

Nigeria Power Report Q3 2011

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Abstracts

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The newly published Nigeria Power Report from BMI forecasts that the country's power consumption will increase from an estimated 19.7TWh in 2010 to 44.6TWh by the end of the forecast period, assuming 7.7% average annual growth. After power industry usage and system losses, we see surplus supply rising from the theoretical 2.2TWh level seen in 2010 to 4.4TWh by 2020, assuming 7.6% average annual growth in power generation during the period.

Nigeria's power generation in 2010 is put by BMI at 23.5TWh, having risen 6.7% from the 2009 level. BMI is forecasting an average 7.9% annual increase to 34.4TWh between 2011 and 2015. Thermal generation, comprising coal, gas and oil, is expected to grow by 8.34% per annum during the period to 2015, but growth looks set to slow later in the decade.

Gas will remain the dominant source of electricity supply, with market share set to rise from an estimated 65.7% of generation in 2010 to 69.0% by 2015. Gas-fired generation is expected to rise from an estimated 15.4TWh to 23.7TWh over the same period and, by 2020, is likely to have reached 35.3TWh, representing 72.1% of total generation. Oil will remain a relatively significant part of the Nigerian power generation mix, with its market share set to fall from an estimated 6.5% in 2010 to around 4.5% by 2015 as the industry focuses on gas, hydro and renewables. We believe there will be no more than 1.5TWh of oil-fired power generation by the end of the forecast period.

Nigeria's estimated 6.7TWh of hydro generation in 2010 is forecast to reach 9.2TWh by 2015. Hydropower accounted for an estimated 27.8% of overall Nigerian generation in 2010, with its market share set to slip below 27.0% by 2015. Nigeria has abundant renewable energy resources, led by solar energy, biomass, wind and hydro-power, with

potential existing for geothermal and tidal power. Except for largescale hydro-power, which serves as a major source of electricity, the current state of renewable power generation use is very low.

Nigeria shares sixth place with Kenya in BMI's updated Power Business Environment Ratings. Its position should prove secure over the medium term, with Iran, six points below, posing little threat. Import dependency is average for the region, while the proportion of renewables is relatively high. However, the power sector is not particularly competitive, with limited progress towards privatisation.

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