



MONTHLY RETAIL MARKET ASSESSMENT HIGHLIGHTS

26 May to 25 June 2024

Document Information Classification: Public

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RCOA

SUMMARY OF OBSERVATION

- Sixteen (16) new Contestable Customers (CCs) registered during the June 2024 billing period, 13 of which came from Luzon.
- First three (3) CCs from Mindanao registered under the Retail Competition and Open Access (RCOA).
- Two (2) suppliers were left with no CCs due to switching to other Suppliers.
- Fifteen (15) out of the eighteen (18) switches were due to the expiration of supply contracts while one (1) CC transferred to RCOA from GEOP.
- Two (2) CCs ceased participation in the RCOA Market due to termination of lease of contract and demolition of their respective facility.

AT A GLANCE



Total no. of Registered Contestable Customers (CC)

2,051  **0.70%**

Previous Month: 2,035



Total no. of Registered Suppliers Serving CCs

32  **5.88%**

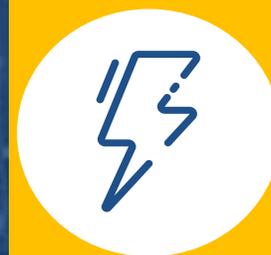
Previous Month: 34



Total no. of CC that Switched to other Supplier

18  **21.05%**

Previous Month: 23



Total CC's Electricity Consumption, in terms of GWh

2,004  **1.24%**

Previous Month: 1,979

CONTESTABLE CUSTOMERS

2,051

Total Registered



COMMERCIAL

1,090 Customers

Previous Month

1,083 Customers



INDUSTRIAL

961 Customers

Previous Month

952 Customers

LUZON

1,794

Previous Month: 1,781

VISAYAS

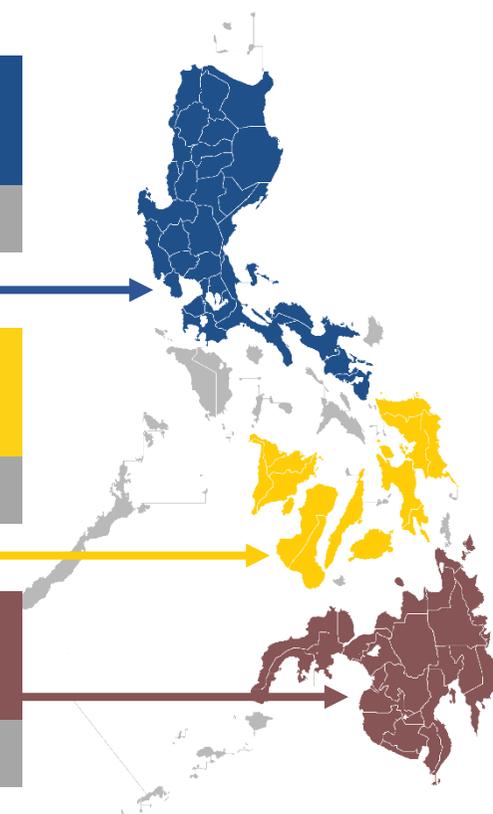
254

Previous Month: 254

MINDANAO

3

Previous Month: 0



500-749kW

339 Customers

Previous Month

334 Customers

750-999kW

438 Customers

Previous Month

437 Customers

1MW & ABOVE

1,274 Customers

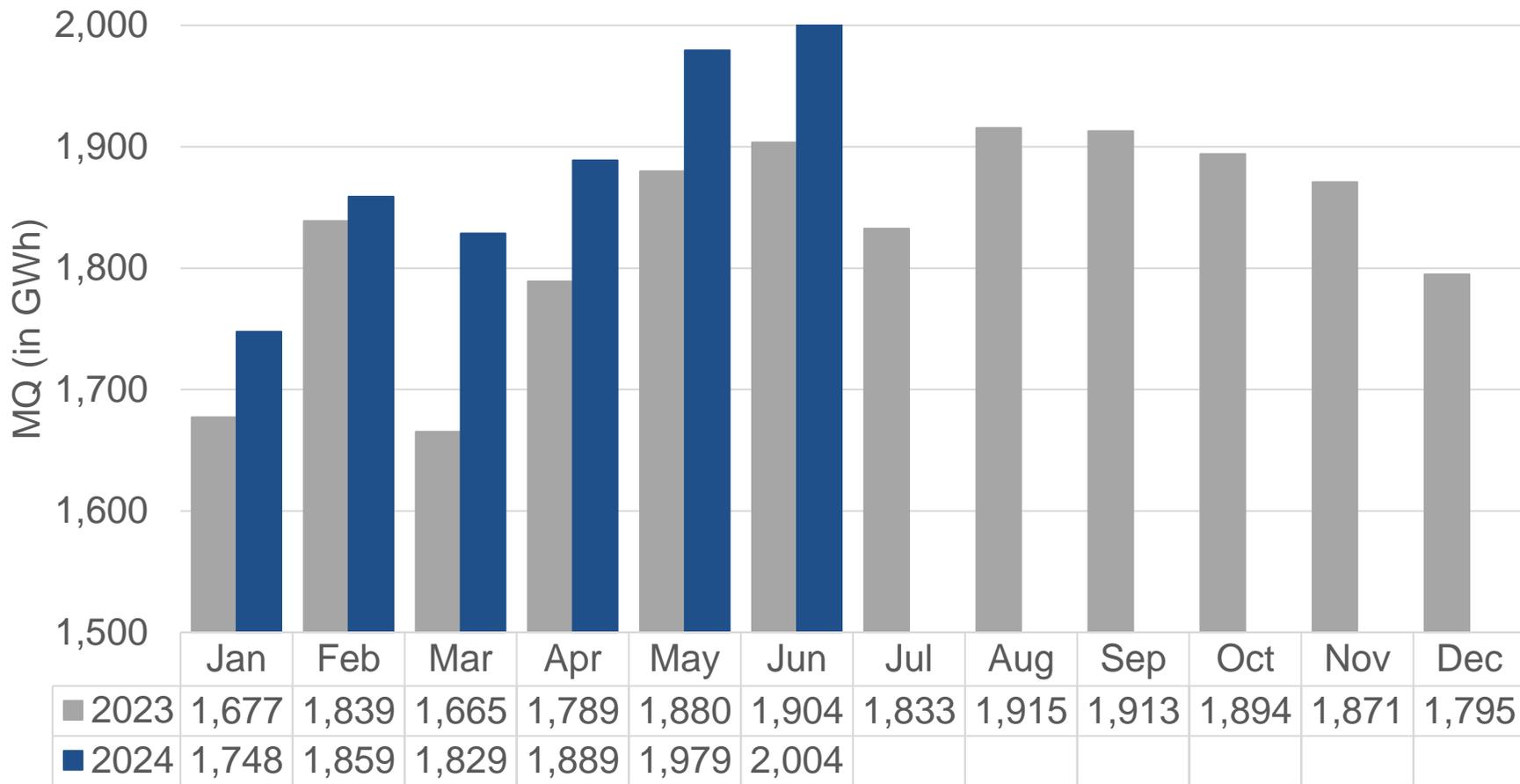
Previous Month

1,264 Customers

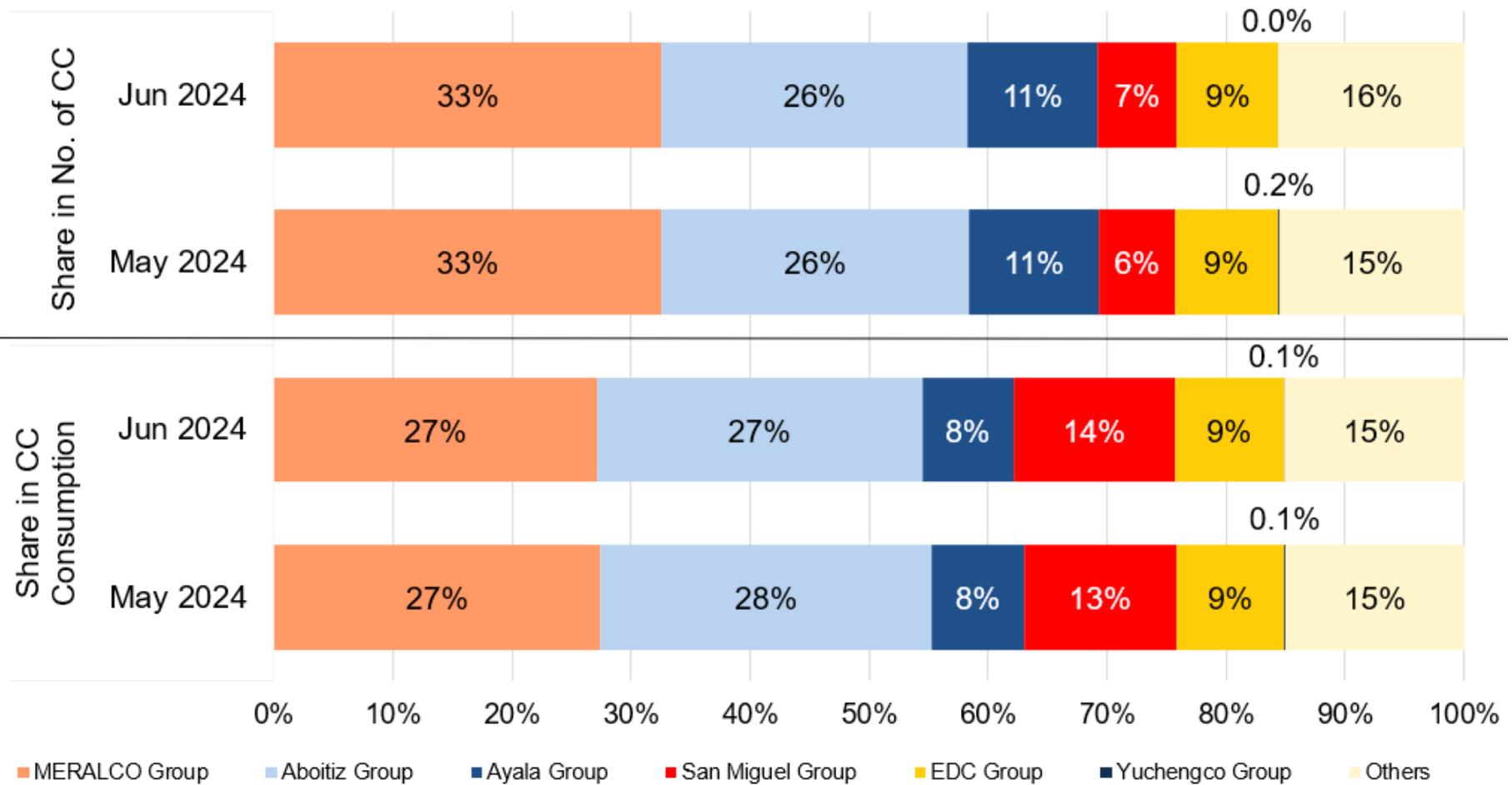
RETAIL ELECTRICITY SUPPLIERS

	Registered	Serving CCs
R etail E lectricity S upplier	41	30
Previous Month	41	32
L ocal R etail E lectricity S upplier	15	2
Previous Month	15	2
S upplier O f L ast R esort	27	0
Previous Month	27	0

