

Renewable Energy Sector Trade Mission

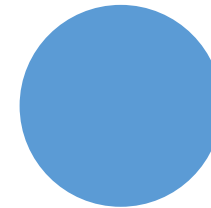
Malaysian Market Overview

27th -29th November 2018

Andalusia

- Key Economic Indicators
- Energy Supply/Demand
- Electricity Generation Capacity Mix
- Fuel Mix in Power Generation
- Energy-related Laws and Regulations
- Energy Policy
- Electricity Supply Industry Structure

Presentation Outline

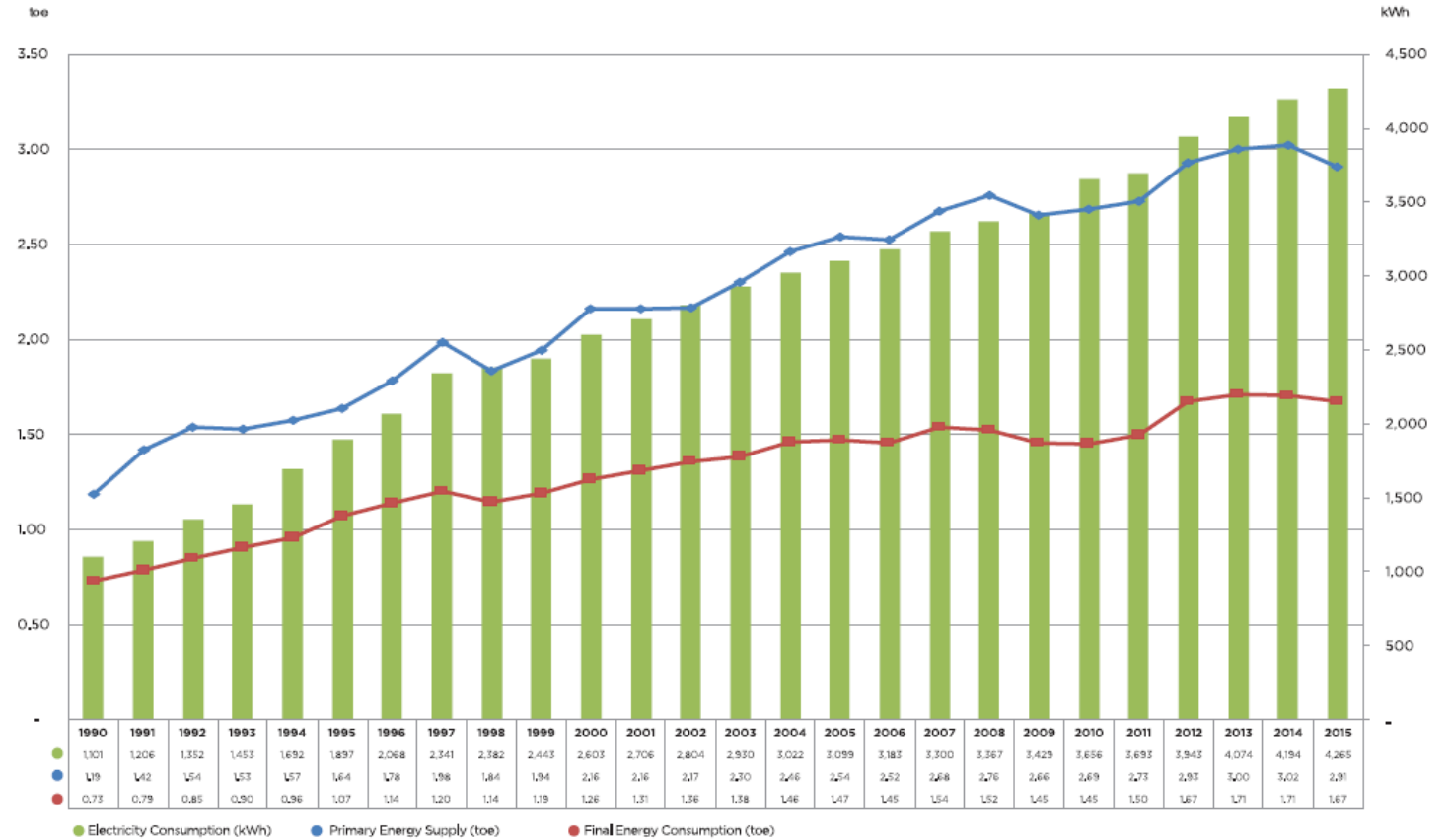


Key Economic Indicators

Population / Labour Force	32.1 million / 14.9 million
GDP / GDP Growth	RM 1,174.3 billion / 5.9%
Per Capita Income	RM 40,093 (US\$9,556)
Inflation Rate	3.7%
Unemployment	3.4%
Total Export (f.o.b.)	RM935.4 billion
Total Import (c.i.f.)	RM836.4 billion
Major Export Products	Electrical & electronic products, Petroleum products, Chemical & chemical products, Palm oil & palm-based products, Manufactures of Metal
Major Export Markets	China, Singapore, USA, Hong Kong SAR, Japan, Thailand

Energy Supply/Demand

- Energy Resources
 - Oil: 5.907 bil. bbl (24 yrs)
 - Gas: 100.413 TSCF (42 yrs)
 - Coal : 1,279 mil tonnes (low grade)
 - Hydro : 25,000 MW
 - Non-solar RE: ~2660 MW
 - Solar : Unlimited

