



WFER IX

*When Balance Is Achieved*



**IX** WORLD FORUM  
ON  
**ENERGY REGULATION**

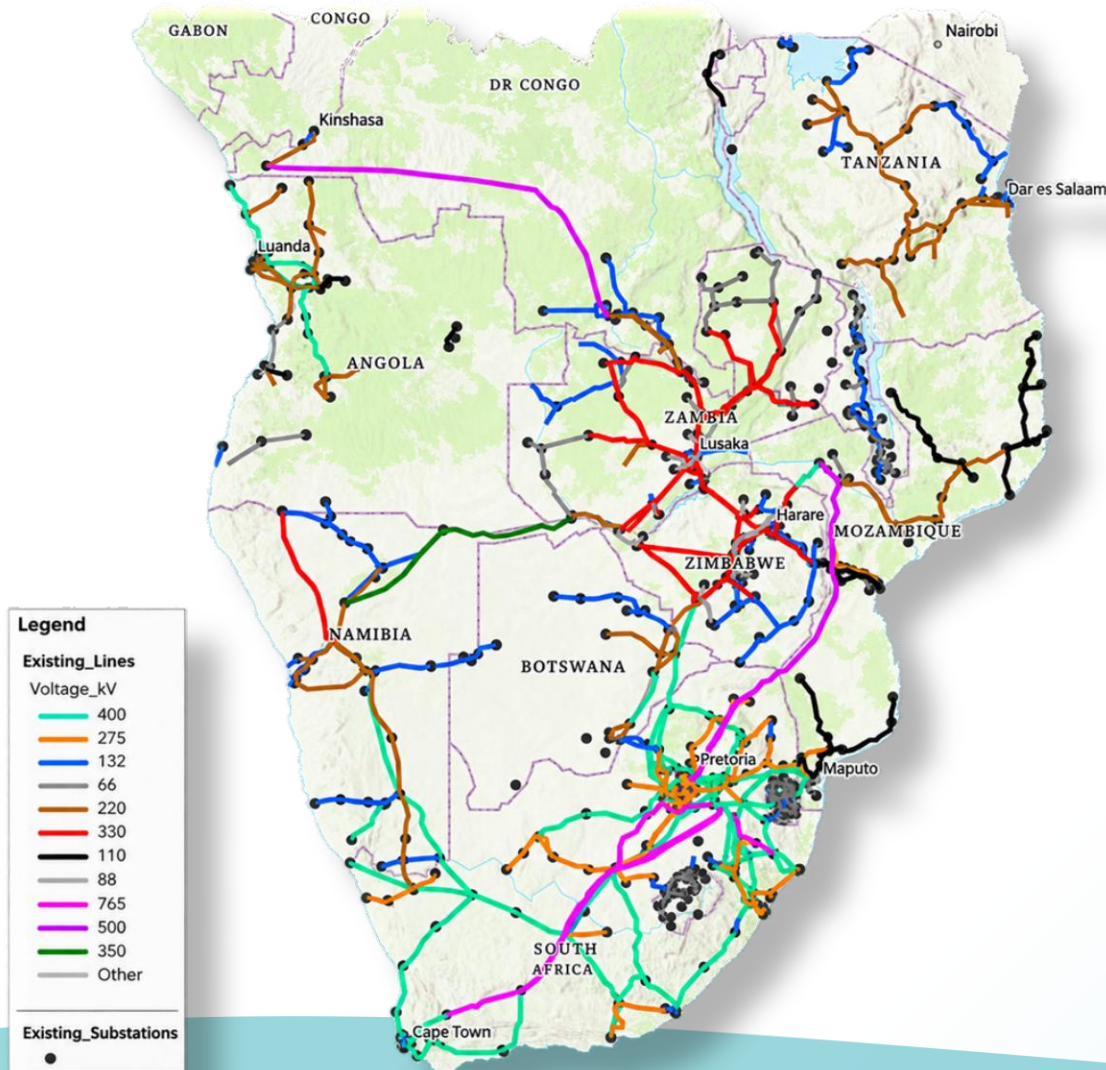
Tbilisi, Georgia, 21-24 September, 2026

# Regional Energy Integration Across Southern Africa

– Vision, Barriers and Lessons from SADC

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# Vision of Regional Energy Integration in SADC



To create a **secure, reliable, affordable, and sustainable regional energy market** where countries can share resources, trade electricity and fuels across borders, optimize infrastructure investments, and enhance energy security for all Member States.

