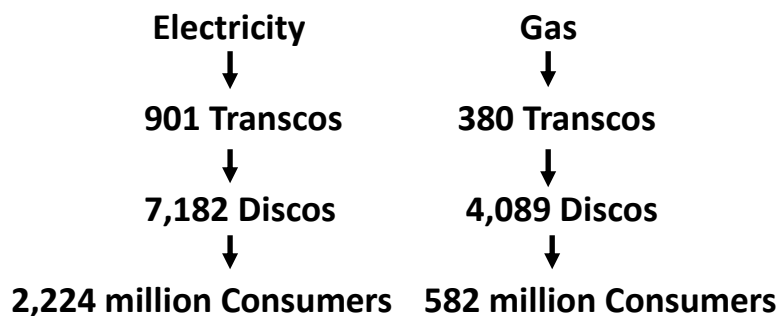


Global Electricity & Gas Utility Analysis & Forecasts Ed 2 2021

The purpose of this report is to provide a resource to quantify, segment and target the markets of utilities and their customers. The report provides analysis of the customer bases of global electricity and gas utilities with historical data forecast to 2030 by country, and snapshots of individual utility customer bases in 2019.

The data provides market analysis in tiers; Global, Regional, National, Utilities and drills down to the Customer Bases of individual Utilities. 10 regions and 211 countries.



- ◆ Locate and target market segments at different tiers and channel strategies can be developed to reach them.
- ◆ 901 electricity and 380 natural gas transmission utilities, 7,182 electricity and 4,089 natural gas distribution utilities, with 2,224 million electricity and 582 million gas customers analysed by country and utility.
- ◆ These databases can be used in two ways. You can use them to target utilities as primary end-customers, if you are selling products or services to the utilities directly, and you can prioritise the utilities by size, region and country. For example, you could identify the 38 electricity discos in the world with over 10 million customers, or the 316 with 1 million or more. You might be more interested in the 6,865 smaller electricity utilities with under 1 million customers. Or you could pick the 213 small utilities in South America, and drill down further by size or country.
- ◆ Or, you can segment the 2.8 billion customers of the utilities, by country and utility size. The databases have wider implications for other associated product fields. The discos supply power or gas and they are also channels to reach electricity and gas consumers for a multitude of other associated product offers. Many municipal discos have already developed ranges of products and services, some widely different from energy but carried via the channel of their energy supplies.
- ◆ Zero straight in on your prime targets. Some products or services involve high investment and are designed for large utilities. Many more are in the intermediate or small range. Whichever category you are in, this database provides a basic marketing resource to segment and target your market.

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Electricity Utilities

The **electricity utility** data is analysed globally, by 10 regions and 207 countries.

Country	Total electricity connections	Customers in DSOs with data	Number of Electricity Transcos	Number of Electricity DSOs
Europe				
CIS				
Middle East				
North Africa				
Sub-Saharan Africa				
Asia				
Pacific				
North America				
South America				
Central America				
World	2,224 million	2,058 million	901	7,182

This electricity database has some surprises and without the information opportunities could be missed and wrong directions taken. For example, in the addressable markets of electricity utilities Europe and North America have 76% of the world's DSOs, with only 11% of the largest companies but 77% of the smallest. In contrast, Asia has only 4% of the total number, but 87% of the largest utilities. South America has only 3.6% of the total, but 16% of the mid-size.

The database has many such comparisons, which demonstrates its value as a targeting resource.

Example of customer data entry for electricity utilities

Country	Electricity TSOs	Electricity DSOs	Total electricity connections	DSOs' customer base	Number of Electricity Transcos	Number of Electricity DSOs
Libya	GECOL		1,226,000		1	
		GECOL		1,226,000		1
Morocco	L'ONEE		11,700,000		1	
		L'ONEE		6,084,000		11
		LYDEC Casablanca		1,160,000		
		RADEEMA Marakesh		619,000		
		RADEES Safi		50,000		
		RADEEC Settat		98,603		
		RADEEJ El Jadida		77,472		
		REDAL Rabat (Veolia)		583,002		
World			2,070 million		916	7,182

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Gas Utilities

The **gas utility** data is analysed globally, by 10 regions and 207 countries. However, whereas grid electricity is almost universal, albeit limited in the smallest countries, piped gas is supplied in only 84 countries. Most countries have tanked or cylinder LPG, often widely available.

