

Thailand Power Report Q1 2016

<https://marketpublishers.com/r/T2F2D72A410EN.html>

Date: November 2015

Pages: 57

Price: US\$ 1,295.00 (Single User License)

ID: T2F2D72A410EN

Abstracts

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BMI View: Thailand's plan to reduce its reliance on gas-fired power generation will create opportunities for alternatives such as coal and renewables, which poses upside risks to our outlook for the country's energy related infrastructure. We highlight that lower than expected power consumption over the near term means such opportunities will begin to have an impact on infrastructure construction only beyond 2017-2018 as projects are delayed until demand picks up. We retain a modest growth forecast for 2015 and 2016, with power generation set to grow by 3.5% and 3.4% respectively.

Latest Updates And Structural Trends

The largest source of growth in 2016 will be thermal generation, while non-hydropower renewables will be the fastest growing sub-sector at 11.8%. Meanwhile, the Thai power sector's long-term growth outlook is muted, as the country continues to experience challenges in procuring gas supplies and is clearly moving towards increasing reliance on electricity imports. We see electricity generation growing an average of 3.5% per annum between 2015-2024. Growth will be primarily driven by non-hydropower renewable energy generation and coal-fired generation. We see limited scope for expansion in gas-fired generation.

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