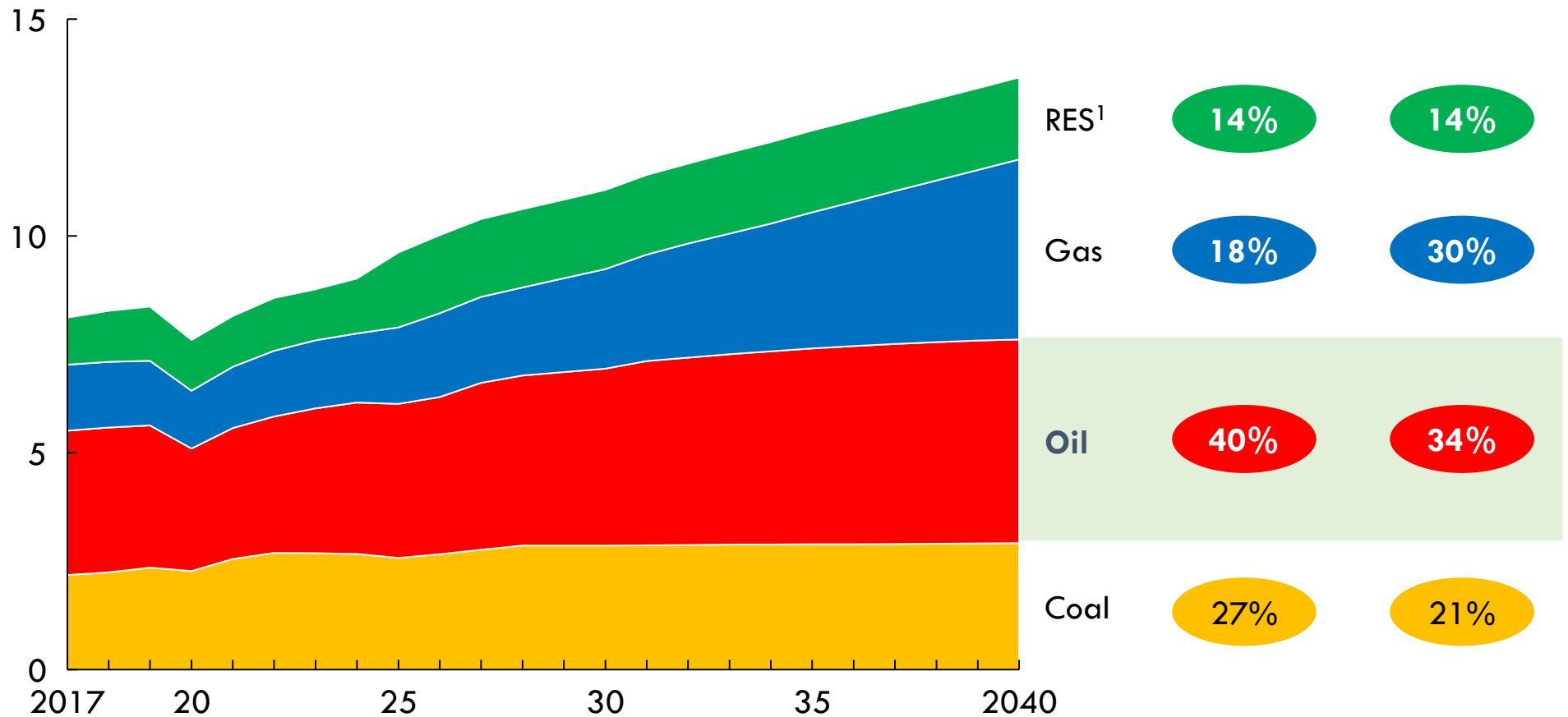


# Global Coal and Oil demand plateau towards 2035+, while Gas and Renewable Energy continue to increase until 2040

## Primary energy demand per fuel<sup>1</sup>

Million TJ



## Insights

- **Gas is the only fossil fuel to increase its share in the energy mix**, while coal and oil see a reduced relative role by 2035
- **Oil demand is expected to plateau towards 2035+**, hence decreasing its share in the energy mix

