

Algeria Power Report 2015

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Abstracts

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BMI View: Algeria has ambitious investment programme over 2015-2024, which will be driving strong gas generation growth. Historically strong gas-fired generation growth rates are supportive of further steady capacity growth, additionally the political situation is relatively stable and Algeria brought a sizeable 460MW Biskra gas plant online ahead of schedule last year. BMI considers these to be positive signs to spur the gas capacity growth.

Algerian state-owned incumbent Sonulgaz is aiming to build nearly 28GW of new capacity by 2025. The utility claims that 15.4GW of this capacity has already been allocated and over the next three years 14.2GW of new capacity will come online, most of which will be gas-fired. BMI has a fairly bullish view on this capacity coming online. Despite lower oil and gas prices, which are detrimental to the revenues that the Algerian state will be receiving, BMI's Country Risk team believes the Algerian GDP will 3.4% CAGR on average over 2015-2019. As another positive sign. Sonulgaz brought the fairly sizable 460MW Biskra gasfired plant online early. BMI also believes that domestically available gas will help utilities cut the feedstock prices and make it cheaper to develop new gas-fired generation. As a result, BMI believes gasfired generation will increase over 2015-2024, sidelining renewable generation growth.

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