



Australian Government



AUSTRALIAN
ENERGY
REGULATOR

Annual retail markets report 2024–25

Retailer report cards

December 2025

Customer numbers

as at 30 June 2025

Residential

181,420

Electricity

111,053

Gas



2.6%

Market share



4.7%

Market share

Small business



13,623

Electricity
2.1% market share



2,157

Gas
2.9% market share

Customer debt

(excludes hardship customers)

as at 30 June 2025

Residential



3.6%

of customers
in debt



\$767

average
energy debt



3.1%

National average



\$1,367

National average

Small business



3.3%

of customers
in debt



\$1,715

average
energy debt



3.5%

National average



\$2,516

National average

Residential payment plans

as at 30 June 2025

Electricity



466

0.3% of customers



1.5%

National average

Gas



241

0.2% of customers



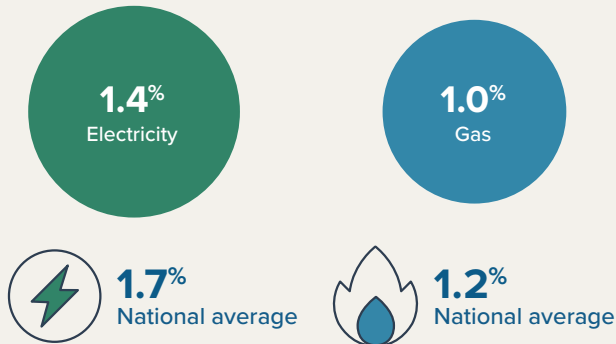
1.1%

National average

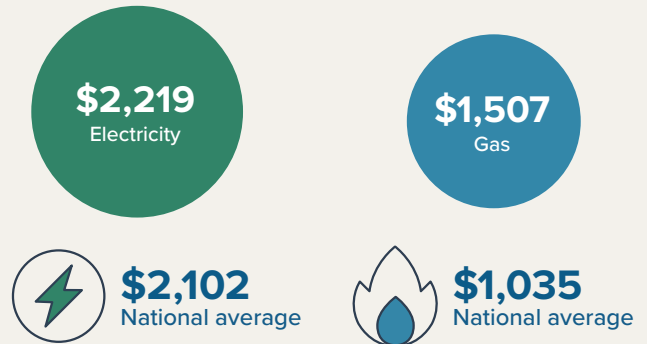
Residential hardship

as at 30 June 2025

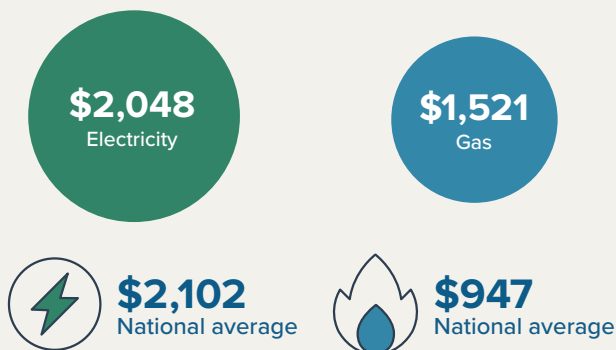
Customers on hardship programs



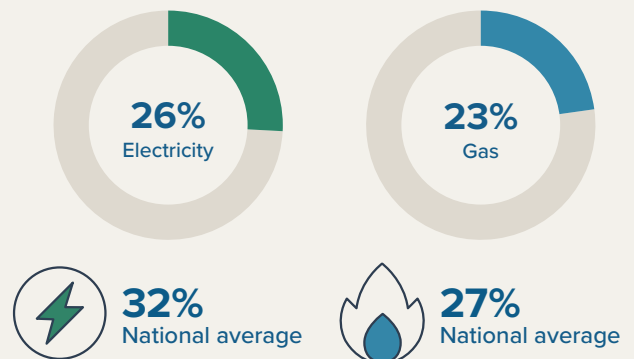
Average hardship customer debt on entry



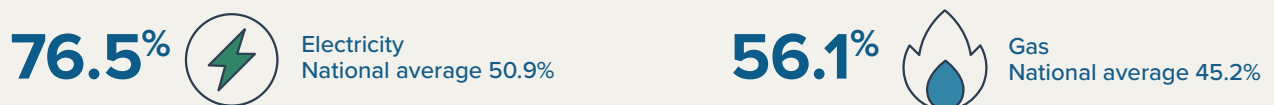
Average debt of hardship customers



Annual rate of hardship program success

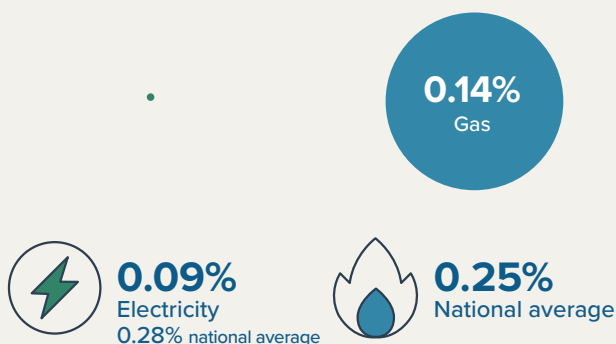


Hardship customers not meeting usage costs

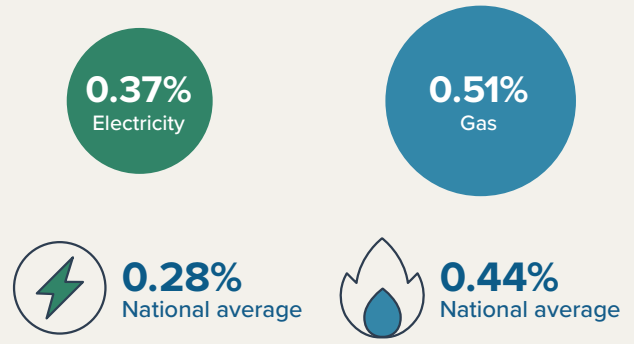


Annual disconnections

Residential



Small business



Customer numbers

as at 30 June 2025

Residential

1,486,942

Electricity

803,407

Gas



21.3%

Market share



34.3%

Market share

Small business



127,345

Electricity
19.4% market share



15,914

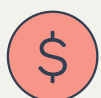
Gas
21.5% market share

Customer debt

(excludes hardship customers)

