

MEXICO ENERGY OUTLOOK

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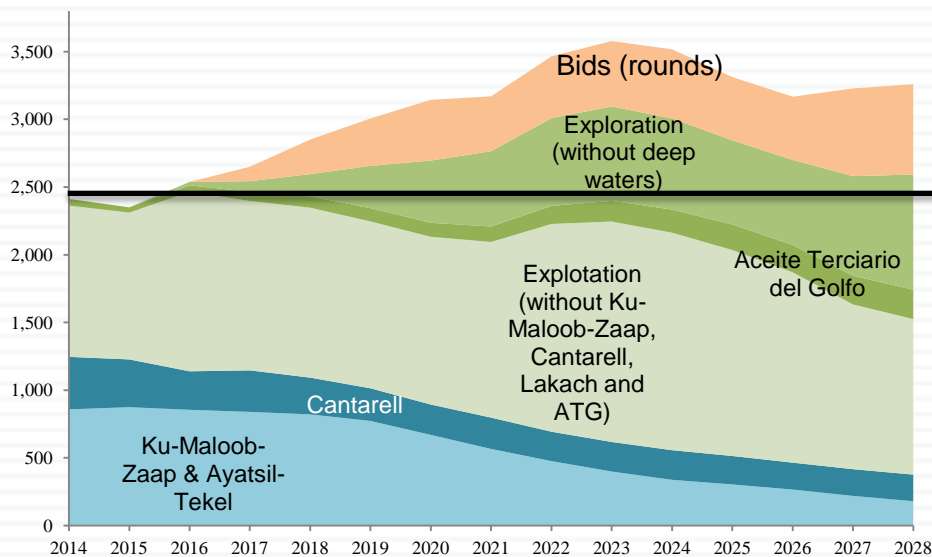
GENERAL DIRECTOR FOR ENERGY PLANNING AND INFORMATION

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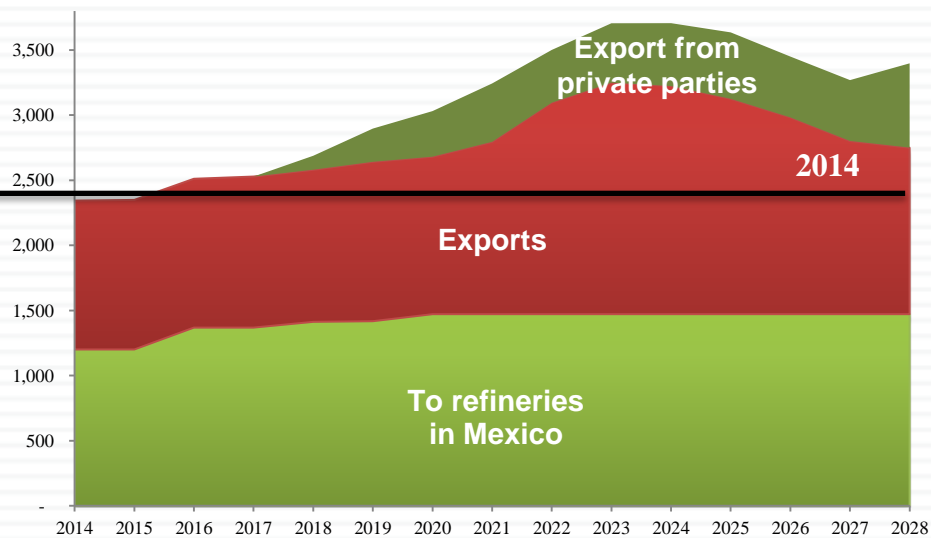


Crude oil production and exports are expected to increase as a result of the recent Energy Reform

Expected crude oil production (kbd)

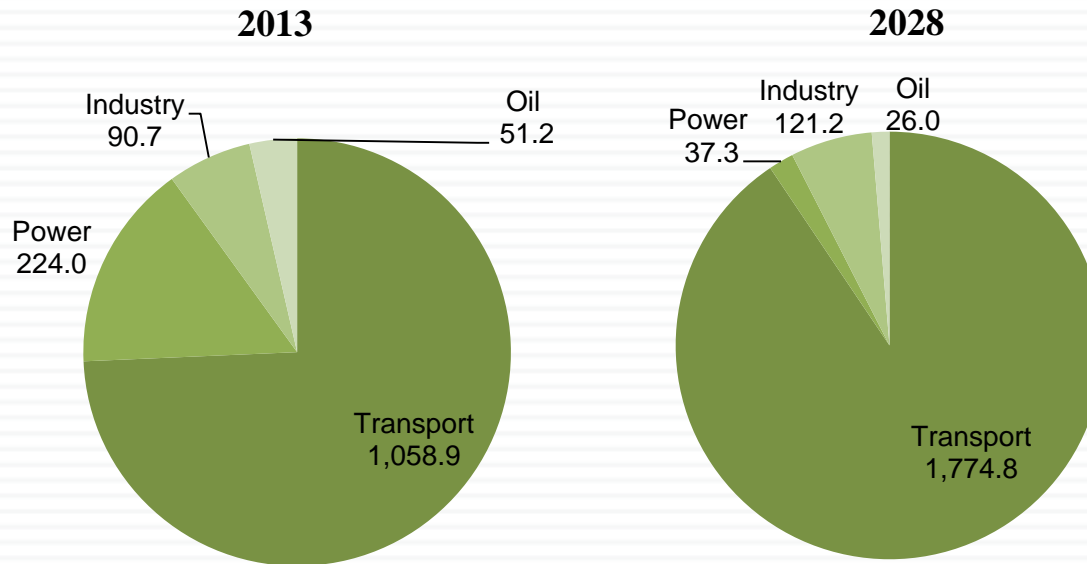


Expected crude oil exports (kbd)



