

Philippines Power Report Q2 2016

<https://marketpublishers.com/r/P95492FB2A9EN.html>

Date: March 2016

Pages: 69

Price: US\$ 1,295.00 (Single User License)

ID: P95492FB2A9EN

Abstracts

BMI View: We expect robust growth in the power sector in the Philippines, with total generation expected to expand by an average of 4.8% during our 10-year forecast period to 2025. 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 5.2% in 2016, reaching 81.7TWh. Further growth throughout the forecast period means total generation is expected to reach 122TWh by 2025.

Thermal energy will continue to dominate the energy market in the Philippines, accounting for over 70% of total electricity generation through our forecast period. Healthy growth is expected across coal, natural gas and hydropower.

The growth in electricity generation means we expect the Philippines will be able to keep up with the expected increases in consumption, which we forecast will grow by about 5.0% a year, although the country is vulnerable to fluctuations and we believe the power situation will remain tenuous.

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