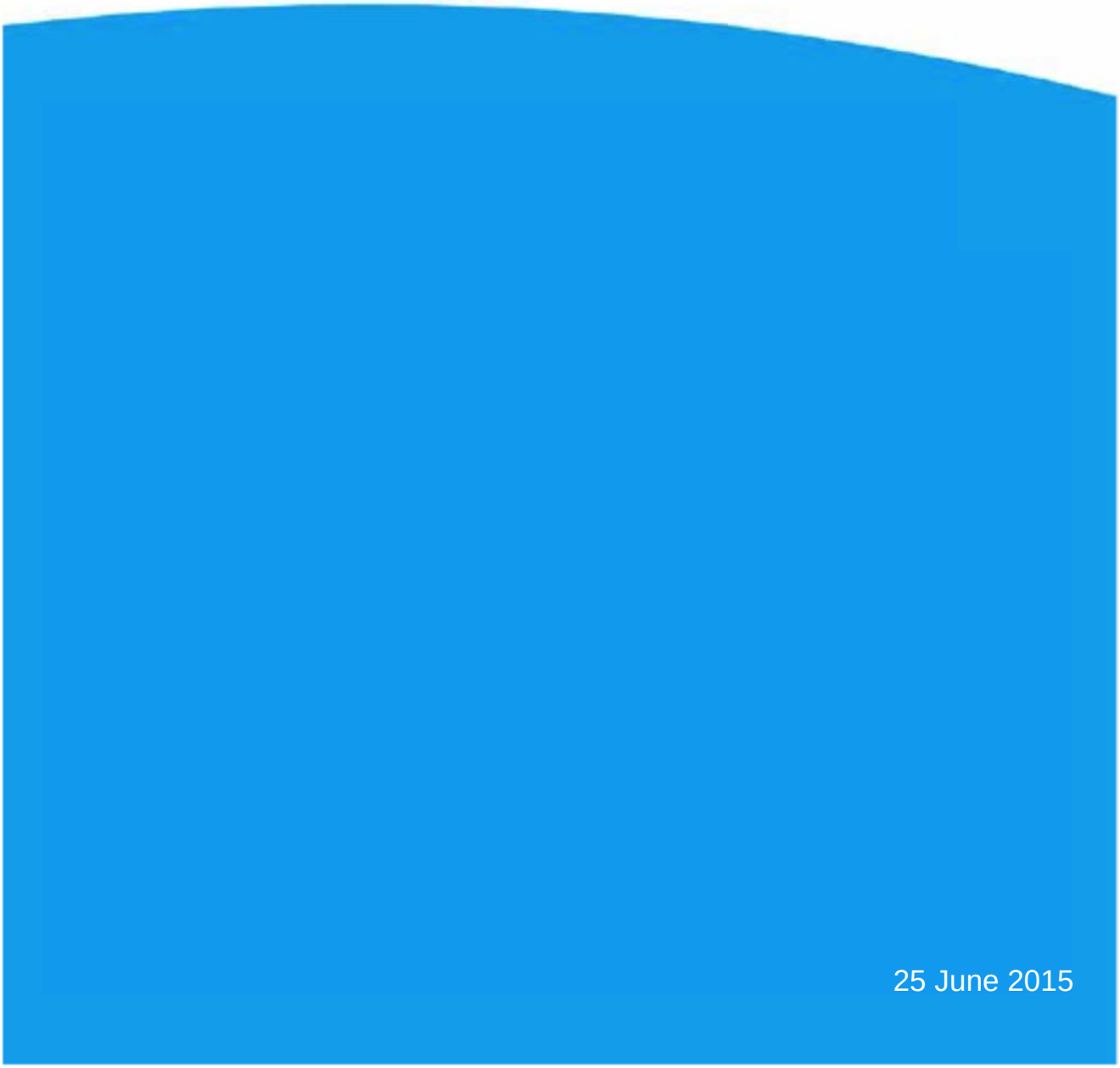
Department of Energy & Climate Change

Quarterly Energy Prices June 2015



25 June 2015

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Any enquiries regarding this publication should be sent to us at energy.stats@decc.gsi.gov.uk

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CONTACT POINTS

This publication, including historical data, is available on the internet at https://www.gov.uk/government/organisations/department-of-energy-climate-change/series/quarterly-energy-prices

Please direct any suggestions about changes to the content or scope of this publication to Jo Marvin (Jo.Marvin@decc.gsi.gov.uk).

Quarterly Energy Prices is prepared by the Energy Prices Analysis team in DECC.

Household Energy Prices
Liz Vincent 0300 068 5162 Elizabeth.Vincent@decc.gsi.gov.uk

Industrial Energy Prices and Petrol Prices
Jo Marvin 0300 068 5049 Jo.Marvin@decc.gsi.gov.uk

International Energy Prices
Helen Lucas 0300 068 5057 Helen.Lucas@decc.gsi.gov.uk

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Other Useful websites

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DEFRA	https://www.gov.uk/government/organisations/department-for-environment-food-rural-affairs
HM Revenue and Customs	https://www.gov.uk/government/organisations/hm-revenue-customs
International Energy Agency	www.iea.org
Eurostat	www.eurostat.ec.europa.eu/
UK Petroleum Industry Association	www.ukpia.com

This is a National Statistics publication

The United Kingdom Statistics Authority has designated these statistics as National Statistics, in accordance with the Statistics and Registration Service Act 2007 and signifying compliance with the UK Statistics Authority: Code of Practice for Official Statistics.

Designation can be broadly interpreted to mean that the statistics:
- meet identified user needs
- are well explained and readily accessible
- are produced according to sound methods, and
- are managed impartially and objectively in the public interest

Once statistics have been designated as National Statistics it is a statutory requirement that the Code of Practice shall continue to be observed.

EXPLANATORY NOTES ARE TO BE FOUND INSIDE THE BACK COVER

Section 1 – Introduction

Quarterly Energy Prices was first published in June 2001. The publication is available on the Internet at https://www.gov.uk/government/collections/quarterly-energy-prices , with the tables available as Excel files at https://www.gov.uk/government/organisations/department-of-energy-climate-change/about/statistics. Monthly updates on domestic energy price indices and the prices of petroleum products are posted at the same address, as are any tables affected by changes in the GDP deflator.

In this issue there are provisional Q1 2015 and final annual 2014 prices for industrial consumers and major power producers. There is also an initial comparison of prices in the IEA with those in the UK for 2014, sourced from IEA data. The petroleum product prices are provisional June 2015, whilst the international unleaded petrol and diesel prices are for May 2015.

This issue also includes analyses of electricity and gas prices in the EU 15 and EU 28 countries compared to those in the UK, by size of consumer. These tables are based upon data published by Eurostat, the EU statistical office, in their 'Statistics in Focus' series. From January 2008, prices are for the 6-month periods from January – June and July – December for each year. The tables cover the 6-month periods from July – December 2011 to July – December 2014.

The next issue, published online on 24 September 2015, will present provisional Q2 2015 energy prices for the manufacturing sector, industrial and domestic fuel price indices, and the price of fuels for major power producers. The petroleum product prices table will have provisional prices for September 2015, and there will be international petrol and diesel prices as at August 2015.

Data in the tables are mainly in cash prices. However, price comparisons (unless otherwise stated) refer to movements in data in real terms. These are prices from which the effects of inflation, as measured by the Gross Domestic Product (GDP) market prices deflator, have been removed. The GDP deflator provides an index of inflation in the whole economy and therefore is applicable consistently to domestic and industrial prices.

For most fuels there is a difference in the prices paid by smaller consumers, typically households, and those paid by larger consumers, usually those in the industrial sector. Indeed, there are differences in prices between large and small industrial users. In a competitive energy market, larger consumers can negotiate lower prices. A household's energy demands may be more variable through the day and year (and therefore higher in peak price times) than those of industrial customers who use energy for continuous processes or can load manage. For these reasons the tables show prices separately for domestic and industrial consumers. Although no prices are given for commercial consumers, prices for the domestic sector should be fairly close to those for smaller commercial consumers and industrial prices should provide a reasonable proxy for larger customers in the commercial sector. The source of all data is the Department of Energy and Climate Change unless otherwise stated.

Future of QEP

As a result of the fall in the number of subscribers, DECC no longer produces a printed edition of the Quarterly Energy Prices publication. The publication will only be available on the DECC section of the gov.uk website at: www.gov.uk/government/collections/quarterly-energy-prices. The decision to cease printed copies of the publications was announced in the special feature article entitled 'Future of Energy Trends and Quarterly Energy Prices: printed publications' in the September 2014 edition of Energy Trends.

If you have any queries or comments on this matter, please contact Jo Marvin, Jo.Marvin@decc.gsi.gov.uk, tel: 0300 068 5049.

The main points in this edition are presented below:

Domestic

- The price paid for domestic fuels in real terms has fallen by 4.3 per cent in the year to Q1 2015. Between Q1 2014 and Q1 2015, real terms prices for domestic electricity fell by 2.5 per cent and domestic gas prices fell by 4.2 per cent.
- Figures show that an average annual 2014 electricity bill across all payment types has risen by £15 (2.6 per cent) since 2013, to £592. Meanwhile, the average 2014 gas bill across all payment types has risen by £23 (3.2 per cent) since 2013, to £752. These bills are based on standard consumptions of 3,800 kWh per year for electricity and 15,000 kWh per year for gas.
- Between Quarter 4 2014 and Quarter 1 2015 electricity transfers decreased by 3 per cent, based on figures provided by Ofgem. Comparing switching levels in Quarter 1 2015 to the same period in 2014, electricity transfers have increased by 16 per cent. Gas transfers are broadly unchanged in Q1 2015 with Q4 2014, but up 29 per cent on a year earlier.

Industrial

- Between Q1 2014 and Q1 2015, average industrial prices in real terms including the Climate Change Levy (CCL) fell by 1.8 per cent for electricity, by 11 per cent for gas, by 21 per cent for coal, and by 32 per cent for heavy fuel oil.
- Between Q1 2014 and Q1 2015, the price of both gas and coal used for electricity generation decreased by 12 per cent in cash terms.

Oil and petroleum product prices

- The price of petrol in June 2015 is 10 per cent (13 pence) lower than a year ago, at 116.4 pence per litre, whilst diesel is also 10 per cent (14 pence) lower at 121.3 pence per litre. Petrol and diesel prices are around 25 pence lower than their peaks in April 2012.
- The price of crude oil purchased by UK refineries in May 2015 was 46 per cent lower than a year ago. The price in June was around $65 per barrel, having previously been above $100 per barrel between February 2011 and September 2014 but falling below $50 per barrel in January 2015.

International

- In May 2015 the UK price for petrol was third highest in the EU 15 at 115.7 pence per litre, whilst the UK price for diesel was the highest in the EU 15 at 121.0 pence per litre.
- For July to December 2014, UK industrial electricity prices for medium consumers including tax were the third highest in the EU 15, whilst industrial gas prices for medium consumers including tax were the third lowest in the EU 15.
- For July to December 2014, UK domestic gas and electricity prices, including tax, were the second and eighth lowest respectively in the EU 15.