MONTHLY CONSUMPTION



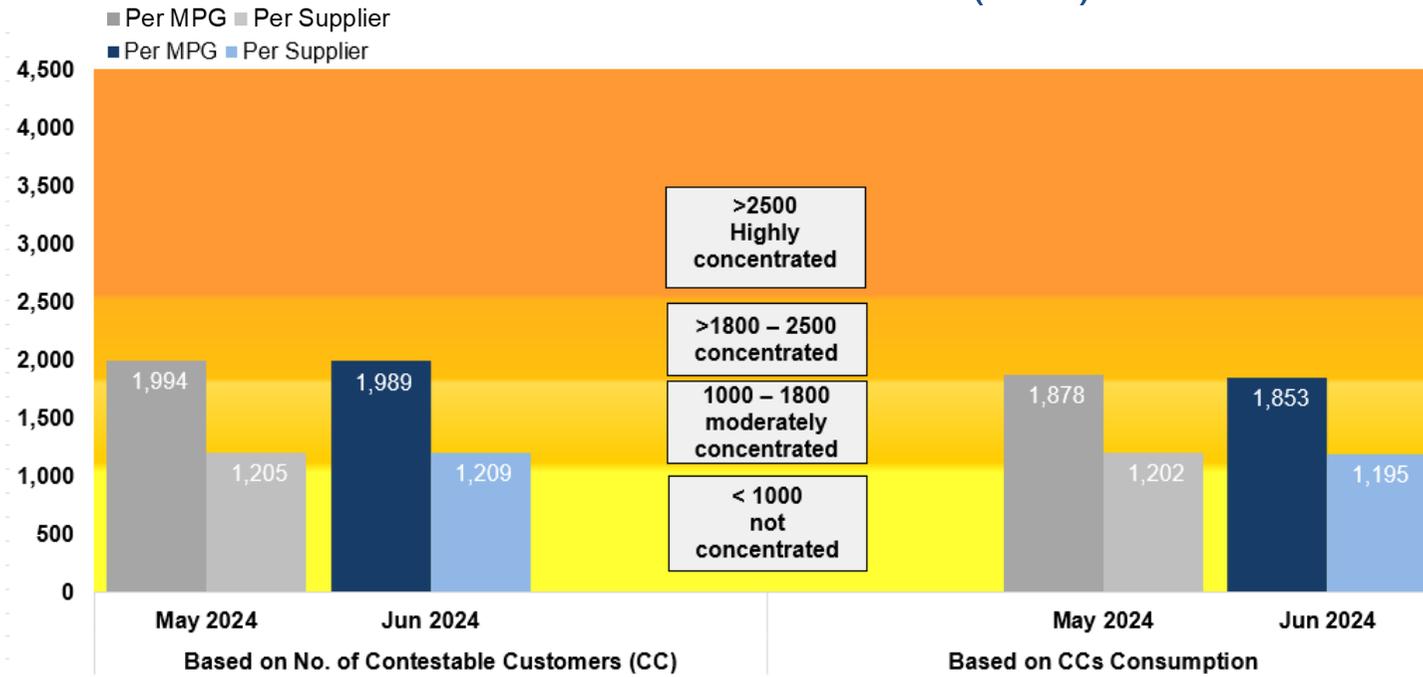
MARKET SHARE



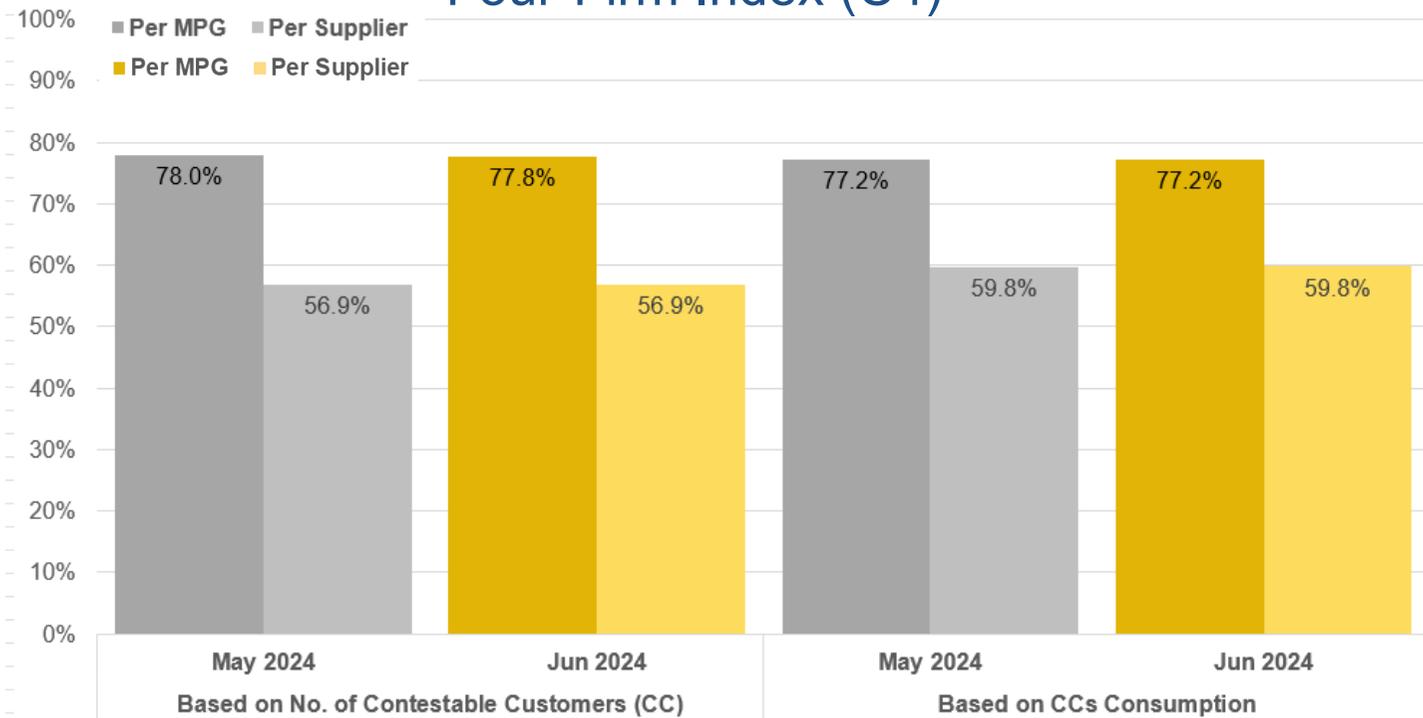
The MERALCO Group remained to be the top market participant group with the highest percentage share for the number of engaged CCs. However, in terms of served energy consumption, the MERALCO shared the highest percentage share with the Aboitiz Group.