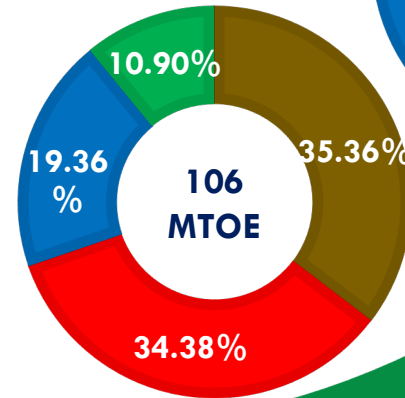
<sup>1</sup> Excluding biomass

# Gas usage in Indonesia is targeted to continuously rise

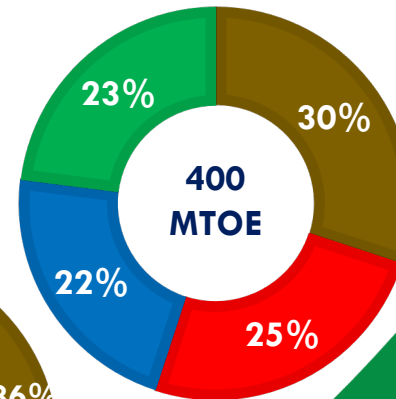
Indonesia National Energy Mix - National Energy Council

National Energy Policy	2025	2050
Gas Share	22%	24%
Renewable Energy Share	23%	31%
Primary Energy Supply	> 400 MTOE	> 1.000 MTOE
Generating Capacity	> 115 GW	> 430 GW
Electricity Consumption/capita/year	2,500 kWh	7,000 kWh
Electrification Ratio	~100%	~100%
Primary Energy Utilization	1.4 TOE/capita	3.2 TOE/capita

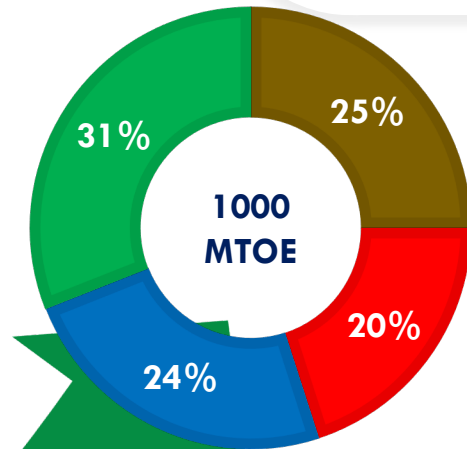
**1H 2020 CONDITION\***



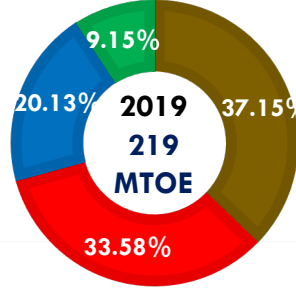
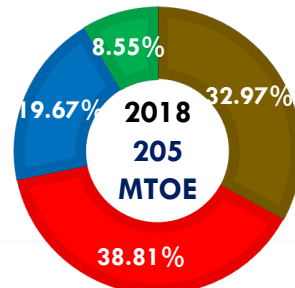
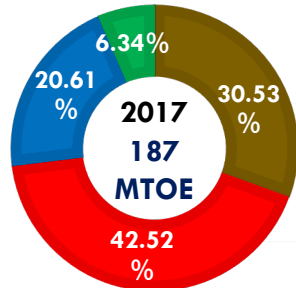
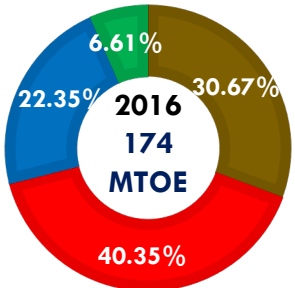
**2025 TARGET**



**2050 TARGET**



- Coal
- Oil
- Gas
- Renewables



\*Coordination result of National Energy Council General Secretariat, The Center for Data and Information, and EMR technical unit, Aug 2020

# Pertamina Group is appointed to provide supply and gas infrastructure in 55 spots

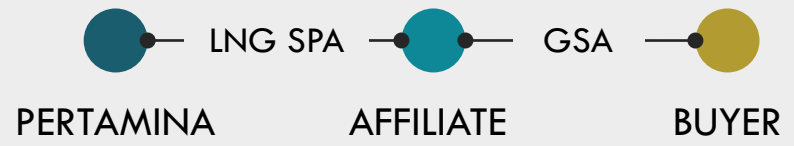


Minister of Energy and Mineral Resources Decree No. 13 in 2020

The implementation is planned to be carried out in stages based on the Power Plant readiness:

- 1. Quick Win : 3 Power Plants, COD Target : 2020 & 2021
- 2. Operation & Construction : 30 Power Plants, COD Target : 2022
- 3. Development Plan : 22 Power Plants, COD Target : Depending on Power Plant COD

