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Kenya Power Report Q3 2016

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Abstracts

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BMI View: Over the next decade, the Kenyan power sector will be characterised by strong growth in nonhydropower renewable capacity. A focus on geothermal will ensure a non-intermittent supply of renewable energy and enable the country to be a non-hydropower renewable outperformer in Sub-Saharan Africa. Continued investments into grid infrastructure and interconnections will enable the increase in electrification rates as well as electricity trading capacity.

Latest Updates And Structural Trends

The development of the 700-megawatt (MW) gas-fired power plant in Mombasa has been cancelled due to concerns that surplus supply will lead to high electricity costs for both homes and businesses.

We maintain our forecasts from last quarter for thermal power generation in Kenya. The increase in nonhydropower renewable generation - especially non-intermittent geothermal power - appears to be crowding out thermal power investments. The cancellation of the Mombasa gas-fired power plant over fears of overcapacity driving up consumer costs seems to confirm this.

KenGen has stated that it will start construction of a 140MW geothermal power plant in Olkaria by the end of 2016. We have included the plant into our forecasts for 2018.

The Rural Electrification Authority has announced that by July 2016, it will start construction on a 55MW solar park in Garissa. The solar plant is also currently included in our forecasts for 2018.

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We maintain our forecasts for hydropower from the previous quarter. We do not forecast any new hydropower capacity coming online over our forecast period and expect hydropower generation to remain at an annual average of between 4.3 terawatt hours (TWh) and 4.5TWh over our 10-year forecast period up until 2025.

Kenya's electrification rate has increased to 50% and the government is planning to increase this level to 70% by mid-2017 through the Last Mile Connectivity Project.

Lamu County has been connected to the national grid after having to depend on diesel-fired generators for the past 53 years.

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