

Turkey Power Report Q3 2016

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Abstracts

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BMI View: This quarter our core assumptions for the sector remain largely unchanged. We continue to expect Turkey to remain the most attractive power market in the CEE region this quarter and 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 2025 we expect gas to account for 40.14% of total electricity generation (as opposed to 45.78% in 2015), coal to account for 24.76%, hydropower to account for 18.77% and non-hydro renewables to generate 11.70% of all electricity.

Natural gas will remain the predominant source of electricity in the Turkish power mix over our 10-year forecast period to 2025. The renegotiation of contracts to offset lira weakness - with contracts denominated in USD - and additional imports coming, highlight the fuel's continued importance in the mix.

This view is strengthened by the fact there is significant gas infrastructure already in place - both pipeline interconnections and generation capacity - and the fall in gas prices, which in Turkey's case are closely indexed to the oil price.

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