

Hungary Power Report Q2 2016

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Abstracts

BMI View: Hungary's power sector is well developed, with an extensive national supply grid, including cross-border interconnections, and significant domestic generation and capacity. We expect consumption to grow only slowly over the forecast period and this, along with government measures to keep electricity prices well below the regional norm, is deterring investors from committing to new power projects. With few projects in the pipeline, we expect total generation to increase only incrementally between 2016 and 2025. As such Hungary will remain heavily reliant on nuclear power and natural-gas fired power which together account for almost 75% of domestic generation, with limited renewable capacity.

Latest Updates and Structural Trends

Hungary's government has reiterated its commitment to expanding nuclear power capacity via the construction of new reactors at Paks. The works have come under criticism from environmental action groups and neighbouring states such as Austria. The project has also been investigated by the European Commission.

Development of the South Stream gas pipeline may be delayed following news Gazprom has terminated a contract on the construction of a section of the pipeline. The EUR16bn (USD17.3bn) scheme, initially slated to be commissioned by end-2015, was expected to reach full capacity of 63bn cubic metres a year by 2017. The European Commission noted the pipeline project runs counter to the EU law, following which Bulgaria suspended construction of its land until the scheme conforms to the EU requirements.

The project pipeline remains restricted and as such we are maintaining our current forecasts for minimal growth of less than 1% annually in total generation

throughout the forecast period, with small gains in nuclear, natural gas and renewables power compensating for declines in oil and coal fired generation.

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