

United Kingdom Power Report 2010

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Abstracts

The new UK Power Report from BMI forecasts that the country will account for 5.18% of Developed Markets power generation by 2014, and to retain a modest supply surplus. BMI's Developed Markets power generation estimate for 2009 is 7,152 terawatt hours (TWh), representing a decrease of 4.8% over the previous year. We are forecasting a rise in regional generation to 7,745TWh between 2010 and 2014, representing an increase of 6.0%.

Thermal power generation in 2009 is estimated by BMI at 4,199TWh, accounting for 58.7% of the total electricity supplied in the region. Our forecast for 2014 is 4,439TWh, implying 5.7% growth that leaves the market share of thermal generation only slightly lower at 57.3% – in spite of environmental concerns that should be promoting renewables, hydro-electricity and nuclear generation. The UK's thermal generation in 2009 is estimated at 273TWh, or 6.50% of the regional total. By 2014, the country is expected to account for 6.96% of thermal generation.

For the UK, gas is the leading fuel, accounting for 39.2% of PED, followed by oil at 37.4%, coal at 14.9% and nuclear with a 7.9% share of PED. Developed markets energy demand is forecast to reach 3,998mn tonnes of oil equivalent (toe) by 2014, representing 6.5% growth in 2010-2014. The UK's 2009 market share of 5.41% is set to rise to 5.51% by 2014. The UK's 69.2TWh of nuclear demand in 2009 is forecast to fall to 54.6TWh by 2014 as reactors are decommissioned, with its share of the Developed Markets nuclear market easing from 4.18% to 3.17% over the period.

BMI is now forecasting UK real GDP growth averaging 2.66% per annum between 2010 and 2014, with the 2010 forecast being a rise of 1.00%. Population is expected to expand from 61.8mn to 63.5mn over the period, with GDP per capita rising 35% in dollar terms and electricity consumption per capita increasing by 7%. The country's power consumption is expected to increase from an estimated 332TWh in 2009 to

366TWh by the end of the forecast period, providing surplus capacity easing from an estimated 40TWh in 2009 to 35TWh in 2014, assuming 1.6% average annual growth in power production during 2010-2014.

Between 2010 and 2019, we are forecasting an increase in UK electricity generation of 12.5%, which is middle of the range for the developed markets. This equates to 5.9% in the 2014-2018 period, up from 6.2% in 2010-14. PED growth is set to ease from 7.6% in 2010-14 to 1.2% during 2014-19, representing 8.8% for the entire forecast period. An increase of 27% in nuclear power use during 2010-19 is one key element of generation growth. Thermal power generation is forecast to fall by 3.6% between 2010 and 2019, with hydro use up 131% (from a very low base). More details of the longer-term BMI power forecasts can be found near the end of this report.

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