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Unlocking Latin America's Next Growth Wave

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THE OPPORTUNITY IN NUMBERS



Latin America infrastructure financing need: **USD 2,220,736 million by 2030**

Table ES.3. "By 2030" LAC investment across SDG infrastructural components, by subsector (USD billions)

TYPE OF INVESTMENT		New investment	Maintenance and asset replacement	Total gap	Annual investment needed to close gap (% of GDP)
WATER AND SANITATION	SAFE ACCESS TO WATER (HIGH)	90.6	52.0	142.6	0.20%
	SAFE ACCESS TO SANITATION (HIGH)	148.5	65.9	214.4	0.30%
	WASTEWATER TREATMENT	16.8	0	16.8	0.02%
ELECTRICITY	ACCESS TO ELECTRICITY	25.4	64.1	89.5	0.13%
	GENERATION AND TRANSMISSION (BASE SCENARIO)	371.5	116.1	487.5	0.69%
TELECOMMUNICATIONS	FIXED BROADBAND	44.1	38.2	82.3	0.11%
	4G	65.3	146.1	211.4	0.30%
TRANSPORTATION	ROADS	310.7	427.8	738.5	1.04%
	AIRPORTS	15.2	0	15.2	0.02%
	URBAN MASS TRANSIT (BRT SCENARIO)	222.4	0	222.4	0.31%
TOTAL		1,310.5	910.2	2,220.7	3.12%

- 2.5% average GDP growth potential lost due to infrastructure deficits.
- Latin America and the Caribbean will need to invest at least 3.12% of its GDP in infrastructure each year until 2030.
- *59% should be allocated to investments in new infrastructure and 41% to investments in maintenance and replacement of assets.*
- Demand rising in energy, transport, water, and digital connectivity.
- High impact, high demand, long-term resilience.

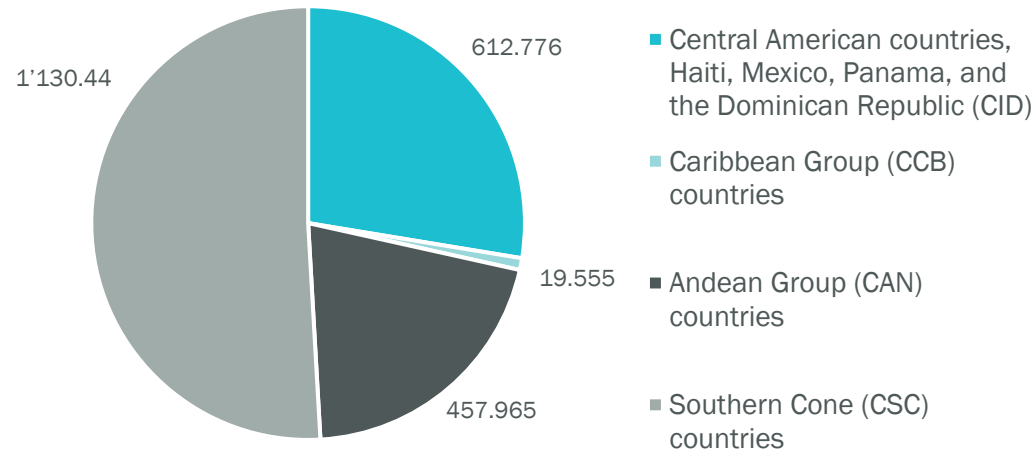
Source: [The Infrastructure Gap in Latin America and the Caribbean: Investment Needed Through 2030 to Meet the Sustainable Development Goals](#) | Publicaciones

THE FINANCING GAP



The region will need to boost investment by more than 70 percent, from 1.8% to 3.12% of its GDP.

Investment Needs by 2030 (USD Billion)



Source: Own elaboration with data from [The Infrastructure Gap in Latin America and the Caribbean: Investment Needed Through 2030 to Meet the Sustainable Development Goals](#) | Publicaciones

Legacy Dynamics - Investment Considerations

- Historical Investment Deficit.
- Shortage of liquid and long-term capital markets.
- Political instability and regulatory changes affect infrastructure projects, increasing investors' perceived risk.
- Projects lack technical, financial, and legal studies to be bankable.
- Limited innovative financing mechanisms with instruments such as green bonds or specialized funds
- State budgetary constraints limit financing capacity.

