



# Power & Renewables Industry Research

Fitch Solutions Power & Renewables Industry Research service provides in-depth, market-level and thematic analysis. Specialising in emerging and frontier markets where high quality data and information is hard to find and interpret, we produce quarterly industry reports, higher frequency daily analysis and up to 30-year historic and 10-year forecast data series for Power & Renewables.

The Power & Renewables service provides key insights across the global power market, from project level analysis through to global trends. By combining economic, political, regulatory and project level analysis with the latest industry trends and developments, we deliver an integrated and forward-looking view of the industry to project developers, contractors, suppliers, government departments and financial institutions.



## Daily Analysis

Explaining the implications of project, sector or market developments and their impact on our forecasts for capacity, generation, consumption and trade as well as highlighting industry trends.



## Quarterly Strategic Content

Systematically updated forecasts, key industry trends, business environment and company strategy analysis for over 80 Power markets and over 40 Renewables markets globally.



## Data and Forecasts

Comparable and exportable database with 10 year growth forecasts for developed, emerging and frontier markets.



Proprietary Indices and Special Reports Quantify and compare market opportunities and risks using the Power & Renewables Risk/Reward Indices and Project Risk Index. Explore trends and growth areas with thematic special reports.



## Competitor Intelligence

View company profiles, strategies and financials for key players in each sector.



## Analyst Interaction

Speak directly with our sector specialists behind the research for insights and advice.



## Industry Trend Analysis

- Proprietary views that highlight industry opportunities and risks, with regards to a specific market or at a regional or global level.
- Data analysis including market forecasts, and how changing market conditions could and are impacting our segment and country outlooks.
- Independent analysis taking into account the impact of the business environment (industry and market specific), politics and economics.

## Country Markets

Every country is covered with regards to data and analysis – however, greater emphasis is placed on larger and more dynamic markets. All commercially significant developed, emerging and frontier markets are covered in the quarterly country reports. Sections of the quarterly reports include: country specific industry SWOT, data and analysis of top-line and sub-sector generation and capacity growth, consumption forecasts, competitive landscape and company profiles. Regional overviews also provide context for individual market attractiveness, relative to peers.

- Company analysis including financial performance, company strategy, mergers and acquisitions, restructuring activities and investments.
- Proprietary Power & Renewables Risk/Reward Indices and Project Risk Index allow Fitch Solutions to quantify and compare the investment attractiveness of individual markets and provide unique analysis of investment opportunities and risks.



## Data and Forecasts

Comparable indicators for each country include Electricity Generation by fuel/technology, Net Electricity Consumption, Generation Capacity by fuel/technology and Transmission & Distribution Losses, and Electricity Trade. Fuels and technologies that make up Total Electricity Generation are: Coal, Natural Gas, Oil, Nuclear, Hydropower, Hydro-Electric Pumped Storage, Non-Hydro Renewables (Solar, Wind, Biomass, Geothermal). All data can be downloaded to Excel or visualized using the Interactive Charts functionality in Fitch Connect.

## Infrastructure Key Projects Data (KPD)

Fitch Solutions Infrastructure Key Projects Data (KPD) is a comprehensive catalogue of the significant projects across the Transport, Energy & Utilities, Social Infrastructure and Building sectors around the world. For the Renewables sector, we log the technology type (e.g onshore or offshore) as well as the project's equipment providers. The KPD is a highly valuable analytical tool. It compiles data from a comprehensive number of national and international open sources and renders the information in an accessible, standardised and searchable format. This database can be accessed in Fitch Connect and allows you to:

- Identify key project developments at a regional, country or sector level
- Generate projections using project Value, Capacity/Size and Timeframe information
- Benchmark forecasts against project activity and project completion rates
- Plot the project pipeline and pinpoint bottlenecks in the project lifecycle using Status information
- Gauge capital investment and investment volumes by country, sector, stage of development
- Conduct competitor and competitive landscape analysis based company information, nationality and role.

## Company Coverage

The top domestic power companies in each individual market are covered as company profiles in the quarterly power reports. Topics covered in company profiles include recent developments, new

products, company strategy and key financial data. Key players and their market share are also covered (where available) in the forecast sections of the quarterly reports.