Section 2 – Domestic Prices

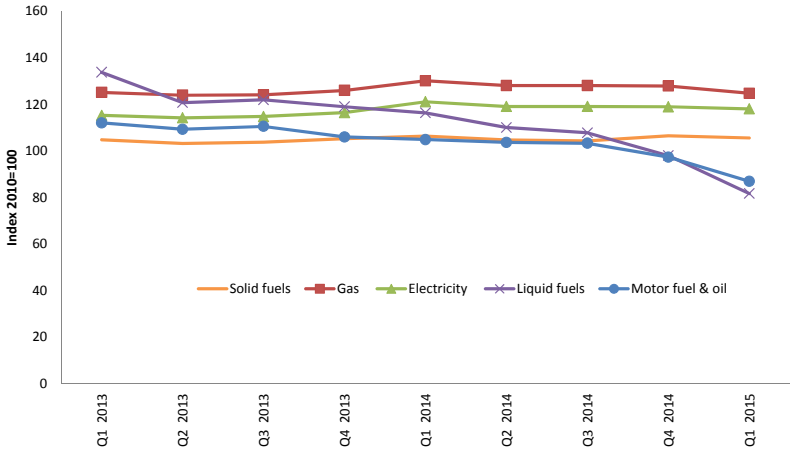
Highlights

- The price paid for domestic fuels in real terms has fallen by 4.3 per cent in the year to Q1 2015. Between Q1 2014 and Q1 2015, real terms prices for domestic electricity fell by 2.5 per cent and domestic gas prices fell by 4.2 per cent.
- The average 2014 electricity bill across all payment types has risen by £15 (2.6 per cent) since 2013, to £592. Meanwhile, the average 2014 gas bill across all payment types has risen by £23 (3.2 per cent) since 2013, to £752. These bills are based on standard consumptions of 3,800 kWh per year for electricity and 15,000 kWh per year for gas.
- The increase in bills is due to increases in prices at the end of 2013; these rises were followed by some price reductions at the start of 2014 and the £12 electricity rebate received by customers in Great Britain in Q4 of 2014.
- Between Quarter 4 2014 and Quarter 1 2015 electricity transfers decreased by 3 per cent, based on figures provided by Ofgem. Comparing switching levels in Quarter 1 2015 to the same period in 2014, electricity transfers have increased by 16 per cent. Gas transfers are broadly unchanged in Q1 2015 with Q4 2014, but up 29 per cent on a year earlier.

2.1 Retail price of fuels for the domestic sector

The price of fuel in terms of domestic fuel price indices has fallen by 4.3 per cent for all domestic fuels in Q1 2015 compared to Q1 2014. In real terms, domestic electricity fell by 2.5 per cent, gas fell by 4.2 per cent, and liquid fuels fell by 30 per cent, driven by falls in the price of crude oil. Between Q1 2014 and Q1 2015, motor fuel and oil prices, including VAT, fell 17 per cent in real terms. The price of solid fuels rose 1.0 per cent in real terms between Q1 2014 and Q1 2015. Chart 2.1 shows the price indices by fuel type.

Chart 2.1 Fuel price indices in the domestic sector in real terms[(1)] 1996 to 2014



Source: ONS, Consumer prices index
(1) Adjusted for inflation using the GDP (market prices) deflator.

Domestic Prices

UK wholesale gas prices have been increasing since the early 2000's, due to upward pressure on prices in Europe and the decline of UK Continental Shelf gas production. Electricity prices have generally been on a rising trend, as gas is an important part of the UK generation mix, but also as a result of higher coal prices, wholesale electricity prices rising from unsustainably low levels, and the introduction of the EU Emissions Trading scheme in 2005.

Liquid fuel (heating oil) prices typically follow crude oil prices. Between 2004 and 2008 prices increased strongly, following crude oil price rises, although they began to decrease after a peak in mid-2008. Liquid fuels prices increased again to reach a new high in real terms in 2012, but in 2013 prices fell slightly in real terms and in 2014 they fell more significantly. Motor fuel prices also follow crude oil prices, with variations according to Budget increases in the duty payable on petrol and diesel and changes to the rate of VAT.

Link to tables:
Table 2.1.1: Consumer prices index: fuel components in the UK
Table 2.1.3: Consumer prices index: fuel components, monthly figures

2.2 Domestic gas and electricity bills

DECC estimates for bills are based on fixed annual consumption levels of 15,000kWh for gas and 3,800kWh for electricity. An article examining bills based on actual annual consumption was published in March 2015's Energy Trends[1]. Using an average fixed consumption enables comparisons over time of the effects of actual price changes to be made, whilst excluding any change in consumption. Actual average domestic consumption of both gas and electricity varies from year to year due to changes in weather and energy efficiency improvements.

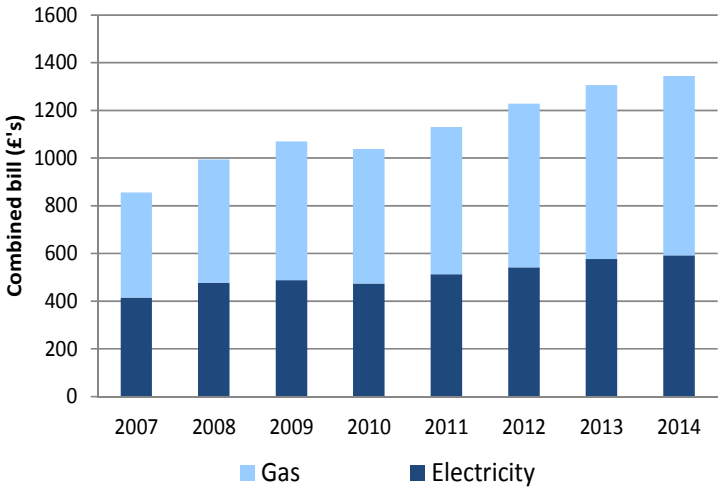
All six of the major domestic energy suppliers increased prices at the end of 2013 or the start of 2014. Four of the six subsequently reduced their prices in the first quarter of 2014 in response to Government changes to the costs of some energy policies. Overall, the changes reflect an average increase in gas and electricity prices of around 5 per cent.

Average electricity and gas bills in 2014 were higher than 2013 bills, mainly due to these price rises implemented in late 2013. These price rises are lower than seen in previous years, which are partially accounted for by a small price fall in Q1 2014, and also a £12 electricity rebate received by customers in Great Britain in Q3 of 2014.

Chart 2.2 shows average standard domestic energy bills, in cash terms, produced from average domestic electricity and gas bills. Combined gas and electricity bills are estimated to have grown by £38 (2.9 per cent) between 2013 and 2014 to £1,344. Average electricity bills in 2014 increased by £15 (to £592) and average gas bills increased by £23 (to £752). Except for a slight decrease in bills in 2010, average domestic bills have consistently risen since 2007.

[1] See March 2015 Energy Trends article for more details: https://www.gov.uk/government/collections/energy-trends-articles

Chart 2.2 Average UK combined gas and electricity bills 2007 to 2014, current prices

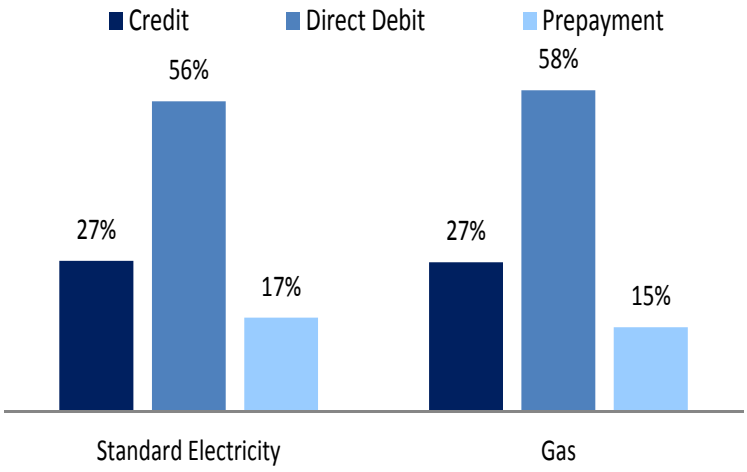


Link to tables:
Table 2.2.1: Average annual domestic electricity bills, by home and non-home supplier
Table 2.3.1: Average annual domestic gas bills, by home and non-home supplier

2.3 Payment methods

At the end of March 2015, the majority of gas customers in GB and standard electricity customers in the UK paid by direct debit. Chart 2.3.1 shows the proportion of customers that use each of the three payment methods for both gas and standard electricity. Over time the percentage of customers on direct debit has increased whereas the percentage of customers on credit has decreased.

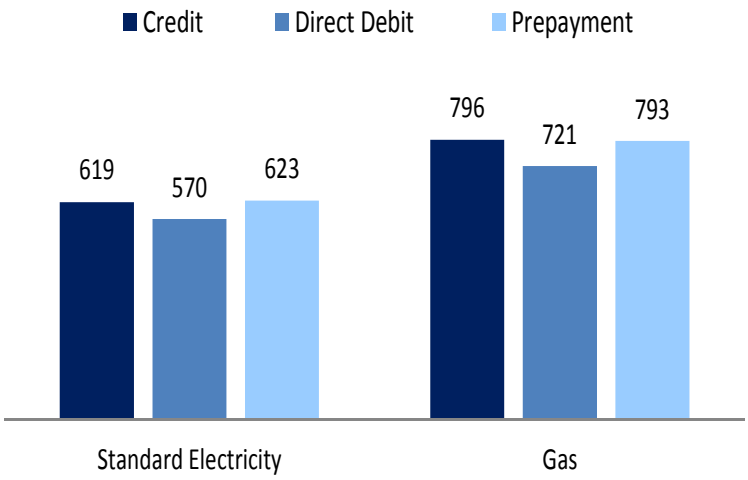
Chart 2.3.1 Proportion of customers on each payment type for Standard electricity and Gas in Q1 2015



In 2014 the average annual bill[1] was cheapest for customers paying by direct debit, with an average bill of £570 for standard electricity customers in the UK and £721 for gas customers in GB, as shown in Chart 2.3.2.

[1] Based on a fixed consumption of 15,000kWh for gas and 3,800kWh for electricity

Chart 2.3.2 Average bill on each payment type for Standard electricity and Gas in 2014

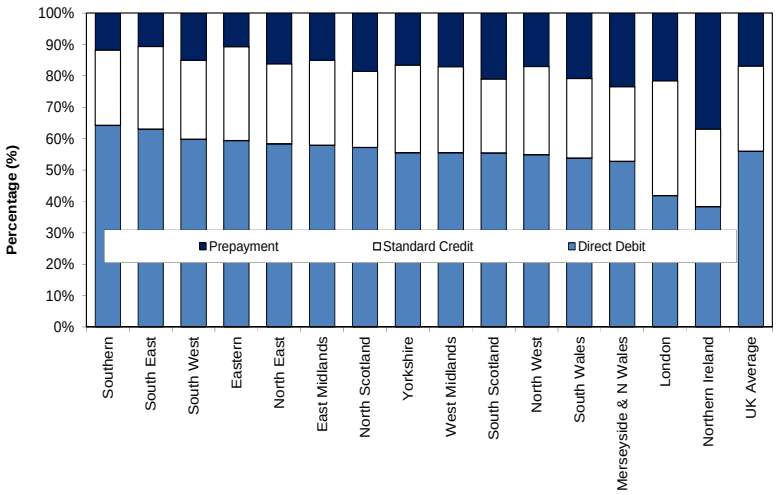


Link to tables:
Table 2.2.1: Average annual domestic electricity bills, by home and non-home supplier
Table 2.3.1: Average annual domestic gas bills, by home and non-home supplier
Table 2.4.2: Regional variation of payment method for standard electricity
Table 2.5.2: Regional variation of payment method for gas

2.3.1 Regional variation of payment methods - Electricity

The proportion of customers paying by the different payment methods varies by region. However, for standard electricity, direct debit is the most popular payment method in all regions. As Chart 2.3.3 shows, the Southern region had the highest proportion of customers paying by direct debit, at 64 per cent. Northern Ireland had the lowest percentage of direct debit customers at 38 per cent and the highest percentage of pre-payment customers in the UK, at 37 per cent. The London region has highest percentage of standard credit customers, with 37 per cent using this payment method and just 42 per cent using direct debit, which is the second lowest rate in the UK.