### BUSINESS SCHEME

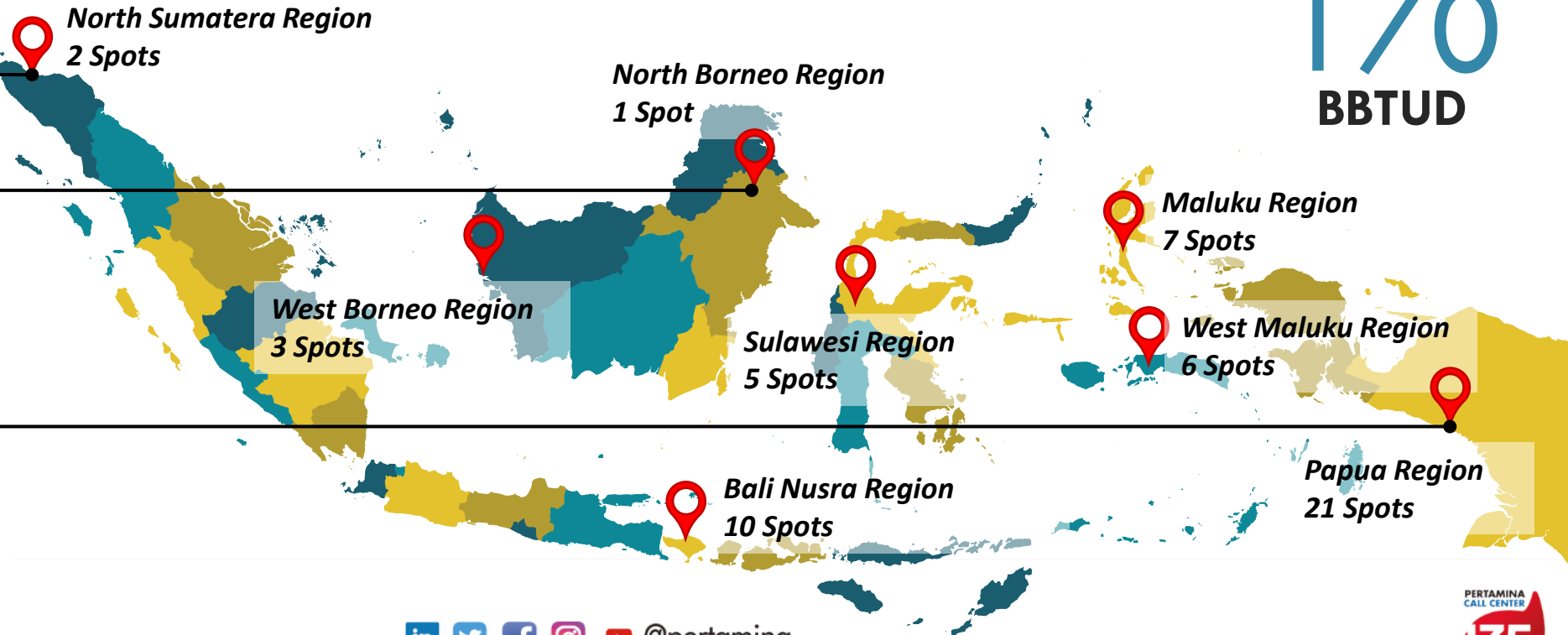


### QUICK WIN SPOTS

**Nias (LNG) - 2021**  
 Volume : 4-5 BBTUD  
 Infrastructure :  
 • LNG Filling Station  
 • ISO Tank  
 • Truck & Trailer, etc

**Tanjung Selor (LNG) - 2021**  
 Volume : Up to 2 BBTUD  
 Infrastructure :  
 • LNG Filling Station  
 • ISO Tank  
 • Truck & Trailer, etc

**Sorong (Pipe Gas) - 2020**  
 Volume : 4 BBTUD  
 Infrastructure :  
 • Pig Receiver (Tbc)  
 • Pipeline  
 • Utility Interconnection, etc