Regarding oil demand, it is expected that transport sector will remain as the most important

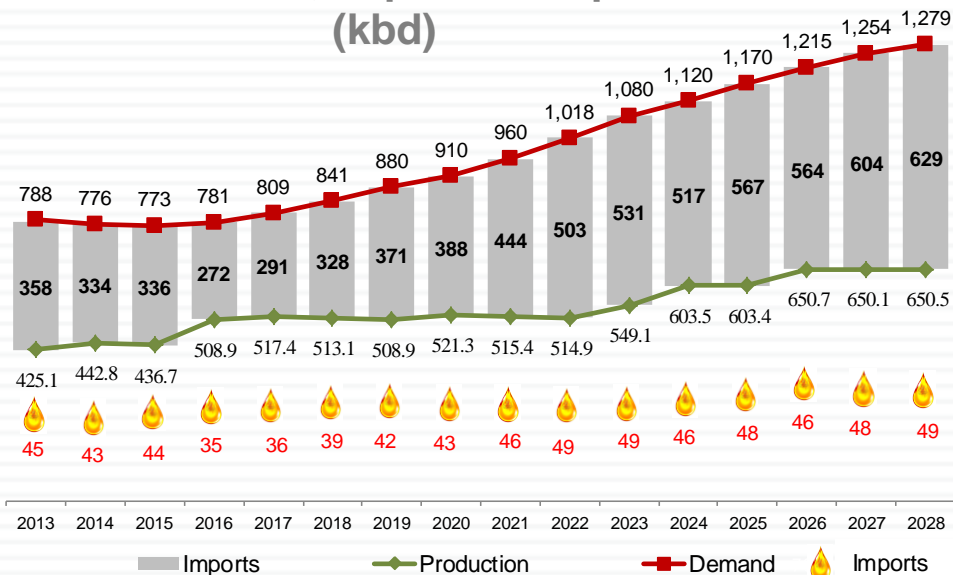
Petroleum products demand by Sector (kbd)



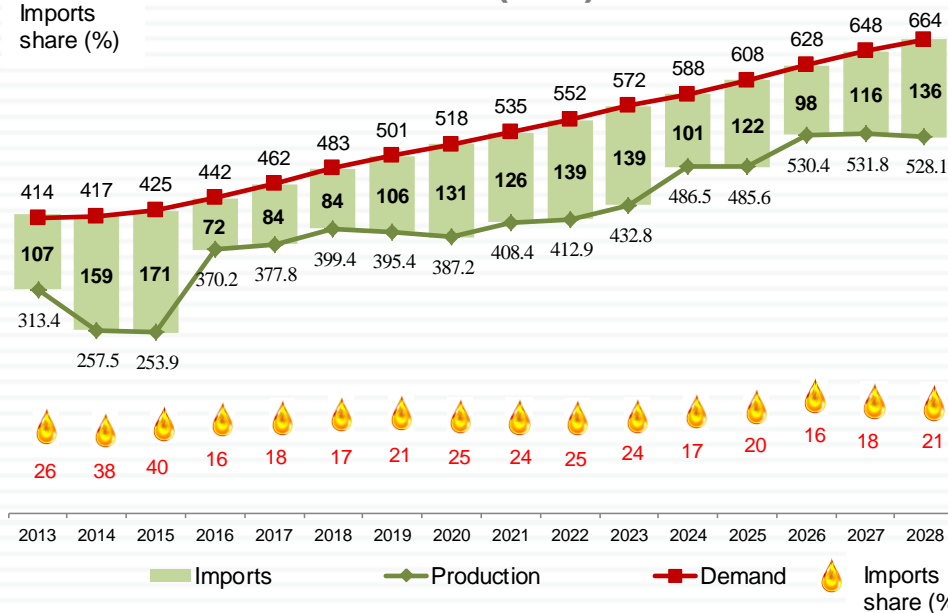
Where:	2013	2028
Transport sector	1,058.9	1,774.8
Automotive	972.2	1,612.7
Rail	12.7	25.3
Marine	13.8	20.8
Air	60.2	116.1
Power	224.0	37.3
Public generation	201.2	16.7
Private electricity generation	22.8	20.6

Gasoline and diesel demand, imports, and production keep on growing

Gasoline demand, imports and production (kbd)



