Electricity generation increases by more than the current power output of India; coal emerges as the fuel of choice, accounting for 58% of the growth.
Flexible Power Systems

Myanmar
Abundant hydropower and natural gas resources, their development is vital to reduce poverty and support economic growth.

Lao PDR
Aims to become the hydropower “battery” of Asia; electricity exports have been increasing sharply.

Vietnam
Significant renewable and fossil energy resources, but rapidly growing energy demand underlies a shift towards imports; developing a nuclear power programme.

Thailand
Second-largest energy consumer in ASEAN and heavily dependent on energy imports due to limited energy resources; aims to diversify electricity generation.

Philippines
Fast rising electricity demand requires expanded supplies; strongly reliant on energy imports, though it is the world’s second-largest geothermal producer.

Cambodia
Low levels of electrification, although improving; potential to develop oil and gas resources.

Malaysia
Third-largest energy consumer in ASEAN with relatively high per-capita consumption; significant oil and LNG exporter, but production is maturing.

Singapore
Strategically situated, it has become Asia’s key oil trading and refining hub (the third-largest in the world) and could become a major gas hub.

Brunei Darussalam
Among the wealthiest countries in the world on a per-capita basis, thanks to oil and LNG exports.

Indonesia
Largest energy consumer in ASEAN, with massive scope for growth; it exports steam coal (the world’s largest) and LNG, and is an increasing importer of oil.

This map is without prejudice to the status of or sovereignty over any territory, to the delimitation of international frontiers and boundaries, and to the name of any territory, city or area.
ASEAN to represent 3.4% of global renewable electricity generation by 2020

By 2020 renewables to account for 23% of total ASEAN electricity generation
ASEAN energy efficiency gains and unrealised potential by sector in the New Policies Scenario, 2012-2035
ASEAN Gas – demand and import growth

The region exports 5% of its gas in 2035, generating USD 9 billion in revenue.
Different pricing systems lead to widely different price levels for natural gas

- Large gap between Asian, European and HH gas prices
- The dominance of oil indexation in the pricing systems means Asian buyers will always have to pay higher for natural gas
LNG in Asia

- Encourage trading
- Encourage investment and cooperation for gas infrastructure
- Promote best practices on regulation
- Develop diversified and flexible price mechanism
- Increase intra-region LNG trading to enhance regional energy security
- Initiate discussions on pricing trends and strategies
- Identify impact of continuing gas subsidies on creation of trading hub
The IEA – ASEAN’s partner

- Finalise the Development Prospects for the ASEAN Power Sector Study in 2015
- Continue the ASEAN-IEA Dialogue on Gas Markets
- Provide advice on the operationalization of APSA
- Build on the 20 Energy Efficiency Policy Recommendations for Southeast Asia with 1-2 dedicated workshops in 2015