

Thailand Power Report Q2 2016

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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 3.3% and 3.1% 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 11.0%. 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 at an average rate of 3.0% per annum between 2016-2025. Growth will be primarily driven by nonhydropower renewable energy generation and coal-fired generation. We see limited scope for expansion in gas-fired generation.

In September 2015, Thailand approved five public-private partnership (PPP) projects worth a total of about THB200bn (USD5.5bn) as part of the country's infrastructure development plan from 2015-2020. The projects will be submitted to the cabinet for authorisation in 2015, according to Deputy Prime Minister Somkid Jatusripitak (InfraPPP World). The approved projects include development of Bangkok's Metropolitan Rapid Transit (MRT) Pink Line and MRT

Yellow Line. The THB56.7bn (USD1.56bn) first elevated train project will connect Kaerai and Min Buri, while the THB54.7bn (USD1.51bn) second project will connect Lat Phrao and Samrong. The government also approved the THB82.4bn (USD2.27bn) Blue Line extension, which will connect Bang Sue and Bang Khae. The preferred bidder will be required to operate and maintain the extension. The other two projects are the THB4.14bn (USD114mn) Nonthaburi waste-to-energy project and the THB2.25bn (USD62mn) Nakhon Ratchasima waste-to-energy facility.

The Thai government updated its green energy agenda with the ambitious 'Alternative Energy Development Plan' (2012-2021). The plan states 25% of total energy consumption must be derived from alternative energy sources by 2021. It targets 2 gigawatts (GW) of solar capacity, 1.2GW of wind capacity and 3.63GW of biomass capacity within that timeframe.

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