

# Indonesia Utilities Industry Report - H2, 2013

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## Abstracts

This report profiles Indonesia's utilities and energy industry and discusses market trends through H2 2013 and the current outlook. It also includes financial summaries for leading sectoral players including PLN, PGN, Indika Energy, and BIPI.

The utilities industry contributed approximately 0.79% to Indonesia's total GDP in 2012. The sector grew from IDR 15.39 trillion in 2002 to IDR 65.13 trillion in 2012, representing a compounded annual growth rate (CAGR) of 15.5%. The electricity sector dominated the industry with a 65% share in 2012, followed by the gas and water sectors. The country's demand for water resources is increasing, mainly due to the growing population and development in the country. Although water resources in Indonesia account for about 6% of the total water resources in the world and about 21% in the Asia Pacific, lack of clean water is still a serious problem in Indonesia.

Indonesia's proven oil reserves were estimated at 500 MT in 2012, while proven gas reserves stood at 2.9 trillion cubic meters. Total electricity supply has been increasing rapidly since the past decade, from 108.36 trillion KWH in 2002 to 200.32 trillion KWH in 2012. The Indonesian power sector is expected to perform well in the medium term, with strong and growing demand. Indonesia expects new and renewable energy to contribute approximately 17% to the total national primary energy mix by 2025, up from less than 5% currently. Furthermore, the country also plans to build 250 solar-powered plants.

### Key Points:

Currently, Indonesia's largest electricity provider Perusahaan Listrik Negara PT (PLN) has two major electricity sources, namely self-produced electricity and electricity purchased from independent power producers (IPPs). By the end of 2012, PLN had a total installed generation capacity of 32,901 MW, an increase

of 12% over the previous year.

The report also discusses leading players including Perusahaan Gas Negara, PT (PGN), Indika Energy Tbk, PT (Indika Energy), and Benakat Petroleum Energy Tbk, PT (BIPI).

Demand for electricity in Indonesia is projected to grow at a pace of more than 8% per year until 2020.

Indonesia plans to more than triple the share of new and renewable energy to the total national primary energy mix by 2025.

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