

Oferta y demanda de Gas LP en el mundo y el entorno de América Latina

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Lima, Perú

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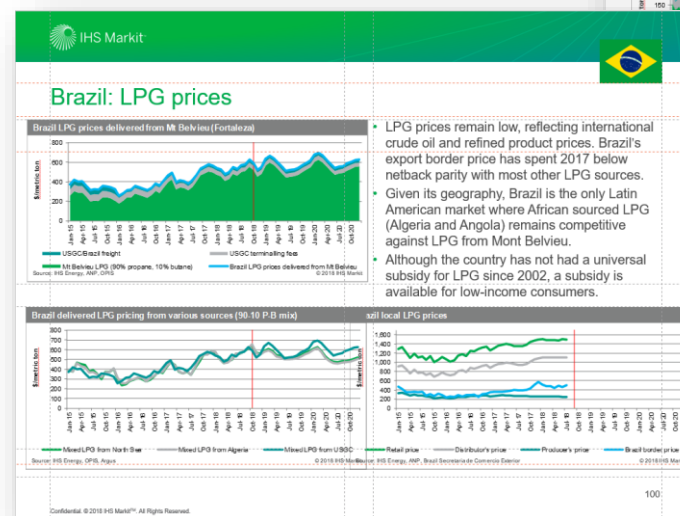
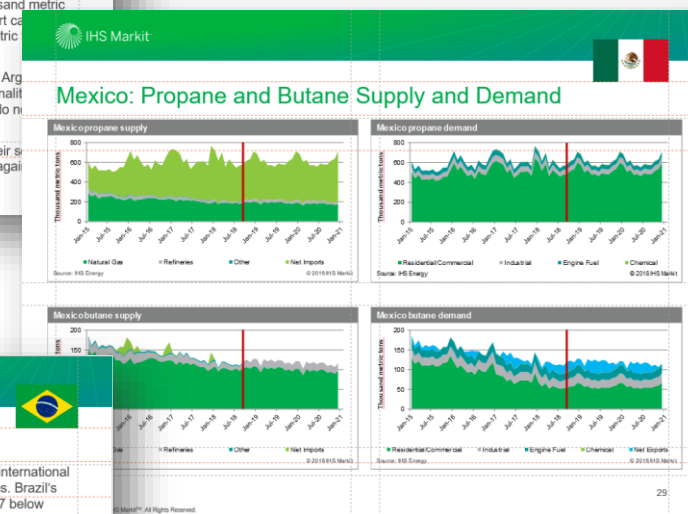
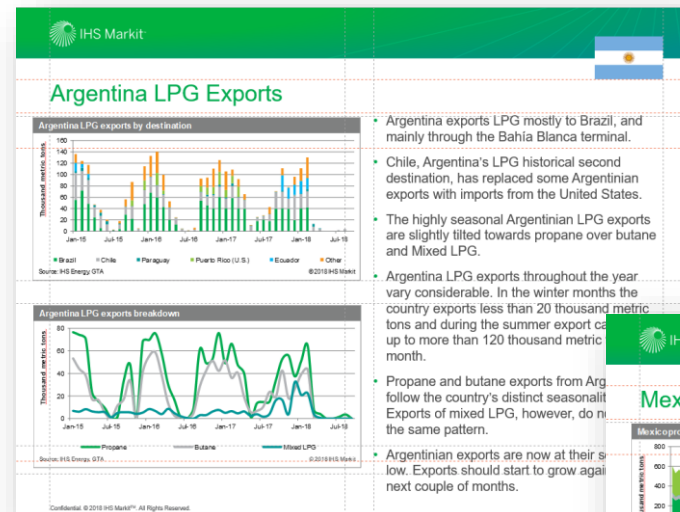
Agenda

- Metodología IHS Markit
- Panorama Global
- Panorama Regional
- Conclusiones
- Retos y oportunidades

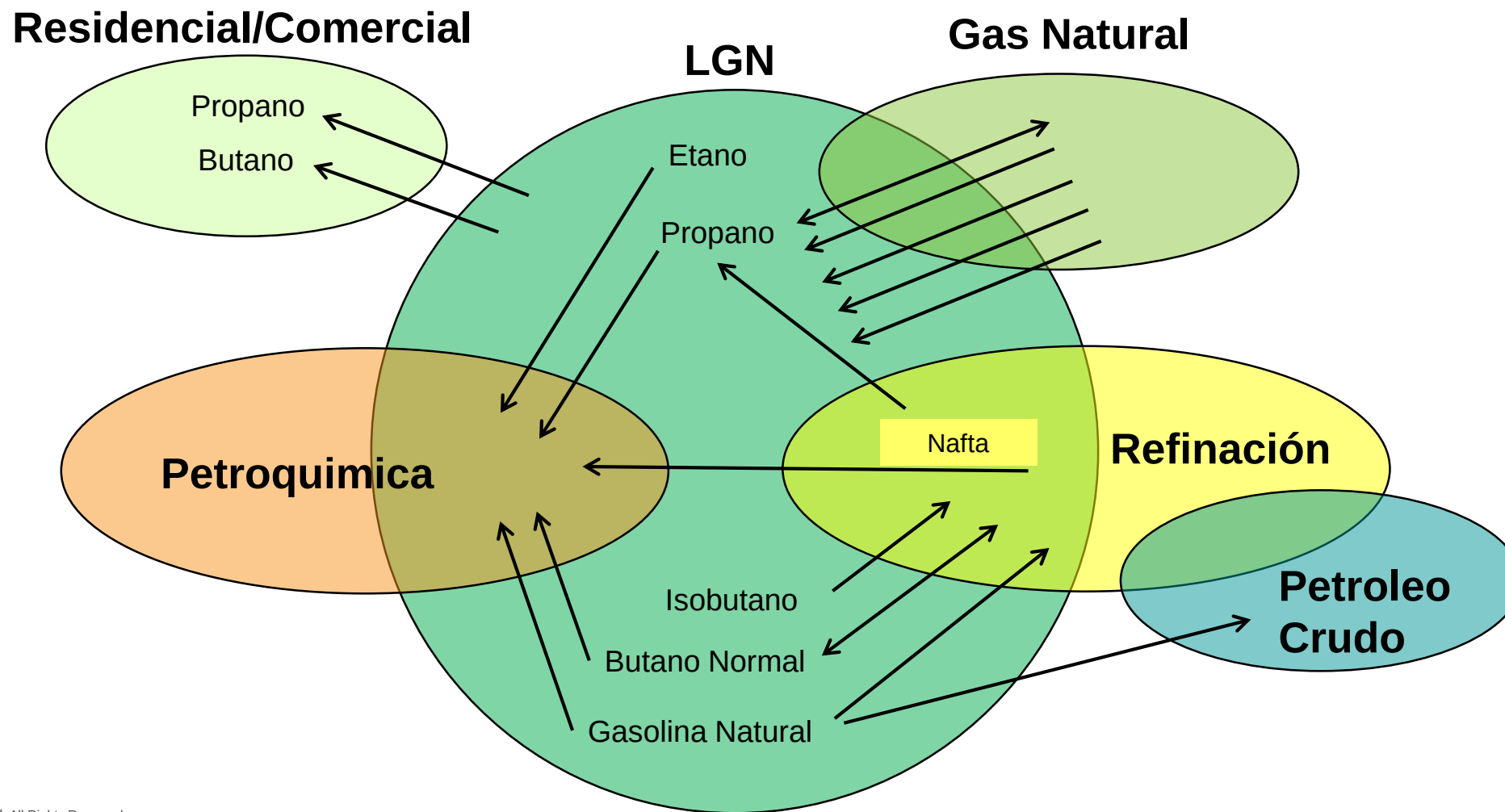
Metodología IHS Markit

Cobertura América Latina

- 29 países en el corto plazo.
 - > Serie mensual (2015-2020)
 - > Análisis de la oferta, demanda, e infraestructura.
 - > Comercio Internacional
 - > Pronostico de precio (molécula, flete, terminal)
- 43 países en el largo plazo
 - > Serie anual (2000-2050)
 - > Análisis de la oferta, demanda, e infraestructura.
 - > Comercio Internacional
 - > Pronostico de precio (molécula, flete, terminal)
- Conferencias, consultoría, y visitas con clientes.

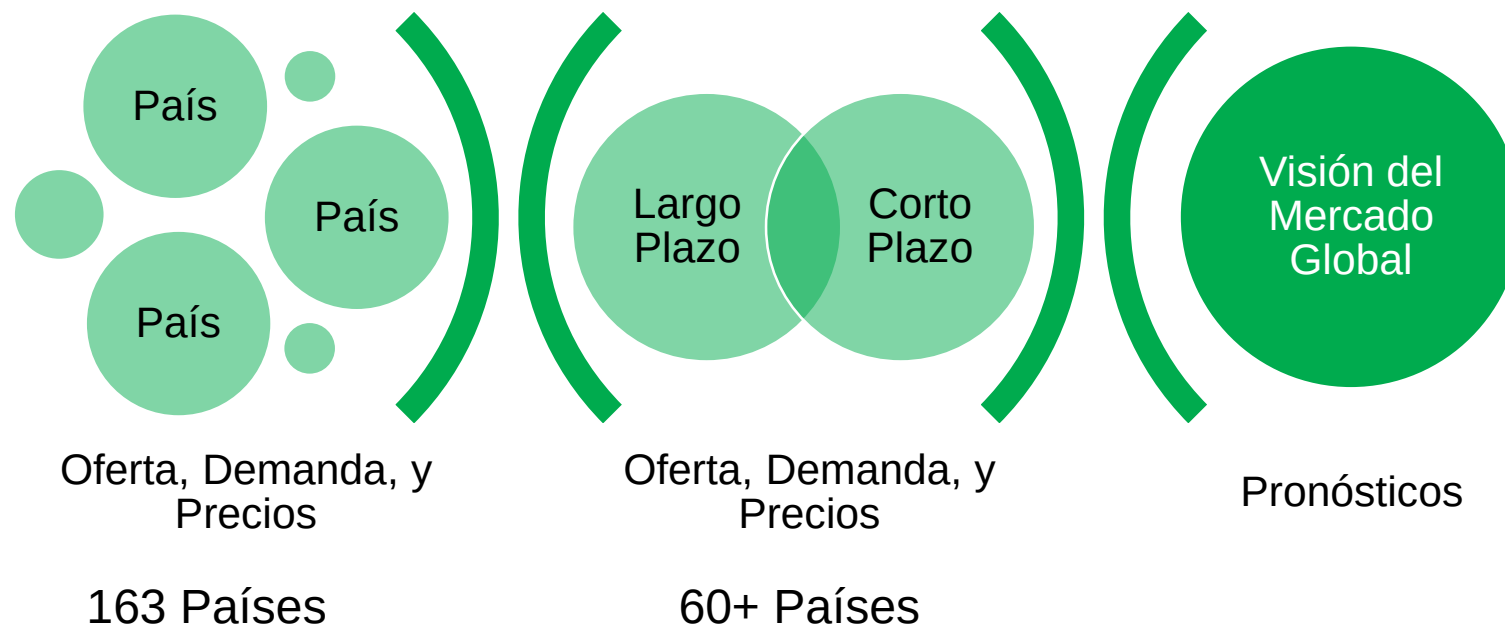


Los Líquidos del Gas Natural (LGN) se ven afectados por varios mercados.



