



AFEER 2018 CONFERENCE

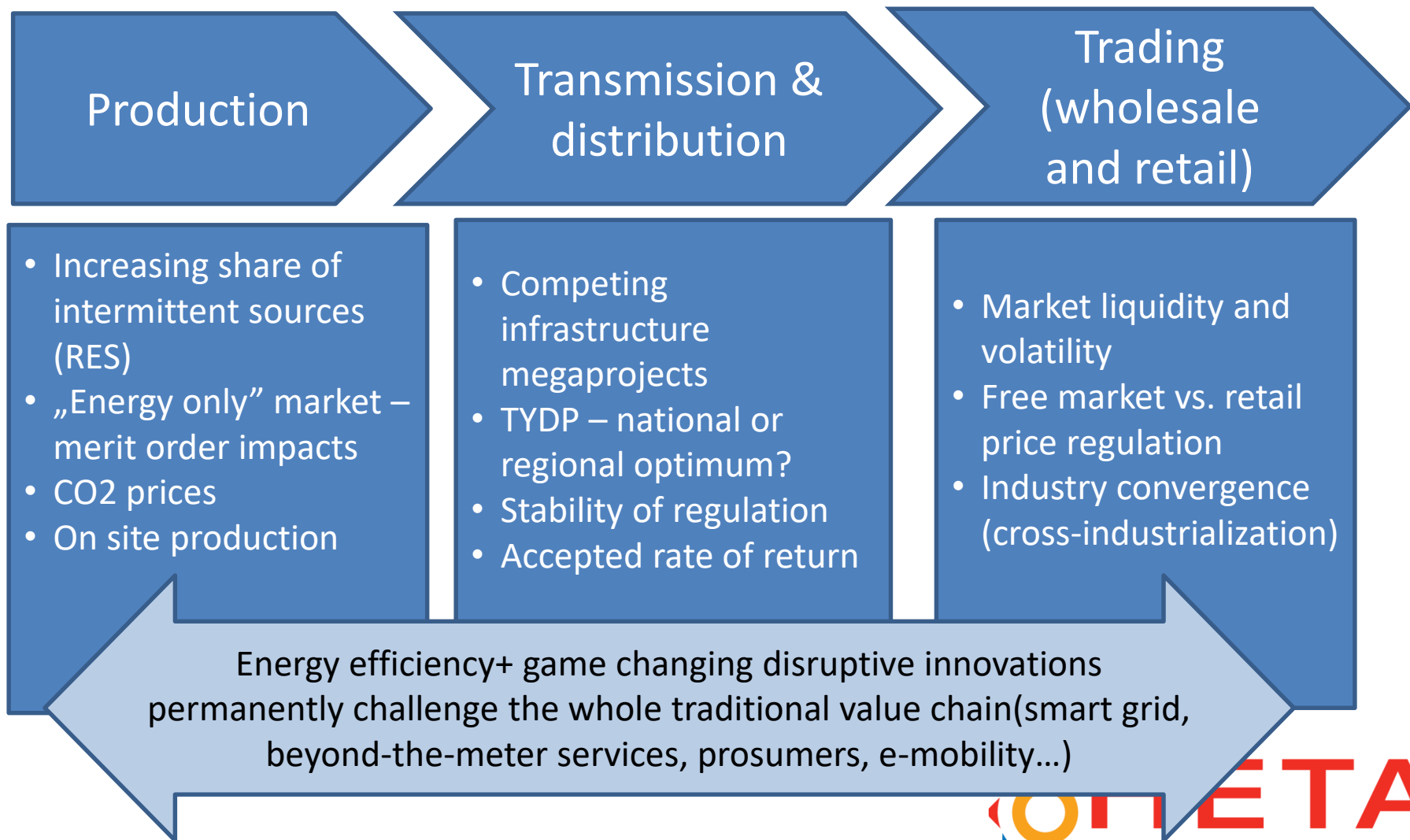
Bucharest, 15/11/2018

Balázs Felsmann

Chairman of the Hungarian Energy Traders' Association



Industry value chain and investment concerns



