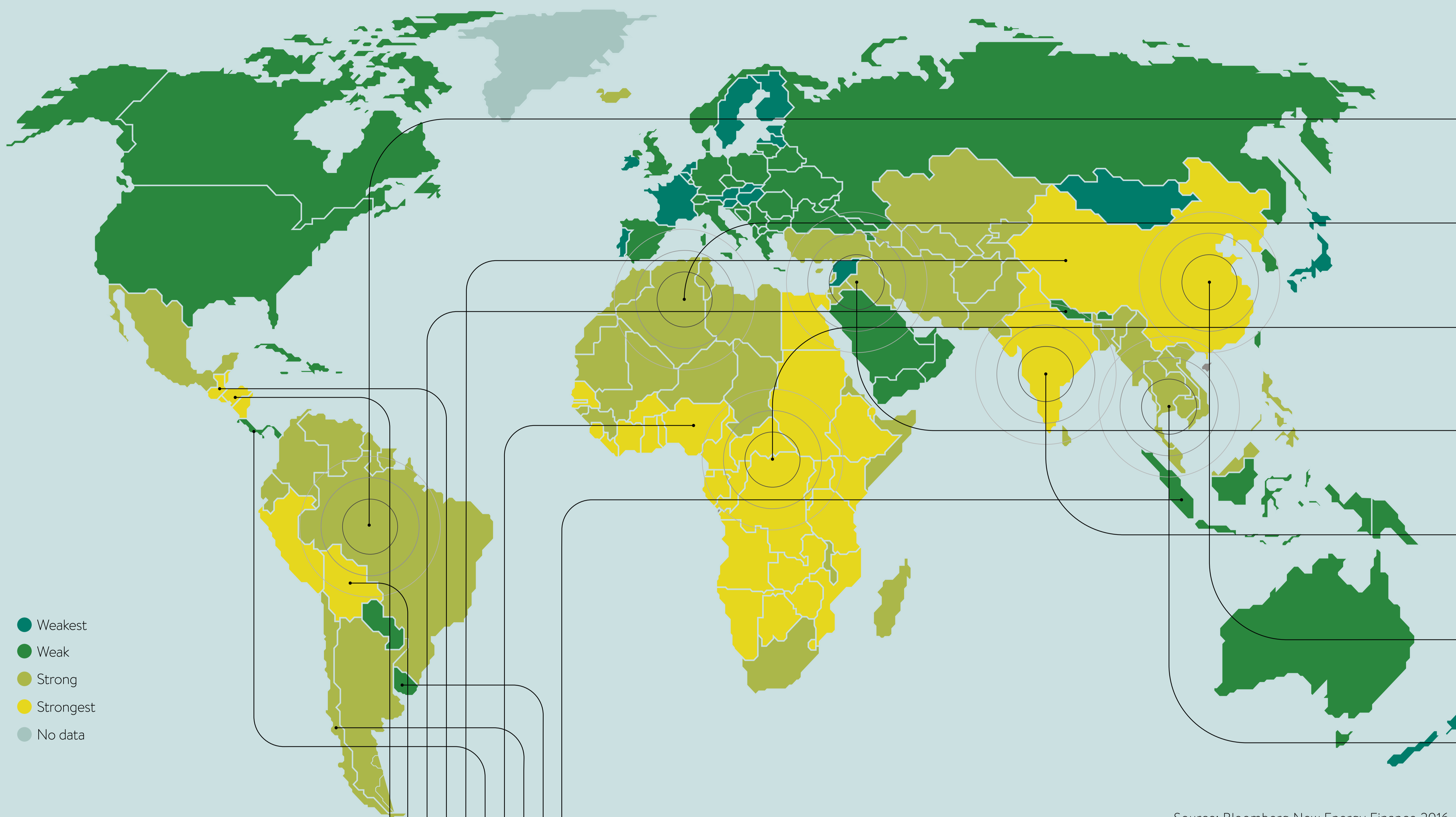