Reporte Anual Servicio de Líquidos de Gas Natural

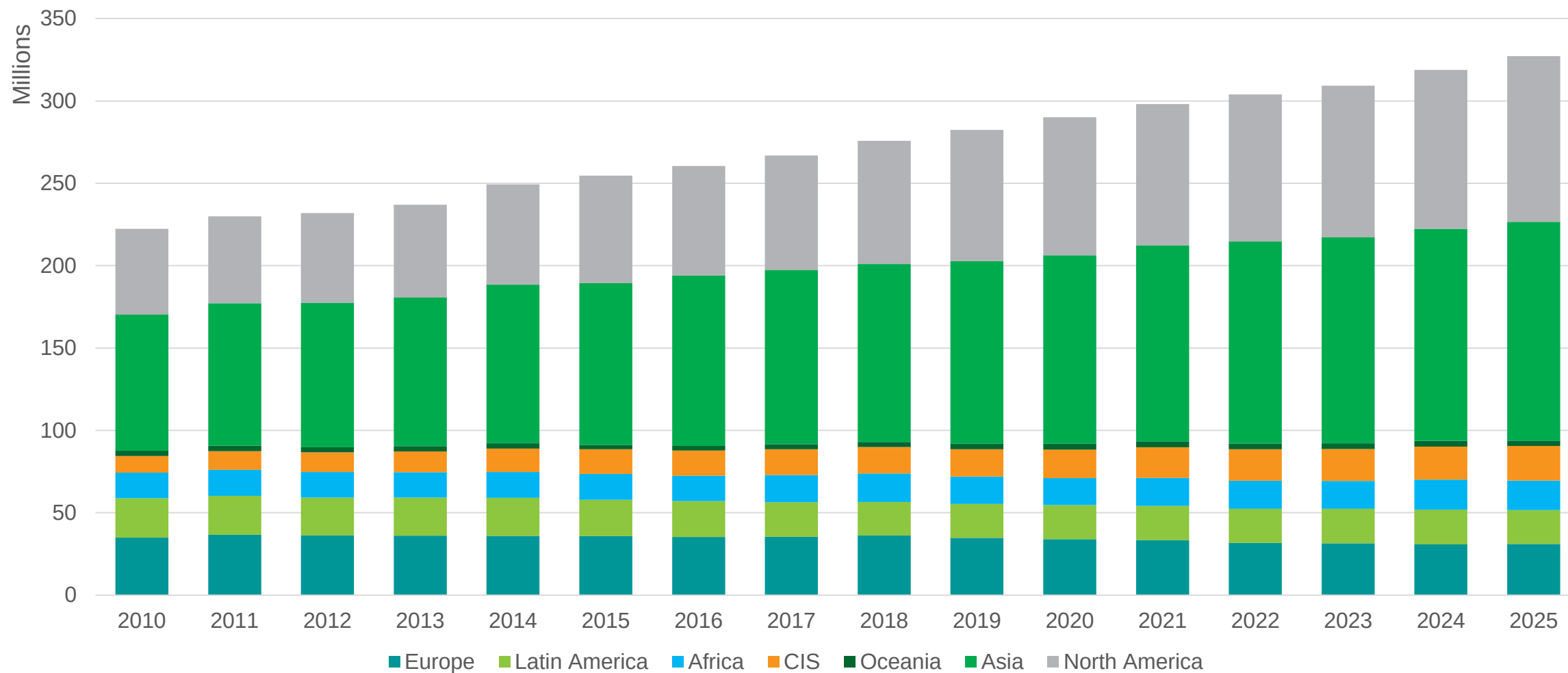
- Análisis independiente del propano y butano.



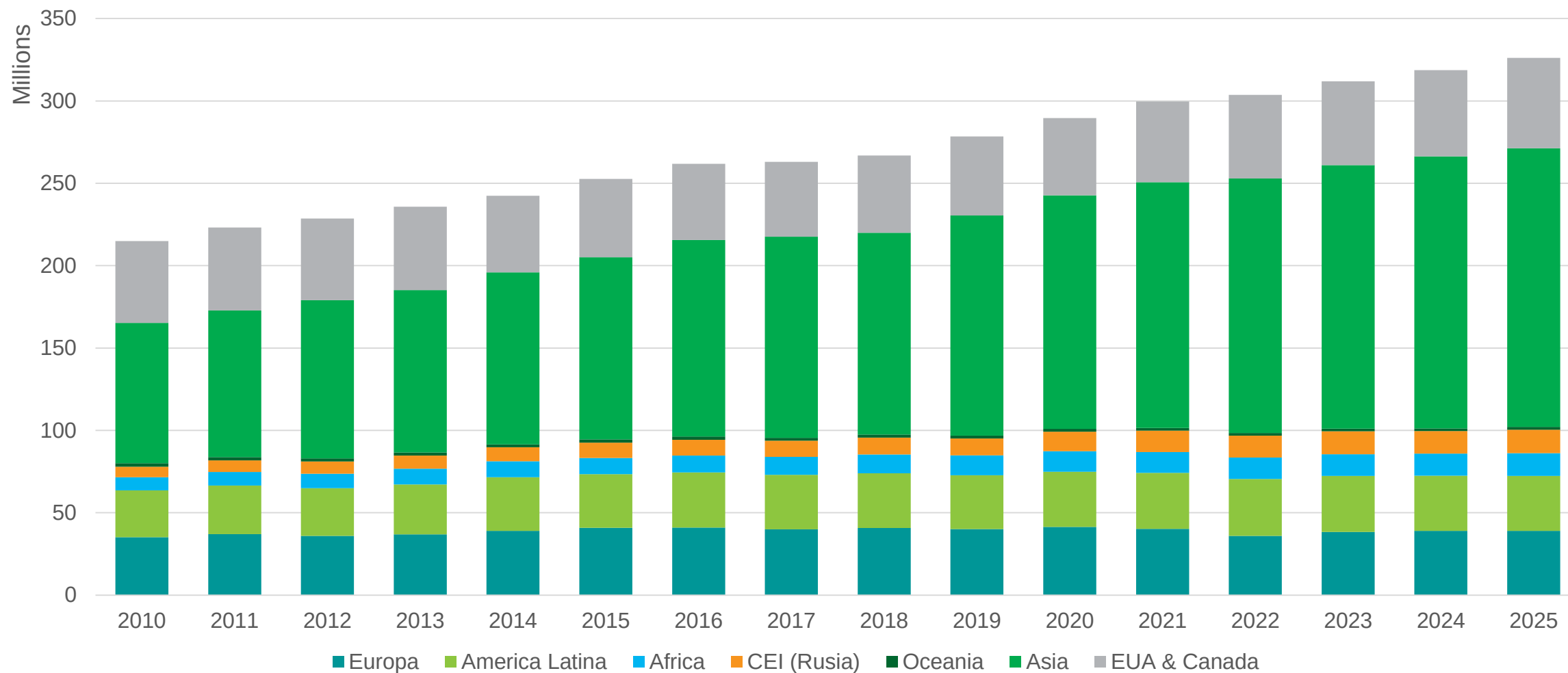
Panorama Global

Gas LP

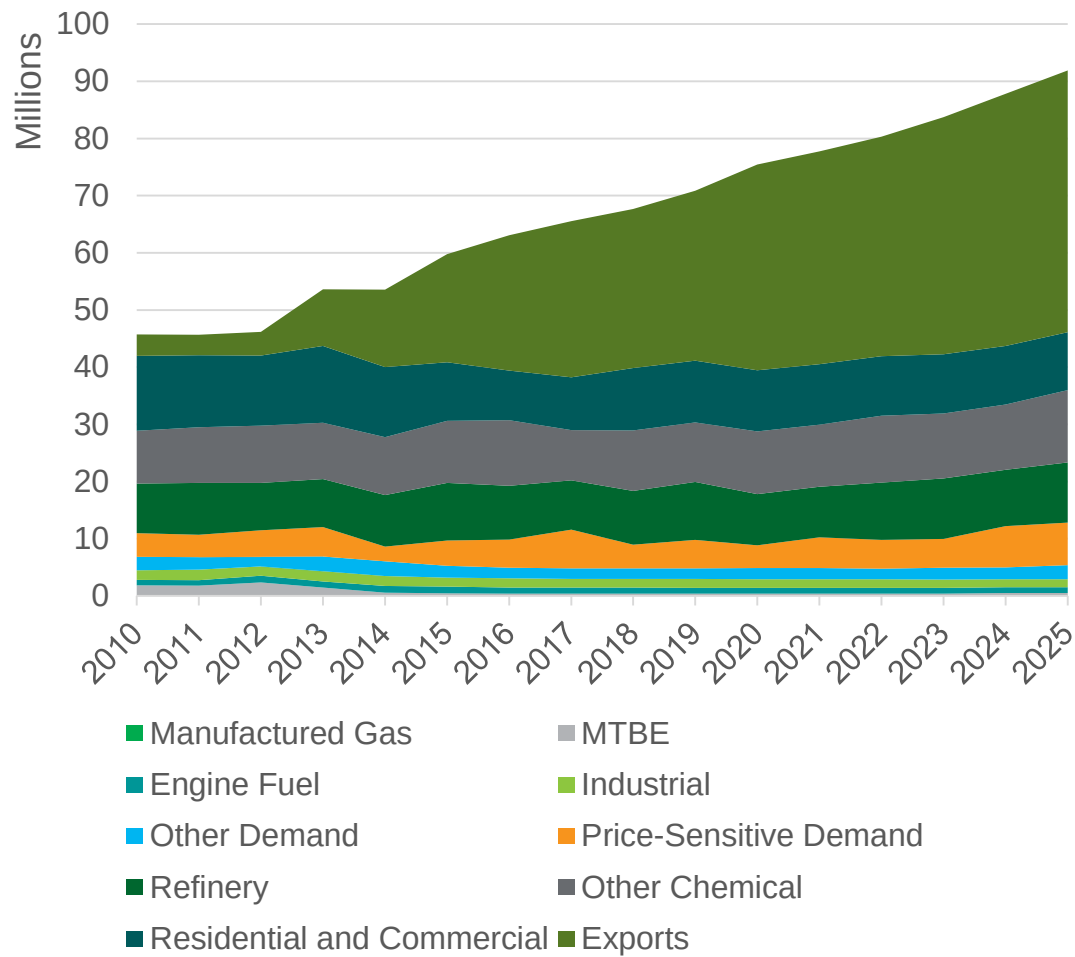
Producción de Gas LP en el mundo.



