



Yucatán

April, 2021

Power sector analysis at a regional level



Generation

Yucatán has 2,418 MW of authorized capacity in operation and is expected to develop another 1,222 MW in the near future. By November 2020, there were **36 generation permit holders** in the state, of which 66% are projects that resulted from the Electric Industry Law (LIE) in 2014 and 34% are Legacy Projects, based on their authorized capacity. Of the total generation projects 1,083 MW or 30% correspond to CFE plants.

Figure 1: Capacity in Operation

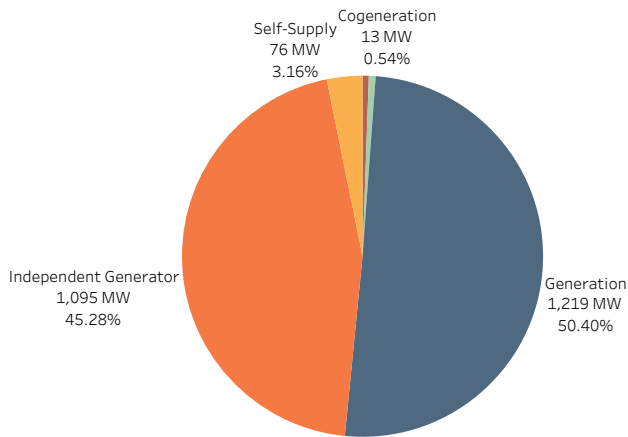


Figure 2: Authorized Capacity

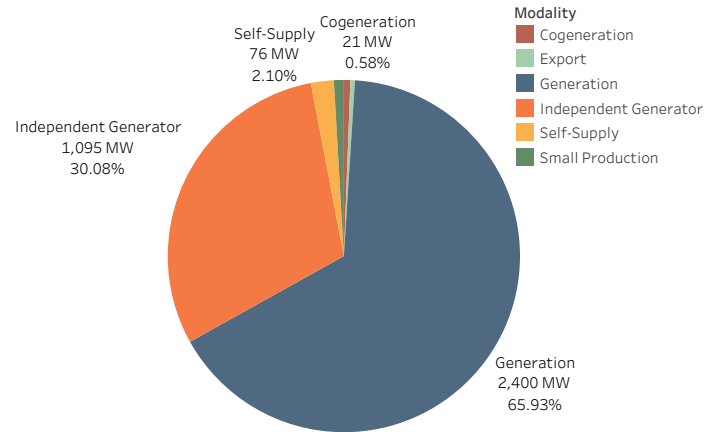
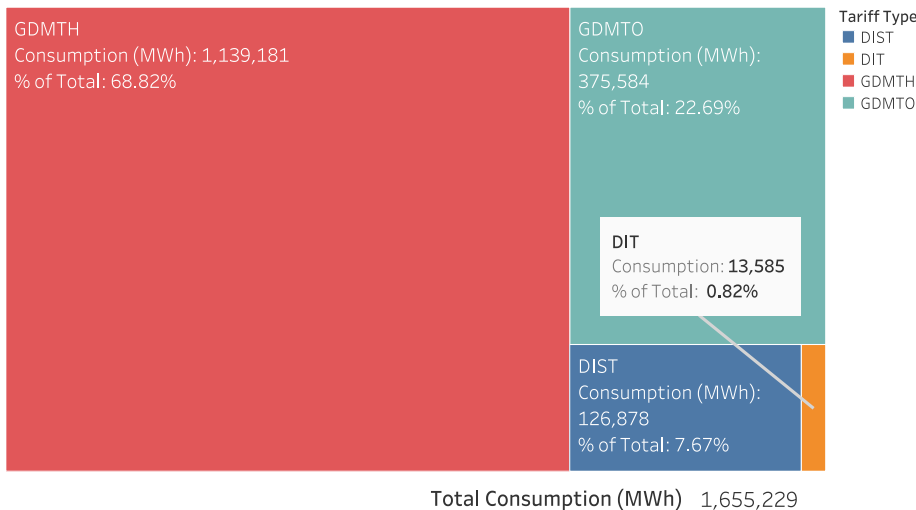


Figure 3: CFE SSB Consumption Jan 2020 - Jan 2021



Demand - Basic Service Users



When analyzing CFE SSB C&I users, Yucatán ranks as the **21st** state with regard to its average consumption (MWh).



