

Cambodia Power Report Q4 2012

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Abstracts

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BMI View:

The major players in Asian power supply are clamouring to invest in Cambodia, with the result that huge capacity expansion can be expected from around 2015, as hydro, gas and coal-based schemes are introduced. This should leave the country with plentiful spare generation, even if annual electricity consumption grows at an average rate of 13.2% per annum over our 10-year forecast period to 2021. Neighbouring Vietnam, which will finance a number of power projects, plans to make good use of Cambodia's potential export capability, as does Thailand if a major coal-fired scheme comes to fruition.

Hydropower expansion is already under way and there is a long queue of potential projects with strong regional backing. Several are set to proceed, with a surge in hydro-based supply likely from around 2016. Domestic gas resources could contribute additional capacity, while the utilisation of renewables is set to rise rapidly from a low base. New coal-fired stations are also in the planning stage, with Cambodia open to the long-term possibility of nuclear energy.

Key trends and developments in the Cambodian electricity market:

Thai power producer Ratchaburi Electricity Generating Holding has formed a joint venture (JV) with Cambodian businessman Ly Yong Phat. The JV will undertake the construction of a US\$3bn coal-fired power plant in the Cambodian province of Koh Kong. This agreement comes after Ratchaburi completed a feasibility study for the 1,800 megawatt (MW) plant in February 2012. The JV, named KK Power, is also planning to invest up to US\$30mn in transmission lines that will run between the new

facility and the Tatay hydropower plant in Koh Kong. KK Power is in negotiations with Thai officials regarding tariffs for the coal power plant. If completed, the Koh Kong project would be the largest power plant in Cambodia. Around 90% of the power is to be sold to Thailand.

During the period 2012-2021, Cambodia's overall power generation is expected to increase by an annual average of 24.0%, reaching 10.7TWh. Driving this growth is a new gas-fired scheme that is in the pipeline and should enter service during the forecast period, as well as a massive hydropower expansion programme that includes several dams with capacities exceeding 100MW.

Following anticipated real GDP growth of 4.8% in 2012, BMI forecasts average annual growth of 6.6% between 2012 and 2021. The population is expected to rise from the 2012 level of 14.5mn to 16.1mn during the period to 2021, and net power consumption looks set to increase from 2.49TWh in 2012 to 7.69TWh by 2021. During the period 2012-2021, the average annual growth rate for electricity demand is forecast at 13.2%.

Contents

BMI Industry View

SWOT Analysis

Cambodia Power SWOT

Regional Industry Overview

Industry Forecast Scenario

Cambodia Snapshot (Macro)

Table: Country Snapshot: Economic and Demographic Data, 2011-2021

Table: Country Snapshot: Power Sector

Cambodia Forecast Scenario

Electricity Generation and Power Generating Capacity

Table: Cambodia Total Electricity Generation Data And Forecasts, 2010-2016

Table: Cambodia Total Electricity Generation Long-Term Forecasts, 2015-2021

Table: Cambodia Electricity Generating Capacity Data And Forecasts, 2010-2016

Table: Cambodia Electricity Generating Capacity Long-Term Forecasts, 2015-2021

Electricity Consumption

Table: Cambodia Total Electricity Consumption Data And Forecasts, 2010-2016

Table: Cambodia Total Electricity Consumption Long-Term Forecasts, 2015-2021

Transmission & Distribution, Imports & Exports

Table: Cambodia Electric Power Transmission And Distribution Losses Data And Forecasts, 2010-2016

Table: Cambodia Electric Power Transmission And Distribution Losses Long Term Forecasts

Table: Cambodia Trade Data And Forecasts, 2010-2016

Table: Cambodia Trade Long-Term Forecasts, 2015-2021

Key Policies/Market Structure

Regulation and Competition

Pricing

Key Projects Database

Table: Key Projects Database

Power Risk/Reward Ratings

Asia Regional Power Risk/Reward Ratings

Table: Asia Power Risk/Reward Ratings

Cambodia's Power Risk/Reward Ratings

Rewards

Risks

Competitive Landscape/Company Monitor

Glossary of Terms

- Table: Glossary of Terms
- Methodology And Sources
- Industry Forecasts
- Power Industry - Data Methodology
- Generation and Consumption Data
- Electricity Generation Capacity Data
- Power Risk/Reward Ratings Methodology
- Table: Power Risk/Reward Indicators
- Sources

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