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Abstracts

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BMI View: The state-controlled power industry remains committed to the use of gas as its primary energy source, in spite of the growing demands from the country's many export projects. Over the longer term there is renewables potential – particularly in solar energy – and Qatar may flirt with the possibility of nuclear power. In the meantime, Qatar is in a race to build gas-fired generation in time to meet the growing demands of an expanding population and a rapidly growing economy.

Key trends and recent developments in the Qatari electricity market include:

The Qatari government is planning to spend more than US\$5bn by end-2013 to increase its electricity and potable water generation capacity, reports Reuters, citing Qatar Electricity & Water Company (QEWCo) CEO Abdulsattar al-Rasheed. US\$2.4bn will be invested in 2012, while US\$2.8bn will be spent in 2013. New projects include a 2,250 megawatt (MW) power plant. The government invested US\$2.2bn in 2010 and US\$1.7bn in 2011 in the power and water sector, al-Rasheed revealed. According to Commercialbank Capital, the government will invest US\$9bn and US\$6.9bn in the power and water sectors respectively over the coming years.

On May 29 2012, Qatar Solar Technologies – a joint venture (JV) between German-based Solarworld and several Qatari entities – announced that it had secured US\$1bn worth of financing for the construction of a flagship polysilicon plant in Ras Laffan Industrial City. The government is aiming for solar power to account for 10% of total energy consumption by 2018. However, our forecasts are more pessimistic, and we do not expect renewables to feature prominently in

the country's energy mix for the foreseeable future. During the period 2012-2021, Qatar's overall power generation is expected to increase by an annual average of more than 7.11%, reaching 48.8TWh. Driving this growth is an annual 7.11% gain in gas-fired generation, which remains the key form of power supply in the country. Conventional thermal sources are expected to remain the dominant fuel for electricity generation in the coming years, with all power projects currently planned or under construction using gas.

Following an increase in 2011 real GDP of an estimated 17.2%, BMI forecasts average annual growth of 7.1% between 2012 and 2021. The population is expected to rise from the current level of 1.53mn to 1.74mn during the period to 2021, and net power consumption looks set to increase from an estimated 22.3TWh in 2011 to 42.7TWh by 2021. During the period 2012-2021, the average annual growth rate for electricity demand is forecast at 6.7%.

Thanks partly to the forecast rise in net generation, the growth of which exceeds the underlying demand trend, Qatar has the potential to develop a modest supply surplus for export to neighbouring countries. An unchanged percentage of transmission and distribution losses, hovering at around 9.0% over the forecast period, will do little to strengthen the market. Any near-term supply shortfall should have been eradicated by the end of the forecast period.

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