



## Puebla December, 2021

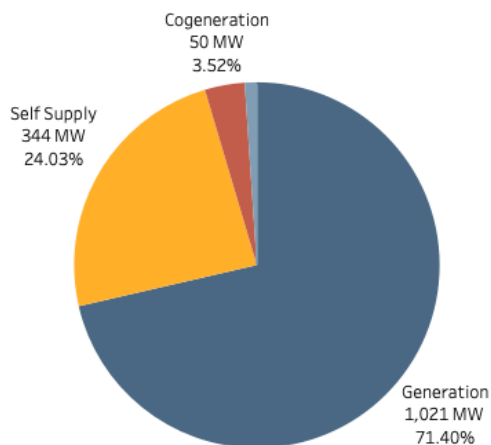
### Power sector analysis at a regional level



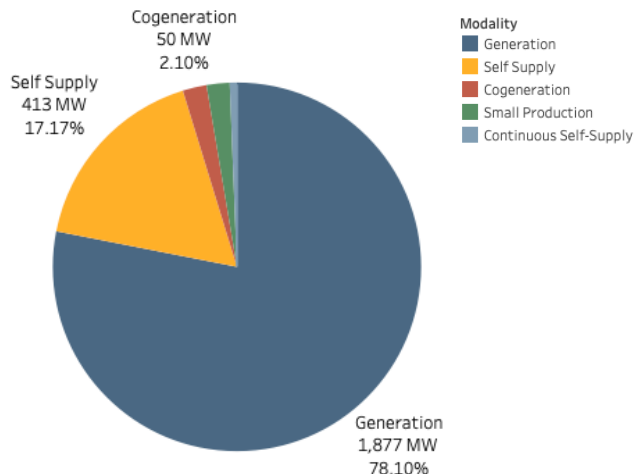
#### Generation

Puebla has **1,430 MW of capacity in operation** and is expected to develop another 973 MW in the near future. By November 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**

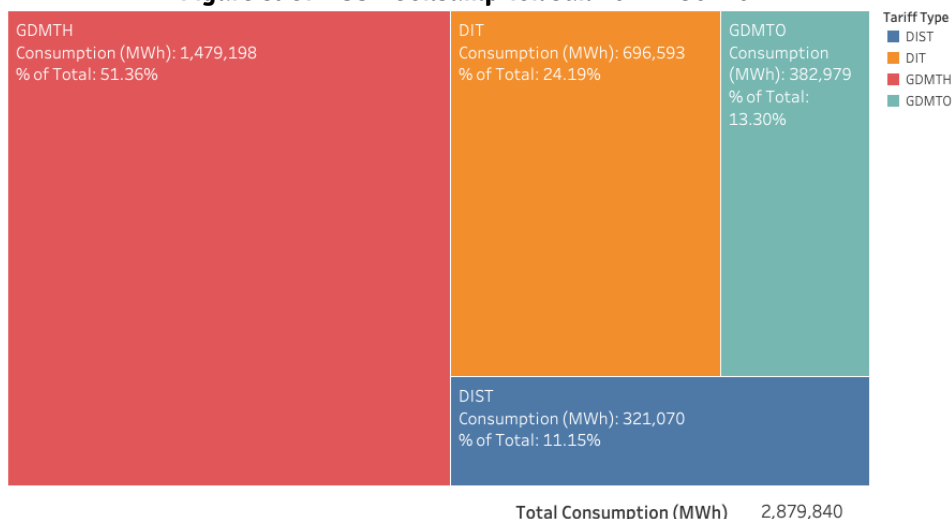


**Figure 2: Authorized Capacity**



Source: Comisión Reguladora de Energía (CRE)

**Figure 3: CFE SSB Consumption Jan 2021 - Oct 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.

Source: Comisión Federal de Electricidad (CFE)



