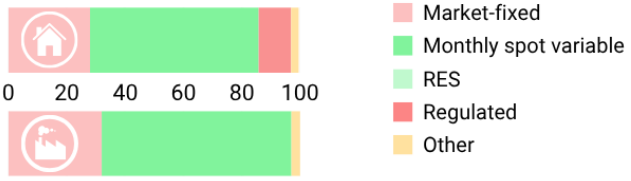
Breakdown of gas demand



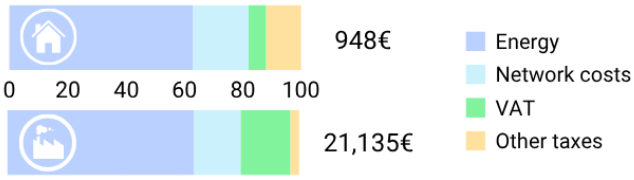
Total gas demand (TWh) 149.32

Consumer metrics

Contract uptake (%)

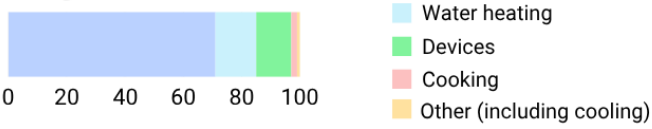


Bill breakdown (%) and annual expenditure

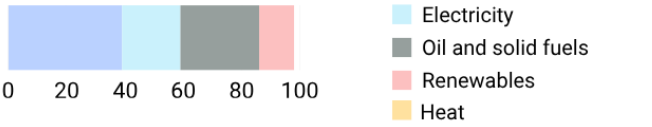


Household energy consumption

Usage



Share of fuels



Decarbonisation metrics

Biomethane production	N.A.
Demand change from 2022	-9.37%
Days where gas sets electricity price	100

Strengths

- High heating demand offers major decarbonisation impact from efficiency improvements and fuel switching.

Weaknesses

- A more dynamic monitoring of the retail market enables faster awareness of and response to changing market dynamics.
- Moderate market concentration for both household and non-household consumers.

Opportunities

- Efficiency upgrades and fuel switching in buildings can drive emission reductions.
- Biomethane could support heat decarbonisation without major infrastructure changes.

Threats

- Declining gas consumer base may increase costs for remaining consumers.
- Limited availability of low-carbon gases risks undermining the gas sector's contribution to the energy transition.

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BULGARIA

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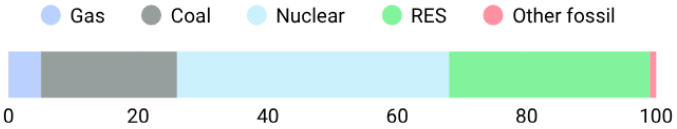
Competition & network metrics

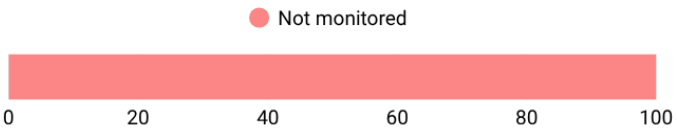
Consumers (mln)	0.15	0.01
Average demand (MWh)	7.1	3,000
Unit price (€c/kWh)	6.3 ↓ -20%	5.1 ↓ -20%
Concentration (HHI)	4,050	2,980
Nationwide suppliers	25 N.A.	44 ↓ -1
Switching	N.A.	N.A.

Transmission length (km)	3,630
Distribution length (km)	5,733

Share of gas for electricity generation



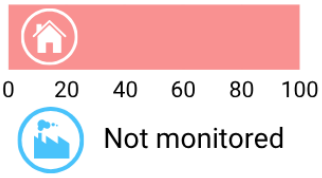
Breakdown of gas demand



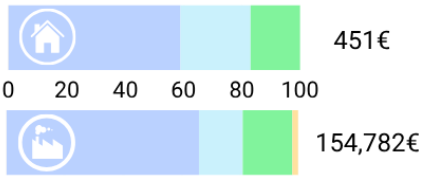
Total gas demand (TWh) 27.85

Consumer metrics

Contract uptake (%)

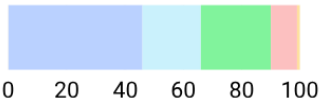


Bill breakdown (%) and annual expenditure

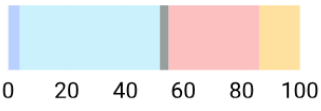


Household energy consumption

Usage



Share of fuels



Decarbonisation metrics

Biomethane production	N.A.
Demand change from 2022	0.61%
Days where gas sets electricity price	183

Strengths

- High heating demand offers major decarbonisation impact from efficiency and fuel switching.

Weaknesses

- A more dynamic monitoring of the retail market enables faster awareness of and response to changing market dynamics.

Opportunities

- Efficiency upgrades and fuel switching in buildings can drive emission reductions.
- Biomethane could support heat decarbonisation without major infrastructure changes.

Threats

- Declining gas consumer base may increase costs for remaining consumers.
- Limited availability of low-carbon gases risks undermining the gas sector's contribution to the energy transition.

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CROATIA

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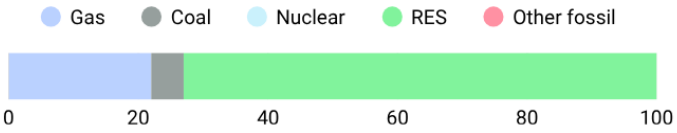
Competition & network metrics

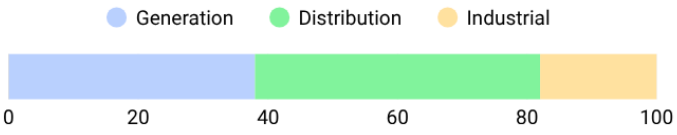
Consumers (mln)	0.66	0.05
Average demand (MWh)	9.3	349.3
Unit price (€c/kWh)	4.5 ↕ 0%	6.0 ↓ -18%
Concentration (HHI)	1,660	2,320
Nationwide suppliers	1 ↕ 0	9 ↑ 9
Switching	31.0% N.A.	14.2% N.A.

Transmission length (km)	2,544
Distribution length (km)	20,049

Share of gas for electricity generation



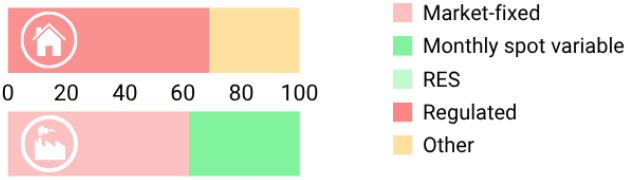
Breakdown of gas demand



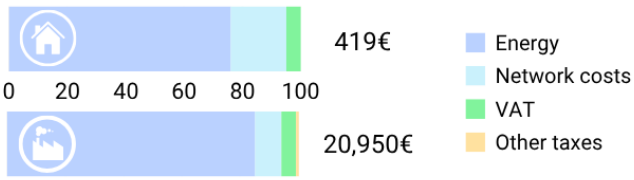
Total gas demand (TWh)	24.59

Consumer metrics

Contract uptake (%)



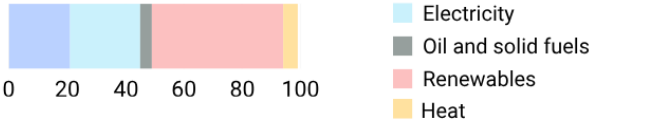
Bill breakdown (%) and annual expenditure



Household energy consumption

Usage

Share of fuels



Decarbonisation metrics

Biomethane production	N.A.
Demand change from 2022	-4.64%
Days where gas sets electricity price	166

Strengths

- High heating demand offers major decarbonisation impact from efficiency and fuel switching.
- While regulated prices remain in place, the percentage has declined from 90% to 69%.

Weaknesses

- A more dynamic monitoring of the retail market enables faster awareness of and response to changing market dynamics.

Opportunities

- Efficiency upgrades and fuel switching in buildings can drive emission reductions.
- Biomethane could support heat decarbonisation without major infrastructure changes.

Threats

- Declining gas consumer base may increase costs for remaining consumers.
- Limited availability of low-carbon gases risks undermining the gas sector's contribution to the energy transition.

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CZECHIA

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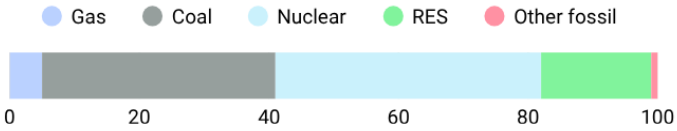
Competition & network metrics

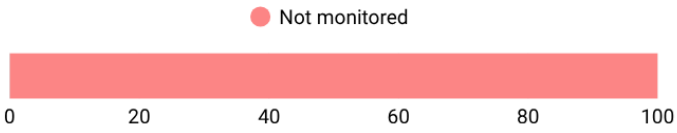
Consumers (mln)	2.52	0.20
Average demand (MWh)	7.5	52.7
Unit price (€c/kWh)	10.6 ↓ -7%	8.7 ↑ 3%
Concentration (HHI)	2,610	1,680
Nationwide suppliers	74 ↓ -1	83 ↑ 8
Switching	6.7% ↑ 22%	16.9% N.A.

