ENERGY REGULATION

Monitoring report 2025

Developments in the electricity and gas market

Bundesnetzagentur Bundeskartellamt

Offene Märkte | Fairer Wettbewerb

Monitoring report 2025 - Developments in the electricity and gas market

Table of content

Electricity

Electricity network overview

The network balance provides an overview of supply and demand in the German electricity grid in 2024. Supply comprised a total net electricity generation of 477.7 terawatt hours (TWh), including 11.8 TWh from pumped and battery storage and physical flows from other countries into Germany's general supply networks amounting to 80.6 TWh.
Demand comprised a total of 432.3 TWh of electricity delivered from the general supply networks to final customers. Consumption by industrial, commercial and other non-household customers totalled 284.7 TWh and by household customers 114.1 TWh. Consumption by pumped storage and battery storage amounted to 13.0 TWh. A total of 28.1 TWh of electricity was fed into networks not classed as general supply networks. Network losses amounted to 26.7 TWh, while physical flows from Germany's networks to other countries amounted to 54.4 TWh.

Electricity generation

Germany's electricity generation was slightly lower in 2024 than the year before.[1]
At 477.7 TWh, it was 1.1% down on the 2023 level.
The main reasons for the decline were mild weather conditions, higher imports because electricity was cheaper abroad, high primary energy prices and a slower economy.

- Generation by conventional power plants was down by 17.9 TWh (8.2%) to 199.3 TWh.
- By contrast, generation from renewable sources was up 12.5 TWh (4.7%) to 278.4 TWh.
- Generation from renewable energy thus accounted for 54% of gross electricity consumption.[2]
- Electricity generation by lignite power stations amounted to 72.7 TWh, down 9% on the previous year.
- Generation by hard coal-fired power plants totalled 24.1 TWh, down 30.3% year-on-year. The main reasons for this were likely the following: at the end of March 2024, the coal power plants that had not been decommissioned but transferred to the supply reserve as a result of the energy crisis in 2022 and 2023 were shut down. The lower natural gas wholesale prices, the weaker economy and the rise in generation from renewables also caused lower generation of electricity from coal-fired power stations.

[1] Electricity generation in the chapter on generation refers to net electricity generation, unless otherwise indicated.
[2] Where the share of generation from renewables in 2024 is taken to be about 59% or more, it is usually based on the "grid load" (as, for example, on the SMARD website).

- Electricity generation by natural gas power stations amounted to 67.5 TWh, 7.1% higher than the previous year. The increase in generation from natural gas was primarily due to the lower natural gas wholesale prices, which are likely to have improved the profitability of gas-fired power plants. The economic viability of gas-fired power plants benefits from the plants' flexibility in terms of being able to increase and decrease their output more quickly than coal-fired power plants. Another key reason was the fact that electricity was no longer generated from nuclear energy.

- Electricity generation by oil power stations was 3.6 TWh, the same as the year before.

- Solar generation achieved a significant increase (18.6%), thanks to strong growth in capacity.

- Onshore wind generation recorded a slight year-on-year decrease of 3.3%.
  Less electricity was generated especially during the autumn, which was not very windy.

- Hydropower generation returned to growth in 2024, up 13.2% following a dry 2023.

- Offshore wind generation also rose again, by 9.4% thanks to a moderate increase in capacity.

- A total of 238.0 TWh of renewable electricity was entitled to payments under the Renewable Energy Sources Act (EEG) in 2024, an increase of 0.9%.

Electricity generation capacity

The total installed generation capacity at the end of 2024 was 265.8 gigawatts (GW) (2023: 262.8 GW).[3] It comprised 88.0 GW of non-renewable and 177.8 GW of renewable capacity.

Figures under the EEG

Payments to renewable energy installation operators under the EEG increased year-on-year by 9.8% to €18.5bn. The average paid to operators under the EEG in 2024 was 8.0 cents per kilowatt hour (ct/kWh).[4] The volume-based share of all EEG payments attributable to feed-in tariffs has decreased steadily since 2010, falling to around 16% of renewable energy fed in under the EEG during 2024. The share attributable to EEG market premiums was 72%. The share accounted for by other forms of direct selling increased to 12%.

The development corridors laid down in law for biomass and solar were achieved in 2024. The installed capacity targets set for 2030 in the EEG 2023 and the Offshore Wind Energy Act (WindSeeG) are as follows: biomass 8.4 GW, solar 215 GW, onshore wind 115 GW and offshore wind 30 GW. However, higher growth in capacity, in particular in wind turbines, is needed to meet these expansion targets for 2030.

[3] This includes power plants not currently in the market, for instance plants in the grid reserve or those that have been temporarily shut down.

[4] The average EEG payment is calculated by dividing the total sum paid under the EEG in a year by the total amount of renewable electricity fed in during that year.

Auctions

Nearly all the auctions in 2025 were oversubscribed, resulting in strong competition in many cases. The continued upward trend in participation was observed in the onshore wind auctions. All the onshore wind auction rounds were oversubscribed in 2025.

There was also a high level of participation in the auctions for first-segment and second-segment solar installations. Nearly all the auctions since the beginning of 2023 have been considerably oversubscribed, with bid volumes totalling one and a half to three times the amount up for auction. The Bundesnetzagentur had issued determinations setting maximum prices for these auctions in order to improve framework conditions and promote competition. Although many auctions, especially first-segment solar, were heavily oversubscribed, there was a drop in the total submitted bid volume in 2025, from 4.8 GW in December 2024 to 2.8 GW in July 2025. In June 2025, an auction for second-segment solar installations was undersubscribed for the first time since February 2023; it had a volume of 283 megawatts (MW) and received 274 MW of bids.

The two innovation auctions were clearly oversubscribed in 2025. Both rounds received bids totalling more than 2 GW, making them oversubscribed by more than four times. The trend already observed with ground-mounted installations thus continues. As in previous auctions, the vast majority of the bids were for combinations of solar installations and storage facilities.

The April biomass auction was almost three times oversubscribed. The trend reversal in this sector that began in 2023 strengthened, with constantly oversubscribed auctions, one of the likely reasons being the Bundesnetzagentur's determination setting maximum prices. No bids were again submitted in the auctions for biomethane installations.

In the auctions for offshore wind, offshore sites with a total capacity of 8,800 MW (split between seven sites in the North Sea and one in the Baltic Sea) were awarded in 2023 and 8,000 MW (at five sites in the North Sea) were awarded in 2024.

Three North Sea sites with a total of 3,500 MW were up for auction in 2025. One 1,000 MW site, which had not been subject to a pre-investigation by the Federal Maritime and Hydrographic Agency (BSH) to analyse the marine environment, seabed, and wind and oceanographic conditions, was awarded in a dynamic bidding procedure in June 2025. It was not possible to award two sites of 2,000 MW and 500 MW respectively examined by the BSH with a deadline of 1 August 2025 as they did not receive bids.
The dynamic online auction proceedings were used for the third time in 2025 and went smoothly and successfully.

Current power plant capacity

The installed generation capacity in Germany's general supply networks as at 3 November 2025 amounted to 273.8 GW (net), including 13.2 GW of capacity outside the electricity market.

Expected new capacity and closures

A total of 3.6 GW of new conventional generation capacity is expected to be installed by 2028.[5] On the other hand, 5.7 GW of capacity is due to be taken out of operation.

Combined heat and power (CHP) plants

CHP plants generated 53.1 TWh of electricity in 2024 (down 0.4 TWh). Non-CHP electricity increased by 9.0 TWh to 97.8 TWh. The total amount of useful heat generated was 117.7 TWh (down 4.1 TWh). The primary energy source for the generation of electricity and useful heat in 2024 was natural gas, accounting for 36.8 TWh of the total electricity and 60.2 TWh of the total useful heat produced. By contrast, the primary energy source for the generation of non-CHP electricity was lignite, which accounted for 69.6 TWh.

The installed electrical capacity of the CHP plants decreased in 2024 by 0.5 GW to 28.6 GW. The useful heat capacity dropped by 1.0 GW to 54.5 GW. Natural gas is by far the most important energy source for CHP plants. It is used to fuel plants with a total installed electrical capacity of 17.7 GW and a total useful heat capacity of 27.9 GW.

Market concentration

Market shares are often a useful and suitable indicator of market power, including in electricity retail markets. In the market for the first-time sale of electricity, however, market shares are only a starting point for analysing market dominance.

Electricity generation

The shares of the market for domestic conventional electricity generation revealed a mixed picture in 2024. The combined market share (concentration ratio 5, CR5) of the five largest companies by sales (in the period under review RWE, LEAG, EnBW, Uniper and Vattenfall) on the market for the first-time sale of electricity in terms of generation volumes was 54.7%, down from 61.3% in 2023. The share of the five largest suppliers in Germany's conventional generating capacity at the end of 2024 was a combined 54.4% and thus higher than the previous year's level of 52.6%. The gap between the CR5 by volume and the CR5 by capacity has thus narrowed. These shares do not, however, reflect the growth in companies' market power as a result of power plant closures. The steep drop of 14.1 GW in the conventional capacity available on the market is above all because of the return to the original coal phaseout plan. This huge reduction in controllable capacity led to a correspondingly large increase in the market power of the leading electricity producers.

[5] The new capacity only includes electricity generating plants that are currently in trial operation or under construction with a net rated capacity of 10 MW or more per site. In such cases, the probability of projects being implemented is considered to be sufficiently high.

EEG electricity

In terms of the volume of electricity generated entitled to payments under the EEG, the share of the five largest companies by sales (EnBW, RWE, Ørsted, E.ON, Vattenfall) in the German market area in 2024 was about 8.4%. In 2023 it had been about 6.8%, but that included Uniper instead of Ørsted.

