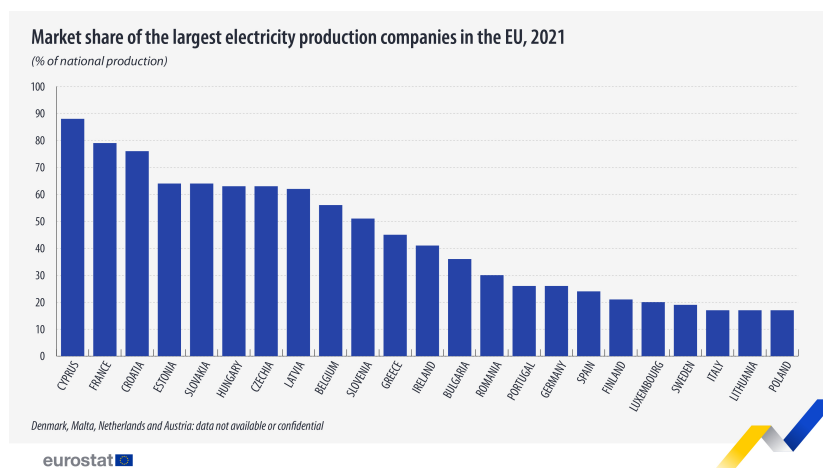


Data extracted in March 2023.
Planned article update: June 2024.

" The market share of the largest generator in the electricity market in 2021 was 88% in Cyprus, 79% in France and 76% in Croatia. "



This article takes a look at electricity markets in the [European Union \(EU\)](#) , presenting recent statistical data on the number of [electricity generating](#) and retailing companies across EU Member States, as well as Montenegro, North Macedonia, Serbia, Türkiye, Bosnia and Herzegovina, Kosovo*, Moldova and Georgia.

From 2013-2021, the number of main electricity generating companies (main = market coverage above 5 % of national electricity generation) in the European Union fluctuated between 81 and 87 companies, without a clear trend.

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

Electricity markets - generation and installed capacity

Table 1 refers to the number of companies cumulatively generating at least 95 % of net electricity generation at national level.

In 2021, it remained limited to five companies or less in four EU [Member States](#) .

Between 2020 and 2021, it was stable in five EU Member States. Increases were observed in seven Member States (Table 1).

Number of generating companies representing at least 95% of the national net electricity generation, 2013-2021

	2013	2014	2015	2016	2017	2018	2019	2020	2021
Belgium	70	100	350	320	310	329	355	329	362
Bulgaria	83	55	75	79	113	133	134	98	94
Czechia	21	45	150	220	230	278	306	350	445
Denmark	1 450	1 550	1 300	1 350	1 300	1 300	1 300	1 800	:
Germany	:	:	:	:	:	:	:	:	:
Estonia	8	10	11	11	9	9	12	13	12
Ireland	7	8	9	9	9	7	9	18	21
Greece	3	3	2	5	3	4	4	3	3
Spain	10	10	10	10	10	10	10	10	72
France	5	5	5	5	5	5	5	5	5
Croatia	2	3	6	7	12	16	24	27	31
Italy	493	652	654	715	688	813	848	911	860
Cyprus	2	2	3	3	3	3	3	6	17
Latvia	43	76	80	84	96	72	67	71	62
Lithuania	20	20	23	27	25	25	26	27	29
Luxembourg	10	10	10	10	10	10	10	10	10
Hungary	45	39	39	26	30	39	71	115	434
Malta	1	1	1	1	3	3	3	3	3
Netherlands	700	350	650	300	350	350	350	400	450
Austria	169	201	192	226	228	226	307	455	541
Poland	103	128	162	197	211	202	241	326	409
Portugal	65	66	69	54	48	62	80	83	95
Romania	15	27	29	29	32	27	29	30	28
Slovenia	3	3	3	3	3	3	4	4	3
Slovakia	10	17	21	22	22	23	24	25	23
Finland	32	35	38	37	42	44	43	35	49
Sweden	78	84	100	96	100	93	113	132	132
Norway	169	183	182	194	196	189	209	219	89
Bosnia and Herzegovina	2	2	2	3	3	3	3	3	3
Montenegro	1	1	1	1	1	2	2	3	3
Moldova	4	4	4	4	4	4	4	9	14
North Macedonia	2	3	3	4	3	3	3	4	4
Serbia	4	4	1	1	1	1	1	1	1
Türkiye	87	150	209	225	246	277	318	319	366
Kosovo*	1	1	1	1	1	1	1	1	1
Georgia	:	:	71	77	82	91	100	104	108

