

HOUSEHOLDS ARE PAYING THE PRICE OF EUROPE'S FOSSIL FUEL DEPENDENCE

What the 2026 energy-price shock is already costing households¹

Europe's fossil-fuel dependence is still raising the cost of energy used in homes. For March–August 2026, a comparable basket of household gas, electricity, heating fuels and heat would cost an estimated €61.5 billion more at 2026 prices than at 2021 prices. Looking only at the latest price change, higher retail prices added an estimated €5.35 billion to household-energy costs compared with the same months in 2025, at modelled quantities.²

The direct rise in household gas costs was small during these summer-heavy months, but that does not mean gas has ceased to matter. Most household gas is used for heating, and gas-fired power plants can also influence wholesale electricity prices. The exposure matters for affordability: 8.8% of the EU population could not keep their home adequately warm in 2025, compared with 6.9% in 2021.³

Past price shocks show how such pressures accumulate. Across 2022–23, the estimated household-energy price burden relative to 2021 prices reached €208.6 billion.⁴ The EU fossil-sector solidarity contribution and equivalent national measures collected €26.15 billion during those years, according to the European Commission.⁵

Finally, transport fuels add a further source of exposure: higher prices for fuels used in private vehicles increased estimated costs by €30.13 billion in March–August 2026 compared with the same months in 2025.⁶

¹ Headline monetary estimates cover household energy and fuels used in private vehicles. Historical transport comparisons hold a fixed reference fuel quantity and change prices only.

² Author calculations based on Eurostat: [Household final consumption expenditure by purpose \(nama_10_cp18\)](#); [Quarterly national-accounts household consumption expenditure \(namq_10_gdp\)](#); [Monthly HICP \(prc_hicp_minr\)](#); [HICP item weights \(prc_hicp_iw\)](#); [Household energy use by end use \(nrg_d_hhq\)](#); and [Heating and cooling degree days \(nrg_chdd_m\)](#). (Accessed 1 October 2026)

³ Eurostat, [Disaggregated final energy consumption in households \(nrg_d_hhq\)](#) (Accessed 1 October 2026); European Commission, “[EU energy markets: evolving gas-electricity price linkages in a more volatile system](#)”, 21 May 2026; European Commission, “[Energy poverty](#)” (Accessed 1 October 2026); Eurostat, [Inability to keep home adequately warm \(ilc_mdcs01\)](#) (Accessed 1 October 2026).

⁴ Author calculations based on Eurostat, [Household final consumption expenditure and matching implicit price deflator \(nama_10_cp18\)](#) (Accessed 1 October 2026).

⁵ European Commission, “[Commission final report: Emergency measure on the fossil fuels sector in support of European consumers and businesses](#)”, 15 May 2025.

⁶ Author calculations based on Eurostat [Household final consumption expenditure \(nama_10_cp18\)](#), [Quarterly national-accounts household consumption expenditure \(namq_10_gdp\)](#), [Monthly HICP \(prc_hicp_minr\)](#), and [HICP item weights \(prc_hicp_iw\)](#) (Accessed 1 October 2026).

At a glance

~€61.5bn

Estimated cost difference for a comparable basket of household gas, electricity and other home energy in March–August 2026 relative to 2021 prices; not observed additional expenditure.

~€5.35bn

Estimated extra cost of energy used in homes in March–August 2026 compared with the same months in 2025, holding modelled quantities constant.

~€1.63bn

Electricity's estimated contribution to the €5.35 billion increase in household-energy costs between March and August 2026 compared with 2025.

~€30.1bn

Estimated additional cost of petrol, diesel and other private motor fuels in March–August 2026 compared with the same months in 2025, holding the modelled reference fuel quantity constant. This is not observed additional spending.