as at 30 June 2025

Residential



3.4%

of customers
in debt



\$968

average
energy debt



3.1%

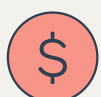
National average



\$1,367

National average

Small business



4.3%

of customers
in debt



\$1,563

average
energy debt



3.5%

National average



\$2,516

National average

Residential payment plans

as at 30 June 2025

Electricity



27,152

1.8% of customers



1.5%

National average

Gas



8,200

1.0% of customers



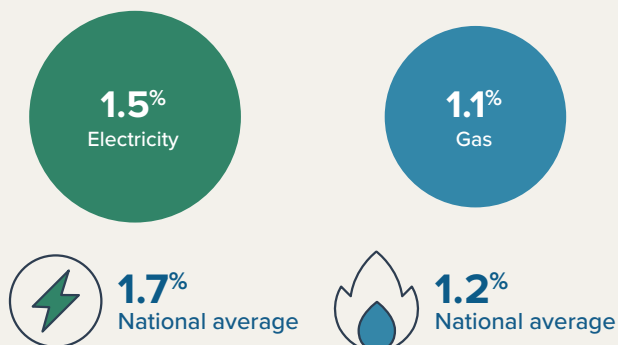
1.1%

National average

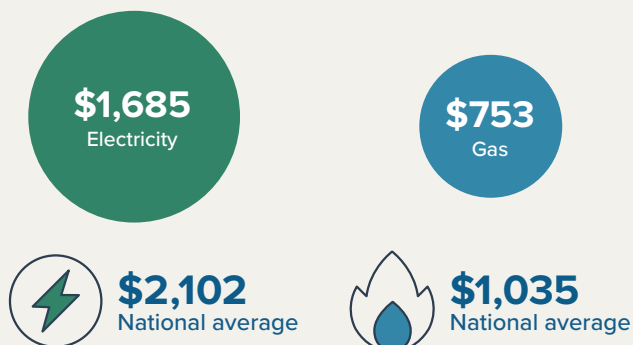
Residential hardship

as at 30 June 2025

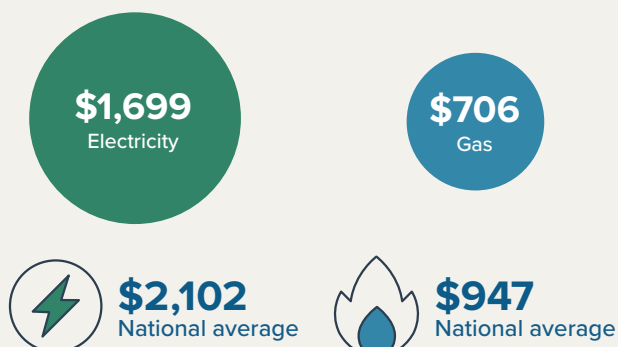
Customers on hardship programs



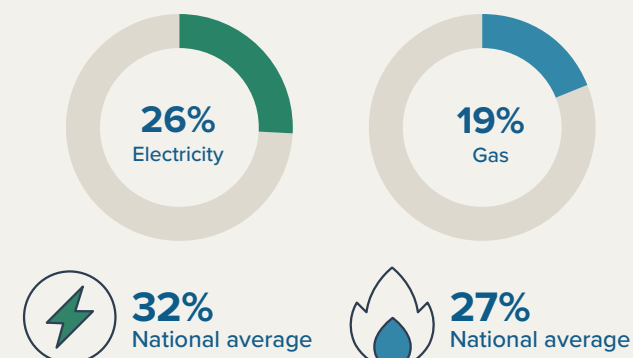
Average hardship customer debt on entry



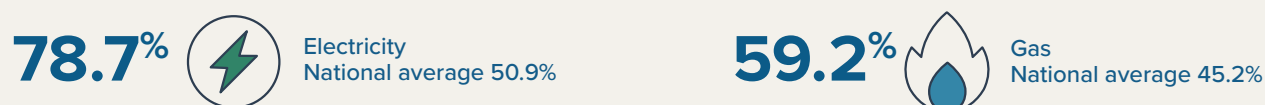
Average debt of hardship customers



Annual rate of hardship program success

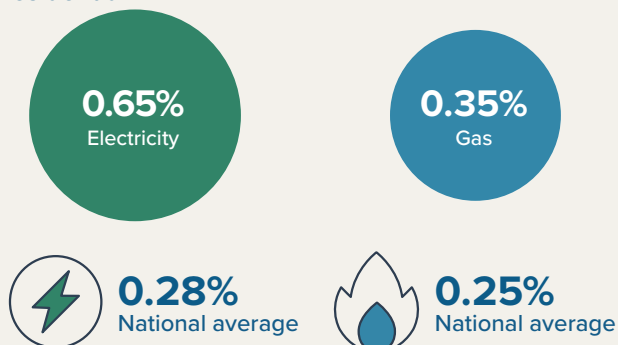


Hardship customers not meeting usage costs

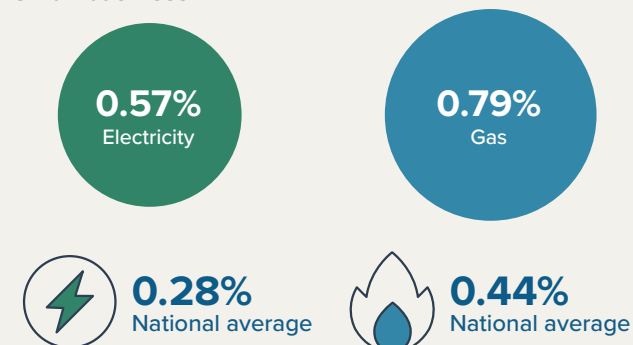


Annual disconnections

Residential



Small business



Alinta Energy

QLD, NSW, SA

Customer numbers

as at 30 June 2025

Residential

313,344

Electricity



4.5%

Market share



79,629

Gas
3.4% market share

Small business



17,370

Electricity
2.6% market share



1,259

Gas
1.7% market share

Customer debt

(excludes hardship customers)