: data not available

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

Source: Eurostat (nrg_ind_market)



Table 1: Number of generating companies representing at least 95% of national generation 2013-2021
Source: Eurostat (nrg_ind_market)

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

Number of main electricity generating companies, 2013-2021

	2013	2014	2015	2016	2017	2018	2019	2020	2021
Belgium	2	2	3	2	2	2	2	2	2
Bulgaria	5	5	5	5	5	5	5	5	5
Czechia	1	1	1	1	1	2	2	2	2
Denmark	2	3	3	2	1	1	2	2	:
Germany	4	4	4	4	5	5	5	5	4
Estonia	1	1	1	1	1	1	1	3	3
Ireland	6	6	5	5	4	5	5	5	4
Greece	3	3	2	3	3	3	3	3	3
Spain	5	4	4	4	4	4	5	4	4
France	2	2	2	2	2	2	2	2	2
Croatia	2	2	2	2	1	1	1	1	1
Italy	4	3	3	3	3	3	3	3	3
Cyprus	1	1	1	1	1	1	1	1	1
Latvia	1	1	1	1	1	1	1	1	1
Lithuania	6	6	6	5	4	4	4	3	4
Luxembourg	3	2	4	4	4	5	5	5	4
Hungary	2	2	2	3	4	3	3	3	2
Malta	1	1	1	1	3	2	2	2	2
Netherlands	4	4	4	4	4	4	5	4	4
Austria	4	4	4	4	4	4	4	4	4
Poland	4	4	2	3	3	3	3	3	4
Portugal	4	4	4	5	5	5	5	5	5
Romania	5	3	3	3	3	4	4	4	4
Slovenia	2	2	2	2	2	2	2	2	2
Slovakia	1	1	2	2	2	2	3	3	3
Finland	4	4	4	4	4	4	4	4	4
Sweden	4	5	6	5	5	5	5	6	5
Norway	3	3	5	4	2	3	2	3	4
Bosnia and Herzegovina	1	1	1	1	1	1	1	1	1
Montenegro	1	1	1	1	1	1	2	2	2
Moldova	4	4	4	3	3	3	3	3	3
North Macedonia	2	1	1	2	2	2	2	2	2
Serbia	4	4	1	1	1	1	1	1	1
Türkiye	2	2	2	2	3	2	2	3	2
Kosovo*	1	1	1	1	1	1	1	1	1
Georgia	:	:	4	4	4	4	4	5	5

: data not available

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

Source: Eurostat (nrg_ind_market)



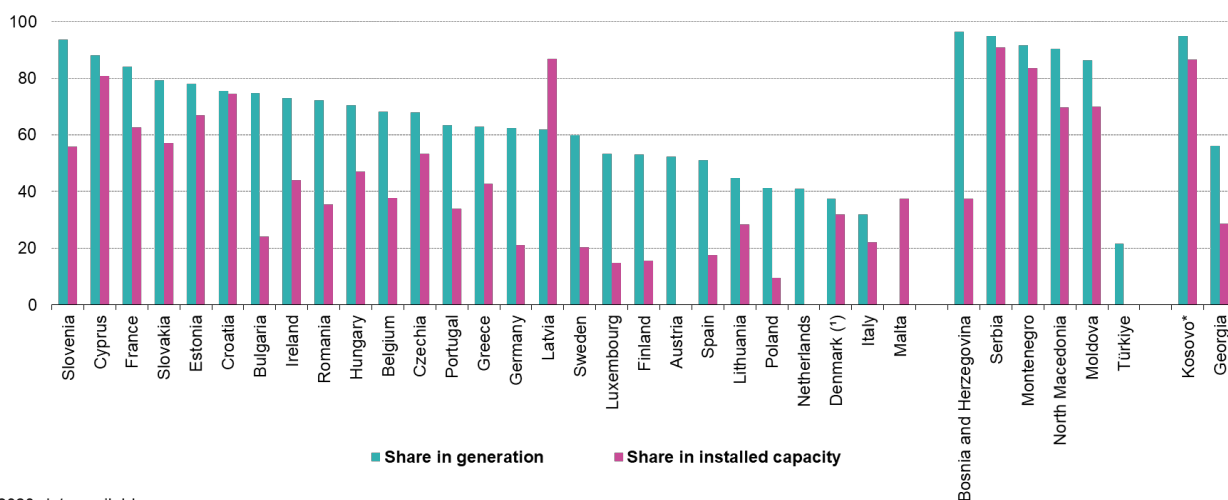
Table 2: Number of main electricity generating companies, 2013-2021 Source: Eurostat (nrg_ind_market)