MARKET CONCENTRATION

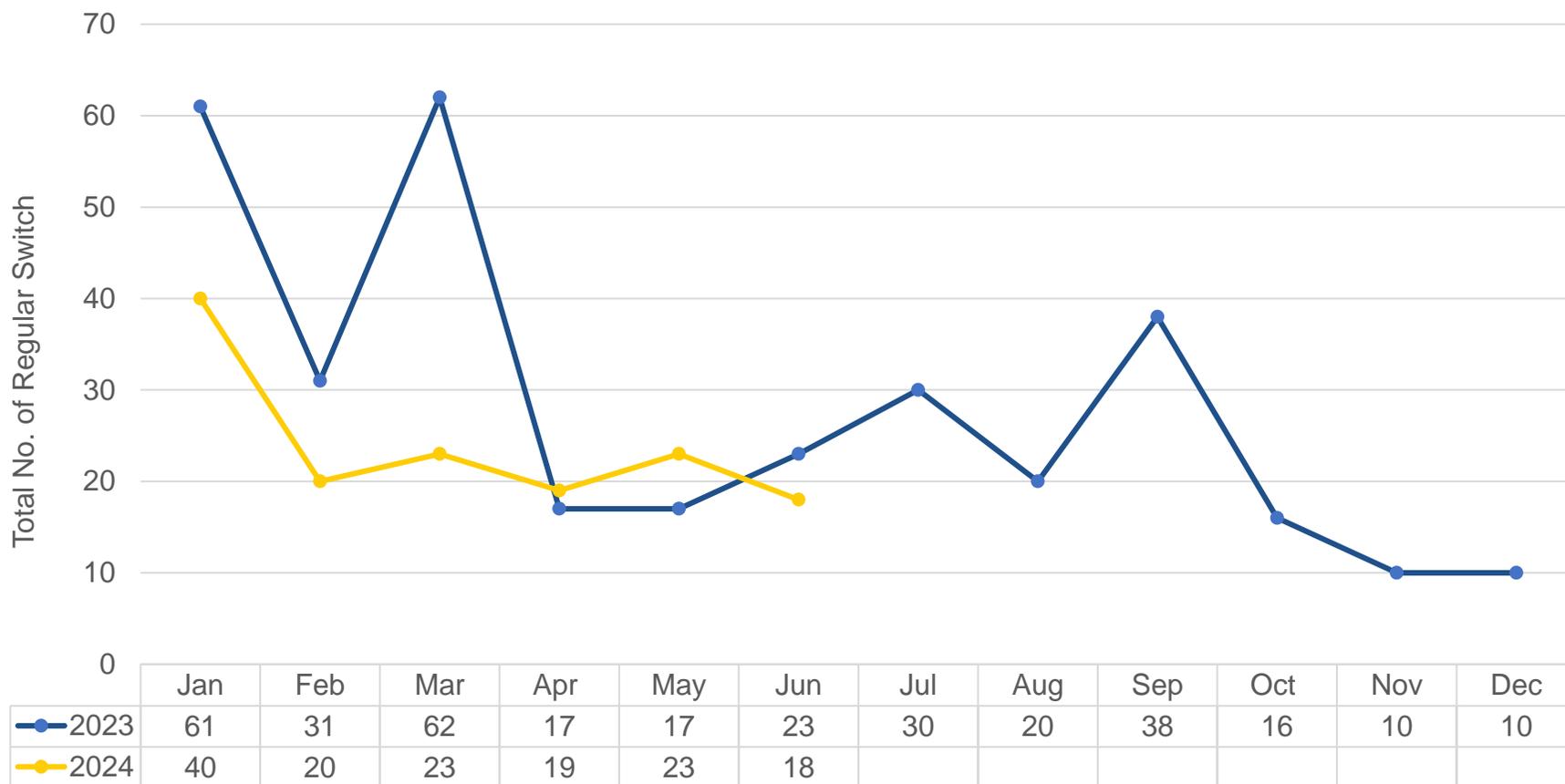
Herfindahl-Hirschman Index (HHI)



Four-Firm Index (C4)



CUSTOMER SWITCHING



Regular Switch - Commercial transfer of a Contestable Customer from one Supplier to another.

GEOP

SUMMARY OF OBSERVATION

- Eight (8) new GEOP End-Users (GEUs) were noted to have entered the market in the June 2024 billing period.
- Two (2) GEUs switched to another Renewable Energy Supplier (RE Supplier), while one (1) GEU transferred to RCOA.
- Most of the registered GEUs have contestability between 100 – 499 kW, while only one (1) GEU was noted to have had an average peak demand of 1 MW and above.

AT A GLANCE



Total no. of Registered GEOP End-Users (GEU)