as at 30 June 2025

Residential



1.2%

of customers
in debt



\$1,510

average
energy debt



3.1%

National average



\$1,367

National average

Small business



1.2%

of customers
in debt



\$2,334

average
energy debt



3.5%

National average



\$2,516

National average

Residential payment plans

as at 30 June 2025

Electricity



2,728

0.9% of customers



1.5%

National average

Gas



615

0.8% of customers



1.1%

National average

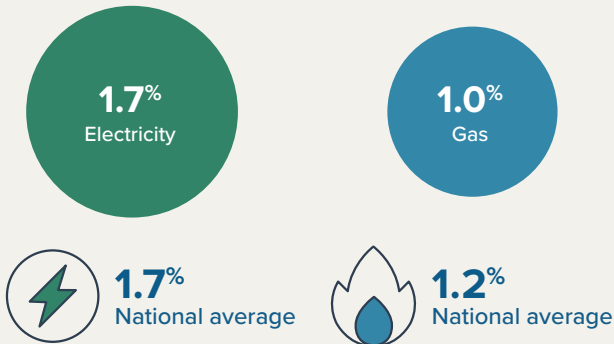
Alinta Energy

QLD, NSW, SA

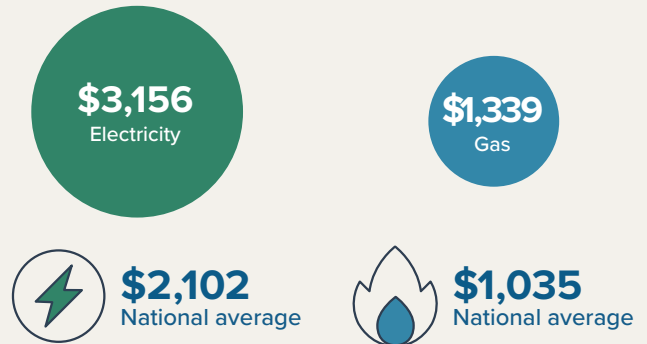
Residential hardship

as at 30 June 2025

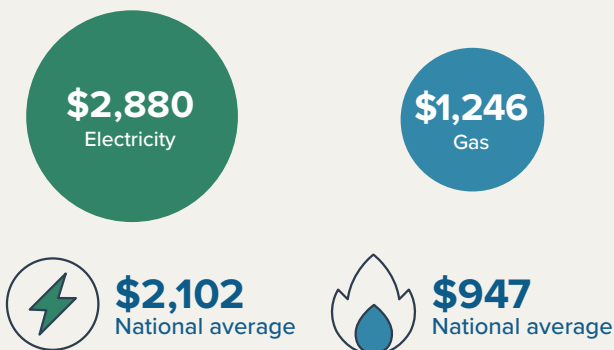
Customers on hardship programs



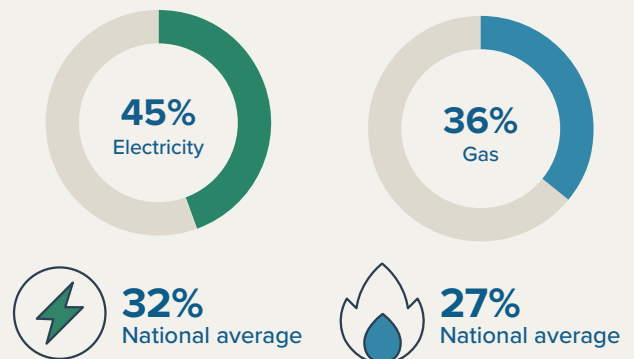
Average hardship customer debt on entry



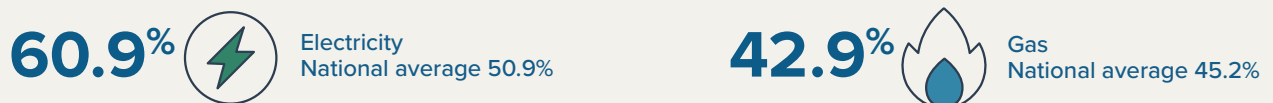
Average debt of hardship customers



Annual rate of hardship program success

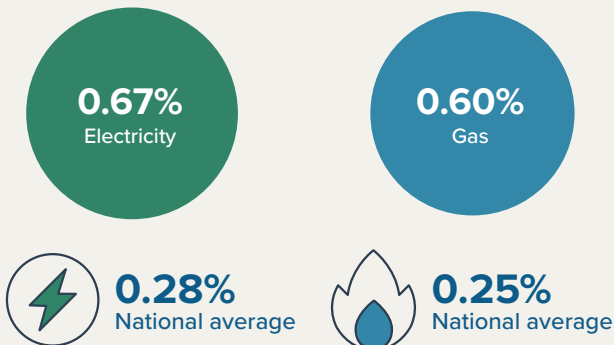


Hardship customers not meeting usage costs

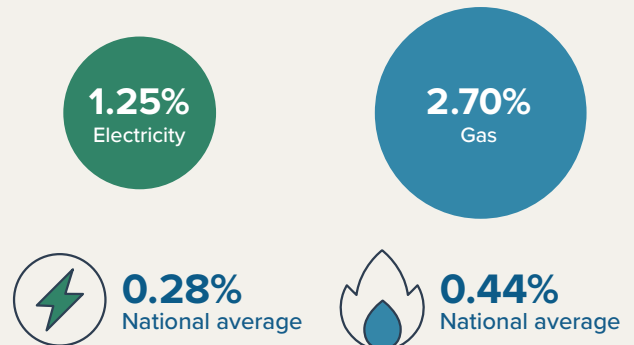


Annual disconnections

Residential



Small business



Aurora Energy

TAS

Customer numbers

as at 30 June 2025

Residential

239,466
Electricity



3.4%
Market share

Small business



33,284
Electricity
5.1% market share

Customer debt

(excludes hardship customers)

as at 30 June 2025

Residential



5.9%
of customers
in debt



\$701
average
energy debt



3.1%
National average



\$1,367
National average

Small business



1.2%
of customers
in debt



\$1,692
average
energy debt



3.5%
National average



\$2,516
National average

Residential payment plans

as at 30 June 2025

Electricity



2,623
1.1% of customers

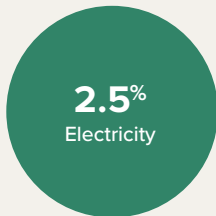


1.5%
National average

Residential hardship

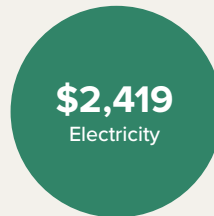
as at 30 June 2025

Customers on hardship programs



1.7%
National average

Average hardship customer debt on entry



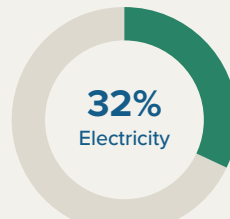
\$2,102
National average

Average debt of hardship customers



\$2,102
National average

Annual rate of hardship program success



32%
National average

Hardship customers not meeting usage costs

1.1%  Electricity
National average 50.9%

Annual disconnections

Residential



0.08%
Electricity
0.28% national average

Small business



0.07%
Electricity
0.28% national average

Customer numbers

as at 30 June 2025

Residential

75,153
Electricity



1.1%
Market share



26,676
Electricity
1.1% market share

Small business



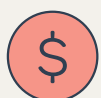
690
Electricity
0.1% market share

Customer debt

(excludes hardship customers)