Transmission length (km)	4,058
Distribution length (km)	75,089

Share of gas for electricity generation



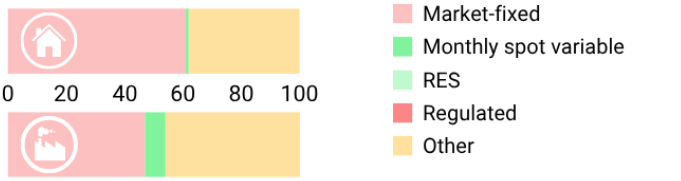
Breakdown of gas demand



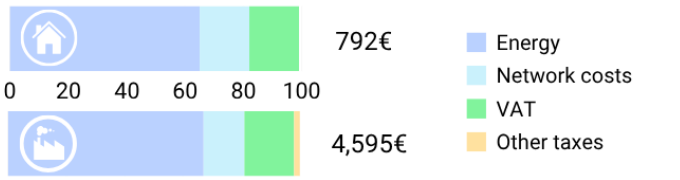
Total gas demand (TWh)	29.48

Consumer metrics

Contract uptake (%)



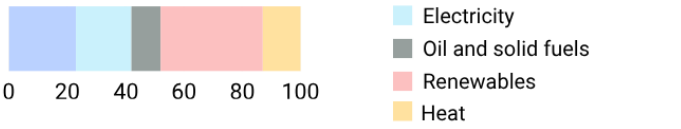
Bill breakdown (%) and annual expenditure



Household energy consumption

Usage

Share of fuels



Decarbonisation metrics

Biomethane production	N.A.
Demand change from 2022	-9.39%
Days where gas sets electricity price	149

Strengths

- High heating demand offers major decarbonisation impact from efficiency and fuel switching.

Weaknesses

- A more dynamic monitoring of the retail market enables faster awareness of and response to changing market dynamics.

Opportunities

- Efficiency upgrades and fuel switching in buildings can drive emission reductions.
- Biomethane could support heat decarbonisation without major infrastructure changes.

Threats

- Declining gas consumer base may increase costs for remaining consumers.
- Limited availability of low-carbon gases risks undermining the gas sector's contribution to the energy transition.

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DENMARK

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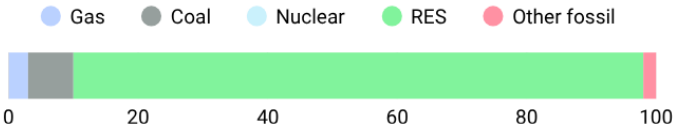
Competition & network metrics

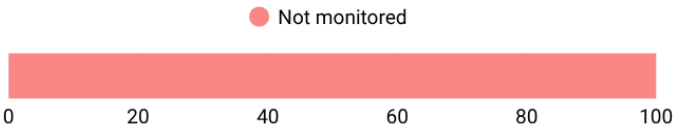
Consumers (mln)	N.A.	N.A.
Average demand (MWh)	N.A.	N.A.
Unit price (€c/kWh)	12.4 ↓-22%	N.A.
Concentration (HHI)	2,840	2,000
Nationwide suppliers	13 ↑1	13 ↑1
Switching	1.4 ↓-53%	3.4

Transmission length (km)	1,250
Distribution length (km)	N.A.

Share of gas for electricity generation



Breakdown of gas demand



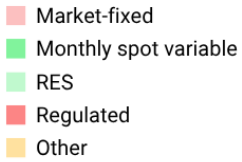
Total gas demand (TWh)	14.50

Consumer metrics

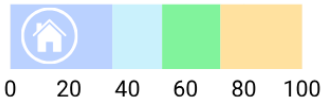
Contract uptake (%)

Not monitored

Not monitored

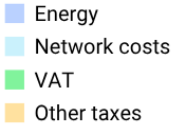


Bill breakdown (%) and annual expenditure



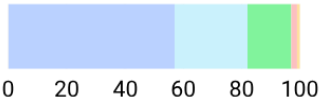
N.A.

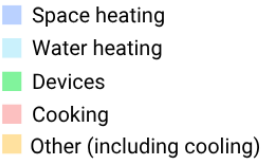
Not monitored N.A.



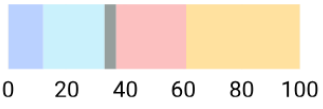
Household energy consumption

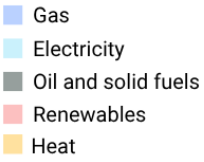
Usage





Share of fuels





Decarbonisation metrics

Biomethane production	N.A.
Demand change from 2022	-6.62%
Days where gas sets electricity price	104

Strengths

- High heating demand offers major decarbonisation impact from efficiency and fuel switching.

Weaknesses

- A more dynamic monitoring of the retail market enables faster awareness of and response to changing market dynamics.

Opportunities

- Efficiency upgrades and fuel switching in buildings can drive emission reductions.
- Biomethane could support heat decarbonisation without major infrastructure changes.

Threats

- Declining gas consumer base may increase costs for remaining consumers.
- Limited availability of low-carbon gases risks undermining the gas sector's contribution to the energy transition.

Gas country sheets 2024

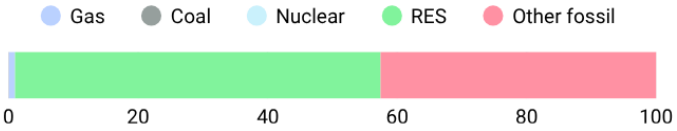
ESTONIA

ACER
European Union Agency for the Cooperation of Energy Regulators

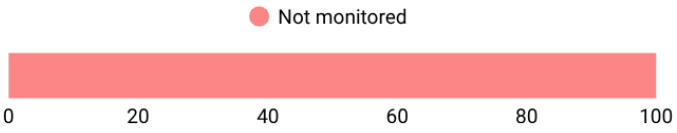
Competition & network metrics

Consumers (mln)	0.05	0.01
Average demand (MWh)	7.1	243.4
Unit price (€c/kWh)	7.4 ↓ -22%	7.4 ↓ -24%
Concentration (HHI)	4,780	4,330
Nationwide suppliers	17 ↕ 0	24 ↑ 1
Switching	8.2% ↓ -7%	N.A.
Transmission length (km)	977	
Distribution length (km)	2,307	

Share of gas for electricity generation



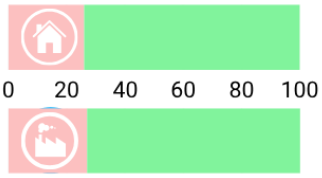
Breakdown of gas demand



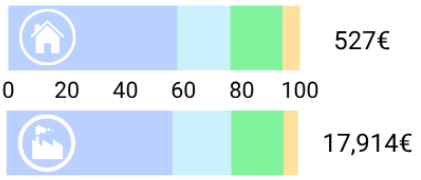
Total gas demand (TWh) 3.86

Consumer metrics

Contract uptake (%)

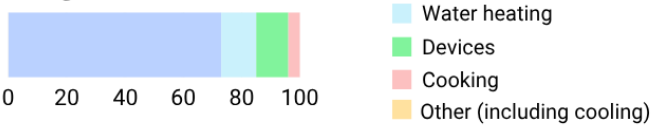


Bill breakdown (%) and annual expenditure



Household energy consumption

Usage



Share of fuels

Decarbonisation metrics

Biomethane production	N.A.
Demand change from 2022	-0.86%
Days where gas sets electricity price	157

Strengths

- High heating demand offers major decarbonisation impact from efficiency and fuel switching.

Weaknesses

- A more dynamic monitoring of the retail market enables faster awareness of and response to changing market dynamics.

Opportunities

- Efficiency upgrades and fuel switching in buildings can drive emission reductions.
- Biomethane could support heat decarbonisation without major infrastructure changes.

Threats

- Declining gas consumer base may increase costs for remaining consumers.
- Limited availability of low-carbon gases risks undermining the gas sector's contribution to the energy transition.

Gas country sheets 2024

FRANCE

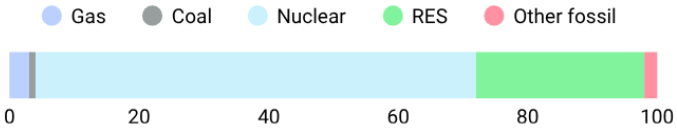
ACER
European Union Agency for the Cooperation of Energy Regulators

Competition & network metrics

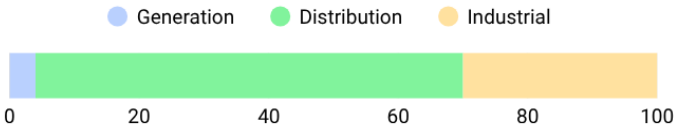
Consumers (mln)	10.19	0.52
Average demand (MWh)	11.4	493.2
Unit price (€c/kWh)	12.6 ↑ 14%	11.0 ↓ -6%
Concentration (HHI)	3,400	1,500
Nationwide suppliers	18 ↓ -2	34 ↑ 2
Switching	13.0% N.A.	18.0% N.A.

