

INDONESIA GAS DOMESTIC DEMAND, INFRASTRUCTURE DEVELOPMENT AND CHALLENGES

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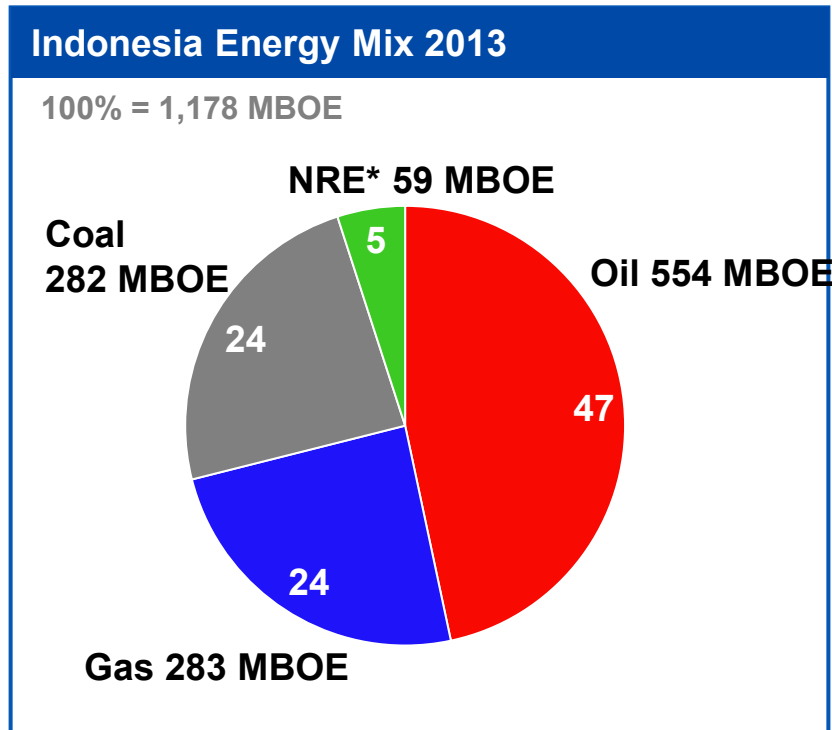
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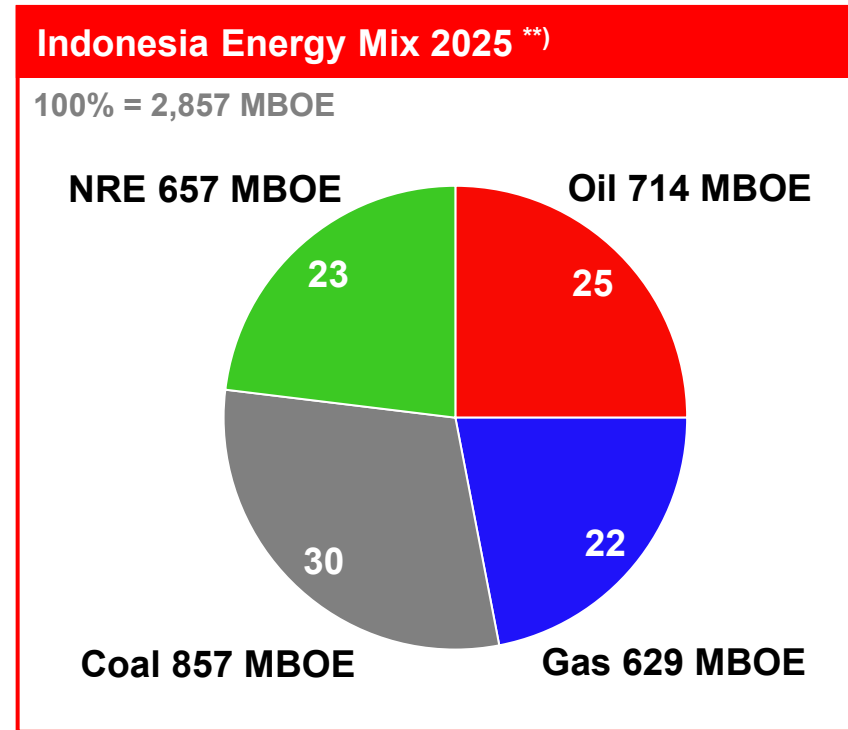
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Indonesia's Primary Energy Consumption



