

Colombia Power Report Q1 2016

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Abstracts

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BMI View: A sharp fall in hydropower generation due to El Niño, coupled with a lack of domestically produced feedstock to ramp up natural gas-fired power generation, will raise a risk of power rationing in Colombia over Q1 2016. The country's robust pipeline of new hydropower and coal-fired power projects supports our positive growth outlook for the market over the long term, with new renewable energy incentives posing only limited upside potential to our forecast for the sector.

Latest Updates And Structural Trends

The impacts of the drought created by the El Niño weather phenomenon will be the main driver of developments in the Colombian power market in 2016. We expect a sharp fall in hydropower generation in 2015-2016, which has forced additional diesel and natural gas-fired power plants to be dispatched. The availability of excess thermal capacity to be used during periods of poor hydrology and plans to import natural gas should both allow Colombia to avoid experiencing power cuts, albeit narrowly.

Due to a lack of domestic feedstock to satisfy the growing demand from power generators, Colombia has agreed to start importing natural gas from Venezuela from January 2016. Also to avoid a shortage of fuel - which forced two power plants to be idled in October - a group of thermal generators has spearheaded the development of a new liquefied natural gas (LNG) import terminal, whose completion is expected by end-2016.

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