

# Mexico Renewables Report Q4 2016

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## Abstracts

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**BMI View:** Our optimistic outlook for Mexico's non-hydro renewables industry is underpinned by the country's strong commitment to developing renewable energy sources, large project pipeline and sound industry fundamentals. Growth will be driven primarily by the wind and solar sectors, with smaller contributions coming from geothermal and biomass projects. We note that continuously declining electricity prices in Mexico present a downside risk to our forecasts, as they may gradually erode renewables' competitiveness relative to traditional thermal generation sources.

### Latest Updates And Structural Trends

This quarter, we have maintained our forecasts for Mexico's non-hydro renewables industry. Supported by strong industry and country-specific fundamentals, we forecast non-hydro renewables capacity to average 15.5% growth during 2016-2025, reaching a total of 18.6GW. By 2025, we believe non-hydro renewables' share in the country's total generation capacity will reach 10.4%, up from 4.2%.

We hold our view that wind power will be the technology of choice in Mexico's non-hydro renewables industry. The wind sector is set to grow at the fastest pace (in absolute terms) over the coming decade, accounting for more than 58% of total non-hydro renewables generation and nearly 72% of total capacity by 2025.

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