### EST. TOTAL DEMAND

UP TO  
**170**  
BBTUD

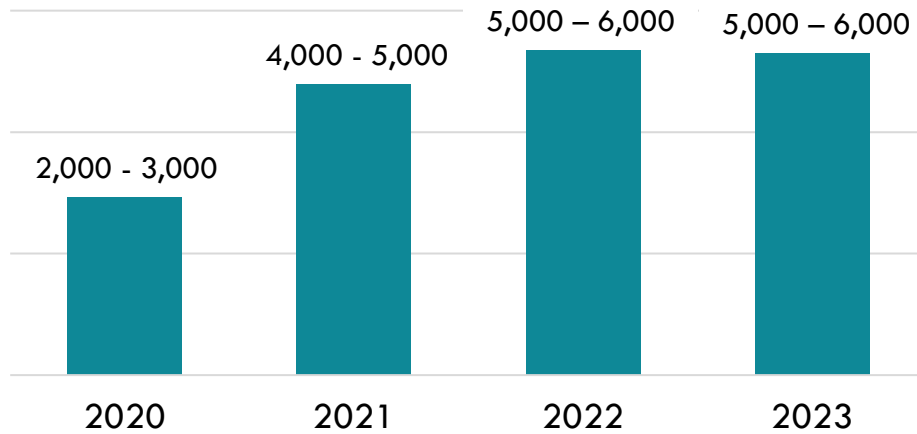


Source : Internal Pertamina Group

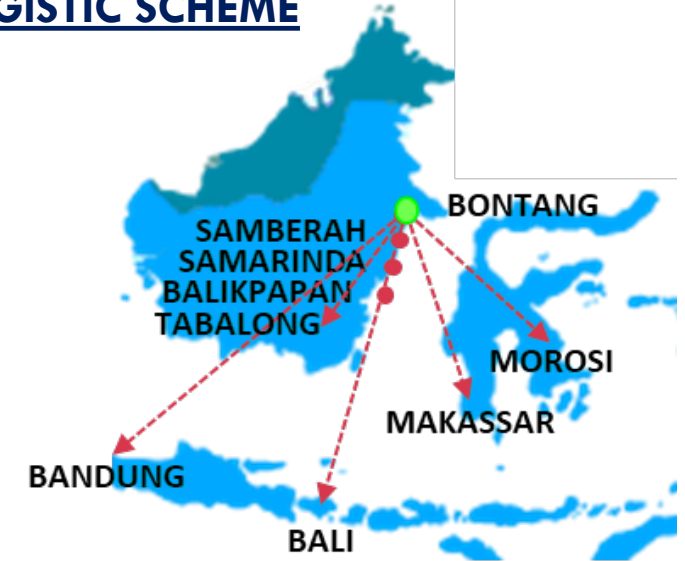
# Pertamina Group is supplying Retail LNG for Domestic Market



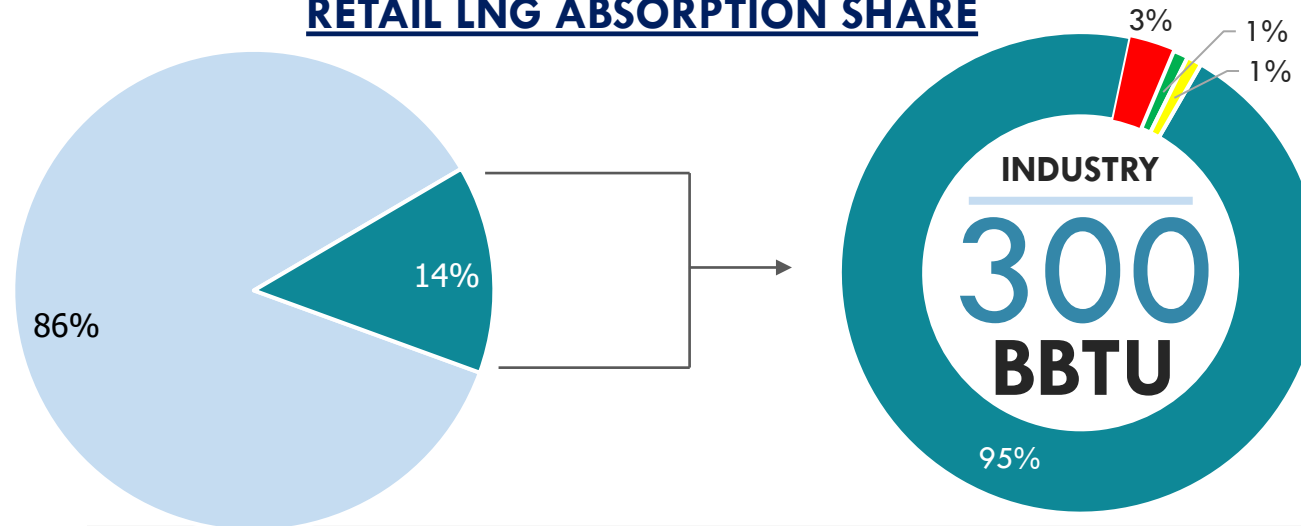
## RETAIL LNG GROWTH (BBTU)



## LOGISTIC SCHEME



## RETAIL LNG ABSORPTION SHARE



- Remote Power Plant
- Non-Power Plant
- Industry
- Truck
- Hotelier & Café
- Hospital