Yucatán

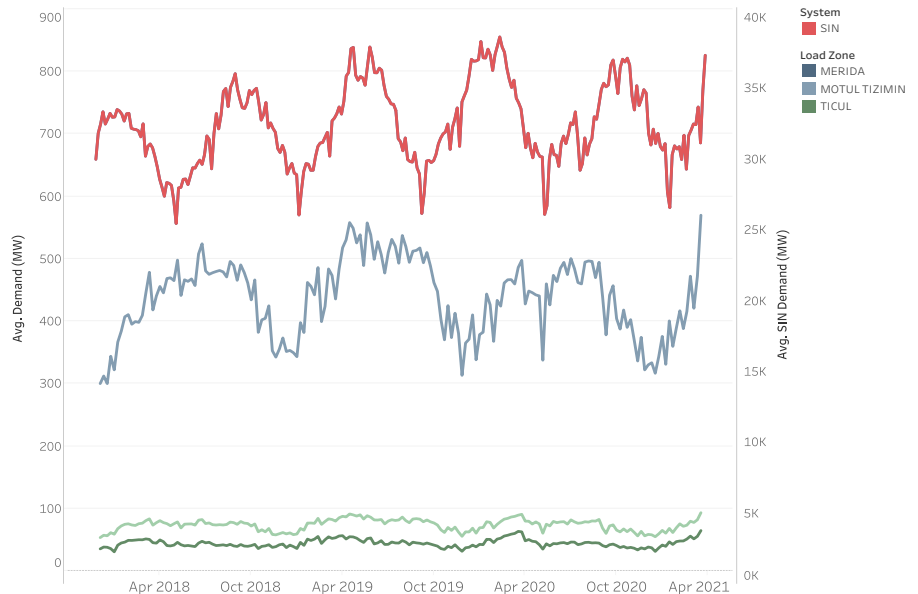
April, 2021



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. Yucatán has 3 load zones of which one (Merida) makes up the bulk of the demand in the state, the state's load zones behave differently than the SIN. In sum, Yucatán's load zones represented 1.52% of the total demand in the SIN from January to April 2021.