Three EU Member States declared only one single enterprise had a significant share of electricity generation at national level in 2021. This is the same number of countries when compared with 2020. In Bulgaria, Portugal and Sweden there were five electricity generating companies of considerable significance.

The number of main enterprises in the EU fluctuated between 81 and 87 companies between 2013 and 2021.

As depicted in Figure 1, the lowest market coverage of main production companies was reported by Italy (32 %), which means that relatively small companies cover 68 % of Italy's total electricity market.

Cumulative market share of the main electricity generating companies and their respective installed capacity share, 2021 (in %)



(*) 2020 data available

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

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



Figure 1: Cumulative market share of the main electricity generating companies and their respective installed capacity share, 2021 (in %) Source: Eurostat (nrg_ind_market)

Table 3 displays the percentage market share of the single largest national electricity generator's production in 2021. Cyprus and France report the highest percentage shares of 88 % and 79 %, respectively. Significant market dominance with figures above 70 % for the largest electricity generators were observed in Croatia (76 %). By contrast, market shares of the largest electricity generation company below 20 % were observed in Sweden (19 %), Italy (17 %), Lithuania (17 %) and Poland (17 %).

Market share of the largest generator in the electricity market, 2013-2021 (in %)

	2013	2014	2015	2016	2017	2018	2019	2020	2021
Belgium	65	60	48	63	61	52	55	53	56
Bulgaria	37	35	32	37	36	36	39	42	36
Czechia	68	68	68	68	67	68	69	67	63
Denmark	41	37	33	35	33	33	28	27	:
Germany	32	32	32	34	32	30	26	25	26
Estonia	87	85	80	81	83	80	67	52	64
Ireland	54	51	55	47	43	44	28	31	41
Greece	67	72	71	72	59	58	49	41	45
Spain	22	24	25	25	23	22	22	20	24
France	84	87	86	83	80	82	80	78	79
Croatia	84	80	78	81	86	83	78	76	76
Italy	27	29	27	24	19	19	16	16	17
Cyprus	93	94	92	93	93	92	92	90	88
Latvia	80	55	57	59	47	63	67	57	62
Lithuania	24	21	23	14	14	16	16	23	17
Luxembourg	58	61	44	18	18	14	19	18	20
Hungary	53	54	53	53	51	55	56	55	63
Malta	100	100	100	100	:	:	:	:	:
Netherlands	:	:	:	:	:	:	:	:	:
Austria	:	:	:	:	:	:	:	:	:
Poland	17	18	17	16	18	17	18	17	17
Portugal	44	47	43	47	40	43	38	39	26
Romania	27	30	26	28	23	28	27	28	30
Slovenia	57	52	51	54	49	51	50	50	51
Slovakia	84	82	73	71	71	70	66	64	64
Finland	24	23	22	22	21	21	22	23	21
Sweden	19	18	20	19	18	19	18	19	19
Norway	:	:	:	:	:	:	:	:	:
Bosnia and Herzegovina	46	49	48	44	46	41	38	41	39
Montenegro	99	99	99	98	96	93	91	87	86
Moldova	79	76	79	80	80	78	73	71	69
North Macedonia	90	91	90	81	78	82	76	71	62
Serbia	54	51	99	99	99	98	96	97	95
Türkiye	:	:	:	:	:	:	:	:	:
Kosovo*	99	99	97	96	97	94	94	95	95
Georgia	:	:	31	31	31	33	28	25	28

