

South Korea Power Report Q3 2016

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Abstracts

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BMI View: The outlook for South Korea's renewables industry remains muted, despite the recent announcement of the government's clean energy investment plan. The country's challenging regulatory environment for renewables and the availability of cheaper sources of power, notably nuclear and coal, will undermine investment in the sector.

Latest Updates And Structural Trends

We forecast overall power generation to grow at an average of 3.6% a year between 2016 and 2025, reaching 788.4 terawatt hours (TWh) by the end of the period. While coal- and gas-fired generation will continue to play a vital role, we expect nuclear generation to have the fastest growth rates. That said, we believe high growth rates will feature more greatly in the second half of our 10-year forecast period, given the current high level of public distrust of nuclear power.

The South Korean market for liquefied natural gas (LNG) will cool in the near-term, as high prices and company obligations to cut expenditure will see Kogas and utilities trim LNG purchases and rely on nuclear whenever possible. In the longer term, new gas power plants and the country's quest to increase power supply to the market will mean LNG demand rises, although we have also moderated our forecasts to show slower demand growth.

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