Market power report

Another decisive parameter for assessing market power in the field of electricity generation is the pivotality or residual supply index (RSI) analysis made in the Bundeskartellamt's market power report to determine the extent to which a company's power plant fleet is indispensable for meeting the demand for electricity. The pivotality analysis directly reflects the effect of decommissioning power stations on increasing market power. The main finding of the latest analyses is that, as a result of the closures, RWE's pivotality is again far above the threshold used by the Bundeskartellamt to presume a market-dominating position. The results for LEAG are just above this threshold, while EnBW is in third place in the proportion of pivotal periods.

Background and outlook

The remaining controllable power plant capacity of the major German electricity producers is likely to grow further in competitive significance for covering demand given the planned reduction in non-volatile power plant capacity that had already been partially implemented by the time this report was published. Towards the end of the reporting period and afterwards, a total of about 11.4 GW of non-volatile power plant capacity was shut down (again), the majority of it because of the expiry of the Maintenance of Substitute Power Stations Act (EKBG) and decommissioning relating to the phaseout of coal. By 2026 the net power plant capacity is expected to be down by another around 4.4 GW. This development will in itself increase the extent of indispensability of the remaining non-volatile power stations of the major producers. It is not yet clear how this growth in market power can be offset in the coming years by growth in wind power, solar installations and battery storage.

Electricity retail markets

As in previous years, the Bundeskartellamt assumes for 2024 that there is no single dominant undertaking in the two largest electricity retail markets. In 2024, the four largest companies by sales (currently E.ON, RWE, EWE and Enercity) on the national market for the supply of interval-metered customers sold a total of about 55 TWh. Their cumulative market share was approximately 24%. In 2023, they sold 49 TWh and their market share was 22%. In 2024, the cumulative sales of the four largest companies (currently E.ON, EnBW, Vattenfall and EWE) on the national market for the supply of standard load profile (SLP) customers on special contracts (non-default contracts and excluding heating electricity) amounted to about 43 TWh, compared to 41 TWh for the same companies in 2023. The CR4 on this market in 2024 was about 39%, compared to about 38% in 2023. The CR4 in both markets is still well below the statutory threshold for presuming (joint) market dominance (section 18(4) and (6) of the Competition Act (GWB)).

With regard to the supply of SLP customers on default contracts, for which regional markets are defined, the local default suppliers each have a monopoly in their individual supply/network area. The cumulative sales of the four largest companies across all default supply areas in Germany (again currently E.ON, EnBW, Vattenfall and EWE) are used to approximate the market position of the providers with the highest sales of electricity in default supply. These amount to about 12 TWh of the total amount of electricity sold under default contracts of around 27 TWh; this corresponds to a (hypothetical) nationwide share of about 44%, compared to about 45% in 2023.

With regard to the supply of customers with heating electricity, for which regional markets are also defined, the four largest companies (currently E.ON, EnBW, Vattenfall and Lichtblick) still have a relatively strong position both in a large number of individual supply areas and across all supply areas. The market position of those providers with high sales in heating electricity is also approximated by adding up the cumulative sales of the four largest companies across all supply areas in Germany.[6] The (also hypothetical) nationwide share in 2024 amounted to about 57% compared to about 58% in 2023.

Network structure data

The circuit length at transmission system operator (TSO) level amounted to 38,400 kilometres (km) in 2024.[7] The total number of final customer market locations in the TSOs' networks was 222. All of these market locations are interval-metered. As at 31 December 2024, the distribution system operators' (DSO) total circuit length at all network levels was about 1.9mn km. The total number of final customer market locations in all the DSOs' network areas was about 53mn. The majority of the DSOs included in the data analysis (626, 76%) have short to medium length networks (underground and overhead cables) of up to 1,000 km. The majority of the electricity network length is thus divided among 193 undertakings. The annual peak load of 75.8 GW was registered on 15 January 2024 between 11.30am and 11.45am (2023: 73.7 GW on 4 December between 5.15pm and 5.30pm). The annual peak load is the highest simultaneous demand for electrical capacity in a calendar year from the general supply networks. It comprises the total consumption of all connected consumers including line losses.

Network expansion

Current status of expansion in the transmission networks

As at 31 December 2024, 128 projects with a total length of approximately 16,832 km were listed in the Federal Requirements Plan Act (BBPlG) and the Power Grid Expansion Act (EnLAG): 34 projects had already been completed and another 19 had been at least fully approved; 66 projects were still at the approval stage; and nine projects were waiting for submission of the initial applications for federal sectoral planning or spatial impact assessment.

[6] Germany-wide market shares merely serve as illustrations of market conditions. The Bundeskartellamt's decision-making procedures concerning the supply of customers with heating electricity are based on a regional (network area-related) market definition.

[7] The four TSOs, Baltic Cable, TenneT's offshore holding companies and 819 DSOs took part in the data survey for the Monitoring Report 2025.

The total length of the EnLAG and BBPlG projects was made up as follows: (inc changes compared with Q3 2024):

- about 881 km were about to start the approval procedure (-451 km);
- about 1,120 km were in the federal sectoral or spatial planning procedure/in the spatial impact assessment (-151 km);
- about 7,850 km were in or about to start the planning approval or notification procedure (-87 km);
- 3,747 km had been approved and were under or about to start construction (+564 km);
- 3,234 km had been completed (+149 km).

The total length of the EnLAG projects as at 31 December 2024 was some 1,808 km, made up as follows (inc change compared with Q3 2024):

- about 8 km were in the spatial planning procedure (+/-0 km);
- about 11 km were in or about to start the planning approval procedure (+/-0 km);
- 226 km had been approved and were under or about to start construction (-3 km);
- 1,563 km had been completed (+3 km).

The total length of the BBPlG projects as at 31 December 2024 was some 15,024 km, made up as follows (inc change compared with Q3 2024):

- about 881 km were about to start the approval procedure (-451 km);
- about 1,112 km were in the federal sectoral or spatial planning procedure/in the spatial impact assessment (-151 km);
- about 7,839 km were in or about to start the planning approval or notification procedure (-87 km);
- 3,521 km had been approved and were under or about to start construction (+567 km);
- 1,671 km had been completed (+146 km).

TSOs' future grid expansion requirements

In the Network Development Plan (NDP) 2023-2037/2045, the TSOs identified the planned onshore measures for reinforcing and expanding the transmission system that had not yet been included in the Federal Requirements Plan Act (BBPlG). They are planning new lines and network reinforcements totalling about 7,850 km by 2045, of which 1,250 km will be new alternating current (AC) lines, 3,550 km new direct

current (DC) lines, 2,550 km AC reinforcements and 500 km DC interconnectors. There are no AC interconnectors planned for this period beyond those included in the BBPlG.

DSOs' future grid expansion requirements
The DSOs required to conduct network expansion planning in accordance with section 14d EnWG published their network expansion plans on their internet platform www.vnbdigital.de on 30 April 2024 and informed the Bundesnetzagentur accordingly. All DSOs except for those exempt under section 14d(8) EnWG have to produce and submit network expansion plans. The 82 obligated network operators in the 2024 survey cover 100% of the high-voltage level and about 80% of the medium and low-voltage levels. For network dimensioning the 82 DSOs are anticipating projects requiring the investment of around €110bn by 2033. Some of these projects are already underway. By 2045 network dimensioning needs will increase to around €207bn. Pure replacement investments and dismantling/disposal are not included in these figures. According to the DSOs, these costs will total around €15bn by 2033 and around €30bn by 2045. The regional scenarios for 2025 are currently being prepared at the planning region level and have to be published by the planning regions on www.vnbdigital.de by 31 December 2025.

Investments by electricity network operators
In 2024, investments in and expenditure on network infrastructure by the network operators amounted to about €29,653mn (2023: €19,588mn) (both values under commercial law). The total comprised €12,367mn of investments and expenditure by the DSOs and €17,286mn by the four TSOs. Investments by the TSOs in 2024 were up by around 90% on the previous year (2023: €8,675mn, 2024: €16,510mn), while investments by the DSOs were up 24% in the same period (2023: €7,179mn, 2024: €8,909mn). Of the total investment and expenditure, 89% was made by 14% of the DSOs (115 out of 819).
Both the TSOs and the DSOs again planned higher investments for 2025.

Electricity supply disruptions

For the year 2024, 830 network operators reported 164,645 interruptions in supply at low and medium-voltage level to the Bundesnetzagentur. This is an increase of 6,300 interruptions compared to the year before. Nevertheless, the average duration of an interruption in supply per final customer has reduced slightly and supply interruptions have been corrected faster. The System Average Interruption Duration Index (SAIDIEnWG) of 11.7 minutes per year per connected final customer for the low and medium-voltage levels is below the previous year's average of 12.8 minutes. The reliability of supply remained at a high level in 2024.

Electricity network tariffs

The volume-weighted network tariffs for 2025 are 10.72 ct/kWh for household customers with an annual consumption of between 2,500 kWh and 5,000 kWh. This equates to a slight drop of 2% from the previous year (2024: 10.95 ct/kWh). Tariffs for non-household customers were down in 2025. The network tariffs for

commercial customers decreased by about 5% to 8.49 ct/kWh (2024: 8.92 ct/kWh). For industrial customers they also dropped by about 2% to 4.14 ct/kWh (2024: 4.21 ct/kWh).

Distribution network tariffs were lower in 2025 than in 2024. The main reason for the decrease is the Bundesnetzagentur's determination on distributing the additional costs incurred in networks as a result of the integration of renewable energy generating installations (BK8-24-001-A), which led to about €2.4bn of reductions for 178 DSOs.[8] This provides relief for regions with a particularly high burden of costs from renewable energy expansion from 2025 onwards. Eligible DSOs can finance some of their network costs from a national charge. The network tariffs of DSOs in the network areas passing on costs are thus lower. The average household (with an annual consumption of 3,500 kWh) in a region benefiting from a reduction in the cost burden will see a decrease in the network tariffs of in some cases more than €200 in 2025 compared with 2024.

