



MONTHLY RETAIL MARKET ASSESSMENT HIGHLIGHTS

26 June to 25 July 2024

Document Information Classification: Public

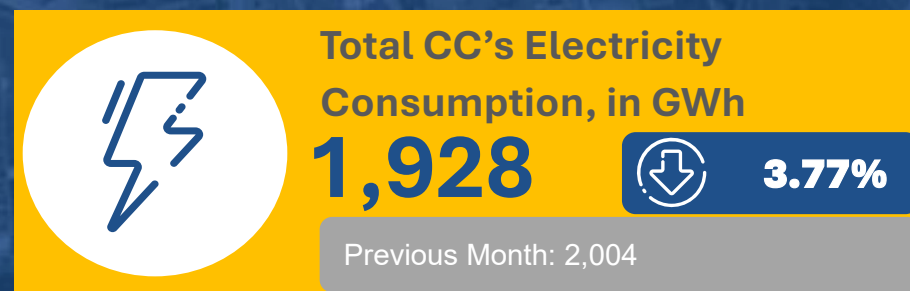
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RCOA

SUMMARY OF OBSERVATION

- Twelve (12) new Contestable Customers (CCs) registered during the July 2024 billing period, nine (9) of which came from Luzon.
- Additional two (2) new CCs from Mindanao registered under the Retail Competition and Open Access (RCOA).
- Eleven (11) out of the twenty (20) switches were due to the expiration of supply contracts
- Reasons for cessation of participation in the RCOA Market were due to the following:
 - Discontinuation of supply of electricity supply in preparation for the planned demolition of the facility
 - Transfer of service to another customer
 - Merging with another customer