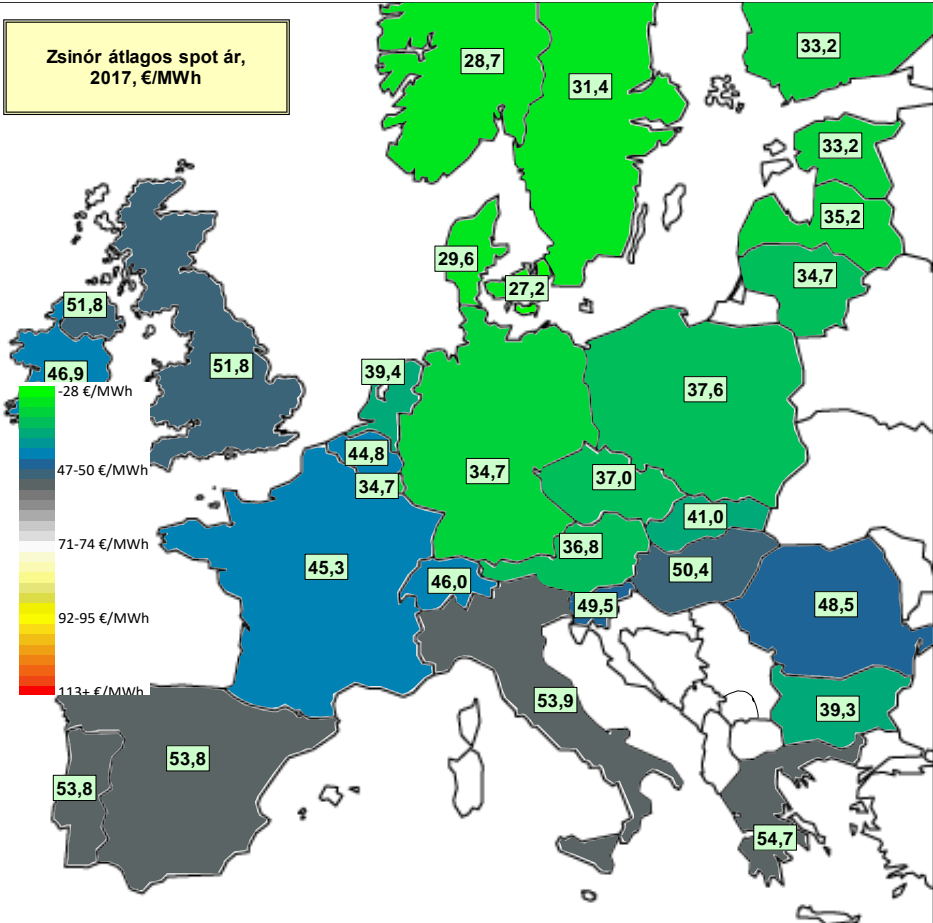
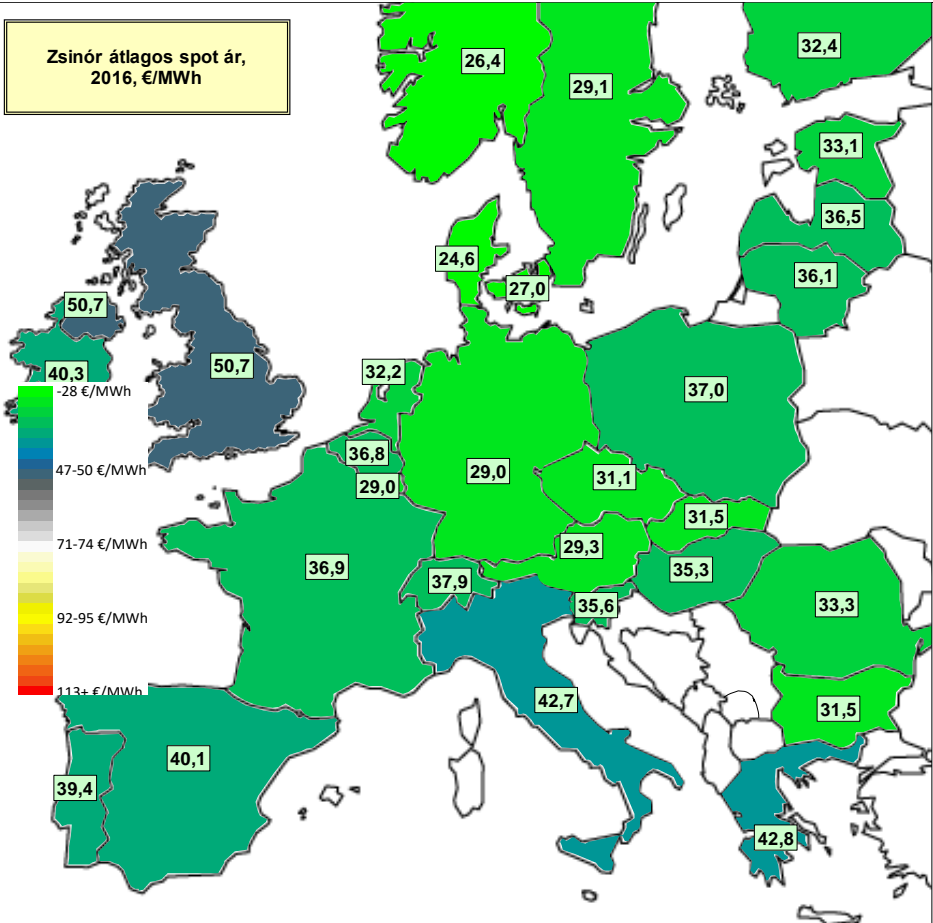


Hot topics for HU energy retailers in the „Clean Energy for All Europeans” package