➡ Blended finance and private capital essential

➡ Major funding gap = investment opportunity

WHY NOW? MARKET TIMING

LAC is becoming a strategic alternative to other Emerging Markets

- **Economic recovery:** Stabilizing macro trends + strong FDI flows = lower risk premiums, more capital availability, and smoother exit options.
- **Nearshoring boom:** supply chains shifting closer to the U.S. market.
- **Energy transition accelerating** across the region
- **Geopolitical realignment** – Shift from China centric supply chains, strategic minerals, global food security.
- **Infrastructure modernization** driving competitiveness.
- **Demographic advantage:** young, growing workforce, ~332 million (CEPAL).



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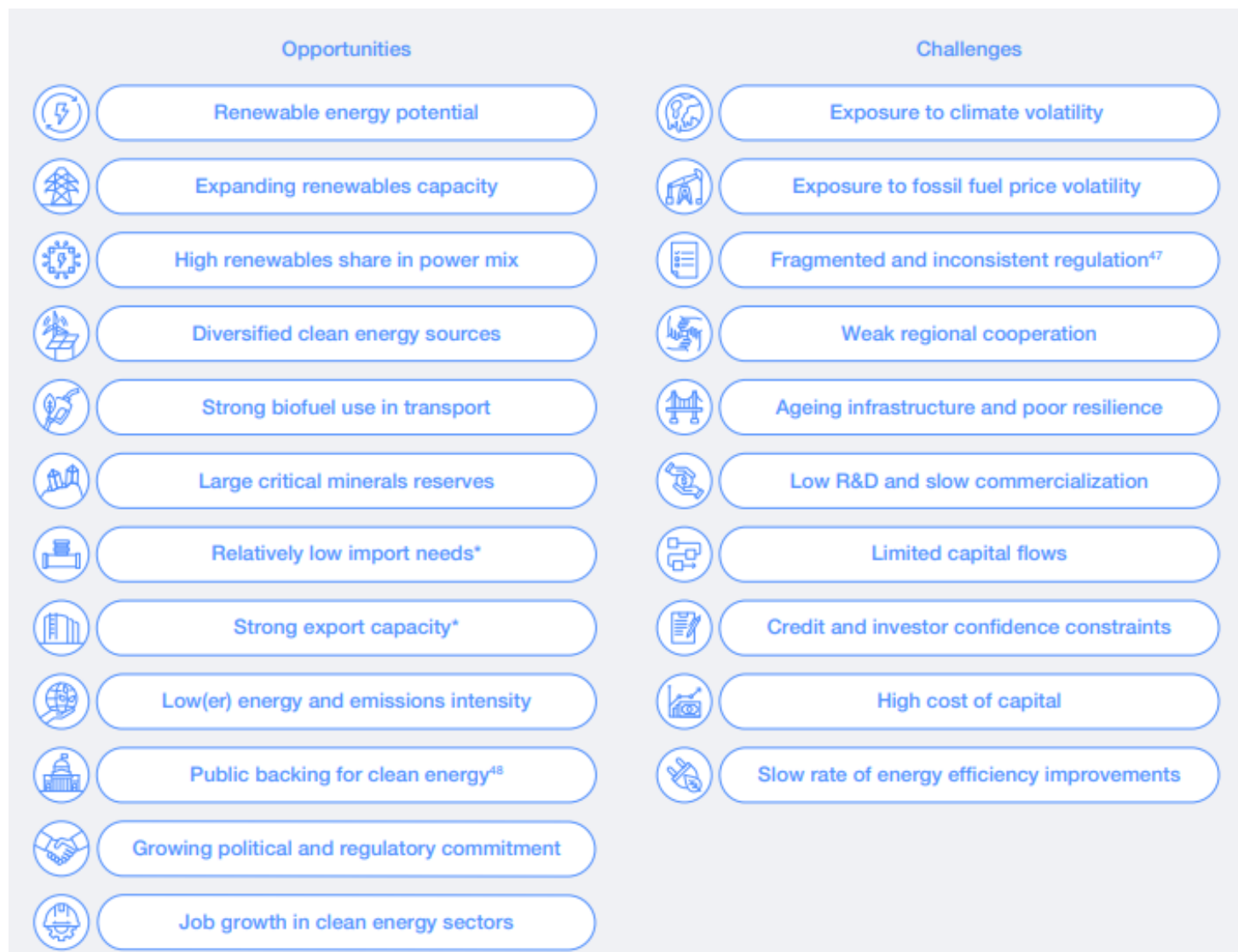
SUSTAINABILITY AS A GROWTH DRIVER

Unlike previous cycles, sustainability is now central; ESG is now commercial, not charity.