1. Gas: Europe's exposure through household heating

Gas supplied 29.4% of EU household energy in 2024, more than any other individual source. Electricity provided 26.9%, renewables and biofuels 22.8%, oil and petroleum products 10.4%, and district heat 8.5%. Space heating accounted for 61.5% of household energy use, with water heating adding another 15.6%.⁷ This reliance on heating exposes homes to fossil-fuel price shocks.

International energy markets were disrupted again at the end of February 2026. The European Commission describes emergency measures introduced since then as responses to the Middle East conflict that began at that time.⁸

Across March–August 2026, the estimated household-energy cost increase reached €5.35 billion relative to the same months in 2025, holding modelled quantities constant. But direct changes in retail gas prices accounted for only around €0.06 billion net. This modest six-month gas figure is a result of seasonal use and the timing of monthly price changes, which are central to the result.⁹

⁷ Eurostat, [Disaggregated final energy consumption in households \(nrg_d_hhq\)](#) (accessed 1 October 2026).

⁸ European Commission, [Commission publishes overview of national emergency measures taken to protect consumers and industry](#), 20 May 2026.

⁹ Author calculations based on Eurostat: [Household final consumption expenditure \(nama_10_cp18\)](#); [Monthly HICP \(prc_hicp_minr\)](#); [HICP item weights \(prc_hicp_iw\)](#); [Household energy use by end use \(nrg_d_hhq\)](#); and [Heating and cooling degree days \(nrg_chdd_m\)](#) (Accessed 1 October 2026).

For wider context, the Commission estimated €62 billion in additional EU fossil-fuel import spending between March and July 2026; imported fossil fuels still provided 57% of the EU's energy.¹⁰ On 29 September, Energy Commissioner Dan Jørgensen said economy-wide additional energy spending exceeded €100 billion, without additional gas or oil quantities.¹¹

These economy-wide figures include industry, power generation and transport. They are not directly comparable with the modelled household costs analysed here.

2. Electricity: how gas prices can affect household energy bills

Electricity contributed an estimated €1.63 billion to the €5.35 billion increase in household-energy costs between March and August 2026 compared with the same months in 2025. Within this electricity component, higher electricity prices added an estimated €160 million to household space-cooling costs between March and August 2026. This estimate holds cooling demand constant and does not include extra electricity use caused by hotter weather.¹²

Gas-fired plants often influence the marginal wholesale electricity price, so a rise in gas costs can affect electricity market prices even when direct household gas consumption is low.¹³ Independent evidence identifies gas as a major driver of the 2026 wholesale electricity price shock. The International Energy Agency reports that disrupted LNG supplies raised gas-fired generation costs, while average EU spot wholesale electricity prices increased by more than 30% year-on-year in the second quarter of 2026.¹⁴

The European Environment Agency estimates that gas-price volatility added around €13 billion to the EU wholesale day-ahead electricity bill during the first 16 weeks of 2026, with average wholesale prices 13% higher than in a modelled stable-gas-price scenario.¹⁵

These wholesale-market estimates use different periods and counterfactuals from this report's March–August household retail price comparison. The €1.63 billion figure captures overall household electricity-price changes; this analysis cannot

¹⁰ European Commission, [“Accelerate EU to strengthen EU energy resilience” — key facts on fossil-fuel imports](#) (Accessed 1 October 2026).

¹¹ European Commission, Audiovisual Service, [doorstep statement by Energy Commissioner Dan Jørgensen](#), 29 September 2026

¹² Author calculations based on Eurostat [Household final consumption expenditure \(nama_10_cp18\)](#), [HICP item weights \(prc_hicp_iw\)](#), [Household energy use by end use \(nrg_d_hhq\)](#), [Heating and cooling degree days \(nrg_chdd_m\)](#), and [Monthly HICP \(prc_hicp_minr\)](#) (Accessed 1 October 2026).

¹³ European Commission, [“EU energy markets: evolving gas-electricity price linkages in a more volatile system,”](#) 21 May 2026.

¹⁴ IEA (2026), [Electricity Mid-Year Update 2026](#) (Accessed 1 October 2026).