This vision is reflected in the **SADC Protocol on Energy**, the **Regional Infrastructure Development Master Plan (RIDMP)**, and the activities of regional institutions such as the **Southern African Power Pool (SAPP)**, established in 1995.

# Energy Outlook: The Energy Profile of Southern Africa



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- SADC's Energy Capacity and Reserves by Source**

 **49,000 MW** (59% of 83,055 MW)

 **19,900 MW** (24% of 83,055 MW)

 **9,000 MW**

 **5,500 MW**

 **4,500 MW**

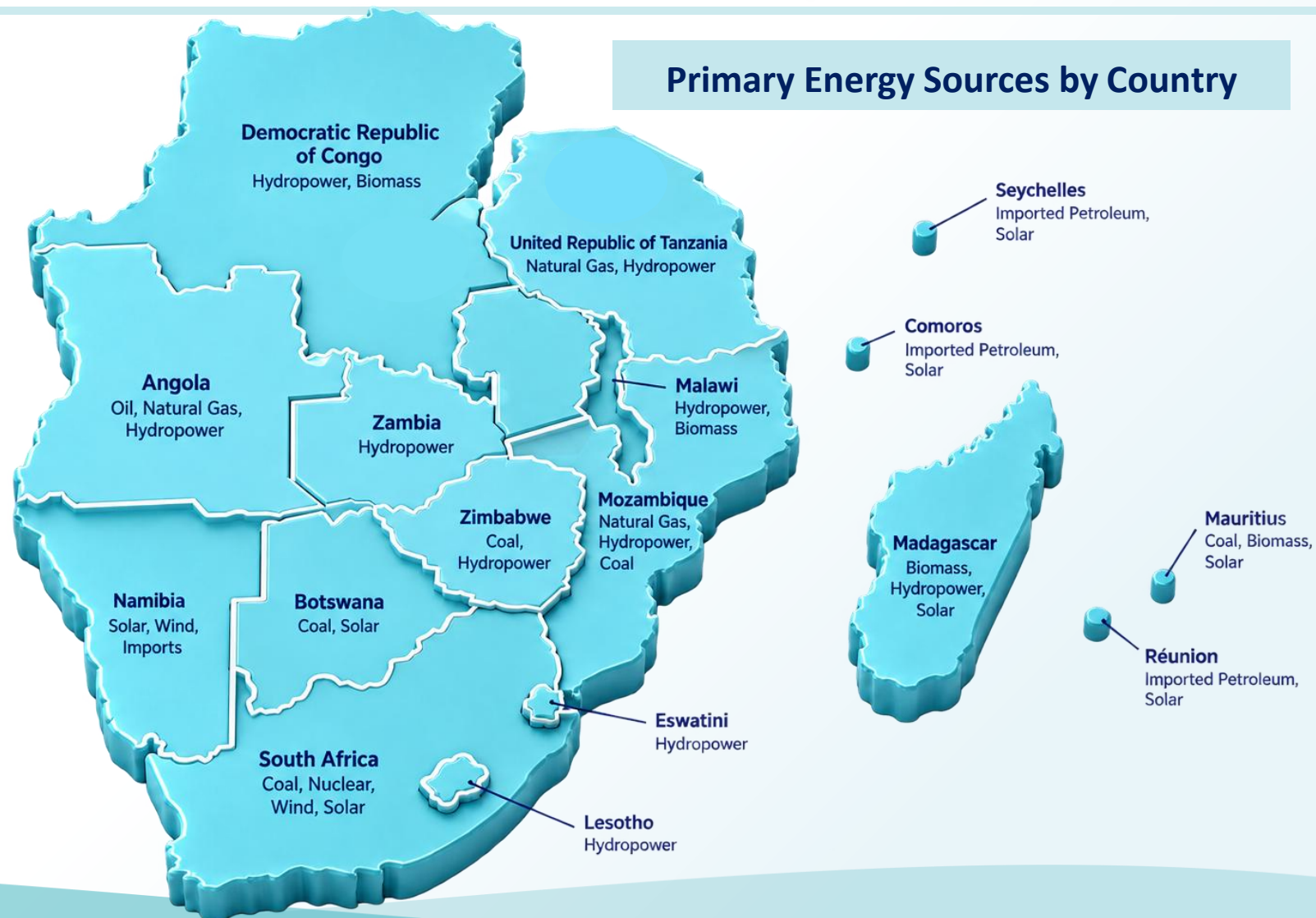
- Estimated Reserves**

 **8 billion barrels**

 **180 Tcf**

 **40 billion tonnes**

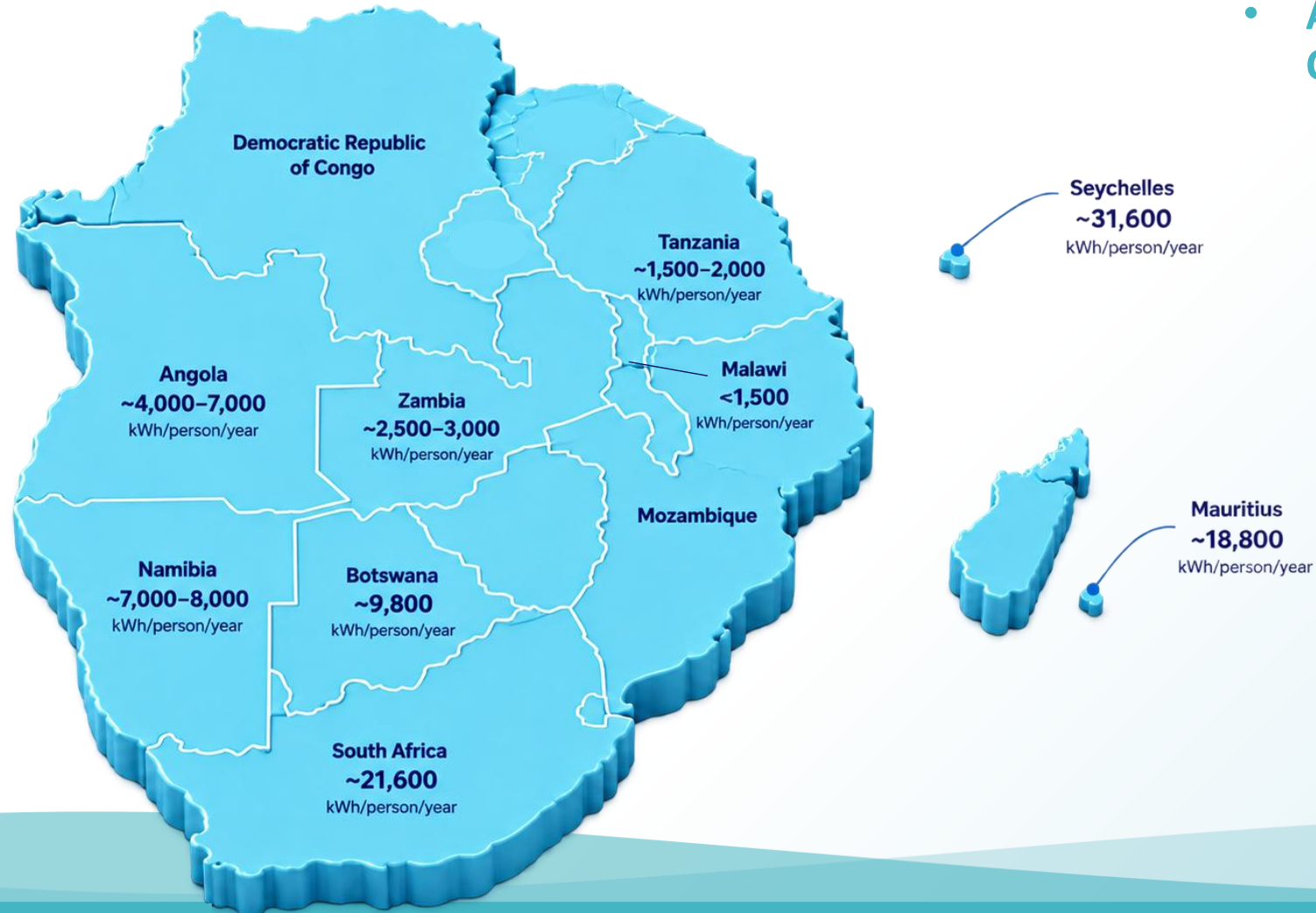
## Primary Energy Sources by Country



# Energy Outlook: The Energy Profile of Southern Africa



## Energy Consumption per Capita



- Approximate Regional Energy Consumption Mix

|                  |            |
|------------------|------------|
| Biomass          | ~ 45 - 55% |
| Oil Products     | ~ 25 - 30% |
| Coal             | ~ 10 - 15% |
| Electricity      | ~ 8 - 12%  |
| Natural Gas      | ~ 3 - 6%   |
| Solar/Wind/Other | <2%        |

# The Key Challenge: Energy for All



## Population Growth

A larger population means greater need for energy, jobs and development.