Transmission length (km)	32,635
Distribution length (km)	200,715

Share of gas for electricity generation



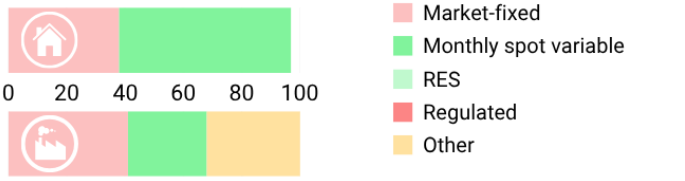
Breakdown of gas demand



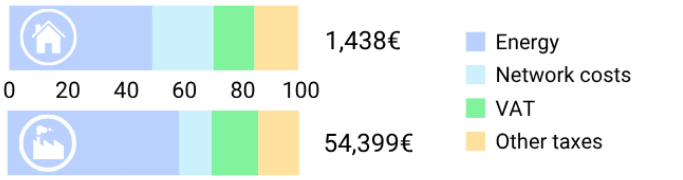
Total gas demand (TWh)	374.10

Consumer metrics

Contract uptake (%)

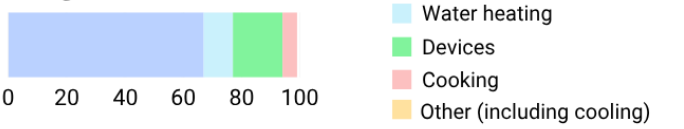


Bill breakdown (%) and annual expenditure



Household energy consumption

Usage



Share of fuels

Decarbonisation metrics

Biomethane production	3.20%
Demand change from 2022	-16.96%
Days where gas sets electricity price	75

Strengths

- Low share of gas in electricity generation.
- High heating demand offers major decarbonisation impact from efficiency and fuel switching.

Weaknesses

- Large network infrastructure likely to generate sunk costs.
- Lack of contract monitoring limits visibility on emissions and consumer behaviour.

Opportunities

- Efficiency upgrades and fuel switching in buildings can drive emission reductions.
- Biomethane could support heat decarbonisation without major infrastructure changes.

Threats

- Declining gas consumer base may increase costs for remaining consumers.
- Limited availability of low-carbon gases risks undermining the gas sector's contribution to the energy transition.

Gas country sheets 2024

GERMANY

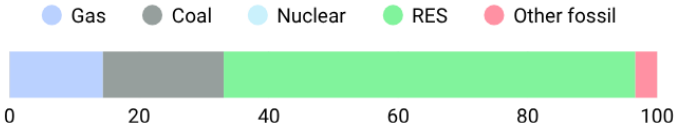
ACER
European Union Agency for the Cooperation of Energy Regulators

Competition & network metrics

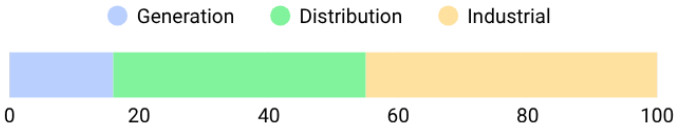
Consumers (mln)	12.83	2.45
Average demand (MWh)	27.1	210.6
Unit price (€c/kWh)	12.2 ↑ 3%	10.9 ↓ -1%
Concentration (HHI)	N.A.	N.A.
Nationwide suppliers	142 ↑ 16	N.A.
Switching	16.2% ↑ 44%	10.1% ↓ -7%

Transmission length (km)	38,610
Distribution length (km)	N.A.

Share of gas for electricity generation



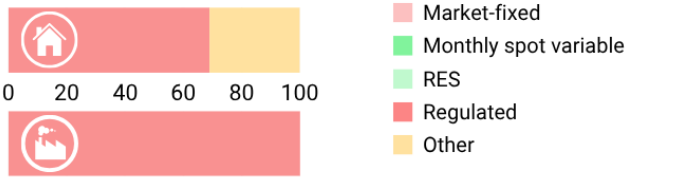
Breakdown of gas demand



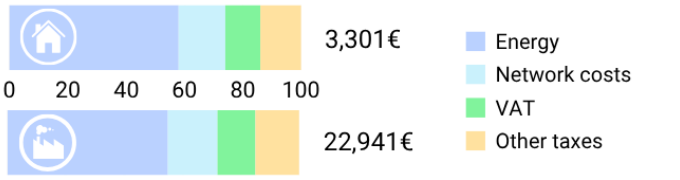
Total gas demand (TWh)	844.00

Consumer metrics

Contract uptake (%)

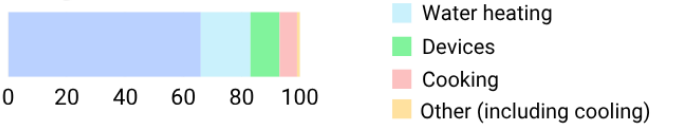


Bill breakdown (%) and annual expenditure



Household energy consumption

Usage



Share of fuels

Decarbonisation metrics

Biomethane production	N.A.
Demand change from 2022	-1.9%
Days where gas sets electricity price	124

Strengths

- High heating demand offers major decarbonisation impact from efficiency and fuel switching.
- Existing gas networks can be repurposed to transport alternative gases.

Weaknesses

- A more dynamic monitoring of the retail market enables faster awareness of and response to changing market dynamics.
- Heavy reliance on fossil gas for heating could slow progress toward climate goals.

Opportunities

- Efficiency upgrades and fuel switching in buildings can drive emission reductions.
- Low carbon gas could support decarbonisation without major infrastructure changes.

Threats

- Declining gas consumer base may increase costs for remaining consumers.
- Limited availability of low-carbon gases risks undermining the gas sector's contribution to the energy transition.

Gas country sheets 2024

GREECE

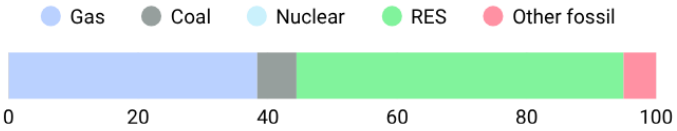
ACER
European Union Agency for the Cooperation of Energy Regulators

Competition & network metrics

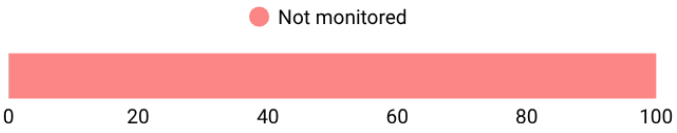
Consumers (mln)	0.61	0.02
Average demand (MWh)	8.1	407
Unit price (€c/kWh)	8.3 ↓ -21%	6.1 ↓ -26%
Concentration (HHI)	2,750	1,470
Nationwide suppliers	11 ↓ -2	19 ↓ -2
Switching	10.3% ↑ 10%	6.96% ↑ 11.3%

Transmission length (km)	1,460
Distribution length (km)	10,030

Share of gas for electricity generation



Breakdown of gas demand



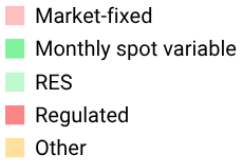
Total gas demand (TWh)	11.66

Consumer metrics

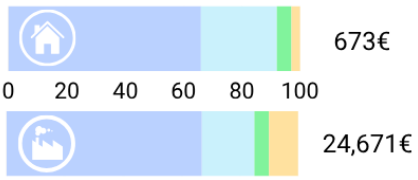
Contract uptake (%)

Not monitored

Not monitored

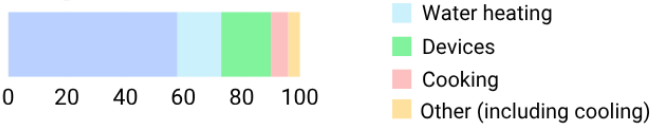


Bill breakdown (%) and annual expenditure

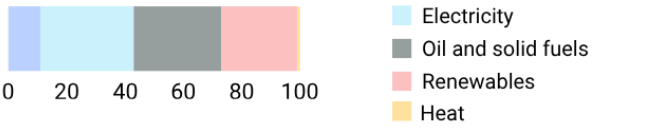


Household energy consumption

Usage



Share of fuels



Decarbonisation metrics

Biomethane production	N.A.
Demand change from 2022	18.09%
Days where gas sets electricity price	191

Strengths

- High heating demand offers major decarbonisation impact from efficiency and fuel switching.

Weaknesses

- A more dynamic monitoring of the retail market enables faster awareness of and response to changing market dynamics.

Opportunities

- Efficiency upgrades and fuel switching in buildings can drive emission reductions.
- Biomethane could support heat decarbonisation without major infrastructure changes.

Threats

- Declining gas consumer base may increase costs for remaining consumers.
- Limited availability of low-carbon gases risks undermining the gas sector's contribution to the energy transition.

Gas country sheets 2024

HUNGARY

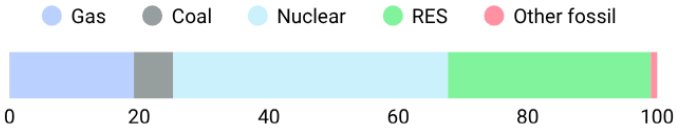
ACER
European Union Agency for the Cooperation of Energy Regulators

Competition & network metrics

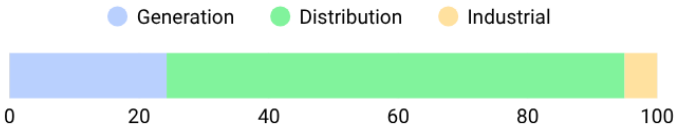
Consumers (mln)	3.20	0.18
Average demand (MWh)	10.2	317.6
Unit price (€c/kWh)	3.0 ↓-12%	9.4 ↓-34%
Concentration (HHI)	10,000	1,550
Nationwide suppliers	1 ↓-1	35 ↑11
Switching	N.A.	N.A.