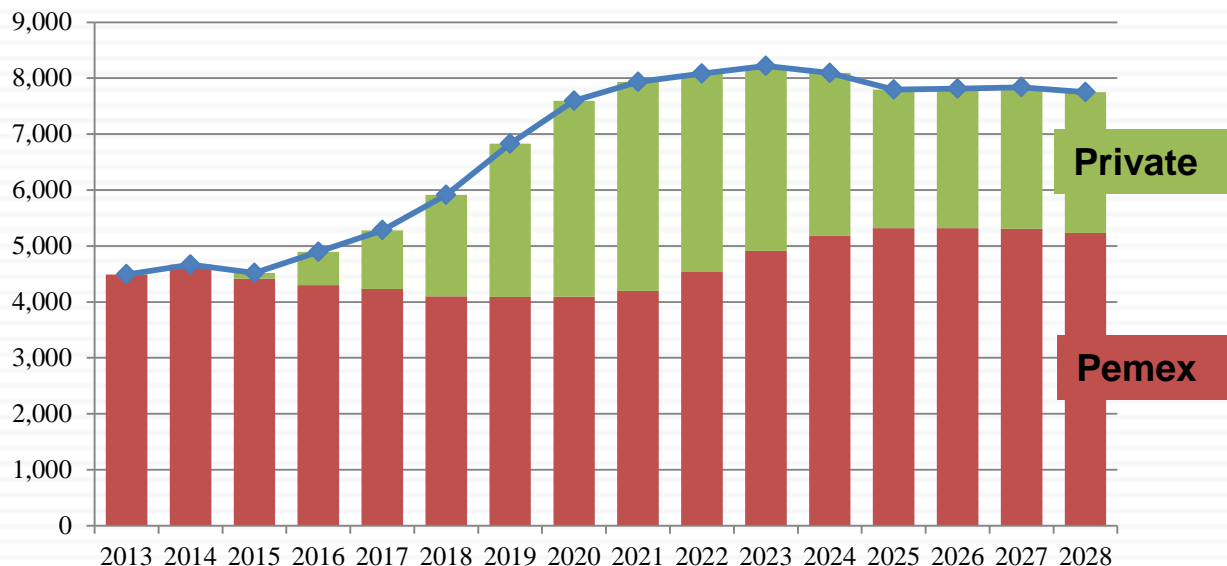
Diesel demand, imports and production (kbd)



Even with the additional coking capacity in the existing refineries, imports will raise due to demand increase.

Natural gas production and imports

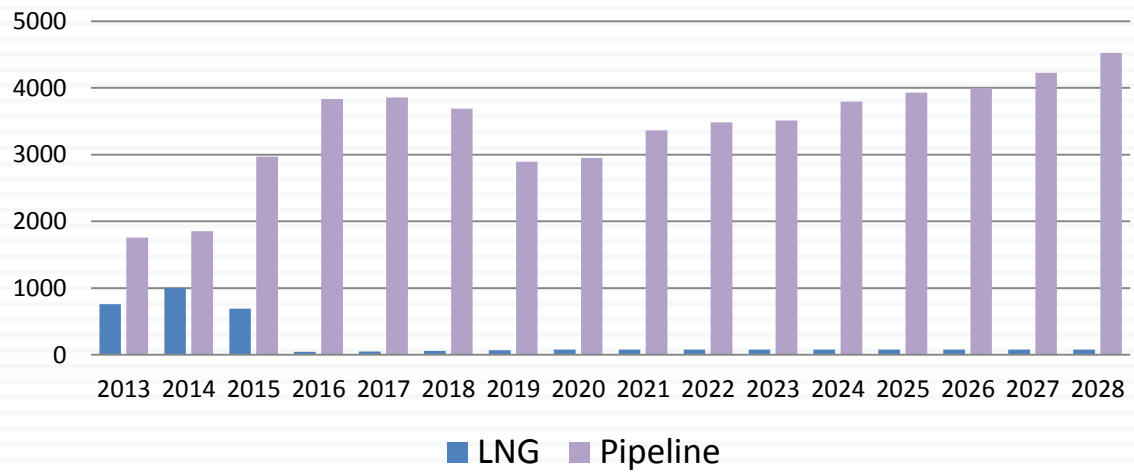
Natural gas production (mmcf/d)



In 2028, Pemex expected natural gas production will be 5,231 mmcf/d, and private parties will account 2,516 mmcf/d.

Natural gas imports by pipeline will increase from 1,756 mmcf/d in 2013 to 4,524 mmcf/d in 2028 (258%). LNG imports will decrease almost 90%.