The amount that can be passed on is distributed across the country via the "surcharge for special network use" (previously section 19 StromNEV surcharge). The surcharge for 2025 will be 1.558 ct/kWh compared to 0.643 ct/kWh in 2024; about 60% of it will cover the costs of distributing the renewable energy network costs. This will add about an extra €33 a year to electricity bills for household customers with an annual consumption of 3,500 kWh.

Overall, the costs of the transmission system are higher in 2025 while consumption is slightly lower, so the TSO tariffs are higher overall. However, there are very varied developments in the different voltage levels. The TSO tariffs for customers connected to the extra-high voltage network are lower in 2025 than in 2024, whereas the network tariffs for customers connected to the high-voltage transformation level are higher. This divergent trend in the voltage levels is due to the fact that the consumption relevant to settlement in the transformation level is falling but it is increasing in the extra-high voltage network. There were also adjustments to the methodology of the allocation of costs to the voltage levels.

Electric vehicles/charging stations/load control

Electric vehicles/charging stations

Publicly accessible electric vehicle charge points must meet certain minimum technical requirements. The operators of charging infrastructure accessible to the public have to notify the Bundesnetzagentur of their infrastructure so that compliance with the requirements can be checked as set out in the Charging Station Ordinance (LSV). In 2024, the number of publicly accessible electric vehicle charge points rose by nearly 25%. At the end of 2024, more than 163,000 publicly accessible charge points with a total power of 6.2 GW were in operation. The Bundesnetzagentur regularly publishes comprehensive data on this topic at https://www.bundesnetzagentur.de/ladeinfrastruktur (in German).

[8] https://www.bundesnetzagentur.de/DE/Fachthemen/ElektrizitaetundGas/Aktuelles/VerteilungNetzkosten/start.html

Load control

Section 14a EnWG gives DSOs at the low-voltage level the ability to use consumers' flexibility to avoid localised overloading. DSOs conclude agreements with final customers with controllable devices such as heat pumps, private electric vehicle charge points and night storage heaters allowing the DSOs to control the consumption of the devices in return for a reduced network tariff. Up to and including 2023, this kind of agreement between a network operator and an operator of a controllable consumer device was voluntary. Operators of 1,918,573 controllable consumer devices entered into one. Since 1 January 2024, it has been mandatory for controllable consumer devices to be controllable by network operators at the low-voltage level (determination on the integration of controllable consumer devices and controllable network connections in accordance with section 14a EnWG). DSOs notified the Bundesnetzagentur in the monitoring survey of 264,874 market locations with controllable consumer devices that came under the new rules as at 31 December 2024. The network operators settled 239,825 of these as module 1 and 25,049 as module 2.

System services

Costs for system services

The net costs for system services, which are passed on to final customers, remained stable in 2024 at about €5.2bn.

The largest cost items were:

- congestion management (redispatching with operational and reserve power plants and countertrading) at about €2.9bn (2023: €3.3bn),
- loss energy at €1.6bn (2023: €1.3 bn) and
- contracting frequency containment reserves (FCR), automatic frequency restoration reserves (aFRR) and manual frequency restoration reserves (mFRR) at a total of €0.5bn (2023: €0.6bn).

Congestion management

The total volume of congestion management measures (redispatching with operational and reserve power plants and countertrading) in 2024 was around 30,320 GWh, down 12% on the previous year (2023: 34,298 GWh).

Further details and background information on congestion management are available at www.smard.de.

Balancing services

The annual average volume of FCR tendered in 2024 decreased slightly to 564 MW (2023: 570 MW). The downwards trend of aFRR and mFRR seen in recent years largely continued with the exception of positive aFRR, whose average volume tendered was 1,941 MW, slightly above the previous year's figure of 1,923 MW. The average volume of negative aFRR tendered in the year was 1,817 MW (2023: 1,842 MW). The average

volume of positive mFRR tendered was 603 MW (2023: 681 MW) and the average volume of negative mFRR tendered was 364 MW (2023: 372 MW).

The average monthly volume of aFRR and mFRR used in 2024 was lower as well. Comparing the calendar months with those of the previous year shows mostly lower usage with the exception of May and June, when the average was slightly higher than the year before. The highest average monthly figure was for June but, at 157 MW, it was 25 MW lower than in April 2023, the peak month of the year before.

The average volume-weighted imbalance price in the case of a short portfolio was €225.97 per megawatt hour (MWh), about 6% lower than a year before. The average volume-weighted imbalance price in the case of a long portfolio was negative €26.42/MWh (2023: negative €38.73/MWh).

Cross-border electricity trade

After 2023, the first year in which electricity imports exceeded exports, Germany remained a net importer of electricity in 2024 as well. Cross-border trade volumes for electricity amounted to 102.5 TWh (2023: 90.5 TWh), comprising 37.6 TWh of exports and 64.9 TWh of imports. Although wholesale prices dropped again compared to 2023, the volume effect meant that import costs rose in 2024 to €6,167mn (2023: €5,462mn), while export revenues fell to €2,118mn (2023: €3,070mn). The influence of volumes of electricity traded on costs and revenues was thus greater than the mere price change.

Wholesale electricity markets

There was a clear increase in trading volume on the electricity wholesale markets and especially on the futures market in 2024. This may be attributed both to a growing number of traders and to the type of trading. The increasing use of algorithms to submit bids to the trading system is leading to greater liquidity in the order books. The rise in trading volume was more evident in the traditional exchange trading than in over-the-counter (OTC) trading, although the tendency towards larger trading volumes was evident in the latter, too. Average prices in the electricity wholesale markets were down year-on-year in 2024. The average spread in electricity prices was lower as well but with a few very high values.

Spot market trading volumes

There was an increase of 22% to about 297 TWh in the trading volume of the coupled day-ahead midday auctions (classed as spot market trading). The total trading volume comprised 264 TWh on EPEX SPOT, 27 TWh on Nord Pool and 6 TWh on EXAA. The volume of the independent day-ahead 10.15am auctions on EXAA for the German bidding zone amounted to 1.4 TWh in 2024.

The trading volume on the intraday market also saw significant growth of 21% year-on-year to 126 TWh, of which 102 TWh were on EPEX SPOT and 24 TWh on Nord Pool, both of them overwhelmingly in continuous intraday trading.

Futures market trading volumes

Volumes in on-exchange futures trading increased more than 87% year-on-year for the second time in a row, resulting in a 2024 trading volume of 3,170 TWh for German Power Future. One possible reason is the increasing number of registered electricity traders on the exchanges. The number of traders rose by nearly 37% in 2024 on EEX alone. Moreover, the use of algorithms to submit bids to the trading system is becoming more widespread, leading to greater liquidity in the order books. The growth in trading volume for German Power Future mainly affects contracts for 2024 and 2025 as the fulfilment year. There was a reduction in volume for long-term contracts of four years and more, but these only make up a relatively small proportion of trading.

Volumes traded off-exchange via broker platforms also recorded increases. The total volume traded by the eight participating brokers in 2024 amounted to about 3,618 TWh compared to 2,961 TWh in 2023. Developments in trading volumes can also be followed through the London Energy Brokers' Association (LEBA), although it does not represent all broker platforms surveyed. There was an increase in the volume of transactions brokered by LEBA members. The trading volume for German Power brokered by LEBA members increased by about 27% from 2,726 TWh in 2023 to 3,458 TWh in 2024.[9]

The volume of OTC clearing of German Power Future on EEX increased by about 36% in 2024 to 2,682 TWh. The total on-exchange trading volume for German Power Future was 3,170 TWh, surpassing the OTC clearing volume for the first time since 2018.[10] There was also an increase in the volume registered for clearing with LEBA. The registered volume for German Power in 2024 was about 2,787 TWh, about 81% of the total OTC volume brokered by LEBA members.

Spot market prices

The second half of 2021 already saw considerable price increases in the spot market, partly as the economy recovered following the Covid-19 pandemic. Prices in wholesale electricity trading once again multiplied following the invasion of Ukraine in February 2022. Although prices fell again in 2023, they were still around the level of 2021. In 2024, day-ahead prices for the baseload on the spot market fell more than 16% from the previous year. The downwards trend of 2023 thus continued, but prices were still on average over twice as high as in 2020.

The average spot market price (Phelix Day Base) was around €80/MWh in 2024. While the range of the middle 80% of all prices reduced again in 2024, there were a few very high extremes in June and in November and December. The extreme prices of over €490/MWh in June were due to a decoupling of the day-ahead auction on the EPEX Spot caused by a technical problem.[11]

[9] See LEBA Monthly Volume Reports.

[10] The EEX allows traders to register OTC trades on EEX for clearing and settlement via European Commodity Clearing (ECC).

[11] For details see the 2023/24 Market Power Report, page 51 et seq.

The peaks in November and December of over €230/MWh and €395/MWh respectively occurred during "dunkelflaute" phases with very little wind or solar power.[12]

Futures market prices

Prices for year-ahead futures developed similarly to those on the spot market, with the extremely high 2022 prices falling in 2023 but staying at a higher level than in 2021 and, especially, 2020. With a yearly average of €89/MWh for 2024, the German Power Future for delivery in 2025 was down about 35% from 2023. The average price of the Phelix Peak Year Future was around €98/MWh, corresponding to a 40% year-on-year decline.

Retail electricity markets

Contract structure of non-household customers

The contract structure for interval-metered customers in 2024 did not change appreciably from the previous year. Default supply and non-default contracts with default suppliers continue to be less important for interval-metered customers than for household customers. There were very slight rises in the number of electricity suppliers and the supplied volume in 2024.

In 2024, interval-metered customers were supplied with just under 233 TWh of electricity at 457,568 market locations, compared to about 221 TWh at 407,101 market locations in 2023. Almost all of this amount was supplied under non-default contracts. It is still unusual, but not impossible, for interval-metered customers to be supplied under default supply or fallback supply. A total of 0.5 TWh of electricity was supplied to interval-metered customers under default or fallback supply. This is about 0.2% of the total volume supplied to interval-metered customers.