- ~60% of regional electricity already from renewables (global average ~30%).
- LAC is one of the world's most climate-exposed regions. Hence, strong climate commitments under the Paris Agreement.
- IDB estimates \$50B/year is needed for water security, resilient transport, and climate-proof cities.
- LAC holds 50% of the world's biodiversity. Carbon markets and natural capital = new revenue streams.
- Global investors seeking responsible growth opportunities



Energy Transition Readiness



Source: World Economic Forum. October 2025

CASE FOR SUTAINABLE INFRASTRUCTURE

Better risk-adjusted returns + climate resilience + community impact

- Infrastructure + ESG = Competitive Returns
- Studies show sustainable projects outperform on a risk-adjusted basis
- Creates social impact + jobs + community assets
- Accelerates SDG and decarbonization goals



WHY INFRASTRUCTURE WINS?

The definition of infrastructure is expanding and evolving, driven by global population growth, economic development, and technological advances.

- Stable Long-term cash flows
- Inflation-linked long-term cash flows
- Lower volatility than equities in emerging markets
- Essential services = stable demand
- Strong downside protection via real assets

Traditionally, infrastructure referred to physical assets such as roads, ports, and bridges. Today, modern infrastructure includes elements that support innovations such as renewable energy, digital connectivity, and electrified mobility. McKinsey



WHAT IS HAPPENING IN THE REGION?



BRAZIL



- As the **largest economy in the region**, Brazil has an enormous need for infrastructure, especially in sectors such as transportation, energy, and drinking water.
- The **Investment Partnerships Program (PPI)** has been a government priority to promote infrastructure through PPPs in sectors such as highways, airports, ports, and railways.
- **#1 wind market** in LATAM, expanding transmission lines
- First national BESS auction in 2025 to contract 300 MW with 4-hour discharge. BESS market reaching ~US\$3.8 billion by 2030

MEXICO



- Market with **Regulation-Driven Growth**
- **New Grid Code** mandates that all new solar and wind plants must include BESS equal to 30% of generation capacity, with at least 3 hours of storage. ~574 MW of batteries by 2028.
- Industrial energy demand rising due to **nearshoring** (Bakers Institute, 2024).

CHILE



- One of the **most stable economies** in the region, which attracts investors to long-term infrastructure projects.
- Leader in **renewable energy** in LATAM.
- Global leader in green **hydrogen pilots**.
- Holds strategic geological potential for **rare earths**,



WHAT IS HAPPENING IN THE REGION?



DOMINICAN REPUBLIC



- Government taking a strategic approach to the energy sector, with the goal of **moving the country from middle to high-income status by 2036**.
- Sectors such as **mining and data centers** are also priorities within its development agenda.
- A new tender for 600 MW is anticipated and 2,000 MW with definitive concessions granted.

COLOMBIA



- Government developing **sustainable infrastructure projects** with the support of MDBs such as the IDB in urban infrastructure, drinking water, and sanitation.
- Focus on sustainability with **green strategies** that attract sustainable investors in wind and solar energy.

PERU



- With rapid population growth, Peru faces significant needs in **urban infrastructure**, such as housing, potable water, sanitation, and transportation.
- The country has **improved its regulatory framework** to make Public-Private Partnerships (PPPs) in the transportation sector more attractive.



INVESTMENT VEHICLES & CAPITAL FLOWS



PPPs, blended finance, sovereign funds, green bonds, private infra funds

- Public-Private Partnerships (PPPs) expanding regionally.
- Green and sustainability-linked bonds growing double digits.
- Development bank guarantees reduce risk.
- Private infra funds scaling project finance.

BRAZIL - Sustainable funds grow 48% in a COP-30 year, but overall representation remains modest
According to Anbima, sustainable investment funds reached a net worth of R\$ 36.8 billion (approx. 6.88 billion USD) in July 2025.

Source: Associação Brasileira das Entidades dos Mercados Financeiro e de Capitais - Anbima

OPPORTUNITIES FOR THE FINANCIAL SECTOR

- Investment in key projects such as sustainable infrastructures
- Innovation in financial products: Green bonds, infrastructure investment funds, structured financing schemes
- Public-private collaboration: Leveraging PPP schemes and joint financing with multilateral organizations