as at 30 June 2025

Residential



13.5%
of customers
in debt



\$1,016
average
energy debt

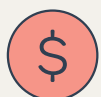


3.1%
National average



\$1,367
National average

Small business



9.9%
of customers
in debt



\$2,005
average
energy debt



3.5%
National average



\$2,516
National average

Residential payment plans

as at 30 June 2025

Electricity



3,055
4.1% of customers



1.5%
National average

Gas



688
2.6% of customers

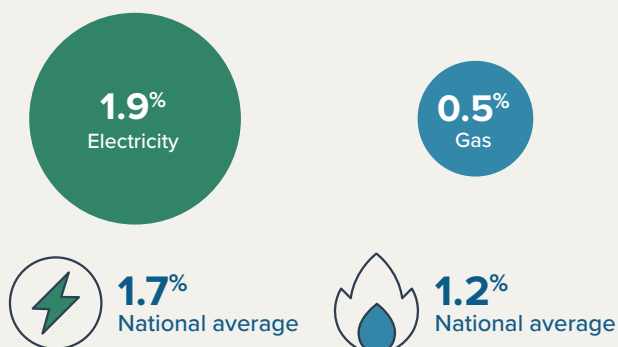


1.1%
National average

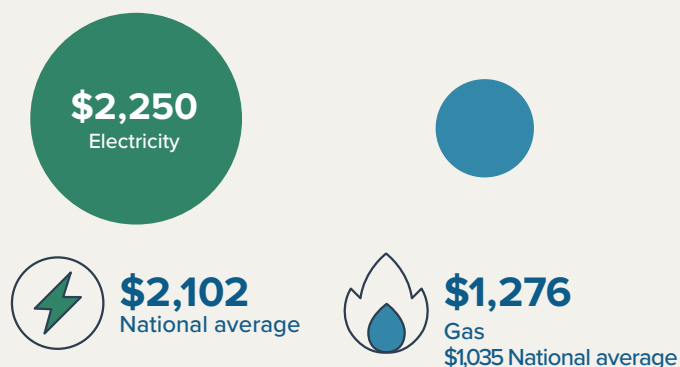
Residential hardship

as at 30 June 2025

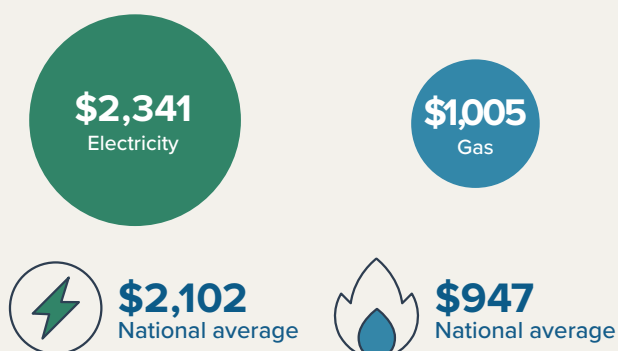
Customers on hardship programs



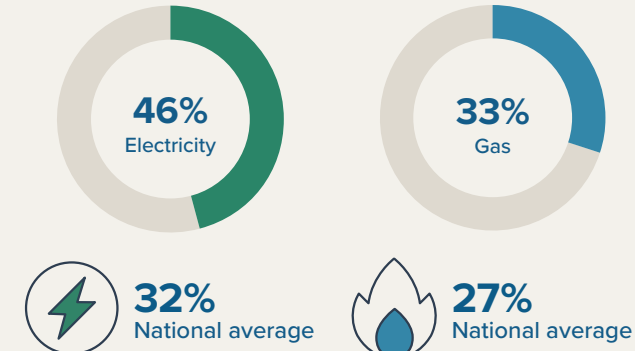
Average hardship customer debt on entry



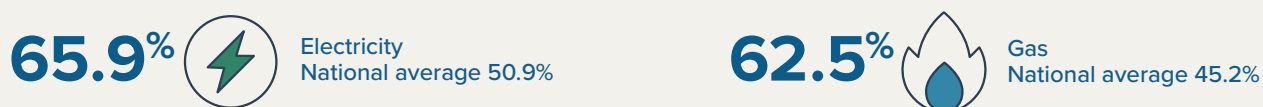
Average debt of hardship customers



Annual rate of hardship program success

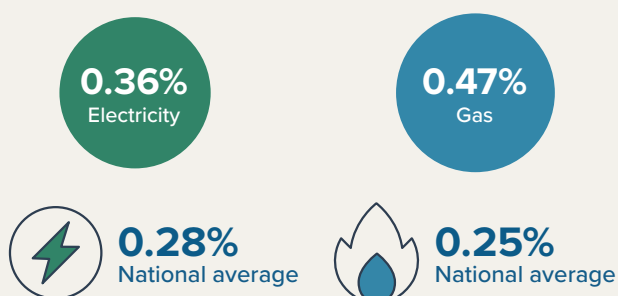


Hardship customers not meeting usage costs

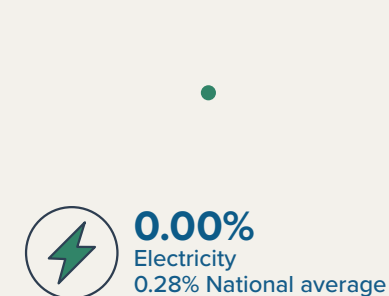


Annual disconnections

Residential



Small business



Energy Locals

QLD, NSW, ACT, SA, TAS

Customer numbers

as at 30 June 2025

Residential

73,200
Electricity



1.0%
Market share



2,858
Gas
0.1% market share

Small business

7,255
Electricity



1.1%
Electricity
1.1% market share



16
Gas
0.0% market share

Customer debt

(excludes hardship customers)

as at 30 June 2025

Residential



1.2%
of customers
in debt



\$1,171
average
energy debt

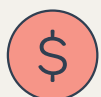


3.1%
National average



\$1,367
National average

Small business



1.7%
of customers
in debt



\$2,108
average
energy debt



3.5%
National average



\$2,516
National average

Residential payment plans

as at 30 June 2025

Electricity



491
0.7% of customers



1.5%
National average

Gas



2
0.1% of customers



1.1%
National average

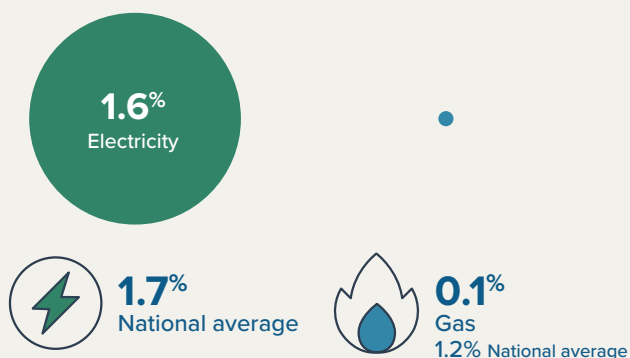
Energy Locals

QLD, NSW, ACT, SA, TAS

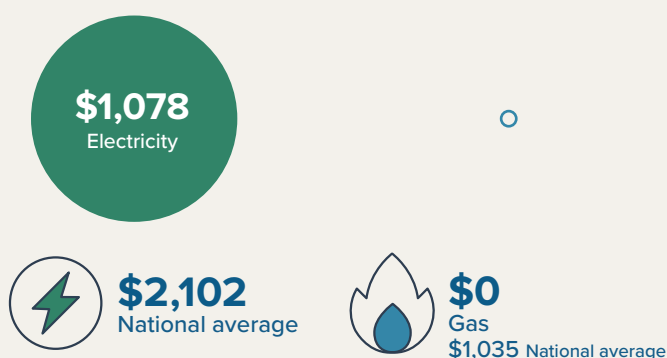
Residential hardship

as at 30 June 2025

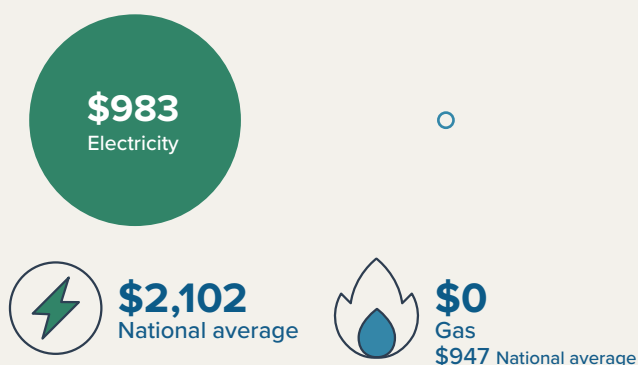
Customers on hardship programs



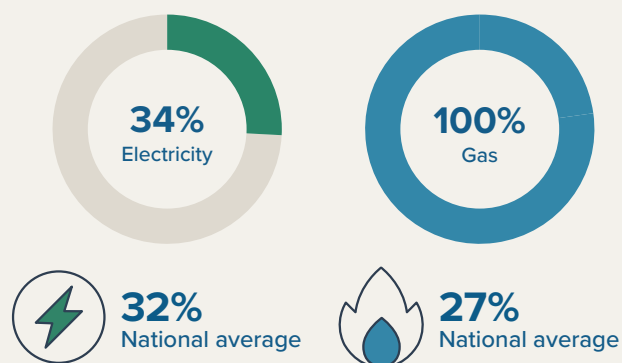
Average hardship customer debt on entry



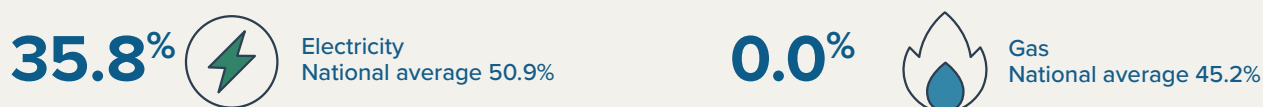
Average debt of hardship customers



Annual rate of hardship program success

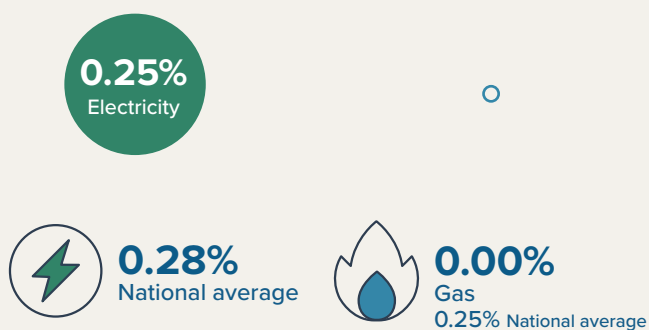


Hardship customers not meeting usage costs

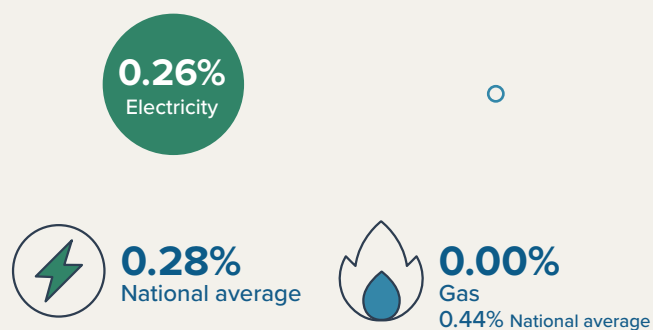


Annual disconnections

Residential



Small business



Energy Australia

QLD, NSW, ACT, SA

Customer numbers

as at 30 June 2025

Residential

911,588

Electricity

379,148

Gas



13.1%

Market share



16.2%

Market share

Small business



76,136

Electricity
11.6% market share



8,249

Gas
11.2% market share

Customer debt

(excludes hardship customers)