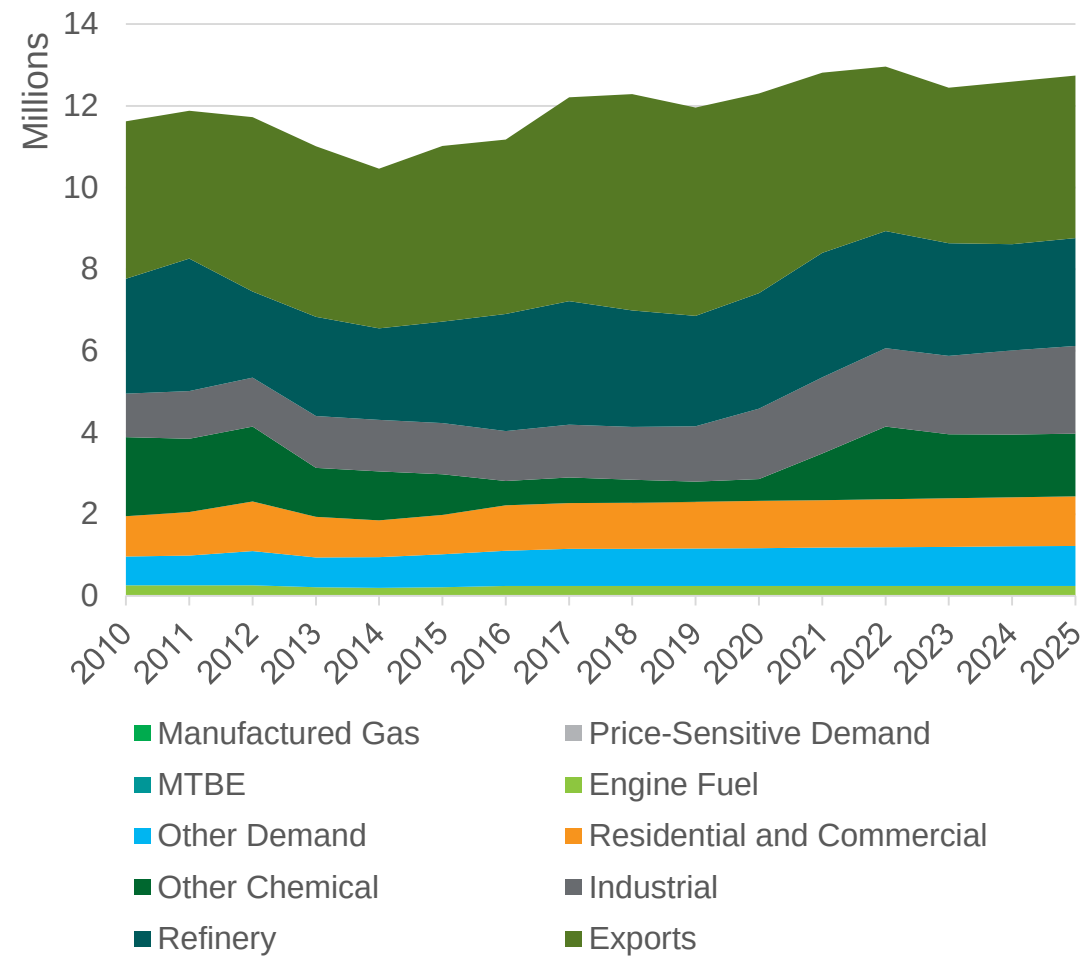
Demanda de Gas LP en el mundo



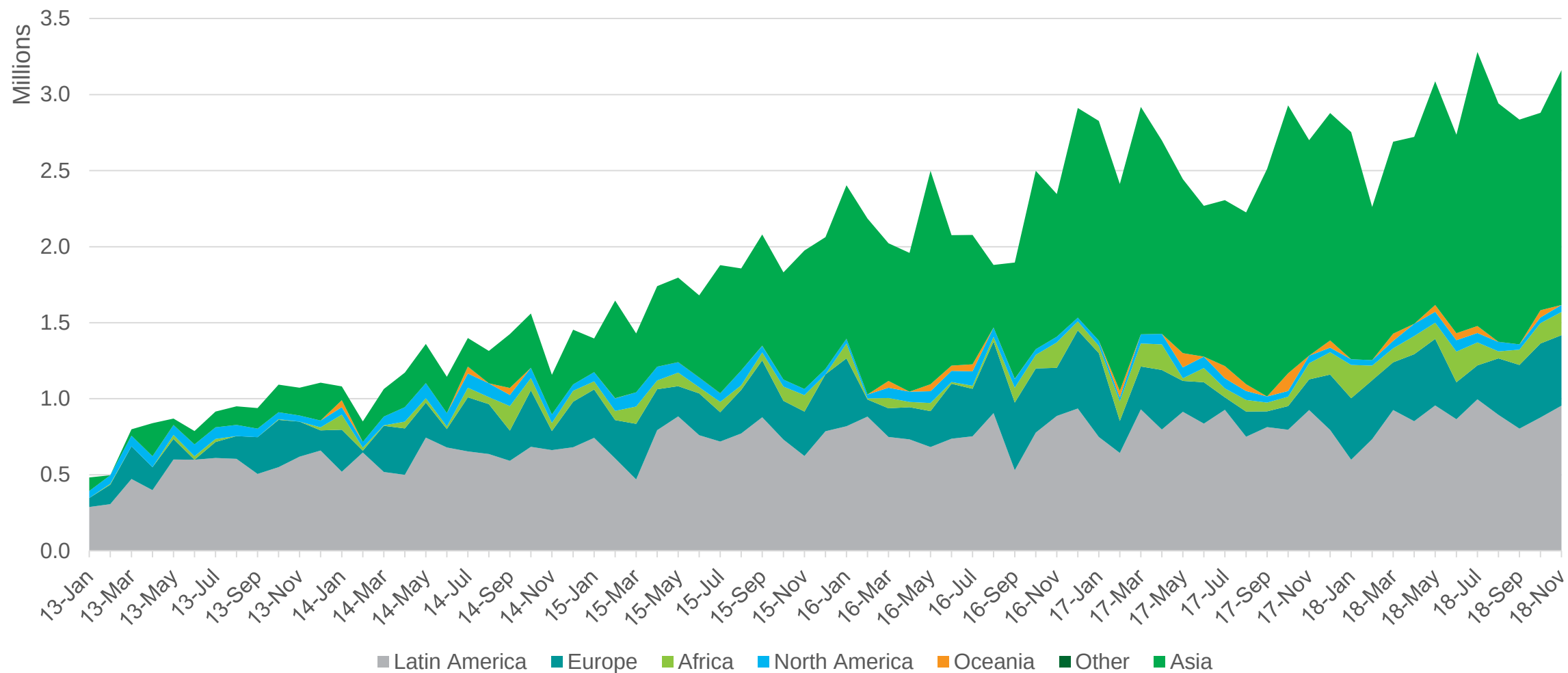
Demanda de Gas LP Estados Unidos



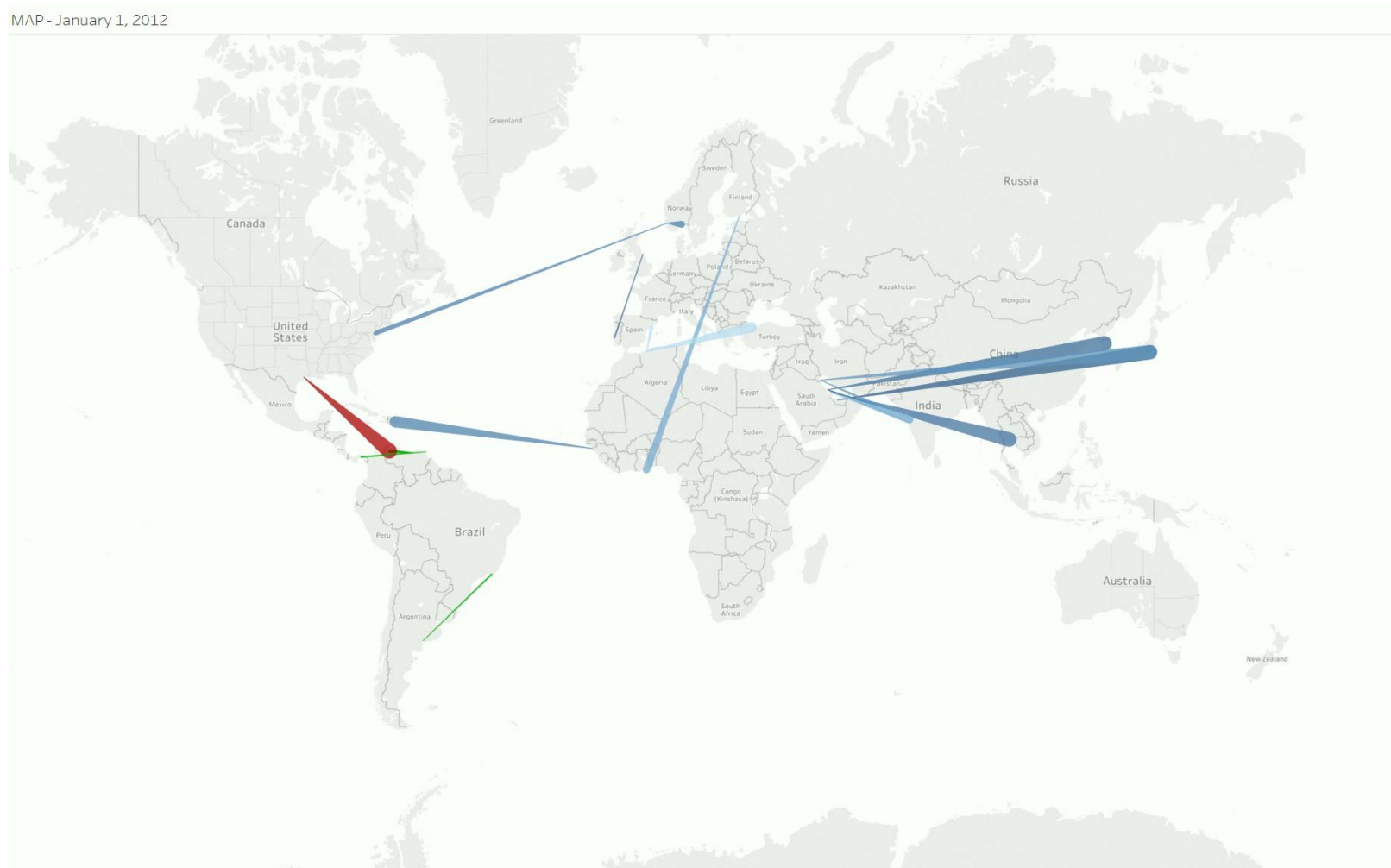
Demanda de Gas LP Canada



Exportaciones de Gas LP de los Estados Unidos por destino



Un mundo cambiante: El flujo del comercio de Gas LP global.



Source: IHS Energy – Waterborne LPG

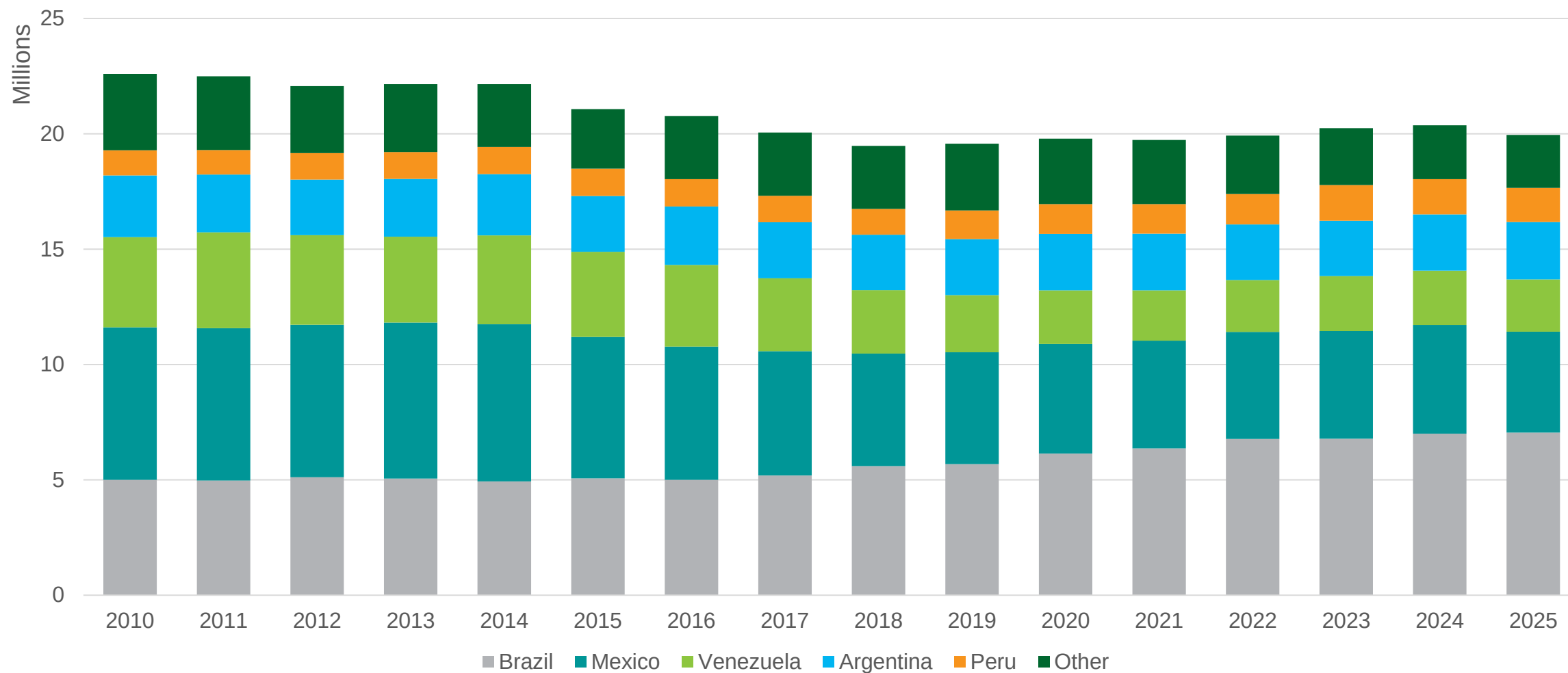
América Latina

Panorama de Gas LP

