

Chile Power Report Q2 2016

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Abstracts

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BMI View: We maintain our positive outlook for Chile's power market, premised on its stable business environment and investor-friendly regulations, an upbeat macroeconomic prospect and robust 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 generators. Meanwhile, the need to expand Chile's power grid will drive demand for transmission infrastructure.

Latest Updates And Structural Trends

In December 2015, Chile's national oil company (NOC) ENAP signed an agreement with Japan's Mitsui for the development of two combined-cycle gas-fired thermal power plants, the 760MW Luz Minera and the 510MW Nueva Era plants. The projects - which reportedly have a cumulative investment value of almost USD1.5bn - are planned to be built in northern and central Chile, respectively, receiving feedstock from the Quintero and Mejillones liquefied natural gas (LNG) import terminals. ENAP plans to bid the two gas-fired projects in the upcoming auction for procuring power for Chile's regulated market, scheduled for May 2016.

In January 2016, a bill allowing ENAP to access the power generation sector - by holding a stake of up to 66% in power generation projects, under joint ventures (JVs) with private companies - received the definitive approval by the Chilean parliament. The government is committed to making ENAP a new pillar of Chile's electricity market, as it hopes that participation of the NOC in the production of electricity from natural gas will drive down the country's electricity

prices.

These developments support our upbeat growth outlook for gas-fired power generation in Chile over the next 10 years. Our forecast is also premised on progress in the development of several other gas-fired power plants in the country, low international LNG prices due to a global glut and the government's commitment to increasing the role of gas in Chile's energy matrix.

Contents

BMI Industry View

Table: Headline Power Forecasts (Chile 2015-2021)

SWOT

Industry Forecast

Chile Snapshot

Table: Country Snapshot: Economic and Demographic Data (Chile 2015-2019)

Table: Country Snapshot: Economic and Demographic Data (Chile 2020-2025)

Table: Country Snapshot: Power Sector

Chile Forecast Scenario

Positive Outlook For Investment And Growth

Coal Generation And Capacity Forecast

Natural Gas Generation And Capacity Forecast

Hydropower Generation And Capacity Forecast

Table: Chile's Major Hydropower Project Pipeline

Renewables Generation And Capacity Forecast

Electricity Generation And Power Generating Capacity

Table: Total Electricity Generation Data And Forecasts (Chile 2014-2019)

Table: Total Electricity Generation Data And Forecasts (Chile 2020-2025)

Table: Electricity Generating Capacity Data And Forecasts (Chile 2014-2019)

Table: Electricity Generating Capacity Data And Forecasts (Chile 2020-2025)

Electricity Consumption

Table: Total Electricity Consumption Data And Forecasts (Chile 2014-2019)

Table: Total Electricity Consumption Data And Forecasts (Chile 2020-2025)

Transmission & Distribution

Table: Electric Power T&D Losses Data And Forecasts (Chile 2014-2019)

Table: Electric Power T&D Losses Data And Forecasts (Chile 2020-2025)

Industry Risk/Reward Index

Industry Risk Reward Index

Table: Macri's Planned Power Policy Reforms

Table: Latin America Power Risk/Reward Index (Scores Out Of 100)

Chile Power Risk/Reward Index

Rewards

Risks

Market Overview

Key Policies And Market Structure

Regulation And Competition

Sustainable Energy Policies

Pricing
Chile Power Projects Database
Competitive Landscape
Transelec
Enersis
ENAP
Engie
AES
Colbún
Pacific Hydro
Company Profile
Enersis
Regional Overview
Latin America Power: Key Themes For 2016
Glossary
 Table: Glossary Of Terms
Methodology
Methodology And Sources
Industry Forecast Methodology
Sources
Risk/Reward Index Methodology
 Table: Power Risk/Reward Index Indicators
 Table: Weighting Of Indicators

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