AT A GLANCE



2,063

Total Registered



COMMERCIAL

1,099 Customers

Previous Month

1,090 Customers



INDUSTRIAL

964 Customers

Previous Month

961 Customers

LUZON

1,803

Previous Month: 1,794

VISAYAS

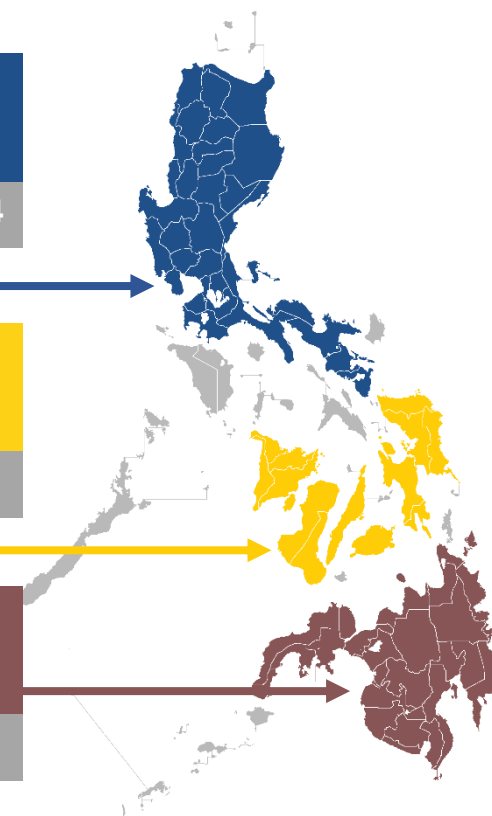
255

Previous Month: 254

MINDANAO

5

Previous Month: 3



500-749kW

347 Customers

Previous Month

339 Customers

750-999kW

438 Customers

Previous Month

438 Customers

**1MW
& ABOVE**

1,278 Customers

Previous Month

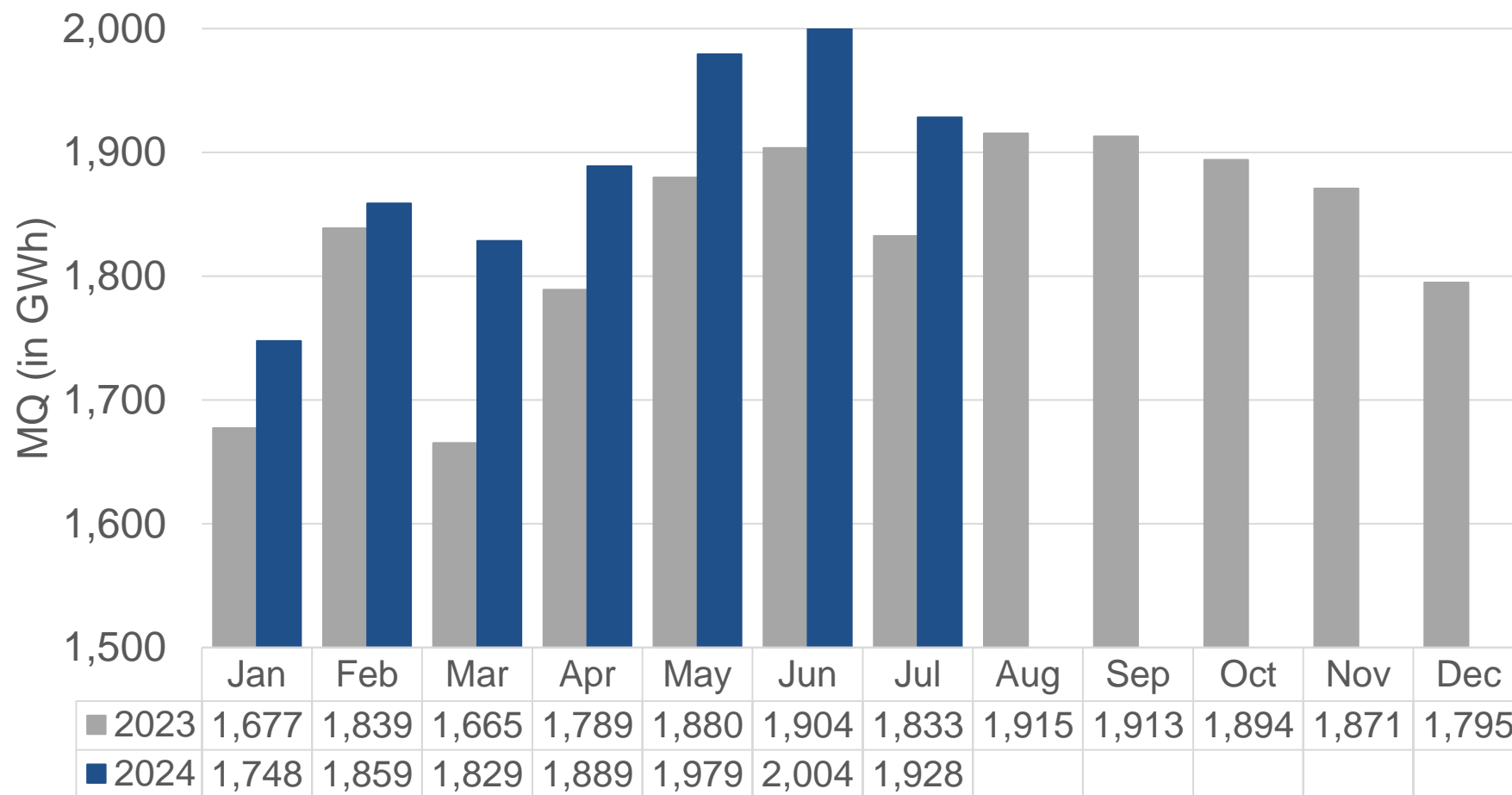
1,274 Customers

RETAIL ELECTRICITY SUPPLIERS

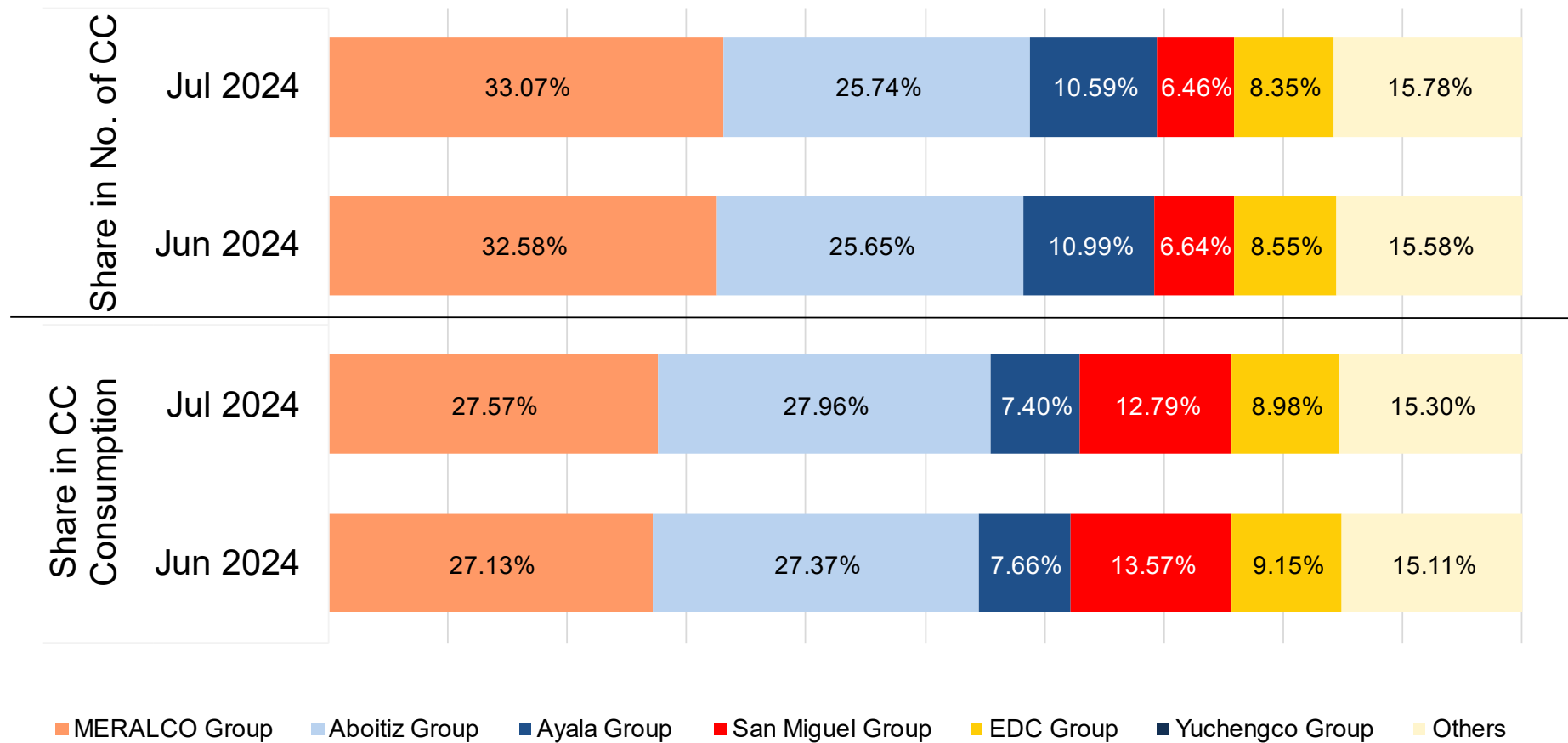
	Registered	Serving CCs
R _{etail} E _{lectricity} S _{upplier}	42	32
Previous Month	41	32
L _{ocal} R _{etail} E _{lectricity} S _{upplier}	15	2
Previous Month	15	2
S _{upplier} O _f L _{ast} R _{esort}	27	0
Previous Month	27	0

Green Energy Supply Solutions, Inc. has registered to be a Retail Electricity Supplier during the billing period.

