

Romania Power Epc Market: Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 90 pages | Mordor Intelligence

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Report description:

The Romanian power EPC market is expected to register a CAGR of 2.05% during the forecast period.

The Romanian power EPC market was negatively impacted by the COVID-19 pandemic due to regional lockdowns and decreased power demand. However, the market rebounded in 2022. Factors, such as the rising development of power generation infrastructure, spurred by increasing demand for electricity in the country, are expected to drive the market's growth. However, the lack of investment in the power industry due to unpredictable government policies, making it difficult for energy developers to draft long-term strategies and deter investment, is expected to restrain the growth of the market studied.

The Romanian government remains determined to slowly phase out coal-based thermal power plants to combat climate change and ensure the sustainability of the electricity sector by ramping up investments in nuclear and across the wind, solar, gas, and biomass as a critical part of its sustainable development strategy. This is expected to provide a great opportunity for the market in the near future.

Romania Power EPC Market Trends

Hydropower to Dominate the Market

Romania, with many rivers, possesses a huge potential for hydropower generation. In 2021, the country had 603 hydropower plants with an installed capacity of 6,313 MW, and the share of electricity generation from hydropower stood at around 29%.

However, with an expected increase in the demand for electricity due to population increase and industrialization, numerous new

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projects are expected to come up, driving the market's growth during the forecast period.

In September 2022, Transelectrica considered constructing a 1,000 MW pumped hydro storage project. The Tarnita - Lapustesti project is expected to generate 1,625 GWh of electricity and reach a value of USD 1,127.78 million. The project construction is expected to commence in 2025 and enter into commercial operation in 2029. Thus, with the upcoming new projects, the hydropower generation segment is expected to dominate the market studied.

Renewal of the Aging Power Generation Fleet

The electricity sector plays an essential role in Romania's development, with a strong influence on economic competitiveness, life quality, and the environment. To meet consumers' expectations in the long run, the Romanian energy sector must become cleaner, more economically robust, and technologically advanced.

As part of its Energy Strategy Outlook for 2030, the government plans to extensively promote the replacement of aging power generation fleets across the country. A considerable share of the country's baseload power plants are nearing their end of life, and some are already economically inefficient and too polluting. The replacement of power generation capacities is expected to require investments of EUR 7-14 billion by 2030, depending on the development scenario. The government has been actively promoting new power generation sources in the country, including nuclear, wind, solar, and hydropower. The government plans to fast-track the construction of long-delayed power plant projects in the country. The nuclear project is expected to be the largest potential sector for investment in the Romanian energy sector over the next decades. The country has two power units with around 1300 MWe power capacity, supplying 17% of Romania's total electricity production, and it is planning to expand its nuclear power program.

Thus, the new investment to renew or refurbish the aging power infrastructure is expected to drive the growth of the market studied during the forecast period.

Romania Power EPC Market Competitor Analysis

The Romanian power EPC market is moderately fragmented. Some of the major players in the market are (in no particular order) JinkoSolar Holding Co. Ltd, Enel SpA, Siemens AG, Romelectro SA, and Mytilineos SA.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

Table of Contents:

1 INTRODUCTION

1.1 Scope of the Study

1.2 Market Definition

1.3 Study Assumptions

2 EXECUTIVE SUMMARY

3 RESEARCH METHODOLOGY

4 MARKET OVERVIEW

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- 4.1 Introduction
- 4.2 Installed Power Capacity Forecast in MW, till 2027
- 4.3 Electricity Generation and Consumption Forecast, till 2027
- 4.4 Electricity Generation, by Fuel Type, 2021
- 4.5 Recent Trends and Developments
- 4.6 Government Policies and Regulations
- 4.7 Market Dynamics
 - 4.7.1 Drivers
 - 4.7.2 Restraints
- 4.8 Supply Chain Analysis
- 4.9 PESTLE Analysis

5 MARKET SEGMENTATION AND ANALYSIS

- 5.1 By Power Generation
 - 5.1.1 Thermal
 - 5.1.2 Hydropower
 - 5.1.3 Nuclear
 - 5.1.4 Renewables
- 5.2 By Power Transmission and Distribution

6 COMPETITIVE LANDSCAPE

- 6.1 Mergers and Acquisitions, Joint Ventures, Collaborations, and Agreements
- 6.2 Strategies Adopted by Leading Players
- 6.3 Company Profiles
 - 6.3.1 Transelectrica SARomelectro SA
 - 6.3.2 Societatea Nationala Nuclearelectrica SAMytilineos SA
 - 6.3.3 Electroalfa
 - 6.3.4 JinkoSolar Holding Co. Ltd
 - 6.3.5 Enel SpA
 - 6.3.6 Siemens AG
 - 6.3.7 E.ON SE
 - 6.3.8 Trina Solar Ltd

7 MARKET OPPORTUNITIES AND FUTURE TRENDS

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