

Spain Power Report 2010

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Abstracts

The new Spain Power Report from BMI forecasts the country will account for 3.98% of Developed Markets power generation by 2014, and have the ability to export small volumes of electricity to neighbouring states. BMI's Developed Markets power generation estimate for 2009 is 7,152 terawatt hours (TWh), representing a decrease of 4.8% over the previous year. We are forecasting a rise in regional generation to 7,745TWh between 2010 and 2014, representing an increase of 6.0%. Developed Markets' Thermal power generation in 2009 is estimated by BMI at 4,199TWh, accounting for 58.7% of the total electricity supplied in the region. Our forecast for 2014 is 4,439TWh, implying 5.7% growth that leaves the market share of thermal generation only slightly lower at 57.3% – in spite of environmental concerns that should be promoting renewables, hydro-electricity and nuclear generation. Spain's thermal generation in 2009 was 164TWh, or 3.90% of the regional total. By 2014, the country is expected to account for 3.56% of thermal generation.

For Spain, oil is the dominant fuel, accounting for 55.0% of primary energy demand (PED), followed by gas at 23.5%, coal at 8.0%, nuclear energy at 9.0% and hydro-power with a 4.6% share of PED. Developed markets energy demand is forecast to reach 3,998mn tonnes of oil equivalent (toe) by 2014, representing 6.5% growth in 2010-2014. Spain's 2009 market share of 3.62% is set to rise to 3.85% by 2014. Spain's 53TWh of nuclear demand in 2009 is forecast to reach 61TWh by 2014, with its share of Developed Markets nuclear power rising from 3.20% to 3.54% over the period.

BMI is now forecasting Spanish real GDP growth averaging 1.06% per annum between 2010 and 2014, with a 2010 decline forecast at 0.60%. Population is expected to increase from 46.7mn to 49.1mn over the period, with GDP per capita and electricity consumption per capita forecast to increase by 3% and 1% respectively. The country's power consumption is expected to increase from an estimated 256TWh in 2009 to 267TWh by the end of the forecast period, providing a theoretical supply surplus rising

from an estimated 33TWh in 2009 to 41TWh in 2014, assuming 1.3% average annual growth in 2010-2014 generation.

Between 2010 and 2019, we are forecasting an increase in Spanish electricity generation of 14.9%, which is middle of the range for the developed markets. This equates to 7.7% in the 2014-2019 period, up from 6.7% in 2010-14. PED growth is set to fall from 12.6% in 2010-14 to 12.0% during 2014-19, representing 26.1% for the entire forecast period. An increase of 61% in hydro-power use during 2010-19 is one key element of generation growth. Thermal power generation is forecast to fall by 1% between 2010 and 2019, with nuclear use up 11%. More details of the longer-term BMI power forecasts can be found at the end of this report.

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