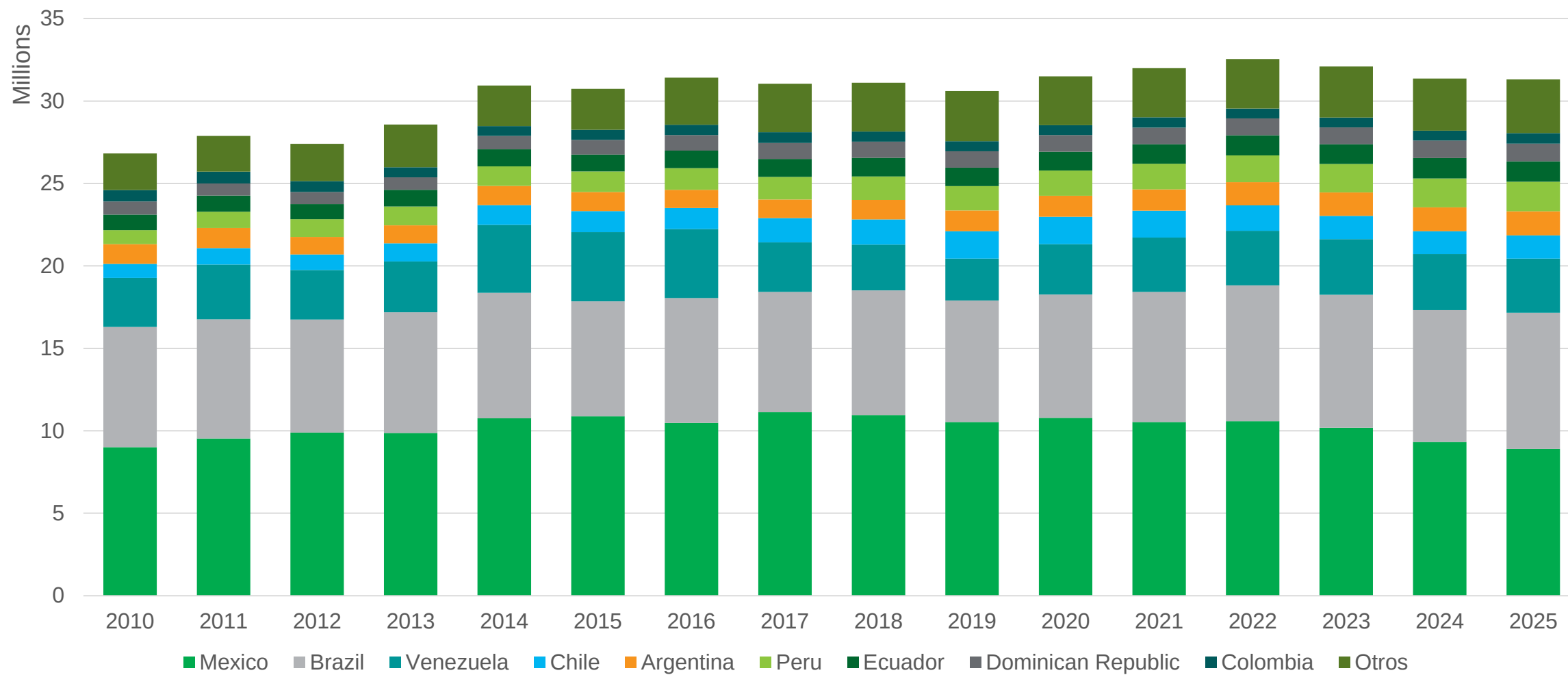
El Mercado de Gas LP en América Latina a grandes rasgos:

- Un mercado en transición.
 - > Creciente influencia del precio de referencia Mont Belvieu.
 - Lo que ocurre fuera de la región cada vez tiene mas importancia en el precio que paga el consumidor final
 - > Incertidumbre debido a las transiciones políticas:
 - Chile
 - Colombia
 - Brasil
 - México
 - Ecuador
 - Inestabilidad política y económica
 - Argentina
 - Venezuela