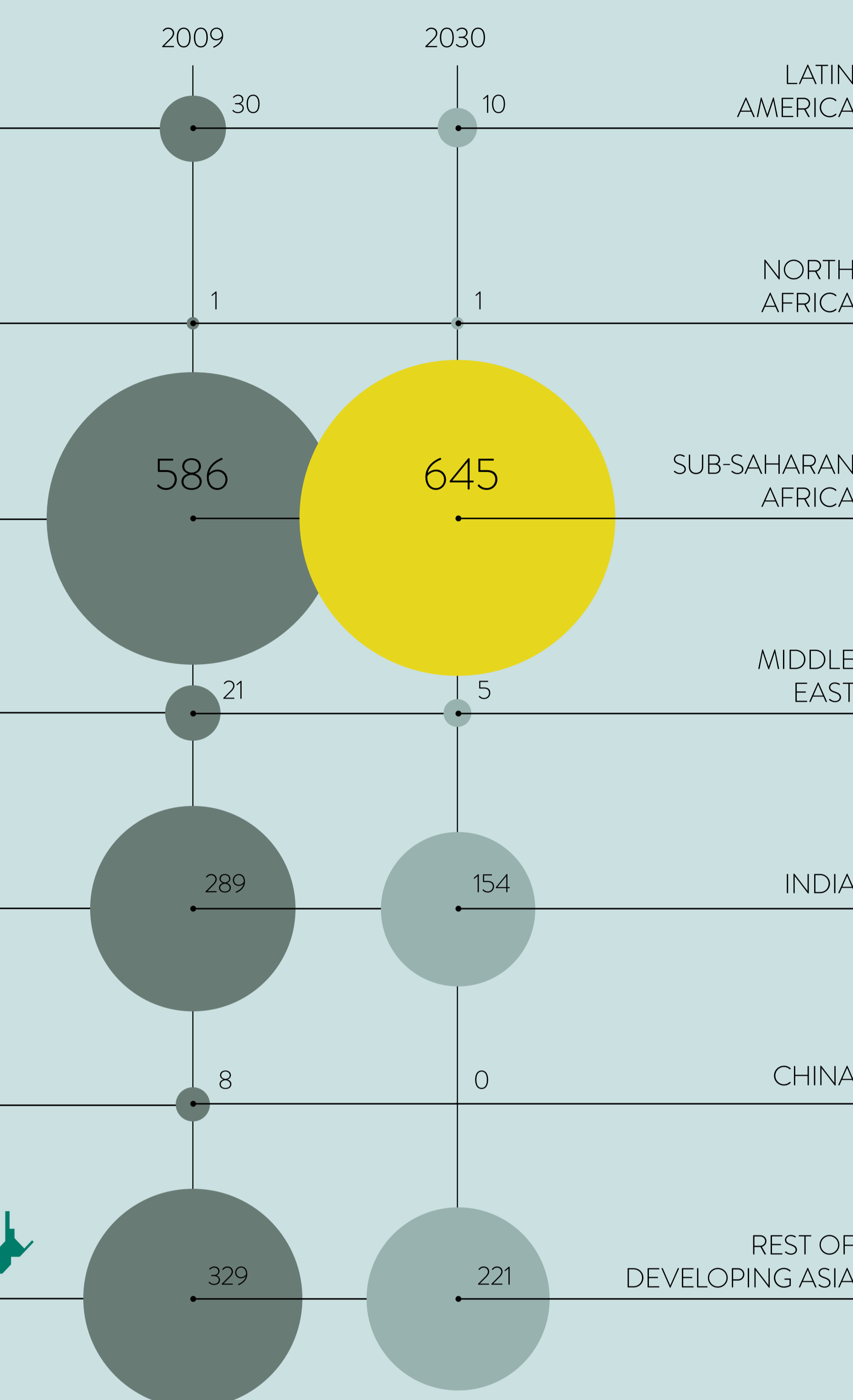