as at 30 June 2025

Residential



1.5%

of customers
in debt



\$1,367

average
energy debt



3.1%

National average



\$1,367

National average

Small business



1.9%

of customers
in debt



\$2,160

average
energy debt



3.5%

National average



\$2,516

National average

Residential payment plans

as at 30 June 2025

Electricity



9,740

1.1% of customers



1.5%

National average

Gas



4,923

1.3% of customers



1.1%

National average

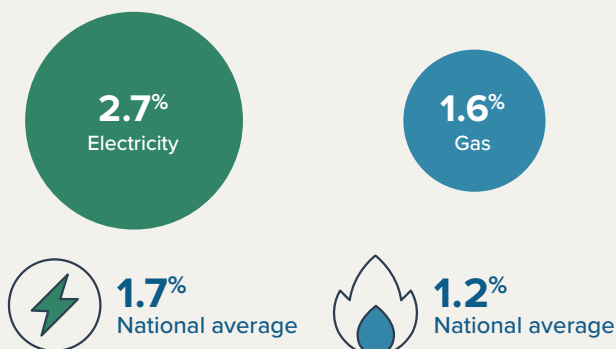
Energy Australia

QLD, NSW, ACT, SA

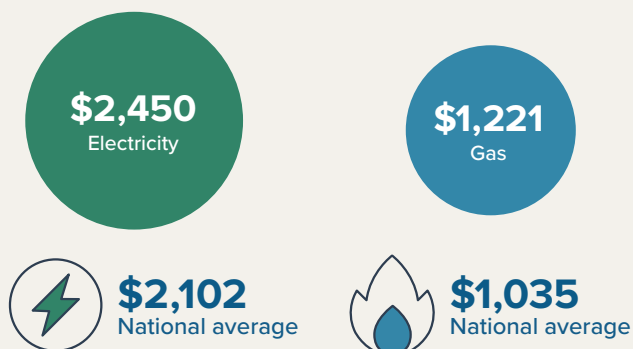
Residential hardship

as at 30 June 2025

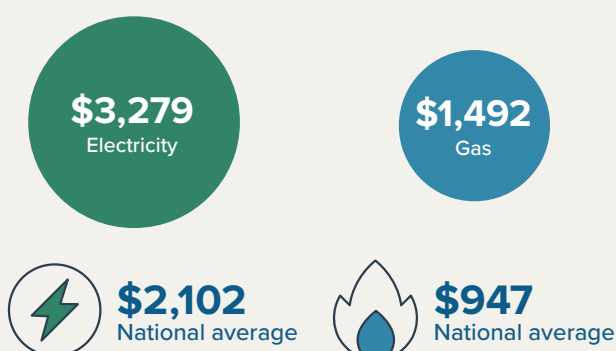
Customers on hardship programs



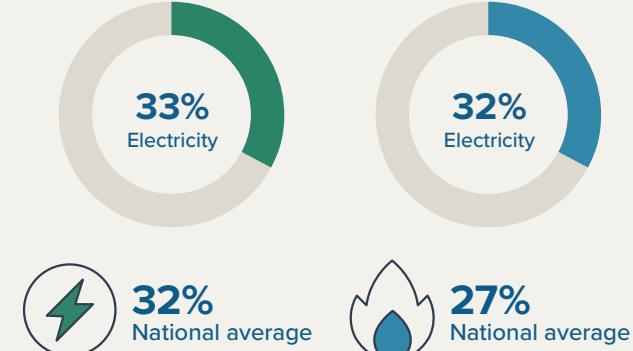
Average hardship customer debt on entry



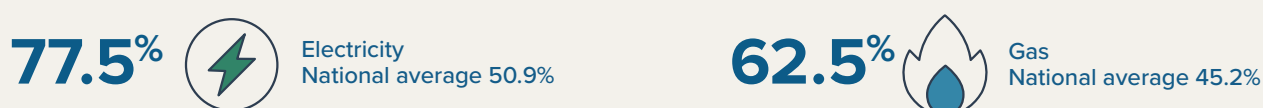
Average debt of hardship customers



Annual rate of hardship program success

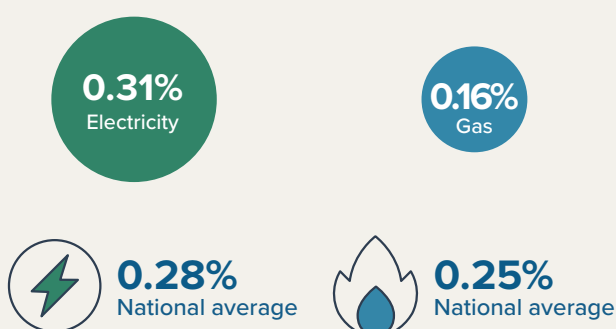


Hardship customers not meeting usage costs

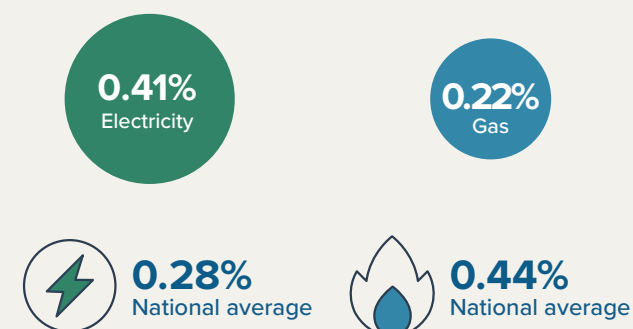


Annual disconnections

Residential



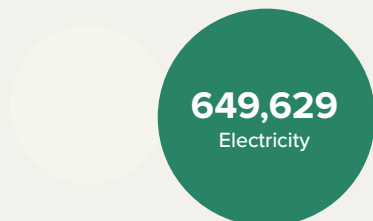
Small business



Customer numbers

as at 30 June 2025

Residential



9.3%
Market share

Small business



98,724
Electricity
15.0% market share

Customer debt

(excludes hardship customers)

as at 30 June 2025

Residential



3.0%
of customers
in debt



\$1,605
average
energy debt



3.1%
National average



\$1,367
National average

Small business



3.8%
of customers
in debt



\$2,134
average
energy debt



3.5%
National average



\$2,516
National average

Residential payment plans

as at 30 June 2025

Electricity



12,434
1.9% of customers

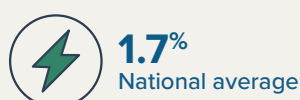
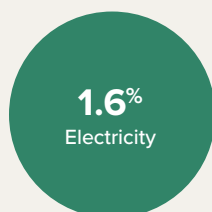


