

Sri Lanka Power Report 2016

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Abstracts

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BMI View: Sri Lankan power generation is estimated to have grown to 13.90TWh in 2015, up 12.4% from 2014. Coal-fired generation grew at an 18.0% pace, with overall thermal generation expanding by 9.1%. During the period 2016-2025, Sri Lanka's overall power generation is expected to increase by an annual average of 5.3%, reaching 23.16TWh by the end of the forecast period. With much of the country's hydropower potential harnessed, growth in this type of generation will slow to 1.25% over the next decade. However, the country is likely to meet its growing demand through coal and renewables.

Latest Updates And Structural Trends

During the period 2016-2025, Sri Lanka's overall power generation is expected to increase by an annual average of 5.27%, reaching 23.16TWh. Driving this growth will mainly be a rise in coal, accompanied by the build-up of output from non-hydro renewables.

The government maintains its bold plan to increase the share of non-conventional renewable energy - its National Energy Policy Target sets out that 10% of grid electricity should be from these sources. Under the Mahinda Chinthana Future Vision, the target is for 20% of the nation's grid electricity is to be sourced from these sources. Despite the push for these isolated and smaller renewable sources, we note that infrastructure limitations (notably from the length of transmission lines and substation transformers) could reduce the benefits and attractiveness of this type of generation.

Sri Lanka's Public Utility Commission announced on July 26, 2016 that it would

begin to revise electricity tariffs every six months beginning in April 2017. This should allow for significantly greater market efficiencies, as producers will now be able to charge rates that are much more closely in line with market developments. Likewise, we believe that this will lead to greater sustainability of the government's fiscal accounts, as well as the accounts of power providers, thereby providing a more stable backdrop for the development and operation of power infrastructure going forward.

Contents

BMI Industry View

Table: Headline Power Forecasts (Sri Lanka 2015-2022)

SWOT

Industry Forecast

Sri Lanka Snapshot

Table: Country Snapshot: Economic and Demographic Data (Sri Lanka 2015-2019)

Table: Country Snapshot: Economic and Demographic Data (Sri Lanka 2020-2025)

Table: Country Snapshot: Power Sector

Sri Lanka Power Forecast Scenario

Electricity Generation and Power Generating Capacity

Table: Total Electricity Generation Data And Forecasts (Sri Lanka 2014-2019)

Table: Total Electricity Generation Data And Forecasts (Sri Lanka 2020-2025)

Table: Electricity Generating Capacity Data And Forecasts (Sri Lanka 2014-2019)

Table: Electricity Generating Capacity Data And Forecasts (Sri Lanka 2020-2025)

Electricity Consumption

Table: Total Electricity Consumption Data And Forecasts (Sri Lanka 2014-2019)

Table: Total Electricity Consumption Data And Forecasts (Sri Lanka 2020-2025)

Transmission & Distribution, Imports & Exports

Table: Distribution Losses

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

Industry Risk Reward Ratings

Asia Power Risk Reward Index

Table: Power RRI By Country (Scores Out Of 100)

Sri Lanka Power Risk/Reward Index

Rewards

Risks

Market Overview

Key Policies And Market Structure

Regulation And Competition

Pricing

Sri Lanka Power Projects Database

Table: BMI Key Power Project Database

Competitive Landscape

CEB

Regional Overview

Asia (Region) - Coal To Dominate, But Contribution To Slip

Table: Bmi's Japan Korea Market Forecast

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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