359



2.09%

Previous Month: 352



Total no. of Registered Suppliers Serving GEUs

10



0.00%

Previous Month: 10



Total no. of GEUs that Switched to other RE Supplier

2



100%

Previous Month: 1



Total GEU's Electricity Consumption, in terms of GWh

49



3.07%

Previous Month: 47

359

Total Registered



COMMERCIAL
256 Customers
Previous Month
248 Customers

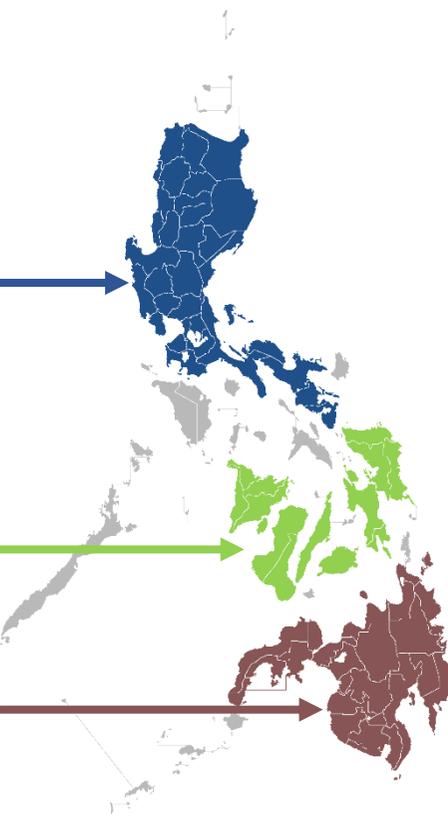


INDUSTRIAL
103 Customers
Previous Month
104 Customers

LUZON
273
Previous Month: 268

VISAYAS
86
Previous Month: 84

MINDANAO
0
Previous Month: 0

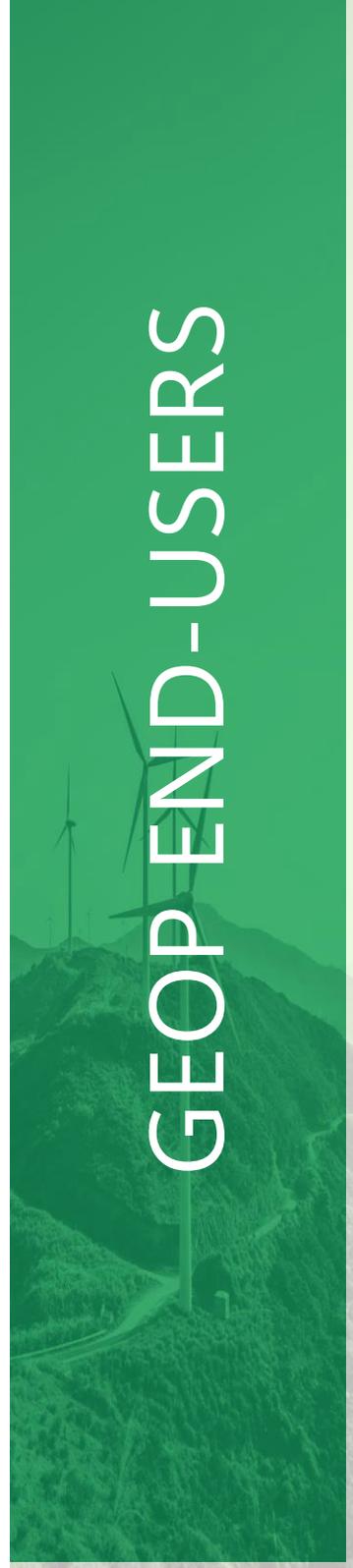


100-499kW
342 Customers
Previous Month
335 Customers

500-749kW
9 Customers
Previous Month
9 Customers

750-999kW
7 Customers
Previous Month
7 Customers

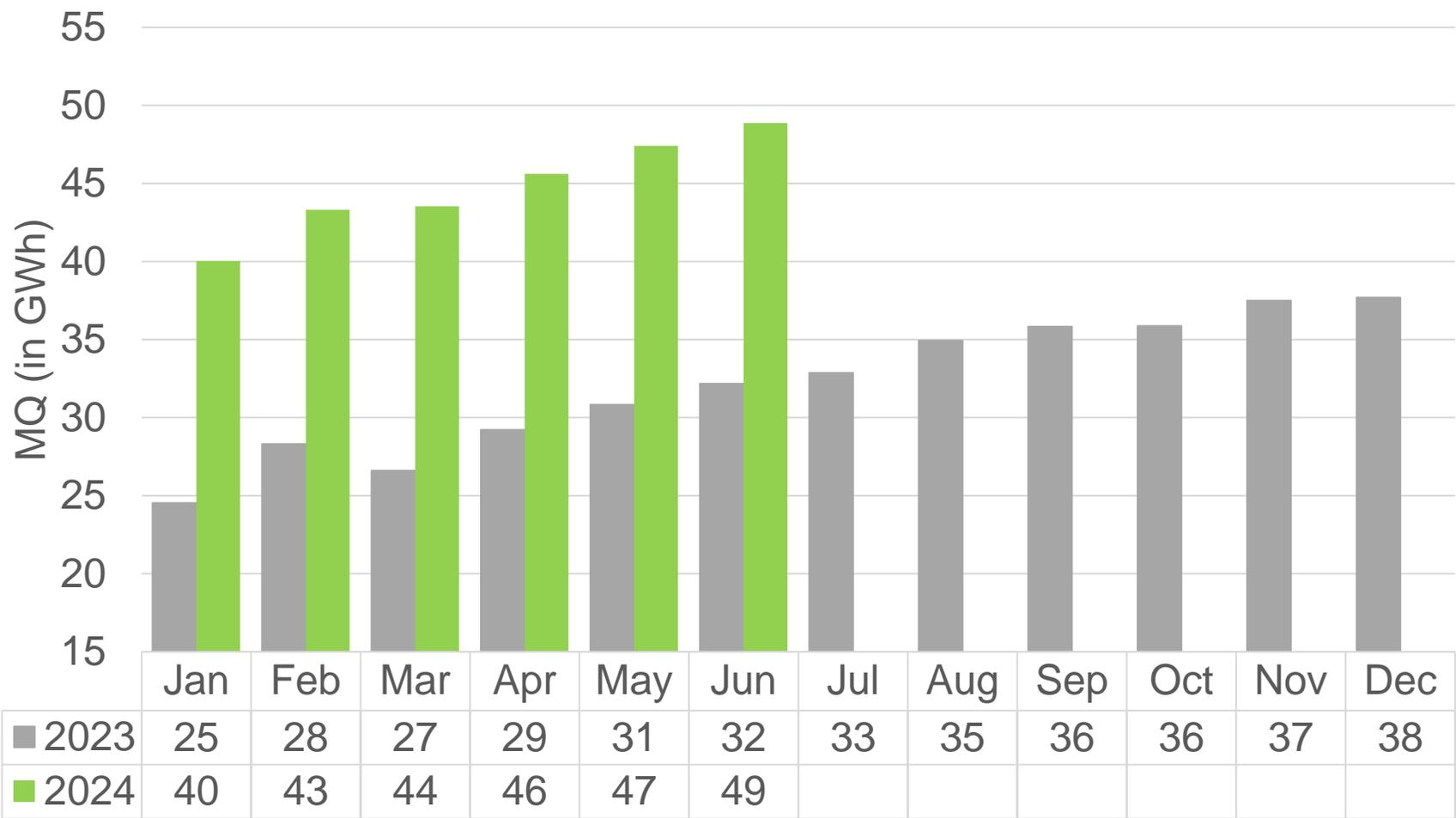
1MW & ABOVE
1 Customer
Previous Month
1 Customer