Country	Total gas connections	Customers in DSOs with data	Number of gas Transcos	Number of gas DSOs
Europe				
CIS				
Middle East				
North Africa				
Sub-Saharan Africa				
Asia				
Pacific				
North America				
South America				
Central America				
World	582 million	479 million	380	4,089

The composition of the gas utility population is different from electricity utilities, in that it has fewer very large utilities and more mid-sized, reflecting the more concentrated asset base of the gas sector. The database will give you the resource to locate and navigate the gas utility sector.

Country	Natural gas TSOs	Natural gas DSOs	Total gas connections	DSOs with customer data	Number of Gas Transcos	Number of Gas DSOs
Bangladesh	Gas Transmission Co Ltd GTCL		3,900,000		1	
		Titas Gas Transmission & Distribution Co TGTDCCL		2,783,134		6
		Karnaphuli Gas Distribution Co KGDCL		512,431		
		Bakhrabad Gas Distribution Co BGDCL		241,078		
		Jalalabad Gas Transmission and Distribution System Ltd JGTDSL		223,668		
		Pashchimanchal Gas Company Limited PGCL		128,338		
		Sundarbans Gas Co SGCL		3,093		
Pakistan	All Pakistan		9,211,437			
	Sui Northern Gas Pipelines Co Ltd SNGC				1	
		Sui Northern Gas Pipelines Co Ltd SNGC		6,296,000		1
	Sui Southern Gas Co Ltd SSGC				1	
		Sui Southern Gas Co Ltd SSGC		2,915,437		1
World			582million	479 million	380	4,089

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Information in the spreadsheets

	Geographical analysis			Timeframe			Format		
	Country	Region	World	Time frame	Historical	Snapshot	Forecasts	Tables	Chart
Population									
Population	√	√	√	1900-2050	√		√		
Households size	√	√	√	1900-2050	√		√	√	√
No of households	√	√	√	1900-2050	√		√	√	
National electricity									
Electrification %	√	√	√	1900-2050	√		√	√	
No of households with electricity	√	√	√	1900-2050	√		√	√	
World generating capacity by fuel, GW		√	√	1990-2025	√		√	√	√
T&D cumulative & demand km	√	√	√	1990-2020	√		√	√	√
The Electrification Wheel			√			√			√
Electrical utilities									
Numbers of electricity customers by country	√	√	√	1990-2030	√		√	√	
Summary electrical utility customer analysis		√	√	2019		√		√	√
Electrical utility size analysis	√	√	√	2019		√		√	
T&D utility customers by no & country	√			2019		√		√	
National gas									
Gasification %	√	√	√	1900-2050	√		√	√	
No of households with piped gas	√	√	√	1900-2050	√		√	√	
Evolution of city gas, natural gas , LPG	Selected			1900-2020	√				√
Gas type by year of launch	√			1816-2020	√			√	
Gas utilities									
Numbers of gas customers by country	√	√	√	1990-2030	√		√	√	
Summary gas utility customer analysis		√	√	2019		√		√	√
Gas utility size analysis	√	√	√	2019		√		√	
T&D utility customers by no & country	√			2019		√		√	
Piped water									
Piped water % & households	√	√	√	1990-2016	√			√	
Utility services									
Comparison of 3 utility services			√	1900-2020	√		√	√	√

21 Excel spreadsheets

Methodology

This report is based on a series of databases created in stages by StatPlan over 20 years - Population, Households, Electrification and Gasification, Utilities, Utility Customers. The demographic databases contain figures from 1900 to 2020, forecast to 2050, for 211 countries, national customer forecasts to 2030, and individual utility customers are recorded for the latest year. Forecasts are derived from new installations and replacements at the end of service life. The databases are updated continuously. The world is now in a stage of development where many countries are declining in population, but because household size is shrinking, numbers of households and consumers based on growing electrification and gasification are increasing. The population data is available from public records. Household data is not so readily available and has partly been constructed from household size, which has been assembled from many different sources. Utility and customer data has been gathered from national and utility reports involving hundreds of hours of research over many years, accessing records from official agencies and utilities in every country.

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