¹⁵ European Environment Agency (2026), [“Renewable electricity: best buffer against gas price volatility,”](#) 02 July 2026.

isolate how much was attributable to gas. Other factors influencing electricity prices include renewable and nuclear generation, weather-related demand, carbon and fuel costs, and grid constraints. Retail contracts, network charges and taxes affect how wholesale prices reach households.

Other household heating fuels

Other direct contributions were €2.48 billion from home heating liquids, around €0.62 billion from heat energy and €0.57 billion from solid fuels.¹⁶ Prices for liquid household fuels rose particularly sharply. Eurostat's consumer-price index was about 27% higher than a year earlier in March, 47% higher in April and 42% higher in May, with increases remaining close to or above 30% for much of the summer.¹⁷ That pushed the estimated additional cost from household liquid fuels to almost €2.5 billion by August.

Household affordability: paying more while using less

The latest increase is hitting households after several years of unusually high energy costs. The Agency for the Cooperation of Energy Regulators (ACER) estimates that the average EU household spent around €1,170 on gas and €840 on electricity in 2025, although costs vary widely between countries and households. Fixed-price contracts also remain common: around 52% of household electricity customers were on fixed-term contracts, which can delay both increases and decreases in retail prices.¹⁸

Eurostat reports average EU household electricity prices of €28.96 per 100 kWh in the second half of 2025, with taxes and levies accounting for 28.9% of the final bill.¹⁹ Household gas averaged €12.28 per 100 kWh over the same period, with taxes and levies accounting for 31.0%.²⁰ This matters because wholesale energy costs are only one part of what households ultimately pay.

The longer-term price comparison points to enduring pressure on home-energy budgets: a comparable March–August basket of gas, electricity, heating fuels and heat would cost about €61.5 billion more at 2026 prices than at 2021 prices. This is a comparison of prices for a comparable basket, not an estimate of observed extra spending.²¹

¹⁶ Author calculations based on Eurostat: [Household final consumption expenditure \(nama_10_cp18\)](#); [Monthly HICP \(prc_hicp_minr\)](#); [HICP item weights \(prc_hicp_iw\)](#); [Household energy use by end use \(nrg_d_hhq\)](#); and [Heating and cooling degree days \(nrg_chdd_m\)](#) (Accessed 1 October 2026).

¹⁷ Author calculations from Eurostat [Monthly HICP \(prc_hicp_minr\)](#), EU-27 aggregate, ECOICOP v2 CP0453 (liquid fuels used in homes); percentages calculated year-on-year against the same months in 2025 (Accessed 1 October 2026).

¹⁸ ACER, [“High energy bills and fixed contracts continue to prevail in EU retail energy markets”](#), 24 July 2026.

¹⁹ Eurostat, [“EU household electricity prices stable in 2025”](#), 05 May 2026.

²⁰ Eurostat, [“EU household gas prices up in the second half of 2025”](#), 5 May 2026; see also Eurostat, [“Natural gas price statistics”](#) (nrg_pc_202), for the EU tax-and-levy share. (Accessed 1 October 2026).

²¹ Author calculations based on Eurostat [Household final consumption expenditure by purpose \(nama_10_cp18\)](#), [Quarterly national-accounts household consumption expenditure \(namq_10_gdp\)](#), [Monthly HICP \(prc_hicp_minr\)](#), and [HICP item weights \(prc_hicp_iw\)](#) (Accessed 1 October 2026).

