

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.

Contents

BMI Industry View

Table: Headline Power Forecasts (South Korea 2015-2021)

Latest Updates And Structural Trends

SWOT

Industry Forecast

South Korea Snapshot

Table: Country Snapshot: Economic and Demographic Data (South Korea 2015-2019)

Table: Country Snapshot: Economic and Demographic Data (South Korea 2020-2025)

Table: Country Snapshot: Power Sector

South Korea Power Forecast Scenario

Coal Generation And Capacity Forecasts

Nuclear Generation And Capacity Forecasts

Gas Generation And Capacity Forecasts

Renewables Generation And Capacity Forecasts

Table: Total Electricity Generation Data And Forecasts (South Korea 2014-2019)

Table: Total Electricity Generation Data And Forecasts (South Korea 2020-2025)

Table: Electricity Generating Capacity Data And Forecasts (South Korea 2014-2019)

Table: Electricity Generating Capacity Data And Forecasts (South Korea 2020-2025)

Electricity Consumption

Table: Total Electricity Consumption Data And Forecasts (South Korea 2014-2019)

Table: Total Electricity Consumption Data And Forecasts (South Korea 2020-2025)

Transmission And Distribution, Imports And Exports

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

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

Industry Risk/Reward Index

Asia Power RRI: China's Score Slipping, India Pushing Ahead

Table: Asia Power Risk/Reward Ratings (Scores Out Of 100)

South Korea Power Risk/Reward Index

Rewards

Risks

Market Overview

Key Policies And Market Structure

Regulation And Competition

Sustainable Energy Policies

Pricing

Carbon Trading

Table: Emissions Reduction Targets By Industry

Table: Top Emitters Of Carbon Dioxide In 2012 By Country
South Korea Power Projects Database
Table: Key Power Projects
Competitive Landscape
Company Profile
Korea Electric Power Corporation (Kepeco)
Regional Overview
Asia - Asia Power: Shifting Fuel Dynamics, Coal Still King
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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