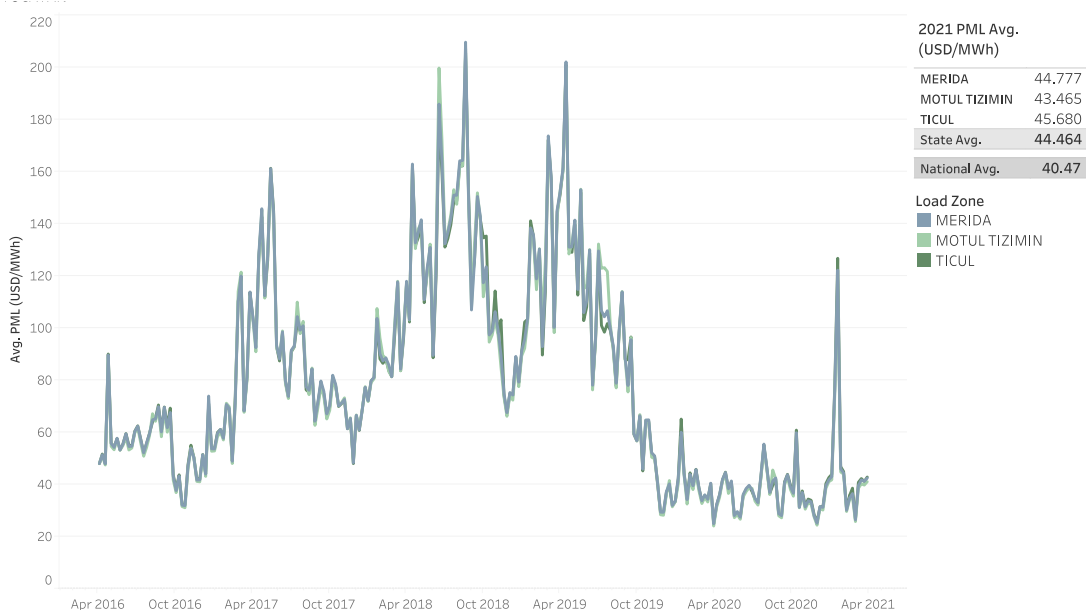
Figure 4: Historic SIN Demand



Prices - PML

During 2021, the Local Marginal Prices (PML) have shown similar values to those observed in 2020, excluding a peak in early February caused by a gas shortage in the South of the US. In the load zones within Yucatán, the PML has shown superior values to the nationwide average that started to recover during recent months. From January to April 2021, Yucatán had a PML above the national average with a value of 44.46 USD/MWh.

Figure 5: Historic PML Behavior





Yucatán

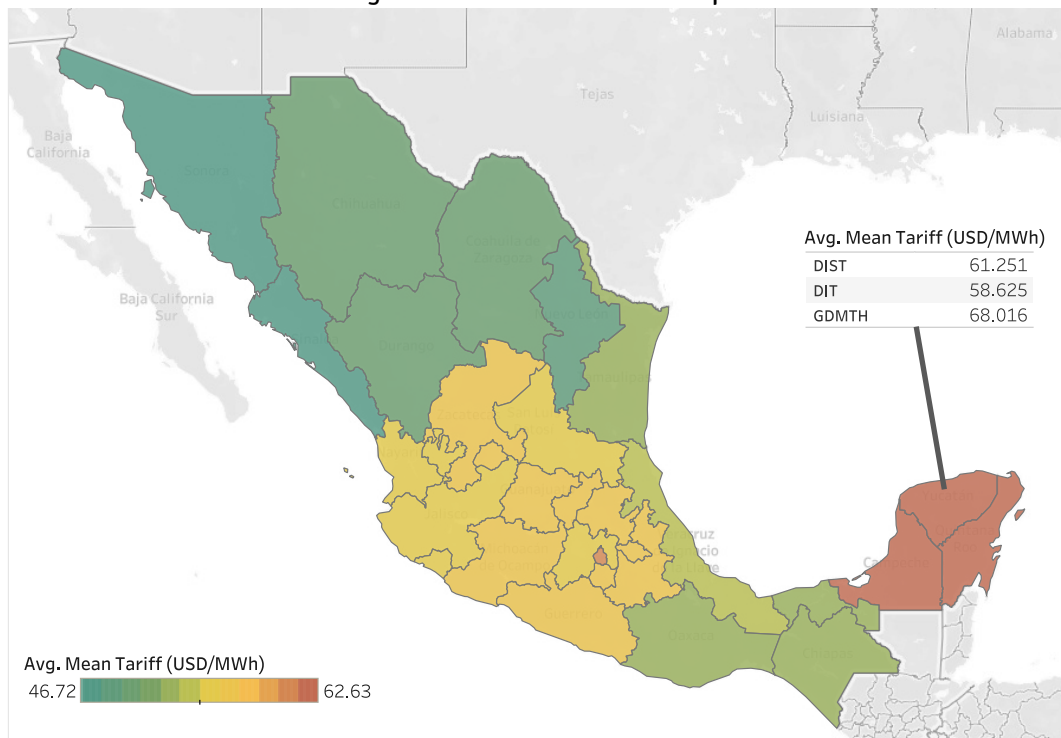
April, 2021



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 decreased by approximately 3.2% from 2020 to 2021. During 2021, Yucatán has **ranked as the 3rd** state regarding its **average tariff**, making it one of the states with the highest electricity rates.¹

Figure 6: 2021 CFE SSB Heat Map



¹ Note that Baja California and Baja California Sur have been omitted to allow for a better visualization of the rest of the map as they present the lowest (27.94 USD/MWh) and highest (107.07 USD/MWh) average tariffs in the country, respectively. Considering this, Yucatan has the highest average tariffs in the SIN.