Transmission length (km)	5,888
Distribution length (km)	85,561

Share of gas for electricity generation



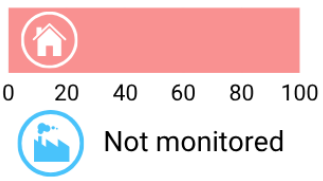
Breakdown of gas demand



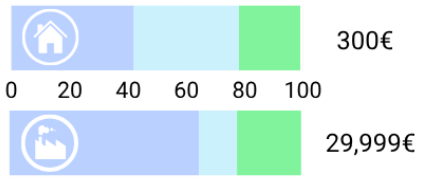
Total gas demand (TWh) 90.68

Consumer metrics

Contract uptake (%)

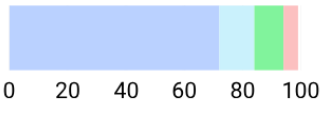


Bill breakdown (%) and annual expenditure

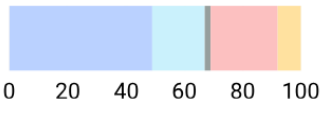


Household energy consumption

Usage



Share of fuels



Decarbonisation metrics

Biomethane production	0.9%
Demand change from 2022	-10.2%
Days where gas sets electricity price	174

Strengths

- The large number of competitive suppliers indicates healthy competition on the non-household segment of the market.

Weaknesses

- A more dynamic monitoring of the retail market enables faster awareness of and response to changing market dynamics.

Opportunities

- Efficiency upgrades and fuel switching in buildings can drive emission reductions.
- High heating demand offers major decarbonisation potential from efficiency and fuel switching.

Threats

- Declining gas consumer base may increase costs for remaining consumers.
- Limited availability of low-carbon gases risks undermining the gas sector's contribution to the energy transition.

Gas country sheets 2024

IRELAND

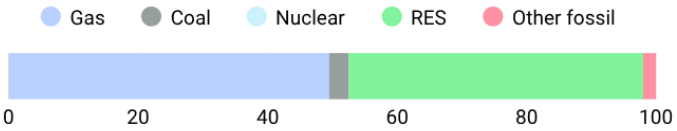
ACER
European Union Agency for the Cooperation of Energy Regulators

Competition & network metrics

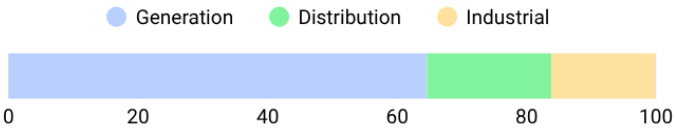
Consumers (mln)	0.69	0.03
Average demand (MWh)	8.9	149.9
Unit price (€c/kWh)	13.1 ↓-16%	11.6 ↓-18%
Concentration (HHI)	2,620	2,850
Nationwide suppliers	6 ↕0	6 ↑1
Switching	36.0%	23.0%

Transmission length (km)	2,480
Distribution length (km)	12,270

Share of gas for electricity generation



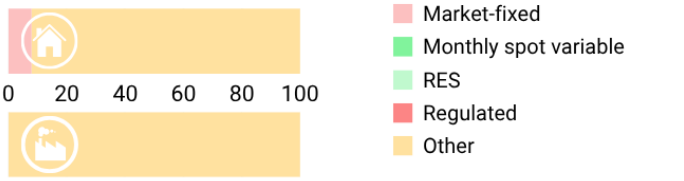
Breakdown of gas demand



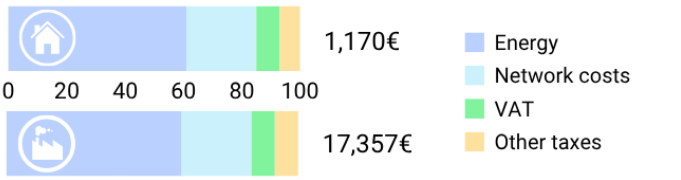
Total gas demand (TWh)	10.44

Consumer metrics

Contract uptake (%)



Bill breakdown (%) and annual expenditure



Household energy consumption

Usage

Share of fuels

Decarbonisation metrics

Biomethane production	0.1%
Demand change from 2022	-4.61%
Days where gas sets electricity price	237

Strengths

- High heating demand offers major decarbonisation impact from efficiency and fuel switching.
- High level of customer initiative through switching supplier or renegotiating tariff.

Weaknesses

- Very low biomethane production.
- Moderately concentrated retail market for both household and non-household.

Opportunities

- Efficiency upgrades and fuel switching in buildings can drive emission reductions.
- Biomethane could support heat decarbonisation without major infrastructure changes.

Threats

- Declining gas consumer base may increase costs for remaining consumers.
- Limited availability of low-carbon gases risks undermining the gas sector's contribution to the energy transition.

Gas country sheets 2024

ITALY

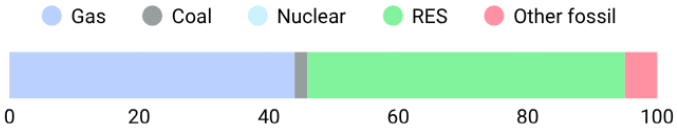
ACER
European Union Agency for the Cooperation of Energy Regulators

Competition & network metrics

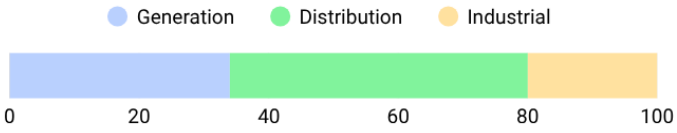
Consumers (mln)	20.45	1.39
Average demand (MWh)	7.1	338.3
Unit price (€c/kWh)	13.6 ↑ 17%	8.6 ↓ -11%
Concentration (HHI)	1,150	990
Nationwide suppliers	82 ↕ 0	35 ↕ 0
Switching	18.7% ↑ 26%	23.04 ↑ 53%

Transmission length (km)	35,430
Distribution length (km)	269,000

Share of gas for electricity generation



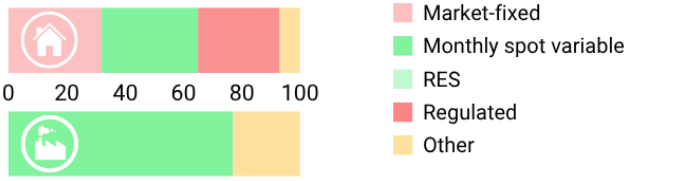
Breakdown of gas demand



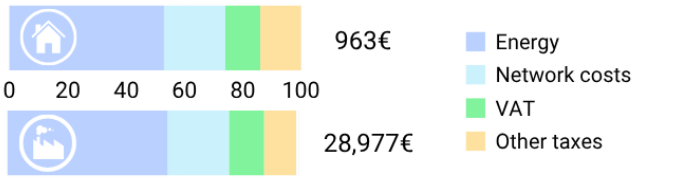
Total gas demand (TWh)	615.60

Consumer metrics

Contract uptake (%)



Bill breakdown (%) and annual expenditure



Household energy consumption

Usage

Share of fuels

Decarbonisation metrics

Biomethane production	0.4%
Demand change from 2022	-9.74%
Days where gas sets electricity price	288

Strengths

- High heating demand offers major decarbonisation impact from efficiency and fuel switching.
- High switching among retail consumers.

Weaknesses

- A more dynamic monitoring of the retail market offers enables faster awareness of and response to changing market dynamics.

Opportunities

- Efficiency upgrades and fuel switching in buildings can drive emission reductions.
- Biomethane could support heat decarbonisation without major infrastructure changes.

Threats

- Declining gas consumer base may increase costs for remaining consumers.
- Limited availability of low-carbon gases risks undermining the gas sector's contribution to the energy transition.

Gas country sheets 2024

LATVIA

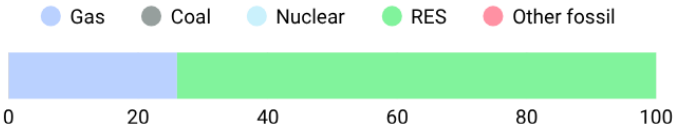
ACER
European Union Agency for the Cooperation of Energy Regulators

Competition & network metrics

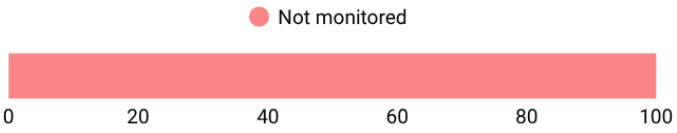
Consumers (mln)	0.36	0.01
Average demand (MWh)	3.15	N.A.
Unit price (€c/kWh)	9.0 ↓ 10%	8.2 ↓ -28%
Concentration (HHI)	4,900	2,110
Nationwide suppliers	7 ↑ 2	12 ↑ 3
Switching	5% ↓ -38%	38%

Transmission length (km)	1,190
Distribution length (km)	5,475

Share of gas for electricity generation



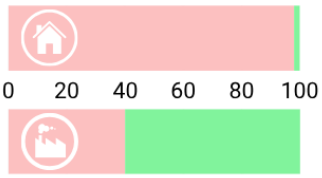
Breakdown of gas demand



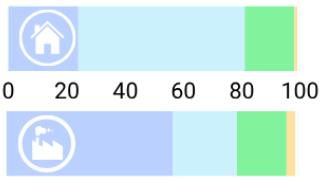
Total gas demand (TWh) 8.90

Consumer metrics

Contract uptake (%)

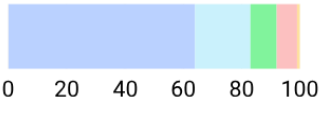


Bill breakdown (%) and annual expenditure

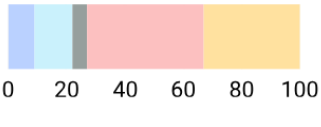


Household energy consumption

Usage



Share of fuels



Decarbonisation metrics

Biomethane production	0.6%
Demand change from 2022	-1.24%
Days where gas sets electricity price	158

Strengths

- High heating demand offers major decarbonisation impact from efficiency and fuel switching.

