

Chile Power Report Q1 2016

<https://marketpublishers.com/r/C6A6D31E08EEN.html>

Date: December 2015

Pages: 65

Price: US\$ 1,295.00 (Single User License)

ID: C6A6D31E08EEN

Abstracts

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BMI View: Chile will be one of the most attractive power markets in Latin America over the coming decade, owing to its stable business environment and investor-friendly regulations, an upbeat macroeconomic outlook and strong growth in power consumption. The government's use of energy auctions for the regulated market, coupled with energy demand from miners located far from the main power network, will create long-term business opportunities for power developers. Meanwhile, the need to strengthen Chile's power grid will create opportunities for providers of transmission infrastructure.

Latest Updates And Structural Trends

We hold an upbeat growth outlook for gas-fired power generation in Chile over the next 10 years, supported by plans to develop several plants, the low cost of LNG and the government's commitment to increasing the role of gas in Chile's energy matrix. Illustrating the growing investor interest in the sector, in November 2015, Chile's national oil company (NOC) ENAP and AES Gener signed a contract whereby the NOC will provide natural gas to the utility for power generation. The first project to benefit from ENAP's LNG will be the 379MW Central Nueva Ronca project, starting in 2016.

In November 2015, power generator E-CL (the Chilean subsidiary of France's Engie) cancelled its plans to build a second coal-fired unit at the Thermoelectric Mejillones Infrastructure complex. The development supports our view that coal-fired power generation will decrease in importance in Chile's generation mix over the coming decade due to faster growth in alternative technologies and coal power's falling cost-competitiveness.

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