* New & Renewable Energy



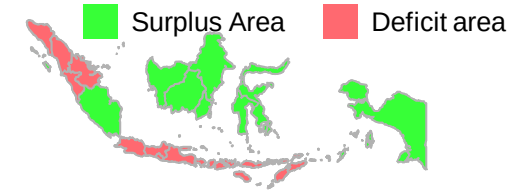
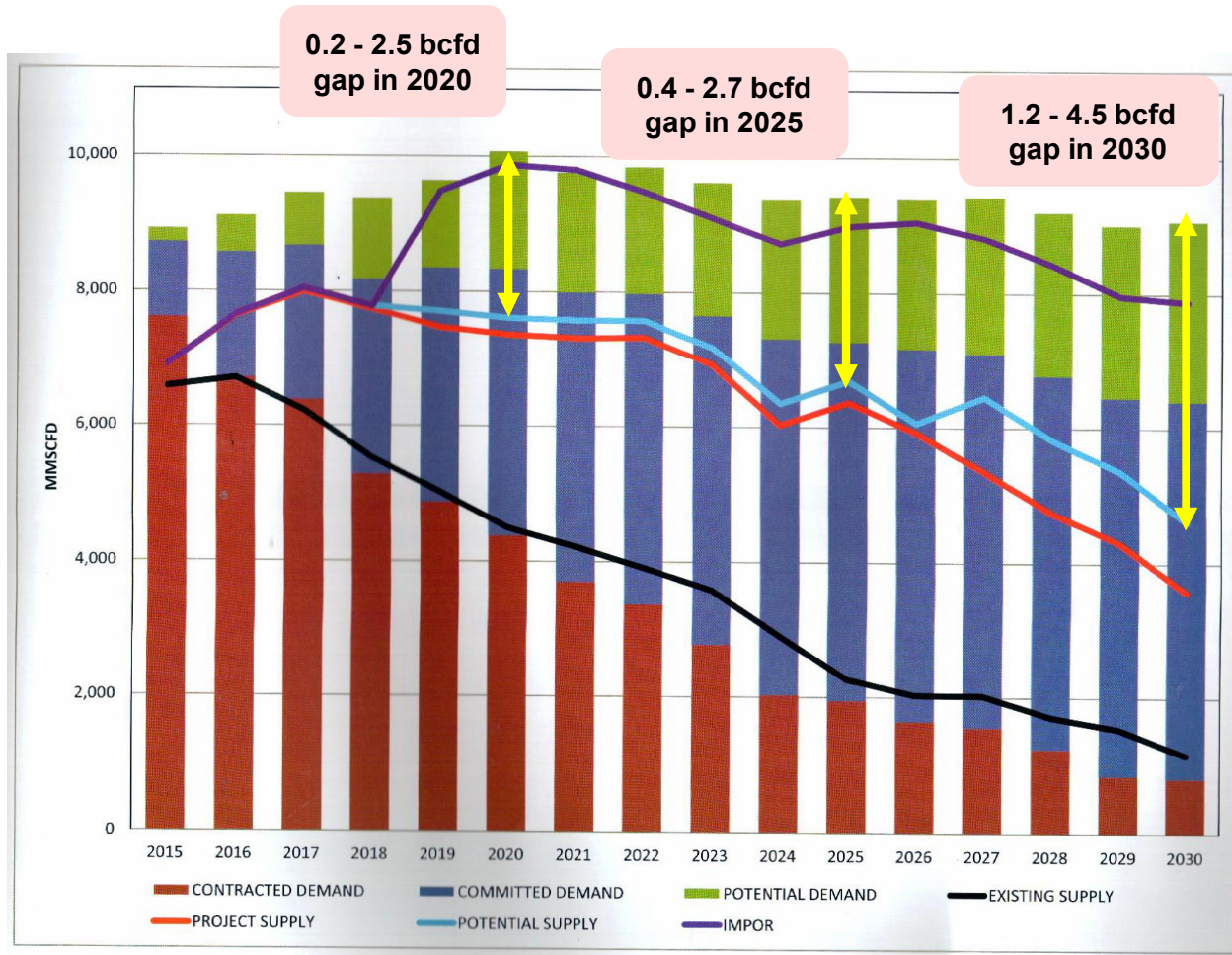
** PP No. 79 / 2014 : National Energy Policy



- ❖ Gas and NRE are playing a significant role for Indonesia Energy Mix
- ❖ In 2025, the oil portion is expected reduced significantly from 47% to 25% but in term of volume is still significant.
- ❖ The portion of gas will increase 128% from 283 to 645 MBOE, and NRE is significantly increased from 59 to 674 MBOE