Weaknesses

- Limited data monitoring hinders comprehensive analysis and understanding of retail market dynamics.

Opportunities

- Efficiency upgrades and fuel switching in buildings can drive emission reductions.
- Biomethane could support heat decarbonisation without major infrastructure changes.

Threats

- Declining gas consumer base may increase costs for remaining consumers.
- Limited availability of low-carbon gases risks undermining the gas sector's contribution to the energy transition.

Gas country sheets 2024

LITHUANIA

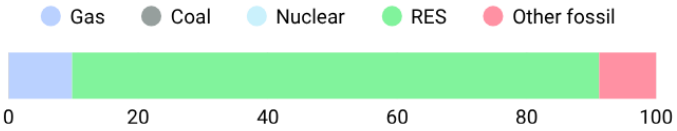
ACER
European Union Agency for the Cooperation of Energy Regulators

Competition & network metrics

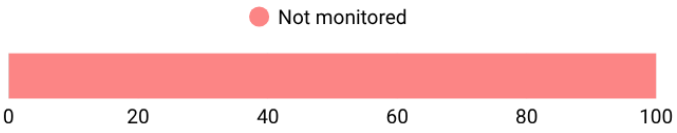
Consumers (mln)	0.61	0.08
Average demand (MWh)	3.8	552.6
Unit price (€c/kWh)	9.7 ↓ -52%	6.1 ↓ -26%
Concentration (HHI)	9,990	1,510
Nationwide suppliers	37 ↑ 36	4 ↓ -13
Switching	0% ↑ 0%	20.3% ↓ -0%

Transmission length (km)	2,288
Distribution length (km)	9,724

Share of gas for electricity generation



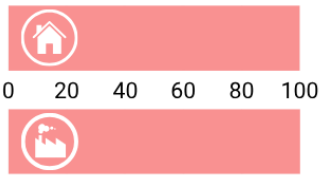
Breakdown of gas demand



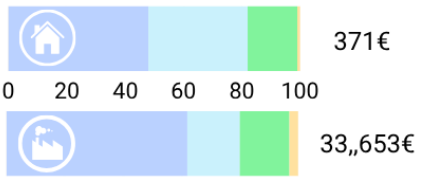
Total gas demand (TWh) 6.69

Consumer metrics

Contract uptake (%)

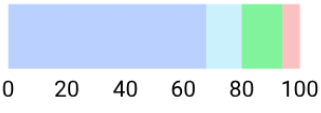


Bill breakdown (%) and annual expenditure

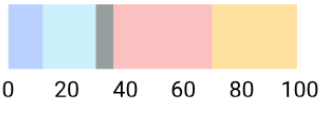


Household energy consumption

Usage



Share of fuels



Decarbonisation metrics

Biomethane production	0.71%
Demand change from 2022	-4.81%
Days where gas sets electricity price	158

Strengths

- High heating demand offers major decarbonisation impact from efficiency and fuel switching.

Weaknesses

- A more dynamic monitoring of the retail market enables faster awareness of and response to changing market dynamics.

Opportunities

- Efficiency upgrades and fuel switching in buildings can drive emission reductions.
- Biomethane could support heat decarbonisation without major infrastructure changes.

Threats

- Declining gas consumer base may increase costs for remaining consumers.
- Limited availability of low-carbon gases risks undermining the gas sector's contribution to the energy transition.

Gas country sheets 2024

LUXEMBOURG

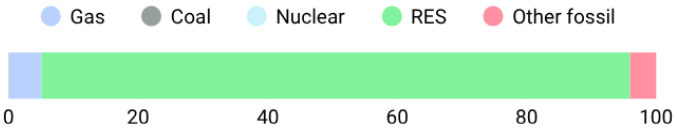
ACER
European Union Agency for the Cooperation of Energy Regulators

Competition & network metrics

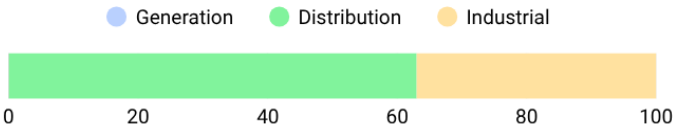
Consumers (mln)	0.08	0.01
Average demand (MWh)	26.3	395.5
Unit price (€c/kWh)	8.1 ↓-6%	9.5 ↓-14%
Concentration (HHI)	5,000	4,910
Nationwide suppliers	4 0	5 0
Switching	0.2% ↓-98%	0.5% ↓-2%

Transmission length (km)	N.A.
Distribution length (km)	N.A.

Share of gas for electricity generation



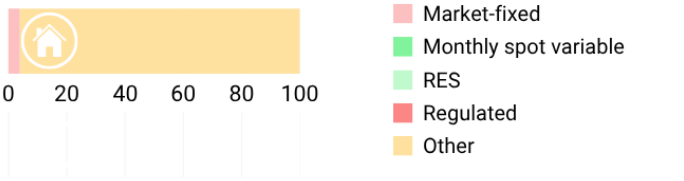
Breakdown of gas demand



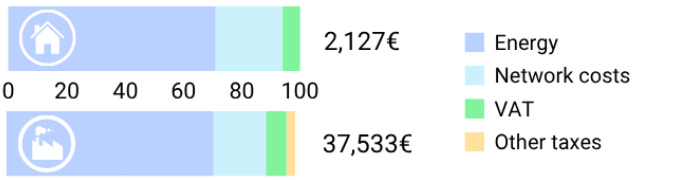
Total gas demand (TWh)	6.75

Consumer metrics

Contract uptake (%)



Bill breakdown (%) and annual expenditure



Household energy consumption

Usage

Share of fuels

Decarbonisation metrics

Biomethane production	N.A.
Demand change from 2022	-1.36%
Days where gas sets electricity price	N.A.

Strengths

- High heating demand offers major decarbonisation impact from efficiency and fuel switching.

Weaknesses

- A more dynamic monitoring of the retail market enables faster awareness of and response to changing market dynamics.

Opportunities

- Efficiency upgrades and fuel switching in buildings can drive emission reductions.
- Biomethane could support heat decarbonisation without major infrastructure changes.

Threats

- Declining gas consumer base may increase costs for remaining consumers.
- Limited availability of low-carbon gases risks undermining the gas sector's contribution to the energy transition.

Gas country sheets 2024

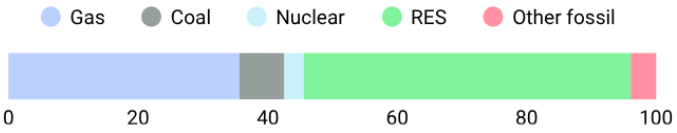
NETHERLANDS

ACER
European Union Agency for the Cooperation of Energy Regulators

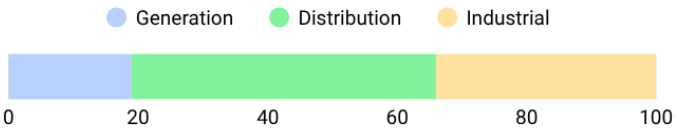
Competition & network metrics

Consumers (mln)	7.2	N.A
Average demand (MWh)	41.6	N.A.
Unit price (€c/kWh)	16.5 ↓ -5%	16.6 ↓ -10%
Concentration (HHI)	1,790	1,450
Nationwide suppliers	50 -6	50 -6
Switching	15.0% ↑ 25%	15.0% ↑ 25%
Transmission length (km)	12,000	
Distribution length (km)	125,000	

Share of gas for electricity generation



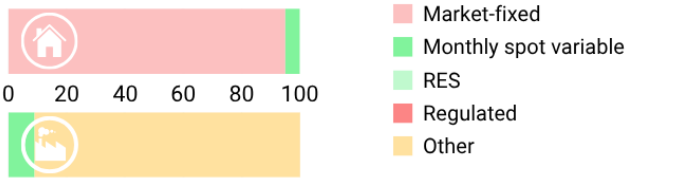
Breakdown of gas demand



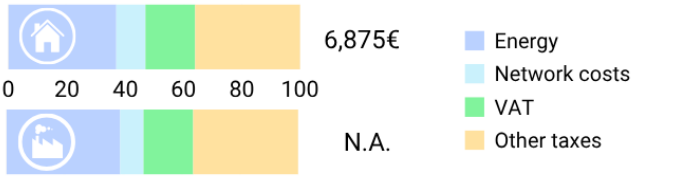
Total gas demand (TWh) 300.00

Consumer metrics

Contract uptake (%)



Bill breakdown (%) and annual expenditure



Household energy consumption

Usage

Share of fuels

Decarbonisation metrics

Biomethane production	N.A.
Demand change from 2022	-3.92%
Days where gas sets electricity price	123

Strengths

- High heating demand offers major decarbonisation impact from efficiency and fuel switching.

