

Power and Gas Utilities - Europe

Market Analysis – 2015-2020 Trends – Corporate Strategies

Publication date: September 2015

Exclusive extracts from this 199-page-long report:

- What is the business?

EU's largest power producers are active throughout the entire electricity and gas value chain and their operations involve:

- purchasing, producing and marketing gas and electricity;
- storing and distributing gas and transmitting electricity, as well as developing the adequate infrastructure;
- providing energy and environmental management related services. [...]

- Who are the key players?

Most analysed companies have a pan-European and/or international presence, and are leading utility companies in their home markets: Engie and EDF in France, Centrica in the UK, E.ON and RWE in Germany, Enel in Italy, Iberdrola in Spain. Companies such as Vattenfall, CEZ, Fortum or SSE are more regional players. [...] Companies analysed in the report include: **e.on, Engie, Enel, EDF, RWE, SSE, Iberdrola, Centrica, Vattenfall, Fortum and CEZ.**

- How intense is competition?

Macro-economic and industry-specific factors have profoundly shaken up the competitive dynamics in the sector. Numerous structural and asset-related competitive advantages have been lost and renewable energy and downstream activities have become hotbeds of competition. [...]

- What are the main markets?

European utilities still derive the majority of revenues from their domestic market and that of other European countries. Over the past few years, power and gas groups have been facing difficulties in these markets. As demand remains sluggish, the price of wholesale electricity has fallen due to the increased share of subsidised renewables. Therefore, strategies have been shifted towards asset rationalisation and integration to optimise costs. Investments have been downsized and channeled towards renewables and overseas expansion. [...]

To find out more on the sector and its leading corporations, please find enclosed the order form to obtain this exclusive report by Xerfi Global.

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Analyst, Xerfi Global

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