Mexico Electric Power Sector Reform: The Role of Natural Gas

2016 UT Energy Week

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Editor ICIS Mexico Energy Report
Leading price provider for European gas and power markets; benchmarks for most liquid European markets such as NBP and TTF.

Largest and most specialized LNG market reporting team.

Covering US carbon market since 2013.

## New supplies to Mexico: pipeline imports

### California
- **2013:** 0.8 bcf/day
- **2014:** 0.8 bcf/day
- **2020:** 1 bcf/day

### Arizona
- **2013:** 0.45 bcf/day
- **2014:** 0.7 bcf/day
- **2020:** 0.9 bcf/day

### Texas
- **2013:** 2.9 bcf/day
- **2014:** 5 bcf/day
- **2020:** 11-12 bcf/day

### Manzanillo
- LNG 0.5 bcf/day

### Altamira
- LNG 0.5 bcf/day

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*Source: EIA, ICIS*
Demand and imports set to continue growing

Gas demand by sector 2015-2027

Source: SENER

Gas supply by source 2015-2029

Source: SENER

Oil and Gas
Industrial
Residential + Other

Total national demand
Natural gas imports
Thank you!

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