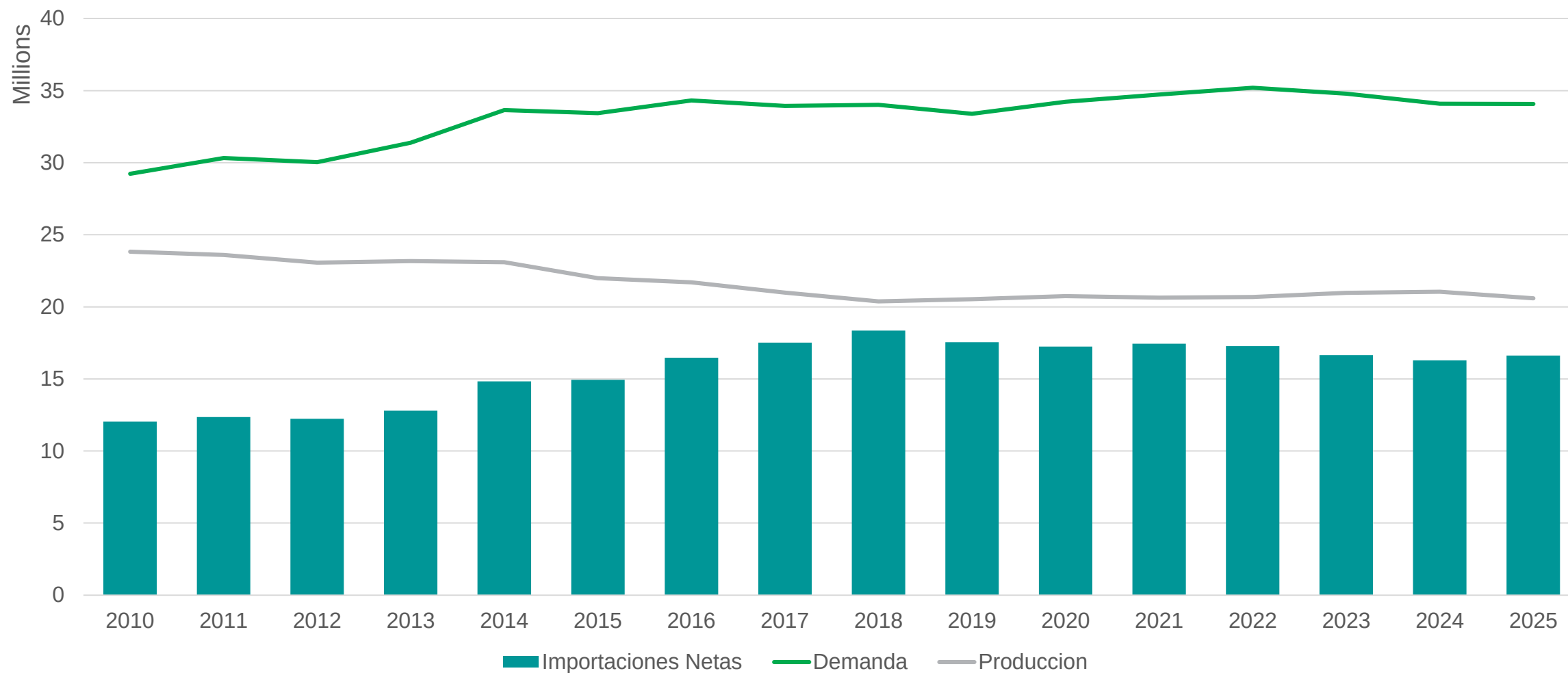
Producción de Gas LP en América Latina



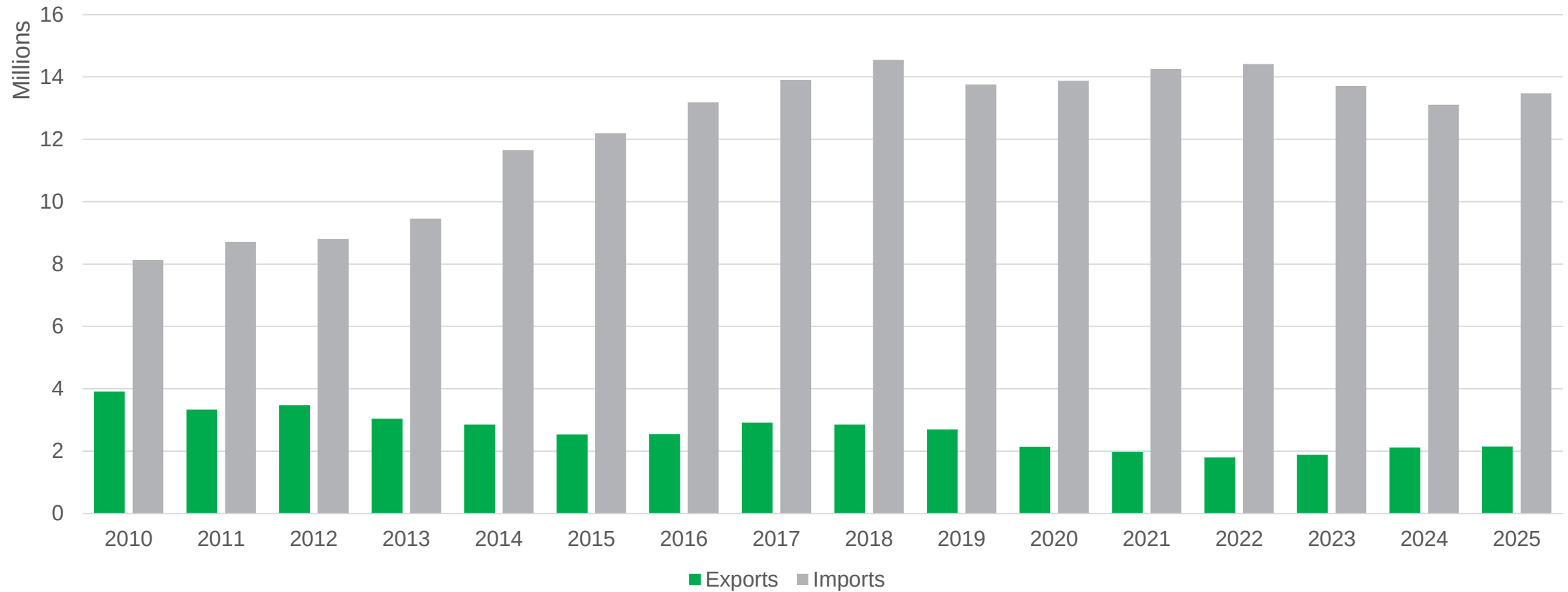
Demanda de Gas LP



Balance de Gas LP regional

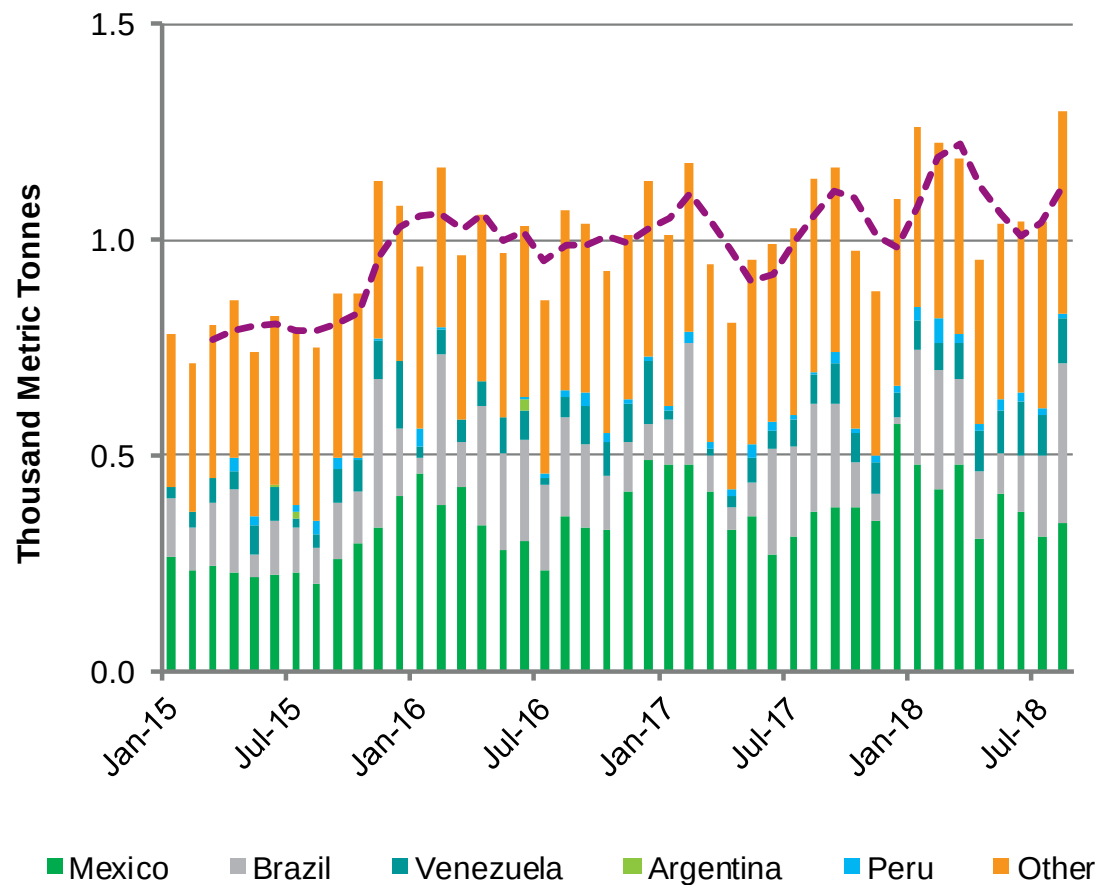


Balance regional: Importaciones vs exportaciones



America Latina: Importaciones vs Exportaciones

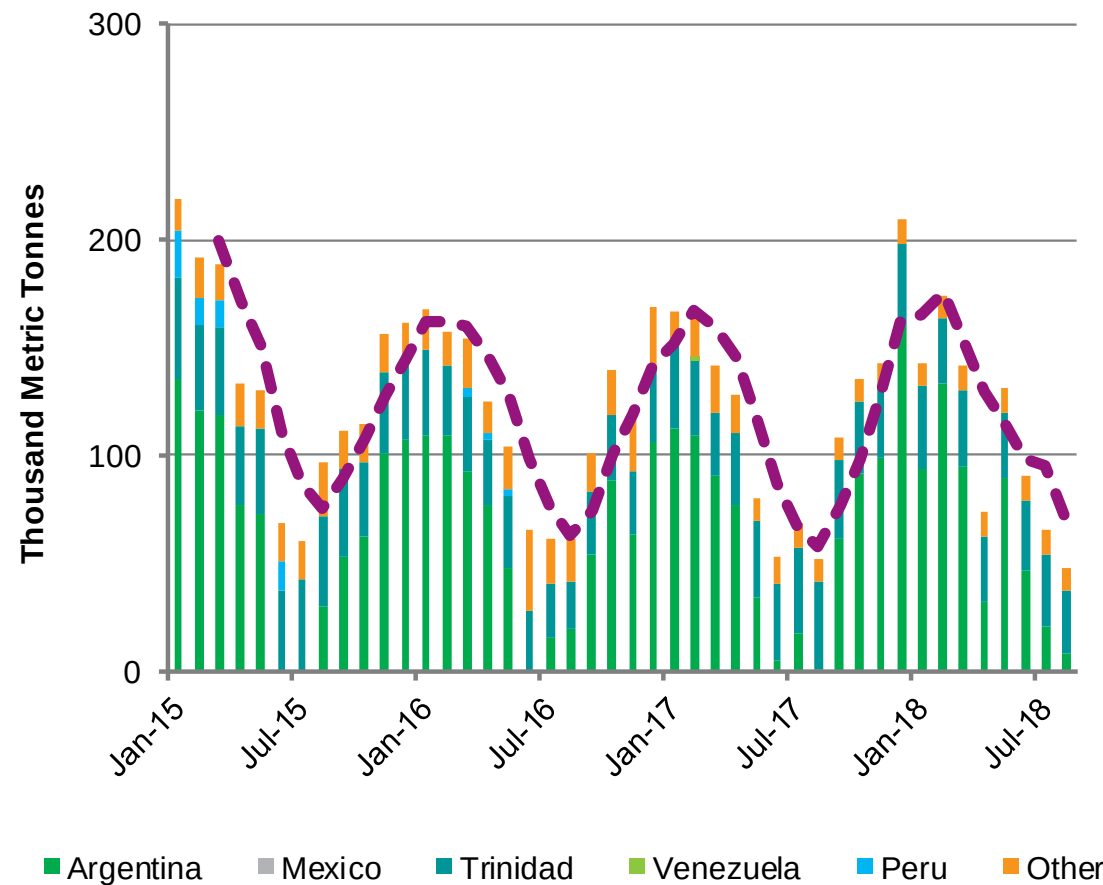
