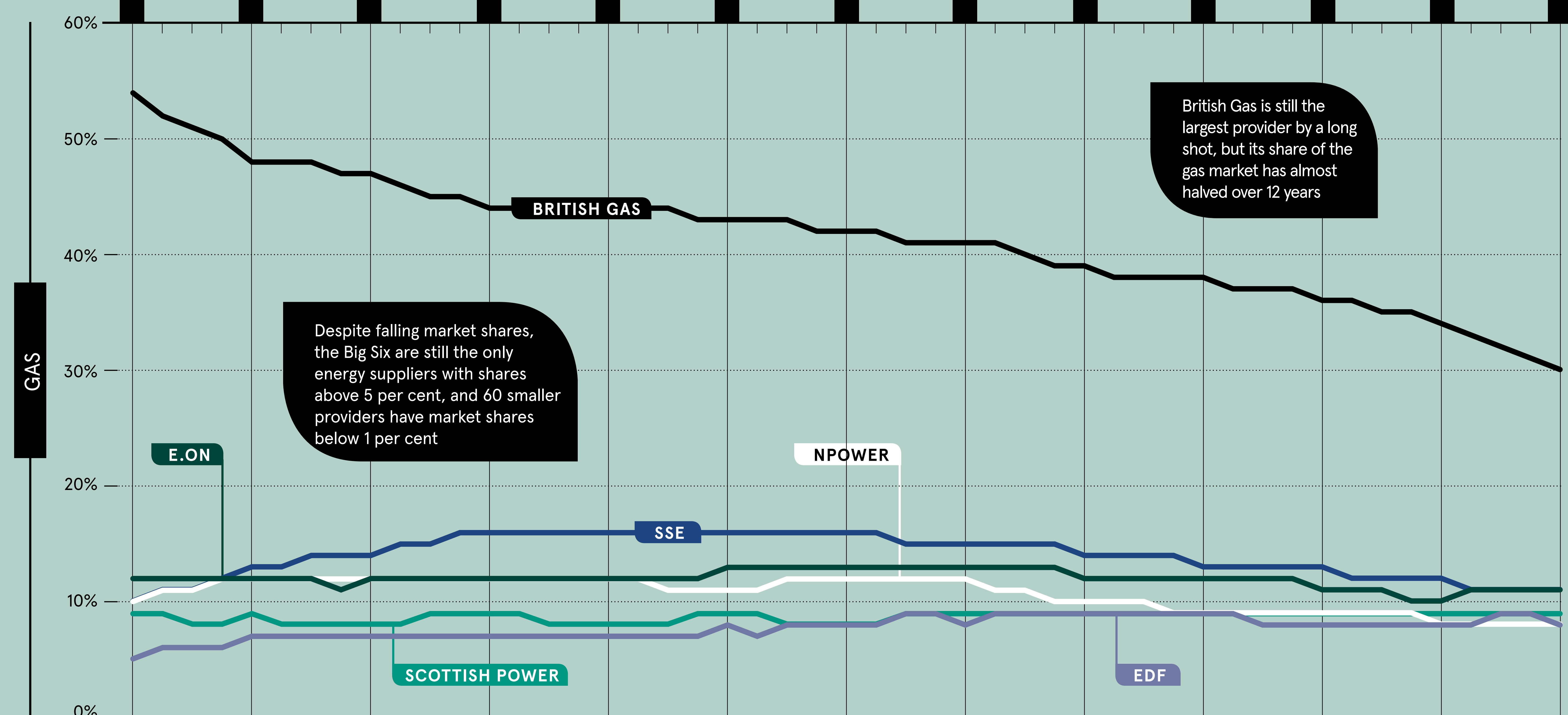
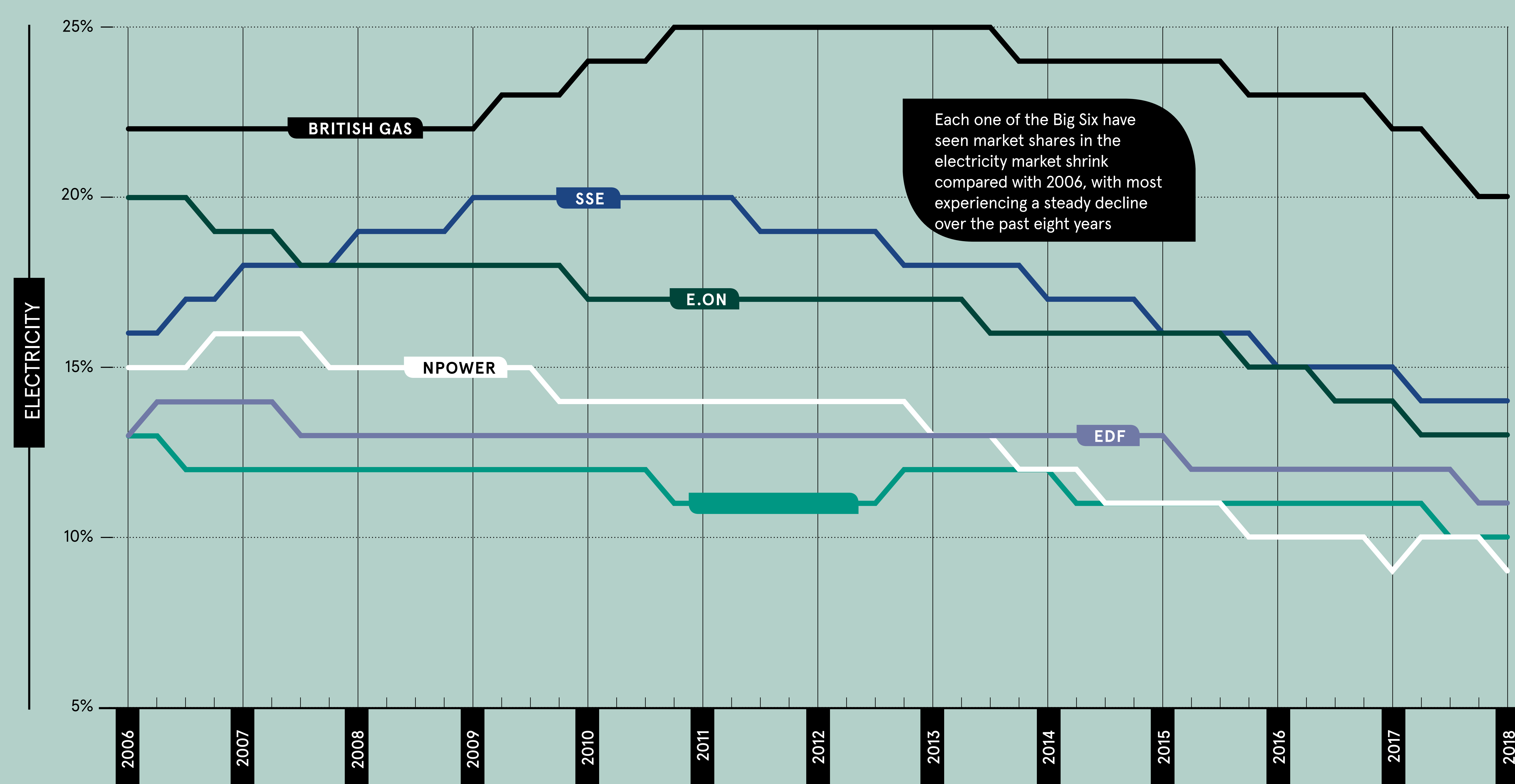


