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Abstracts

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BMI View: We have revised upward our generation and capacity forecasts for Egypt this quarter, taking into consideration a large pipeline of power projects and government's plans to fast-track the development of major thermal plants in the country. That said, we note country and project-specific risks remain pertinent obstacles to Egypt realising its vast power sector potential and capitalising on the robust investor interest.

Latest Updates And Structural Trends

This quarter we have upwardly revised our forecasts for Egypt's power sector on the back of series positive developments over 2015 and 2016. Based on the latest data, we now expect the country's power generation and capacity to average 6.1% and 6.2% growth respectively over the next decade.

In May 2016, Egypt's President Abdel Fattah el-Sisi opened eight power stations in the country. The plants, worth USD2.7bn, added more than 3,600MW to the national electricity grid.

According to reports in May 2016, German engineering firm Siemens installed two 400MW turbines alongside six 500kV generator transformers at the Beni Suef project in Egypt. The 4.8GW facility is reportedly set to become the world's biggest gas-fired combined-cycle power plant complex. The plant is slated to start supplying electricity to the national energy grid by Q117.

Coming from a low base, Egyptian non-hydro renewables will register strong growth, amounting to 19.3% per annum during 2016-2025. This will lift the total non-hydro renewables capacity to around 6.2GW by 2025, up from 1.1GW in

2015.

In April 2016, Saudi Arabian company ACWA Power signed a deal with the Egyptian New and Renewable Energy Authority to build solar and wind plants in Egypt's West Nile area. The company plans to invest between USD10-12bn to install about 10GW of power generation capacity in the country.

In April 2016, Reuters reported Egyptian officials plan to cut energy subsidies by about 43% in FY2016/17, compared to the previous year. The subsidies will amount to more than USD3.9bn.

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