Of the total volume delivered to interval-metered customers, 22% was supplied under a contract with the default supplier on non-default terms and about 78% under a contract with a legal entity other than the local default supplier. In 2023, 23% of the total volume was supplied under non-default contracts with the default supplier and 77% under contracts with other suppliers.

Contract structure and competitive situation for household customers

There was a slight increase in the number of different electricity suppliers from which household customers could choose. In 2024, household customers could choose between an average of 139 suppliers (not taking account of corporate groups) (2023: 129).

In 2024, 40% of the total volume delivered to household customers was supplied under a contract with a supplier other than the local default supplier. That means that default suppliers still provided about 60% of the total volume under default or other contracts. About 22% of the volume delivered to household customers was supplied under a default contract (2023: 25%). The proportion of customers with a default contract was

[12] See for example https://www.bundeskartellamt.de/SharedDocs/Meldung/DE/Pressemitteilungen/2024/25_11_2024_Marktmachtbericht_Stromerzeugung.html

thus slightly smaller than in 2023. About 38% of the total volume delivered to household customers was supplied under a non-default contract with the local default supplier. The strong position held by default suppliers in their service areas was therefore unchanged from the year before. The share of green electricity in the total volume of electricity supplied to household customers in Germany increased in 2024 to 60% (2023: 54%).

Supplier switches by non-household customers

The volume-based switch rate across all consumption categories above 10 MWh/year was 14.1% in 2024, compared to 13.2% the year before. The switching rate for non-household customers has been rising slowly but steadily since 2021.

One explanation for companies' greater willingness to change supplier could be the recent drops in wholesale prices for commercial and industrial customers. When prices are falling, companies can save money by switching contracts to competitors at an early stage, provided there are enough suppliers and functioning competition. The discontinution of the electricity price brake at the end of 2023 could also explain the increasing switching activity in the following year.

Supplier switches by household customers

There was a clear increase in the number of supplier switches in 2024 to about 7.1mn from 6mn in 2023 – a rise of 18% and a new all-time high. The switch rate was around 14% (2023: 12%).

One reason for the growth is that in 2023, many household customers had still been bound by comparatively expensive contracts that they had taken out during or immediately after the energy price crisis in 2022. Once these contracts had run out, many consumers took the opportunity to switch to lower-priced suppliers. The end of the electricity price brake in 2023 also made it particularly worthwhile for many households to change to a more economical tariff.

Contract switches by household customers

There were more contract switches with existing suppliers in 2024 than in the year before. A total of around 3.3mn household customers changed their energy supply contract with their existing supplier (2023: 3.0mn). The volume affected by these contract switches was 9.2 TWh (8.3% of the total consumption), higher than the figure of 7.8 TWh from 2023 (7%).

The reasons for this growth in contract switching are largely the same as for supplier switching. Customers that had to conclude new contracts in the phase of the energy price crisis when prices were highest were able to replace them with cheaper tariff options once the minimum term had been reached. Consequently, many household customers changed to more favourable contract terms while remaining with their existing supplier. The expiry of the electricity price brake in 2023 was a contributing factor here, too.

Terminations and disconnections

In 2024, suppliers (default suppliers and their competitors) terminated a total of 236,195 customer contracts because, for example, customers were late paying their bills. Overall, 91% (216,049) of these terminations were

for non-default contracts. A smaller proportion (9% or 20,146) of the terminations were for default contracts. A supplier can only terminate a default supply contract if it is not subject to a default supply obligation pursuant to section 36(1) EnWG. That is the case if it is economically unreasonable for the default supplier to continue supply.

The number of disconnections carried out by the network operators in 2024 reached 239,269, a clear increase compared to the previous year (2023: 204,441). The number of disconnection notices issued by suppliers to household customers is very much higher. The number of notices issued was approximately 4.6mn, of which about 981,000 were passed on to the network operator with a request for disconnection (2023: 3.8mn notices and 739,000 requests). The rise in disconnections from 2023 could be due to the fact that in 2023, some suppliers chose not to carry out disconnections following the energy price crisis and to avoid social hardship.

Prepay systems

Closely related to the topic of disconnections and terminations is also that of prepay systems under section 14 of the Electricity Default Supply Ordinance (StromGVV), such as cash meters and smart card readers. The default supplier is entitled to require advance payment for electricity consumption in a billing period if, based on the individual circumstances, there are grounds to assume that the customer will not meet their payment obligations or meet them in time.

According to 297 electricity suppliers, a total of 11,985 household customers on default contracts had cash or smart card meters, or comparable prepayment systems, in 2024 (2023: 12,300). In 2024, 2,113 prepay systems were newly installed and 2,104 existing ones were removed. The numbers of such systems are therefore still very low. Costs for meter operation of a cash or smart card meter, or a comparable prepayment system, averaged €35 per year and meter in 2024.

Electricity prices for industrial customers – annual consumption of 24 GWh

The price level for a typical industrial customer is a little lower than in the previous reporting period. In the example of an annual consumption of 24 GWh, the total price without VAT and possible reductions as at 1 April 2025 was 19.09 ct/kWh (down about 6%). This year's survey additionally asked about procurement costs, which make up about half of the total price (excl VAT) for a typical industrial customer. There are a range of legal options for industrial customers with consumption of 24 GWh/year to reduce their electricity costs, for example discounts on network tariffs, the concession fee or electricity tax. The price component not controlled by the supplier for an industrial customer eligible for all these reductions would be 1.16 ct/kWh instead of 7.64 ct/kWh. There are different eligibility requirements for the various possible reductions.

Electricity prices for commercial customers – annual consumption of 50 MWh

The price level for a typical commercial customer is also a little lower than in the previous reporting period. In the example of an annual consumption of 50 MWh, the total price as at 1 April 2025 was 28.75 ct/kWh (down about 6%). The procurement costs, which were additionally asked about in this year's survey, made up about 37% of the total net price.

Electricity prices for household customers

Data was collected from the suppliers operating in Germany on the prices for household customers as at 1 April 2025. There was a decrease in the average price (including VAT) to 40.05 ct/kWh (2023: 41.59 ct/kWh).[13] The electricity price is made up of a component controlled by the supplier (energy procurement, distribution and margin) and a component not controlled by the supplier (such as levies and taxes). The component not controlled by the supplier accounted for about 60% of the price as at 1 April 2025 and was larger than in the previous year (2024: 56%), while the component controlled by the supplier accounted for about 40% and was therefore smaller (2024: 44%). The average price for household customers on default contracts with an annual consumption of 2,500 kWh to 5,000 kWh fell as at 1 April 2025 to 44.93 ct/kWh (2024: 45.62 ct/kWh). The average price for customers on a non-default contract with their default supplier is 39.51 ct/kWh (2024: 41.03 ct/kWh). The price for customers on a contract with a supplier other than their local default supplier decreased by about 4% to 38.20 ct/kWh as at 1 April 2025 (2024: 39.86 ct/kWh). In 2025, prices for customers with a supplier other than their local default supplier were therefore lower than prices with the default supplier.

The data available to the Bundesnetzagentur from the monitoring survey provide a detailed picture of longer-term monthly developments in electricity prices for household customers. A distinction is made between prices for new customers and those for existing ones. A modelled electricity price is calculated using a model that takes into account current wholesale prices, surcharges, taxes, network tariffs, levies, and distribution costs and margin.

In 2025, the average modelled electricity price for new customers is 36.9 ct/kWh. It is therefore slightly higher than the previous year (2024: 35.1 ct/kWh) but still well below the 2022 level of 54.5 ct/kWh and the 2023 level of 41.4 ct/kWh. The current price is about the same as the average from 2021. The average modelled electricity price for dynamic tariffs in 2025 is 36.3 ct/kWh, slightly below the average price level for fixed-price contracts for new customers. The modelled electricity price for each month is published on the SMARD transparency platform under “Energy data compact – Retail”.

Green electricity

Developments in the supply of green electricity to household customers are very positive, with clear rises in both the volume supplied and the number of customers receiving green electricity.

The proportion of the household customer volume made up by green electricity rose from 54% in 2023 to 60% in 2024. At the same time, the number of household customers also rose: in 2023, 58% of customers were supplied with green electricity. By 2025 it was 67%.

This trend shows that more and more customers are deliberately deciding to buy sustainable electricity. This may be due to the attractive prices for green electricity tariffs. The average price for green electricity as at 1 April 2025 is 39.32 ct/kWh. Green electricity tariffs are thus cheaper than contracts from the default supplier, whether default or other contracts, although they are still slightly more expensive than the most economical

[13] This average across all contract categories weights the prices of the individual contract types for an annual consumption of 2,500 kWh to 5,000 kWh by the volume delivered by the electricity supplier.

conventional tariffs from other competing suppliers. Overall, there is a clear trend towards green electricity in the household customer market, not just because of environmental concerns but also due to its competitive prices.

Surcharges

In 2024, the network operators passed on about €4.72bn in surcharges to the network users. This total comprises the offshore network surcharge (€2.15bn), the section 19 StromNEV surcharge (€1.67bn) and the KWKG surcharge (€0.90bn).

The EEG surcharge was reduced to 0 ct/kWh with effect from 1 July 2022 to reduce the burden on electricity customers. Since 2023, financial assistance for the expansion of renewable energy has been part of the federal budget.

The interruptible loads surcharge was levied for the last time for 2022 because the relevant ordinance is no longer in force.

Electricity price brake – supervision by the Bundesnetzagentur and the Bundeskartellamt

The Electricity Price Brake Act (StromPBG) served to implement provisions of European law. The aim of the StromPBG was to lessen the burden on electricity customers. The relief was to be financed mainly through a levy on the surplus revenue earned by operators of electricity generating plants who had benefited from the increase in electricity prices on the wholesale markets. The price brake applied from 1 March 2023 until 31 December 2023, with back payments for January and February 2023 being made in March 2023. The Bundesnetzagentur is responsible for ensuring that the levy on surplus revenue is paid correctly and for overseeing the overall system of incoming and outgoing payments under the StromPBG.