# BIG SIX BATTLES

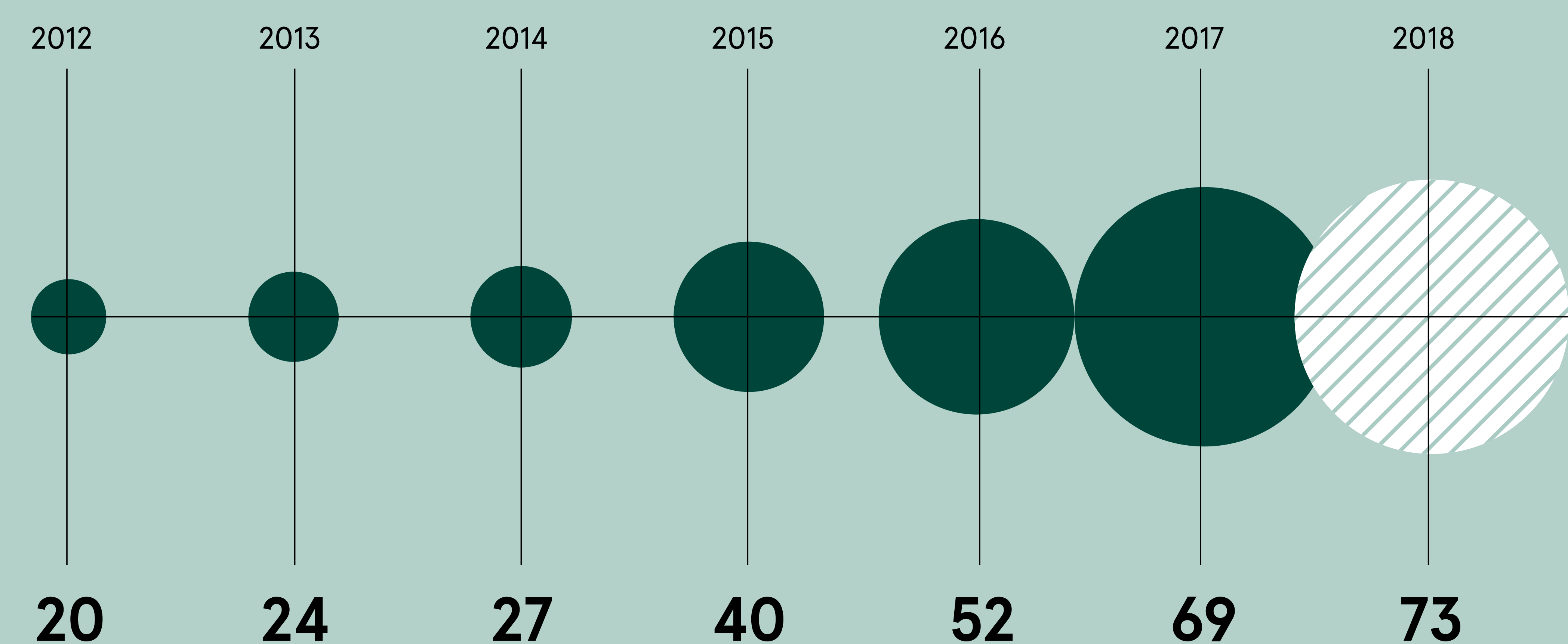
The six largest energy providers in the UK – British Gas, EDF Energy, E.ON, npower, Scottish Power and SSE – used to supply 100 per cent of the nation's electricity and gas back in 2004. However, recent years have seen market shares decline as new entrants have ramped up competition. With profits slipping and customers now able to switch easily between one of the now-73 domestic suppliers, dynamics in the energy market are beginning to change