Latin America LPG imports by country



Source: IHS Energy

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Latin America LPG exports by country

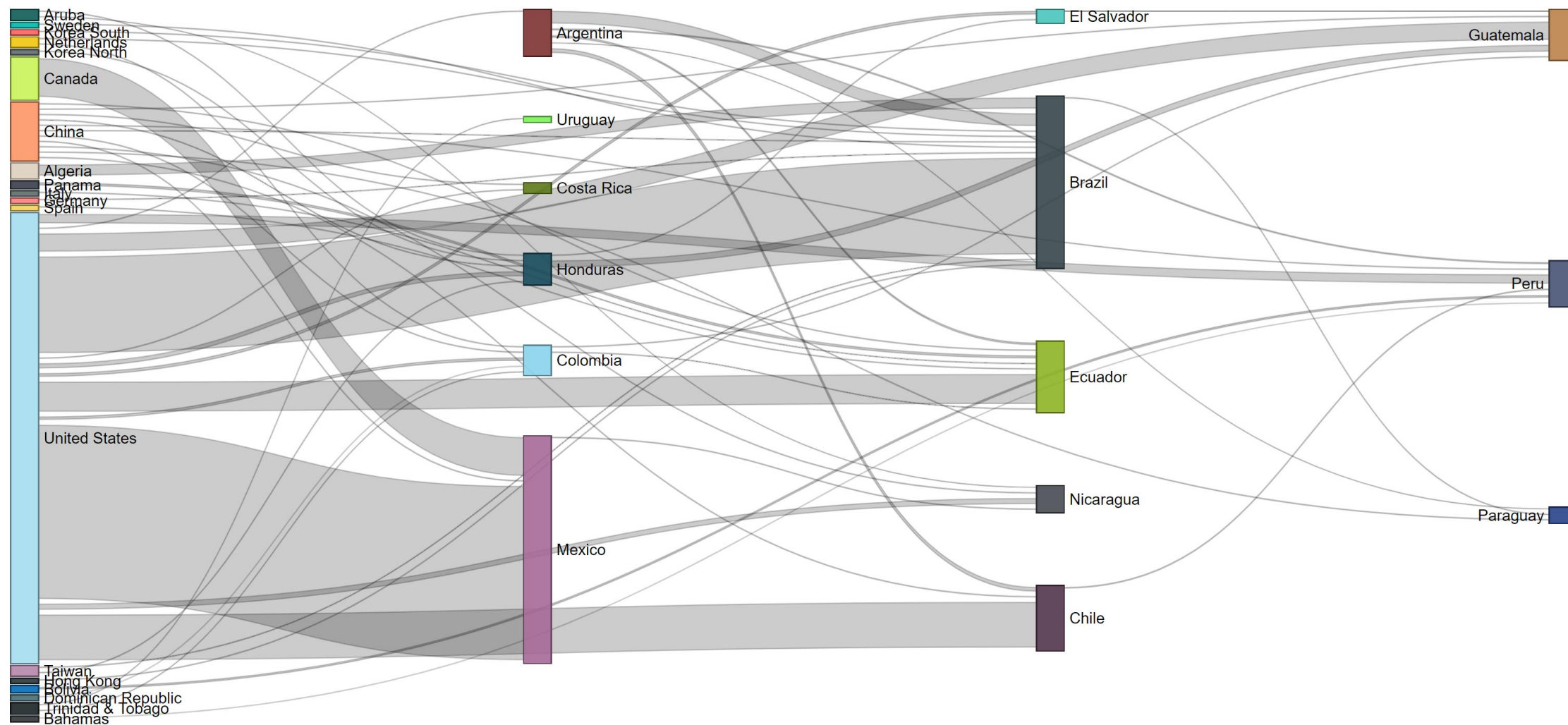


Source: IHS Energy

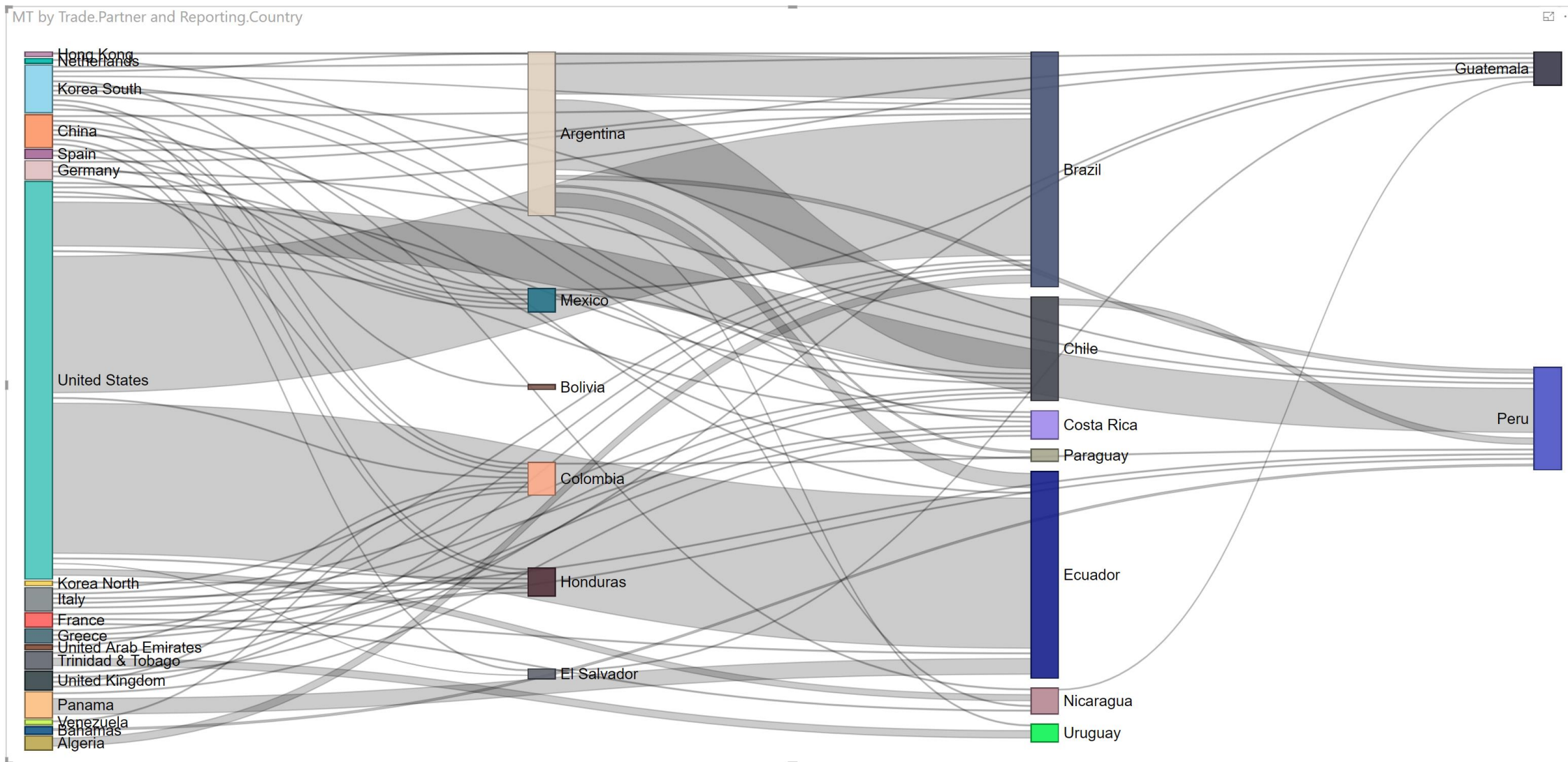
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Importaciones de propano en América Latina (2018)