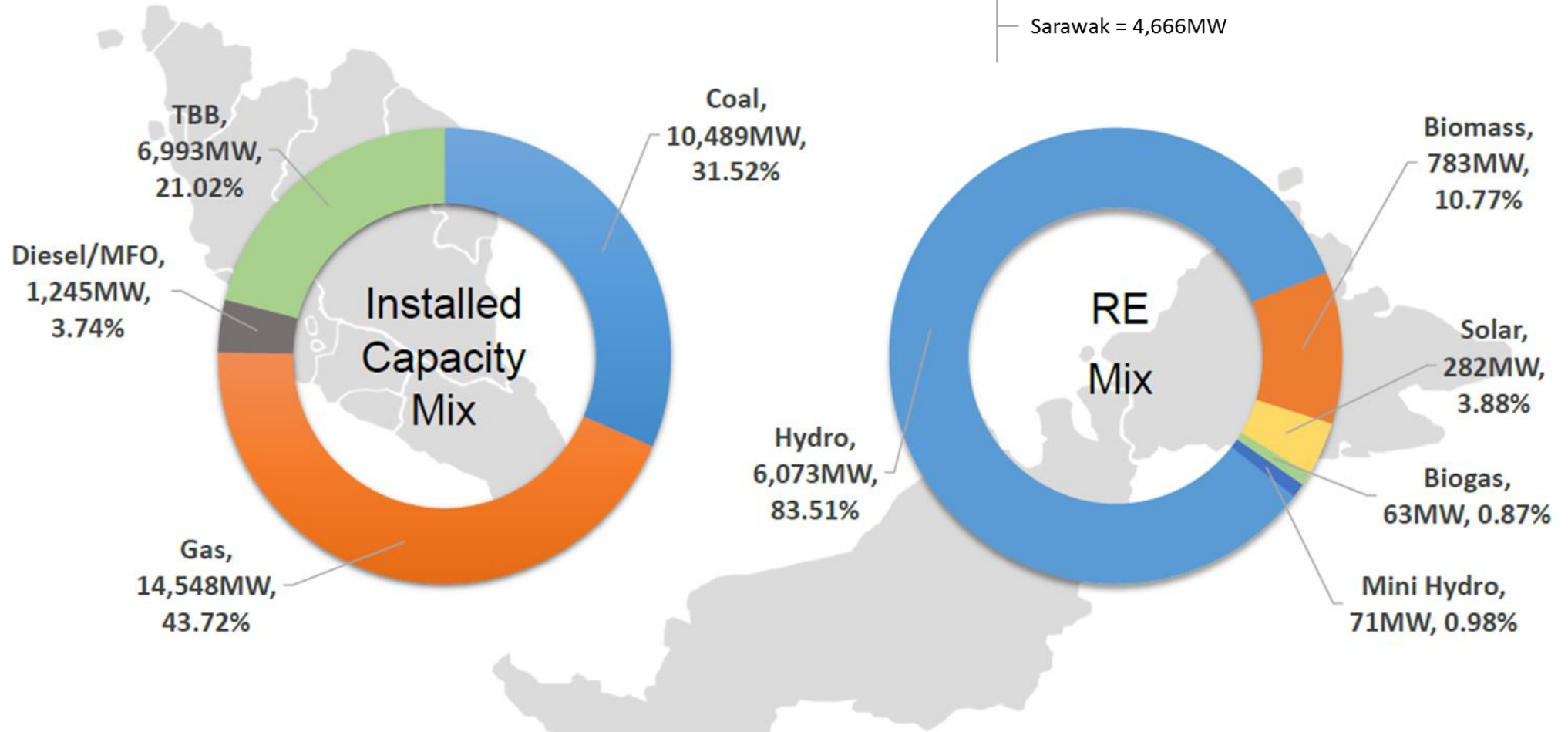


Source: Population data from Department of Statistics Malaysia
 Note: Based on Energy Commission calculation