- Right to switch and rules on switching-related fees
- Energy storages
- Comparison tools
- Energy communities
- Electromobility
- Smart metering system
- Future of regulated retail prices



Significant increase of wholesale prices



Source: ENTSO-E

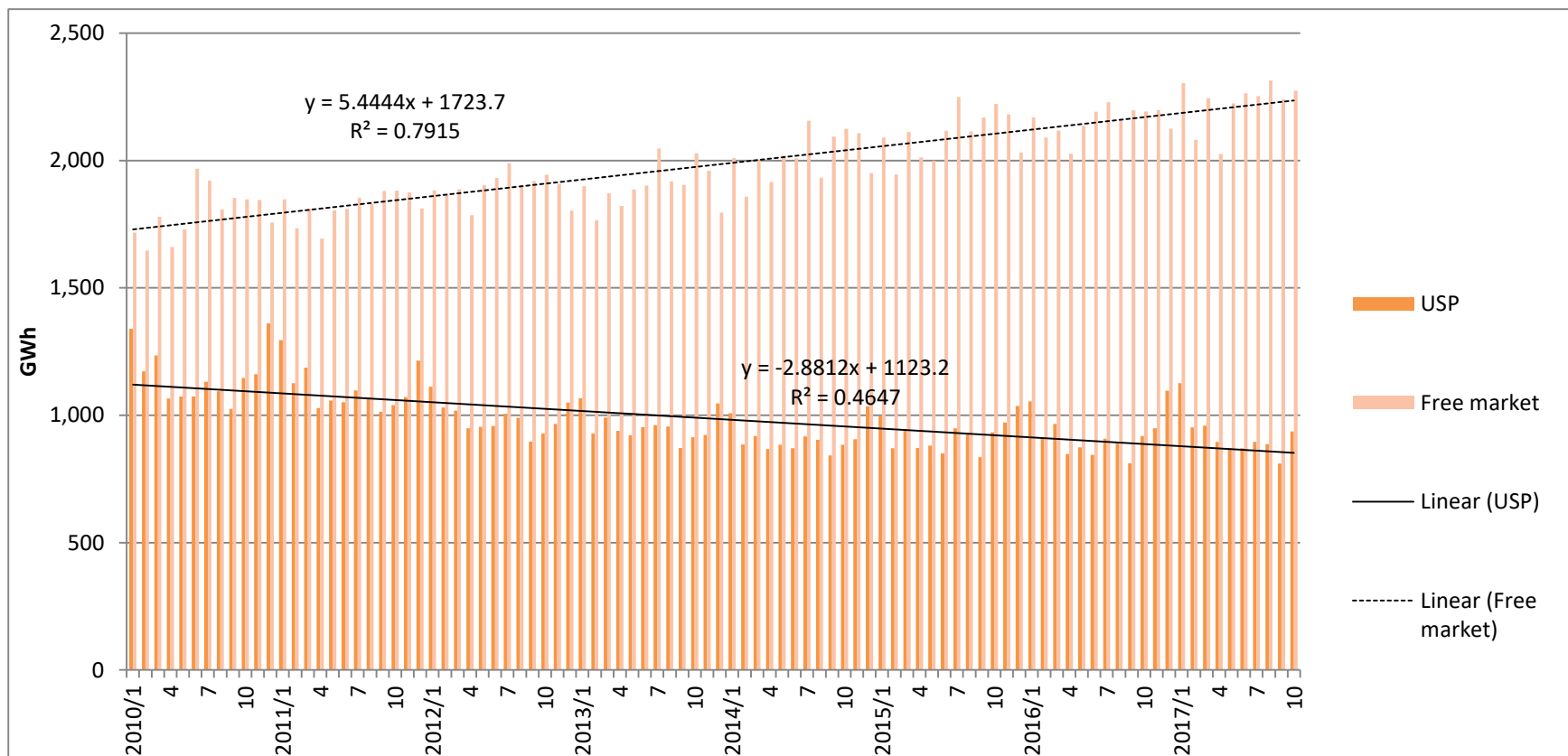
Regional price trends



- Decreasing trend until 2016, thanks to the low input prices (gas, coal, CO2), than quick increase
- Very significant price increase in 2018 in all regional markets
- Average HU price in 2017 was 50,4 €/MWh. In September 2018 the base 2019 price increased to 61 €/MWh
- Similar price trends in other markets (DE-CZ-SK-RO: 55-56 €/MWh, AT: 58 €/MWh, PL: 60€/MWh)