MT by Trade.Partner and Reporting.Country

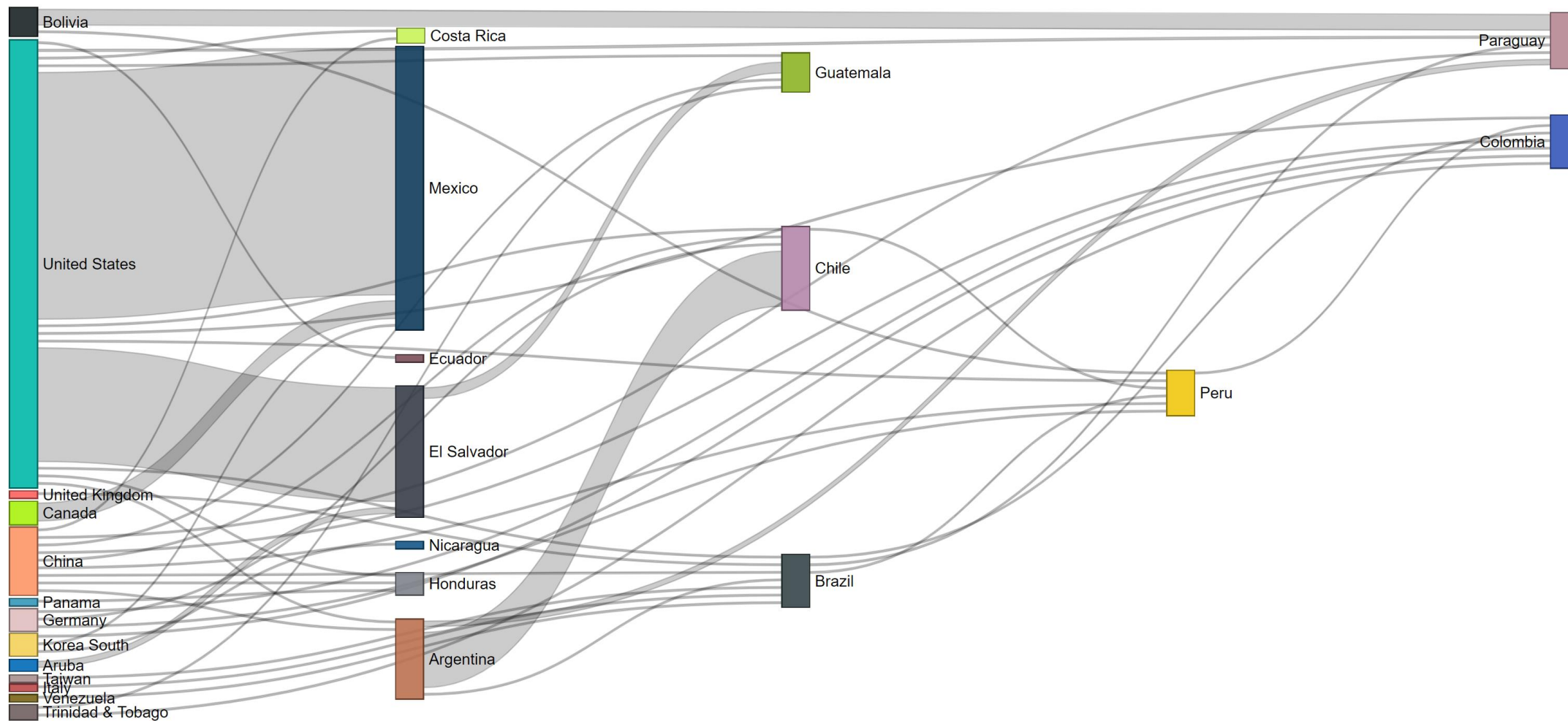


Importaciones de butano en América Latina (2018)

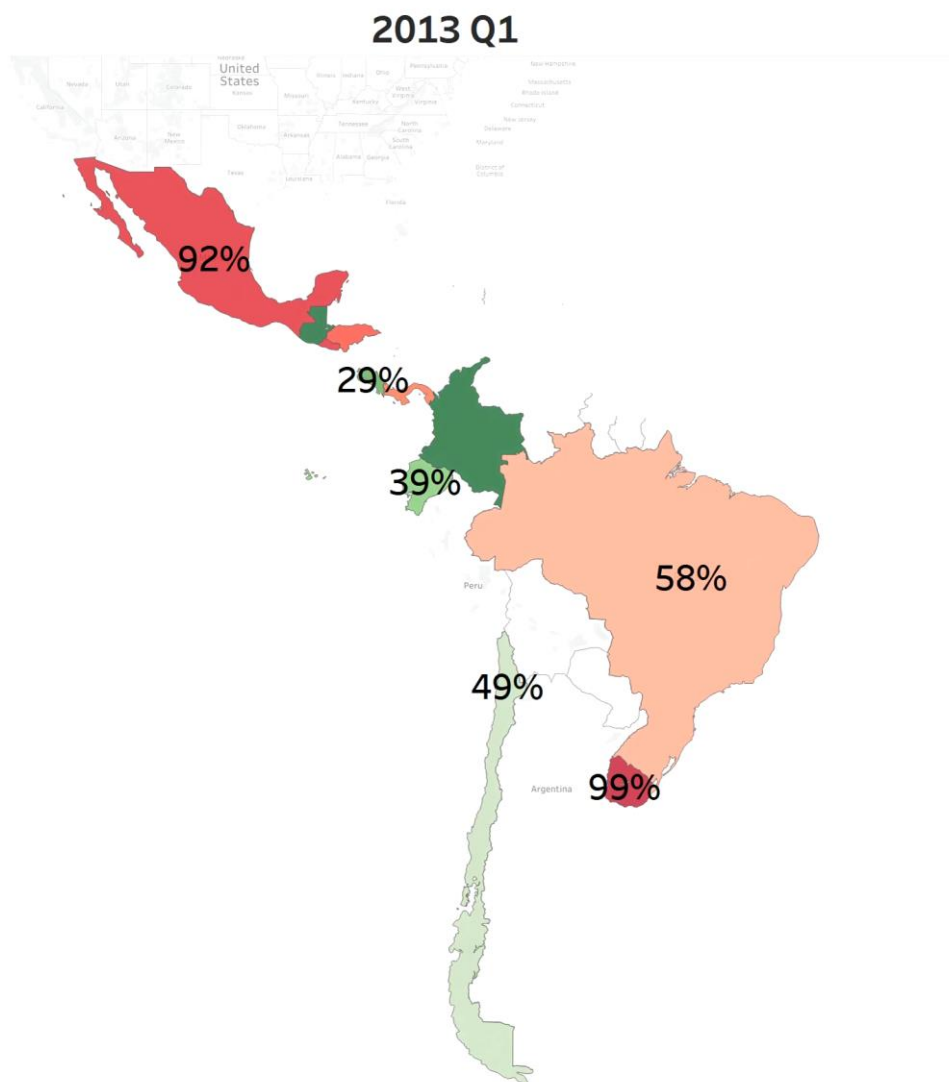


Importaciones de Gas LP mezclado en América Latina (2018)