Chart 2.3.3 Regional variation of payment method for standard electricity, March 2015

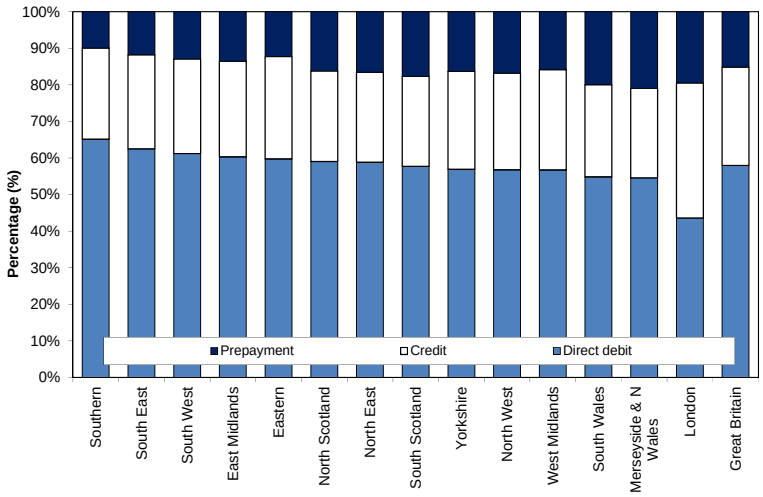


Link to tables:
Table 2.4.2: Regional variation of payment method for standard electricity

2.3.2 Regional variation of payment methods - Gas

Regional variation in payment method for gas is similar to that of standard electricity with direct debit used by the majority of customers in most regions. As can be seen in Chart 2.3.4, the Southern region of England had the highest proportion of gas customers paying by direct debit, at 65 per cent. The London region had the lowest percentage paying by direct debit, at 44 per cent. Merseyside and North Wales had the highest percentage of gas pre-payment customers in GB, at 21 per cent.

Chart 2.3.4 Regional variation of payment method for gas, March 2015



Link to tables:
Table 2.5.2: Regional variation of payment method for gas

2.4 Domestic energy competition

The first trial in competitive gas supply started in April 1996 in South West England, with all customers able to choose their gas supplier by May 1998. Competition in domestic electricity supply began on 14 September 1998 with 750,000 consumers in four areas, and was gradually extended to all consumers in Great Britain by 24 May 1999. In Northern Ireland the market is now beginning to open up to competition, after being monopolistic for many years, although two suppliers still currently supply the vast majority of the market. Gas is still not yet widely available in Northern Ireland, although the number of customers with access to the gas grid is increasing.

A home supplier is where a customer is with the energy supplier that originally supplied that region before the energy market opened up to competition. At the end of March 2015, DECC estimates that 18.2 million (67 per cent of) domestic electricity[1] customers and 14.2 million (63 per cent of) domestic gas customers in Great Britain[2] were no longer with their home supplier (see Chart 2.4.1).

[1] Includes both standard electricity and Economy 7 electricity.
[2] Competition is still limited in scope for domestic customers in Northern Ireland, and so this country has been excluded from this analysis.

Chart 2.4.1 Proportion of customers on Home/Non-home tariffs for electricity and gas

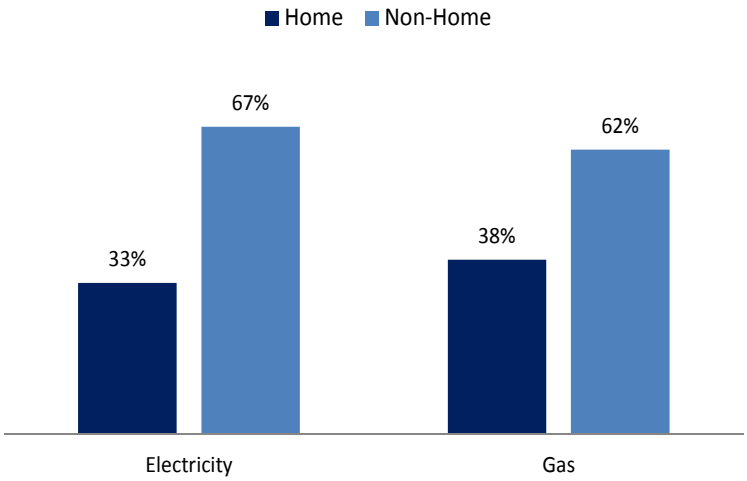
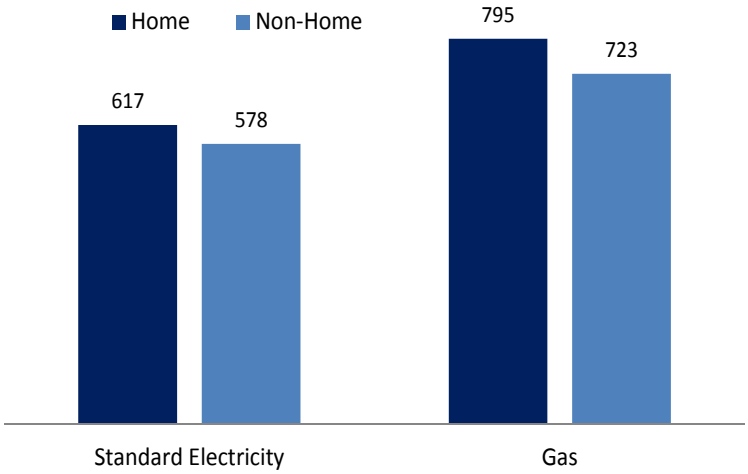


Chart 2.4.2 shows that the average annual bill based on fixed consumption[1] for gas and electricity is lower for customers with non-home suppliers.

Chart 2.4.2 Average Standard electric and Gas bill for home and non-home suppliers



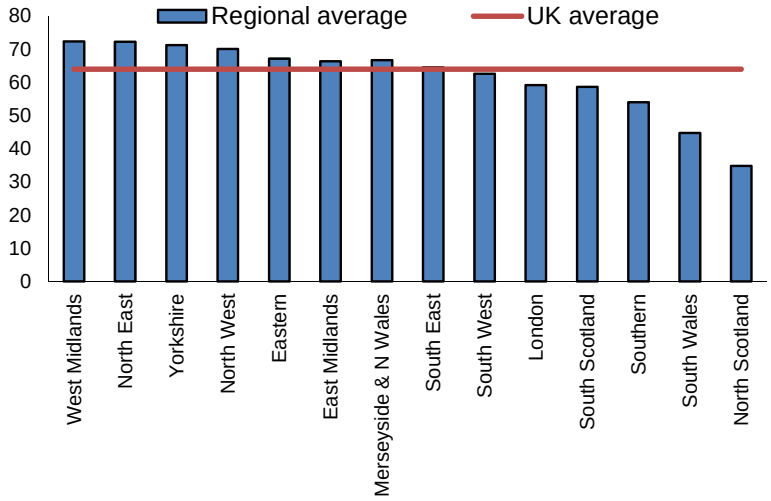
2.4.1 Regional competition – Electricity

Chart 2.4.3 below and Tables 2.4 in the annex are based on DECC price surveys, which currently do not include most of the smaller suppliers. As smaller suppliers are all non-home suppliers the DECC price surveys will under-estimate the proportion of customers not with their home supplier. DECC is considering options to expand data coverage.

Overall, customers in North Scotland were the least likely to have switched, with around 65 per cent still with their home supplier, and customers in the West Midlands and North East are most likely to have switched.

[1] 15,000kWh for gas and 3,800kWh for electricity

Chart 2.4.3 Percentage of GB domestic electricity customers not with home supplier by region, March 2015

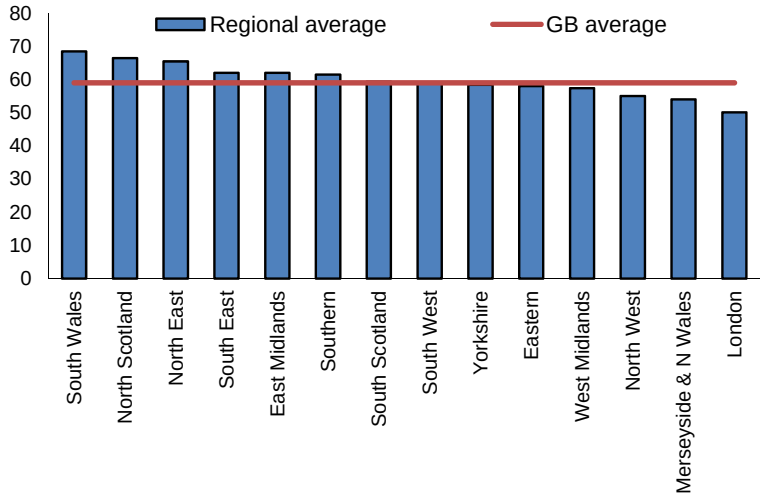


2.4.2 Regional competition - Gas

Chart 2.4.4 below and tables 2.5 are based on DECC price surveys, which currently do not include most of the smaller suppliers. As smaller suppliers are all non-home suppliers the DECC price surveys will under-estimate the proportion of customers not with their home supplier. DECC is considering options to expand data coverage.

Overall, customers in the London region were the least likely to have switched, with 50 per cent still with their home supplier, whereas customers in South Wales were the most likely to have switched.

Chart 2.4.4 Percentage of domestic gas customers not with home supplier by PES region, March 2015



2.4.3 Variation in payment method within energy competition

Direct Debit customers were most likely to have transferred, with 66 per cent of gas customers and 67 per cent of electricity no longer with their home supplier. Standard credit customers were the

least likely to have switched, with 57 per cent of electricity customers and 45 per cent of gas customers having non-home suppliers.

Average annual bills are cheapest for direct debit customers and customers with a non-home supplier rather than customers with their home suppliers. The full breakdown of the average annual bills for gas and standard electricity for each payment method split by home and non-home supplier for 2014 is shown in the table below. For previous years' data see tables 2.2.1 and 2.3.1 in the annex.

Average annual bills for standard electricity and gas by payment method and supplier type for 2014.