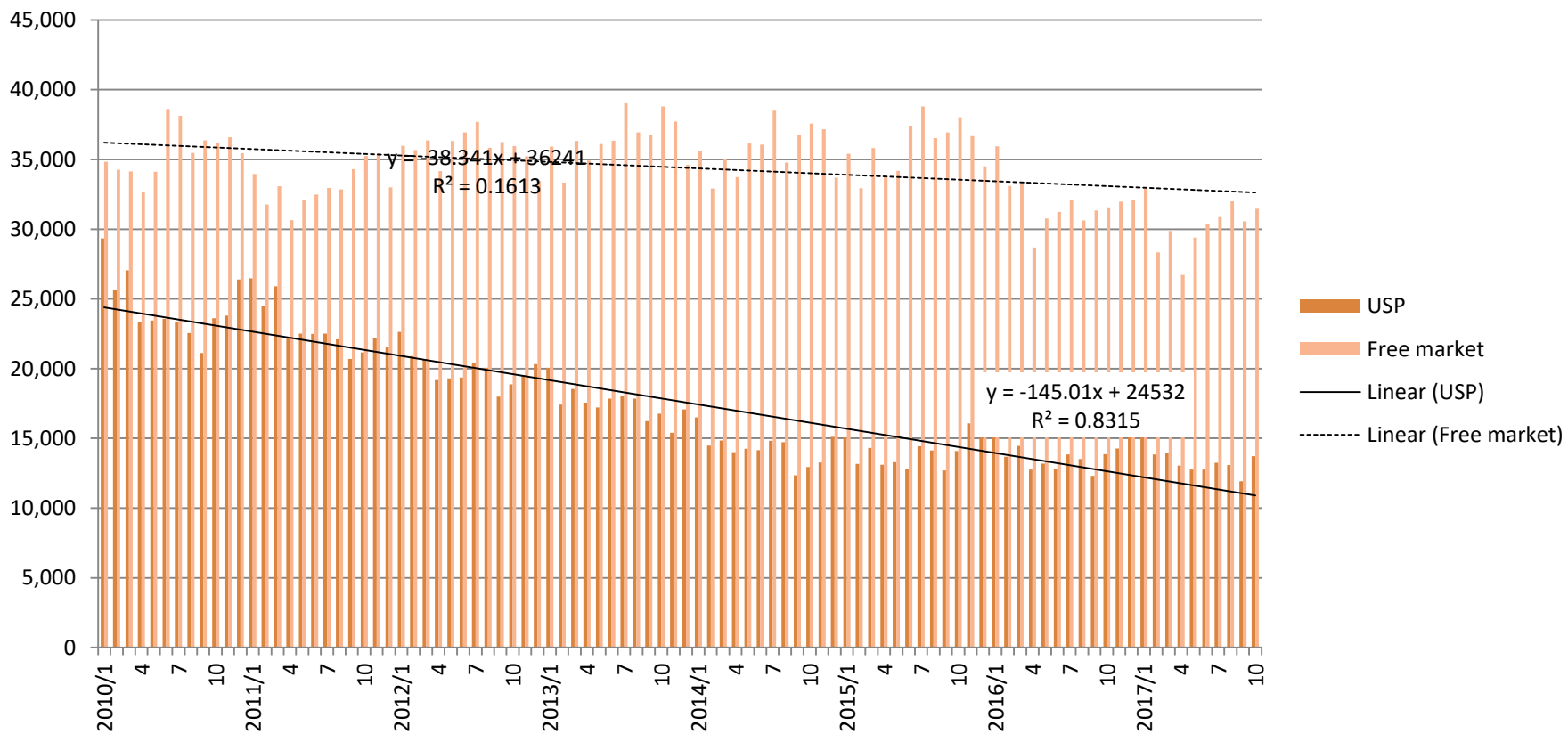


HU retail market in quantities

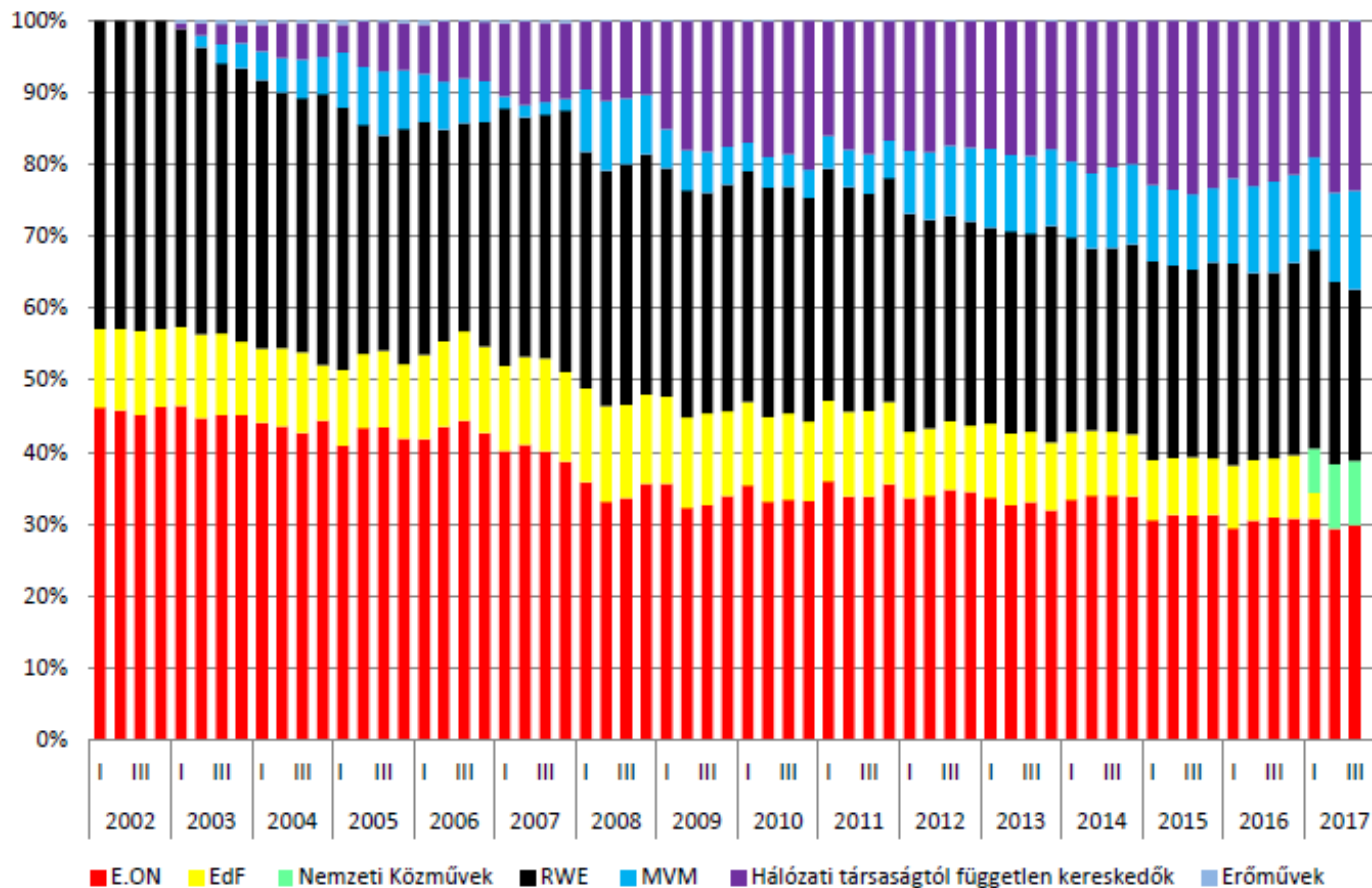




HU retail market in values