MONTHLY CONSUMPTION



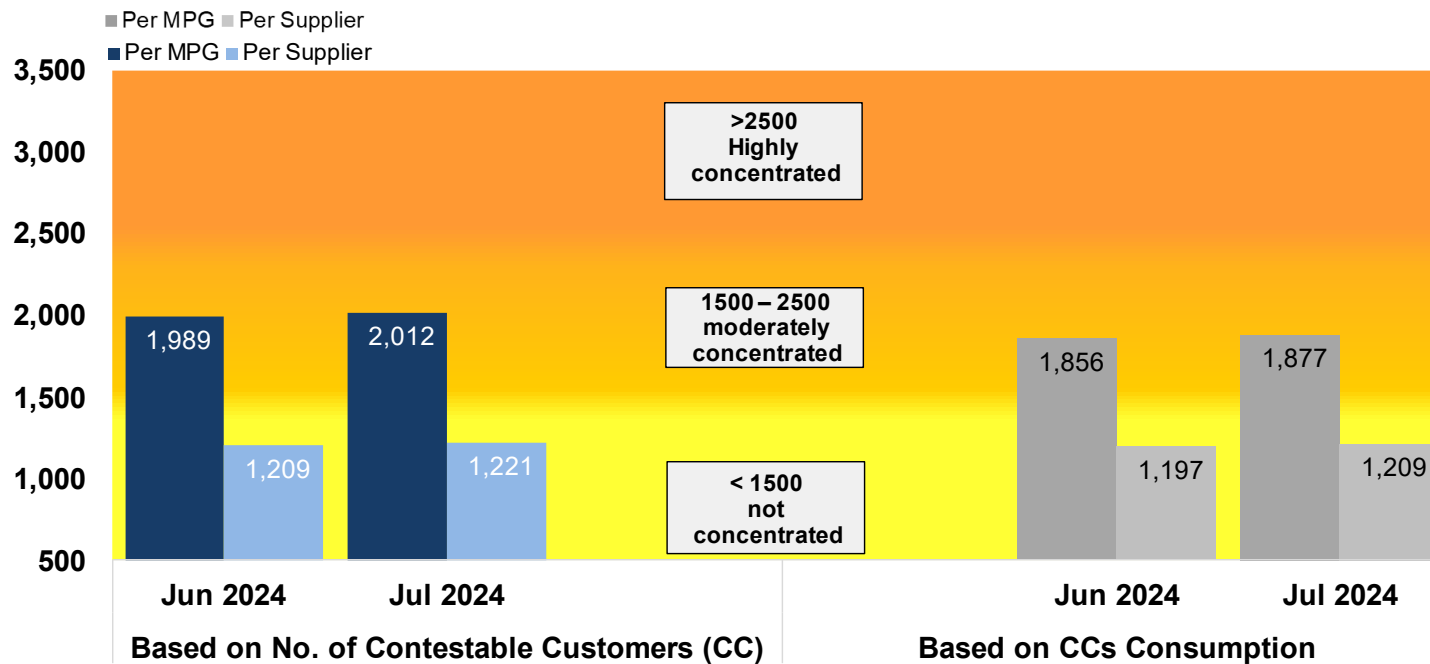
MARKET SHARE



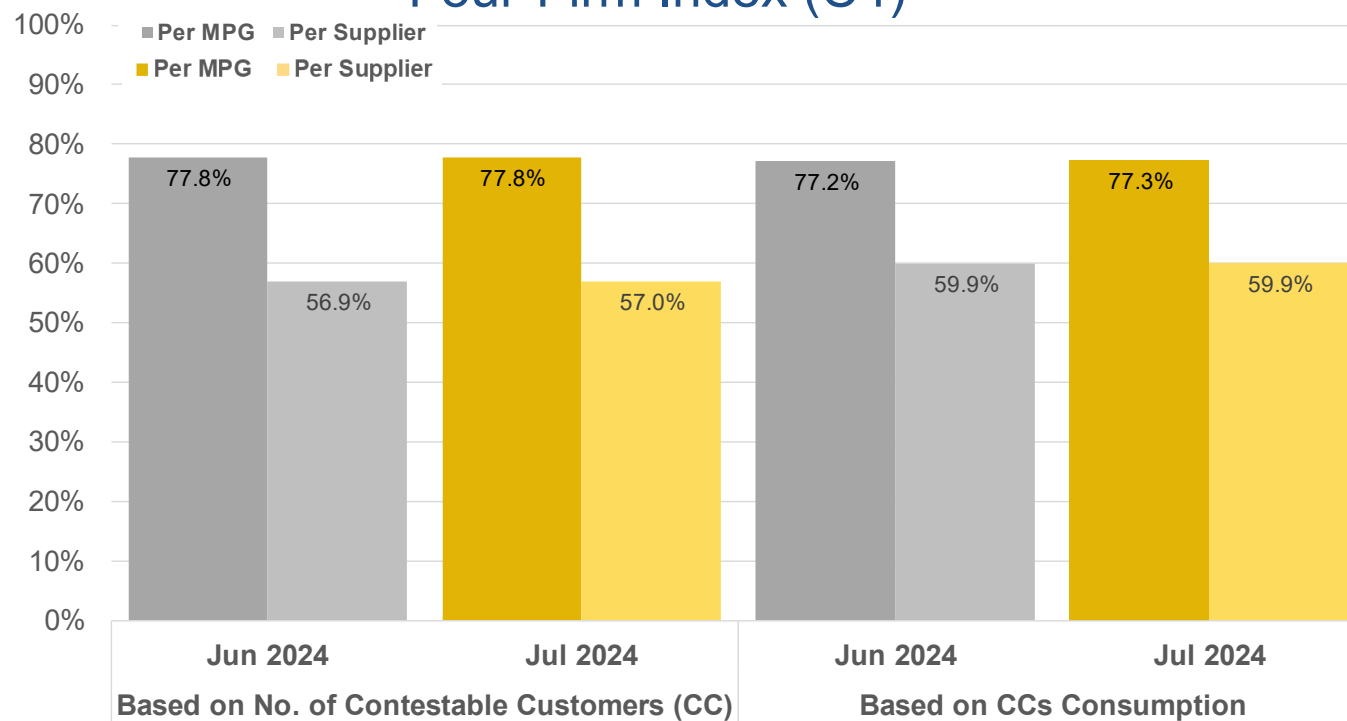
During the billing month of July 2024, minimal increases were observed in the number of CCs of MERALCO, Aboitiz, and other suppliers. This resulted in a corresponding increase in the total consumption attributed to these participants.

