

MENA Power Investment Report

Ed1 2018

1990



2013



Dubai

MENA invests in power assets at 2½ times world average % of GDP

In GCC two decoupled markets for power equipment

- ◆ Public Utility Sector, hostage to oil prices
- ◆ Industry and Construction, driven by private investment

The purpose of this report is to illustrate and quantify the high level of investment in the public and private electricity sectors in the MENA countries.

The GCC countries have the most intense level of investment in electricity infrastructure, public and private of any group of countries in the world and other MENA countries follow not far behind. In the oil and non-oil sectors combined, investment is running at 2.5% of GDP, and 2.4% for the wider MENA. Only China approaches this at 1.9%, while the USA and EU lag far behind with 0.6% and 0.7% respectively. The world average is 1.0%.

MENA holds half the world's oil reserves and 47% of the gas reserves, but has only 5% of the world's population. As the economies of the region diversify, there has been massive expenditure in the private sector on industry and construction and the GCC economies have continued to progress with their own momentum, like micro climates.

Demand for power is growing fast in MENA. Electrical capacity is growing fast in the industrial and construction sectors, as well as the public utilities, financed by the private sector and often masked by official statistics.

Replacements in the utility transmission sector to modernise and up-grade the networks drive demand well above levels dictated by design life or condition-based assessment.

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Power sector capex as % of GDP, comparisons for GCC, MENA, USA, EU, China, World.

GDP growth in oil sector and non-oil sector in GCC countries

Capital expenditure, equipment cost and installed cost of all power investments in MENA, forecast 2017 to 2022.

MENA purchases of total power equipment at selling price by country, forecast 2017 to 2022.

Power and distribution equipment purchases by category of equipment in MENA, forecast 2017 to 2022.

- ◆ Generation - mechanical generating equipment, solar, wind power
- ◆ Generation, Transmission & Distribution - transformers, switchgear, insulators & bushings
- ◆ Transmission & Distribution - cable, towers, poles, meters & smart grid,

Countries profiled

- ◆ GCC - Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, UAE
- ◆ Rest of Middle East - Iran, Iraq, Israel, Jordan, Lebanon, Syria, Yemen
- ◆ Turkey
- ◆ North Africa - Algeria, Egypt, Libya, Morocco, Tunisia.

Profiles of each country under these heading

- ◆ Power infrastructure - generation, renewables, transmission, distribution & supply, voltage analysis of transmission and distribution, smart cities, wholesale markets, regulation, inter-connections.

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