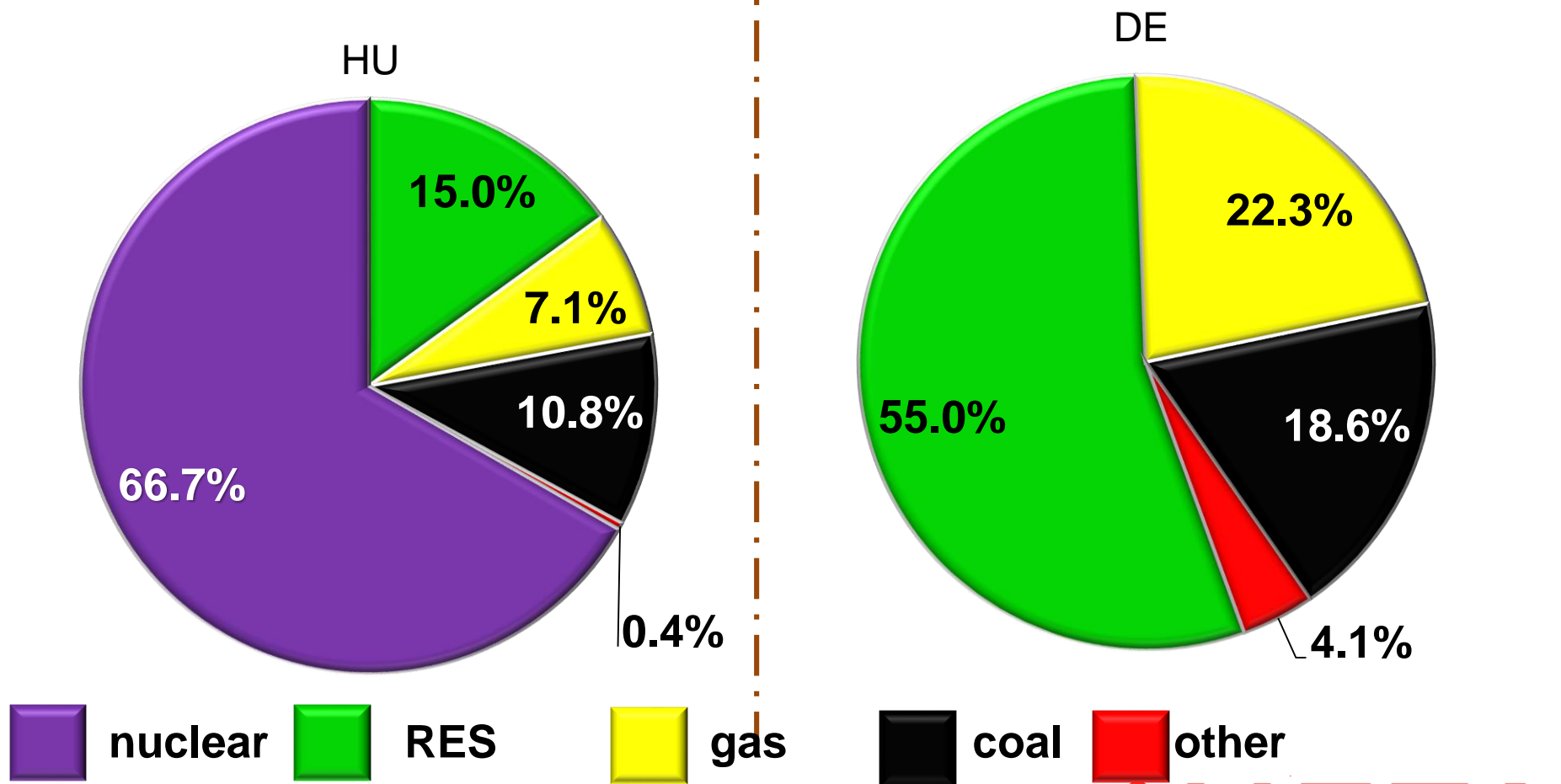


Market share of leading electricity retailers in Hungary



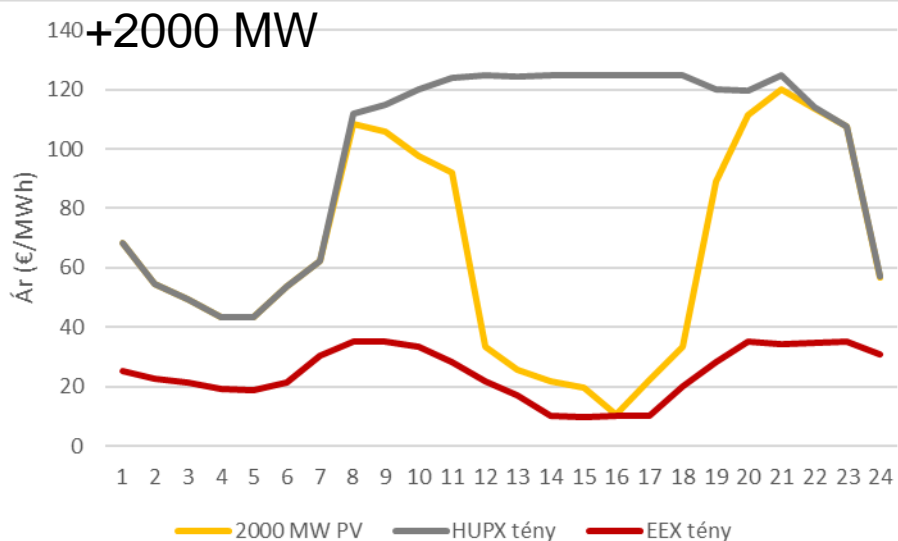
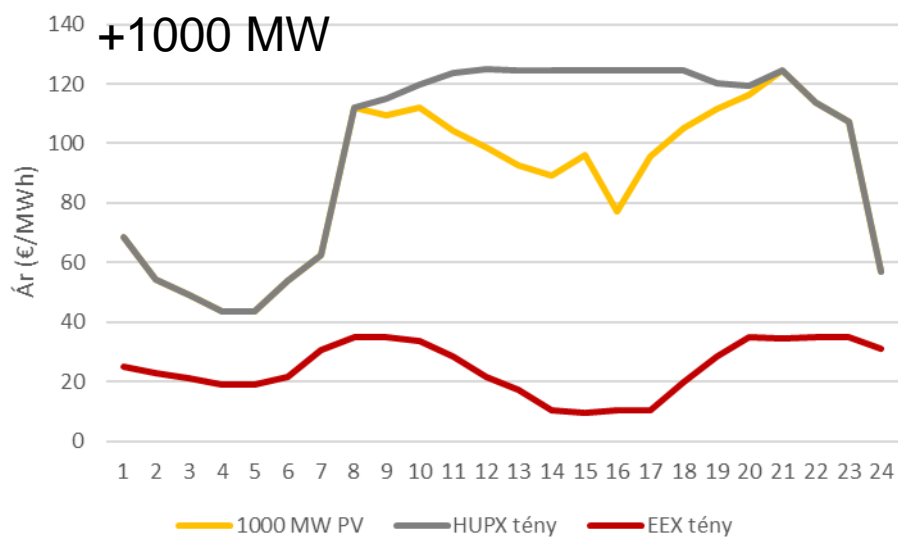