Pounds

	Standard Credit		Direct Debit		Prepayment	
Energy	Home Supplier	Non-Home Supplier	Home Supplier	Non-Home Supplier	Home Supplier	Non-Home Supplier
Standard Electricity	641	602	590	560	646	608
Gas	821	765	765	700	823	769

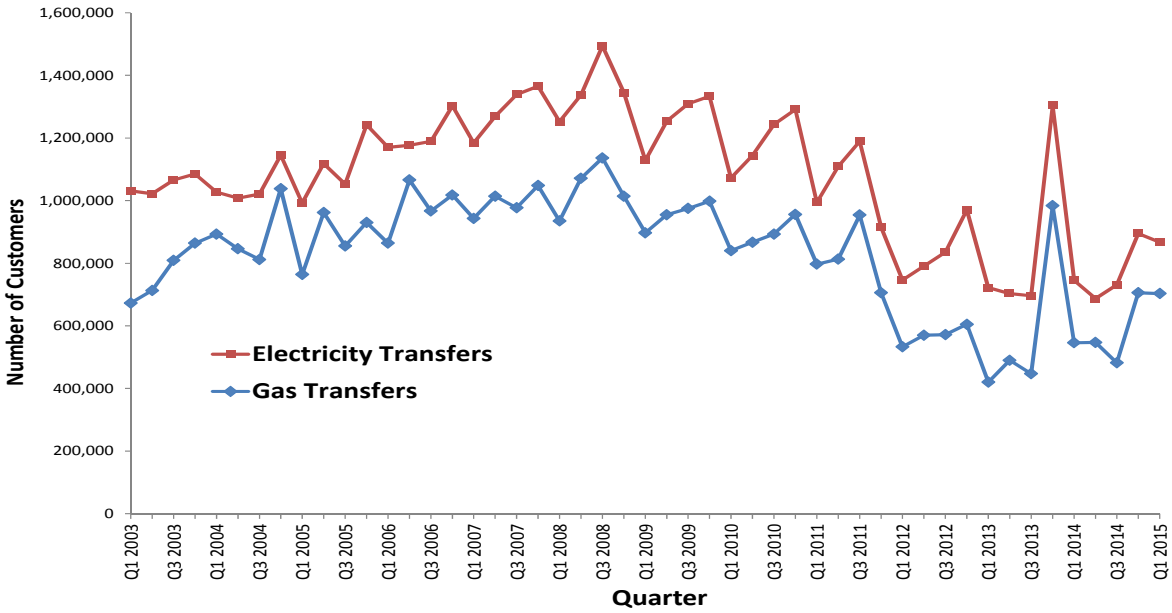
Link to tables:
Table 2.2.1: Average annual domestic electricity bills, by home and non-home supplier
Table 2.3.1: Average annual domestic gas bills, by home and non-home supplier
Table 2.4.1: Percentage of domestic electricity customers by region by supplier type
Table 2.5.1: Percentage of domestic gas customers by region by supplier type

2.5 Transfer statistics

The number of transfers in the domestic electricity market, based on data provided by Ofgem, increased by 16 per cent between 2014 quarter 1 and 2015 quarter 1. An estimated 867,000 transfers were made in 2015 quarter 1 compared with 745,000 transfers in the same period last year, as seen in Chart 2.5. Since quarter 4 2014, electricity transfers have decreased by 3 per cent. An alternative data set for electricity transfers is published by Energy UK. This shows a broadly similar pattern, and indicates that there has been a growth in switching to the new entrants in the domestic electricity supply market; however, Energy UK statistics also cover industrial switches.

For electricity, Ofgem provide switching levels which cover all suppliers in the domestic electricity market. From January 2014, Ofgem provided gas switching levels on the same basis for the first time. Previous to this, gas switching levels only covered the main six suppliers. For this reason published gas transfers will be artificially high in quarter 1 of 2014 compared to earlier quarters. Since quarter 1 of 2014 gas transfers have increase by 29 per cent.

Chart 2.5 Transfer statistics in the domestic gas and electricity market



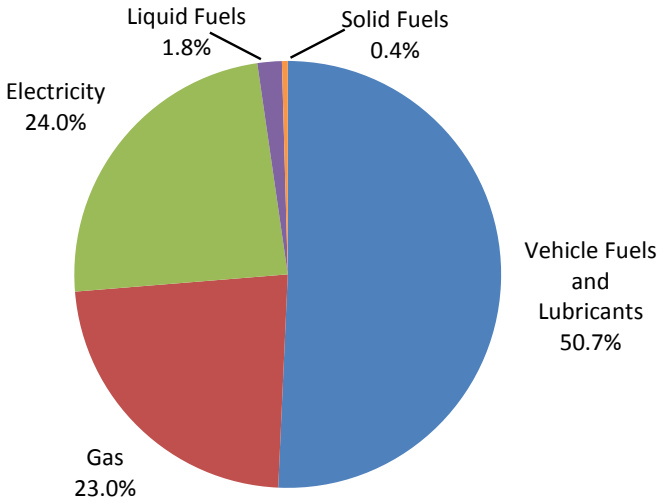
Link to tables:
Table 2.7.1: Transfer statistics in the domestic gas and electricity markets

2.6 Expenditure on energy in the domestic sector

Energy expenditure as a percentage of total consumer expenditure had been decreasing steadily from the 1982 peak of 9.3 per cent to reach a series low of 4.9 per cent in 2003, before beginning to increase again. From 2008 to 2013 it remained fairly steady. Between 2013 and 2014, total expenditure on energy products decreased by 7 per cent in current prices. It now accounts for 5.8 per cent of the total consumer expenditure, down from 6.5 per cent in 2013.

Chart 2.6.1 shows the expenditure of energy broken down by fuel types for 2014. Vehicle Fuels and Lubricants contribute to around half of consumers' expenditure on energy. Just under a quarter of total expenditure is spent on each of electricity and gas.

Chart 2.6.1 Breakdown of consumers' expenditure on energy 2014



Domestic Prices

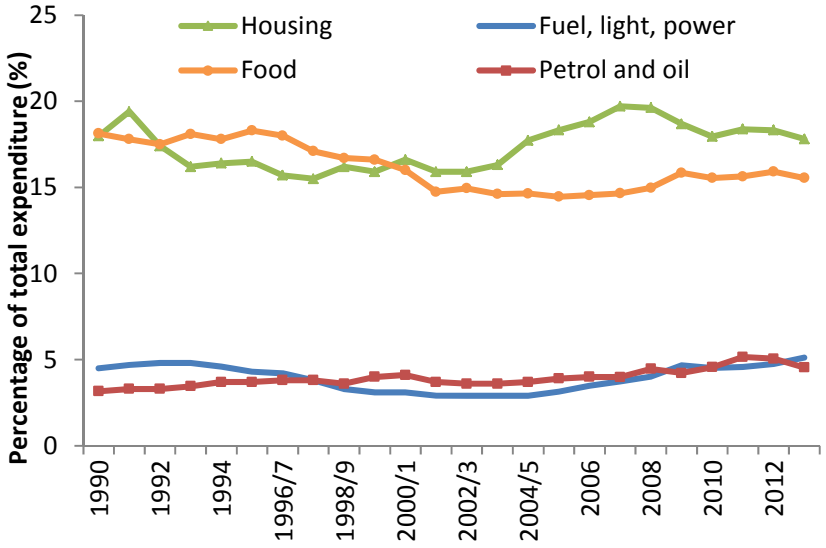
Data from the Living Costs and Food Survey enables comparisons of expenditure on energy (and other types of household expenditure) to be made across income decile groups, as shown for 2013 in the table below. The greatest percentage spend on fuel occurs in those households with lower levels of income. These groups spend around 10 per cent of their total expenditure on fuel and power, compared with 3 per cent in the highest income decile group.

	1st decile (lowest)	2nd decile	3rd decile	4th decile	5th decile	6th decile	7th decile	8th decile	9th decile	10th decile (Highest)	Average
Fuel and power	11%	10%	7%	6%	6%	5%	5%	4%	4%	3%	5.1%
Housing	21%	21%	21%	20%	19%	19%	18%	17%	16%	15%	17.8%
Food	18%	19%	18%	17%	16%	17%	16%	16%	15%	13%	15.5%
Petrol and oil	3%	3%	4%	4%	5%	5%	5%	5%	5%	4%	4.5%

Other sectors to do not have such a range in the proportion of total expenditure spent within that sector between the income deciles.

The average weekly expenditure on domestic fuel per consuming household in 2013 was £26.80, representing a 9 per cent increase from 2012[1]. Average household expenditure on all domestic fuels (excluding motor fuel) doubled between 2000 and 2013. Chart 2.6.2 shows the average proportion of total expenditure was spent on each of these sectors from 1990 to 2013.

Chart 2.6.2 Average household expenditure patterns 1990 to 2013



Link to tables:
Table 2.6.1 Total household expenditure on energy in the UK
Table 2.6.2 Average expenditure each week on fuel per consuming household in the UK

[1] The year-on-year changes presented here should be treated with caution because changes in recording expenditure were implemented by the Living Costs and Food (LCF) survey in 2013.

Section 3 – Industrial Prices

Highlights

- Between Q1 2014 and Q1 2015, average industrial prices in real terms including the Climate Change Levy (CCL) fell by 1.8 per cent for electricity, by 11 per cent for gas, by 21 per cent for coal, and by 32 per cent for heavy fuel oil.
- Between Q1 2014 and Q1 2015, the price of both gas and coal used for electricity generation decreased by 12 per cent in cash terms.

Notes

Prices presented in this section will vary depending on sectoral coverage (manufacturing industry, all industry, or non-domestic consumers) and consumption levels. The price of a fuel may move to a different degree, or even in a different direction, depending on the sectors and/or consumption sizebands being compared. Changes in price may also vary depending on the time period used, i.e. changes in annual average prices may be different to changes in price between quarters a year apart.

These factors help to explain differences between prices. As an example, average prices in Tables 3.1.1 – 3.1.4, which covers manufacturing industry, tend to be weighted more towards the price paid by large consumers, whereas for Tables 3.4.1 & 3.4.2, covering all non-domestic consumers, average prices tend to be weighted more towards smaller consumers. Larger consumers may be more dependent on wholesale spot prices, and therefore more vulnerable to price spikes, whereas smaller consumers tend to be on more stable contracts.

Price indices in Table 3.3.1 aim to be reflective of all industrial users and are quoted in the key points on page 4.

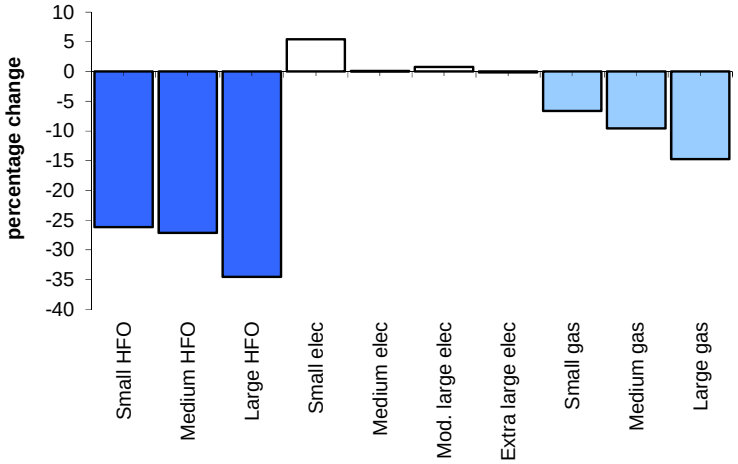
3.1 Energy prices in the manufacturing sector

Prices of fuels for the manufacturing sector, excluding CCL, for various sizebands of consumer are presented in Tables 3.1.1 to 3.1.4. Prices tend to vary by consumption, reflecting the bargaining position of the larger users and factors such as length of contracts and the relative (to size) impact of crude prices on fuel prices.

Prices of most fuels broadly follow the price of crude oil, which, aside from a significant fall in 2009, was on an upward trend between 2004 and 2013. Annual 2013 crude prices were slightly lower than 2012, and annual 2014 crude prices were around 10% lower than 2013. Average fuel prices for coal increased each year between 2004 and 2014 with the exception of 2009 and 2012. For heavy fuel oil and gas oil, prices increased each year between 2004 and 2012, with the exception of 2009, but fell in 2013 and 2014. For gas, average prices fell in 2007, 2009, 2010 and 2014 but otherwise increased each year. For electricity, average prices rose each year with the exception of falls in 2007 and 2010.

