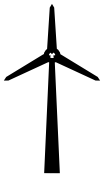




Nuevo León

April, 2021

Power sector analysis at a regional level



Generation

Nuevo León has **5,967 MW of capacity in operation** and is expected to develop another **3,014 MW** in the near future. By November 2020, there were **59 generation permit holders** in the state, of which **56%** are projects that resulted from the Electric Industry Law (LIE) in 2014 and **44%** are Legacy Projects, based on their authorized capacity. Of the total generation projects **1,073 MW or 12%** correspond to CFE plants.

Figure 1: Capacity in Operation

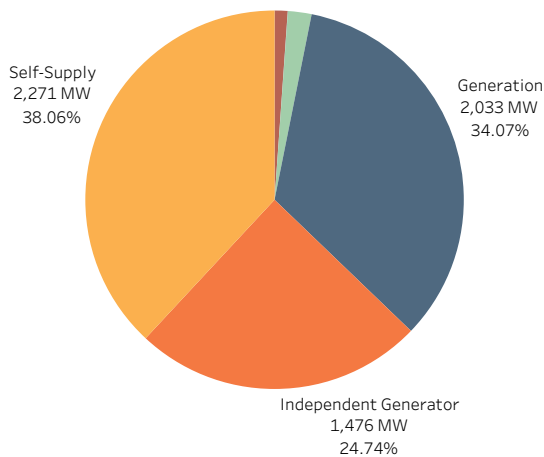


Figure 2: Authorized Capacity

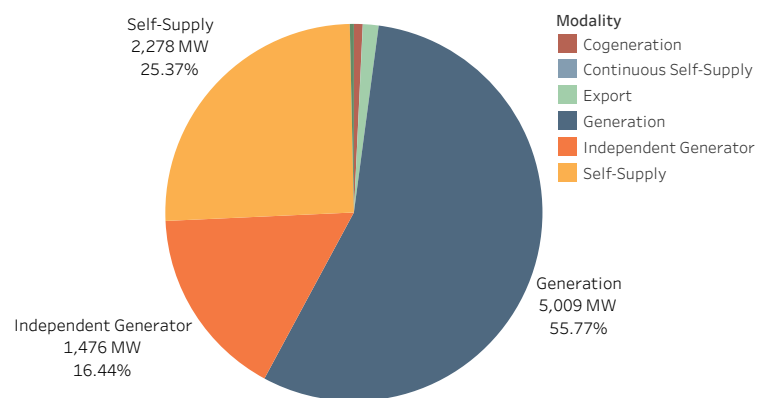
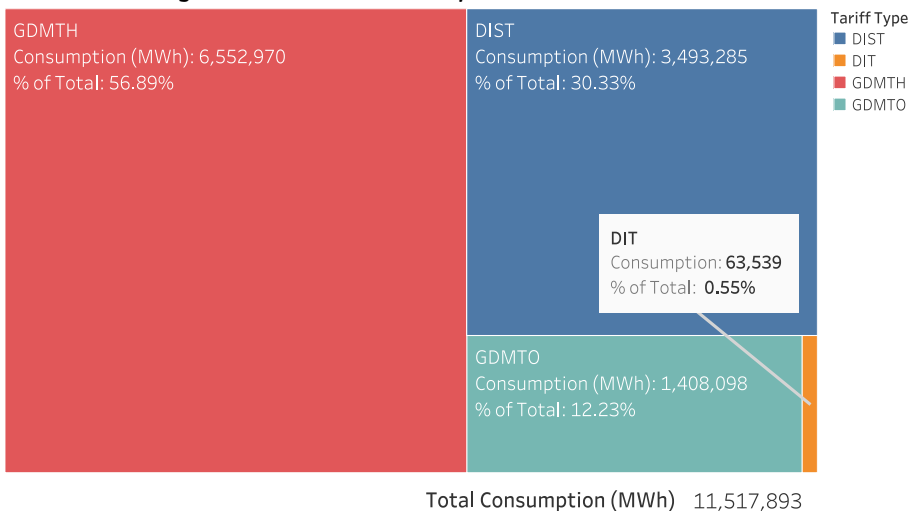


Figure 3: CFE SSB Consumption Jan 2020 – Jan 2021



Demand - Basic Service Users



When analyzing CFE SSB C&I users, Nuevo León ranks as the **1st** state with regard to its **average consumption (MWh)**.