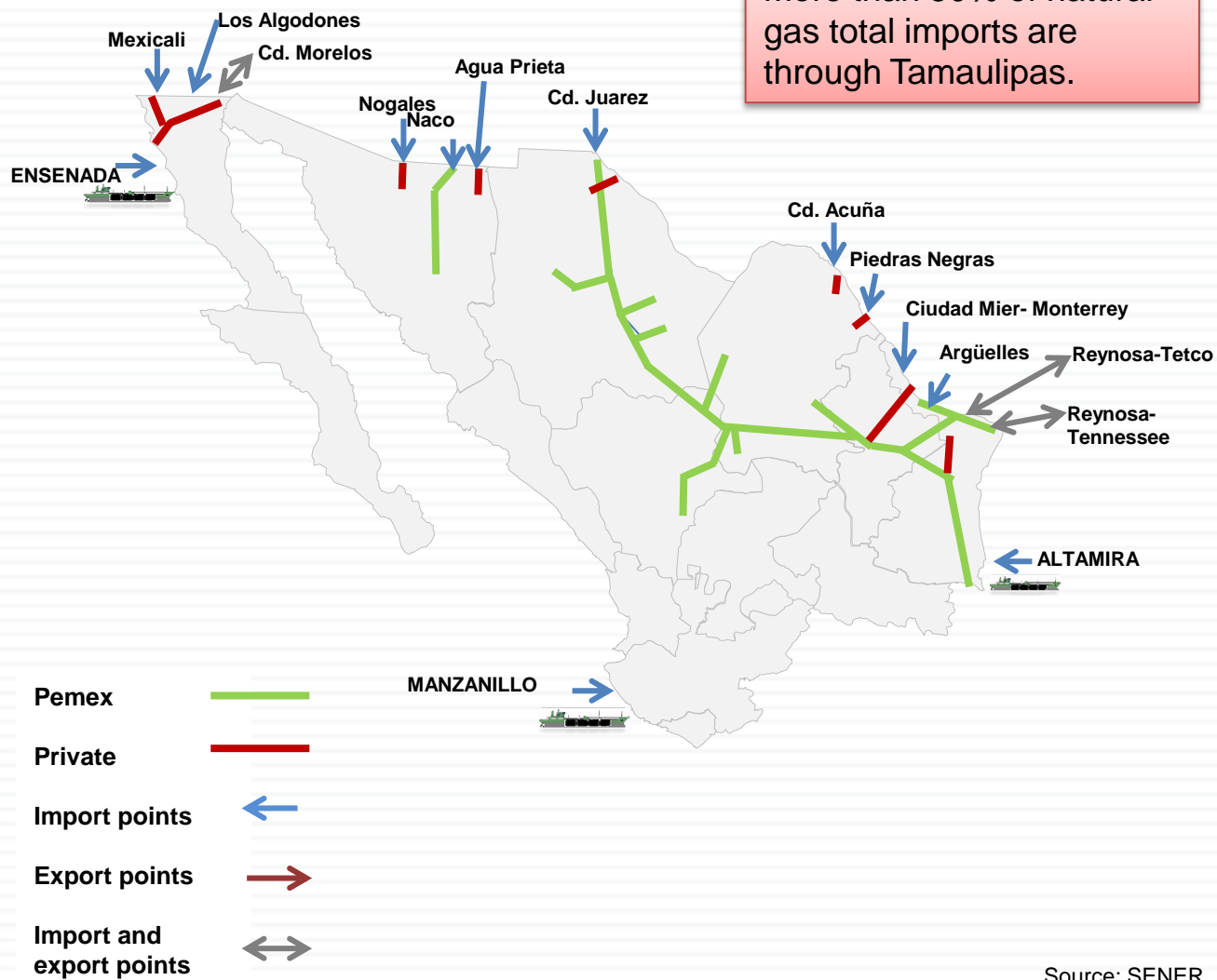
Natural gas imports (mmcf/d)



