

# Peru Power Report Q2 2016

<https://marketpublishers.com/r/PEB55D783C2EN.html>

Date: March 2016

Pages: 57

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

ID: PEB55D783C2EN

## Abstracts

**BMI View:** Strong growth in electricity consumption, government tenders for power generation and transmissions projects, and robust investor interest in the market continue to support our positive outlook for the Peruvian power sector. We upgraded our forecasts for Peru's renewables as a result of a successful energy tender in February 2016, but future opportunities in the market will be limited by strong growth in hydropower and gas-fired power plants. Delays in project tendering and implementation are the main risks to our upbeat growth forecasts for the Peruvian power sector.

### Latest Updates And Structural Trends

In February 2016, Osinergmin (the Peruvian public agency responsible for supervising investment in energy and mining) awarded 20-year power purchase agreements (PPAs) for a total of 1,792.2 gigawatt hours (GWh) per year, distributed among 13 renewables projects. Italy's Enel Green Power (EGP) secured contracts for the majority of the energy on offer; EGP obtained PPAs for three renewable energy schemes, involving 126MW of wind power, 180MW of solar photovoltaic power and 20MW of hydropower.

We have revised up our renewables power capacity and generation forecasts accordingly, but we maintain that non-hydropower renewable energy will play only a minor role in the Peruvian electricity mix over the coming decade - due to greater growth in hydropower and natural gas-fired power generation. Peru's National Energy Plan does not include provisions for growth in non-hydro renewables beyond its target of having 5% of total electricity produced by non-hydro resources by 2018, which will be reached via the auction. As such - barring the launch of a new renewable energy tender in the future - we expect only limited demand for utility-level renewables in Peru, driven mainly by PPAs with the mining sector.



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