: data not available

c confidential data

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

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

Source: Eurostat (nrg_ind_market)

eurostat 

Table 3: Market share of the largest generator in the electricity market, 2013-2021 (%) Source: Eurostat (nrg_ind_market)

EU Member States also provided information on newly installed electricity generation capacity in 2021. Table 4 shows that the newly installed capacity increased from 34.7 Gigawatts (GW) to 40.9 GW compared with 2020. This increase is mainly due to significant changes (in absolute terms) in Germany (+2.7 GW), then France (+1.5 GW), and Poland (+1.2 GW).

New capacity connected during the year, 2013-2021 (in MW)

	2013	2014	2015	2016	2017	2018	2019	2020	2021
Belgium	1253	920	367	1043	1177	529	1270	1643	516
Bulgaria	127	51	59	14	8	420	25	49	216
Czechia	:	769	17	123	278	10	290	:	87
Denmark	889	163	434	320	505	786	296	455	:
Germany	8638	10020	10972	8797	8460	7446	8214	10000	12667
Estonia	21	64	229	6	40	20	10	90	55
Ireland	237	330	856	376	220	208	381	215	478
Greece	417	151	0	0	0	500	0	0	0
Spain	703	28	910	38	94	453	6738	4516	4338
France	:	:	:	:	2763	2504	2397	2413	3940
Croatia	142	104	371	80	123	40	77	179	236
Italy	3057	1275	1163	1376	1090	1390	1622	1206	1761
Cyprus	75	0	0	0	0	0	0	0	0
Latvia	248	17	9	0	14	0	22	7	0
Lithuania	86	14	150	78	22	28	24	113	222
Luxembourg	24	215	15	69	17	6	63	44	91
Hungary	35	88	0	0	0	0	466	499	422
Malta	0	0	0	0	210	0	0	0	0
Netherlands	1862	2805	2161	1459	864	2031	2785	6134	4958
Austria	668	769	594	905	381	864	427	370	1227
Poland	942	673	1340	993	2173	949	3181	4399	5632
Portugal	256	376	602	1112	357	238	378	211	324
Romania	2264	452	387	203	14	20	9	3	41
Slovenia	29	576	27	6	18	373	30	66	158
Slovakia	115	135	20	88	4	9	43	1	79
Finland	531	441	133	719	1100	108	259	325	871
Sweden	1034	1470	992	864	437	1676	1698	1751	2640
Norway	:	:	:	:	:	:	:	:	:
Bosnia and Herzegovina	1	10	21	343	33	77	45	24	78
Montenegro	1	0	9	6	75	4	49	17	2
Moldova	2	3	0	2	10	21	0	2	31
North Macedonia	24	22	34	5	12	6	11	15	14
Serbia	0	0	2	58	12	250	186	226	230
Türkiye	6949	6327	6211	6528	3950	3331	4135	4453	4211
Kosovo*	3	0	5	25	2	38	33	11	:
Georgia	:	:	247	151	244	18	86	253	8

: data not available

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

Source: Eurostat (nrg_ind_market)

eurostat 

Table 4: New capacity connected during the year, 2013-2021 (in Megawatts) Source: Eurostat (nrg_ind_market)

Electricity markets - retail

All EU Member States with the exception of Ireland, as well as Montenegro, North Macedonia, Serbia, Türkiye, Bosnia and Herzegovina, Kosovo, Moldova and Georgia reported information concerning the retailing (sales) sector.

Table 5 presents information on the total number of retailers that sell electricity to final customers. When looking at the estimated number of retailers, it increased in the EU from 3437 in 2013 to 4378 in 2021.