Nuevo León

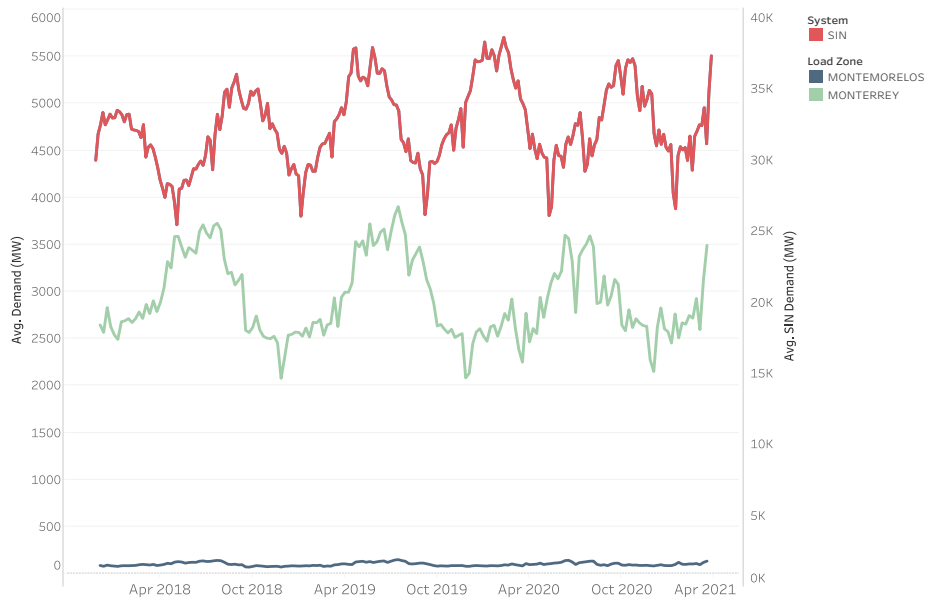
April, 2021



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. Nuevo León has two load zones, of which one (Monterrey) represents the bulk of the demand in the state. In sum, Nuevo León's load zones represented 8.43% of the total demand in the SIN from January to April 2021.