Recent price movements are shown in Chart 3.1. Compared to Q1 2014, heavy fuel oil consumers in Q1 2015 have seen prices fall by an average of 31 per cent in cash terms. Electricity consumers generally saw prices, excluding CCL, rise by an average of 0.8 per cent, although the largest industrial firms saw prices fall by 0.2 per cent. Gas consumers saw average prices, excluding CCL, decrease between Q1 2014 and Q1 2015 by 14 per cent.

Chart 3.1 Percentage price movements between Q1 2014 and Q1 2015 for heavy fuel oil (HFO), electricity and gas, by size of consumer, for manufacturing industry



On an annual basis, over the past five years (2009 to 2014), average industrial electricity prices have risen by 7.5 per cent (a fall of 3.1 per cent in real terms), with an increase of 0.8 per cent (a fall of 0.8 per cent in real terms) in the last year. Over the same five year period average industrial gas prices have increased by 18 per cent (6.1 per cent in real terms), and decreased by 12 per cent (13 per cent in real terms) in the last year.

Link to tables:
Table 3.1.1: Quarterly prices of fuels purchased by manufacturing industry (original units)
Table 3.1.2: Quarterly prices of fuels purchased by manufacturing industry (p/kWh)
Table 3.1.3: Annual prices of fuels purchased by manufacturing industry (original units)
Table 3.1.4: Annual prices of fuels purchased by manufacturing industry (p/kWh)

3.2 Average prices of fuels purchased by the major UK power producers and of gas at UK delivery points

Average purchase costs of fuels used to generate electricity are presented in Table 3.2.1. Generation costs are also affected by non-fuel costs, and by the efficiency with which fuel is converted into electricity in different types of power station, therefore comparing the fuel input costs in common units does not necessarily provide a picture of full costs.

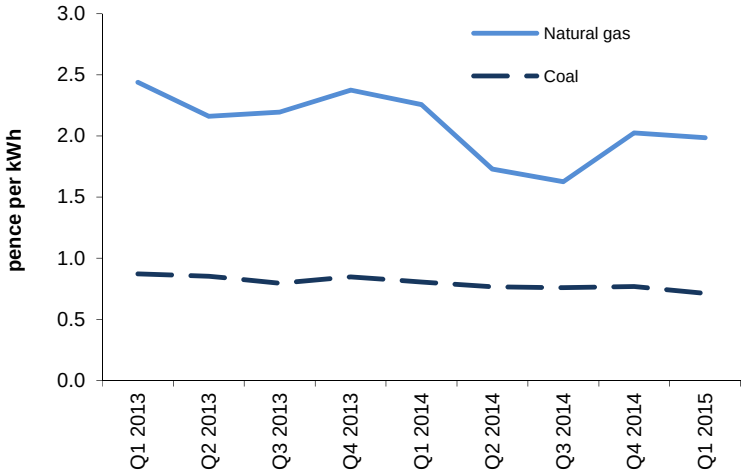
Gas wholesale prices have generally been higher and more volatile since 2008, in line with crude oil prices. Prices reached a 5-year high of 108 pence per therm in March 2013, due to a number of unplanned outages at oil and gas facilities in the North Sea and unseasonably cold weather. More recently, in the first quarter of 2015, gas prices have ranged between 45 – 55 pence per therm.

Prior to 2008, coal was the dominant fuel used in electricity generation. Between 2008 and 2010, gas overtook coal as the dominant fuel, but since 2011 the relative prices of coal and gas have meant that coal use has increased once more at the expense of gas. In 2013, gas generation fell to the lowest level since 1996 due to high gas prices, but in 2014 gas generation increased by 6 per cent due to lower wholesale gas prices between June and August and in response to lower nuclear and coal output.

Oil purchased for generation, like all generation fuels, is more likely to be purchased on longer-term contracts. This, coupled with the mix of oils purchased, means that oil for generation is less closely related to spot prices than other industrial users' contracts. Between 2000 and 2014, the price of oil for generation has more than tripled in cash terms. Oil accounts for less than 1 per cent of UK generation.

Between Q1 2014 and Q1 2015 the price in cash terms of both gas and coal for power stations fell by 12 per cent, as shown in Chart 3.2. In Q1 2015, the price of coal in p/kWh was less than half the price of gas. The price gap between coal and gas in p/kWh in cash terms in Q1 2015 was 1.1 pence. Compared to Q4 2014, the price of coal in cash terms has fallen by 7.7 per cent whilst the price of gas has decreased by 2.0 per cent.

Chart 3.2 Average price paid by UK power producers for coal and natural gas Q1 2013 to Q1 2015



Over the past 5 years, the annual average real terms price of natural gas used by major power producers in 2014 has increased by 21 per cent, whilst the price of coal has decreased by 6.0 per cent. In comparison, in the last year the annual average price of gas decreased by 19 per cent, whilst the price of coal fell by 9.3 per cent.

Link to table:
Table 3.2.1: Average price of fuels purchased by the major UK power producers and of gas at UK delivery points

3.3 Fuel price indices for the industrial sector

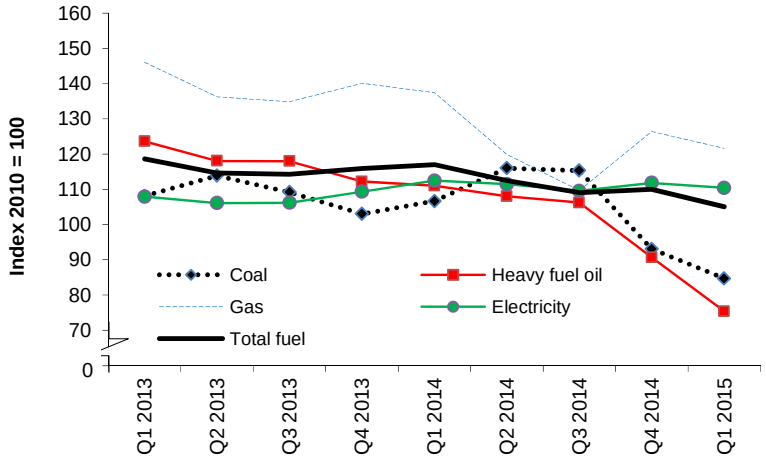
Fuel price indices, both excluding and including the Climate Change Levy (CCL) in real and cash terms, are presented in Tables 3.3.1 and 3.3.2. Prices in real terms (including CCL) for all fuels generally stayed below 1990 levels until 2005/06, with some of the largest annual increases occurring between 2007 and 2008.

Average industrial gas prices including the Climate Change Levy (CCL) fell by 11 per cent in real terms between Q1 2014 and Q1 2015, whilst industrial electricity prices including CCL fell in real terms by 1.8 per cent, as shown in Chart 3.3. Over the same period the price of coal decreased by 21 per cent in real terms and the price of heavy fuel oil decreased by 32 per cent. The inclusion of

Industrial prices

CCL increases the average price of coal by 7.3 per cent and the average price of electricity and gas by 2.3 and 4.1 per cent respectively in Q1 2015.

Chart 3.3 Industrial fuel price indices in real terms[(1)] including the Climate Change Levy from Q1 2013 to Q1 2015



(1) Deflated using the GDP implied deflator at market prices

On an annual basis, the average price of heavy fuel oil in 2014 compared to 2004 has increased by 170 per cent in real terms, with a decrease of 12 per cent in 2014. In comparison, the annual average price of gas, including CCL, has increased by 90 per cent in real terms since 2004, with a fall of 11 per cent in the latest year. The average price of electricity, including CCL, has risen by 104 per cent in real terms since 2004, and by 3.6 per cent in the latest year.

Link to table:
Table 3.3.1 & 3.3.2: Fuel price indices for the industrial sector

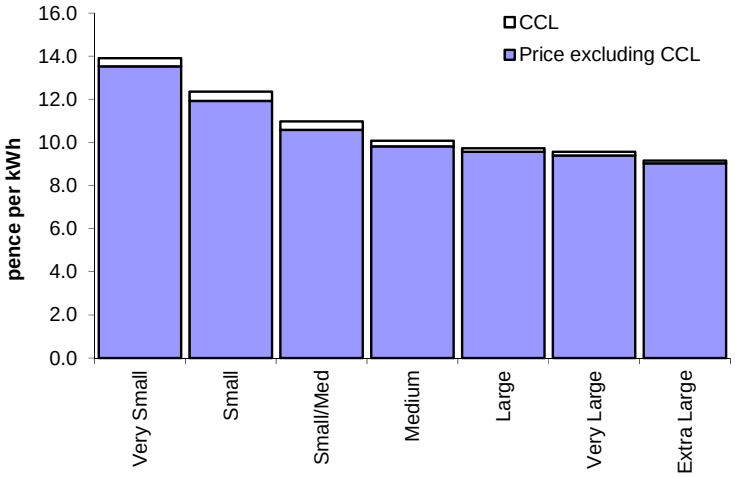
3.4 Gas and electricity prices for the non-domestic sector in the UK

Gas and electricity prices in the non-domestic sector, both including and excluding CCL, for various sizes of consumer are presented in Tables 3.4.1 and 3.4.2.

Average electricity prices, excluding CCL, have risen in cash terms between Q1 2014 and Q1 2015 by an average of 3 per cent to reach a new high. Prices have risen by between 2 and 4 per cent for all consumers but the very largest, where prices were broadly unchanged. Chart 3.4 shows how current prices vary by sizeband.

Average electricity prices, including CCL, increased every quarter from the second quarter of 2004 until the first quarter of 2009, then generally trended down until Q3 2011 when prices started to trend upwards once more. In Q1 2015, the inclusion of CCL increases the average price of electricity by between 1 and 4 per cent.

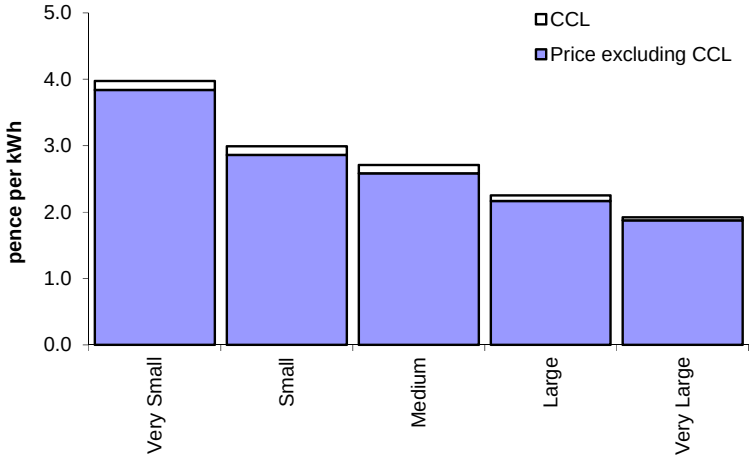
Chart 3.4 Average UK non-domestic electricity prices Q1 2015



Average gas prices excluding CCL have fallen in cash terms between Q1 2014 and Q1 2015 by an average of 10 per cent. Prices have fallen by between 6 and 9 per cent for the smallest consumers and by between 13 and 17 per cent for all other consumers. Average current prices in Q1 2015 have fallen 10 per cent on the high reached in Q1 2014. Chart 3.5 shows how current prices vary by sizeband.