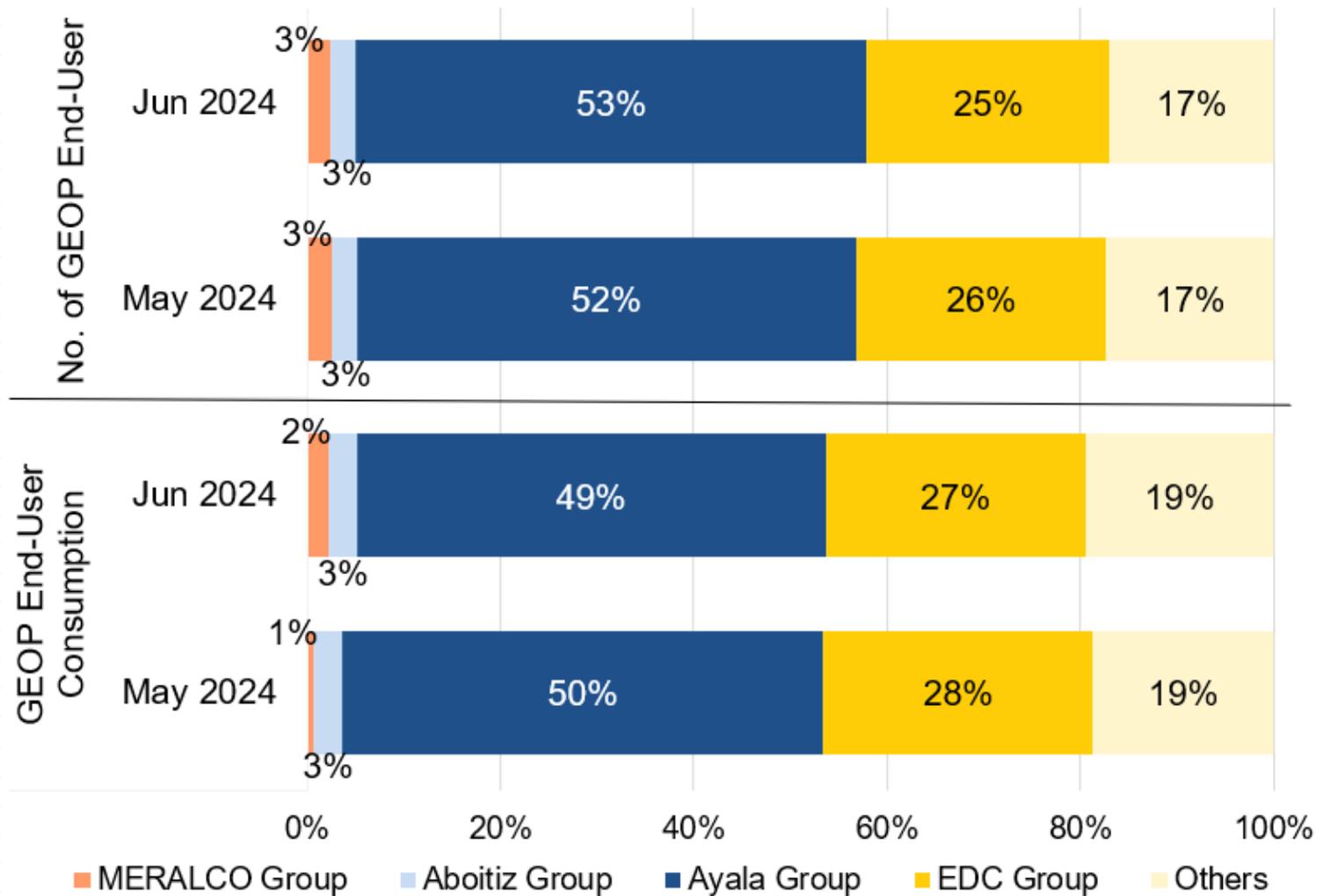
	Registered	Serving GEUs
R enewable E nergy S upplier	17	10
Previous Month	17	10
L ocal R etail E lectricity S upplier	1	1
Previous Month	1	1
S upplier O f L ast R esort	16	-
Previous Month	16	0



