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Abstracts

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BMI View: Spain has a mature power market which benefits from an extensive transmission and distribution network, including multiple interconnections with neighbouring states, and a diversified energy mix. The regulatory environment has been clarified in recent years, creating a more secure operating environment though we note ongoing government austerity measures have reduced the attractiveness of investment in new capacity. Non-hydropower renewables, which already account for around a quarter of generation, continue to present a potential growth area and the market is home to a number of global power firms which bring significant capital and expertise to the sector. As coal and oil generation continue to be phased out we do expect to see further growth in renewables, though overall limited consumption growth and lack of incentives mean future investment in new capacity will remain subdued.

Latest Updates and Structural Trends:

German wind turbine manufacturer Nordex will acquire Acciona Windpower from its Spanish parent firm Acciona for EUR785mn (USD884.38mn). The transaction is expected to be completed by Q116, subject to approval by the competition authorities.

Acciona's energy unit, Acciona Energia meanwhile continues to focus on overseas expansions having recently announced plans to build a USD343mn photovoltaic (PV) plant in Chile's Atacama desert. The El Romero Solar facility will have a maximum capacity of 247MW and produce around 505GWh of electricity a year. The plant will enter the construction phase soon and is scheduled to begin operations in mid-2017.

Contents

BMI Industry View

Table: Headline Power Forecasts (Spain 2014-2020)

SWOT

Industry Forecast

Spain Snapshot

Table: Country Snapshot: Economic and Demographic Data (Spain 2013-2018)

Table: Country Snapshot: Economic and Demographic Data (Spain 2019-2024)

Table: Country Snapshot: Power Sector

Spain Power Forecast Scenario

Thermal Generation And Capacity Forecast

Nuclear Generation And Capacity Forecast

Table: Nuclear Power Reactors Operating In Spain (September 2013)

Hydropower Generation And Capacity Forecast

Renewables Generation And Capacity Forecast

Electricity Generation And Power Generating Capacity

Table: Total Electricity Generation Data And Forecasts (Spain 2013-2018)

Table: Total Electricity Generation Data And Forecasts (Spain 2019-2024)

Table: Electricity Generating Capacity Data And Forecasts (Spain 2013-2018)

Table: Electricity Generating Capacity Data And Forecasts (Spain 2019-2024)

Electricity Consumption

Table: Total Electricity Consumption Data And Forecasts (Spain 2013-2018)

Table: Total Electricity Consumption Data And Forecasts (Spain 2019-2024)

Transmission And Distribution

Table: Electric Power T&D Losses Data And Forecasts (Spain 2013-2018)

Table: Electric Power T&D Losses Data And Forecasts (Spain 2019-2024)

Table: Trade Data And Forecasts (Spain 2013-2018)

Table: Trade Data And Forecasts (Spain 2019-2024)

Industry Risk/Reward Index

NAWE Power RRI: US Outperforms Tepid European Power Markets

Spain Power Risk/Reward Index

Rewards

Risks

Market Overview

Key Policies And Market Structure

Regulation And Competition

Sustainable Energy Policies

Pricing

Table: Electricity Prices In the EU Member States
Spain Power Projects Database

Table: Spain - Top 10 Power Projects By Size (MW)
Competitive Landscape

Endesa

Iberdrola

Red Eléctrica (REE)

Unión Fenosa

Company Profile

Endesa

Iberdrola

Regional Overview

NAWE Power 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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