

Mexico Power Report Q1 2012

<https://marketpublishers.com/r/M21F54D7EAAEN.html>

Date: January 2012

Pages: 53

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

ID: M21F54D7EAAEN

Abstracts

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BMI View: Mexico continues to aim high in order to meet its ambitious targets for energy produced from renewable sources, with this quarter seeing new investment in wind power, additional funding released for renewable energy projects by the Inter-American Development Bank and a commitment to solar power, with new tenders and projects. Yet at the same time, Mexico is still keeping an eye on traditional sources of energy production. In terms of thermal power stations, one development came from Spanish firm Abengoa as it has been awarded a US\$440mn contract for the development of a combined cycle gas power plant. Nuclear energy remains on the sidelines, for the time being at least, but BMI believes that in order to meet the goals set out in its climate change programme, the government may have to reconsider nuclear as a means of meeting energy requirements in a low-carbon way.

Mexico's ambitious plans to boost renewable energy generation have seen a number of projects gain approval or funding over 2011, and such moves have triggered additional international interest from firms keen to invest in Mexico's energy sector. These include Australia's Macquaries Group's plans to begin constructing the Mareña Renovables wind power plant in Oaxaca state in late 2011 (the Inter-American Development Bank will provide up to US\$72mn in funding) and China's Risen Energy's agreement with Durango's state government to construct a solar power plant. In addition, the Federal Electricity Commission (CFE) has pushed forward the start date for the work on La Yesca hydroelectric plant, with an aim for it to produce electricity for the grid by late 2016.

But Mexico has also made advances in non-renewables, with key examples being the US\$440mn contract awarded to Spanish firm Abengoa to construct a 640MW combined cycle gas power plant in December 2011, and the news that General Electric will provide six gas turbines to repower the Manzanillo thermoelectric plant.

BMI's extended forecasts calculate that during the period 2011-2016, Mexico's overall power generation will increase by an annual average of 3.06%, reaching 305.38TWh. Driving this growth are average annual gains of just under 4% in gas-fired, hydro and renewables-based generation.

BMI estimates that real GDP grew by 3.75% in 2011, and we forecast average annual growth of 2.6% between 2011 and 2021. The population is expected to rise from the current level of 114.8mn to 127mn during the period 2011-2021, and net power consumption looks set to increase from 213TWh in 2011 to 245TWh by 2016, rising further to 279TWh by 2021. During the period 2011-2016, the average annual growth rate for electricity demand is forecast at 3.1%, which will slow somewhat later in the decade to an average 2.6% in 2016-2021. The theoretical net export capability by 2016 is put at 8.9TWh, which could be no more than 7.5Wh by 2021.

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