## Sources of Information

- Global and market specific industry associations
- Local and multinational company websites for press releases, presentations, annual reports, transcripts and data
- Local and global news sources
- Relevant government departments and multilateral organisations

Our 'Connected Thinking' approach to forecasting and analysis integrates macroeconomic variables and political risk views from our Country Risk service into our industry research. This provides our clients with unique and valuable insight into the external macroeconomic and political forces that will impact their operations and revenue generating potential.



## Quarterly Power Country Report Coverage

<sup>†</sup>Covered in Multi-State Reports - Sudan and South Sudan Power Report.

<sup>†</sup>Reports are published annually.

### Africa

- Algeria<sup>†</sup>
- Angola
- Botswana
- Cote d'Ivoire
- Egypt
- Ethiopia
- Ghana
- Kenya
- Mozambique
- Namibia
- Nigeria
- South Africa
- South Sudan<sup>\*</sup>
- Sudan<sup>\*</sup>
- Tanzania
- Uganda
- Zambia
- Zimbabwe

### Americas

- Argentina
- Brazil
- Canada
- Chile
- Colombia
- Ecuador
- Mexico
- Peru
- United States
- Uruguay
- Venezuela

### Asia

- Australia
- Bangladesh
- Cambodia
- China
- Hong Kong, China<sup>†</sup>
- India
- Indonesia
- Japan
- Laos
- Malaysia
- Myanmar
- New Zealand
- Pakistan
- Philippines
- Singapore<sup>†</sup>
- South Korea
- Sri Lanka<sup>†</sup>
- Taiwan, China<sup>†</sup>
- Thailand
- Vietnam

### Europe

- Austria
- Belgium<sup>†</sup>
- Bulgaria
- Czech Republic
- Denmark
- Finland
- France
- Germany
- Hungary
- Italy
- Kazakhstan
- Kyrgyzstan
- Netherlands
- Norway
- Poland
- Romania
- Russia
- Slovakia
- Spain
- Sweden
- Switzerland
- Tajikistan<sup>†</sup>
- Türkiye
- Turkmenistan
- Ukraine
- United Kingdom
- Uzbekistan

### Middle East

- Iran
- Israel
- Kuwait
- Oman
- Qatar
- Saudi Arabia
- United Arab Emirates





## Quarterly Renewables Country Report Coverage

### Africa

- Egypt
- Kenya
- Morocco
- South Africa

### Americas

- Argentina
- Brazil
- Canada
- Chile
- Mexico
- United States
- Uruguay

### Asia

- Australia
- China
- India
- Indonesia
- Japan
- New Zealand
- Philippines
- South Korea
- Taiwan, China
- Thailand

### Europe

- Austria
- Czech Republic
- Denmark
- Finland
- France
- Germany
- Greece
- Italy
- Netherlands
- Poland
- Portugal
- Russia
- Spain
- Sweden
- Türkiye
- United Kingdom

### Middle East

- Iran
- Saudi Arabia
- United Arab Emirates



## Global Bi-Annual Renewable Reports

- Biomass
- Solar
- Geothermal
- Wind



## Thomas van Lanschot

### Head of Power & Low Carbon Energy Research

Thomas van Lanschot leads our research into global power markets and low carbon energy utilizing over a decade of experience in the field and has worked for several years at Fitch Solutions as a leading analyst for the power and renewables team in London. He joined Fitch Solutions after completing a PhD in energy systems and has used his background in technical renewable analysis to build out new research themes at the company.

Our analysts will always be on hand to explain growth forecasts, present a regional outlook, or help our clients understand the implications of different industry risk scenarios. We call this 'Analyst Added Value'.

## Learn More

Fitch Solutions fuels better informed credit risk and strategy decisions with reliable data, insightful research and powerful analytics. Get the crucial intelligence and fresh perspectives you need, especially in markets where information is hard to find and difficult to interpret. Our data and research are produced with accuracy, granularity and depth. Leverage workflow efficiencies, transparent methodologies, and accessible experts who add extra value to our products.





**For any queries, Contact:**



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