The levy on surplus revenue earned by operators of electricity generating plants is one way of refinancing the relief payments. These plant operators were required to submit a self-assessment with details of the surplus revenue they had earned in two accounting periods and to pay the levy on the surplus revenue to the operators to whose networks their plants were connected. The first accounting period was from December 2022 to March 2023 and the second from April to June 2023, after which the scheme for the levy on surplus revenue under the StromPBG ended.

The network operators received a total sum of about €777mn in levy payments in the first accounting period and about €3mn in the second period. This means that according to current information a sum of around €780mn was received from surplus revenue in accordance with the StromPBG and used to relieve the burden on final customers. This sum does not include payments from plant operators involved in ongoing court proceedings.

The Bundesnetzagentur checks the plant operators' self-assessments and payments in order to determine the exact amount payable. It also takes action as provided for by the StromPBG against plant operators who have not submitted a self-assessment or complete self-assessment, or who have not or not correctly paid the levy on surplus revenue, in order to set the amount to be paid. The Bundesnetzagentur is still conducting

proceedings in about 90 cases in which plant operators had neither submitted a self-assessment nor made payments. About 100 proceedings are being conducted against plant operators who have not fulfilled their payment obligation. Further proceedings are ongoing involving plant operators who had not submitted a self-assessment or made payments correctly in accordance with the requirements of the StromPBG. As a result, the total sum of levy payments is not yet final and will change depending on ongoing and forthcoming proceedings.

By contrast, the Bundeskartellamt's task of the special control of abusive practices under the StromPBG and the Brake on Gas and Heat Prices (EWPBG) covers the market for the supply of electricity, gas and heat to final customers, which is downstream from the generation market. The Bundeskartellamt checks the electricity, gas and heat supply companies' pricing to see whether the companies have abused the regulations for relief payments.

The statutory regulations set a maximum price payable by consumers up to the end of 2023 within a fixed volume quota. This reference price varied depending on the type of energy and the customer group. Suppliers were able to have the difference between the statutory reference price and the price agreed between the supplier and the customer reimbursed by the state.
The price brake legislation prohibited energy suppliers from abusing the regulations designed to reduce the burden on consumers through their pricing. In particular, suppliers applying for reimbursement payments were prohibited from increasing their unit prices without proper reasons, which could arise from market-based prices and costs or price and cost components not controlled by the supplier in terms of regulation.

In the event that a company is found to have abused the regulations, the Bundeskartellamt can, for example, impose a fine or order that the company pay back the reimbursement.
The Bundeskartellamt has initiated 20 investigations in the electricity sector accounting for around €1.6bn of the reimbursements, which is about 13% of the total reimbursed by the state to electricity suppliers. It is only possible for the Bundeskartellamt to make a final assessment of whether abusive behaviour has taken place on the basis of the consumption finally billed to customers or the audited company data used in the final statements on reimbursement amounts submitted to the competent authorities. At the time of this publication, just over two thirds of the investigations initiated in the electricity sector had been concluded without the Bundeskartellamt issuing a repayment or other order. They were closed because, for example, the companies had reduced their reimbursement claims in the final statements to the competent authorities or no abusive revenue-cost ratio within the meaning of the legal regulations was found. About a third of the proceedings are still pending.

Consumer advice and protection
The energy consumer advice service is the national point of contact for consumers who want information on their rights in the energy sector, applicable legal regulations or dispute resolution options. In the first half of 2025, the Bundesnetzagentur received a total of 28,225 telephone, email, online, letter and fax queries and

complaints (compared to 31,894 in the same period in 2024). Just over half of the queries and complaints were made by telephone. More than 80% of written submissions were on electricity-related topics. The proportion dealing with gas issues was 10%, a 10% drop on 2023, while 4% were about both sectors. In both sectors, the majority of enquiries were about contractual issues concerning energy supply and billing. There was an increase in interest about switching energy suppliers and in questions about disconnecting from gas, installing heat pumps and the possibility of using solar PV installations and wallbox chargers. People also bring up metering and network connection topics in this context.

Up-to-date consumer information and further information on the topics mentioned here are available online at www.bnetza.de/verbraucherservice-energie (in German)

Heating electricity

Contract structure and supplier switching

Heating electricity means the electricity consumed by night storage heaters and by electric heat pumps. The consumption of electricity supplied for heating was again lower than in the previous year. Possible reasons include customers personally cutting back on the amount of electricity they use and customers replacing their old heating systems with modern heat pumps or other types of heating. According to the volumes reported by about 924 suppliers of heating electricity (2023: 874 suppliers), about 11 TWh of heating electricity was supplied to customers at nearly 2.10mn market locations. This corresponds to an average supply of just under 5,643 kWh per market location. This compares to the previous year's figures of just under 5,884 kWh per market location and a total volume of 12.1 TWh supplied to 2.07mn market locations.

The volume supplied for night storage heating systems amounted to just under 6.8 TWh at 1.13mn market locations. This compares to a volume for heat pumps of just over 4.3 TWh at about 0.83mn market locations. Night storage heating continues to account for the largest share of consumption, with about 57.7% of volume and 61.2% of market locations. The share of heat pumps compared to night storage heating has steadily increased over the years. The total number of market locations supplied for heat pumps increased year-on-year by about 7%, while the proportion of night storage heating systems fell by about 7%. This is also reflected in the shares in the total market locations supplied for heating electricity. Heat pumps made up 42.3% of market locations in 2024, up from 35.8% in 2023.

The share of heating electricity supplied in 2024 by a supplier other than the local default supplier was lower than the year before. In 2024, 33.5% of the total volume of heating electricity supplied was accounted for by suppliers other than the default supplier (2023: 38%). By contrast, there was a slight increase in the percentage of heating electricity market locations not served by the default supplier from 34.7% to 35.8%.

The supplier switching rate in the electric heating segment based on the number of market locations was much higher than in the previous year. In 2024, supplier switches involved 328,746 heating electricity market locations with a total heating electricity volume of about 2,015 GWh. The switch rate in terms of volume

is 19%, compared to just 9.3% in 2023. The end to the electricity price brake, the government measure to relieve the pressure on consumers in 2023, could be one reason for the change. Switching was largely subdued while the brake was in application as there was a uniform price cap of 40 ct/kWh.

Price level
According to the data provided by suppliers, the volume-weighted gross total price (inc VAT) as at 1 April 2025 for night storage heating was 28.47 ct/kWh. The corresponding price for heat pumps was 31.70 ct/kWh and for heat pumps with a separate meter it was 27.44 ct/kWh. If metering is separate, there is no requirement to pay the KWK surcharge or the offshore network surcharge, provided the electricity is supplied via its own meter point, pursuant to section 22 of the Energy Financing Act (EnFG). Partly for this reason, the overall price is lower. The part of the electricity price that is controlled by the supplier, which comprises procurement costs, distribution costs and the supplier's margin, is 14.75 ct/kWh for night storage heaters, 15.12 ct/kWh for heat pumps and 15.55 ct/kWh for heat pumps with separate metering. The controllable part is about 52% of the total price for night storage heaters, about 48% for heat pumps and about 57% for heat pumps with separate metering. The rest is made up of taxes, surcharges and concession fees.
The size of the controllable part is largely determined by the development of procurement costs.

Electricity metering

The undertakings reported a total of almost 54mn electricity meter locations in 2024. The German state of North Rhine-Westphalia has the highest number of meter locations, with more than 11mn.
A total of about 7.4mn final customers are affected by the mandatory installation of smart metering systems within the meaning of section 29 in conjunction with sections 31 and 32 of the Metering Act (MsbG). The majority of these are final customers with an annual electricity consumption of between 6,000 kWh and 10,000 kWh at nearly 1.85mn meter locations. There are also nearly 1.4mn meter locations for consumer devices covered by section 14a EnWG. A total of about 644,000 mandatory smart metering systems across all final customer categories were installed, up by over 224,000 on the year before. In addition, about 290,000 optional smart metering systems were installed for customers with a consumption of less than 6,000 kWh. As in previous years, there was also an increase in the installation of mandatory modern metering equipment.

In 2024, there was again a clear trend away from electromechanical meters in the SLP customer category, which includes all household customers. The number of electromechanical meters has dropped sharply overall, while the number of modern metering devices has risen by about 3.7mn. There was a large increase in the number of modern metering devices as defined in section 2 para 15 MsbG that are not connected to a communications network. Modern metering equipment is now in use at a total of about 25mn meter locations. Total investment in and expenditure on metering increased in 2024 by about €122mn to some €969mn, about €81mn below the forecast. This year's forecast of almost €1.28bn is higher than the figure forecast in previous years. The total investment volume of some €969mn in 2024 includes about €607mn for smart metering systems and modern metering equipment, up by approximately €129mn on the year before. The forecast for 2025 indicates another clear increase to about €920mn.

Gas

Gas network overview

In 2024, approximately 175.5 TWh of gas was delivered to final customers from the network of the transmission system operators (TSOs). The quantity taken off from the network of the distribution system operators (DSOs) in 2024 was 668.5 TWh. The total offtake was 844 TWh (2023: 811.5 TWh), about 4% more than in the previous year. Large consumers with at least 10 GWh of annual consumption and gas-fired power stations drove the growth. The quantity of gas supplied to household customers as defined in section 3 para 22 of the Energy Industry Act (EnWG) fell by 2% to 229.7 TWh (2023: 234.5 TWh). Gas supplies to gas-fired power stations with a nominal capacity of at least 10 MW recorded a clear increase of 16% to 96.9 TWh (2023: 82.1 TWh).