Average gas prices, including CCL, show prices trending upwards from 2004, with a slight seasonal decrease usually evident in the second and third quarter of each year. This decrease was not shown in 2008 due to consistently high wholesale gas prices, and has been less marked than usual in recent years for the same reason. In Q1 2015, the inclusion of CCL increases the average price of gas by between 3 and 5 per cent.

Chart 3.5 Average UK non-domestic gas prices Q1 2015



Link to table:
Table 3.4.1: Price of fuels purchased by non-domestic consumers in the UK

Section 4 – Oil and Petroleum Product Prices

Highlights

- The price of petrol in June 2015 is 10 per cent (13 pence) lower than a year ago, at 116.4 pence per litre, whilst diesel is 10 per cent (14 pence) lower at 121.3 pence per litre. Petrol and diesel prices are around 25 pence lower than their peaks in April 2012

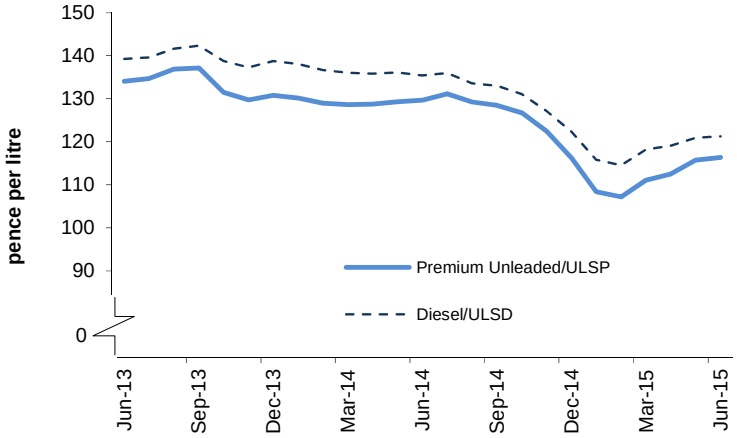
- The price of crude oil purchased by UK refineries in May 2015 was 46 per cent lower than a year ago. The price in June is around $65 per barrel, having previously been above $100 per barrel between February 2011 and September 2014 but falling below $50 per barrel in January 2015.

4.1 Typical retail prices of petroleum prices

Prices of petroleum products, including road fuels, are presented in Tables 4.1.1 to 4.1.3. Prices of unleaded petrol (ULSP) and diesel (ULSD) reached new highs in April 2012, mainly due to the cost of crude oil. Prices in June 2015 are around 25 pence lower than that peak. Prices are also affected by duty rate changes, as listed in Annex C, and by changes in the general rate of VAT.

Chart 4.1 shows that, in mid-June 2015, a litre of ULSP was on average 116.4 pence, 0.6 pence per litre higher than the previous month but 13 pence per litre lower than a year ago. Diesel prices were 121.3 pence per litre, 0.3 pence per litre higher the previous month but 14 pence per litre lower than a year ago. Petrol and diesel prices have increased since February, when they were at the lowest level since the end of 2009. The price differential between ULSP and ULSD in June 2015 was 4.9 pence per litre. The differential has broadly stayed between 4p and 8p for the past 4 years.

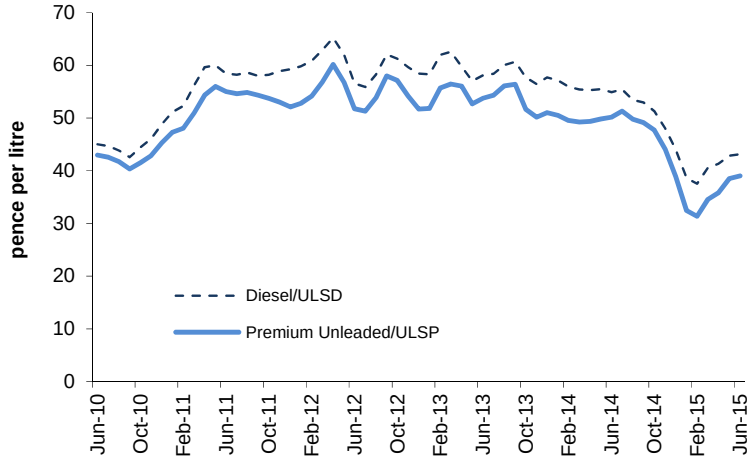
Chart 4.1 Typical retail prices of motor spirits from June 2013 to June 2015



In 2014, annual prices of ULSP and ULSD were lower than the record highs of 2012, by 5.8 per cent and 5.9 per cent respectively. The differential between ULSP and ULSD in 2014 was 6.0 pence per litre, a slight fall on 2013. Motor fuel prices increased at a steady rate from the Gulf crisis in 1990/91 to 2000, chiefly as a result of duty changes. Since 2000, prices have followed oil prices, increasing strongly in 2008, falling back in 2009, and then increasing strongly once more in 2010 and 2011 before levelling off in 2012 and falling in 2013 and 2014.

The price of unleaded petrol, excluding tax, in June 2015 is 35 per cent lower than the peak in April 2012, as shown in Chart 4.2. The price of diesel, excluding taxes, is 34 per cent lower than the April 2012 peak.

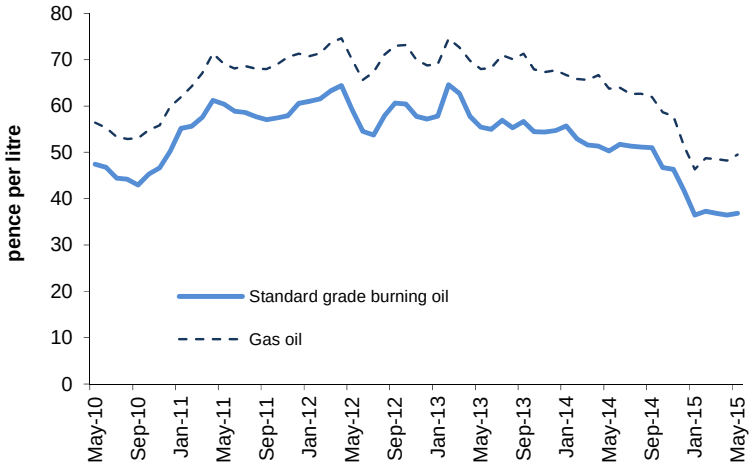
Chart 4.2 Price of unleaded petrol and diesel excluding taxes June 2010 to June 2015



Retail prices of standard grade burning oil (SGBO) and gas oil, as shown in Chart 4.3, are more directly influenced by the price of crude oil than other petroleum products, due to lower rates of duty and VAT.

The price of SGBO in May 2015 was 43 per cent lower than February 2013, which was the highest level since July 2008. The price of gas oil in May 2015 was 34 per cent lower than April 2012, which was the highest level since our records started in 1989. In May 2015 the price of SGBO was 27 per cent lower than a year ago, whilst gas oil was 22 per cent lower.

Chart 4.3 Typical retail prices of standard grade burning oil and gas oil May 2010 to May 2015



Link to tables:
Table 4.1.1: Typical monthly retail prices of petroleum products and a crude oil index
Table 4.1.3: Typical retail prices of petroleum products 1978 to 2015

4.2 Crude oil prices

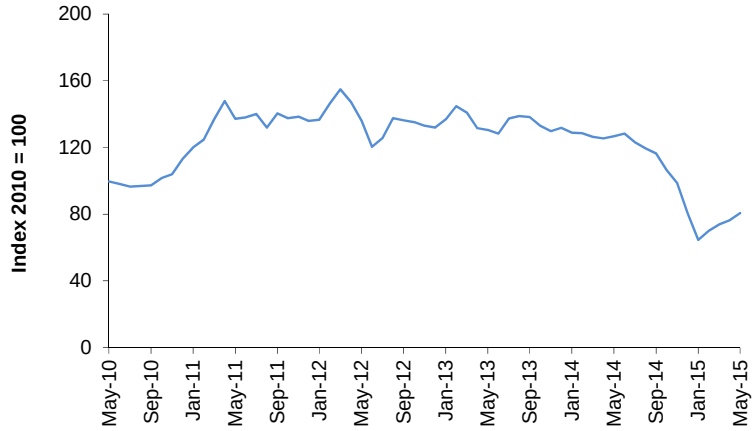
Movements in the price of crude oil affect the prices of various domestic and industrial fuels, as well as petroleum products. A price index for crude oil is presented in Tables 4.1.1 and 4.1.2 for comparison against the prices of petroleum products.

The price of crude oil can change for a variety of reasons, such as: oil shortages (1973); over-supply and weaker demand (1998); Hurricanes (Katrina and Rita, 2005); the global recession (2008-9); and geopolitical tensions (2008 onwards). In July 2008, average monthly crude oil prices reached a new high in real terms, 10.5 per cent higher than the late 1970's. More recently, oil prices were almost consistently above $100 per barrel between February 2011 and September 2014, when prices fell below $100 per barrel due to weak demand and increased supply. By mid-January 2015, prices fell below $50 per barrel for the first time since 2009, but prices have since increased to around $65 per barrel.

OPEC's 167th Meeting took place on 5 June 2015 in Vienna. The Conference reviewed the oil market outlook, and noted that the global economic recovery had stabilised, with growth at modest levels. The sharp decline in oil prices at the end of 2014 and start of 2015, caused by over-supply and speculation, had abated, with prices moving slightly higher in recent months. World demand is forecast to increase in the second half of 2015 and in 2016. Accordingly, in the interest of maintaining a stable and balanced market with prices at levels that suit both producer and consumer, the Conference resolved to maintain the production level of 30 million barrels per day (mb/d). The next meeting will convene on 4 December 2015.

Chart 4.4 shows the price of crude oil acquired by UK refineries. In May 2015 the price was 46 per cent lower than a year ago. The average cost of crude oil acquired by UK refineries in May 2015 has risen since the low of December 2008 by 52 per cent. Prices are 48 per cent lower than March 2012, which was the highest level since our records began in 1991.

Chart 4.4 Index(1) of crude oil prices May 2010 to May 2015



(1)The index represents the average price paid by refineries for the month and is calculated in sterling on a cif basis, see Annex A.

The annual price for 2014 was 13 per cent lower than 2013 and 14 per cent lower than the high of 2012. Over the past five years (May 2010 to May 2015) the average cost of crude oil acquired by refineries has decreased by around 20 per cent.

Link to tables:
Table 4.1.1: Typical monthly retail prices of petroleum products and a crude oil index
Table 4.1.2: Average annual retail prices of petroleum products and a crude oil price index

Section 5 – International Comparisons

Highlights

- In May 2015 the UK price for petrol was third highest in the EU 15 at 115.7 pence per litre, whilst the UK price for diesel was the highest in the EU 15 at 121.0 pence per litre.
- For July to December 2014, UK industrial electricity prices for medium consumers including tax were the third highest in the EU 15, whilst industrial gas prices for medium consumers including tax were the fourth lowest in the EU 15.
- For July to December 2014, UK domestic gas and electricity prices, including tax, were second and eighth lowest respectively in the EU 15.

