

Hungary Power Report Q3 2016

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Abstracts

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BMI View: Hungary has a modern and well developed power infrastructure network, with an extensive national grid and sufficient domestic capacity to meet current demand. We are currently forecasting limited growth in the power sector over the medium term, as artificially low prices and limited consumption growth continue to deter investors. The power sector will therefore continue to be dominated by nuclear power and natural-gas fired power, with limited non-hydropower renewables capacity.

Latest Updates and Structural Trends

While economic growth in Hungary is expected to gather pace over the medium term, the country is experiencing a short-term fall in industrial output, particularly in the leading autos sector, which will dampen consumption growth.

Electricity prices are already artificially low in Hungary and the fall in gas prices will further dampen private investor interest in new gas-fired power plants: heading into the European summer, BMI believes prices could fall further (possibly as low as GBp20/therm) amid global gas oversupply and an influx of LNG cargoes, which are set to depress European hub prices.

Works the Paks nuclear power plant remains the main source of capacity growth. A number of suppliers are reportedly positioning themselves to bid for contracts with Rolls-Royce amongst the firms exhibiting at a May 2016 event at the Budapest University of Technology and Economics.

There has been limited movement in the power project pipeline and as a result we are maintaining our forecasts for limited annual growth in generation -

lingering under 1% for most of the forecast period through to 2020.

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