The total amount of gas available in the German network was about 947.3 TWh in 2024. Of this, 40.9 TWh (4.3% of the total) came from domestic sources, while 865.1 TWh was imported. In 2024, the annual storage balance – the difference between the gas that entered and exited storage in a year – was 30.6 TWh. The storage balance was positive, which means that overall, more gas was withdrawn from storage than was injected into it, for the first time since 2021. Moreover, 10.9 TWh of biogas was fed into the German natural gas system in 2024. Just over 89 TWh of the gas available was exported to Germany's neighbours, a 52% decline on the year before (2023: 187 TWh).

Some major consumers (industrial customers and gas-fired power stations) procure their gas themselves from the wholesale market without going through suppliers. These final customers then approach the network operator as shippers (paying the transport tariffs themselves). In 2024, the quantity of gas procured in this way on the transmission systems amounted to 72.1 TWh (2023: 62.3 TWh), equivalent to about 41% of the total quantity of gas delivered by TSOs. As regards gas distribution systems, the amount of gas procured without a conventional supplier contract amounted to 41.7 TWh (2023: 36.6 TWh), corresponding to a share of 6% of the DSOs' total gas supplies.

Market concentration

The competitive situation on the gas wholesale market did not change significantly from the previous year. The market concentration of underground gas storage facilities and on the individual German gas retail markets only changed minimally as well. The shares of the four largest companies in gas sales to standard load profile (SLP) customers decreased slightly, whereas the shares in sales to interval-metered customers rose slightly. The concentration of the four largest suppliers on the market in the supply of SLP and interval-metered customers varies slightly but in a range that still does not indicate market dominance.

The gas sold by the suppliers in Germany saw an increase of about 8% to 740 TWh in 2024, having declined around 10% the year before.[14]

Gas wholesale market

In the gas wholesale sector, a quantitative analysis is made of the relative importance of the wholesale companies without making a conclusive market delimitation. This sector is still highly concentrated.

Underground gas storage facilities

The share of companies in the total working gas volume in the underground natural gas storage facilities, and thus their access to storage capacity, is another important indicator of concentration on the gas markets. The underground storage facilities connected to the German gas network and relevant to the depiction of concentration had a maximum usable volume of working gas of about 290 TWh on 31 December 2024. This figure follows on from the stable storage volume of recent years. The aggregate working gas volume of the three companies with the largest storage capacities (CR3) was also largely unchanged from last year at about 210 TWh on 31 December 2024, which again corresponds to a share of 73%. The level of concentration remains high because two of the largest storage facility operators are still owned by the Federal Republic of Germany, although it is set out in law that the stake in Uniper will return to private ownership by the end of 2028.

Gas retail markets

During the 2024 reporting year, suppliers sold a total of 319 TWh of gas to SLP customers and 420 TWh to interval-metered customers.[15] Total sales thus rose again in 2024 by about 8%, having fallen by approximately 10% year-on-year in 2023. Sales to interval-metered customers grew more strongly than those to SLP customers.

The reasons for this development are higher sales to industrial consumers, more electricity generated in gas power plants and possibly cost savings by customers switching to interval metered contracts. Of the total sales to SLP customers in 2024, about 277 TWh or 87% was under non-default contracts, around the same as the year before, while a somewhat reduced proportion of about 13% (42 TWh) was under default contracts.[16] The cumulative sales of the four largest companies to SLP customers amounted to 72 TWh, corresponding to a concentration ratio (CR4) of about 23%. The cumulative sales of the four largest companies to interval-metered customers totalled about 130 TWh, a concentration ratio of 31%. The CR4 shares were up about three percentage points on the interval-metered market and about two percentage points on the SLP market. These two aggregated market shares remain well below the statutory thresholds for presuming market dominance.[17]

---

[14] The difference between the figure of 740 TWh given here and the figure of 844 TWh from THE given above is explained by consumers procuring their own gas, as discussed in the introductory section, and inaccuracies in suppliers' reporting.

[15] "Sales" here and in the whole section on gas retail markets refers to the amount delivered by suppliers to their customers in units of energy.

[16] The percentage of interval-metered customers on default contracts is negligible and is therefore not taken into account.

[17] Pursuant to section 18(6) of the Competition Act (GWB), a body of undertakings is presumed to be dominant if it consists of five or fewer undertakings reaching a combined market share of two thirds.

Market area conversion

Over the next few years, gas supplies in north-western Germany will continue to be converted from L-gas to H-gas. The new natural gas supply structure will affect more than four million household, commercial and industrial customers with an estimated 4.9mn appliances burning gaseous fuels. All of these appliances must gradually be converted from L-gas to H-gas. In 2024, 805 interval-metered customers were successfully converted (2023: 1,508). Approximately 4,000 interval-metered customers still have to be converted in the period from 2025 to 2029. Additionally, 429,377 SLP customers were successfully converted (2023: 463,470). Approximately 1.7mn SLP customers still have to be converted from 2025 to 2029. Overall, the market area conversion is on schedule and making good progress. More information on it may be found in section III.B.3.

Gas imports and exports

Gas imports

The assessment of imports and exports is based on the physical gas flows that enter and exit Germany at cross-border interconnection points, as reported daily by the TSOs to the Bundesnetzagentur. The total volume of natural gas imported into Germany in 2024 was 865 TWh. Imports to Germany were thus down by 103 TWh from the previous year's figure of 968 TWh. The most important sources of imported gas in Germany in 2024 were Norway, the Netherlands and Belgium, with a total volume of 786 TWh or about 91% of all imports to the country. No Russian pipeline gas was supplied again in 2024. The Netherlands, as an established and liquid European trading hub and point of arrival for liquefied natural gas (LNG) shipments and a country with connections to natural gas fields in Norway and the United Kingdom, is an especially significant source of imports for Germany. LNG imports accounted for 70 TWh.

Gas exports

In 2024, the total volume of natural gas exported by Germany was 89 TWh. Following on from the previous year's figure of 187 TWh, exports from Germany fell by 98 TWh. Natural gas was mainly exported to Czechia, the Netherlands and Austria.

Biogas

A total of 267 plants injected biogas into the network in 2024 (2023: 242). The total contractually agreed input capacity in 2024 was 3.421mn kWh/h (2023: 2.722mn kWh/h). The injection of biogas in 2024 was 10.9 TWh (2023: 10.2 TWh).

Underground gas storage facilities

Germany's gas storage facilities are key to the supply of gas, especially in the winter months. The total maximum usable volume of working gas in underground storage facilities as at 31 December 2024 was stable from the previous year at 289 TWh.[18] Of this, 137 TWh was accounted for by cavern storage, 129 TWh by pore storage and 23 TWh by other storage facilities.
From autumn 2025, cavern storage facilities in Germany will have to be 80% full by 1 November and most pore storage facilities 45% full, resulting in an average storage level target of about 70%. Storage levels were 75% by the editorial deadline for the monitoring report. More information on gas storage facilities may be found in section III.B.5.

Network structure data

As at 31 December 2024, the total length of the notified gas transmission system was around 43,500 km (2023: 45,800 km).[19] The gas transmission system included 3,500 exit points for delivery to final customers, redistributors or downstream networks, including the points at which gas can be taken off for delivery to storage facilities, hubs and conditioning or conversion plants. The number of registered final customer market locations in the transmission system was 527.

As at 31 December 2024, the total length reported in the monitoring of pipelines in the gas distribution system including house connections was just over 561,000 km and included around 11mn exit points for delivery to final customers, redistributors or downstream networks, including the points at which gas can be taken off for delivery to storage facilities, hubs and conditioning or conversion plants. There were 14.4mn registered final customer market locations in the gas distribution network, including around 12.8mn market locations of household customers as defined by section 3 para 22 EnWG. The majority of gas DSOs have short to medium length systems of up to 1,000 km, and 93 DSOs have gas systems with a total length of more than 1,000 km.

There are a total of around 6,800 entry points to the gas distribution networks, of which 223 are for emergency entry only. A look at the number of market locations served by the DSOs shows that only 29 DSOs supply more than 100,000 each. The majority of DSOs active in Germany supply between 1,000 and 10,000 gas customers.

---

[18] Including the total storage capacity of the two facilities located in Austria, Haidach (SEFE) and 7Fields (Uniper), with about 37 TWh of working gas volume. 7Fields is connected only to the German market area, while Haidach is connected to both the German and the Austrian market areas (transmission level) but has no country-specific volume division of storage capacity.

[19] The reduction in the length of the gas network is because the network of Nord Stream AG is not counted.

Gas network expansion

Germany is aiming to become climate neutral by 2045. To achieve this target, the transition from natural gas to green and climate neutral gases, such as green hydrogen and biomethane, must be sped up considerably. It is therefore necessary to roll out and adapt a flexible gas infrastructure that can integrate different types of gas. Major network adaptations are also required to accommodate the increasing use of LNG as an important complement to security of supply.

The current Gas Network Development Plan (NDP) 2022-2032 reflects these developments. Once the TSOs had presented their draft, the Bundesnetzagentur conducted a written consultation with potential and actual network users from 16 May to 13 June 2023. Based on the consultation, it issued a request for amendment on 21 December 2023, which the TSOs implemented in the final NDP by 20 March 2024. In the request for amendment, the Bundesnetzagentur confirmed 133 of the measures submitted by the network operators with an investment volume of around €4.1bn. These measures include the construction of 925 km of new pipelines as well as 149 MW of new compressor capacity in the German transmission system. The NDP is a dynamic planning tool that is regularly adjusted to new demands. The amendment of the EnWG in 2024 expanded the remit of the Gas NDP to include hydrogen. It was also aligned to the network development planning process for electricity, so that developments across systems can be taken into account. The scenario framework for the Gas and Hydrogen NDP 2025-2037/2045 was assessed by the Bundesnetzagentur and approved, with changes, on 30 April 2025. The gas TSOs and regulated hydrogen transmission network operators can now develop the first draft of the Gas and Hydrogen NDP 2025-2037/2045 on this basis.