Even 2021 is not a perfect low-price baseline. Eurostat reported that consumer prices for electricity, gas and other fuels in the euro area had already risen 25% between December 2020 and December 2021. Using 2021 as the benchmark may therefore understate the gap between current prices and the lower-price environment that existed before the energy crisis.²²

At the same time, households are using less energy. EU household energy use fell from 10.98 million terajoules in 2021 to 9.54 million in 2024, a decline of around 13%. Lower use cannot be attributed to prices alone: weather, energy-saving behaviour, efficiency improvements and changes in heating patterns can all affect demand.²³ Yet affordability has not returned to its 2021 position. The share of the EU population unable to keep their home adequately warm rose from 6.9% in 2021 to 10.6% in 2023, before falling to 9.2% in 2024 and 8.8% in 2025. This indicator captures one important dimension of energy poverty rather than every form of difficulty households may face in paying for energy.²⁴

Lessons from 2022-23: household costs and the public response

The earlier crisis imposed much larger price effects on energy used inside homes: approximately €95.1 billion in 2022 and €113.4 billion in 2023 relative to 2021 price levels, or €208.6 billion over the two years. Including motor fuels produces a broader estimated burden of €338.6 billion. The two components use different quantity assumptions, so the combined figure is a comparison of scale rather than a single observed expenditure series.²⁵

The EU responded to exceptional fossil-sector profits with a temporary solidarity contribution and equivalent national measures. Member States collected €26.15 billion for 2022 and 2023, according to the European Commission. That is around 7.7% of the estimated €338.6 billion combined household burden, roughly €1 for every €13 of additional costs. This is a comparison of scale, not a claim that households were reimbursed at that rate. The Commission says most proceeds were used to support energy consumers, particularly vulnerable households, while Member States could also use proceeds for other permitted measures.²⁶

Public budgets carried a much larger share of the crisis response. The Commission estimates that national measures to protect users from high energy prices amounted

²² Eurostat, [“Energy prices on the rise in the euro area in 2021”](#), 10 February 2022.

²³ Eurostat, [Disaggregated final energy consumption in households \(nrg_d_bhq\)](#) (Accessed 1 October 2026); see also [“Energy use in EU households drops for 3 years in a row”](#), 10 June 2026.

²⁴ European Commission, [“Energy poverty”](#), (Accessed 1 October 2026).

²⁵ Author calculations based on Eurostat [Household final consumption expenditure and its matching implicit price deflator \(nama_10_cp18\)](#) (Accessed 1 October 2026). Historical motor-fuel calculations additionally use Eurostat [Quarterly national-accounts household consumption expenditure \(namq_10_gdp\)](#), [Monthly HICP \(prc_hicp_minr\)](#), [HICP item weights \(prc_hicp_iw\)](#), and [Household final consumption expenditure by purpose \(nama_10_cp18\)](#) (Accessed 1 October 2026).

²⁶ European Commission, [“Commission final report: Emergency measure on the fossil fuels sector in support of European consumers and businesses”](#), 15 May 2025.

to €187 billion in 2022 and €145 billion in 2023. Households were the largest direct beneficiaries, receiving €121 billion across 2021–23.²⁷

3. Transport: motor fuels and the wider cost of fossil-fuel dependence

Transport creates a further, separate exposure to fossil-fuel price shocks. The estimated additional cost of petrol, diesel and other private motor fuels was €30.13 billion in March–August 2026 compared with 2025 prices, using a modelled reference spending basket; compared with 2021 prices, the motor-fuel component was €49.7 billion. Together with household energy, the broader price-basket comparison with 2021 totals around €111.2 billion, while the combined 2026-versus-2025 increase is €35.48 billion. In 2024, transport accounted for roughly one-third of EU final energy use, 90.1% of road-transport energy came from diesel and petrol combined, and EU import dependency for crude oil was 96.6%. These are modelled price effects, not observed changes in actual spending.²⁸

Briefing by Dr. Mehmet Börühan Bulut, commissioned by Greenpeace Belgium.

For more information, contact

Dr Eszter Matyas

Energy campaigner, Greenpeace Central and Eastern Europe
eszter.matyas@greenpeace.org

Manon Laudy

Press officer, European energy campaign, Greenpeace Belgium
manon.laudy@greenpeace.org

Colophon: Households Are Paying The Price Of Europe's Fossil Fuel Dependence

Publication date: October 2026; Author: Dr. Mehmet Börühan Bulut; Reviewer: Dr Eszter Matyas; Greenpeace Belgium takes full responsibility for this publication.