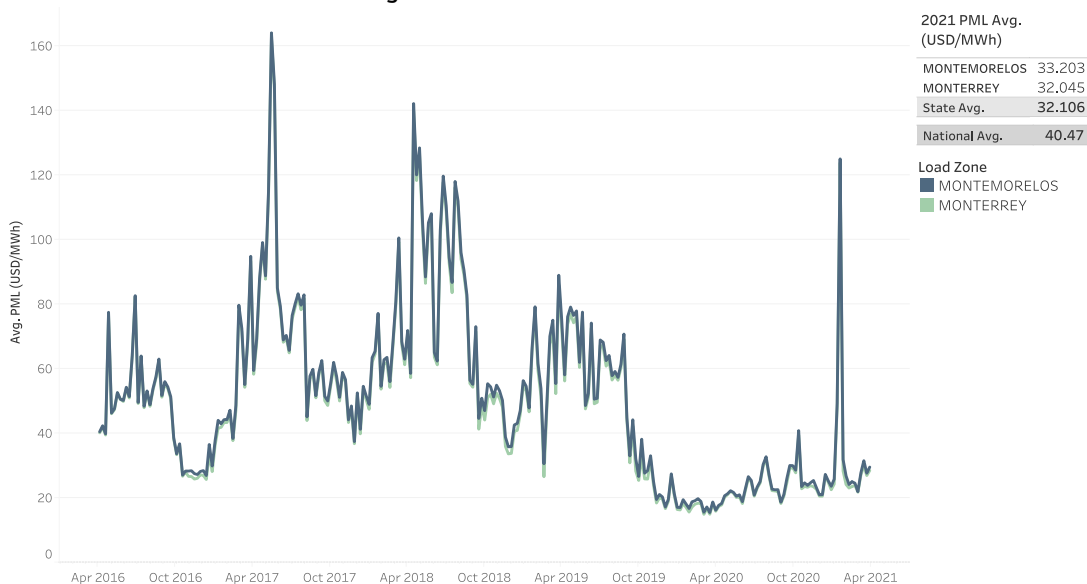
Figure 4: Historic SIN Demand



Prices - PML

During 2021, the Local Marginal Prices (PML) have shown similar prices 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 Nuevo León, the PML has shown inferior values to the nation-wide average that started to recover during recent months. From January to April 2021, Nuevo León had a PML below the national average with a value of 32.10 USD/MWh.

Figure 5: Historic PML Behavior





Nuevo León

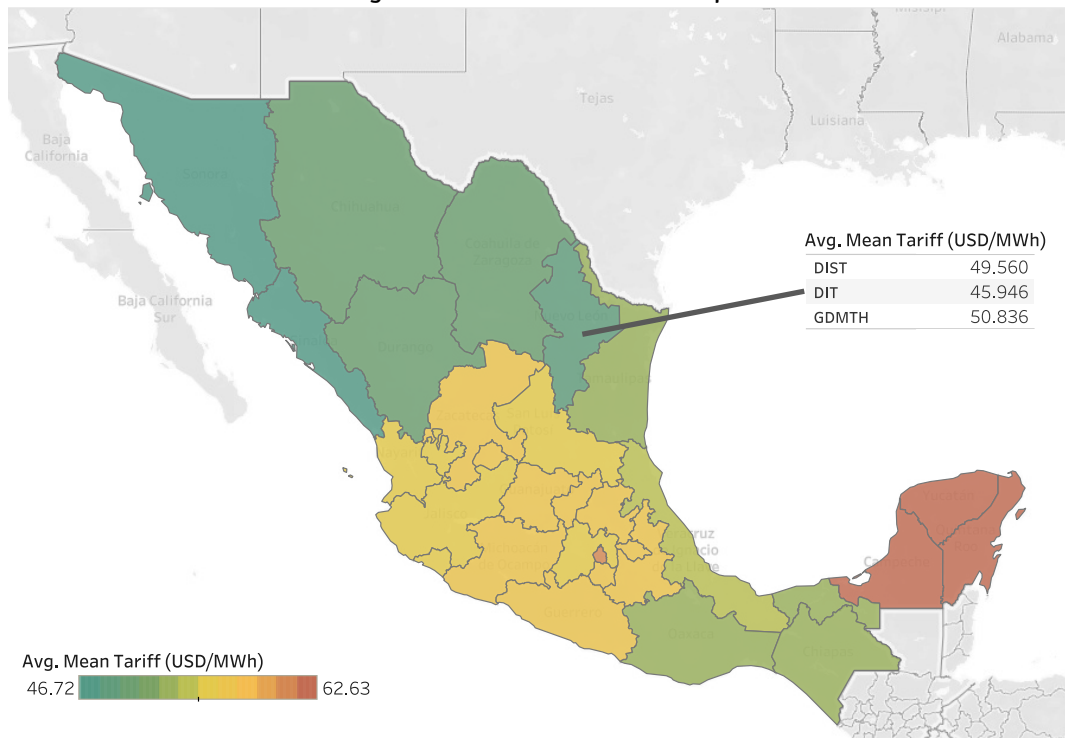
April, 2021



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, Nuevo León has ranked as the 30th state regarding its average tariff.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.