Investments by gas network operators

TSOs

In 2024, investments in network infrastructure by the 15 German TSOs amounted to €1,518mn (2023: €1,651mn). Of this, €1,165mn (2023: €1,413mn) was accounted for by investments in new builds, upgrades and expansion projects and €353mn (2023: €238mn) by investments in network infrastructure maintenance and renewal. The projected total investment for 2025 is €2,092mn.
Expenditure on network infrastructure service and maintenance amounted to €453mn in 2024 for all TSOs (2023: €425mn). The TSOs' planned expenditure for 2025 is €525mn.

DSOs

Over 600 gas DSOs reported a combined investment volume of €1,186mn in network infrastructure for 2024 (2023: €1,170mn). Investments in new builds, upgrades and expansion accounted for €507mn of the total (2023: €530mn), while €679mn went into maintenance and renewal (2023: €640mn). The projected total investment for 2025 is €1,372mn.

Service and maintenance expenses, based on the data provided by the DSOs, totalled €1,340mn in 2024 (2023: €1,216mn). The projected investment in servicing and maintenance for 2025 is €1,506mn.

The level of DSO investment depends on the length of their gas pipeline network and the number of market locations served as well as other individual structure parameters, including, in particular, geographical conditions. While 96 of the surveyed DSOs reported investments of between €1mn and €5mn, 51 DSOs made investments totalling more than €5mn.

Of the surveyed DSOs, 226 reported total expenditures in the bracket between €100,001 and €500,000, while 58 DSOs reported expenditure totalling more than €5mn.

Capacity offer and marketing

In the 2023/2024 gas year, the total firm entry capacity offered across the Germany-wide market area Trading Hub Europe (THE) was 415.9 GWh/h (2022/2023: 549.2 GWh/h). About 43%, or 180.2 GWh/h, of the total entry capacity was firm, freely allocable capacity (FZK) compared to 203.4 GWh/h in 2022/2023. In the 2023/2024 gas year, the total firm exit capacity offered across the THE market area was 355.1 GWh/h (2022/2023: 352.9 GWh/h). It should be noted that not every TSO offers all capacity products. The aggregated values therefore cannot be projected onto each individual TSO.

Across Germany, the TSOs reported a nominated quantity of 1,011 TWh in 2024 at all entry points where there is a nomination obligation (2023: 1,285 TWh). In contrast, nominated quantities at exit points were considerably lower, totalling 238 TWh (2023: 367 TWh). The reason for the significantly lower figure on the exit side is that gas for domestic use in particular is withdrawn from the transmission network at exit points where there is no nomination obligation. The exit points where there is a nomination obligation are cross-border and market area interconnection points and connection points to storage facilities and domestic production. Network connection points to final customers, on the other hand, are not subject to a nomination obligation. More information on available capacity may be found in section III.C.4.

Gas supply disruptions

In 2024, the average interruption in supply per connected final customer was 1.55 minutes (2023: 1.26 minutes), which is slightly higher than the long-term average of 1.52 minutes a year. This figure shows that the German gas network continues to have a high quality of supply. There was a large variation in the interruption times among the federal states, ranging from 0.10 minutes in Hamburg to 6.84 minutes in Thuringia. More information on gas supply disruptions may be found in section III.C.5.

Gas network tariffs

The average volume-weighted network tariff for household customers was 2.16 ct/kWh as at 1 April 2025 (2024: 1.82 ct/kWh). Network tariffs for household customers were up just over 19% from the previous year. The network tariff for commercial customers was 1.85 ct/kWh on 1 April 2025 (2024: 1.54 ct/kWh), around 20% higher than the previous year. The network tariffs for industrial customers increased by just over 21% to 0.51 ct/kWh in 2025 (2024: 0.42 ct/kWh). The large increase in gas network tariffs for all groups of customers in 2025 is mainly due to newly introduced depreciation rules, lower gas consumption and higher costs for maintaining and operating infrastructure. A new regulation (KANU 2.0) allows network operators to pre-empt the costs of dismantling the network, while the energy transition is leading to declining gas consumption and fixed costs are spread across fewer and fewer final customers. Regional differences and rising investment costs strengthen this effect. A further increase in network tariffs is expected for 2026.

Wholesale gas markets

Wholesale trading volume

Following the effects of the Russian invasion of Ukraine in 2022, 2024 saw another decline in trading volumes, albeit a smaller one than in 2023. Behaviour on the futures markets was fundamentally altered. While the total exchange-traded volume (including cleared volumes)[20] on the German THE market area was down about 20% to around 1,368 TWh in 2024 from 1,703 TWh in 2023, the proportion of futures remained at a relatively high level. By comparison, futures made up about half of the EEX trading volume in 2024, having only been around 12% in 2021, before Russia started the war on Ukraine. The on-exchange trading volume on the spot market dropped another 19% to about 688 TWh in 2024 after a 23.5% decrease in 2023. The focus of spot trading in 2024, as in the previous years, was on day-ahead contracts. The futures trading volume fell from 856 TWh in 2023 to about 680 TWh in 2024, down 21%, although this was, as stated above, still comparatively high.

Wholesale prices

The (unweighted) annual average for THE in the European Gas Spot Index (EGSI) published by EEX was €34.64/MWh in 2024, down around 15%. The downwards trend in prices continued from the drop of about 67% the previous year, although it did not quite reach the level from early 2021 and prices started to rise continually again in the course of 2024. The EGSI monthly average was €30.51/MWh in January 2024 and €45.74/MWh in December.

The European Gas Index Deutschland (EGIX) is based on exchange transactions concluded in the relevant front-month contracts for the German market area. The EGIX fell again by nearly 30% to an (unweighted) average of €34.22/MWh in 2024, having fallen 64% the year before. The values were at their lowest in March (€23.20/MWh) and their highest in December (€49.08/MWh).

[20] The EEX trade registration function allows traders to register over-the-counter trades on EEX for clearing and settlement via European Commodity Clearing (ECC).

Over-the-counter wholesale trade

The eight broker platforms participating in this year's data monitoring reported having brokered natural gas transactions for delivery to Germany for a total of 2,426 TWh (2023: 2,157 TWh), of which 762 TWh was for contracts with delivery in 2024 and a delivery time of at least one week. That means that the total brokered volume recorded another rise, this time of just over 12% after around 7% the previous year. The brokers' trading volume had fallen considerably after the Russian invasion, with trading presumably shifting to the exchanges, but in recent years they have seen a recovery. Short-term transactions on the spot market with a delivery period of less than a week fell from about 10% to 6% in 2024. Futures for the current and the next year, on the other hand, were the clear focus of the brokers in natural gas trading.

Nominations at the virtual trading point

The gas volumes nominated at the THE virtual trading point amounted to 2,886 TWh in 2024. Although this continued the decline of the two previous years, the drop was much less at 5% from 15% in 2023.[21] About 94% of the nomination volume was taken up by H-gas and the remaining 6% by L-gas. The reduction of the volume of L-gas caused by the market area conversion, which had been noticeable in previous years, thus continued.

As in the years before, the monthly nomination volumes display seasonal variations. The average trading volume from May to September 2024 was 197 TWh, while from October to April it was 302 TWh. The lowest nomination volume was again in September with 195 TWh and the annual peak was 324 TWh in January. The number of active trading participants in the single German market area was an average of 469 a month for H-gas in 2024 (2023: 439) and 189 for L-gas (2023: 187).[22]

Gas retail trade

Number of suppliers

The percentage of gas distribution systems in which more than 100 gas suppliers were active remained unchanged in 2024 at around 63%. The national average of gas suppliers from which customers in Germany were able to choose was 108 (2023: 109 gas suppliers). There were 139 gas suppliers operating nationwide throughout Germany[23] in 2024 (2023: 140).

A total of seven electricity and gas suppliers told the Bundesnetzagentur during 2024 that they would stop supplying household customers. By the editorial deadline of this report, six electricity and gas suppliers had ended their activities in 2025. Another 11 had informed the Bundesnetzagentur that they would stop supplying household customers by 31 December 2025.

Contract structure of non-household customers

[21] The nomination volume before Russia's attack on Ukraine was somewhat lower at 2,464 TWh, however.

[22] An active participant in the virtual trading point is one who has made at least one nomination in the relevant month.

[23] The activity is considered nationwide if the gas supplier delivers gas to consumers in all 16 German federal states.

The contract structure of interval-metered customers was almost unchanged in 2024. Interval-metered customers were supplied with 420 TWh of gas at 47,298 market locations.[24] These are all non-household customers (industrial and commercial customers, gas-fired power plants). Over 99% of this amount was supplied under non-default contracts.[25] About a quarter of interval-metered customers were supplied under a contract with the default supplier on non-default terms. The largest proportion (75%) of contracts were with suppliers that were not the local default supplier. It is unusual, but not completely unheard of, for interval-metered customers to be supplied under default/fallback supply (less than 0.1% of total sales to interval-metered customers).

Contract structure of household customers

In 2024, the gas consumption of household customers was 229.7 TWh, about 2% lower than the figure in 2023 of 234.5 TWh. The proportion of default contracts declined to 15.9% in 2024. The proportion by volume of non-default contracts with the default supplier rose to 51.7%. The proportion of contracts with a supplier other than the local default supplier fell to 32.4%. Of the 229.7 TWh of gas consumed by private households, 36.5 TWh was under default contracts, 118.8 TWh under non-default contracts with the default supplier and 74.4 TWh under contracts with a supplier other than the local default supplier.

Supplier switches by non-household customers

The total number of market locations with a supplier switch rose year-on-year about 18% from approximately 16,900 to 19,900. At the same time, the offtake volume of gas affected by a supplier switch rose about 24% from about 41 TWh to 51 TWh. The group of customers with <10 GWh/year, which mostly comprises small businesses like independent professions or service providers, recorded the strongest rise.

Supplier switches by household customers

The number of supplier switches by household customers rose in 2024 to a new high of 2.3mn from the previous year's figure of 1.8mn switches. The switch rate was 17.7% (2023: 14.2%). The volume of gas affected by supplier switching was 44.3 TWh (2023: 36.1 TWh).