Total number of electricity retailers to final consumers, 2013-2021

	2013	2014	2015	2016	2017	2018	2019	2020	2021
Belgium	42	37	52	60	60	56	55	58	58
Bulgaria	24	29	37	54	57	53	48	50	55
Czechia	382	380	390	389	399	411	409	419	420
Denmark	49	50	49	55	39	38	41	44	:
Germany	1177	1226	1238	1404	1404	1485	1430	1421	1423
Estonia	49	53	46	49	46	45	50	47	61
Ireland	7	7	8	9	12	12	14	14	13
Greece	7	8	8	10	19	25	26	25	25
Spain	225	273	267	300	291	323	341	366	397
France	164	167	171	178	185	172	162	171	177
Croatia	6	7	7	7	9	9	8	8	8
Italy	472	534	579	627	638	705	775	753	800
Cyprus	1	1	1	1	1	1	1	1	3
Latvia	8	12	17	21	26	25	22	20	22
Lithuania	24	23	17	21	22	21	22	24	17
Luxembourg	9	10	10	10	10	10	10	9	10
Hungary	44	51	52	42	42	39	37	38	37
Malta	1	1	1	1	1	1	1	1	1
Netherlands	45	46	51	53	48	48	52	53	52
Austria	154	149	155	162	171	171	174	171	171
Poland	145	140	134	134	190	185	208	118	120
Portugal	13	14	19	25	27	29	32	34	36
Romania	60	86	95	105	105	96	91	88	92
Slovenia	14	13	18	20	21	23	22	22	23
Slovakia	60	66	72	74	71	73	68	66	66
Finland	100	100	100	100	100	92	92	86	81
Sweden	155	160	172	179	171	166	184	193	210
Norway	195	197	191	191	197	188	191	189	232
Bosnia and Herzegovina	28	27	26	26	26	24	24	20	17
Montenegro	2	2	2	5	5	5	6	6	6
Moldova	4	4	4	4	4	6	7	7	9
North Macedonia	5	6	7	9	13	12	13	17	18
Serbia	2	7	8	14	19	18	13	11	11
Türkiye	774	260	255	213	216	216	214	217	233
Kosovo*	1	1	1	3	3	3	3	3	3
Georgia	:	:	3	3	3	2	2	2	4

: data not available

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

Source: Eurostat (nrg_ind_market)

eurostat 

Table 5: Total number of electricity retailers to final consumers, 2013-2021. Estimated, as some of the retailers operate in several national markets. Source: Eurostat (nrg_ind_market)

Number of main electricity retailers, 2013-2021

	2013	2014	2015	2016	2017	2018	2019	2020	2021
Belgium	5	4	4	4	3	4	4	4	4
Bulgaria	3	5	3	5	6	5	5	5	6
Czechia	3	3	3	3	3	3	3	4	4
Denmark	6	6	6	7	6	5	5	5	:
Germany	:	:	:	:	:	:	:	:	:
Estonia	1	2	2	2	6	5	5	3	4
Ireland	4	4	4	4	4	4	4	4	5
Greece	1	1	1	1	1	1	3	4	5
Spain	4	3	4	4	4	4	4	3	4
France	2	2	2	2	2	2	3	3	3
Croatia	2	3	3	2	3	2	2	3	3
Italy	2	2	2	2	2	2	3	4	4
Cyprus	1	1	1	1	1	1	1	1	1
Latvia	2	3	2	2	2	3	3	4	5
Lithuania	6	6	6	6	6	7	6	5	3
Luxembourg	3	3	3	3	3	3	3	3	:
Hungary	5	6	6	5	4	6	7	6	5
Malta	1	1	1	1	1	1	1	1	1
Netherlands	4	3	4	4	4	4	6	6	6
Austria	7	7	7	6	6	7	7	7	7
Poland	6	6	5	4	4	4	4	4	4
Portugal	4	4	5	5	5	5	5	5	5
Romania	5	5	5	5	5	4	5	6	6
Slovenia	8	9	8	8	8	9	9	7	6
Slovakia	4	4	3	5	5	5	5	6	5
Finland	3	3	4	5	4	4	6	4	6
Sweden	7	7	7	7	7	7	5	6	6
Norway	6	6	6	6	5	6	6	5	5
Bosnia and Herzegovina	4	4	4	4	4	4	3	3	3
Montenegro	2	2	2	1	1	1	1	1	1
Moldova	3	3	2	2	2	2	2	3	3
North Macedonia	3	2	3	3	3	3	3	4	4
Serbia	1	1	1	1	1	1	1	1	1
Türkiye	4	3	5	5	7	7	7	5	4
Kosovo*	1	1	1	1	1	1	1	1	1
Georgia	:	:	2	2	2	2	2	2	4