Greenpeace is an independent global network that campaigns and takes action to change people's opinions and behavior, protect and preserve the environment, and promote peace.

²⁷ European Commission, "[Energy subsidies report shows progress in 2023](#)", 29 January 2025.

²⁸ Eurostat, "[Energy in Europe – 2026 edition](#)" (2024 final energy consumption by sector) (Accessed 1 October 2026); Eurostat, "[Oil and petroleum products – a statistical overview](#)" (2024 road-transport fuel mix and oil import dependency) (Accessed 1 October 2026).

Methodology

Scope

Household energy covers electricity, gas, liquid and solid fuels used in the home, and heat energy. Transport covers petrol, diesel and other fuels and lubricants used in private vehicles; vehicle purchases, repairs, insurance, public transport and air fares are excluded.²⁹

How the estimates are built

No single EU dataset tracks monthly household spending across all of these categories. The household-energy model therefore combines Eurostat expenditure, consumer-price, energy-use and weather data. It starts from €427.9 billion of 2024 expenditure, updates it to 2025 prices, allocates spending by fuel and season, and applies monthly 2025–26 price changes. The estimates depend on the reference expenditure levels and seasonal allocation assumptions.³⁰

Motor fuels are modelled separately because Eurostat does not publish a directly observed monthly EU household-spending series for this category. We derive a 2025 reference spending level from household consumption, the transport share of spending and consumer-price weights, then apply monthly motor-fuel price changes. Historical comparisons hold the reference fuel quantity constant and reprice it at 2021, 2022, 2023 and 2026 prices.³¹

Historical comparisons

For household energy, historical comparisons revalue the quantities used in each period at 2021 prices. Because transport instead uses a fixed reference quantity, the combined historical totals are best read as comparisons of scale rather than as a single observed expenditure series.³²

Limitations

All headline figures estimate price effects, not observed household losses. Actual expenditure also depends on weather, efficiency, behaviour, kilometres driven and fuel consumption. Motor-fuel estimates are more uncertain because the reference spending baseline is modelled. Not all retail price changes since March 2026 can be attributed to the Middle East conflict. Estimates end in August 2026; 2021 is a pre-invasion benchmark, not a pure low-price baseline, because energy prices were already rising that year.³³

²⁹ UN Statistics Division, COICOP 2018, [group 04.5 “Electricity, gas and other fuels”](#) and [class 07.2.2 “Fuels and lubricants for personal transport equipment”](#) (scope and exclusions) (Accessed 1 October 2026).

³⁰ Author calculations based on Eurostat: [Household final consumption expenditure \(nama_10_cp18\)](#); [Monthly HICP \(prc_hicp_minr\)](#); [HICP item weights \(prc_hicp_iw\)](#); [Household energy use by end use \(nrg_d_hhq\)](#); and [Heating and cooling degree days \(nrg_chdd_m\)](#) (Accessed 1 October 2026).

³¹ Author calculations based on Eurostat: [Household final consumption expenditure by purpose \(nama_10_cp18\)](#); [Quarterly national-accounts household consumption expenditure \(namq_10_gdp\)](#); [Monthly HICP \(prc_hicp_minr\)](#); and [HICP item weights \(prc_hicp_iw\)](#) (Accessed 1 October 2026).

³² Author calculations based on Eurostat: [Household final consumption expenditure and implicit price deflator \(nama_10_cp18\)](#); [Quarterly national-accounts household consumption expenditure \(namq_10_gdp\)](#); [Monthly HICP \(prc_hicp_minr\)](#); and [HICP item weights \(prc_hicp_iw\)](#) (Accessed 1 October 2026).

³³ Eurostat, [“Energy prices on the rise in the euro area in 2021”](#), 10 February 2022.