

# United Kingdom Power Report Q2 2016

<https://marketpublishers.com/r/U3E464D71FDEN.html>

Date: March 2016

Pages: 78

Price: US\$ 1,295.00 (Single User License)

ID: U3E464D71FDEN

## Abstracts

**BMI View:** We have incorporated plans to phase out the UK's remaining coal-fired power capacity by 2025 into our forecasts - based on our view that Amber Rudd's announcement will simply accelerate a trend that is already in play. The biggest challenge will be mobilising investment into replacement capacity amid delays to the UK's flagship nuclear project - something that could require reform of the country's existing capacity mechanism so as to incentivise gas.

### Latest Updates & Structural Trends

We have decided to factor the UK's plans to close all of its coal-fired capacity by 2025 into our 10-year forecasts. There are a number of factors that underpin this forecast - not least that coal plants in the UK are already being closed down due to tightening EU emissions directives, as well as the UK's carbon price floor and plunging gas prices amid global oversupply.

Engie, for example, announced in February 2016 that it would close its 1 gigawatt (GW) Rudge power plant in Staffordshire earlier than expected: in the summer of 2016. Utility SSE similarly announced the closure of its 2GW Fiddler's Ferry power plant in the same week. The closures are a result of declining profitability as wholesale power prices fall on the back of lower commodity prices, and a rise in carbon costs.

In January 2016, the UK's Institution of Mechanical Engineers released a report stating that the UK will face an unprecedented 'energy gap' within the next 10 years. The institute claims that, without plans to stimulate investment in a fleet of new gas plants, policies to stop unabated coal-fired generation and the phasing out of nuclear reactors will combine to create a supply crunch.

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