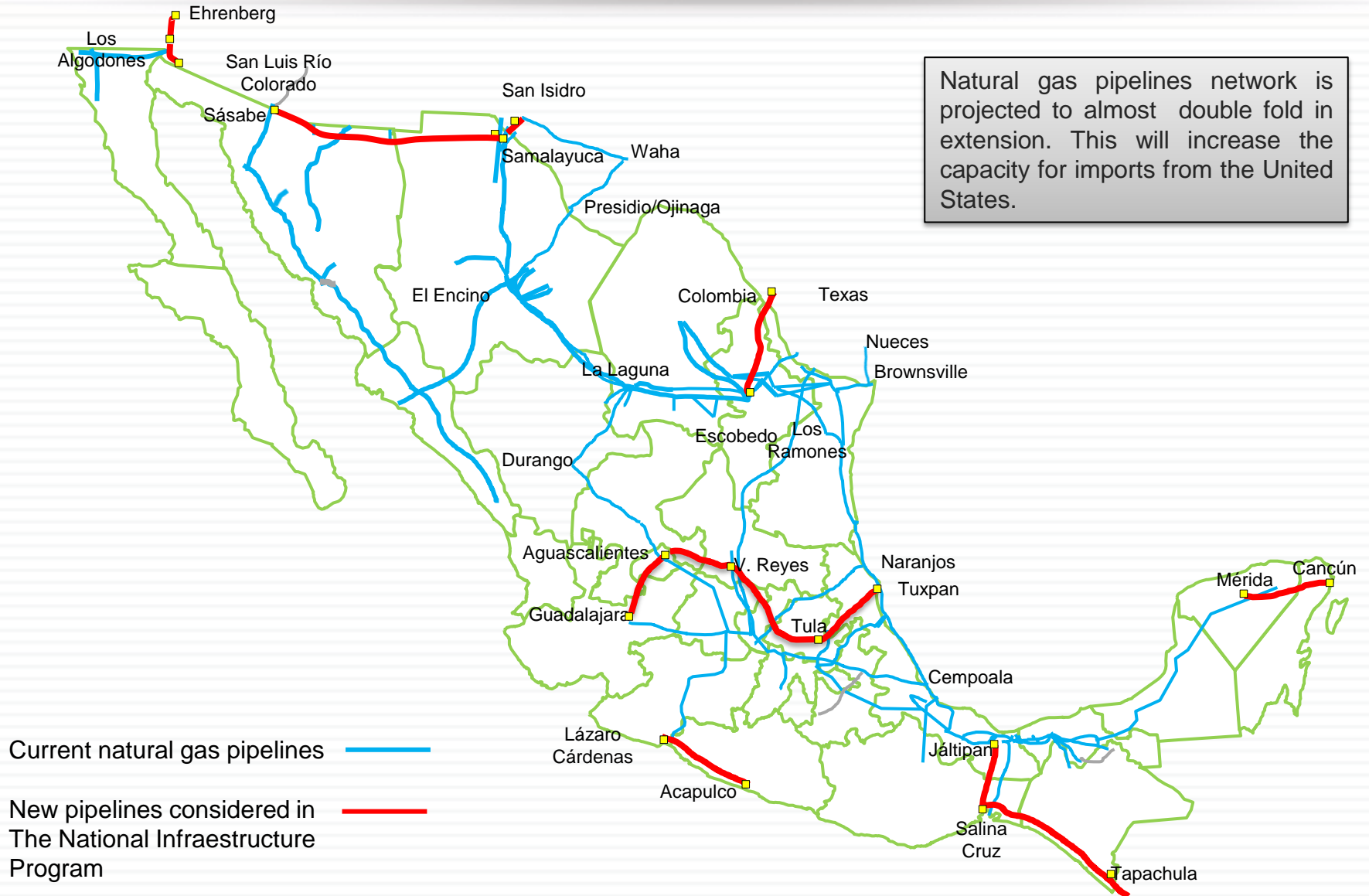
Natural Gas foreign commerce by interconnection points

More than 50% of natural gas total imports are through Tamaulipas.

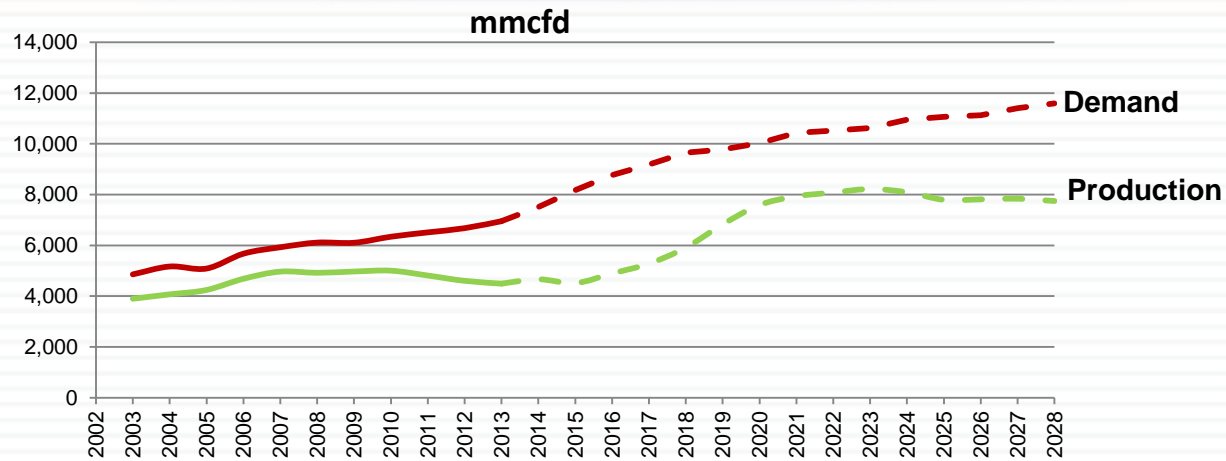
Interconnection points	2013
Total Imports	2,516.6
Imports by pipeline	1,755.5
1. Mexicali, BC.	21.3
2. Los Algodones, BC.	255.2
3. Nogales, Son.	0.9
4. Naco, Son.	72.5
5. Naco, Son.	44.6
6. Agua Prieta, Son.	11.4
7. Ciudad Juárez, Chih.	308.8
8. Ciudad Acuña, Coah.	1.2
9. Piedras Negras, Coah.	19.1
10. Ciudad Mier, Tamps.	370.5
11. Argüelles, Tamps. (Kinder Morgan)	208.9
12. Reynosa, Tamps. (Tetco)	24.7
13. Reynosa, Tamps. (Tennessee Gas, PMX)	202.0
14. Reynosa, Tamps. (Tennessee Gas, RB) ³	214.4
LNG Imports	761.1
16. Altamira, Tamps.	356.8
17. Ensenada, BC.	34.0
18. Manzanillo, Col.	370.3
Total exports	12.4
Ciudad Morelos, BC.	9.3
Reynosa, Tamps.	3.1