RE SUPPLIERS

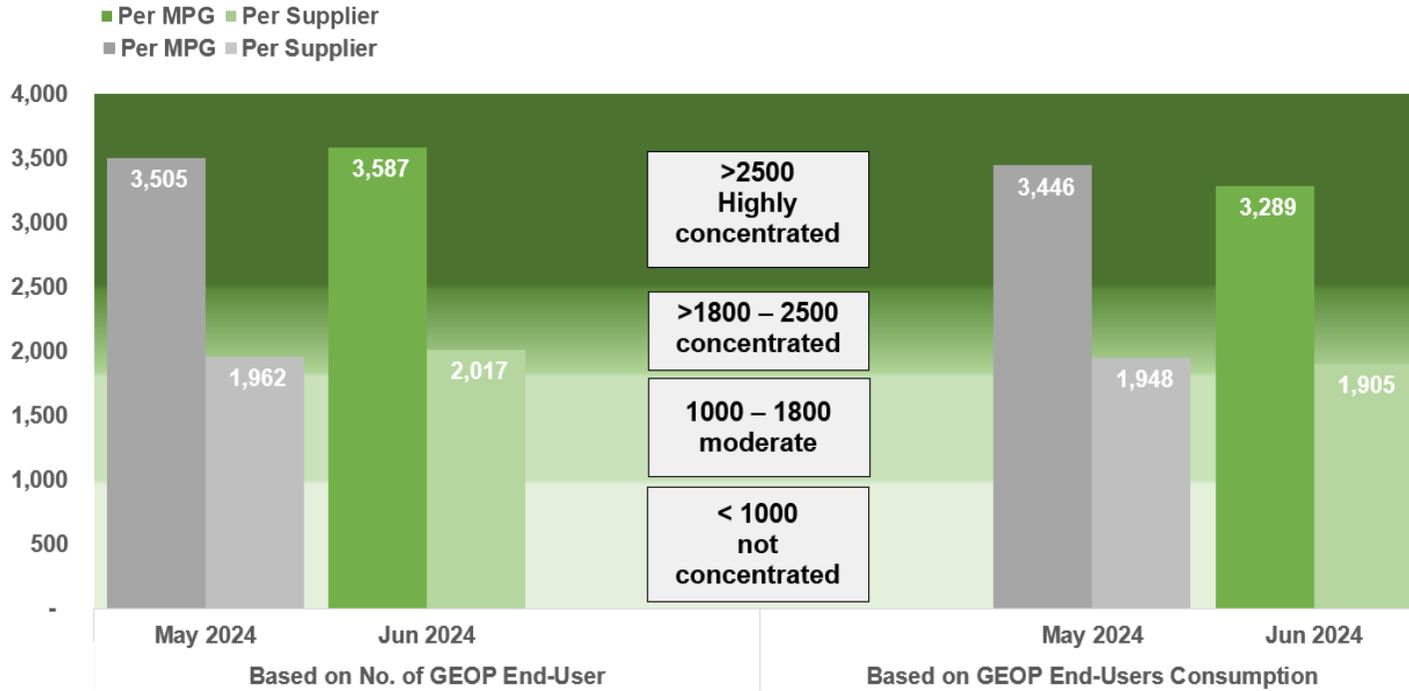


MONTHLY CONSUMPTION

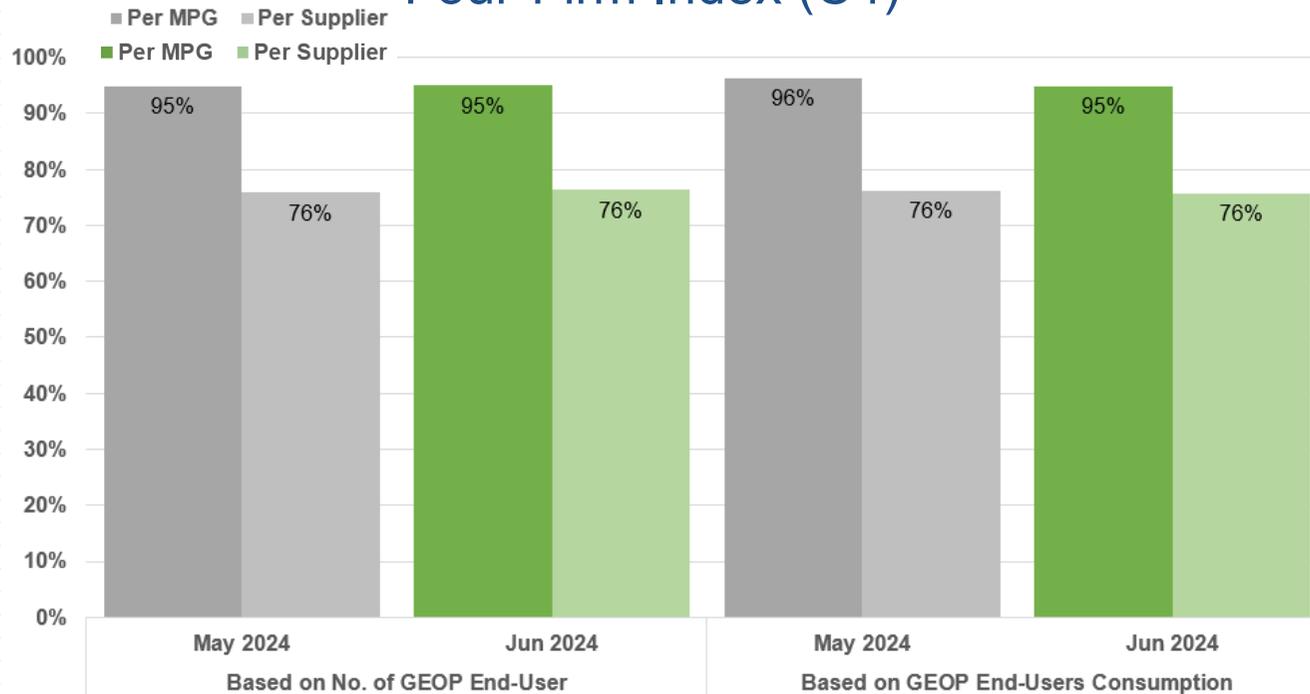


Keeping with the trend from previous months, Ayala Group remained to be the top market participant group with the highest percentage share for both the number of engaged GEUs and served energy consumption.

