

Angola Power Report Q1 2016

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Abstracts

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BMI View: Angola will not increase its electricity generation through means other than hydropower, due to a lack of oil or gas-fired projects which are economically viable. Furthermore, our bearish forecasts reflect our view that subsequent power projects beyond 2016 will also struggle to progress due to a decrease in government spending following the collapse in oil prices.

Latest Updates And Structural Trends

The phase 2 upgrades to the Cambambe Hydroelectric Dam is set to come online in 2016, which we forecast will add 3 terawatt hours (TWh) to Angola's total electricity generation.

Hydropower is set to increase its dominance of the share of electricity generation throughout our forecast period, reaching 78% of total generation in 2016, up from 68% in 2015.

Lower oil prices and their impact on Angola's wider economy is severely hurting government revenues. As a result, multiple public infrastructure projects have been delayed or even cancelled. The power sector is more secure from this poorer macroeconomic outlook, as investment from Chinese firms remains robust. Electricity generation growth will tail off until the planned projects have reached completion.

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