

Spain Power Report Q4 2015

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Abstracts

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BMI View: The power sector in Spain is mature, with near universal access to the electricity grid and a diverse energy mix which improves supply security. Spain is a net energy exporter - a sector which will receive a boost from the recent completion of a new high voltage connection with neighbouring France and further long-term investment plans. At present, limited public spending capacity and the after affects of a regulatory overhaul mean we are forecasting slow growth in the domestic power sector, with few new developments entering the power project pipeline.

Thermal generation is expected to contract for much of the forecast period, as coal and oil generation is decreased in favour of less carbon heavy natural gas. Hydropower is currently forecast to increase, though growth is set to be more rapid in terms of non-hydropower renewables. The renewables sector in Spain is already well established (grid operator Red Electrica de Espana reports that renewable power plants including hydropower produced 39.5% of Spain's power between January and August 2015) and continues to attract healthy levels of investment despite recent changes to the regulatory environment that make trading conditions less favourable. Overall, we expect total generation in Spain to increase from 245.3 terawatt-hours (TWh) in 2015 to 289.97TWh in 2024, when non-hydropower renewables are expected to account for 27.5% of the energy mix.

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