



Puebla

August, 2021

Power sector analysis at a regional level



Generation

Puebla has **1,430 MW of capacity in operation** and is expected to develop another 973 MW in the near future. By June 2021, there were **56 Generation Permit Holders** in the state, of which 78% are projects that resulted from the Electric Industry Law (LIE) in 2014 and 22% are Legacy Projects, based on their authorized capacity. Of the total generation projects, 715 MW or 30% correspond to CFE plants.

Figure 1: Capacity in Operation

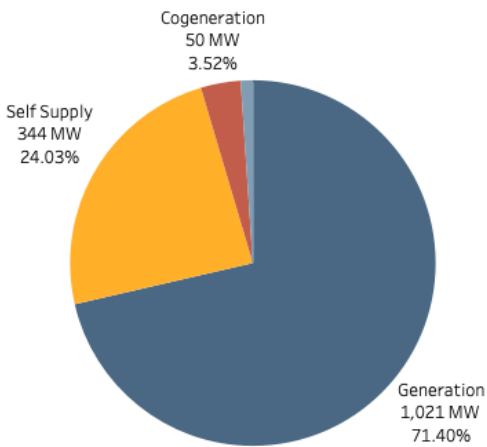


Figure 2: Authorized Capacity

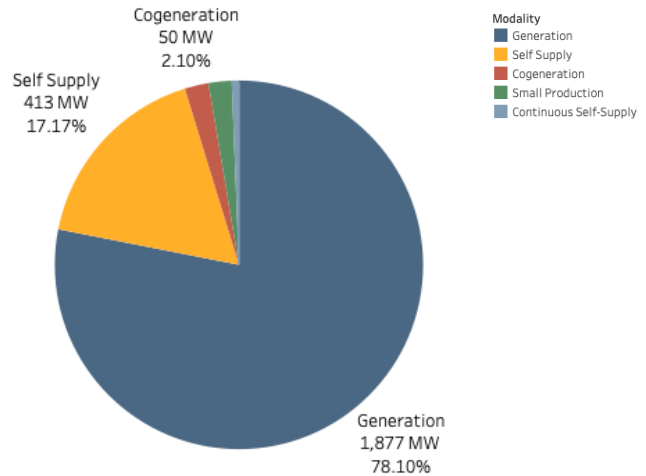
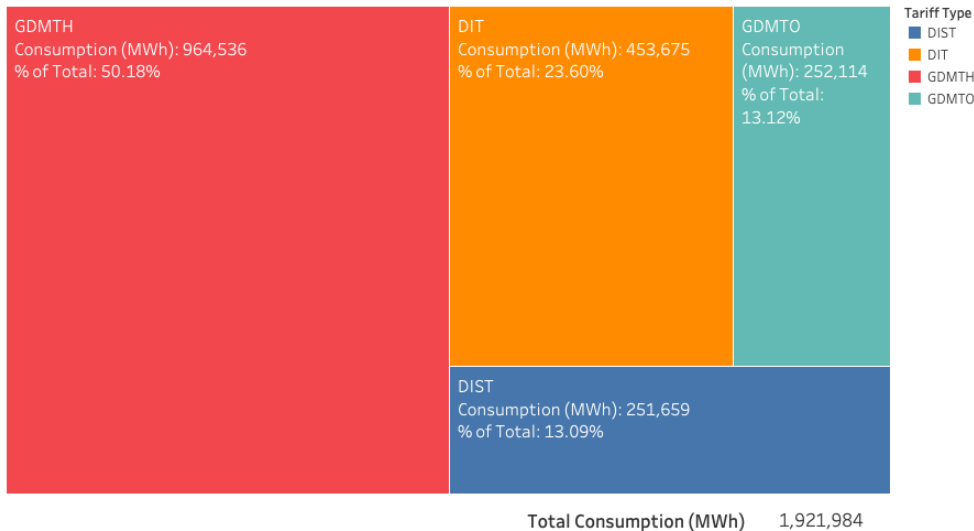


Figure 3: CFE SSB Consumption Jan 2021 - June 2021



Demand - Basic Service Users



When analyzing CFE SSB C&I users, Puebla ranks as the **12th** state with regard to its **average consumption (MWh)** in the country.



