

Turkey Power Report Q2 2016

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Abstracts

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BMI View: We continue to expect Turkey to remain the most attractive power market in the CEE region this quarter. We foresee power demand in Turkey to be robust over the next decade, given the high levels of investment being channelled into its power sector, the country's capacity expansion plans and its improving economic outlook. There is also considerable political backing for power sector expansion as the government continues to strive for greater energy security and to lower the country's heavy reliance on imports of natural gas through expanding domestic capacity - with renewables and domestically sourced coal leading the way. Yet, while the outlook is bright, the development of Turkey's power sector is complicated by the country's precarious economic and political position.

Key Trends And Developments

We expect thermal generation to dominate the electricity generation mix to the end of our forecast period. While coal- and gas-fired will grow in absolute terms, we expect both to lose their share of generation to hydropower and non-renewables (and potentially nuclear). By 2024 we expect gas to account for 40.37% of total electricity generation (as opposed to 41.75% in 2015), coal to account for 24.81%, hydropower to account for 22.06% and non-hydro renewables to generate 12.08% of all electricity.

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