

Sudan Power - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2020 - 2029

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Report description:

The Sudan Power Market size is estimated at 4.36 gigawatt in 2024, and is expected to reach 4.47 gigawatt by 2029, growing at a CAGR of 0.49% during the forecast period (2024-2029).

The market was negatively impacted by the outbreak of COVID-19. Currently, the market has reached pre-pandemic levels.

Key Highlights

- The Sudan government is actively promoting the power sector by increasing electricity access in all parts of the country. Therefore, the demand for grid-connected electricity has been significantly increasing recently and is expected to drive the market during the forecast period.
- However, the lack of power transmission infrastructure and unreliable electricity supply continued to limit private sector developers' investments, hindering the growth of the Sudan power market.
- Sudan announced to build four nuclear power plants by 2030 to fill its energy gap. This is likely to create several opportunities in the Sudan power market soon.

Sudan Power Market Trends

Hydropower Generating Source to Dominate the Market

- Sudan has significant water resources, primarily from the Nile River and its tributaries. This abundance of water provides a

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favorable condition for developing hydropower projects. The country has the potential to tap into its rivers and construct dams for power generation, making hydropower a viable and reliable source of electricity.

- Sudan has several sites with considerable hydropower potential, especially along the Nile River. The construction of large-scale hydropower dams, such as the Merowe Dam and the Grand Ethiopian Renaissance Dam (GERD), demonstrates the country's efforts to harness this potential. These projects have the capacity to generate significant amounts of electricity, making hydropower a prominent contributor to the power market.
- According to the International Renewable Energy Agency, the total installed hydropower capacity in the country was 1,482 MW, an increase of almost 12% compared to 2017.
- However, the country reached this capacity in 2018. After its partition from South Sudan, Sudan faced severe electricity deficiency, and most of the installed hydropower capacity came under South Sudan after separation. The country is expected to harness the hydro potential during the forecast period.
- For instance, Shereik, a hydropower project with a capacity of 420MW, is being planned for development on the Nile River/Basin in Sudan. Currently, the project is in the permitting stage and is set to be developed in a single phase. Construction is projected to begin in 2023, with commercial operation anticipated to commence in 2026.
- Therefore, owing to these points, a hydropower-generating source is expected to dominate the Sudanese power market during the forecast period.

Increasing Renewable Energy Installations Driving Market Demand

- Over the past few years, Sudan has experienced a rise in the adoption of renewable energy installations, including the utilization of various renewable sources such as hydro energy, biofuels, and solar energy for electricity generation. As Sudan relies on power imports, the growing presence of renewable energy is expected to fulfill the country's energy demand while promoting clean and sustainable energy sources.
- According to the International Renewable Energy Agency, the installed capacity of renewable energy has increased in the country over the past few years. In 2022, the installed capacity of renewable energy in the country stood at 1,871 MW compared to 1,740 MW in 2018, registering a growth rate of more than 7.5%.
- The decreasing costs of renewable energy technologies, particularly solar and wind, make them increasingly competitive with conventional fossil fuel-based power generation.
- The Ministry of Water Resources, Irrigation, and Electricity, in collaboration with the UN Development Program (UNDP), initiated a Solar For Agriculture project. This project aligns with the Sudanese government's dedication to the widespread adoption of renewable energy across the country, and it receives support from the UNDP. Specifically focused on solar-powered water pumping, the project contributes to the shared goal of expanding renewable energy in Sudan.
- Hence, owing to these points, the increasing installation of renewable energy is expected to drive the Sudanese power market during the forecast period.

Sudan Power Industry Overview

The Sudanese power market is consolidated. Some key players in this market (in no particular order) include Sudanese Thermal Power Generating Company, Sudanese Electricity Distribution Company, Siemens Energy AG, Ram Energy, and Dal Group.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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