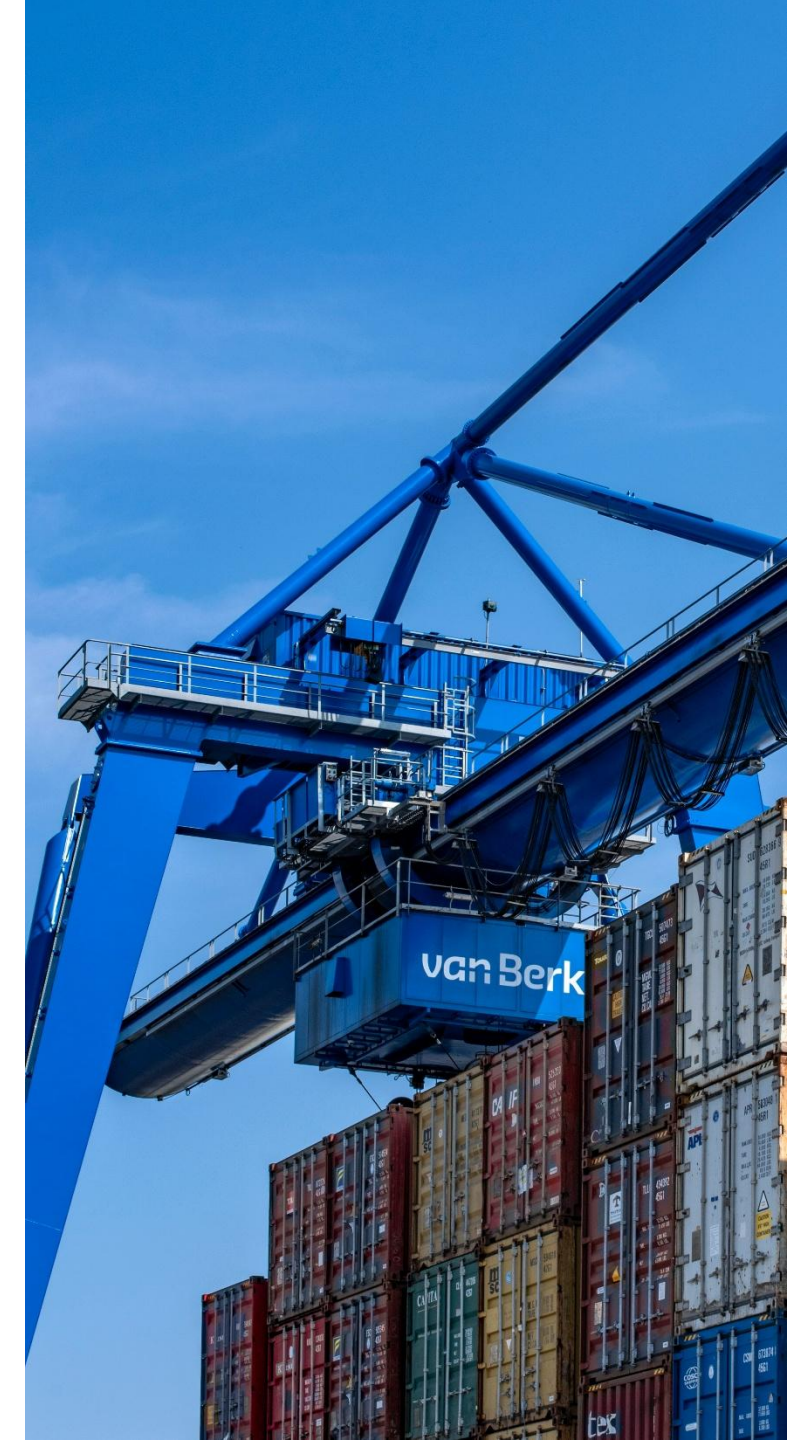
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WHY SWISS INVESTORS ARE INTERESTED?

77% of Swiss institutional investors plan to increase impact investment allocations by 2026 (PwC Switzerland).

- Impact + returns no longer a trade-off
- Article 8 and 9 strategies seeking credible impact assets
- Portfolio diversification into real assets
- Net-zero commitments driving climate-aligned investment

Switzerland is Europe's #2 center for sustainable finance, after Luxembourg (SwissBanking 2024).



WHAT'S NEXT?

Q&A, Collaboration opportunities



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- CIFI positions itself as a **strategic player in the development of sustainable infrastructure projects**, offering innovative solutions and the capacity to mobilize funds.
- CIFI's ability to manage projects comprehensively, **advising on project bankability through execution**, contributes to accelerating investment and E&S impact in the region.
- In an environment with high demand for modern and sustainable infrastructure, CIFI becomes a **key partner** to capitalize on these opportunities with tailored solutions and a long-term vision.



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ABOUT CIFI



Leading investment platform funding responsible and impactful energy and infrastructure projects projects that promote wellbeing in LATAM

PROVEN TRACK RECORD IN THE REGION

- 3** Business lines (Loan Structuring & Advisory, Financing, Asset Management)
- 22** Years of proven track record
- 50** Employees in LATAM & the Caribbean
- 220 +** Projects in energy & infrastructure
- \$2.3 BILLION** In disbursements
- \$21.0 BILLION** In mobilized capital
- \$724 MILLION** Assets Under Management (AUM)



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