1.5%
National average

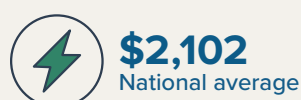
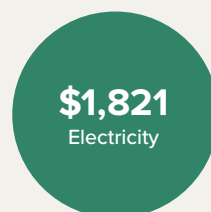
Residential hardship

as at 30 June 2025

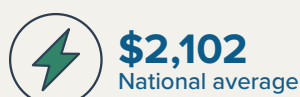
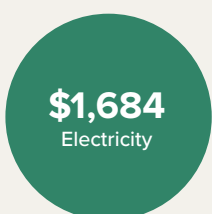
Customers on hardship programs



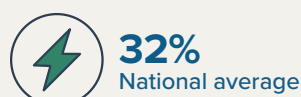
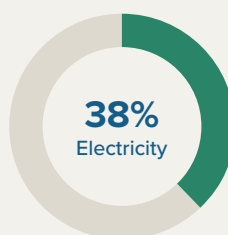
Average hardship customer debt on entry



Average debt of hardship customers



Annual rate of hardship program success

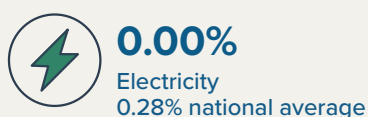


Hardship customers not meeting usage costs

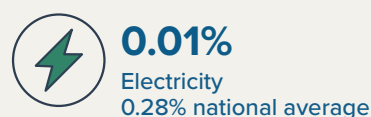


Annual disconnections

Residential



Small business



Origin Energy

QLD, NSW, ACT, SA

Customer numbers

as at 30 June 2025

Residential

1,848,188

Electricity

610,441

Gas



26.5%

Market share



26.0%

Market share

Small business



171,972

Electricity
26.2% market share



40,454

Gas
54.8% market share

Customer debt

(excludes hardship customers)

as at 30 June 2025

Residential



3.3%

of customers
in debt



\$1,944

average
energy debt



3.1%

National average



\$1,367

National average

Small business



3.8%

of customers
in debt



\$3,267

average
energy debt



3.5%

National average



\$2,516

National average

Residential payment plans

as at 30 June 2025

Electricity



26,459

1.4% of customers



1.5%

National average

Gas



6,701

1.1% of customers



1.1%

National average

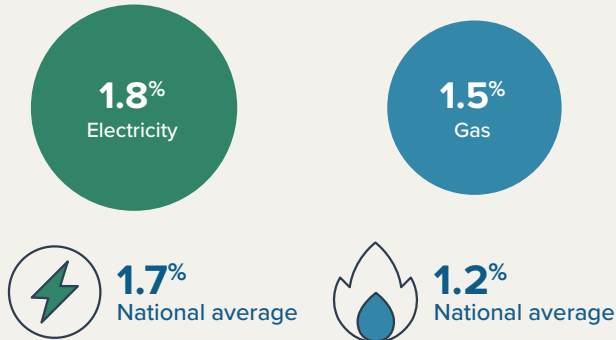
Origin Energy

QLD, NSW, ACT, SA

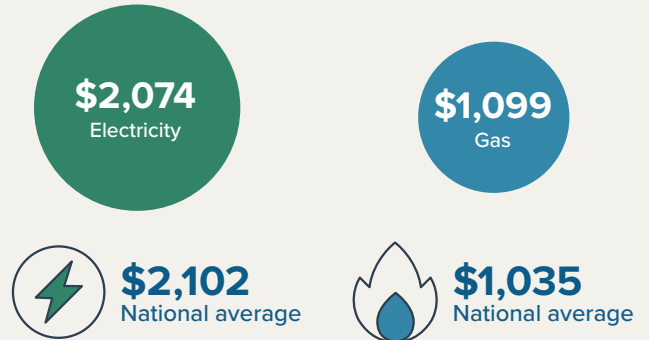
Residential hardship

as at 30 June 2025

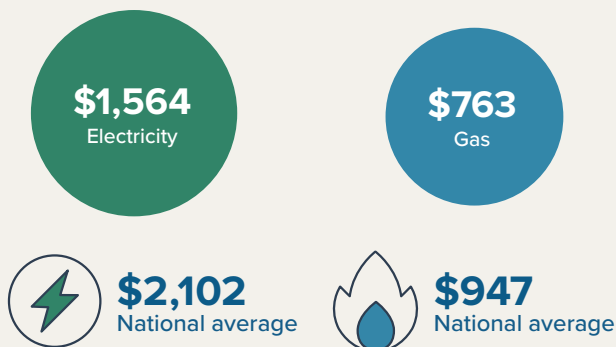
Customers on hardship programs



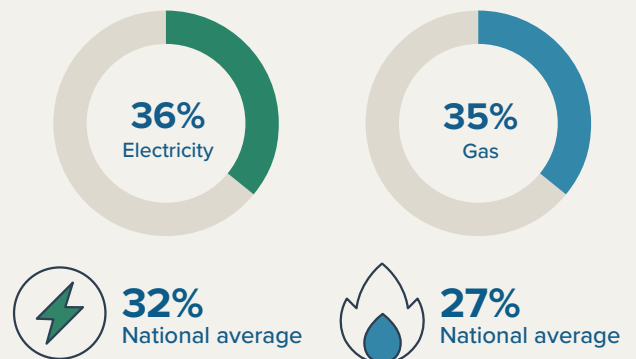
Average hardship customer debt on entry



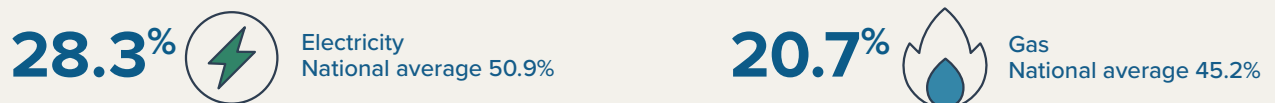
Average debt of hardship customers



Annual rate of hardship program success

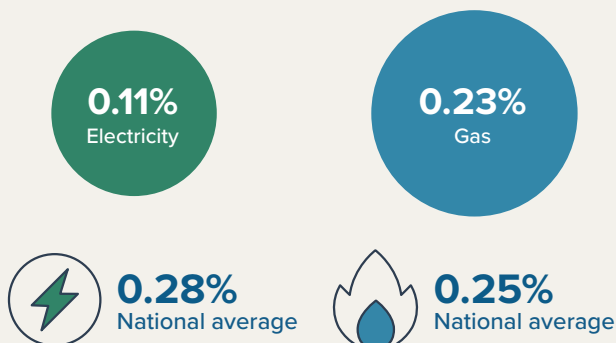


Hardship customers not meeting usage costs

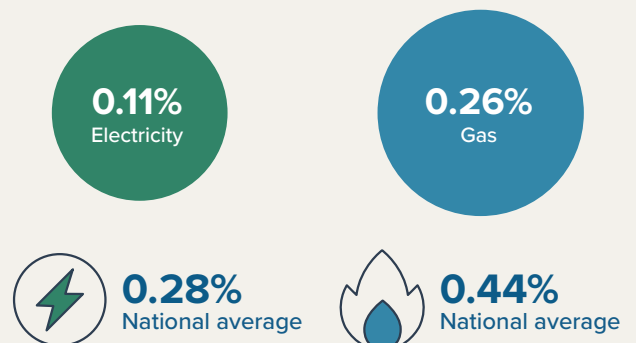


Annual disconnections

Residential



Small business



Powershop

QLD, NSW, SA

Customer numbers

as at 30 June 2025

Residential

66,615
Electricity



1.0%
Market share



14,310
Electricity
0.6 % market share

Small business



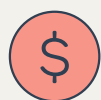
4,203
Electricity
0.6 % market share

Customer debt

(excludes hardship customers)