Indonesia Challenges in Supplying Gas is Infrastructure

Indonesia Gas Balance 2015 - 2030



Å In general, the demand is expected to grow 3.8% per year until 2030

İ Gas is expected to substitute oil fuel in electricity and industrial sector, but oil fuel will be still dominant in transportation and petrochemical sector

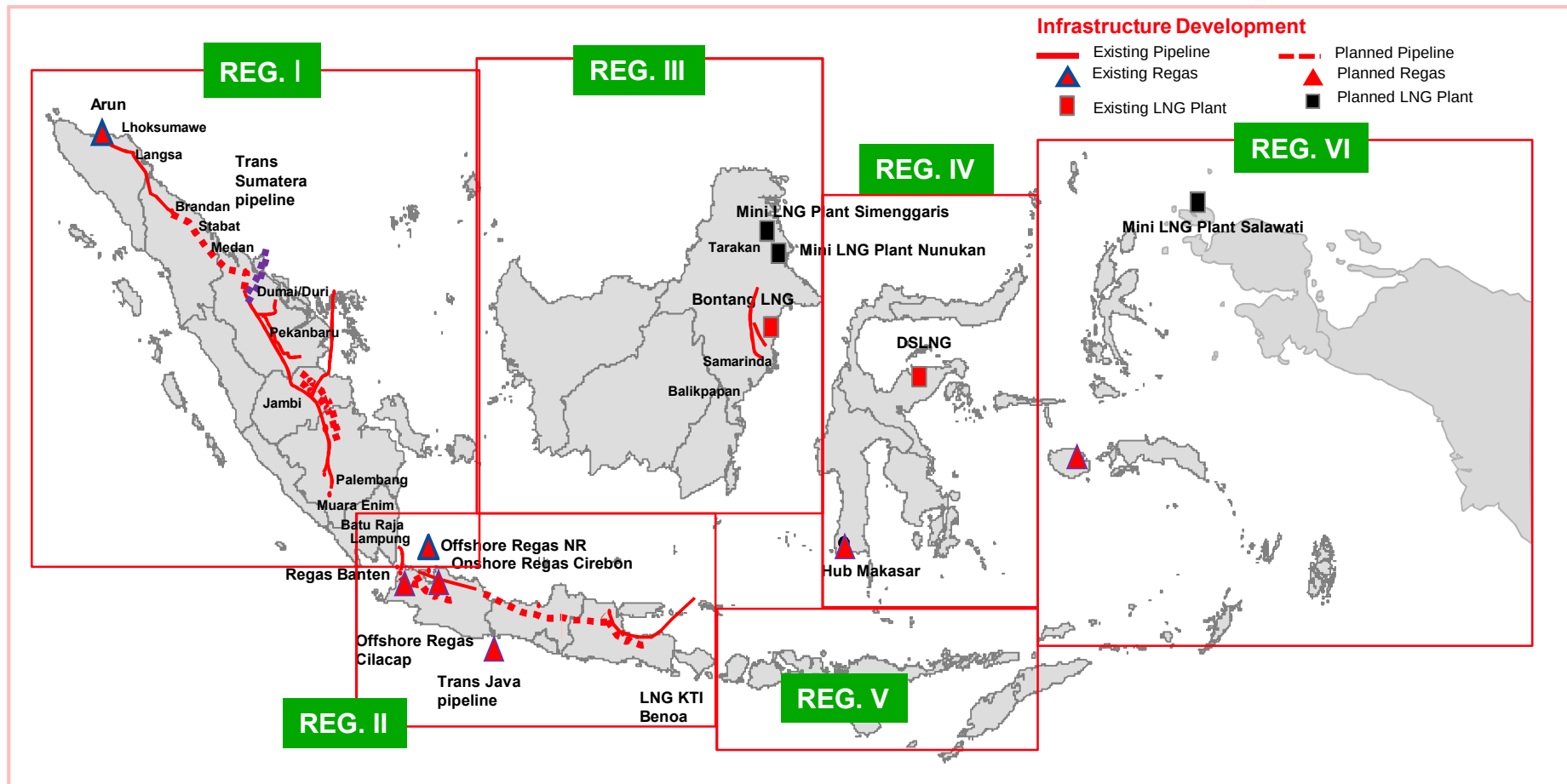
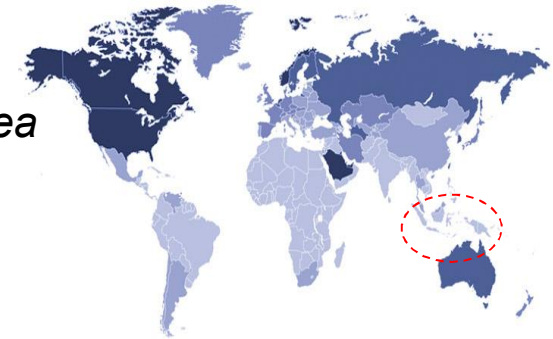
İ The gas demand growth ~4% per year when the oil demand growth 2.1% per year