Weaknesses

- A more dynamic monitoring of the retail market enables faster awareness of and response to changing market dynamics.

Opportunities

- Efficiency upgrades and fuel switching in buildings can drive emission reductions.
- Biomethane could support heat decarbonisation without major infrastructure changes.

Threats

- Declining gas consumer base may increase costs for remaining consumers.
- Limited availability of low-carbon gases risks undermining the gas sector's contribution to the energy transition.

Gas country sheets 2024

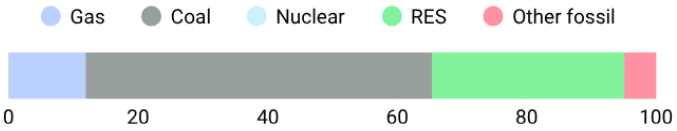
POLAND

ACER
European Union Agency for the Cooperation of Energy Regulators

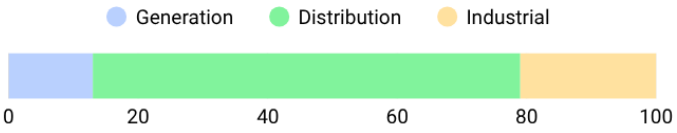
Competition & network metrics

Consumers (mln)	7.02	0.15
Average demand (MWh)	7.8	912.5
Unit price (€c/kWh)	N.A.	9.3 ↓ -4%
Concentration (HHI)	9,530	3,490
Nationwide suppliers	26 -10	82 ↑ 39
Switching	0.03% ↓ -72%	5.65% ↑ 29%
Transmission length (km)	12,820	
Distribution length (km)	222,034	

Share of gas for electricity generation



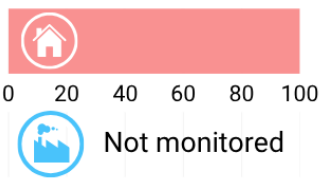
Breakdown of gas demand



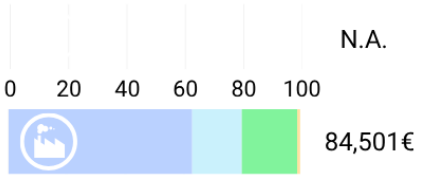
Total gas demand (TWh) 192.46

Consumer metrics

Contract uptake (%)

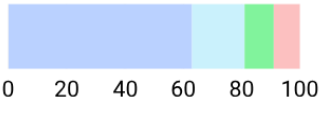


Bill breakdown (%) and annual expenditure

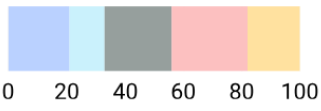


Household energy consumption

Usage



Share of fuels



Decarbonisation metrics

Biomethane production	N.A.
Demand change from 2022	13.65%
Days where gas sets electricity price	182

Strengths

- High heating demand offers major decarbonisation impact from efficiency and fuel switching.
- Developed LNG and infrastructure provides energy security and flexibility.

Weaknesses

- A more dynamic monitoring of the retail market enables faster awareness of and response to changing market dynamics.

Opportunities

- Efficiency upgrades and fuel switching in buildings can drive emission reductions.
- Biomethane could support heat decarbonisation without major infrastructure changes.

Threats

- Declining gas consumer base may increase costs for remaining consumers.
- Limited availability of low-carbon gases risks undermining the gas sector's contribution to the energy transition.

Gas country sheets 2024

PORTUGAL

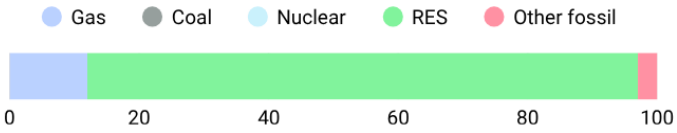
ACER
European Union Agency for the Cooperation of Energy Regulators

Competition & network metrics

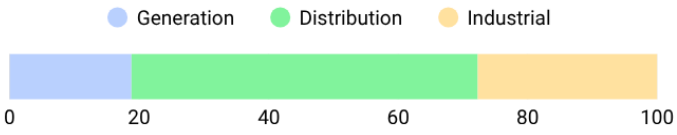
Consumers (mln)	1.48	0.09
Average demand (MWh)	2.3	336.4
Unit price (€c/kWh)	15.5 ↓-12%	9.2 ↓-15%
Concentration (HHI)	2,590	3,470
Nationwide suppliers	20 ↑2	21 ↑2
Switching	17.0% ↓-39%	N.A.

Transmission length (km)	1,375
Distribution length (km)	21,500

Share of gas for electricity generation



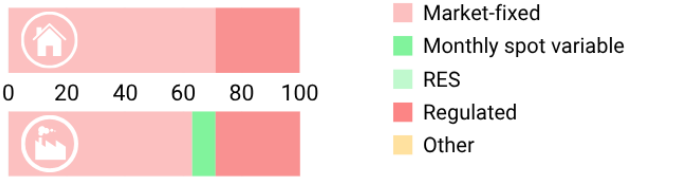
Breakdown of gas demand



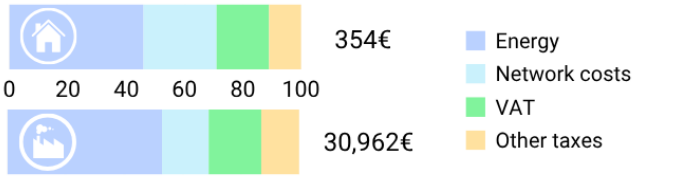
Total gas demand (TWh)	32.50

Consumer metrics

Contract uptake (%)



Bill breakdown (%) and annual expenditure



Household energy consumption

Usage

Share of fuels

Decarbonisation metrics

Biomethane production	N.A.
Demand change from 2022	-34.73%
Days where gas sets electricity price	110

Strengths

- Gas power generation used as a flexible back up source for renewable generation.
- Low reliance on gas by households could support electrification transition.

Weaknesses

- A more dynamic monitoring of the retail market enables faster awareness of and response to changing market dynamics.
- Regulated prices may represent a barrier to new supplier entry.

Opportunities

- Efficiency upgrades and fuel switching in buildings can drive emission reductions.
- Biomethane could support decarbonisation without major infrastructure changes.

Threats

- Declining gas consumer base may increase costs for remaining consumers.
- Limited availability of low-carbon gases risks undermining the gas sector's contribution to the energy transition.

Gas country sheets 2024

ROMANIA

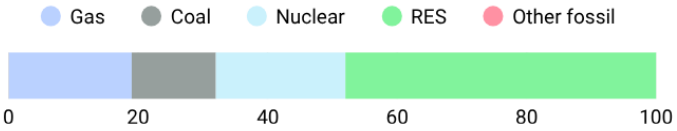
ACER
European Union Agency for the Cooperation of Energy Regulators

Competition & network metrics

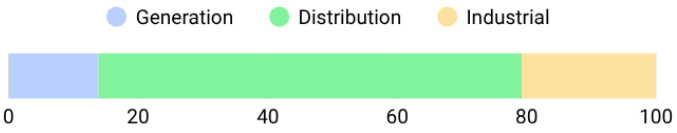
Consumers (mln)	4.46	0.22
Average demand (MWh)	7.7	266.3
Unit price (€c/kWh)	5.6 ↑ 1%	6.5 ↓ -12%
Concentration (HHI)	3,880	2,170
Nationwide suppliers	37 ↑ 1	52 ↓ -5
Switching	16.2% ↑ 18%	10.1% ↑ 85%

Transmission length (km)	14,745
Distribution length (km)	55,597

Share of gas for electricity generation



Breakdown of gas demand



Total gas demand (TWh)	92.39

Consumer metrics

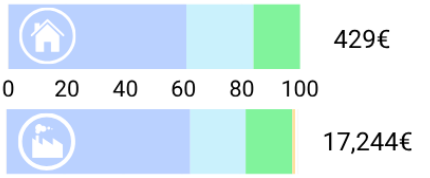
Contract uptake (%)

Not monitored

Not monitored

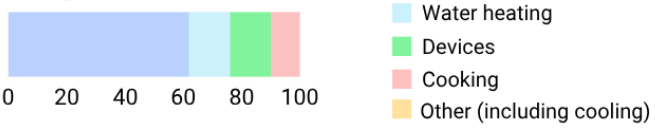
Market-fixed
Monthly spot variable
RES
Regulated
Other

Bill breakdown (%) and annual expenditure

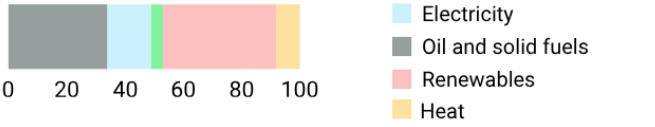


Household energy consumption

Usage



Share of fuels



Decarbonisation metrics

Biomethane production	N.A.
Demand change from 2022	-2.98%
Days where gas sets electricity price	183

Strengths

- High heating demand offers major decarbonisation impact from efficiency and fuel switching.

