

Germany Power Report Q1 2016

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Abstracts

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BMI View: Germany will not diverge from its renewable-focused energy policy trajectory - meaning thermal capacity will continue to be squeezed out of the market due to low wholesale electricity prices and unattractive margins.

We expect more financial pain for utilities like E.ON and RWE, while uncertainty over who will shoulder the vast cost of decommissioning existing nuclear capacity will ensure the energy transition remains highly politicised.

Germany will continue to register rapid growth in renewable-based electricity generation and we reiterate that the current coalition government will not diverge from Energiewende (energy transition). This means that Germany will retain its position as a global renewables powerhouse but will continue to grapple with the cost of the Energiewende to the German economy - with the cost of the renewable energy surcharge that is levied on consumer bills for 2016 estimated to rise 3% y-o-y and hit a record level of 6.354 euro cent/KWh.

The government will also have to address structural problems in the utilities sector that pose an existential threat to RWE and E.ON, which have seen their traditional thermal assets marginalised as a result of the huge influx of intermittent renewable and a subsequent collapse in wholesale electricity prices. RWE is the latest utility to respond to problems in the thermal sector, announcing that it will hive off its renewables, grids and retail units into a separate entity and sell a 10% stake in an IPO in 2016.

Contents

BMI Industry View

Table: Headline Power Forecasts (Germany 2014-2020)

SWOT

Industry Forecast

Germany Snapshot

Table: Country Snapshot: Economic and Demographic Data (Germany 2014-2019)

Table: Country Snapshot: Economic and Demographic Data (Germany 2019-2024)

Table: Country Snapshot: Power Sector

Germany Power Forecast Scenario

Electricity Generation And Power Generating Capacity

Table: Total Electricity Generation Data And Forecasts (Germany 2013-2018)

Table: Total Electricity Generation Data And Forecasts (Germany 2019-2024)

Table: Electricity Generating Capacity Data And Forecasts (Germany 2013-2018)

Table: Electricity Generating Capacity Data And Forecasts (Germany 2019-2024)

Table: Total Electricity Consumption Data And Forecasts (Germany 2013-2018)

Table: Total Electricity Consumption Data And Forecasts (Germany 2019-2024)

Transmission & Distribution, Imports & Exports

Table: Electric Power T&D Losses Data And Forecasts (Germany 2013-2018)

Table: Electric Power T&D Losses Data And Forecasts (Germany 2019-2024)

Table: Trade Data And Forecasts (Germany 2013-2018)

Table: Trade Data And Forecasts (Germany 2019-2024)

Industry Risk/Reward Index

Europe - NAWE Power RRI: US Outperforms Tepid European Power Markets

Germany Power Risk/Reward Index

Rewards

Risks

Market Overview

Key Policies And Market Structure

Regulation And Competition

Sustainable Energy Policies

Germany Power Projects Database

Table: Germany Major Projects - Power

Competitive Landscape

E.ON

RWE

EnBW Energie Baden-Württemberg AG (EnBW)

Vattenfall

Verbund
Company Profile
RWE
E.ON
Regional Overview
NAWE Power Regional Overview
Glossary
 Table: Glossary Of Terms
Methodology
Methodology And Sources
Industry Forecast Methodology
Sources
Risk/Reward Index Methodology
 Table: Power Risk/Reward Index Indicators
 Table: Weighting Of Indicators

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