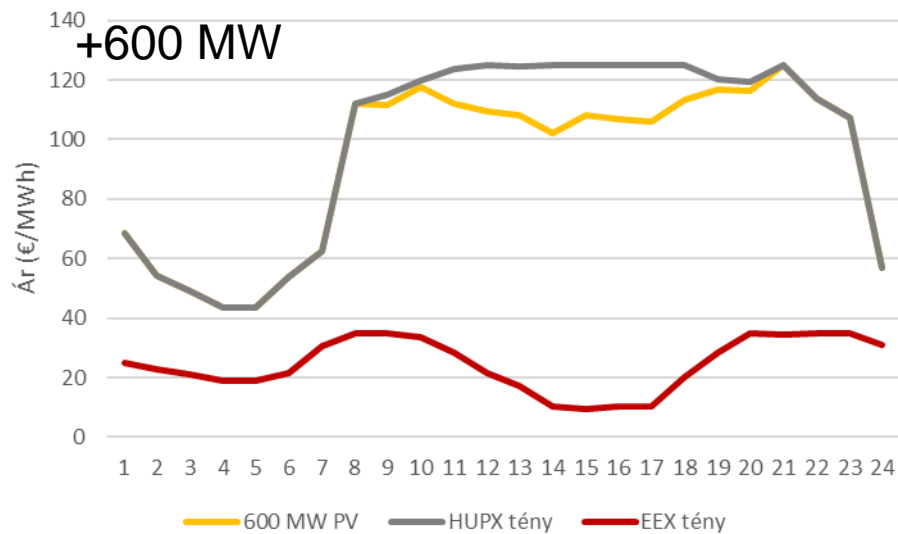
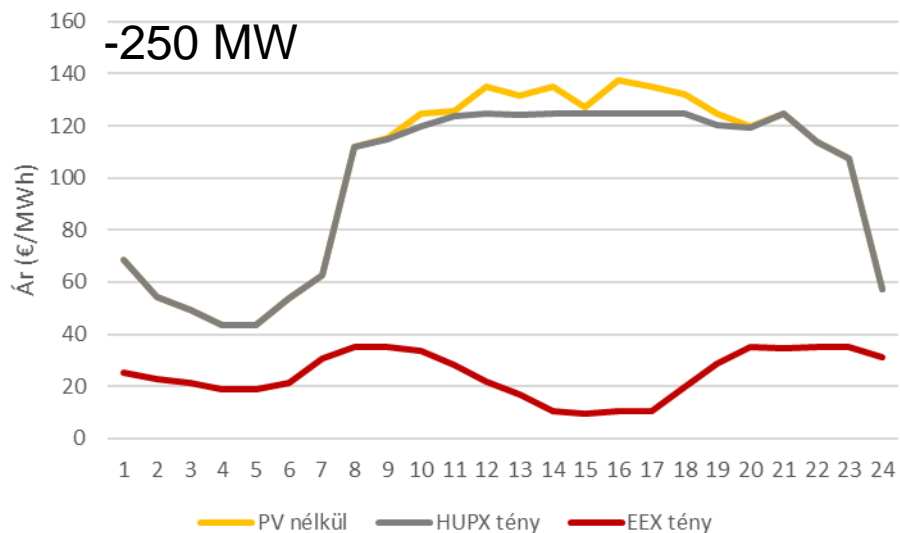
Different visions on future electricity production

Comparison of the HU and DE planned electricity production in 2030



Potential prices impacts of increasing solar capacities

(model results for 04.08.2017 Source: REKK Regional Policy Research Centre)

