

Philippines Power Report Q1 2016

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Abstracts

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BMI View: We expect robust growth in the power sector in the Philippines, with total generation expected to expand by an average by 4.9% during our 10-year forecast period to 2024.

With recovery from the 2013 typhoon gathering pace, reasonable domestic economic growth and a range of new projects being announced, overall the future is looking positive for the Philippine power market.

Latest Updates And Structural Trends Notwithstanding the adverse effects that linger from Typhoon Haiyan that struck the Philippines in late 2013, we still expect to see growth in the longer term, with a range of projects including coal-fired plants and various renewable energy constructions in the pipeline.

We forecast total electricity generation growth of 4.8% in 2015, reaching 76.8TWh.

Further growth throughout the forecast period means total generation is expected to reach 118TWh by 2024.

Thermal energy will continue to dominate the energy market in the Philippines, accounting for over 70% of total electricity generation in 2015.

Healthy growth is expected across coal, natural gas and hydropower.

However, we expect to see small declines in oil generation.

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