RENEWABLE POWER IN DEVELOPING MARKETS

ANTICIPATED GROWTH OF GLOBAL POWER DEMAND, 2012-30
AFRICA AND ASIA ARE PREDICTED TO SEE THE STRONGEST INCREASE



CURRENT/PROJECTED POPULATIONS WITHOUT ACCESS TO ELECTRICITY (M)
SUB-SAHARAN AFRICA IS THE ONLY REGION IN DEVELOPING AND EMERGING MARKETS THAT IS EXPECTED TO SEE AN INCREASE IN THE NUMBER OF PEOPLE WITHOUT ACCESS TO ELECTRICITY



Source: Bloomberg New Energy Finance 2016

Source: International Energy Agency

- Weakest
- Weak
- Strong
- Strongest
- No data

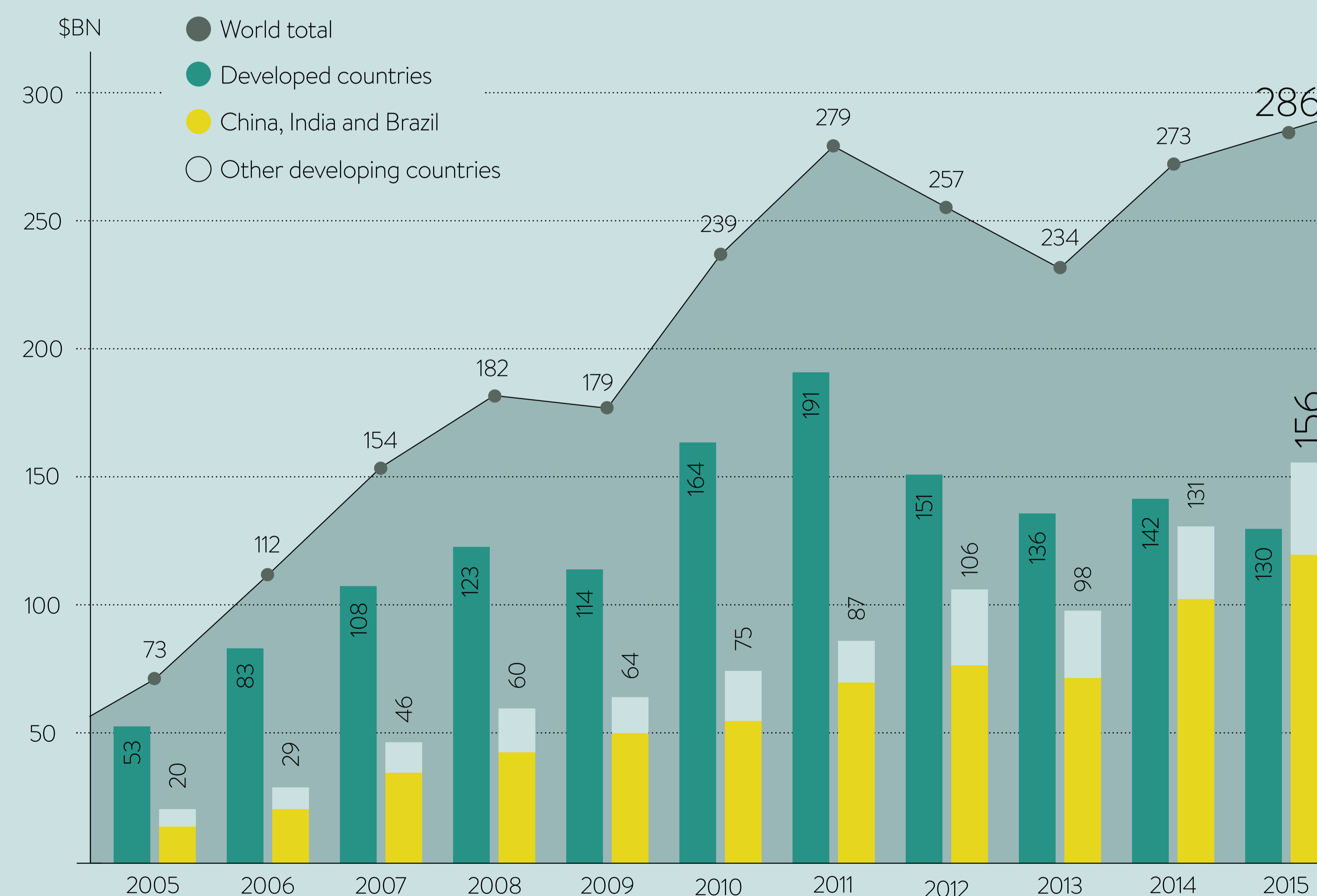
TOP EMERGING MARKETS FOR CLEAN ENERGY INVESTMENT

