

Thailand Power Report Q3 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. That said, the scale of upside risk has been limited somewhat following the announcement that EPAC has approved the construction of a new LNG import terminal at Rayong. 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 3.0% 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.

Thailand's Energy Policy Administration Committee (EPAC) in Q216 approved a plan by stateowned PTT Public Company to build a 5.0mn tonne per annum (tpa) LNG import terminal at Rayong. We are optimistic that the project will proceed because the new terminal will be crucial in meeting Thailand's rising

LNG needs, amid falling domestic gas production and risks to the security of gas supply from Myanmar. The new terminal will cost THB36.8mn (USD1.06mn) and will be sited close to the country's only existing LNG terminal at Map Ta Phut. The government may request that the new terminal be built at a higher 7.5mn tpa capacity, at an additional cost of THB1.7mn (USD0.04mn). The 5.0mn tpa Map Ta Phut terminal will double in capacity from 2017.

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