Notes

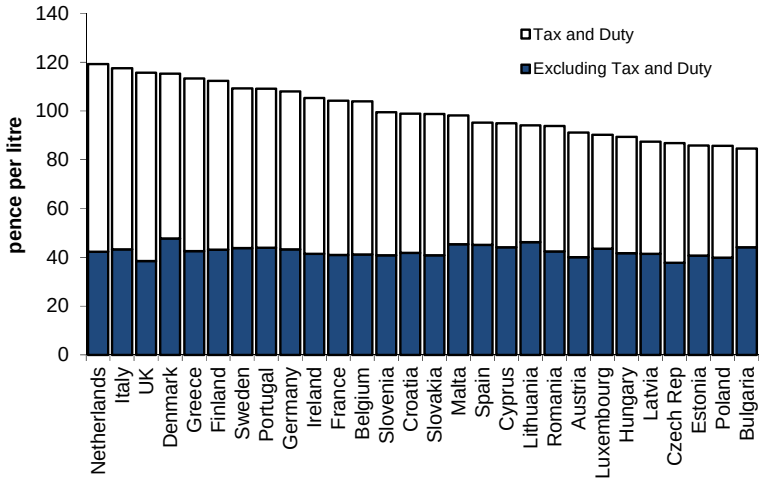
International prices vary for many reasons including differences in indigenous resources and market structures, and varying exchange rates and inflation rates (for example, the pound depreciated against the euro by around 6 per cent between the second half of 2012 and the same period in 2013).

5.1 Unleaded petrol and Diesel prices in the EU

5.1.1 Premium unleaded petrol prices in the EU

Chart 5.1 shows that average UK unleaded petrol prices, including taxes, in May 2015 were the third highest in the EU at 115.7 pence per litre when presented in a common currency basis. The highest price was in the Netherlands at 119.3 pence per litre, whilst the lowest price was in Bulgaria at 84.6 pence per litre.

Chart 5.1.1 Average EU premium unleaded petrol prices in pence per litre as at May 2015



Source: European Commission Oil Bulletin

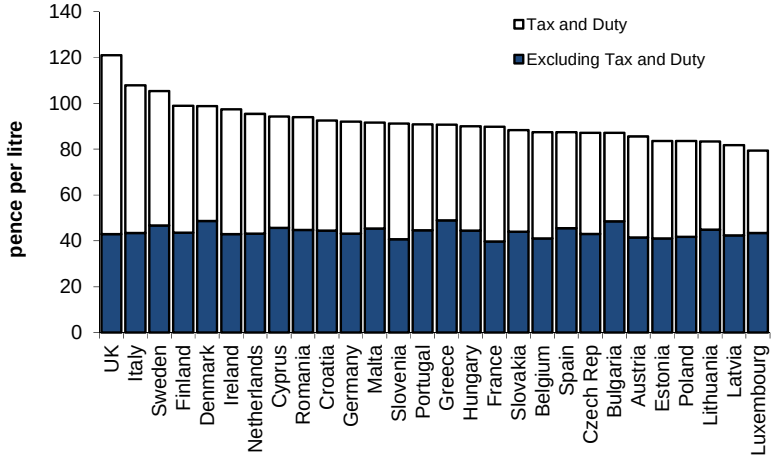
Link to table:
Table 5.1.1: Premium unleaded petrol prices in the EU

5.1.2 Diesel prices in the EU

Chart 5.2 shows that average UK diesel prices, including taxes, in May 2015 were the highest within the EU at 121.0 pence per litre. The lowest price was in Luxembourg at 79.3 pence per litre.

The high UK diesel price is mainly due to the taxes levied, which formed 65 per cent of the total price in May 2015, compared to a range of 44 to 60 per cent in the rest of the EU.

Chart 5.1.2 Average EU diesel prices in pence per litre as at May 2015



Source: European Commission Oil Bulletin

Link to table:
Table 5.2.1: Diesel prices in the EU

5.2 Industrial gas and electricity prices

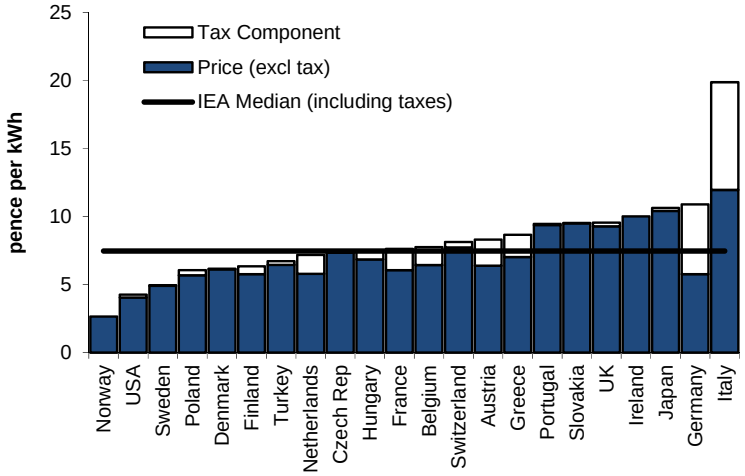
Prices for gas and electricity in this section will vary depending on the periodicity (6-monthly or annual) and consumption (banded or an overall average) of the tables. In general, the 6-monthly Eurostat EU28 tables have more timely data and reflect changes on a shorter timescale, but comparisons with non-EU countries require the annual IEA tables.

Rankings may differ between the IEA and Eurostat tables. Charts only include data from the countries available at the time of publication. The black line on the charts shows the median, this is produced using the data from all available countries as well as DECC estimates for the countries with missing data.

5.2.1 Average annual industrial electricity prices, IEA

In 2014, average UK industrial electricity prices, including taxes, were the fifth highest in the IEA, fourth highest in the G7, and were 28 per cent above the IEA median price, as shown in Chart 5.2.1. Prices in the UK excluding taxes were the sixth highest in the IEA, third highest in the G7, and were 45 per cent above the IEA median price of 6.4 pence. The UK price rose between 2013 and 2014 by 7 per cent, compared to falls for most other countries. This difference in growth rates was partly driven by movements in exchange rates of around 6 per cent in the EU and 10 to 15 per cent in the wider IEA.

Chart 5.2.1 Average industrial electricity prices in 2014, IEA



Notes: Data for 2014 is not available for Australia, Canada, Korea, Luxembourg, New Zealand, and Spain.

The excluding tax price for the USA has been estimated using a weighted average of general sales taxes and fuel taxes levied by individual states.

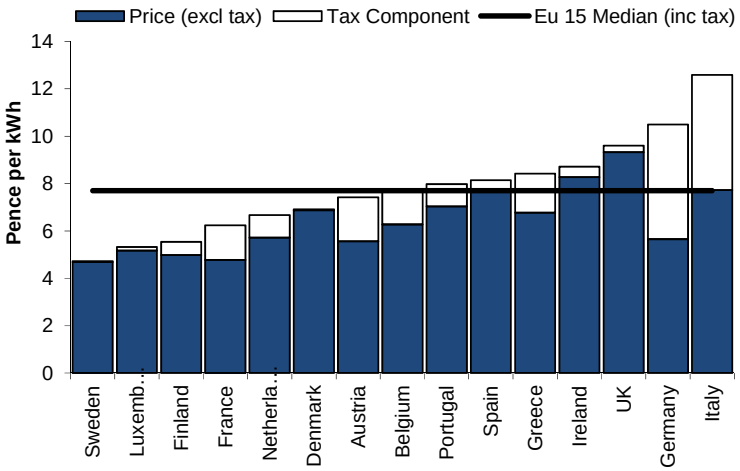
Source: IEA Energy Prices and Taxes.

Link to table:
Table 5.3.1: Industrial electricity prices in the IEA including and excluding taxes

5.2.2 Average industrial electricity prices in the EU by size of consumer

Average UK industrial electricity prices including taxes for medium consumers for the period July to December 2014 were the third highest in the EU15 and were 25 per cent above the estimated EU15 median, as shown in Chart 5.2.2. The UK price for medium consumers excluding taxes was the highest in the EU15 and was 49 per cent above the median price of 6.3 pence. Annual 2014 prices for medium consumers including tax were the third highest in the EU15.

Chart 5.2.2 Average industrial electricity prices for medium consumers in the EU 15 for July – December 2014

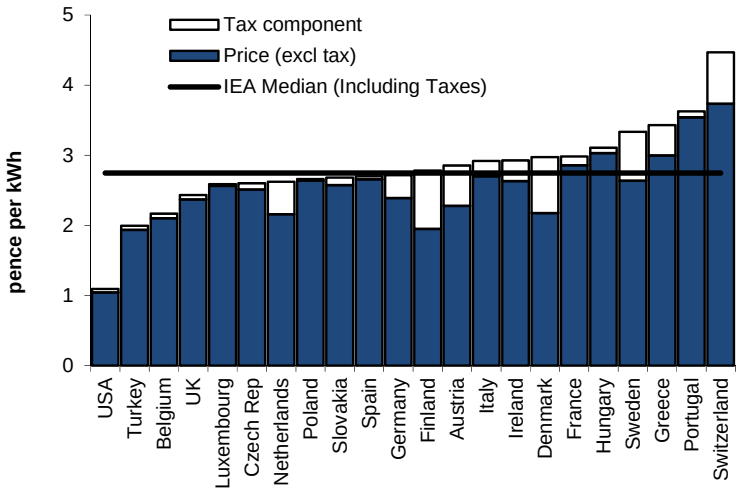


Link to table:
Table 5.4.1: Average industrial electricity prices in the EU

5.2.3 Average annual industrial gas prices, IEA

In 2014, average UK industrial gas prices, including taxes where not refunded, were the sixth lowest in the IEA, third lowest in the G7, and were 11 per cent below the IEA median, as shown in Chart 5.2.3. Prices in the UK excluding taxes were the tenth lowest in the IEA, third lowest in the G7, and were 7.7 per cent below the IEA median of 2.6 pence.

Chart 5.2.3 Average industrial gas prices in 2014, IEA



Notes: Data for 2014 is not available for Australia, Canada, Japan, Korea, New Zealand, and Norway.

The excluding tax price for the USA has been estimated using a weighted average of general sales taxes and fuel taxes levied by individual states.

The excluding tax price for Korea for some recent years has been estimated using average tax rates for years where both including and excluding tax data is available.

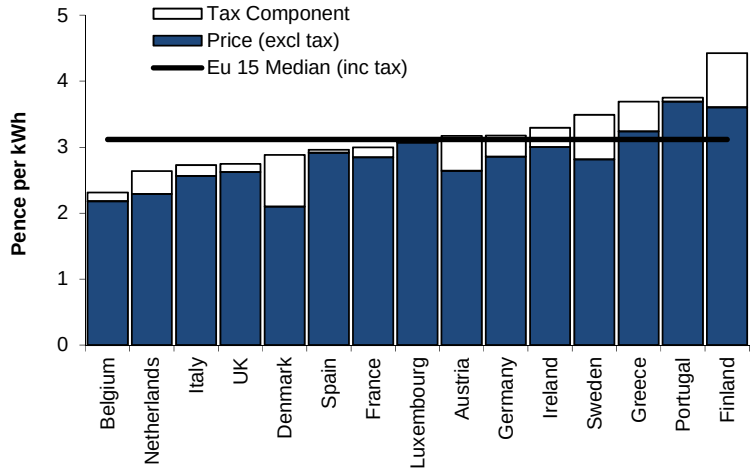
Source: IEA Energy Prices and Taxes.

Link to table:
Table 5.7.1: Industrial gas prices in the IEA including and excluding taxes

5.2.4 Average industrial gas prices in the EU by size of consumer

Chart 5.2.4 shows that average UK industrial gas prices for the period July to December 2014, including taxes, for medium consumers were the fourth lowest in the EU15 and were 12 per cent below the median price. UK prices excluding taxes for medium consumers were the fifth lowest in the EU15 and were 7.9 per cent below the EU15 median of 2.8 pence. Annual 2014 prices for medium consumers including tax were the second lowest in the EU15.