Weaknesses

- A more dynamic monitoring of the retail market enables faster awareness of and response to changing market dynamics.

Opportunities

- Efficiency upgrades and fuel switching in buildings can drive emission reductions.
- Biomethane could support heat decarbonisation without major infrastructure changes.

Threats

- Declining gas consumer base may increase costs for remaining consumers.
- Limited availability of low-carbon gases risks undermining the gas sector's contribution to the energy transition.

Gas country sheets 2024

SLOVAKIA

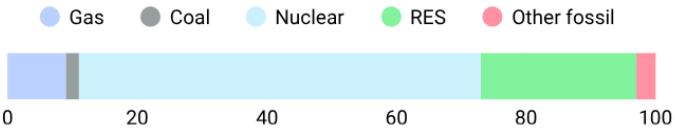
ACER
European Union Agency for the Cooperation of Energy Regulators

Competition & network metrics

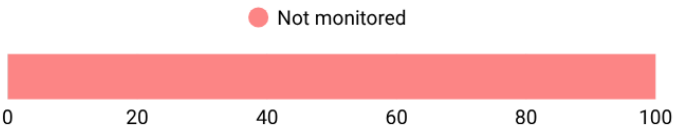
Consumers (mln)	1.44	0.08
Average demand (MWh)	8.9	443.1
Unit price (€c/kWh)	5.9 0%	9.7 ↓ -26%
Concentration (HHI)	6,460	4,330
Nationwide suppliers	10 ↑ 4	21 ↑ 10
Switching	0.8% ↑ 88%	N.A.

Transmission length (km)	2,270
Distribution length (km)	34,855

Share of gas for electricity generation



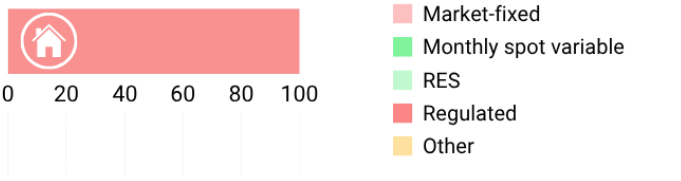
Breakdown of gas demand



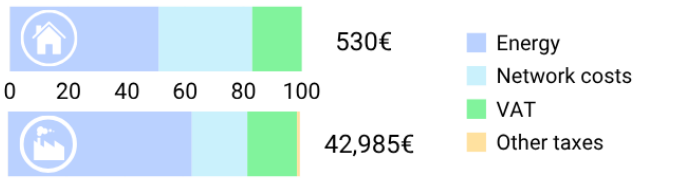
Total gas demand (TWh)	47.26

Consumer metrics

Contract uptake (%)

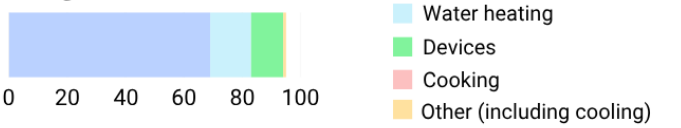


Bill breakdown (%) and annual expenditure

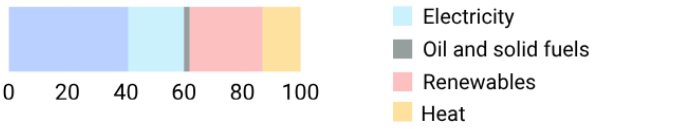


Household energy consumption

Usage



Share of fuels



Decarbonisation metrics

Biomethane production	N.A.
Demand change from 2022	-1.48%
Days where gas sets electricity price	167

Strengths

- High heating demand offers major decarbonisation impact from efficiency and fuel switching.

Weaknesses

- A more dynamic monitoring of the retail market enables faster awareness of and response to changing market dynamics.

Opportunities

- Efficiency upgrades and fuel switching in buildings can drive emission reductions.
- Biomethane could support heat decarbonisation without major infrastructure changes.

Threats

- Declining gas consumer base may increase costs for remaining consumers.
- Limited availability of low-carbon gases risks undermining the gas sector's contribution to the energy transition.

Gas country sheets 2024

SLOVENIA

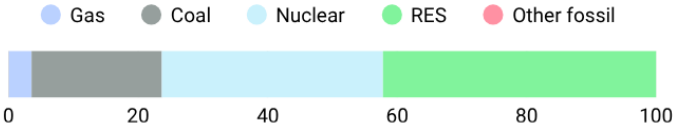
ACER
European Union Agency for the Cooperation of Energy Regulators

Competition & network metrics

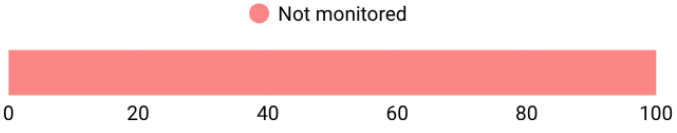
Consumers (mln)	0.13	0.01
Average demand (MWh)	8.6	755.2
Unit price (€c/kWh)	9.4 ↓ -9%	8.5 ↓ -19%
Concentration (HHI)	1,950	3,150
Nationwide suppliers	13 ↓ -2	19 ↕ 0
Switching	0.8 ↓ -27%	6.8% ↑ 6%

Transmission length (km)	1,195
Distribution length (km)	5,137

Share of gas for electricity generation



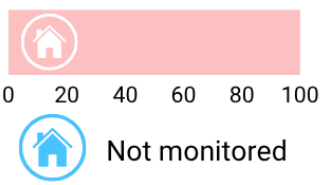
Breakdown of gas demand



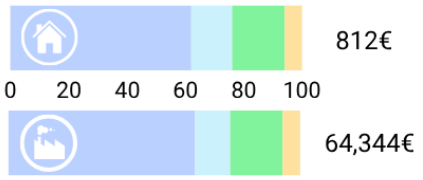
Total gas demand (TWh) 9.47

Consumer metrics

Contract uptake (%)

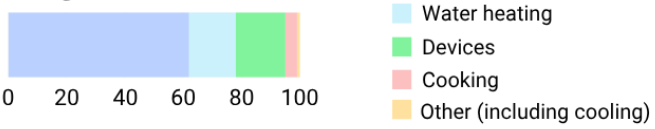


Bill breakdown (%) and annual expenditure

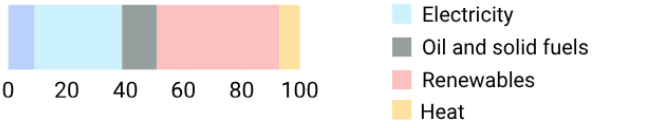


Household energy consumption

Usage



Share of fuels



Decarbonisation metrics

Biomethane production	0
Demand change from 2022	4.5%
Days where gas sets electricity price	162

Strengths

- High heating demand offers major decarbonisation impact from efficiency and fuel switching.
- Gas used as a flexibility back up to RES electricity generation.

Weaknesses

- A more dynamic monitoring of the retail market enables faster awareness of and response to changing market dynamics.

Opportunities

- Efficiency upgrades and fuel switching in buildings can drive emission reductions.
- Biomethane could support heat decarbonisation without major infrastructure changes.

Threats

- Declining gas consumer base may increase costs for remaining consumers.
- Limited availability of low-carbon gases risks undermining the gas sector's contribution to the energy transition.

Gas country sheets 2024

SPAIN

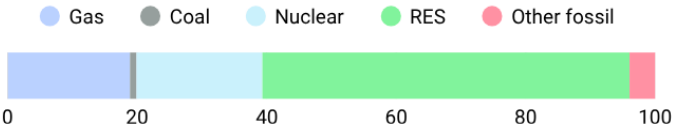
ACER
European Union Agency for the Cooperation of Energy Regulators

Competition & network metrics

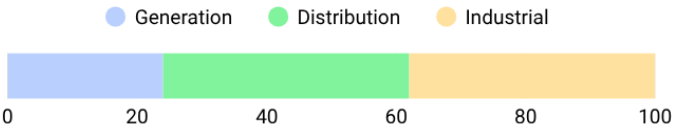
Consumers (mln)	7.90	0.78
Average demand (MWh)	3.9	3.5k
Unit price (€c/kWh)	12.4 2%	5.8 ↓-11%
Concentration (HHI)	2,650	1,160
Nationwide suppliers	123 ↑9	170 ↑37
Switching	18.9% ↓-26%	N.A.

