

Peru Power Report Q1 2016

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Abstracts

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BMI View: We maintain our positive outlook for Peru's power sector over the coming decade, based on strong growth in power consumption, government tenders for power generation and transmissions projects, and robust investor interest in the market. Growth in electricity generation will come primarily from by additional hydropower and natural gas-fired projects, but we also expect to see increasing investment in the solar and wind power sectors as a result of a new renewables-specific energy auction. Delays to project implementation are the main risk to our upbeat growth forecasts for this market.

Latest Updates And Structural Trends

We expect significant participation from international and domestic firms in Peru's new energy auction for up to 1,750 gigawatt hours (GWh) of energy a year, distributed between solar, wind, biomass and small hydropower projects. The tender was launched in September 2015, with 20-year power purchase agreements scheduled to be awarded in January 2016 and plants to come online by December 2018.

While we reiterate non-hydropower renewables will play only a minor role in the Peruvian power mix over the coming years, the auction confirms our view that the sector will offer business opportunities. Major international developers such as Enel Green Power and SunEdison have shown interest in investing in the market through the auction.

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