Chart 5.2.4 Average industrial gas prices for medium consumers in the EU 15 for July – December 2014



Medium consumers are defined as having an annual consumption of 2,778 – 27,777 MWh.

Source: Eurostat Statistics in Focus Electricity prices for EU Industry July – December 2014.

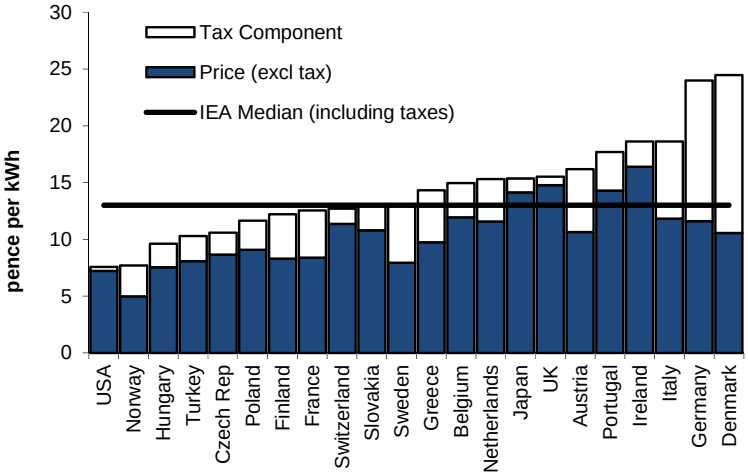
Link to table:
Table 5.8.1: Average industrial gas prices for small consumers in the EU

5.3 Domestic electricity and gas prices

5.3.1 Average annual domestic electricity prices, IEA

In 2014, average UK domestic electricity prices, including taxes, were the eighth highest in the IEA, third highest in the G7, and were 19 per cent above the IEA median, as shown in Chart 5.3.1. Prices in the UK excluding taxes were the third highest in the IEA, the highest in the G7, and were 38 per cent above the IEA median of 10.7 pence.

Chart 5.3.1 Average domestic electricity prices in 2014, IEA



Notes: Data for 2014 is not available for Australia, Canada, Luxembourg, New Zealand, and Spain. The excluding tax price for the USA has been estimated using a weighted average of general sales taxes and fuel taxes levied by individual states.

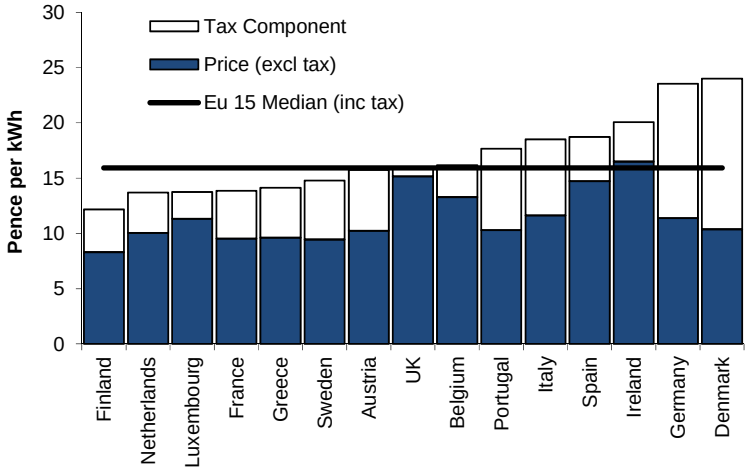
Source: IEA Energy Prices and Taxes.

Link to table:
Table 5.5.1: Domestic electricity prices in the IEA including and excluding taxes.

5.3.2 Average domestic electricity prices in the EU by size of consumer

Chart 5.3.2 shows that the average UK domestic electricity price including taxes for medium consumers for July to December 2014 was the eighth lowest in the EU 15 and was the EU 15 median price. The UK price excluding taxes was the second highest in the EU15 and was 46 per cent above the median level of 10.8 pence. Annual 2014 prices for medium consumers including tax were the seventh lowest in the EU15. In general, small consumers pay the highest prices, with the notable exception of The Netherlands, where small consumers pay 65 per cent less than medium consumers.

Chart 5.3.2 Average domestic electricity prices for medium consumers in the EU 15 for July – December 2014



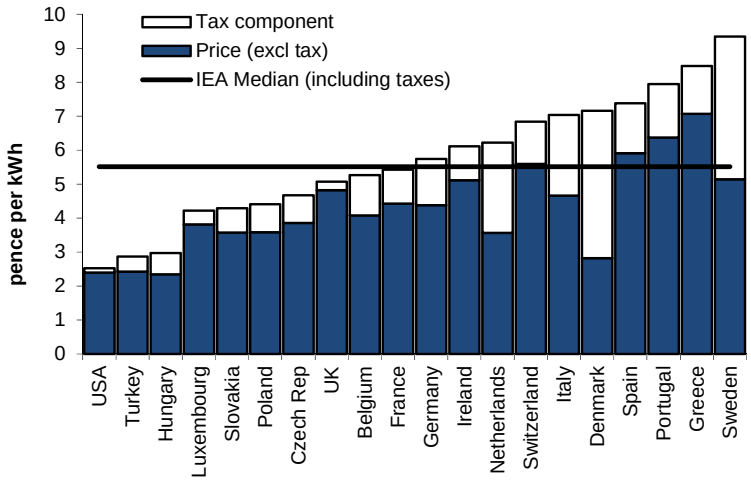
Medium consumers are defined as having an annual consumption of 2,500 - 4,999 kWh per annum.
Source: Eurostat Statistics in Focus Electricity prices for EU households, July – December 2014

Link to table:
Table 5.6.1: Average domestic electricity prices for small consumers in the EU

5.3.3 Average annual domestic gas prices, IEA

Chart 5.3.3 shows that, in 2014, average UK domestic gas prices, including taxes, were the tenth lowest in the IEA, third lowest in the G7, and were 9.0 per cent lower than the IEA median. Prices in the UK excluding taxes were the ninth highest in the IEA, second highest in the G7, and were 17 per cent above the IEA median of 4.1 pence.

Chart 5.3.3 Average domestic gas prices in 2014, IEA



Notes: Data for 2014 is not available for Australia, Austria, Canada, Finland, Japan, New Zealand, and Norway. Excluding tax data is not available for Korea.

Prices for Finland are for district heating, not central heating as is the case in other countries.

The excluding tax price for the USA has been estimated using a weighted average of general sales taxes and fuel taxes levied by individual states.

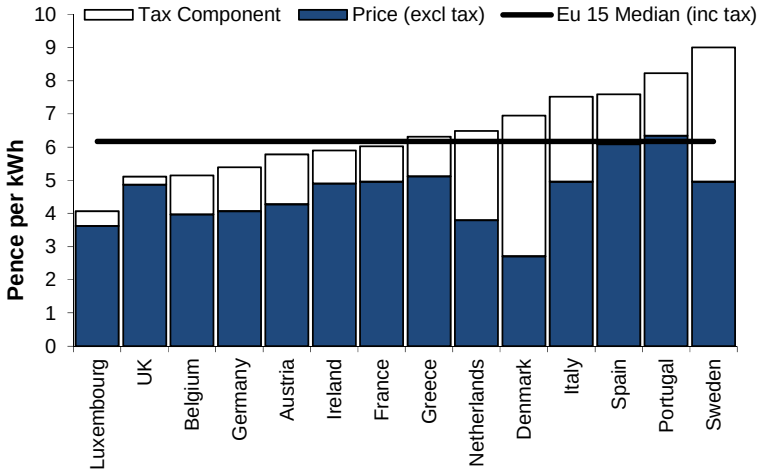
Source: IEA Energy Prices and Taxes.

Link to table:
Table 5.9.1: Domestic gas prices in the EU 15 and G7 countries including and excluding taxes

5.3.4 Average domestic gas prices in the EU by size of consumer

Chart 5.3.4 shows that average UK domestic gas prices, including taxes, for medium consumers for the period July to December 2014 were the second lowest in the EU 15 and were 17 per cent lower than the median. The UK price excluding taxes was the seventh lowest in the EU 15 and was 0.4 per cent lower than the median price of 3.7 pence. Annual 2014 prices for medium consumers including tax were the second lowest in the EU15.

Chart 5.3.4 Average domestic gas prices for medium consumers in the EU 15 for July – December 2014



Medium consumers are defined as having an annual consumption of 5,557 – 55,556 kWh per annum.
Finland does not provide data to Eurostat for this series.
Source: Eurostat Statistics in Focus Electricity prices for EU households, July – December 2014.

Link to table:
Table 5.10.1: Average domestic gas prices for small consumers in the EU

List of Charts

Explanatory notes

General

More detailed notes on the methodology used to compile the figures and data sources are available on the DECC section of the gov.uk website.

Symbols used in the tables

.. not available
- nil or not separately available
p provisional
r revised; where a column or row shows 'r' at the beginning, most, but not necessarily all, of the data have been revised.
e estimated; totals of which the figures form a constituent part are therefore partly estimated

Notes to tables

- Figures for the latest periods and the corresponding averages (or totals) are provisional and are liable to subsequent revision.
- The figures have not been adjusted for temperature or seasonal factors except where noted.
- Due to rounding the sum of the constituent items may not equal the totals.
- Percentage changes relate to the corresponding period a year ago. They are calculated from unrounded figures but are shown only as (+) or (-) when the percentage change is very large.
- All figures relate to the United Kingdom unless otherwise indicated.

Conversion factors

1 tonne of crude oil =	7.55 barrels
1 tonne =	1,000 kilograms
1 gallon (UK) =	4.54609 litres
1 kilowatt (kW) =	1,000 watts
1 megawatt (MW) =	1,000 kilowatts
1 gigawatt (GW) =	1,000 megawatts
1 terawatt (TW) =	1,000 gigawatts

All conversion of fuels from original units to units of energy is carried out on the basis of the gross calorific value of the fuel. More detailed information on conversion factors and calorific values is given in Annex A of the Digest of United Kingdom Energy Statistics.

Conversion matrices

To convert from the units on the left hand side to the units across the top multiply by the values in the table.

To:	**Thousand toe**	**Terajoules**	**GWh**	**Million therms**
From	**Multiply by**			
Thousand toe	1	41.868	11.630	0.39683
Terajoules (TJ)	0.023885	1	0.27778	0.0094778
Gigawatt hours (GWh)	0.085985	3.6000	1	0.034121
Million therms	2.5200	105.51	29.307	1

To:	**Tonnes of oil equivalent**	**Gigajoules**	**kWh**	**Therms**
From	**Multiply by**			
Tonnes of oil equivalent	1	41.868	11,630	396.83
Gigajoules (GJ)	0.023885	1	277.78	9.4778
Kilowatt hours (kWh)	0.000085985	0.003600	1	0.034121
Therms	0.0025200	0.105510	29.307	1

Note that all factors are quoted to 5 significant figures

Abbreviations

GDP	Gross domestic product
UKCS	United Kingdom continental shelf
VAT	Value added tax

Climate Change Levy (CCL)

The Climate Change Levy came into effect on 1 April 2001. This levy is designed to encourage businesses to reduce their energy consumption so as to reduce global warming. For information about the Climate Change Levy please contact the HM Revenue & Customs National Advice Service on 0300 200 3700.

Department of Energy & Climate Change
3 Whitehall Place
London SW1A 2AW
www.gov.uk/decc
URN 15D/276B