

Colombia Power Report Q3 2015

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Abstracts

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BMI View: A vast pipeline of power projects under construction and our forecast for sustained growth in power consumption over the coming decade support our positive outlook for Colombia's power sector. While hydropower will remain the dominant source of electricity in the country, we see upside potential for our growth forecast for gas-fired generation due to Colombia's cyclical exposure to dry weather. The resurgence of FARC's attacks against power infrastructure has increased the country's risk profile, but we maintain that a peace agreement will eventually be reached.

The sharp fall in global oil prices since the second half of 2014 has darkened BMI's outlook for Colombia's economy, with our Country Risk team expecting real GDP to expand at an average annual rate of 3.4% between 2015 and 2024, down from 4%. Nevertheless, we expect robust expansion in the country's mining and manufacturing industries will continue to drive strong growth in electricity consumption over the next decade.

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