# Puebla

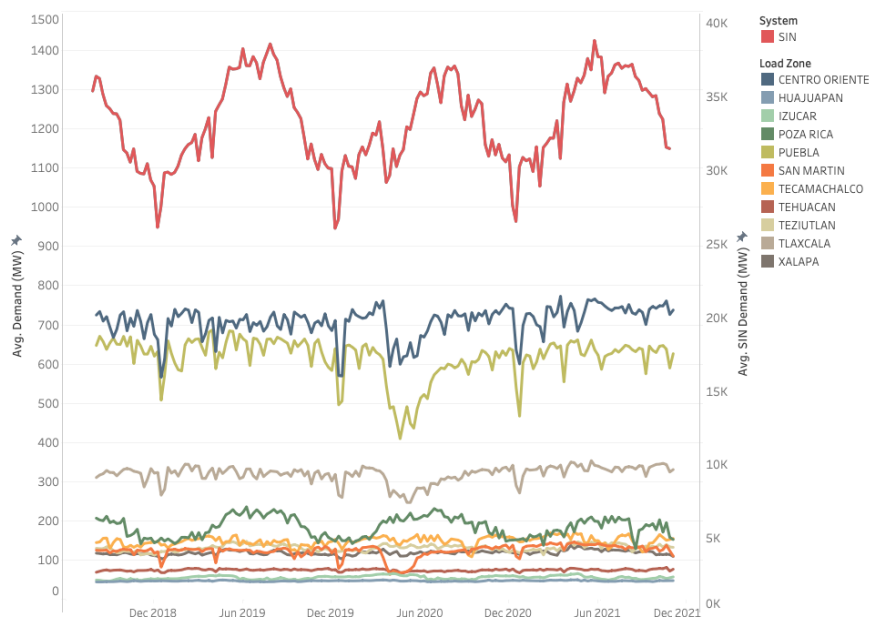
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### Demand - MEM

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 **7.08% of the total demand in the SIN** from January to November 2021.

Figure 4: Historic SIN Demand



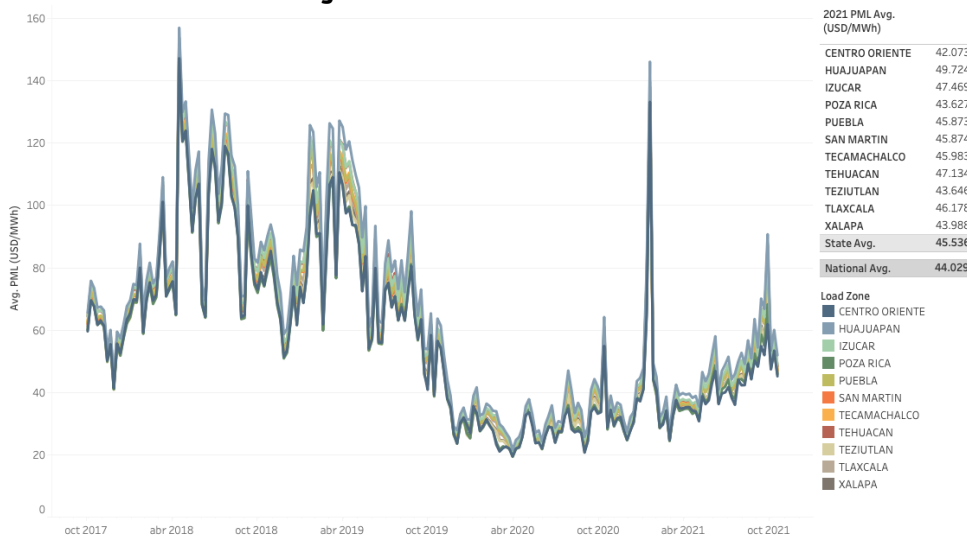
Source: Centro Nacional de Control de Energía (CENACE)



### 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, mainly due to the increasing natural gas prices. The peak in early February was caused by a gas shortage in the South of the US. From January to November 2021, Puebla had a PML above the national average with a value of **45.536 USD/MWh**, the following graph shows the PML in Puebla's load zones.