MARKET CONCENTRATION

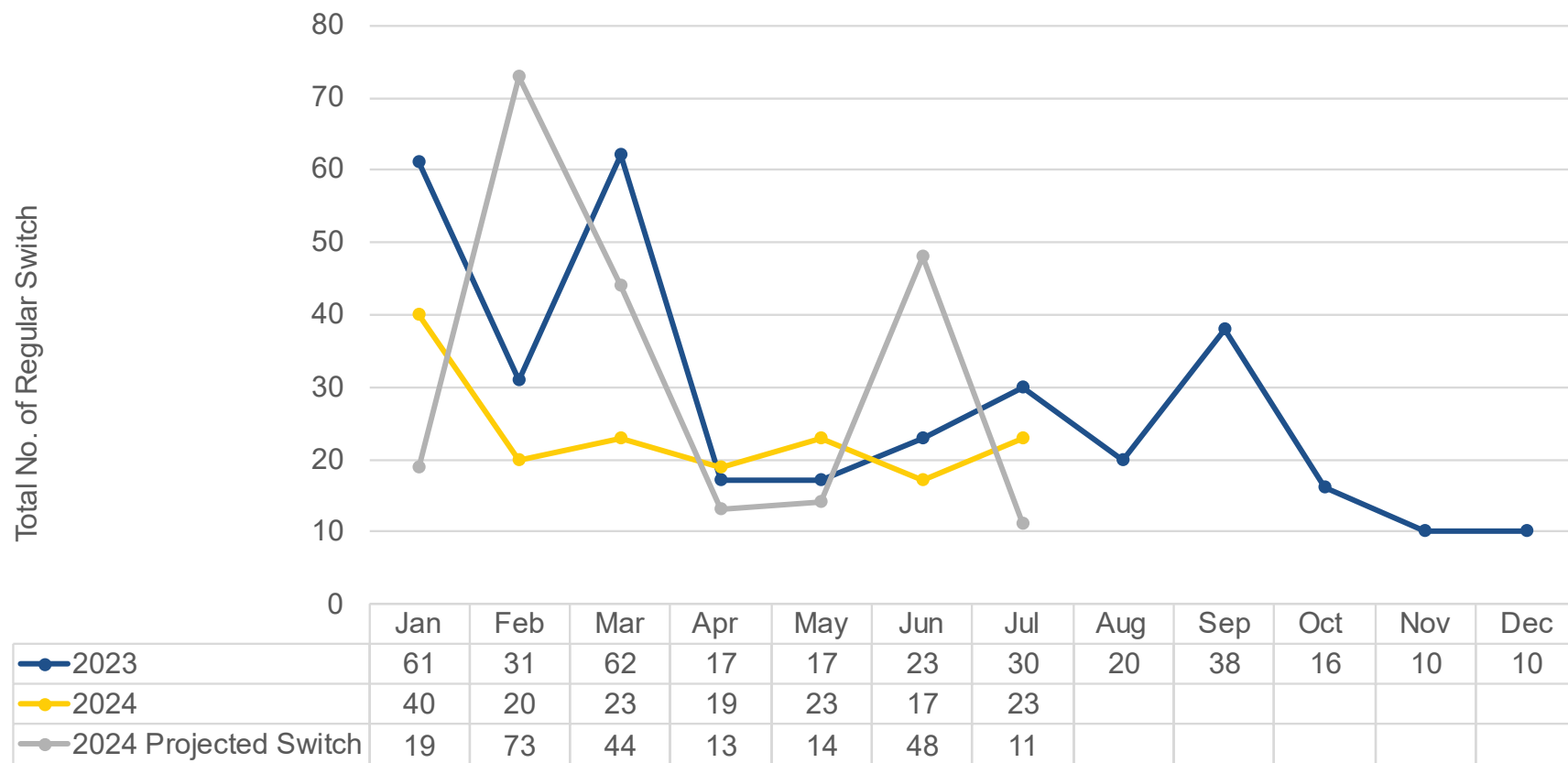
Herfindahl-Hirschman Index (HHI)



Four-Firm Index (C4)



CUSTOMER SWITCHING



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

GEOP

SUMMARY OF OBSERVATION

- Seven (7) new GEOP End-Users (GEUs) were noted to have entered the program during the July 2024 billing period.
- No GEUs switched to another Renewable Energy Supplier (RE Supplier) during the billing month.
- The total consumption of GEUs decreased compared to the previous billing month.