İ ~70% gas demand comes from electricity and industrial sector

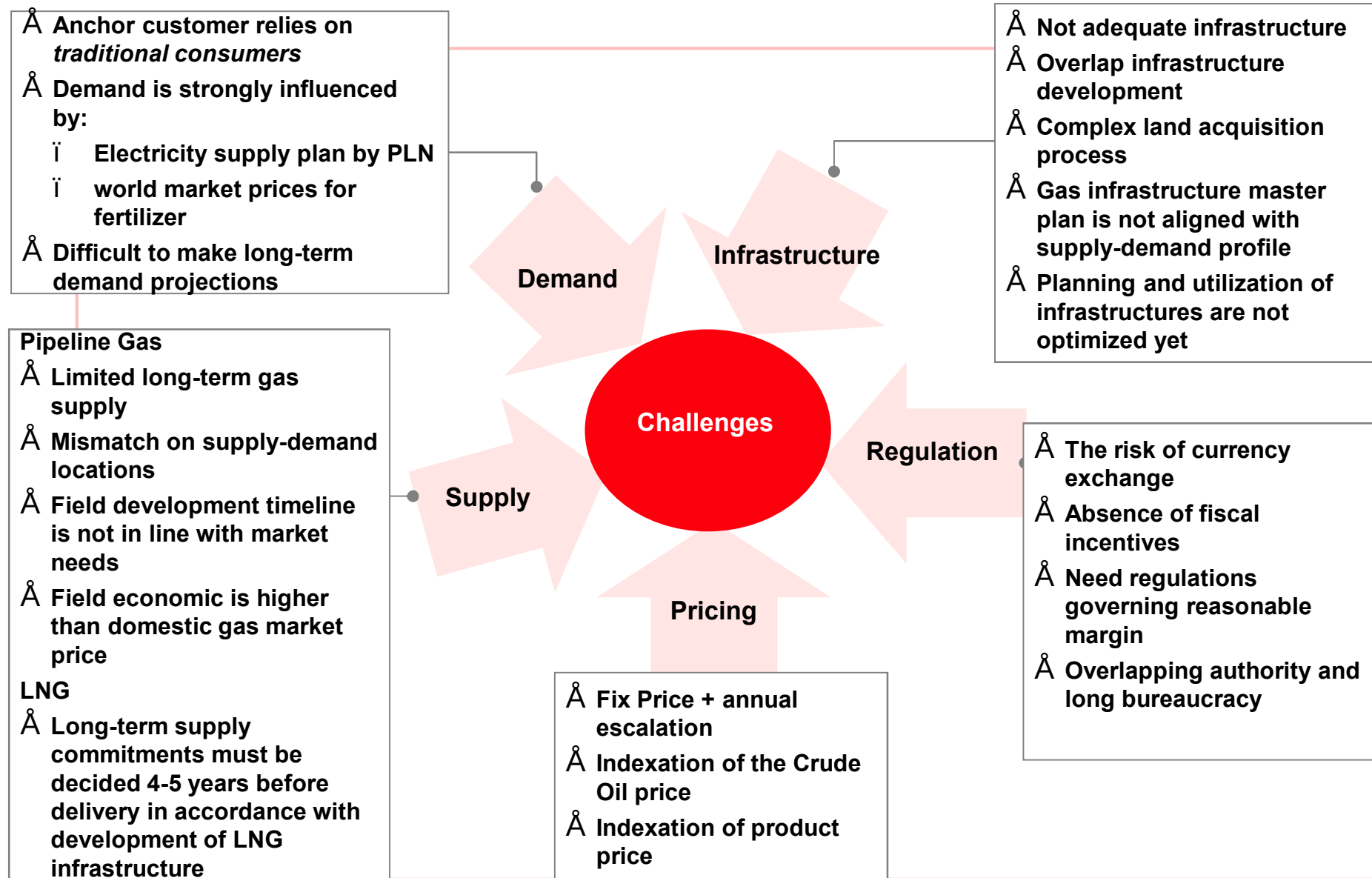
İ ~55% gas demand comes from Java

Gas Infrastructure Development

Pertamina develops gas infrastructure to bring gas from surplus area to deficit area to satisfy gas domestic demand



Gas Industry Challenges in Indonesia



Thank you