Figure 5: Historic PML Behavior



Source: Centro Nacional de Control de Energía (CENACE)



## Puebla

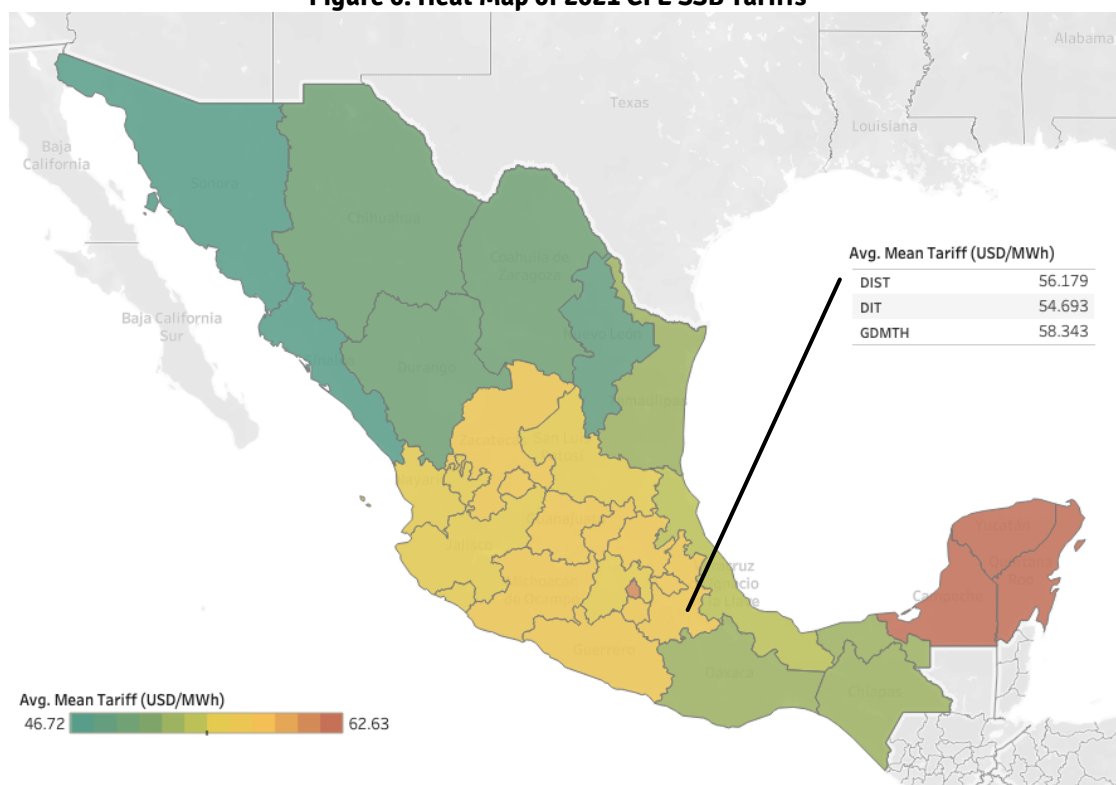
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### Prices - CFE SSB Tariffs

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 3.64% from January to September 2021. During 2021, Puebla ranked as the **13th state with the highest average tariff**<sup>1</sup>, this value is an average of the rates in the Tariff Divisions of the state: Centro Oriente, Centro Sur, Golfo Centro and Oriente.

**Figure 6: Heat Map of 2021 CFE SSB Tariffs**



Source: Comisión Federal de Electricidad (CFE)

#### About the CFE Tariffs:

**Industrial demand in transmission (DIT):** users supplied with high voltage at the transmission level (>220 kv) and who, due to their high demand, request to register as users under this rate.

**Industrial Subtransmission Demand (DIST):** users supplied with high voltage at the subtransmission (<220 kv) level and who, due to their high demand, request to register as users under this rate.

**Great Demand in Hourly Medium Voltage (GDMTH):** users supplied in medium voltage, with a demand equal to or greater than 100 KW.

<sup>1</sup> 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 (23.50 USD/MWh) and highest (98.11 USD/MWh) average tariffs in the country, respectively.