AT A GLANCE



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

366



2.05%

Previous Month: 359



**Total no. of Registered
Suppliers Serving GEUs**

10



0.00%

Previous Month: 10



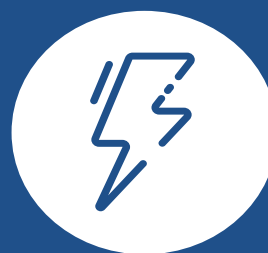
**Total no. of GEUs that
Switched to other RE Supplier**

0



100%

Previous Month: 2



**Total GEU's Electricity
Consumption, in terms of GWh**

48



2.27%

Previous Month: 49

366

Total Registered



COMMERCIAL
262 Customers

Previous Month
256 Customers



INDUSTRIAL
104 Customers

Previous Month
103 Customers

LUZON

280

Previous Month: 273

VISAYAS

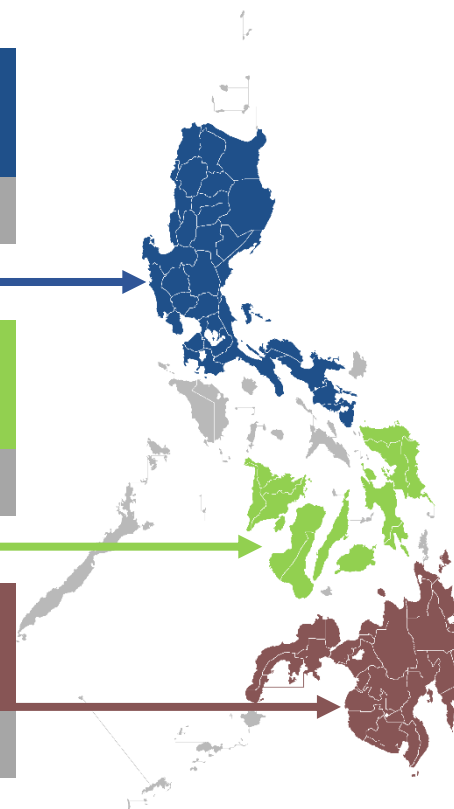
86

Previous Month: 86

MINDANAO

0

Previous Month: 0



100-499kW

349 Customers

Previous Month
342 Customers

500-749kW

9 Customers

Previous Month
9 Customers

750-999kW

7 Customers

Previous Month
7 Customers

1MW

& ABOVE

1 Customer

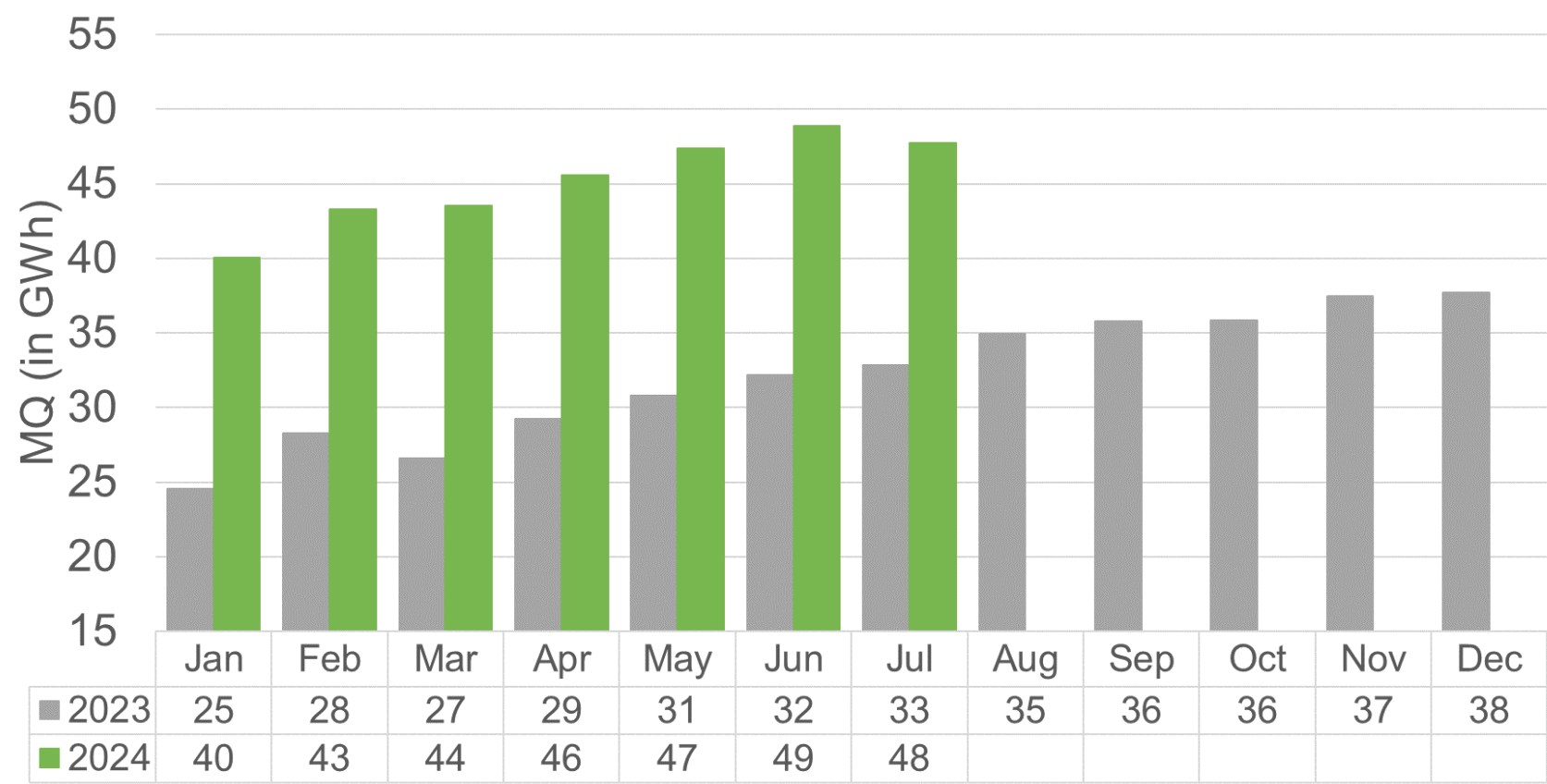
Previous Month
1 Customer

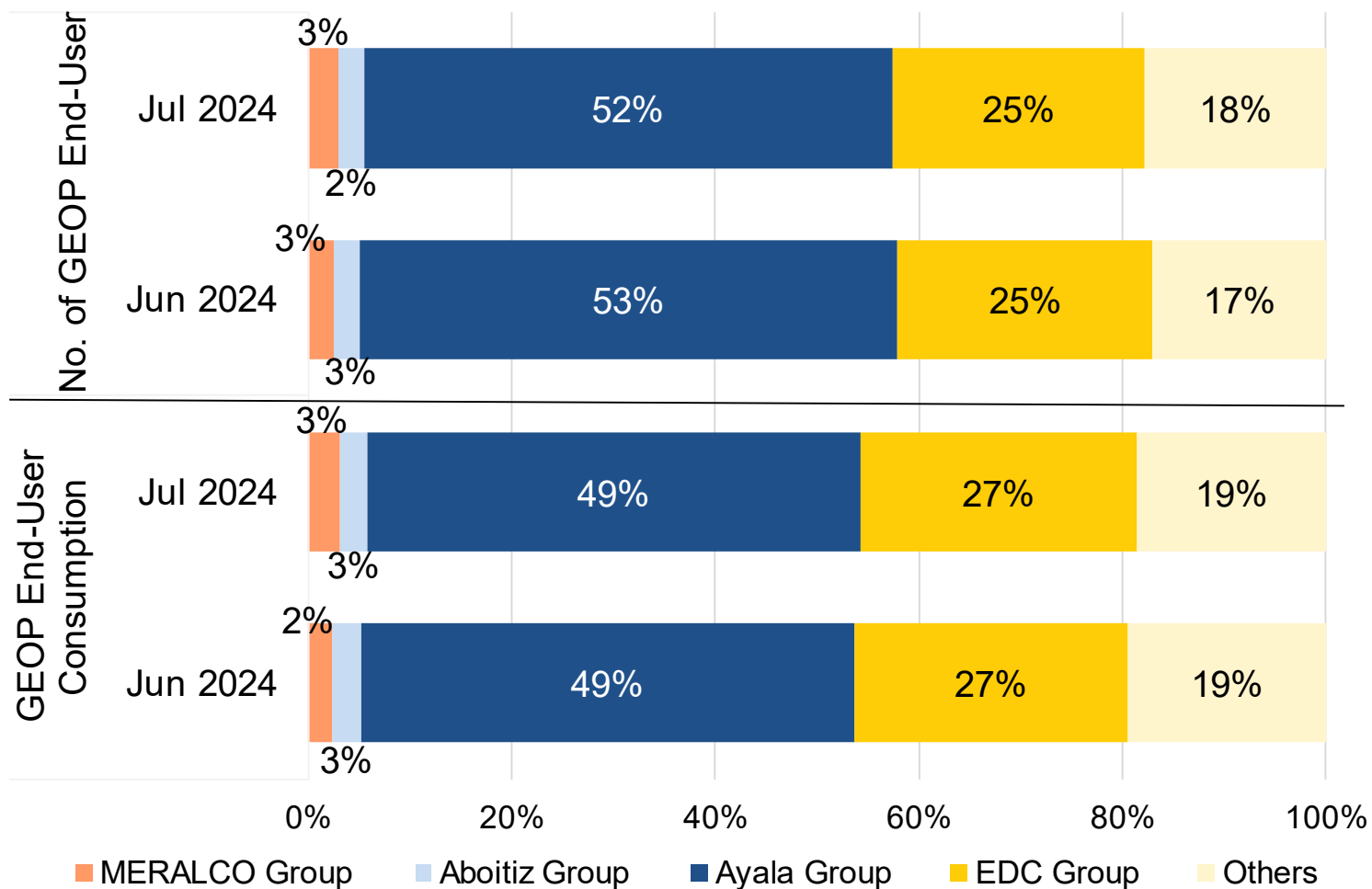
GEOPEND-USERS

	Registered	Serving GEUs
R enewable E nergy S upplier	18	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

