

# France Power Report 2010

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## Abstracts

The new France Power Report from BMI forecasts that the country will account for 7.77% of power generation in developed markets by 2014, and to remain a net exporter of electricity to neighbouring states. BMI's developed markets power generation estimate for 2009 is 7,152 terawatt hours (TWh), representing a decrease of 4.8% over the previous year. We are forecasting a rise in regional generation to 7,745TWh between 2010 and 2014, representing an increase of 6.0%.

Thermal power generation in 2009 is estimated by BMI at 4,199TWh, accounting for 58.7% of the total electricity supplied in the region. Our forecast for 2014 is 4,439TWh, implying 5.7% growth that leaves the market share of thermal generation only slightly lower at 57.3% – in spite of environmental concerns that should be promoting renewables, hydro-electricity and nuclear generation. France's thermal generation in 2009 was 53.9TWh, or 1.28% of the regional total. By 2014, the country is expected to account for 1.19% of thermal generation.

Nuclear energy is the dominant fuel in France, accounting for 38.4% of primary energy demand (PED), followed by oil at 36.2%, gas at 15.9%, coal with a 4.2% share of PED and hydro-electric power with 5.4%. Developed markets energy demand is forecast to reach 3,998mn tonnes of oil equivalent (toe) by 2014, representing 6.5% growth in 2010-2014. France's 2009 market share of 6.58% is set to rise to 6.63% by 2014. France's 411TWh of nuclear demand in 2009 is forecast to reach 460TWh by 2014, with its share of the nuclear market in developed markets rising from 24.83% to 26.73% over the period. BMI is now forecasting French real GDP growth averaging 1.80% per annum between 2010 and 2014, with the 2010 forecast being an increase of 1.60%. Population is expected to expand from 64.2mn to 65.4mn over the period, but GDP per capita and electricity consumption per capita are forecast to be up 4% and 6% respectively by 2014. The country's power consumption is expected to increase from an estimated 431TWh in 2009 to 469TWh by the end of the forecast period, providing a

theoretical supply surplus of around 130TWh, assuming 2.1% average annual growth (2010-2014) in generation.

Between 2010 and 2019, we are forecasting an increase in French electricity generation of 15.0%, which is in the middle of the range for the developed markets. This equates to 8.0% in the 2014-2019 period, up from 6.6% in 2010-2014. PED growth is set to fall from 3.9% in 2010-2014 to 3.8%, representing 7.8% for the entire forecast period. An increase of 27% in hydro-power use during 2010-2019 is one key element of generation growth. Thermal power generation is forecast fall by 8% between 2010 and 2019, with nuclear demand rising by 13%. More details of the longer-term BMI power forecasts can be found at the end of this report.

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