

# China Power Report Q4 2015

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## Abstracts

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**BMI View:** The Chinese government's commitment to reducing coal use and tackling pollution - combined with the slowing economy and subdued power consumption - has prompted us to downwardly revise our electricity consumption and coal generation forecasts this quarter. We expect electricity consumption to grow by an annual average of 4.1% between 2015-2024, and coal power generation to decline 3.45% in 2015.

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. Energy poverty is a key concern in the country and coal will remain the only realistic option for providing cheap and abundant energy for the local population over the medium term. Yet, rising coal prices are once again a key threat to the profitability of power generation companies operating in the domestic segment and Chinese utilities have placed collective pressure on the government to moderate proposed restrictions on imported coal, highlighting the difficulties China has in balancing the interests of its mining and power sectors as growth slows.

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