as at 30 June 2025

Residential



1.9%
of customers
in debt



\$2,666
average
energy debt



3.1%
National average



\$1,367
National average

Small business



2.0%
of customers
in debt



\$10,085
average
energy debt



3.5%
National average



\$2,516
National average

Residential payment plans

as at 30 June 2025

Electricity



312
0.5% of customers



1.5%
National average

Gas



24
0.2% of customers



1.1%
National average

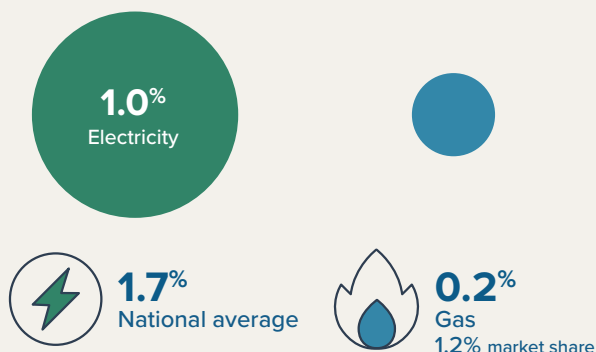
Powershop

QLD, NSW, SA

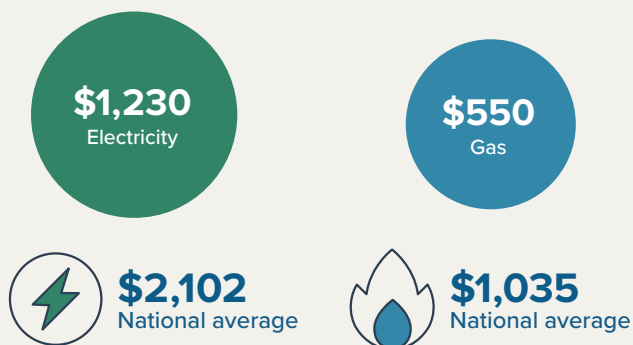
Residential hardship

as at 30 June 2025

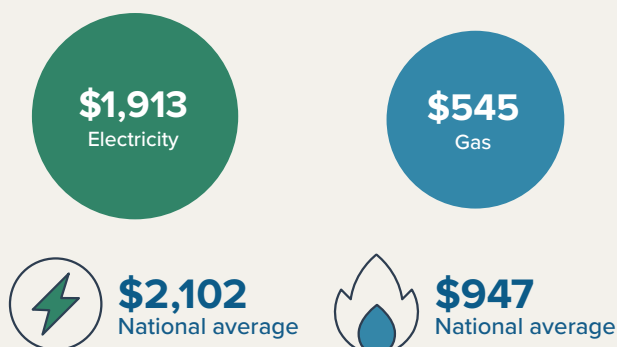
Customers on hardship programs



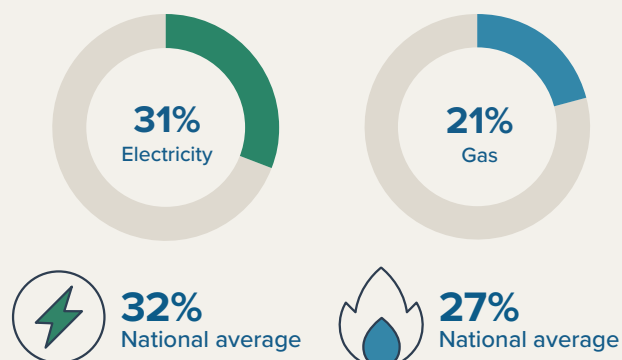
Average hardship customer debt on entry



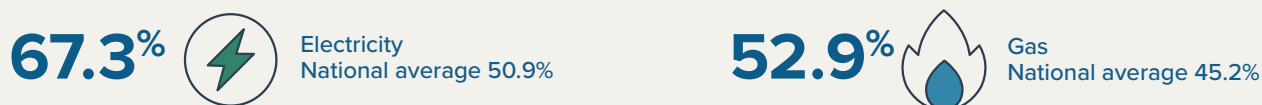
Average debt of hardship customers



Annual rate of hardship program success



Hardship customers not meeting usage costs

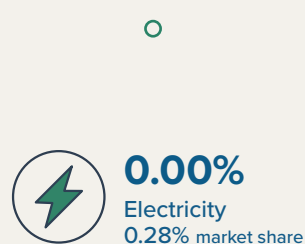


Annual disconnections

Residential



Small business



Red Energy

QLD, NSW, ACT, SA

Customer numbers

as at 30 June 2025

Residential

554,567
Electricity



8.0%
Market share



164,217
Gas
7.0% market share

Small business



31,642
Electricity
4.8% market share



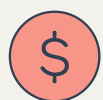
1,315
Gas
1.8% market share

Customer debt

(excludes hardship customers)