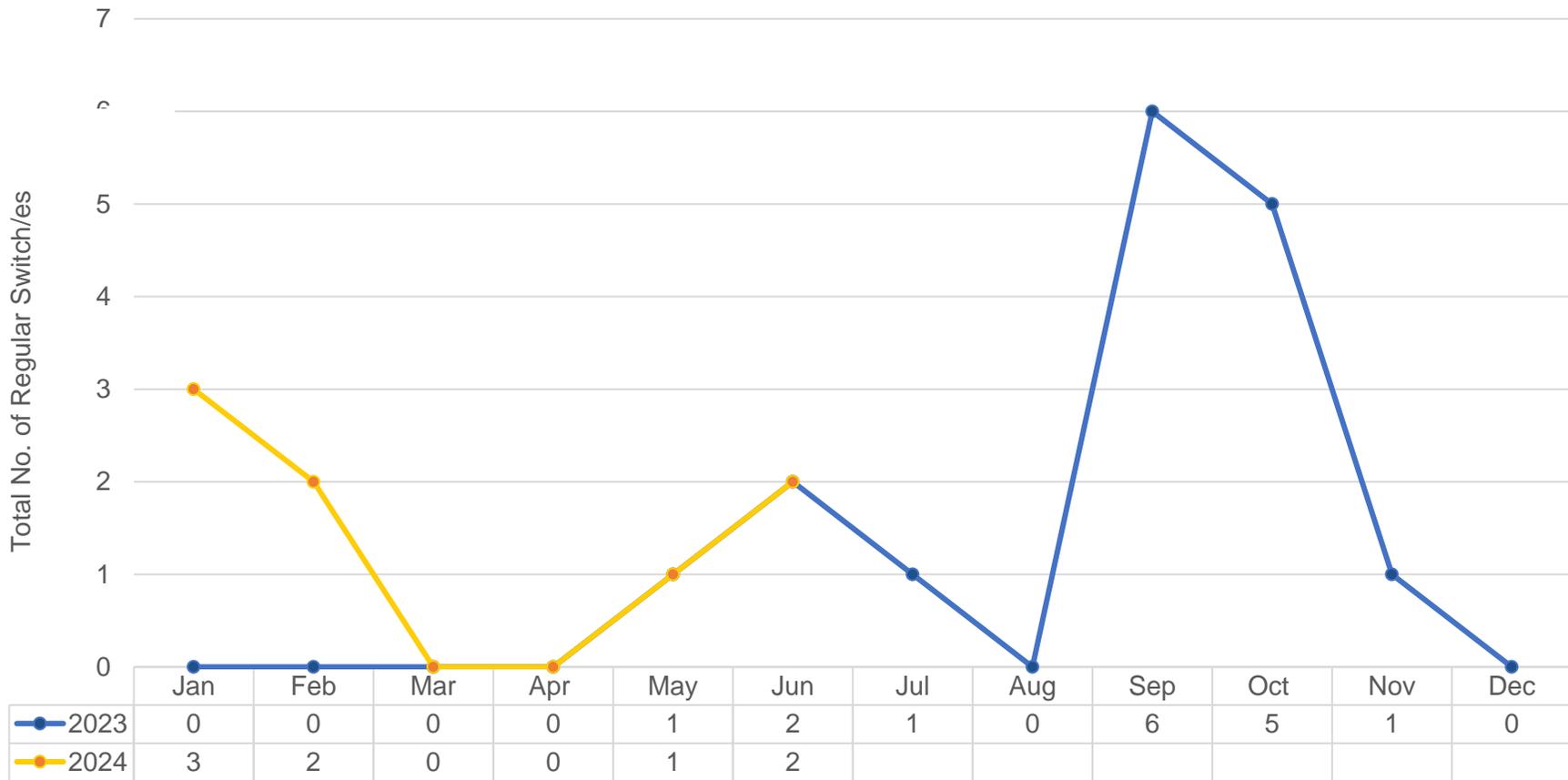
Herfindahl-Hirschman Index (HHI)



Four-Firm Index (C4)



MARKET CONCENTRATION



Regular Switch - The commercial transfer of a GEOP End-User from one RE Supplier to another RE Supplier.



CUSTOMER SWITCHING

LIST OF REGISTERED SUPPLIERS

No.	Market Participant Name	RCOA	GEOP	No.	Market Participant Name	RCOA	GEOP
1	Aboitiz Energy Solutions, Inc.	✓	✓	22	KEPCO SPC Power Corporation	✓	
2	AC Energy and Infrastructure Corporation	✓		23	Kratos RES, Inc.	✓	✓
3	ACEN Corporation (Formerly known as AC Energy Corporation)	✓	✓	24	Mabuhay Energy Corporation	✓	
4	ACX3 Capital Holdings Inc.	✓		25	Masinloc Power Partners Company Limited	✓	
5	Advent Energy, Inc.	✓	✓	22	Mazzaraty Energy Corporation	✓	
6	Alsons Power Supply Corporation	✓		26	MegawattSolutions Inc.	✓	
7	Anda Power Corporation RES	✓		27	MeridianX Inc.	✓	
8	AP Renewables Inc.	✓	✓	28	PetroGreen Energy Corporation	✓	
9	Asiapac Green Renewable Energy Corp.	✓		29	Premier Energy Resources Corporation	✓	
10	Bac-Man Geothermal, Inc.	✓	✓	30	Prism Energy, Inc.	✓	✓
11	Citicore Energy Solutions, Inc.	✓	✓	31	Rockport Power Inc.	✓	
12	Corenergy, Inc.	✓		32	SEM-Calaca RES Corporation	✓	
13	DirectPower Services, Inc.	✓	✓	33	Shell Energy Philippines, Inc. - RES	✓	✓
14	Ecozone Power Management, Inc.	✓		34	Limay Power Inc. (formerly SMC Consolidated Power Corporation)	✓	
15	EEI Energy Solutions Corporation	✓	✓	35	SN Aboitiz Power- Magat, Inc.	✓	✓
16	FDC Retail Electricity Sales Corporation	✓		36	SN Aboitiz Power-RES, Inc.	✓	✓
17	First Gen Energy Solutions, Inc.	✓	✓	37	Solar Philippines Retail Electricity, Inc.	✓	✓
18	Global Energy Supply Corporation	✓		38	TeaM (Philippines) Energy Corporation	✓	
19	GNPower Ltd. Co.	✓		40	Therma Luzon, Inc.	✓	✓
20	Green Core Geothermal, Inc.	✓	✓	41	Vantage Energy Solutions and Management, Inc.	✓	
21	Jin Navitas Electric Corporation	✓					

LIST OF REGISTERED LOCAL SUPPLIERS

No.	Market Participant Name	RCOA	GEOP	No.	Market Participant Name	RCOA	GEOP
1	Batangas II Electric Cooperative, Inc.	✓		9	Mactan Enerzone Corporation	✓	
2	Camarines Sur II Electric Cooperative, Inc.	✓		10	Manila Electric Company	✓	✓
3	Cebu I Electric Cooperative, Inc.	✓		11	Nueva Ecija I Electric Cooperative, Inc.	✓	
4	Cebu II Electric Cooperative, Inc.	✓		12	San Fernando Electric Light & Power Co., Inc.	✓	
5	Central Negros Electric Cooperative, Inc.	✓		13	Subic Enerzone Corporation	✓	
6	Clark Electric Distribution Corporation	✓		14	Tarlac Electric, Inc.	✓	
7	Dagupan Electric Corporation	✓		15	Visayan Electric Company, Inc.	✓	
8	Ilocos Norte Electric Cooperative, Inc.	✓					

Connect with **PEMC**

✉ pemc_info@wesm.ph

☎ +63 2 8631 8734

📍 18F Robinson Equitable Tower,
ADB Avenue Ortigas Center,
Pasig City 1600, Philippines

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