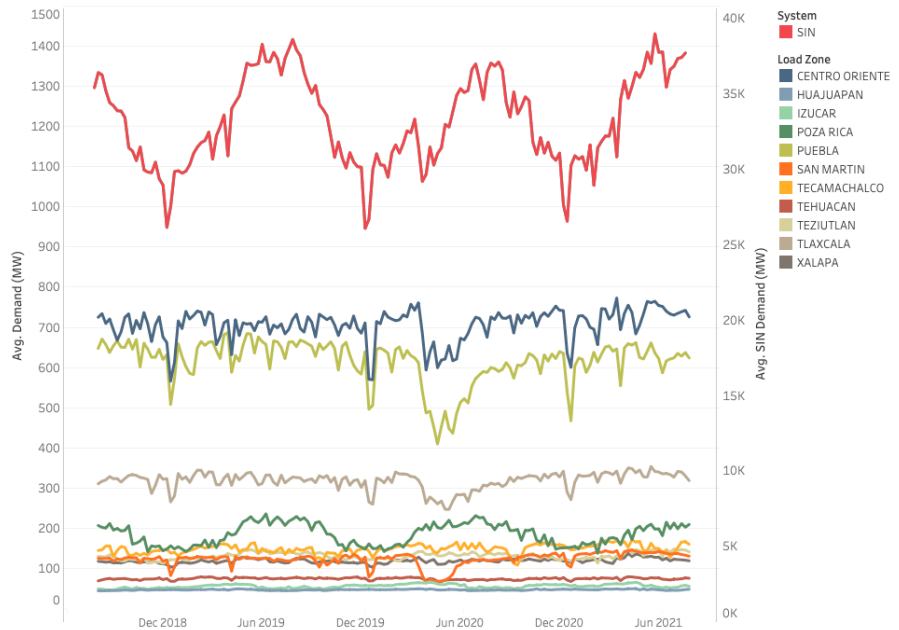
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Demand - MEM

The following graph shows the historic behavior of demand in the SIN (National Interconnected System), which peaks in the summer and reaches its lowest level in the winter. Similar to the behavior in the SIN, Puebla's load zones show significant fluctuations in their demand throughout the year. In sum Puebla's load zones represented **7.17% of the total demand in the SIN** from January to August 2021.

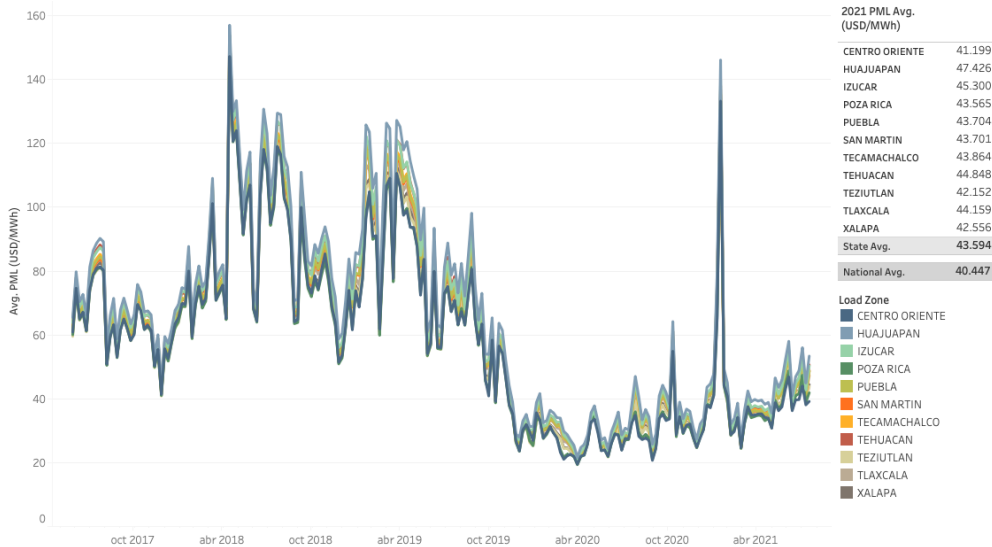
Figure 4: Historic SIN Demand



Prices - PML

During 2021, the Local Marginal Prices (PML) have shown values slightly above those observed in 2020, showing an upwards trend in recent months. The peak in early February was caused by a gas shortage in the South of the US. From January to August 2021, Puebla had a PML above the national average with a value of **43.594 USD/MWh**.