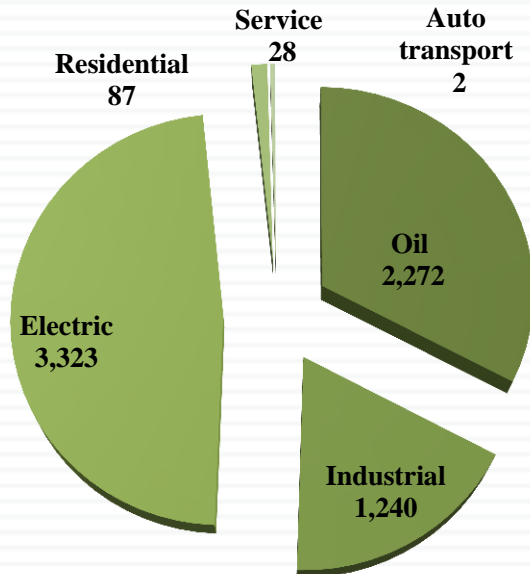
New infrastructure: Natural gas pipelines



Expected natural gas demand, 2028



Gas demand by consumption sector (mscfd)

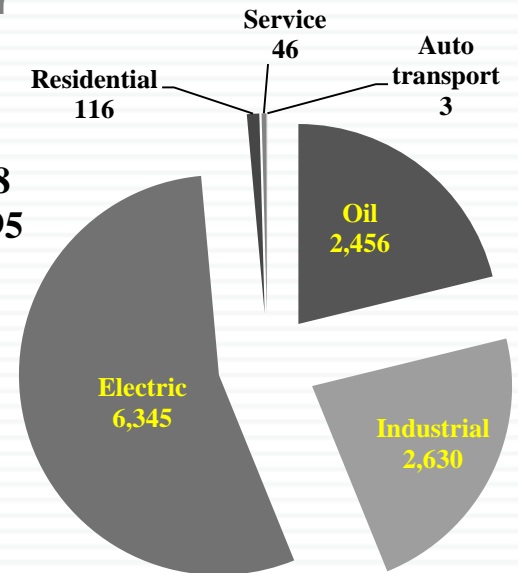


2013
6,952

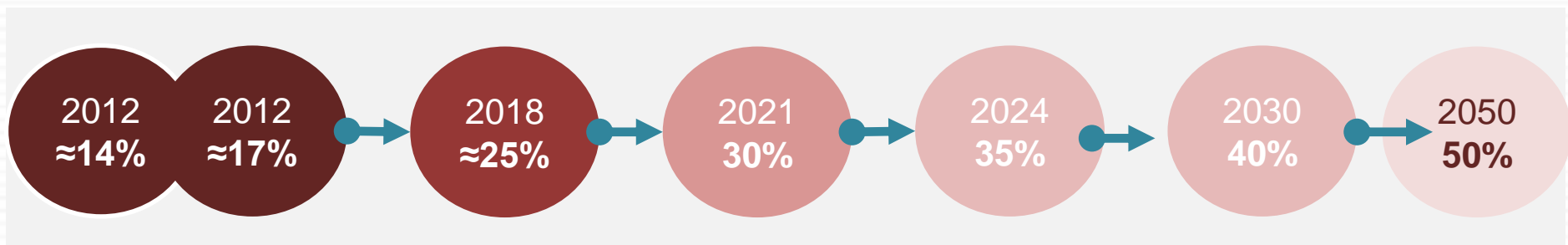


2028
11,595

Natural gas demand in the electricity and industrial sectors will double.



Clean generation percentage in the total generation

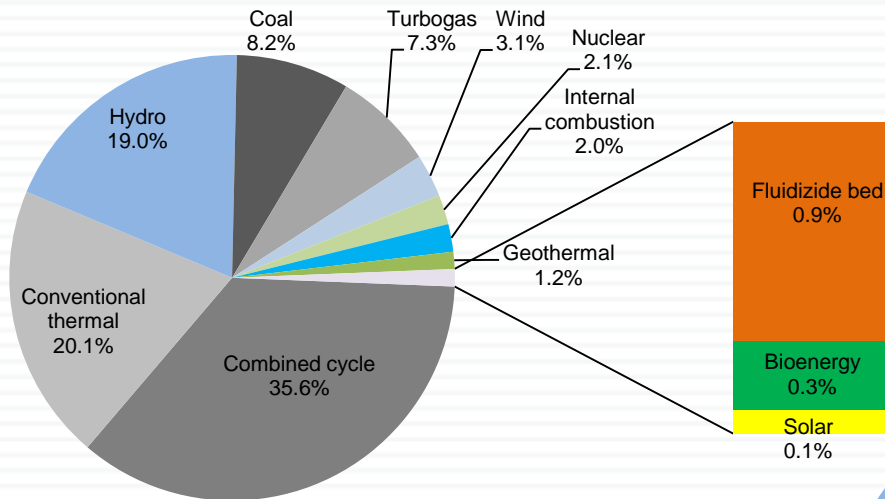


Clean generation includes the following generation technologies:

- Any fossil fuel based plant that has carbon capture and storage technology.
- Hydro.
- Nuclear.
- Any renewable energy source (wind, solar, bioenergy, among others).
- Efficient cogeneration (the term applies to cogeneration plants that comply with the Energy Regulatory Commission definition).