**430M**

SADC population today (2025/26)



**600–650M**

Projected population by 2050

**+50%**



## Energy Demand

Rising populations and development will significantly increase electricity use.



**5,000–7,000**  
kWh/person/year

Current regional average



**8,000–12,000**  
kWh/person/year

Estimated 2050 demand



Total requirement:  
**more than double**

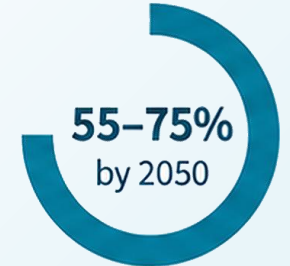


## Modern Fuel Access

Hundreds of millions still lack access to clean, modern cooking fuels.



**25–30%**  
today



**55–75%**  
by 2050

**~300M**  
without access today

**170–300M**  
may still lack access by 2050

# Regional Opportunities Beyond Electricity



## THREE PILLARS



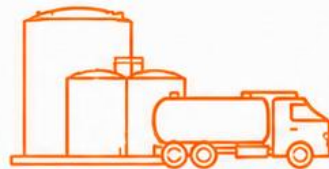
### GAS

- Cross-border gas corridors
- Industrial development
- Gas-to-power
- Regional LNG opportunities



### PETROLEUM PRODUCTS

- Strategic fuel storage
- Shared logistics infrastructure
- Refining and distribution optimization
- Cross-border fuel trade



### BIOFUELS

- Sustainable aviation fuel (SAF)
- Ethanol and biodiesel value chains
- Agricultural integration
- Energy transition opportunities



## DRIVING REGIONAL INTEGRATION



### NATURAL GAS

- Regional fuel for industrialisation
- Cleaner transition fuel replacing coal and fuel oil
- Potential foundation for a Southern African gas market



### BIOFUELS

- High potential in Angola, Mozambique, Tanzania, Zambia and Malawi
- Support energy security, rural development and emissions reduction



### GREEN HYDROGEN

- Namibia, Angola and South Africa could become global exporters due to exceptional solar and wind resources



### REGIONAL HYDROPOWER

- Inga (DRC), Cahora Bassa (Mozambique), Kariba (Zambia/Zimbabwe) and Angola's hydro fleet can provide reliable baseload electricity for regional markets

# Barriers to Regional Energy Integration



While the opportunities for regional integration are substantial, **six key barriers continue to slow progress.**

1



**Infrastructure**  
Transport, storage, processing and distribution networks.

2



**Regulatory Fragmentation**  
Different standards, licensing and frameworks.

3



**Financing**  
High capital needs, risk and limited project pipelines.

4



**Energy Security**  
Supply risks, vulnerability and limited reserves.

5



**Uneven Resource Distribution**  
Complementary resources across countries.

6



**Market Fragmentation**  
Small markets, lower scale and competitiveness.



**Angola's Strategic Advantage**  
Connecting Resources, Infrastructure and Markets



**Oil**  
Provides scale.



**Gas**  
Drives regional integration and industrialisation.



**Biofuels**  
Supports diversification and the energy transition.





**A stronger Angola. A more integrated Southern Africa.**



# Lessons and Good Practices from SADC



The SADC experience offers several lessons for other regional blocs:

1



**Strong Institutional Frameworks Matter**

2



**Market-Based Trading Encourages Efficiency**

3



**Policy Harmonization is Essential**

4



**Regional Planning Reduces Costs**

5



**Private Sector Participation Must Be Expanded**

6



**Regional Value Chains Matter**

# Lessons and Good Practices from SADC



1



## SAPP

### Southern African Power Pool

Integrates electricity markets across the region.

2



## Mozambique – South Africa Gas Corridor

Connects gas resources to regional markets and industry.

3



## Lobito Corridor

Links Atlantic ports to regional markets, enabling trade and energy flows.

4



## Angola – Namibia Emerging Energy Cooperation

Builds on shared resources and infrastructure for a stronger regional energy future.



# Key Takeaways



**01**

Southern Africa has abundant energy resources, but **energy access** remains the central challenge.

**02**

Regional Integration must go **beyond electricity**.

**03**

Energy Integration is ultimately an **economic development** strategy



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## Regional Energy Integration in Southern Africa – Vision and Barriers

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