as at 30 June 2025

Residential



1.8%
of customers
in debt



\$1,137
average
energy debt



3.1%
National average



\$1,367
National average

Small business



1.7%
of customers
in debt



\$1,852
average
energy debt



3.5%
National average



\$2,516
National average

Residential payment plans

as at 30 June 2025

Electricity



11,288
2.0% of customers



1.5%
National average

Gas



2,357
1.4% of customers



1.1%
National average

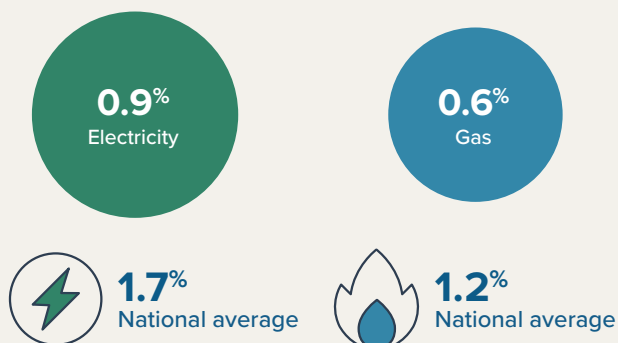
Red Energy

QLD, NSW, ACT, SA

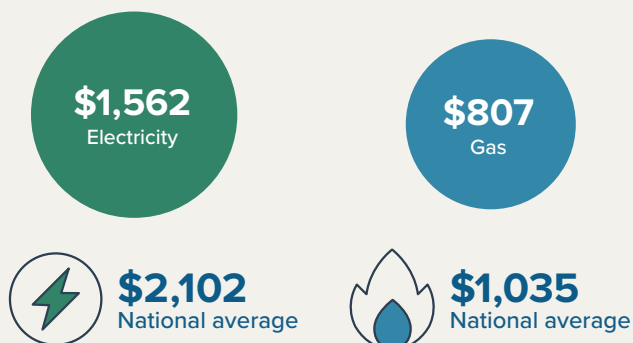
Residential hardship

as at 30 June 2025

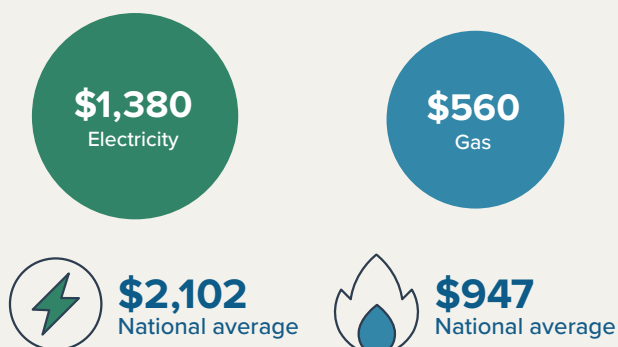
Customers on hardship programs



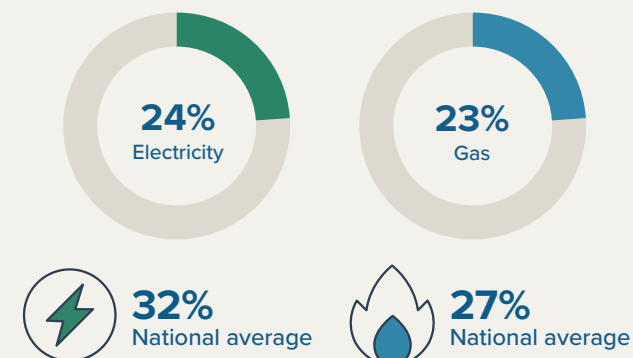
Average hardship customer debt on entry



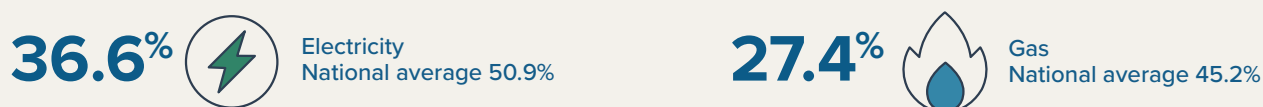
Average debt of hardship customers



Annual rate of hardship program success

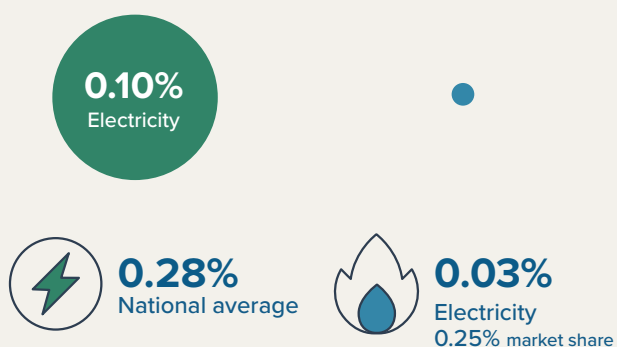


Hardship customers not meeting usage costs

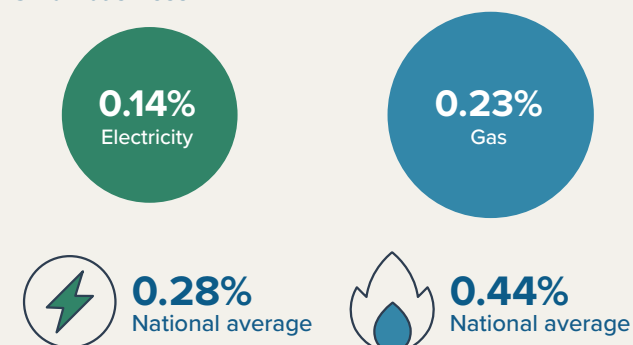


Annual disconnections

Residential



Small business



Customer numbers

as at 30 June 2025

Residential

137,730

Electricity

66,025

Gas



2.0%

Market share



2.8%

Market share

Small business



10,449

Electricity
1.6% market share



972

Gas
1.3% market share

Customer debt

(excludes hardship customers)

as at 30 June 2025

Residential



6.1%

of customers
in debt



\$2,235

average
energy debt



3.1%

National average



\$1,367

National average

Small business



10.6%

of customers
in debt



\$5,685

average
energy debt



3.5%

National average



\$2,516

National average

Residential payment plans

as at 30 June 2025

Electricity



2,078

1.5% of customers



1.5%

National average

Gas



705

1.1% of customers



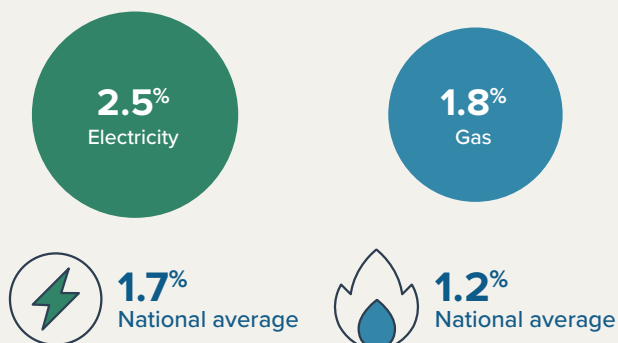
1.1%

National average

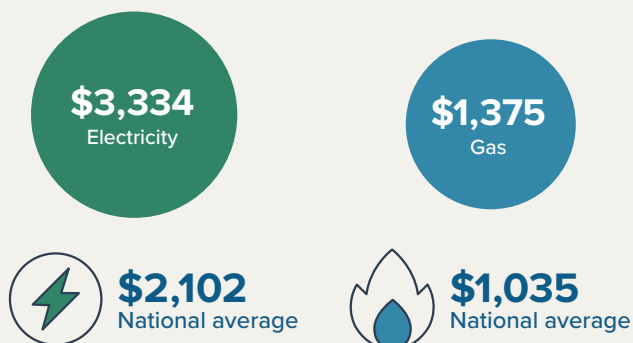
Residential hardship

as at 30 June 2025

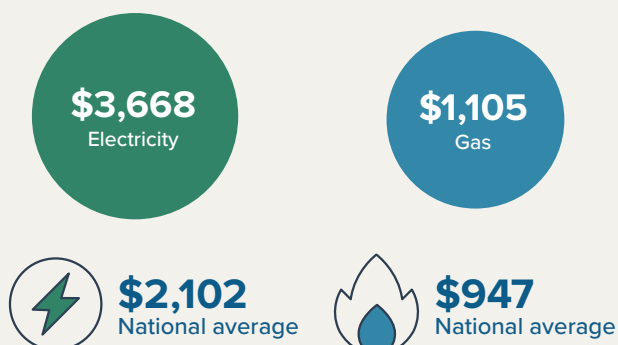
Customers on hardship programs



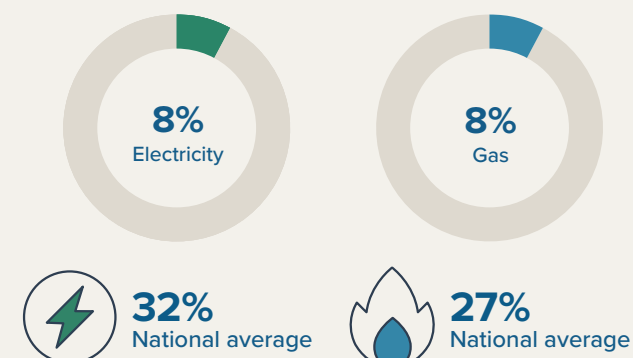
Average hardship customer debt on entry



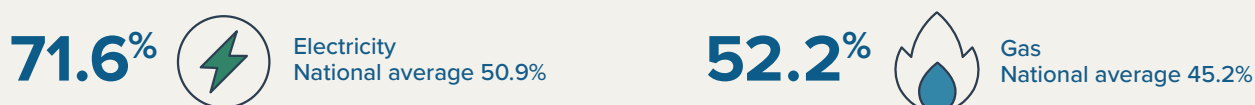
Average debt of hardship customers



Annual rate of hardship program success

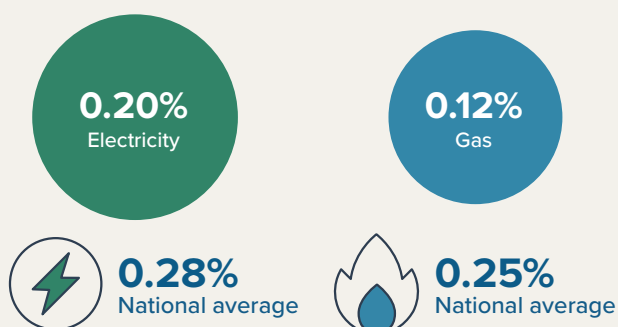


Hardship customers not meeting usage costs



Annual disconnections

Residential



Small business