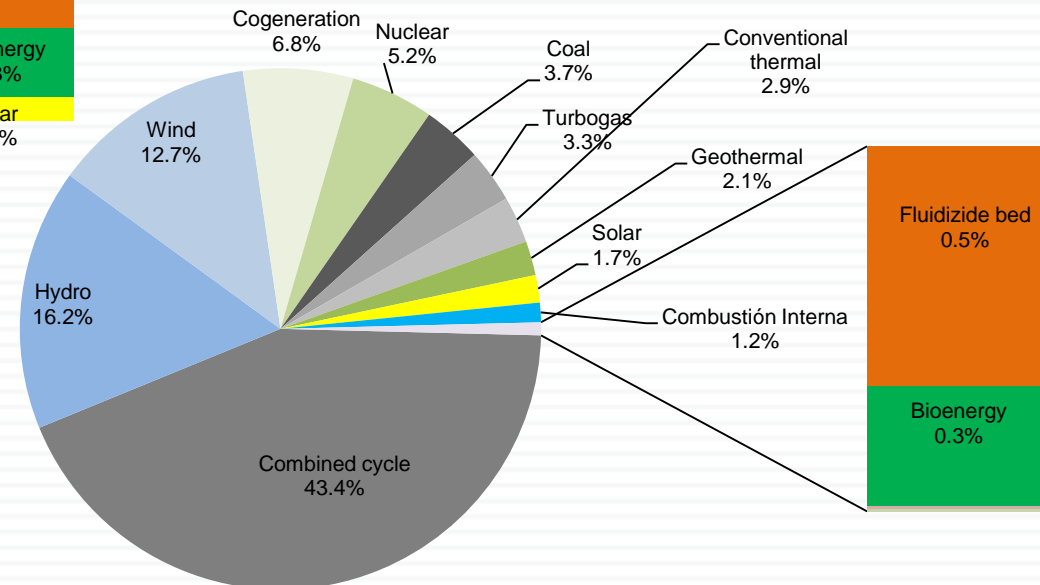
Installed generation capacity

2014
65,451 MW



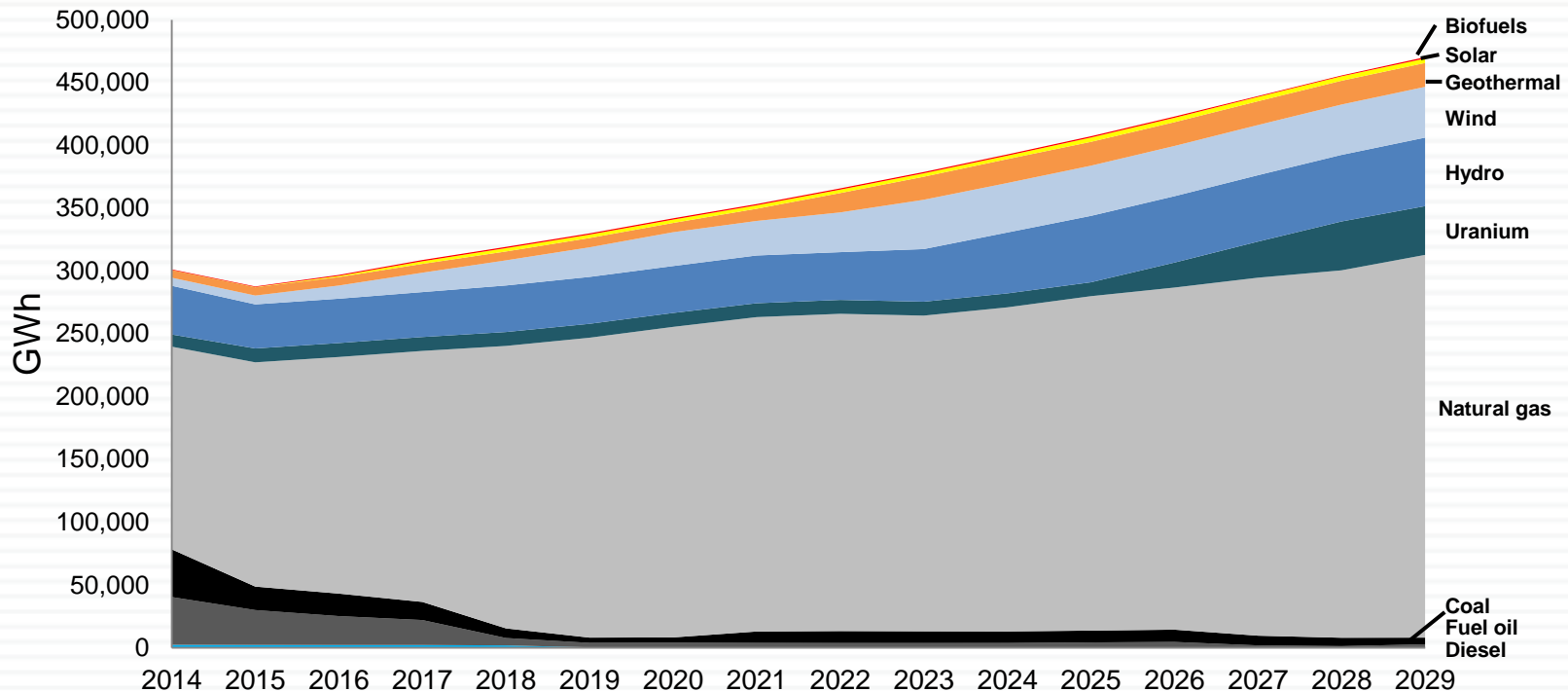
- Clean energy will account for **38%** of the total capacity in **2029**.
- There is a mayor reduction of the conventional thermal capacity (**20% to 3%**).