MT by Trade.Partner and Reporting.Country

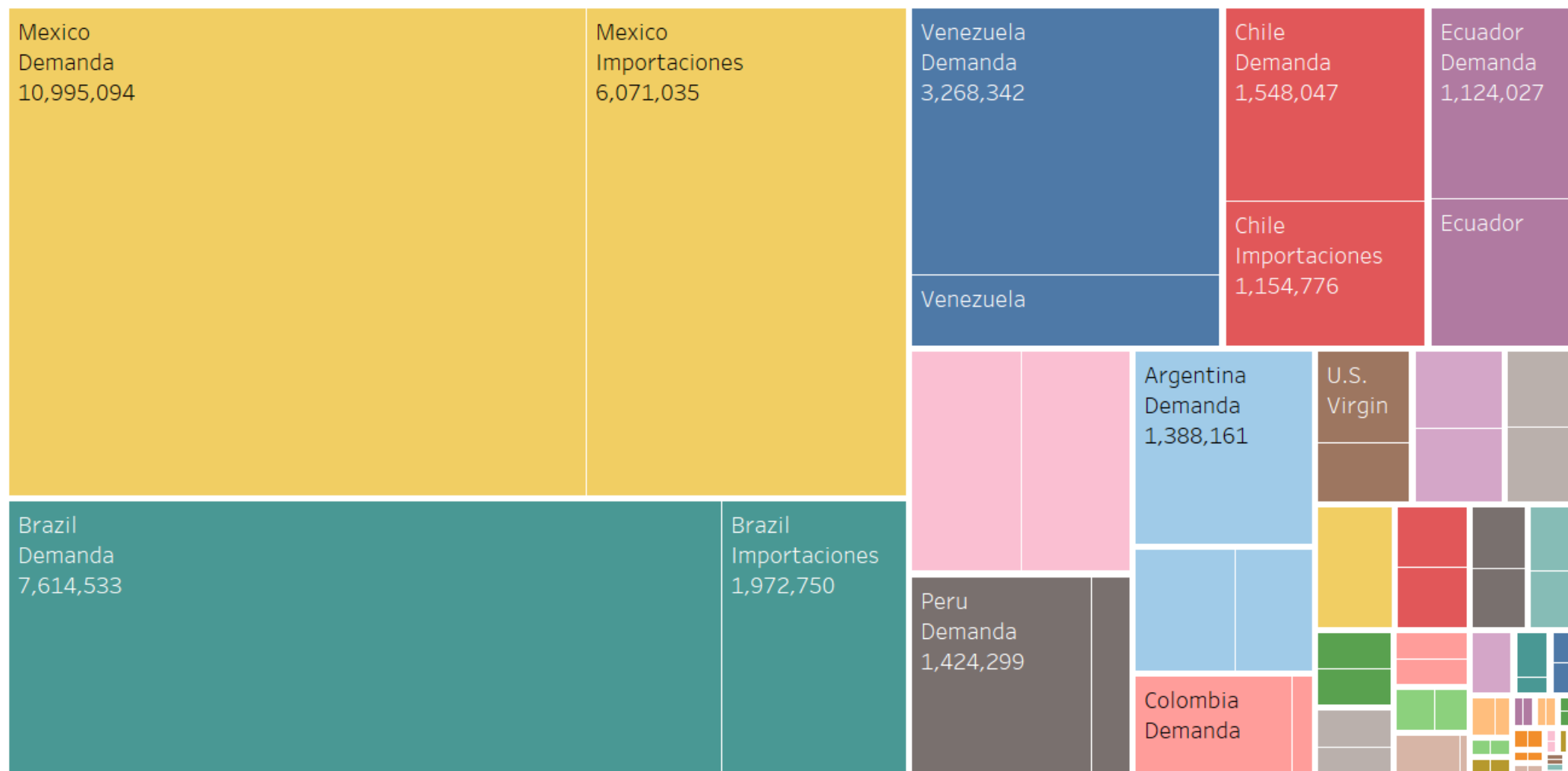


Proporción de Gas LP importado proveniente de los Estados Unidos

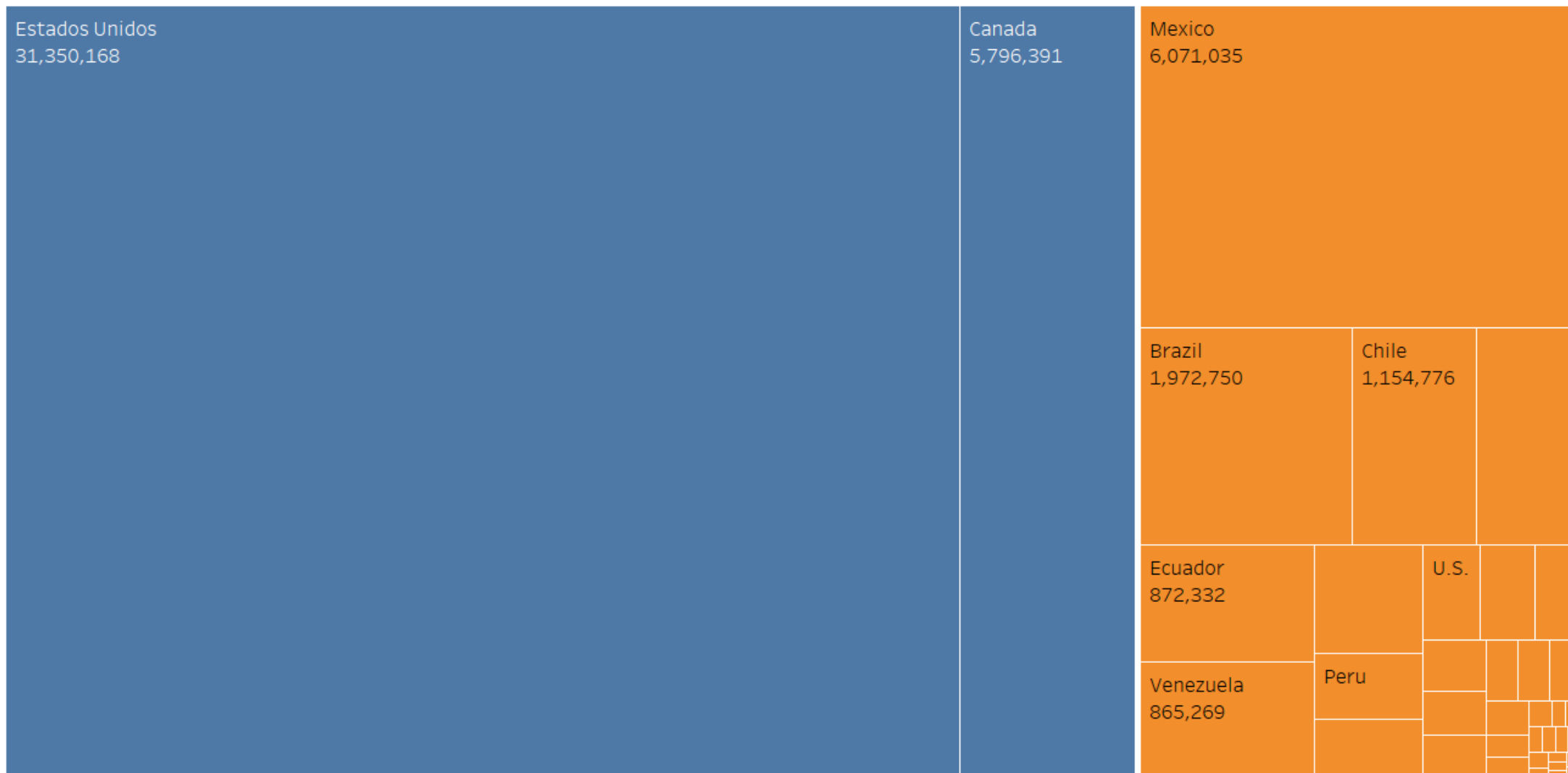


Country	2013	2014	2015	2016	2017
Argentina	0%	9%	1%	13%	3%
Bolivia	0%	0%	0%	0%	0%
Brazil	53%	71%	64%	62%	67%
Chile	68%	68%	62%	76%	76%
Colombia	11%	10%	24%	27%	28%
Mexico	98%	98%	99%	93%	88%
Peru	0%	8%	34%	21%	50%

Demanda de Gas LP en America Latina



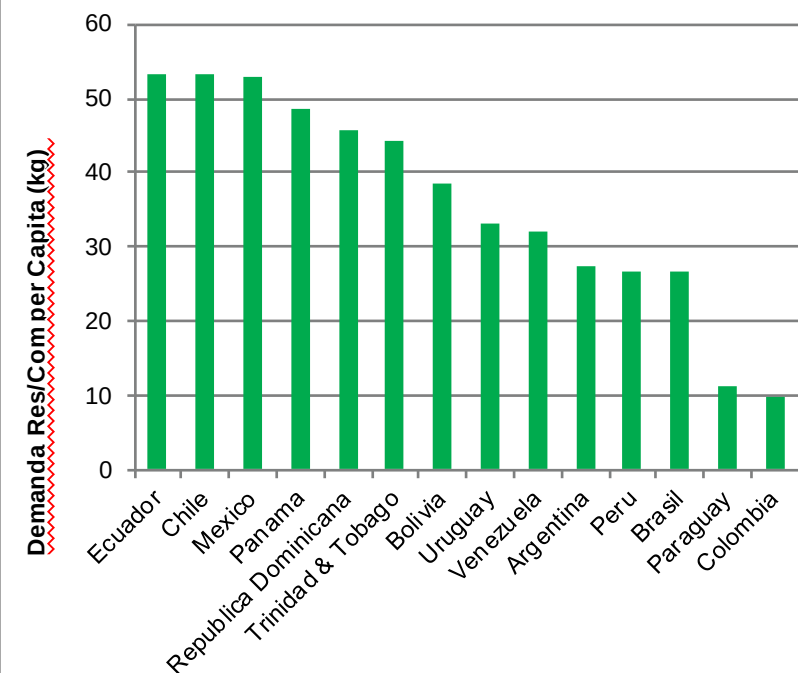
Demanda de Gas LP en America Latina



Consumo residencial y comercial de Gas LP per cápita



Demanda Residencial y Comercial per capita en America Latina

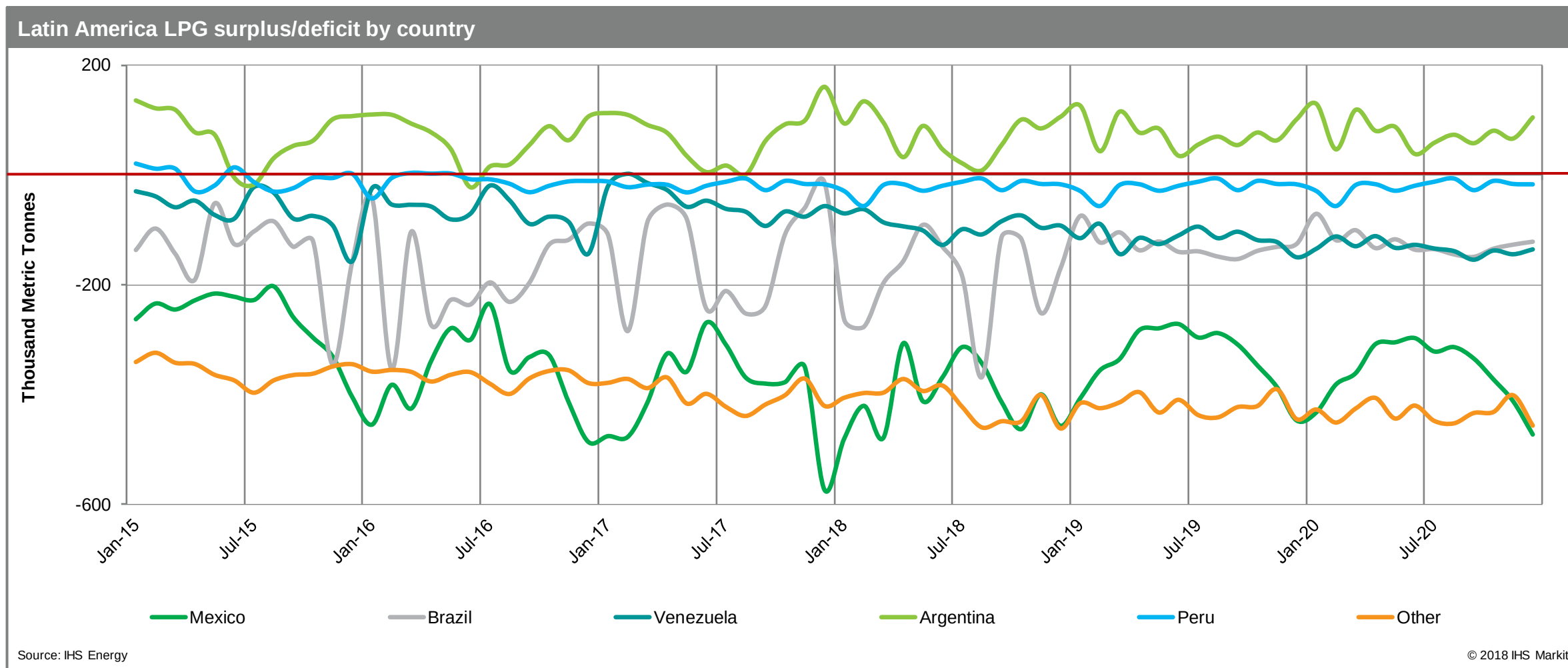


Source: IHS Markit

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La mayoría de los países tiene un déficit en su relación oferta demanda.



Retos y oportunidades.



Conclusiones

- La producción que no se ajusta a la creciente demanda da como resultado una mayor dependencia de las importaciones.
- América Latina ahora participa en un mercado mundial. La comprensión local de los impulsores de precios globales es una necesidad.
- A pesar de sus similitudes, no todos los países en la región están en la misma situación.. Existen varias oportunidades en América Latina y hay espacio para el crecimiento comercial residencial en el uso del Gas LP.



¡Aparten la fecha!

Seminario de Gas LP en America Latina 2019

12 al 14 de noviembre del 2019

Quito, Ecuador



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