

# South Africa Power Report Q4 2015

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## Abstracts

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**BMI View:** This quarter we have made significant upward revisions to our solar and wind power forecasts, on the back of the added renewables capacity allocated by the South African government under the country's REIPPP auction system. This notwithstanding, our negative outlook for South Africa's power sector continues to remain in place this quarter. Inefficient existing generation capacity, a lack of investment, delays to project commissioning and the precarious financial situation of Eskom show little sign of abating over the short- to- medium-term. This has led our Country Risk team to revise down the nearterm growth forecasts for the country, as rolling blackouts will offset the positive growth impact of lower oil prices. On a more positive note, we highlight that South Africa's power plant and transmission grid infrastructure will continue to offer investment opportunities over our forecast period and beyond, thanks to a buoyant renewables industry, pressure on state utility Eskom to boost generation to avoid power shortages, and South Africa's nascent nuclear expansion plans.

In 2014, electricity generation in South Africa stood at 237.0 terawatt hours (TWh), representing a 1.26% decrease on the previous year. Coal-fired sources of electricity accounted for 93.1% of this figure, and we expect that coal will continue to play a major role in electricity production during the course of our forecast period, rising by an average of 1.31% to stand at 251.4TWh in 2024. Economic growth and demographics will both drive demand upwards.

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