Transmission length (km)	11,000
Distribution length (km)	95,000

Share of gas for electricity generation



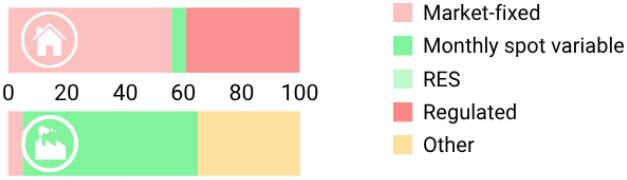
Breakdown of gas demand



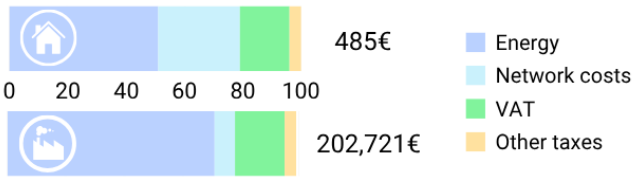
Total gas demand (TWh)	306.00

Consumer metrics

Contract uptake (%)



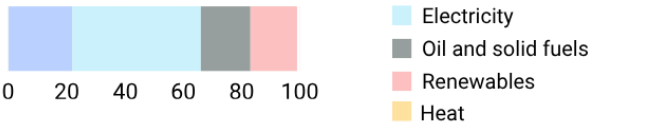
Bill breakdown (%) and annual expenditure



Household energy consumption

Usage

Share of fuels



Decarbonisation metrics

Biomethane production	0.1%
Demand change from 2022	-15.13%
Days where gas sets electricity price	110

Strengths

- Gas power generation used as a flexible back up source for renewable generation.
- High switching from consumers.

Weaknesses

- A more dynamic monitoring of the retail market enables faster awareness of and response to changing market dynamics.

Opportunities

- Efficiency upgrades and fuel switching in buildings can drive emission reductions.
- Biomethane could support heat decarbonisation without major infrastructure changes.

Threats

- Declining gas consumer base may increase costs for remaining consumers.
- Limited availability of low-carbon gases risks undermining the gas sector's contribution to the energy transition.

Methodology

Competition & network metrics

- **Consumers (mln)** - Refers to the total number of household and non-household gas consumers in each Member State, measured by the number of metering points.
- **Average demand** - Average demand is calculated by dividing total demand in the household/non-household sectors by the number of metering points in the given sector, as provided by the National Regulatory Authority.
- **Unit price (€c/kWh)** - Refers to the average cost paid by household and non-household consumers per kWh of gas consumed. This metric reflects the final price of gas, considering all components of the bill, such as the energy cost, network charges, taxes, and any applicable subsidies or discounts[1].
- **Concentration (HHI)** - The Herfindahl-Hirschman Index (HHI) is a common measure of market concentration and is used to determine market competitiveness. The index measures the size of companies relative to the size of the industry they are in and the amount of competitiveness. The HHI is calculated by squaring the market share of each firm competing in a market and then summing the resulting numbers. The HHI for the household sector is calculated based on the number of metering points, while for the non-household sector based on volumes. The index can range from zero to 10,000. Values below 2,000 represent a competitive market, between 2,000 and 4,000 a concentrated market, and values above 4,000 a highly concentrated market.
- **Switching** - Switching rates for the household sector are calculated based on the number of metering points that have switched suppliers in the calendar year. Switching rates for non-household consumers are calculated based on the volume of demand that has switched suppliers in the calendar year.
- **Transmission length (km)** - The total length (in kilometres) of the gas transmission network.
- **Distribution length (km)** - The total length (in kilometres) of the gas distribution network.

Share of gas for electricity generation; Gas demand

- **Share of gas for electricity generation** - Sourced from Ember and refers to the proportion of gas used for electricity generation. This indicator helps assess the dependency of power generation on gas and how this reliance is evolving in light of decarbonisation efforts and the increasing penetration of renewables. Following the methodology applied by Ember, solar includes both solar thermal and solar photovoltaic generation, and where applicable, distributed solar generation. Hydro generation excludes any contribution from pumped hydro generation. Bioenergy is classified under renewable. Other Fossil generation includes generation from oil and petroleum products, as well as manufactured gases and waste[2].
- **Breakdown of gas demand** - Sourced from ENaGaD and Eurostat, it refers to the share of total gas consumption attributed to different sectors and helps illustrate how gas demand is spread across various parts of the economy. These sectors include:
    - **Generation** - Gas used for electricity production.
    - **Distribution** - Gas supplied to both household and non-household consumers for heating, cooking, and other end uses.

[1] For Latvia, gas consumption band D2 was utilised.

[2] Ember Methodology v1.3

- **Industrial** - Gas consumed by large-scale industrial facilities for manufacturing and other industrial processes.

Contract uptake

- **Market-fixed** - Refers to fixed-price, fixed-term gas contracts where the price is determined through market competition. These contracts provide consumers with price stability over a set period, reflecting the dynamics of the competitive retail gas market.
- **Monthly spot variable** - Refers to gas contracts where the price changes monthly based on fluctuations in the wholesale gas market spot prices. These contracts offer consumers prices that reflect the short-term market conditions, with adjustments made each month according to changes in the wholesale market.
- **RES** - Refers to gas contracts that are linked to renewable energy sources (RES), such as biomethane or synthetic gas produced from renewable materials. These contracts ensure that the gas stems from sustainable, low-carbon sources, supporting the transition to a greener energy system.
- **Regulated** - Refers to gas contracts where the prices and/or terms are set or controlled by the National Regulatory Authority (NRA) or another designated authority.

Bill breakdown (%) and annual expenditure

- **Bill breakdown (%)** - Refers to the different components which make up the final gas price for households and non-households. The bill breakdown illustrates how the components of energy, network costs, VAT, and other taxes influence consumers' final gas price formation. Negative components, indicating subsidies which reduce the final price, are not shown in the figure as they do not account for consumer expenditure.
- **Annual expenditure** - Next to the bill breakdown, the annual expenditure of households and non-households is shown. This refers to the average amount of money consumers spend on gas per year in each country.

Household energy consumption

Usage

- **Space heating** - Refers to the share of energy used for heating indoor spaces in a household. This includes the energy consumed by heating systems.
- **Water heating** - Refers to the share of energy used to heat water for domestic use. This includes energy used in water heaters for activities such as bathing, showering, and washing dishes.
- **Devices** - Refers to the share of energy consumed by appliances and electronic devices for daily household operations, such as refrigerators, washing machines, televisions, and computers.
- **Cooking** - Refers to the share of energy used for cooking and preparing food, including the energy consumed by stoves, ovens, and other kitchen appliances.
- **Other (including cooling)** - Refers to the share of energy consumed by miscellaneous activities or appliances not categorised under the main energy uses listed above, such as lighting, cooling, entertainment, or other small household devices.

Share of fuels

- **Gas** - Refers to the share of energy supplied by natural gas, which is commonly used in households with gas heating systems.
- **Electricity** - Refers to the share of energy supplied by electricity, which can be used through various electric heating systems, including electric radiators, heat pumps, or underfloor heating.
- **Oil and solid fuels** - Refers to the share of energy supplied by oil-based products, such as heating oil, and by solid fuels, including coal, wood, or biomass. These fuels are commonly used in rural areas or in traditional heating systems such as wood stoves and coal-burning furnaces.
- **Renewables** - Refers to the share of energy that is directly derived from renewable sources, such as solar thermal, geothermal, or biomass. This category does not include renewable electricity used for heating purposes.
- **Heat** - Refers to the share of energy supplied through district heating systems, where heat is generated centrally and distributed to multiple buildings.

Decarbonisation metrics

- **Biomethane production** - Represents the share of biomethane produced as a percentage of total gas consumption.
- **Demand change from 2022** - Indicates the percentage change in energy demand compared to the year 2022.
- **Days where gas sets electricity price** - Refers to the number of days, calculated from hourly data, during which day-ahead electricity prices were equal to or above the cost of gas-fired power generation[3].

[3] Key developments in European electricity and gas markets (ACER, 2025).

List of sources

Competition & network metrics	
Indicator	**Data source**
Consumers (mln)	National regulatory authorities
Average demand (MWh)	National regulatory authorities
Unit price (€c/kWh)	Eurostat: nrg_pc_202 & nrg_pc_203
Concentration (HHI)	National regulatory authorities
Nationwide suppliers	National regulatory authorities
Switching	National regulatory authorities
Transmission and distribution length (km)	National regulatory authorities and ACER
Share of gas for electricity generation; Gas demand	
Indicator	**Data source**
Share of gas for electricity generation	https://ember-energy.org/data/yearly-electricity-data/
Breakdown of gas demand	ACER, EnaGaD, and Eurostat
Total gas demand (TWh)	National regulatory authorities
Consumer metrics	
Indicator	**Data source**
Contract uptake (%)	National regulatory authorities
Bill breakdown (%)	Eurostat: nrg_pc_202_c & nrg_ pc_ 203_c
Annual expenditure	Eurostat: nrg_pc_202_c & nrg_pc_203_c and national regulatory authorities
Consumption bands[4]	
Household consumers	**Non-household consumers**
Band D1: Less than 20 GJ	Band I1: Less than 10,000 GJ
Band D2: Between 20 and 199 GJ	Band I2: Between 50,000 and 49,999 GJ
Band D3: Between 200 and 2,000 GJ	Band I3: Between 50,000 and 99,999 GJ
	Band I4: Between 1000,000 and 249,999 GJ
	Band I5: Between 250,000 and 499,999 GJ
	Band I6: 50,000 GJ or over
Household energy consumption	
Indicator	**Data source**
Usage	Eurostat: nrg_d_hhq
Share of fuels	Eurostat: nrg_d_hhq
Decarbonisation metrics	
Indicator	**Data source**
Biomethane production	National regulatory authorities
Demand change from 2022	National regulatory authorities
Days where gas sets electricity price	ACER

[4] Further information regarding the consumption bands is accessible on Eurostat, for household and non-household consumers.