

# China Power Report Q1 2016

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## Abstracts

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**BMI View:** This quarter, we have upwardly revised our gas-fired power generation forecasts to take into account the gas pricing reform implemented by the government, which will see materially lower gas prices for the country's businesses and industrial users. In turn, this will serve to marginally reduce coal-fired generation in the power mix - in line with government efforts to curb coal use.

### Key Trends And Developments

In terms of fuel mix, conventional thermal sources play a key role and are expected to continue to dominate electricity generation as many projects under construction or planned will use coal or gas, and as Chinese efforts in prospecting and exploiting conventional oil and gas resources are set to increase. While other sources of power will play increasingly important roles, China will remain reliant on coal for its power generation over the next decade.

We believe China's push to reduce its carbon emissions profile continues unabated; highlighted in late August by an agreement between the US Department of Energy (DOE) and China's National Energy Administration (NEA) to jointly develop 'clean coal' technologies for commercial use. The memorandum of understanding (MoU) will pave the way for both governments to collaborate on clean coal technologies such as carbon capture, utilisation and storage (CCUS) projects. Despite our belief that clean coal technology, such as CCUS, remains a long way from being commercially viable, due to the high costs and the immaturity of the technology, it still sends a strong signal regarding China's commitment to reducing pollution.

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