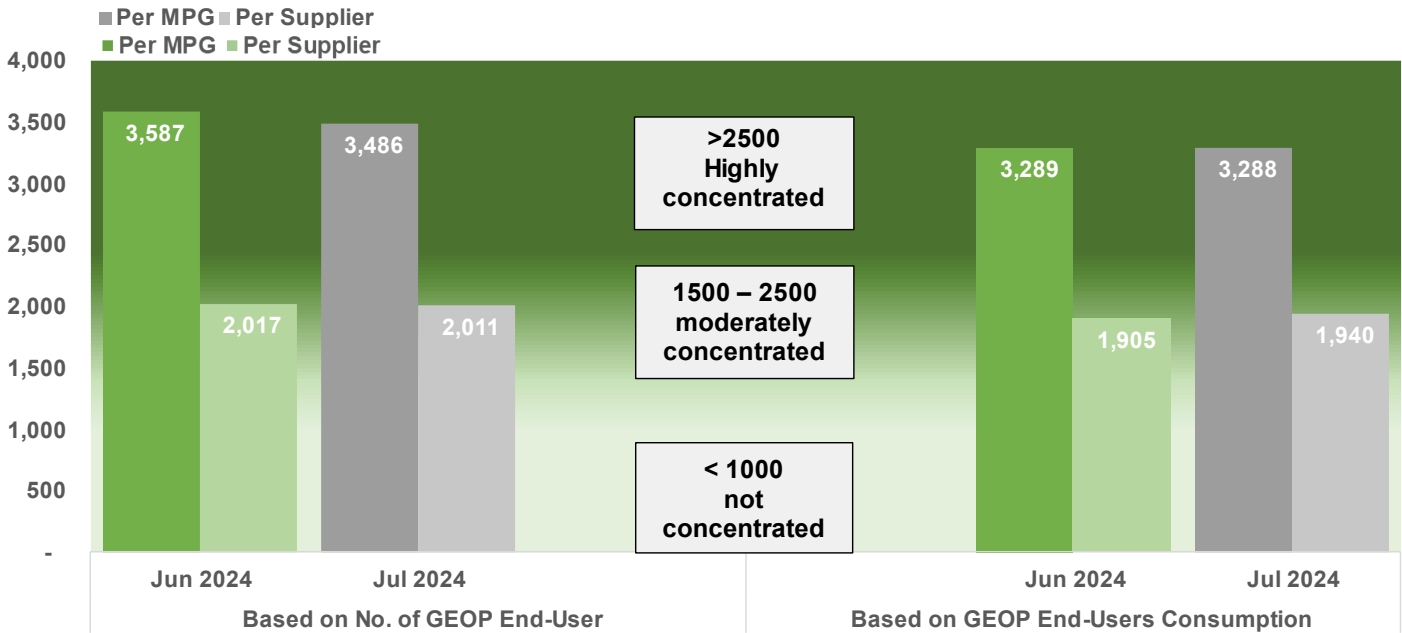




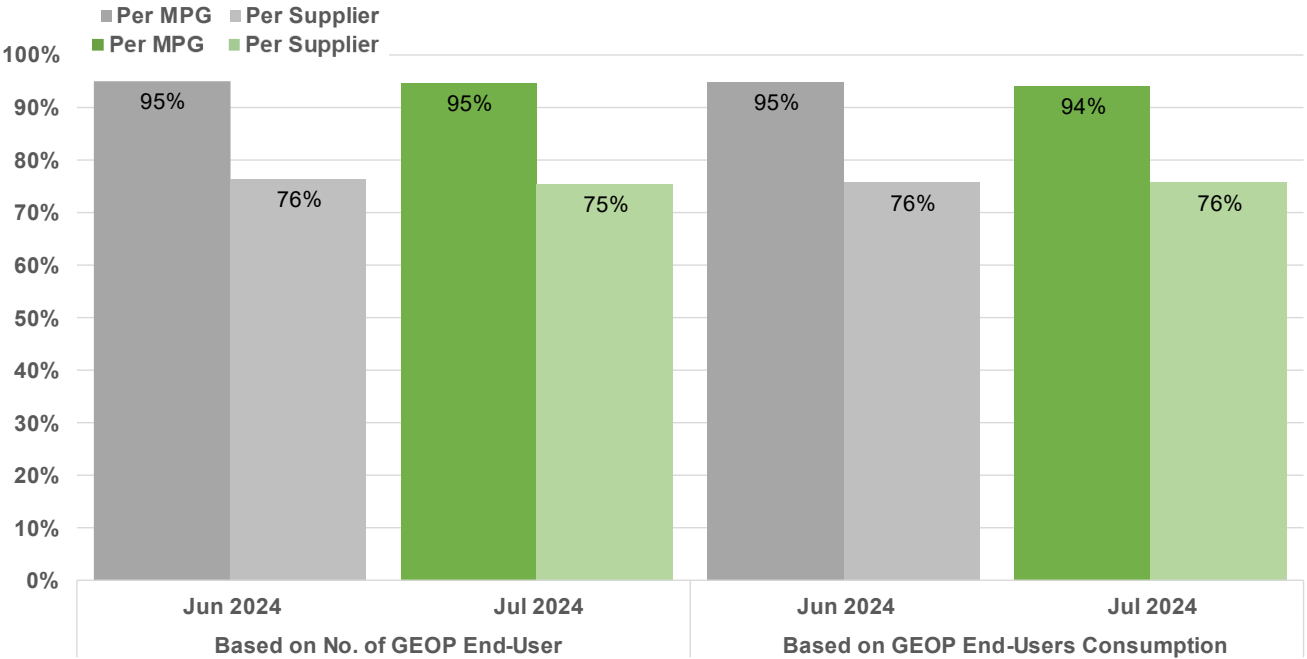
Keeping with the trend from the previous months, Ayala Group remained to be the top market participant group with the highest percentage share for both the number of engaged GEUs and served energy consumption.

Despite only comprising two (2) RE suppliers, the number of GEUs served by suppliers without affiliation increased slightly suggesting that GEUs are already exploring RE Suppliers which do not belong to the major participant groups.