Figure 5: Historic PML Behavior





Puebla

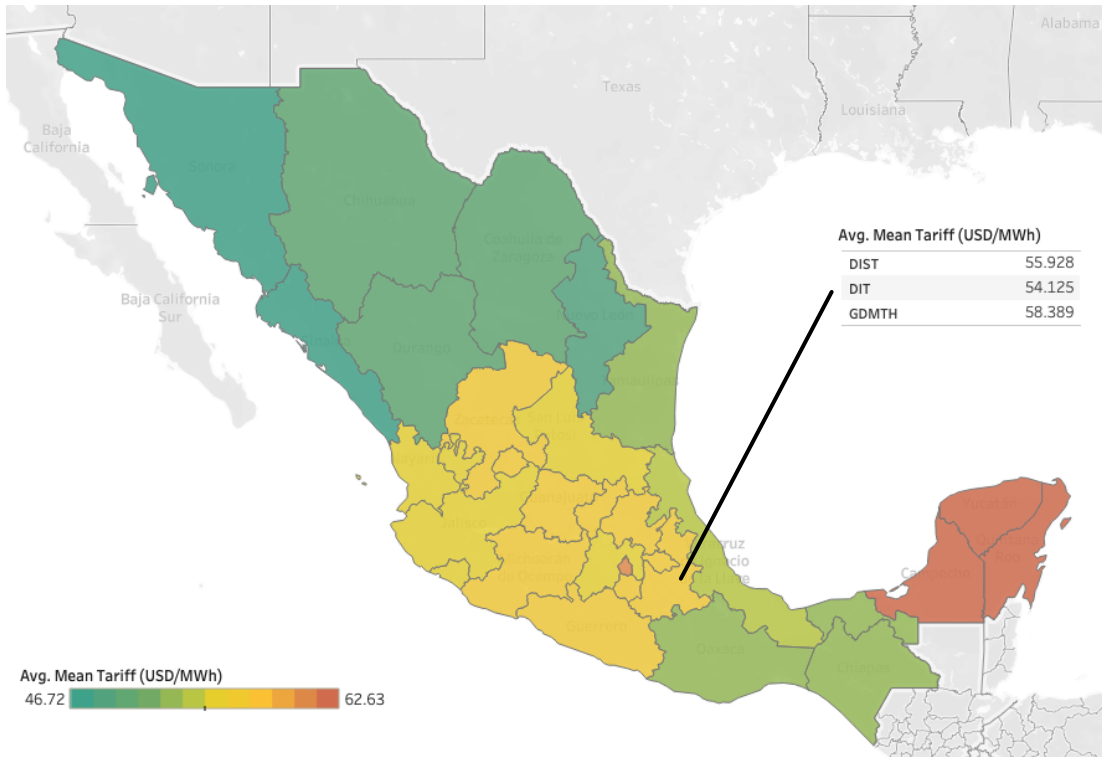
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Prices - CFE SSB Tariffs

The following graph shows the average tariff of the variable energy component that CFE SSB has charged to its large-scale and industrial users (GDMTH, DIT and DIST) throughout 2021. Across the country, this rate has increased 5.4% from January to April 2021, reaching values seen at the beginning of 2020. During 2021, Puebla ranked as the 16th state with the highest average tariff.¹

Figure 6: 2021 CFE SSB Tariffs



¹ Note that Baja California and Baja California Sur have been omitted to allow for better visualization of the rest of the map as they present the lowest (21.87 USD/MWh) and highest (96.09 USD/MWh) average tariffs in the country, respectively.