: data not available

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

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

Source: Eurostat (nrg_ind_market)

eurostat 

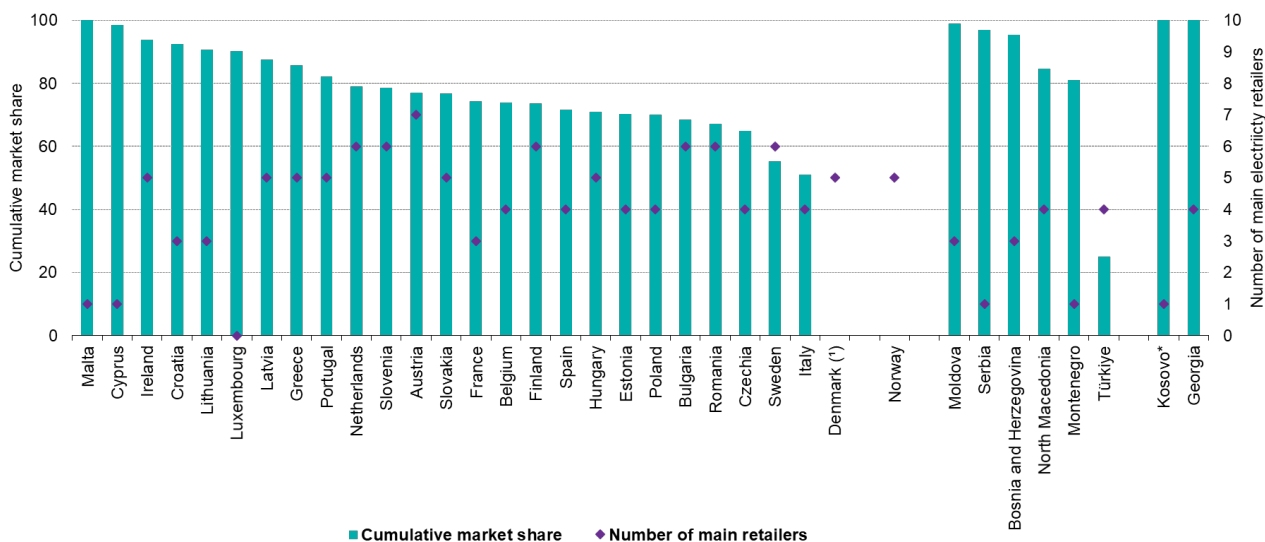
Table 6: Number of main electricity retailers, 2013-2021 Source: Eurostat (nrg_ind_market)

Austria had seven electricity retailers with more than 5 % market share each in 2021. This was the largest number in the EU. Cyprus and Malta, had one main retailer each (see Table 6). Germany did not report the number of main retailers.

Figure 2 illustrates the number of main electricity retailers to final consumers and their cumulative market shares for all EU Member States that reported the data, as well as for Montenegro, North Macedonia, Serbia, Türkiye, Bosnia and Herzegovina, Kosovo, Moldova and Georgia.

Looking at the remaining market, which is the market covered by non-main retail companies, their market share is largest in Italy and Sweden (49 % and 44.7 %, respectively). It is below 20 % in nine out of the 25 EU Member States that reported this indicator.

Number of main electricity retailers and their cumulative market share, 2021



(*) 2020 data available

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

No data available for Germany.

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

Source: Eurostat (nrg_ind_market)



Figure 2: Number of main electricity retailers and their cumulative market share, 2021 Source: Eurostat (nrg_ind_market)

Source data for tables and graphs

- [Download Excel file](#)

Data sources

The information on electricity market indicators is collected via a voluntary data collection. Although the participation of countries in this voluntary data collection is very high, sometimes the information on individual indicators is not available or is confidential.

