

Saudi Arabia Power Report Q3 2016

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Abstracts

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BMI View: The Saudi Arabian government's plan to diversify its power sector away from oil-fired generation will be restricted as continued low oil prices constrain fiscal spending. Thermal power generation will remain dominant over our 10-year forecast period, particularly through gas-fired projects. Fiscal pressures and stringent local content requirements will be an obstacle to the nascent renewable power sector and the government will struggle to meet its capacity targets.

Latest Trends And Developments:

To finance construction of the 2640 megawatt (MW) Shuqaiq power plant, the Saudi Electricity Company (SEC) has signed a USD900mn loan agreement with the Export-Import Bank of Korea (KEXIM) and several other international banks, including Santander Bank, Deutsche Bank and the Bank of Tokyo Mitsubishi UFJ. The total cost of the power plant is estimated at USD3.2bn.

Under the newly unveiled 'Saudi Arabia Vision 2030' plan, the government has announced that it now plans to increase gas-fired capacity to generate 70% of total electricity output in the country by 2030.

Under the same plan, the Saudi Arabian government has decided to alter its renewables targets. Targets have been reduced to 9.5GW of renewables capacity by 2023. This is after the decision was made to push back the target of 41GW of solar to 2040 (after it was originally planned for 2032). We forecast these decreased targets will remain due to the prolonged period of low oil prices forecast, which will drag down government revenue and constrain fiscal spending.

We also note that the plan makes no mention of nuclear power, which we will monitor as it could mean that future plans for nuclear will be scrapped.

The amount of gas required to reach the desired goals outlined in the Vision 2030 plan means we do not include this into our forecasts as of yet until we see progress in developing gas-fired capacity (as well as gas exploration) to the capacity required to achieve this target.

SEC has called for two tenders of 50 megawatts (MW) of solar capacity each. The two solar farms are planned to be in the regions of Al-Jouf and Rafha.

Contents

BMI Industry View

Table: Headline Power Forecasts (2015-2021)

SWOT

Industry Forecast

Saudi Arabia Snapshot

Table: Country Snapshot: Economic and Demographic Data (Saudi Arabia 2014-2019)

Table: Country Snapshot: Economic and Demographic Data (Saudi Arabia 2020-2025)

Table: Country Snapshot: Power Sector

Saudi Arabia Power Forecast Scenario

Electricity Generation And Power Generating Capacity

Table: Saudi Arabia - Original 2032 Power Sector Targets (Eventually Pushed Back To 2040)

Table: Total Electricity Generation Data And Forecasts (Saudi Arabia 2014-2019)

Table: Total Electricity Generation Data And Forecasts (Saudi Arabia 2020-2025)

Table: Electricity Generating Capacity Data And Forecasts (Saudi Arabia 2014-2019)

Table: Electricity Generating Capacity Data And Forecasts (Saudi Arabia 2020-2025)

Electricity Consumption

Table: Total Electricity Consumption Data And Forecasts (Saudi Arabia 2014-2019)

Table: Total Electricity Consumption Data And Forecasts (Saudi Arabia 2020-2025)

Transmission & Distribution

Table: Electric Power T&D Losses Data And Forecasts (Saudi Arabia 2014-2019)

Table: Electric Power T&D Losses Data And Forecasts (Saudi Arabia 2020-2025)

Industry Risk/Reward Index

MENA Power Risk/Reward Index

Table: MENA Power Risk/Reward Index

Saudi Arabia Power Risk Reward Index

Rewards

Market Overview

Key Policies And Market Structure

Regulation And Competition

Table: IPP - Investment Opportunities

Sustainable Energy Policies

Saudi Arabia Power Projects Database

Competitive Landscape

Saudi Electricity Company (SEC)

Regional Overview

Middle East And Africa - Regional Overview

Glossary

Table: Glossary Of Terms

Methodology

Methodology And Sources

Industry Forecast Methodology

Sources

Risk/Reward Index Methodology

Table: Power Risk/Reward Index Indicators

Table: Weighting Of Indicators

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