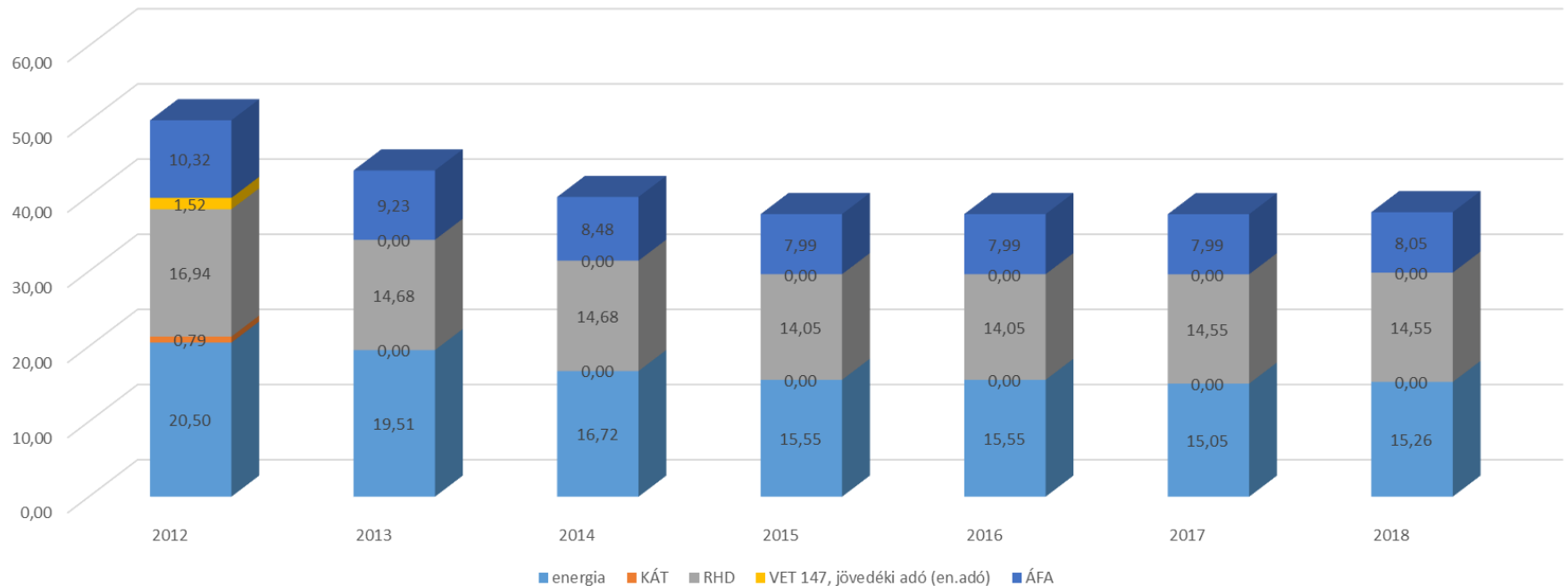




BACKUP SLIDES

Retail electricity prices (domestic)

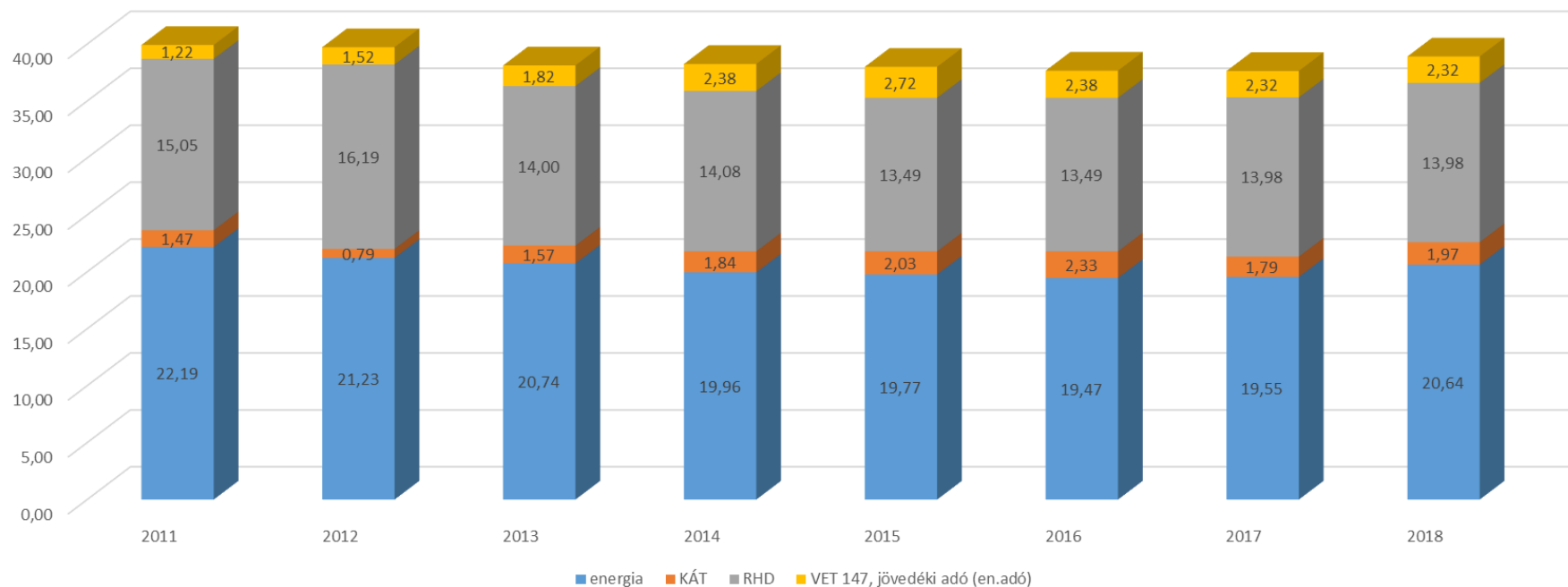
Universal service tariff "A1" 2.500 kWh/yr domestic price





Retail prices 2. (SME USP price)

Universal service tariff "A1" 100 MWh/yr SME price





Retail prices 3. (free market)