RANKING MEASURES CLEAN ENERGY INVESTMENT, AVAILABILITY OF LOCAL FUNDS, COST OF DEBT AND GREEN MICROFINANCE ACTIVITY

- 1 HONDURAS
- 2 BOLIVIA
- 3 NEPAL
- 4 GUATEMALA
- 5 CHINA
- 6 PANAMA
- 7 NIGERIA
- 8 CHILE
- 9 URUGUAY
- 10 INDONESIA

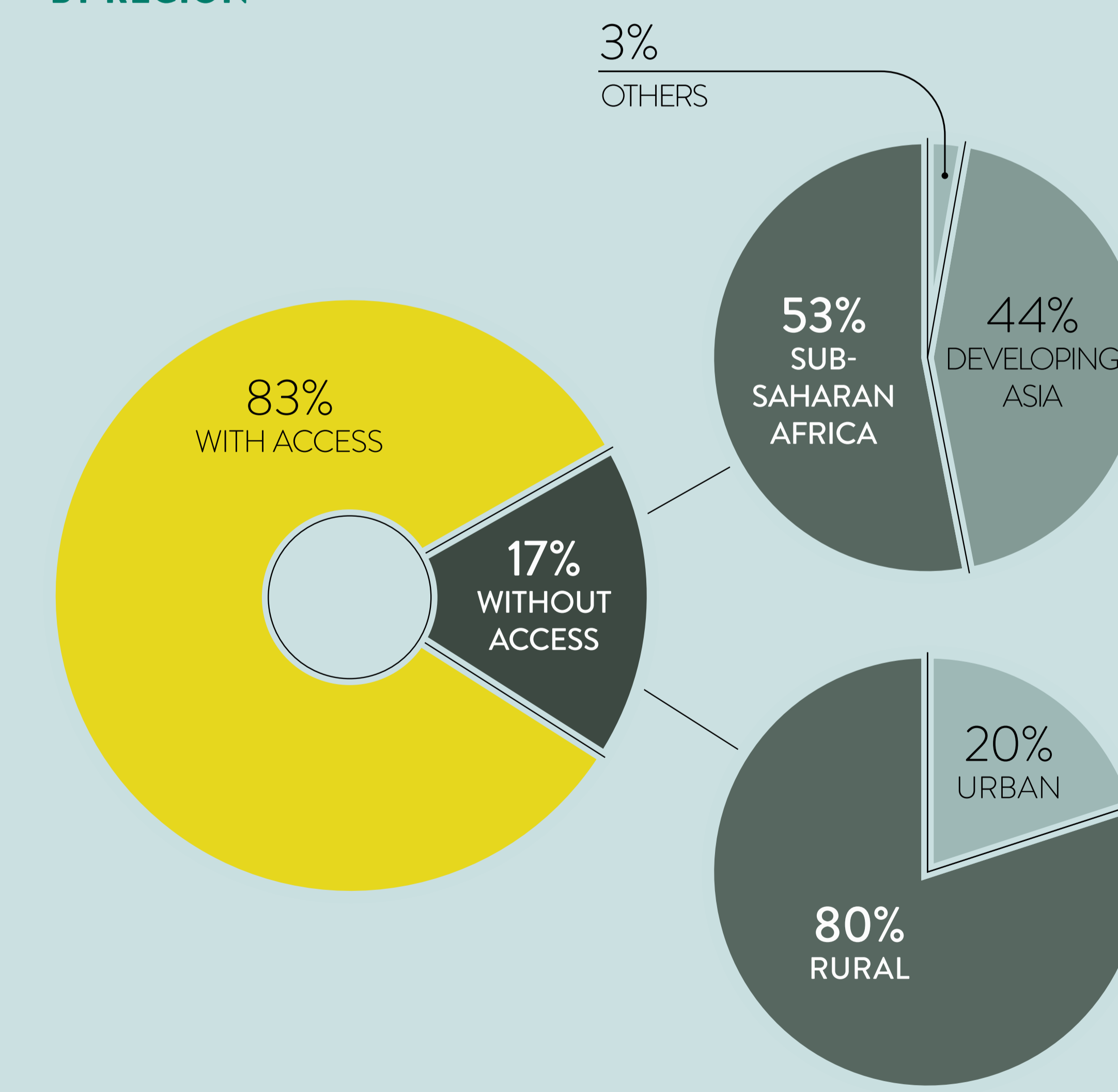
Source: Bloomberg New Energy Finance 2016

GLOBAL NEW INVESTMENT IN RENEWABLES, BY REGION

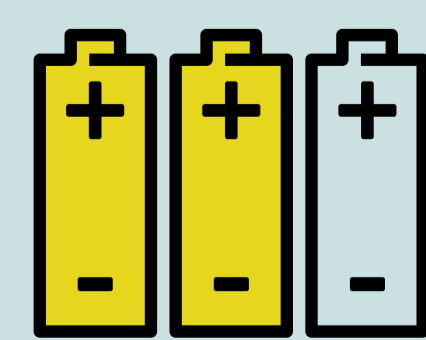


Source: Bloomberg New Energy Finance/UN Environment Programme 2016

WORLD ELECTRICITY ACCESS AND LACK OF ACCESS, BY REGION



Source: International Renewable Energy Agency 2015



2/3

energy demand growth through to 2030 is likely to come from developing countries

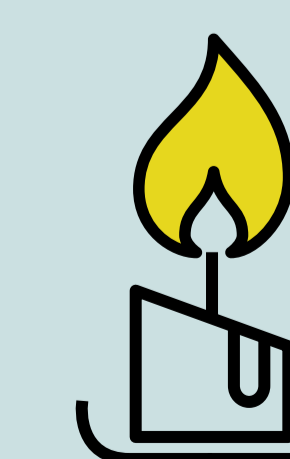
Source: Pew Charitable Trusts 2015



150%

increase expected in new electricity capacity in non-OECD countries by 2030

Source: Pew Charitable Trusts 2015



1bn

people are not expected to have access to electricity by 2030, down from 1.3 billion in 2009

Source: International Energy Agency