The full dataset is available at

- [Energy market indicator \(nrg_ind_market\)](#) .

Context

The electricity market was liberalised for small business consumers in July 2004 and for all consumers in July 2007. However, initially the opening-up of markets faced a number of shortcomings and several legal packages followed. The most relevant recent ones are:

- On 1 January 2020, the Regulation (EU) No 2019/943 of 5 June 2019 [on the internal market for electricity](#) entered into force. An important part of the new electricity market design, agreed under the Clean energy for all Europeans package, the regulation establishes the fundamental principles for an efficient electricity market.
- In the framework of [Clean energy for all Europeans package](#) , the Directive (EU) 2019/944 of 5 June 2019 [on common rules for the internal market for electricity](#) and amending Directive 2012/27/EU, was adopted. The focus of Directive (EU) 2019/944, among others, is: "The internal market for electricity, which has been progressively implemented throughout the Union since 1999, aims, by organising competitive electricity markets across country borders, to deliver real choice for all Union final customers, be they citizens or businesses, new business opportunities, competitive prices, efficient investment signals and higher standards of service, and to contribute to security of supply and sustainability."

- The Clean energy for all Europeans package key part is to make the EU electricity market fit for the clean energy transition.
- Regulation (EU) 2019/942 of 5 June 2019 [establishing a European Union Agency for the Cooperation of Energy Regulators](#) .

Other articles

- [Energy statistics - an overview](#)
- [Electricity price statistics](#)
- [Electricity production, consumption and market overview](#)
- [Businesses in the electricity, gas, steam and air conditioning supply sector](#)
- [Energy production and imports](#)
- [Natural gas market indicators](#)
- [Natural gas price statistics](#)

Database

- [Energy \(nrg\)](#) , see:

Energy statistics - market structure indicators - natural gas and electricity (nrg_market)

Energy market indicator (nrg_ind_market)

Energy Statistics - quantities (nrg_quant)

Energy Statistics - quantities, annual data (nrg_quanta)

Supply, transformation and consumption - commodity balances (nrg_cb)

Supply, transformation and consumption of electricity (nrg_cb_e)

Energy Statistics - quantities, monthly data (nrg_quantm)

Energy statistics - supply, transformation, consumption (nrg_10m)

Supply of electricity - monthly data (nrg_105m)

Energy statistics - prices of natural gas and electricity (nrg_price)

Energy statistics - natural gas and electricity prices (from 2007 onwards) (nrg_pc)

Electricity prices for household consumers - bi-annual data (from 2007 onwards) (nrg_pc_204)

Electricity prices for non-household consumers - bi-annual data (from 2007 onwards) (nrg_pc_205)

Household consumption volumes of electricity by consumption bands (nrg_pc_204_v)

Non-household consumption volumes of electricity by consumption bands (nrg_pc_205_v)

Electricity prices components for household consumers - annual data (from 2007 onwards)
(nrg_pc_204_c)

Electricity prices components for non-household consumers - annual data (from 2007 onwards)
(nrg_pc_205_c)

Dedicated section

- [Energy](#)

Visualisations

- [Visualise energy prices](#)
- [Energy balances made easy](#)
- [Energy indicators made easy](#)
- [Sankey diagram - Visualise energy flows](#)
- [Visualise energy scenarios with an interactive tool](#)

Methodology

- [Energy Statistics - quantities, annual data](#) (ESMS metadata file — nrg_quant_esms)

Legislation

- [Directive \(EU\) 2019/944](#) of 5 June 2019 on common rules for the internal market for electricity and amending Directive 2012/27/EU
- [Summaries of EU legislation: Internal market in electricity \(from 2021\)](#)
- [Regulation \(EU\) No 2019/942](#) of 5 June 2019 establishing a European Union Agency for the Cooperation of Energy Regulators
- [Summaries of EU legislation: Agency for the cooperation of national energy regulators](#)
- [Regulation \(EU\) No 2019/943](#) of 5 June 2019 on the internal market for electricity
- [Summaries of EU legislation: Cross-border exchanges in electricity](#)

External links

- [Eurelectric - Electricity for Europe - Statistics](#)