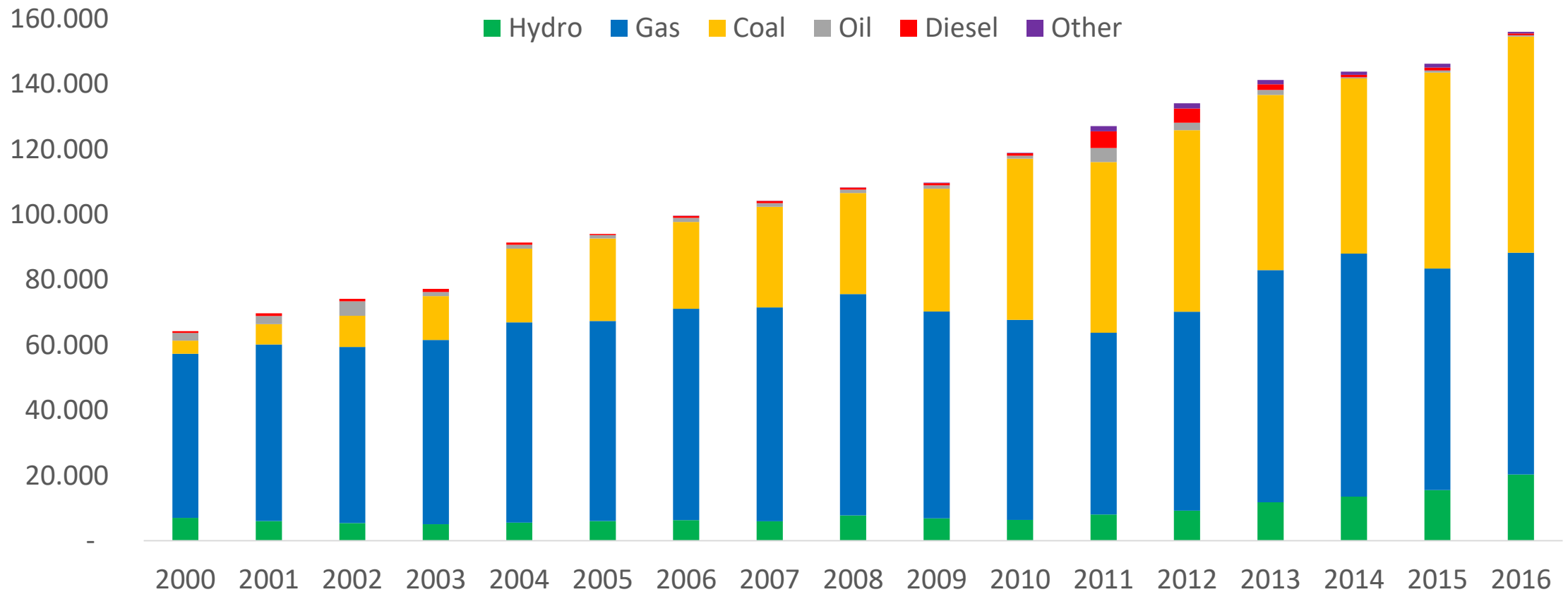
Electricity Generation Capacity Mix

MALAYSIA INSTALLED CAPACITY 33,275MW

- Peninsular = 26,429MW
- Sabah = 2,179MW
- Sarawak = 4,666MW



Balanced Fuel Mix for Reliable Supply of Electricity



Energy-related Laws and Regulations

Petroleum Development Act 1974

- Petroleum Regulations 1974

Sustainable Energy Development Authority Act 2011

Energy Commission Act 2001

- Energy Commission (Amendment) Act 2010

Environmental Quality Act 1974

- Environmental Quality (Clean Air) Regulations 2014

Renewable Energy Act 2011

- Regulations, Rules, Orders and Guidelines published pursuant to the Act

Electricity Supply Act 1990

- Electricity Supply (Amendment) Act 2015
- Electricity Regulations 1994 and subsequent Amendments
- Efficient Management of Electrical Energy Regulations 2008
- Standards, Guidelines and Circulars published pursuant to the Act

Gas Supply Act 1993

- Gas Supply (Amendment) Act 2016
- Gas Supply Regulations 1997 and subsequent Amendment
- Standards, Guidelines and Circulars published pursuant to the Act

Policies that shaped the Malaysia Electricity Supply Industry

National
Petroleum Policy
(1975)

National Energy
Policy (1979)

National Depletion
Policy (1980)

Four Fuel
Diversification
Policy (1981)

Five Fuel Policy
(2001)

National Policy on
the Environment
(2002)

National
Renewable Energy
Policy and Action
Plan (2010)