## MARKET SHARES OF THE BIG SIX PROVIDERS, DOMESTIC RETAIL ELECTRICITY AND GAS (%)



## NUMBER OF ACTIVE SUPPLIERS

Supplier numbers at the end of each year, retail electricity and gas combined



19%

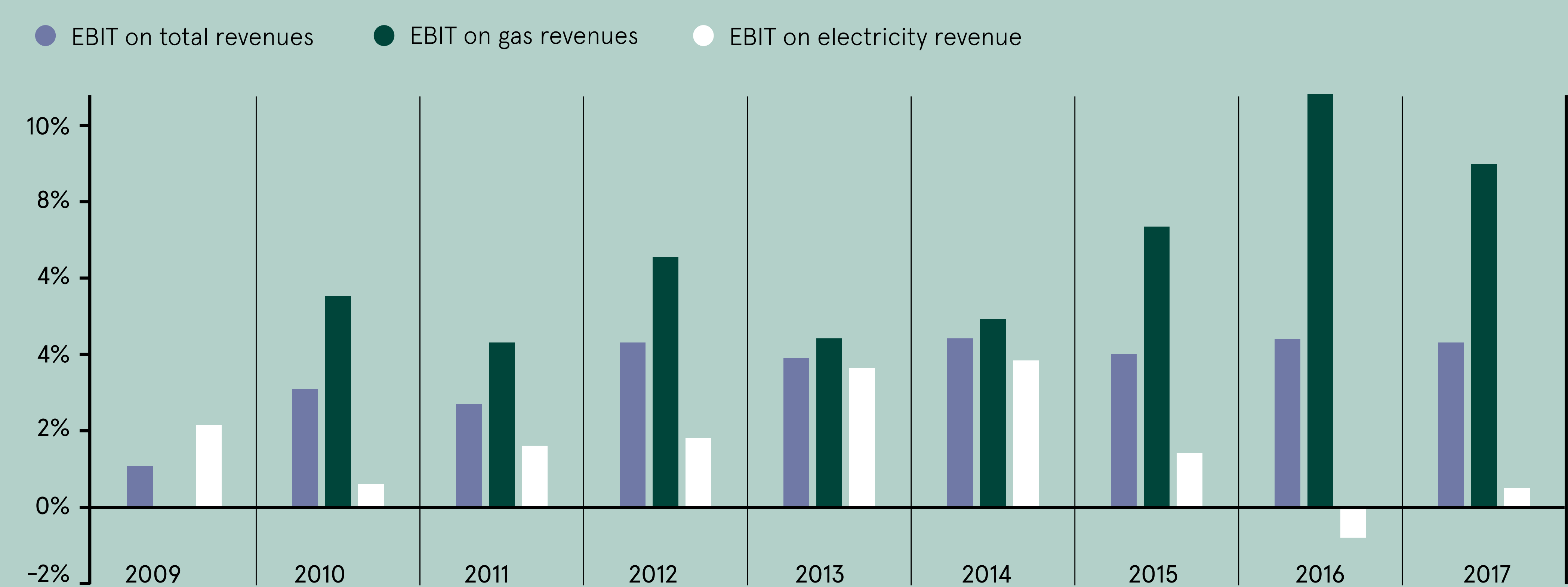
of consumers switched suppliers between July 2017 and June 2018, up from 17 per cent the year before