2029
110,443 MW



- In 2029 natural gas based technologies will account for 47%.

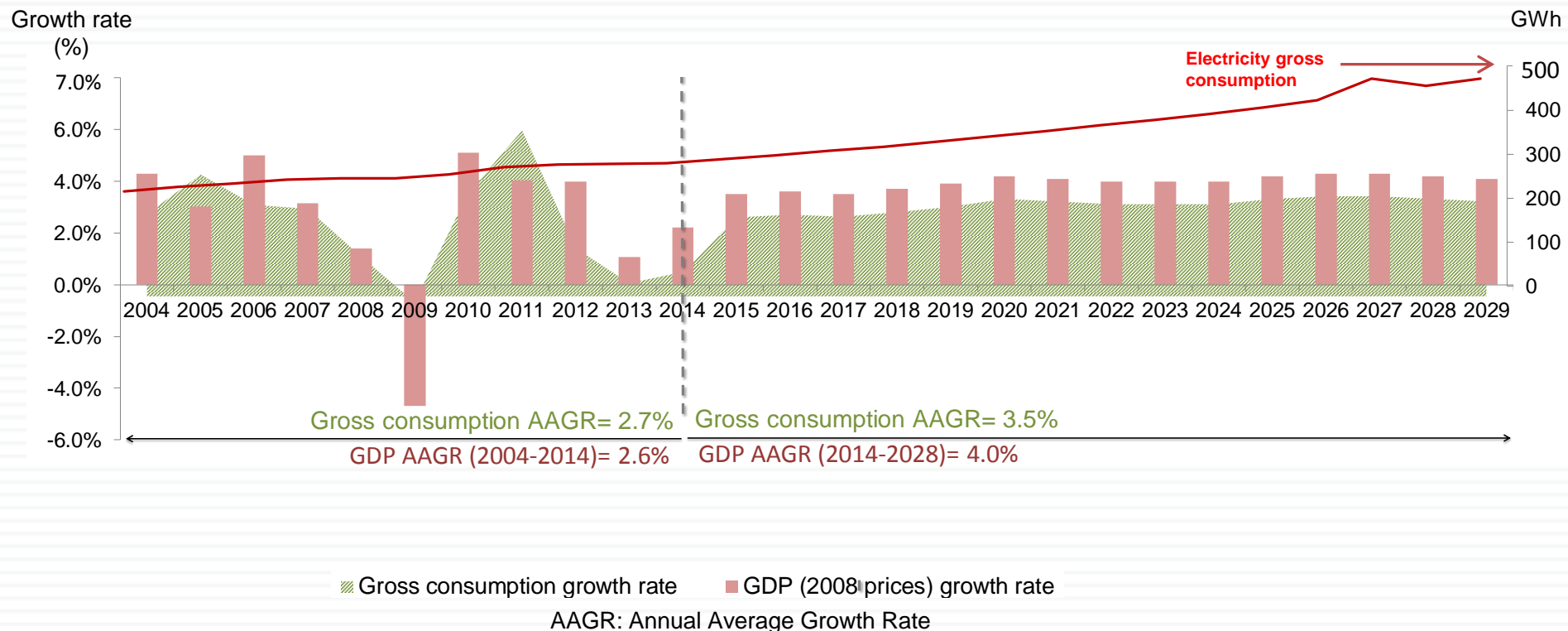
Total generation by source 2014-2029



The key elements in order to achieve the target of greenhouse gases reduction are:

- Phase out of generation plants that use fuel oil, replacing them with natural gas plants.
- A rapid increase in the share of renewables.
- Increase the share of nuclear generation.

Electricity consumption has shown a strong correlation with GDP, this trend is expected to keep on towards the future.



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