National Energy
Efficiency Action
Plan

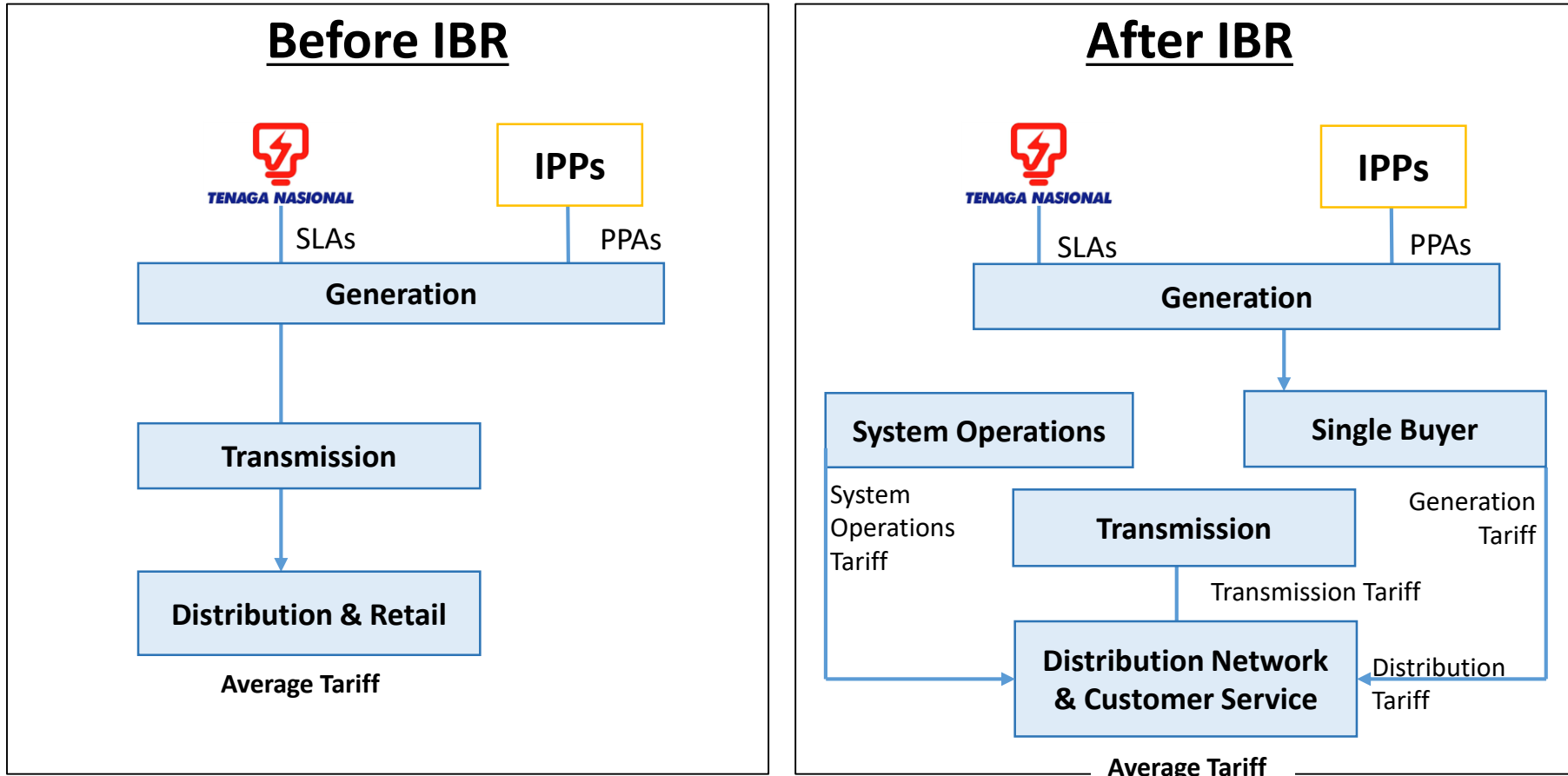
11th Malaysia Plan

Chapter 6 on Pursuing green
growth for sustainability and
resilience

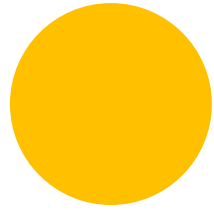
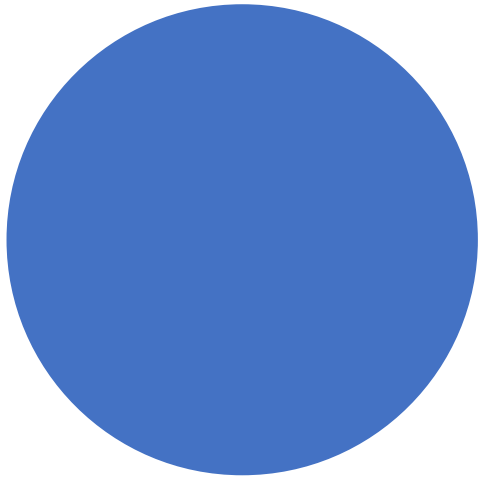
Reduction in GHGs emission intensity
of GDP compared to 2005 level

- Comprehensive demand side
management master plan
- 2080MW RE installed capacity

Electricity Supply Industry Structure in Peninsular Malaysia



Introduction of Incentive Based Regulation mechanism to improve utility efficiency and provide greater transparency for the benefit of consumers



Thank You

Mohd Rizal bin Ramli
Deputy Director (System Operations)
Energy Commission
Malaysia