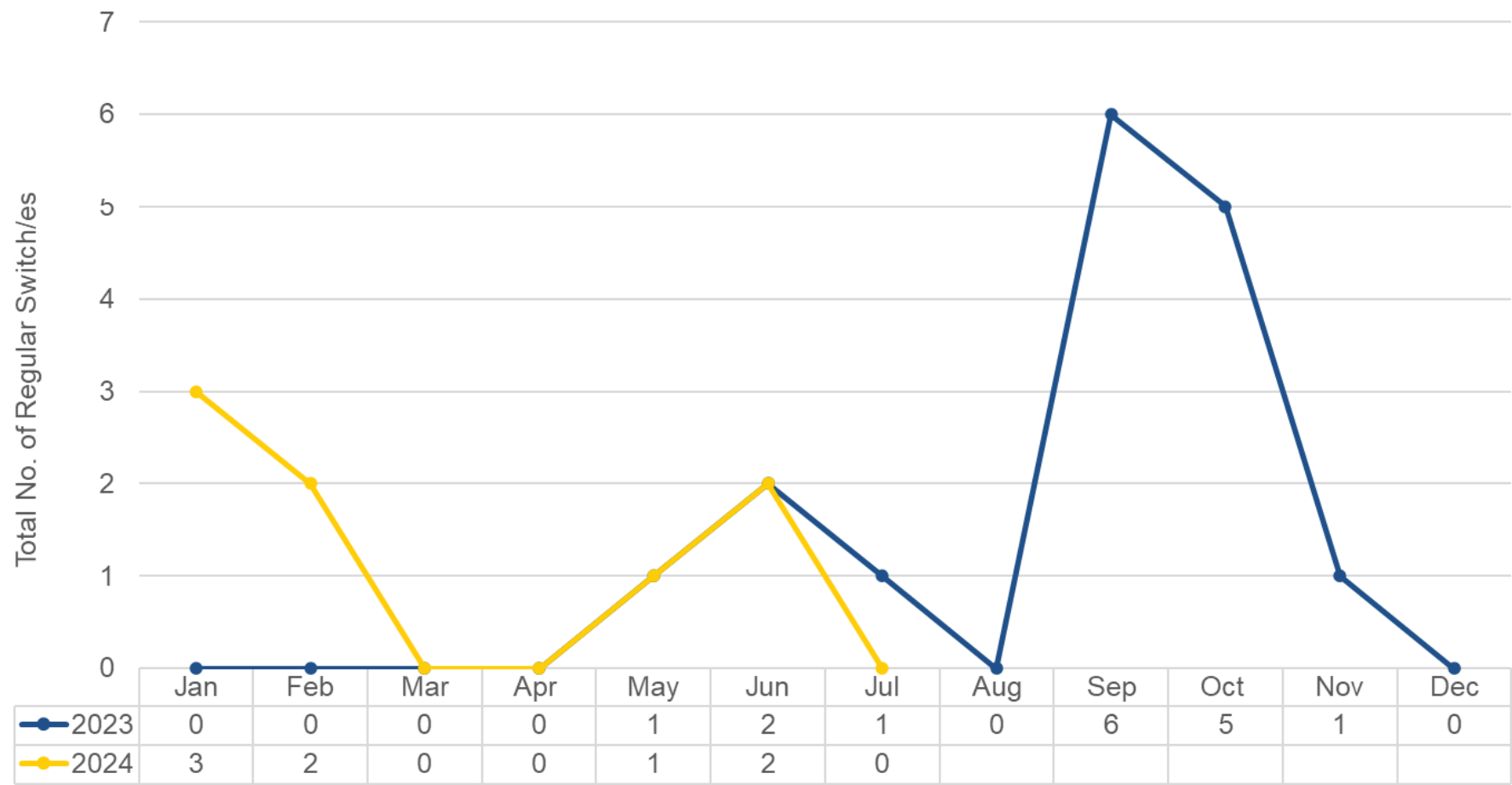
Herfindahl-Hirschman Index (HHI)



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

ANNEX

LIST OF REGISTERED SUPPLIERS

No.	Market Participant Name	RCOA	GEOP	No.	Market Participant Name	RCOA	GEOP
1	Aboitiz Energy Solutions, Inc.	✓	✓	22	Jin Navitas Electric Corporation	✓	
2	AC Energy and Infrastructure Corporation	✓		23	KEPCO SPC Power Corporation	✓	
3	ACEN Corporation (Formerly known as AC Energy Corporation)	✓	✓	24	Kratos RES, Inc.	✓	✓
4	ACX3 Capital Holdings Inc.	✓		25	Mabuhay Energy Corporation	✓	
5	Advent Energy, Inc.	✓	✓	22	Masinloc Power Partners Company Limited	✓	
6	Alsons Power Supply Corporation	✓		26	Mazzaraty Energy Corporation	✓	
7	Anda Power Corporation RES	✓		27	MegawattSolutions Inc.	✓	
8	AP Renewables Inc.	✓	✓	28	MeridianX Inc.	✓	
9	Asiapac Green Renewable Energy Corp.	✓		29	PetroGreen Energy Corporation	✓	
10	Bac-Man Geothermal, Inc.	✓	✓	30	Premier Energy Resources Corporation	✓	
11	Citicore Energy Solutions, Inc.	✓	✓	31	Prism Energy, Inc.	✓	✓
12	Corenergy, Inc.	✓		32	Rockport Power Inc.	✓	
13	DirectPower Services, Inc.	✓	✓	33	SEM-Calaca RES Corporation	✓	
14	Ecozone Power Management, Inc.	✓		34	Shell Energy Philippines, Inc. - RES	✓	✓
15	EEI Energy Solutions Corporation	✓	✓	35	Limay Power Inc. (formerly SMC Consolidated Power Corporation)	✓	
16	FDC Retail Electricity Sales Corporation	✓	✓	36	SN Aboitiz Power- Magat, Inc.	✓	✓
17	First Gen Energy Solutions, Inc.	✓	✓	37	SN Aboitiz Power-RES, Inc.	✓	✓
18	Global Energy Supply Corporation	✓		38	Solar Philippines Retail Electricity, Inc.	✓	✓
19	GNPower Ltd. Co.	✓		40	TeaM (Philippines) Energy Corporation	✓	
20	Green Energy Supply Solutions, Inc.	✓		41	Therma Luzon, Inc.	✓	✓
21	Green Core Geothermal, Inc.	✓	✓	42	Vantage Energy Solutions and Management, Inc.	✓	

LIST OF REGISTERED LOCAL SUPPLIERS

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

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