

Germany Power Report 2010

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Abstracts

The new Germany Power Report from BMI forecasts that the country will account for 8.59% of power generation in developed markets by 2013, while retaining an electricity export capability. 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, an increase of 6.0%.

BMI estimate thermal power generation in 2009 was 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. Germany's thermal generation in 2009 was 346TWh, or 8.25% of the regional total. By 2014, the country is expected to account for 8.19% of thermal generation.

Oil is the dominant fuel in Germany, accounting for 39.3% of primary energy demand (PED), followed by coal at 24.5%, gas at 24.2%, nuclear energy at 10.5% and hydro-power with a 1.4% share of PED. Developed markets energy demand is forecast to reach 3,998mn tonnes of oil equivalent (toe) by 2014, representing 6.5% growth in 2010-2014. Germany's 2009 market share of 7.89% is set to rise slightly to 8.20% by 2014. Germany's 135TWh of 2009 nuclear demand is forecast to decline to 130TWh by 2014, with its share of the nuclear market in developed markets falling from 8.16% to 7.55% over the period. BMI is now forecasting German real GDP growth averaging 1.72% per annum between 2010 and 2014, although the 2010 forecast is an increase of 2.00%. Population is expected to contract from 82.1mn to 81.8mn over the period, and GDP per capita and electricity consumption per capita are forecast to rise by 2% and 5% respectively. The country's power consumption is expected to decrease from an estimated 528TWh in 2009 to 557TWh by the end of the forecast period, providing a

theoretical surplus rising from an estimated 69TWh in 2009 to 108TWh in 2014, assuming 2.2% average annual growth in generation in 2010-2014.

Between 2010 and 2019, we are forecasting an increase in German electricity generation of 5.6%, which is bottom of the range for the developed markets. This equates to a decline of 0.8% in 2014-2019, compared with growth of 6.4% in 2010-2014. PED growth is set to fall from 10.4% in 2010-2014 to a contraction of 0.9% during 2014-2019, representing 9.4% for the entire forecast period. An increase of 95% in hydro-power use during 2010-2019 is one key element of generation growth. Thermal power generation is forecast to fall by 12% between 2010 and 2019, with nuclear demand falling by 19%. More details of the longer-term BMI power forecasts can be found later in this report.

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