

United Arab Emirates Power Report Q3 2016

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Abstracts

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BMI View: This quarter our forecasts remain virtually unchanged, and we continue to hold an upbeat outlook for the UAE power sector - this is driven by the government's efforts to expand its power capacity. As corroborated by recent developments, we continue to expect the UAE to focus on expanding its nascent nuclear and solar industries, which will result in these two sectors making a much greater contribution to the country's electricity capacity and generation mix over our forecast period. While solar and nuclear gain traction, the role of natural gas in the power mix will diminish, freeing up gas for export. Yet we remain sceptical about the ability of the country to meet its targets with the expected speed.

Key Trends And Developments

Nuclear power generation will be a key component of the UAE's power mix diversification strategy over the next decade. We believe increasing natural gas imports, due to strong power consumption growth and heavy reliance on gas-fired power generation, will be the key driver of such efforts. The continued growth in gas demand will reinforce government support for diversification, adding tailwinds to nuclear power, as well as renewables, over the longer term. Despite the dominance of natural gas, nuclear and renewables will grow significantly over our 10-year forecast period, as a strong project pipeline for nuclear reactors and solar power plants begins to go online.

The UAE's position as a GCC regional hotspot for solar development will remain unrivalled over our 10- year forecast period, as advantageous climatic conditions, the increasing cost competitiveness of solar power and strong government commitment to power mix diversification drive growth. The

strengthening project pipeline is testament to this view.

Inefficient consumption of electricity and a reliance on energy-intensive water desalination plants support our bullish outlook for power consumption in the UAE over the next decade. We expect the government to aim to curb such growth through boosting energy efficiency - efforts we believe will centre on implementing measures that ensure smarter consumption of electricity and water. We expect opportunities to increasingly be on offer for companies that operate in this space, and in turn, this will present a downside risk to our power consumption forecast.

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