





# AFRICA'S POWER LANDSCAPE


Africa leading the demand for energy




**By 2040** Africa's demand for power will reach the combined demand of Latin America and India



Energy demand growing at **3.5% p.a.** much faster than the global average




**Power generation** expected to increase by **152%** between 2016 & 2040




**+128% Growth** in Africa's energy consumption from 2016 - 2040


**40% of new capacity** could come from gas by 2020




**More than 25%** of total energy could come from clean sources by 2040




Hydro to make up **18% of Africa's power** mix by 2040



**Increasing need** for a diversified power generation mix



**Technology** cost reductions and new business models can accelerate energy access. Sustainable supply through **innovative storage solutions**



Development of **off-grid** and smart solutions



Sources: Standard Bank, BP Africa Energy Outlook 2018 & 17, Africa Energy Outlook 2017, World Energy Outlook 2017

## SUB-SAHARAN AFRICAN REGIONS

West Africa has a high dependence on hydro & gas. Grid generation capacity is estimated at about 20 GW. Of this capacity, more than 50% is gas generation

WEST



NIGERIA

- IPPs: Gas to power
- Distributed off-grid power opportunities
- Sector regulatory reform under way



GHANA

- ECG concessioning – sector reform towards cost reflective tariffs
- IPPs: Gas to power & renewables



COTE d'IVOIRE

- Diversified energy solutions including IPPs

East Africa has seen the fastest progress in electrification in recent years with an access of 40%

EAST



KENYA

- Growth in various technologies
- Off-grid
- Captive power solutions for industrial players



TANZANIA

- Off-grid including solar systems
- Mini-grids



UGANDA

- GETFIT- RE power projects
- Off-grid including solar systems



ETHIOPIA

- Renewables & transmission

Southern & Central Africa have a high dependence on hydro with installed capacity of 9GW

SOUTHERN & CENTRAL



ANGOLA

- Increase generation capacity



MOZAMBIQUE

- Gas, hydro & renewables



NAMIBIA

- Gas to power renewables
- Off-grid



ZAMBIA

- GETFIT- RE power projects
- World Bank Scaling solar program
- Off-grid including solar home systems

South Africa is driving a diversified power mix

SOUTH



SOUTH AFRICA

- IRP finalisation underway
- REIPPP
  - 92 projects
  - 6328MW
  - 27 Round 4 projects signed
- Gas to power
- Off-grid – Commercial & Industrial

Sources: BP Energy Outlook 2018 – Africa –, Africa Energy Outlook 2017

## STANDARD BANK

### ABOUT US



Africa's largest lender by assets  
Over 154 years in Africa



On-the-ground presence across 20 countries in Africa



Partnering with clients to bring about change in the markets in which we operate



Market leader in providing innovative funding solutions



Providing asset finance solutions for owner generators of electricity

### RECENT DEALS



**Unilever C&I:** South Africa Off-grid



**MKOPA:** Kenya and Uganda Off-grid solar systems



**Innowind EDF:** South Africa Wind Power



**Scatec:** South Africa & Mozambique Photovoltaic (PV) Solar