Contract switches by household customers

In 2024, 1.15mn gas customers chose to change contracts with their existing gas supplier (2023: 1.04mn).[26] The volume-based contract switching rate was around 9%. The volume of gas affected by contract switching was 18.9 TWh (2023: 16.8 TWh).

[24] In the 2024 reporting year, 991 gas suppliers (individual legal entities) provided data on the market locations served and volume consumed by interval-metered customers in Germany (2023: 971). These gas suppliers include affiliated companies, hence the number of suppliers is not equal to the actual number of independent competitors.

[25] In accordance with section 36 EnWG, default supply only relates to household customers. Where "default supply" is used in the section below for non-household customers, it refers to "fallback supply".

[26] A customer's change to a new gas tariff with the same gas supplier at their own request.

Gas disconnections

The number of disconnections carried out by the network operators in 2024 was 34,393, representing an increase of about 23% compared to the previous year (2023: 28,059). Fixed time periods prescribed by law must be observed between the first non-payment of bills, a notice of disconnection and the actual disconnection. Only after these periods have expired may the disconnection take place. The possibility of objections, agreements on payment or out-of-court settlements may delay the time when the disconnection is finally carried out. Moreover, in the face of the – sometimes drastic – gas price rises of recent years, many gas suppliers have at times voluntarily chosen not to carry out disconnections for a certain period of time. It may therefore be that the higher number of disconnections in 2024 is a delayed effect. The overwhelming majority of disconnections occurred when customers were late paying their bills. Nearly half of the gas suppliers surveyed said they had voluntarily decided not to disconnect their customers. Suppliers often accommodated customers by offering them individual payment arrangements. The number of household customers who had difficulty in meeting payments and took up the option of making repayments in instalments was up 26%. About 81,000 household customers made use of the instalment option (2023: 65,000).

There was an increase of 22% in disconnection requests from gas suppliers to network operators in 2024 to 218,000 from 178,000 in 2023. The number of disconnection notices issued by gas suppliers was about 8% higher. The absolute number of disconnection notices was 999,000 in 2024 (2023: 927,000). As there is sometimes a gap between the issuing of a disconnection notice and the actual disconnection, it may be assumed that some of the disconnections notified in 2024 only took place the following year.

Terminations

Despite issuing disconnection notices and orders, only a small number of gas suppliers actually terminate supply contracts with their customers. Moreover, the termination of a default supply contract is only permitted under stringent conditions. There must be no obligation to provide default supply or the requirements to disconnect gas supply must have been met repeatedly and the customer must have been warned of contract termination because of late payment. In 2024, gas suppliers (default suppliers and their competitors) terminated their contractual relationship with a total of 67,533 gas customers (2023: 59,948) due to the customers' failure to fulfil a payment obligation. About 93% of these terminations related to contractual relationships outside the default supply. Reasons frequently cited for terminating contracts included reaching the final dunning level and missing two or three partial payments without any prospect of fulfilling the claims.

Prepay systems

Closely related to the topic of disconnections and terminations is also that of prepay systems under section 14 of the Gas Default Supply Ordinance (GasGVV), such as cash meters and smart card readers. The default supplier is entitled to require advance payment for gas consumption in a billing period if, based on the individual circumstances, there are grounds to assume that the customer will not meet their payment obligations or not meet them in time. According to 34 suppliers, a total of 754 household customers had cash or smart card meters, or comparable prepayment systems, in 2024 compared to 850 in 2023.

In 2024, 92 prepay systems were newly installed and 210 existing ones were removed. Costs for meter operation and metering averaged €15.50 and €3.80, respectively, per year and meter. The yearly standing charge for gas customers was €140 on average, while the average unit price for gas customers paying in advance was 13.5 ct/kWh.

Gas prices for industrial customers for annual consumption of 116 GWh

The average total price (excluding VAT) for customers with an annual consumption of 116 GWh ("industrial customer") on the reporting date of 1 April 2025 was 6.75 ct/kWh, a slight rise year-on-year (1 April 2024: 6.22 ct/kWh).[27] The total price (excl VAT) is made up of an average of nearly 57% energy procurement costs. Components not controlled by the suppliers, such as net network tariffs, metering and meter operation, and concession fees, contribute nearly 9%. The gas tax and carbon levy together only changed minimally compared to the year before and made up about 23%. The proportion of all non-controllable price components remained at the level of around 32% from the previous year. THE's current gas balancing neutrality charge for interval-metered customers was set at €0/MWh on 1 October 2023 and has remained unchanged since then. The gas storage neutrality charge increased from 0.145 ct/kWh to 0.186 ct/kWh on 1 January 2024. It rose again in the course of the year to €2.50/MWh on 1 July.

Gas prices for commercial customers for annual consumption of 116 MWh

The average total price (excl VAT) for customers with an annual consumption of 116 MWh ("commercial customer") was 9.48 ct/kWh, the same as the previous year.[28] The total price (excl VAT) is made up of an average of 47% energy procurement costs. Components not controlled by the suppliers, such as net network tariffs, metering and meter operation, and concession fees, contribute about 20%. The gas tax and carbon levy together rose from a share of about 3% last year to 16.3%. The increase for this customer group was due solely to the higher carbon levy. The proportion of all non-controllable price components was just over 36% (2023: approx 30%); on average, these components accounted for 3.45 ct/kWh, up from 3.00 ct/kWh in 2023. Like the interval metering balancing neutrality charge, the SLP balancing neutrality charge was set by THE at €0/MWh on 1 October 2023 and left at that level. The gas storage neutrality charge increased from 0.186 ct/kWh to 0.25 ct/kWh on 1 January 2024.

Gas prices for household customers

The volume-weighted, average gas price for household customers across all contract categories was 12.13 ct/kWh as at 1 April 2025, a drop of just over 3% year-on-year (2024: 12.49 ct/kWh). In the average price across all contract categories, the largest price component "energy procurement", which makes up around 39%, fell from 5.83 ct/kWh to 4.75 ct/kWh. The share of the state-controlled price components such as value-added tax, natural gas tax, the carbon levy and concession fees is 29.3% (2024: 27.6%). The proportion of network tariffs is 19.4% in 2025 (2024: 12.8%).[29] The average network tariffs thus rose about 22% from 1.93 ct/kWh to 2.35 ct/kWh.

[27] The price questions were answered by 61 suppliers (2023: 66).

[28] The price questions were answered by 581 suppliers (2023: 685).

[29] Including upstream network costs and charges for metering and meter operations.

The volume-weighted average gas price for customers on a default contract as at 1 April 2025 was 13.57 ct/kWh, corresponding to a decrease of around 3% compared to the previous year (2024: 14.01 ct/kWh). On the same day, the volume-weighted price for customers under a non-default contract with the default supplier was 12.07 ct/kWh, just over 5% less than the level of the previous year (2024: 12.73 ct/kWh). The volume-weighted price for a contract with a supplier other than the local default supplier as at 1 April 2025 was 11.56 ct/kWh, just over 2% more than the previous year (2024: 11.33 ct/kWh). Price data for the fallback supply recorded as at 1 April 2025 showed that the average was 14.47 ct/kWh (2024: 15.62 ct/kWh), about 7.5% less than the previous year. The data available to the Bundesnetzagentur from the monitoring survey provide an overview of longer-term monthly developments in gas prices for household customers. A distinction is made between the prices for new and for existing customers. An index figure is calculated using a model that takes into account current gas prices on the exchange, surcharges, taxes, network tariffs, fees, and distribution costs and margin. The gas price index for each month is published on the transparency platform SMARD.de (https://www.smard.de/en/energy-data-compact/energy-data-compact) under the "Retail" tab.

Consumer advice and protection

The energy consumer advice service is the national point of contact for consumers who want information on their rights in the energy sector, applicable legal regulations or dispute resolution options. Current data and information may be found in the subsection "Retail" in the section "Developments in the electricity markets" (see section 0).

Gas metering[30]

The undertakings reported a total of 14.12mn meter locations for gas. North Rhine-Westphalia was the German state with the most meter locations (over 3.67mn), followed by Lower Saxony (2.10mn) and Baden-Württemberg (1.34mn).

Investments

Total investment and expenditure on gas metering increased in 2024 by about €3mn to some €176mn, about €157mn below the forecast. The forecast for 2025 totals €337mn, around the same level as last year. Of the total of about €176mn in 2024, around €37mn went to investments in new installations, upgrades and expansion, €63mn to investments in maintenance and renewal, and about €76mn on expenditure.

[30] Data based on responses from 669 undertakings.

Imprint

Herausgeber

Bundesnetzagentur für Elektrizität, Gas, Telekommunikation, Post und Eisenbahnen
Tulpenfeld 4
53113 Bonn

Bundeskartellamt
Kaiser-Friedrich-Straße 16
53113 Bonn

Bezugsquelle | Ansprechpartner

Bundesnetzagentur für Elektrizität, Gas,
Telekommunikation, Post und Eisenbahnen
Referat 615 - Marktbeobachtung, SMARD
Tulpenfeld 4
53113 Bonn
monitoring.energie@bundesnetzagentur.de
www.bundesnetzagentur.de

Bundeskartellamt
Arbeitsgruppe Energie-Monitoring
Kaiser-Friedrich-Straße 16
53113 Bonn
energie-monitoring@bundeskartellamt.bund.de
www.bundeskartellamt.de

As of

December 18, 2025

Bildnachweis

© [DigitalVision] via Getty Images
© picture alliance/dpa | Oliver Berg./ Foto Hr. Mundt

Text

Bundesnetzagentur
Referat 615 -
Marktbeobachtung, SMARD

Bundeskartellamt
Arbeitsgruppe Energie-Monitoring

bundesnetzagentur.de

smard.de

x.com/BNetzA

social.bund.de/@bnetza

youtube.com/BNetzA