17%

drop in household energy consumption over the past 15 years, after adjusting for changes in temperature

## PROFIT MARGINS DIVERGE FOR ELECTRICITY AND GAS

Earnings before interest and tax (EBIT) as a percentage of sales for the Big Six combined

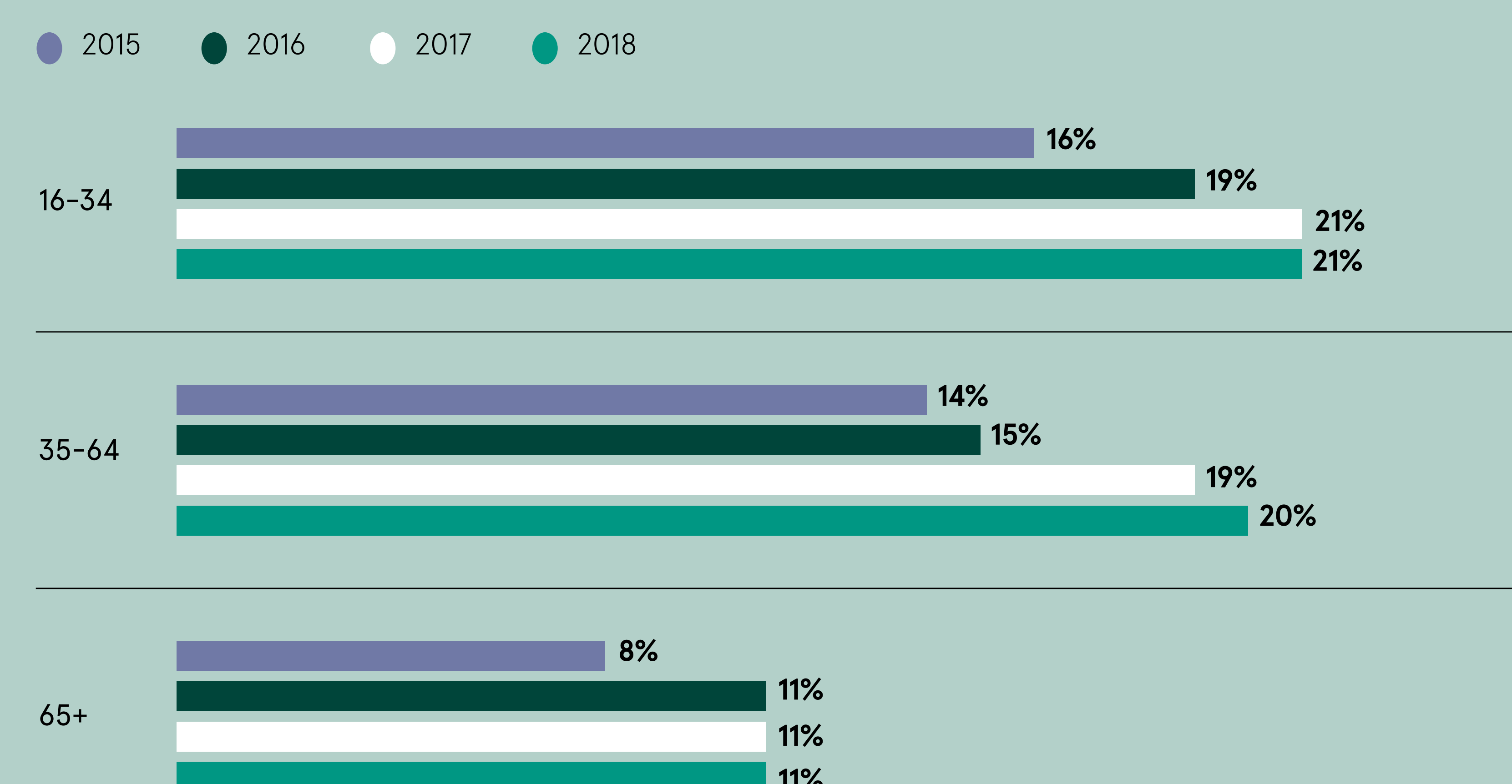


73

number of active licensed suppliers in 2018, up from just 13 in 2004

## SWITCHING RATES RISE AMONG YOUNGER CUSTOMERS

Percentage of the following age groups who have switched energy suppliers in the past 12 months



£320

approximate amount consumers on a standard variable tariff could save by switching to the cheapest tariff in the market in 2018, up from £300 in 2017

£1,117

average dual-fuel bill for customers of the Big Six in 2017, down £52 on the previous year

Sourced from Ofgem's latest available data