



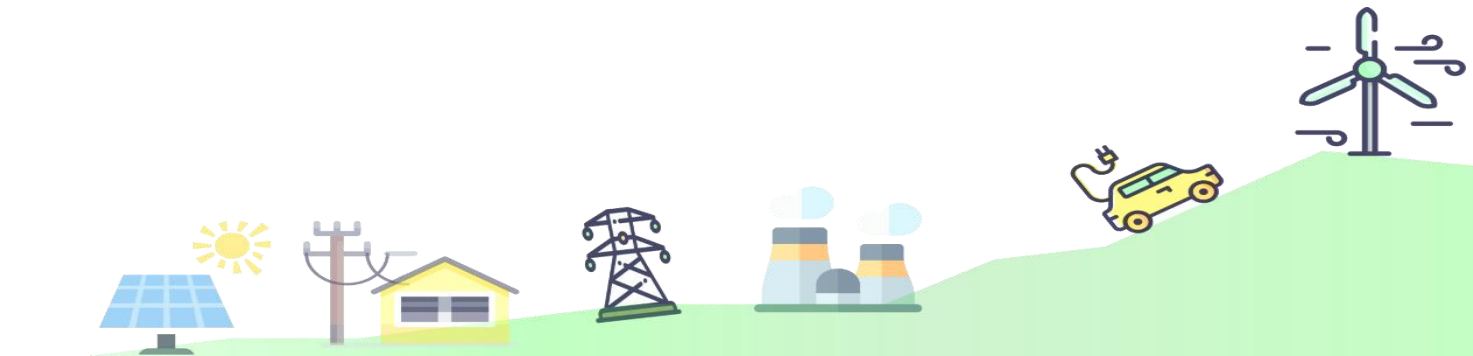
# Impact of Covid-19 on Indonesia Energy Sector

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MEMR

ERIA Webinar

10 September 2020



# Major Impacts of Covid-19 on Indonesia

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- Contraction on economic growth
  - Manufacturing industries deeply affected
- Contraction on energy consumption
  - Electricity and fuel consumption growth decline
- Delay on the COD of some energy projects including RE
  - Due to logistic issues
- More electricity subsidies allocated for low income customers
- Subsidy for biodiesel
- GHG emission decreased



# Indonesia's economic outlook

Source	Before Covid-19	Latest
GOI	5.3	-1.1 to 0.2
ADB	5.2	-1.0
IMF	5.1	-0.3
WB	5.1	0.0

In 2<sup>nd</sup> quarter 2020, economic growth was – 5.3% due to the “lockdown”, yoy growth in 2020 is projected -1.1 to 0.2% contributed by domestic consumption

## Manufacturing sector outlook

Indicator	2019	2020	2021
Growth	3.8	<b>0.1</b>	4.7-5.5
GDP contribution (%)	19.7	<b>19.5</b>	19.6-19.8
Manpower (Million)	18.9	<b>17.4</b>	17.9
Export (USD Billion)	126.6	<b>114.8-117.2</b>	122.8-127.5

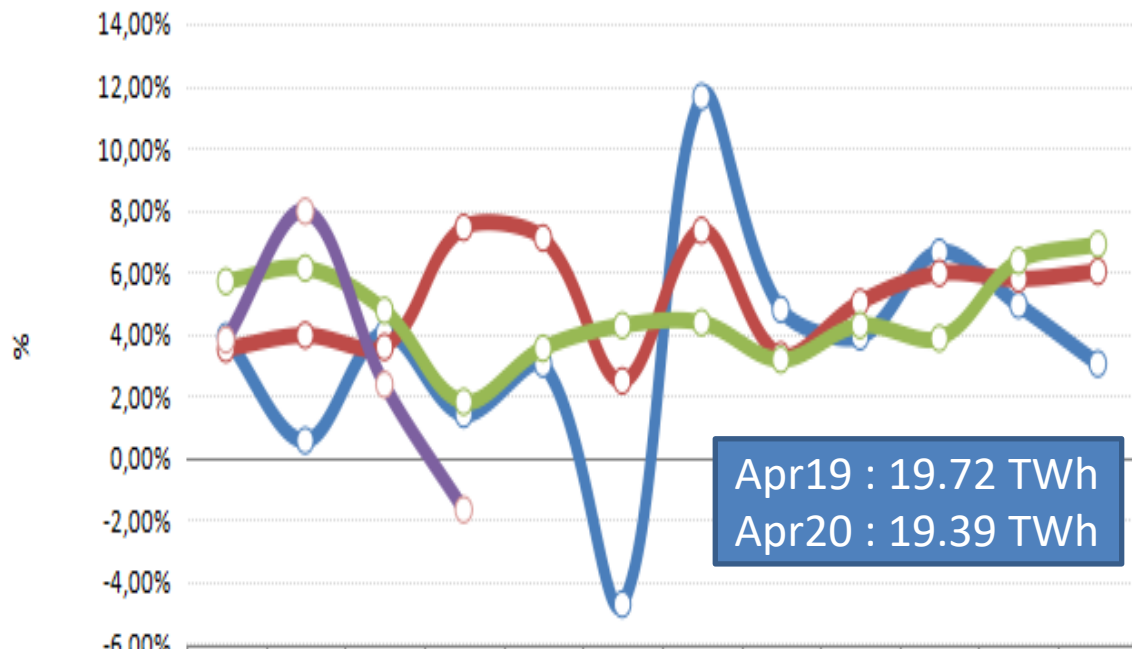
Around 60% of manufacturing industries hit hard by the pandemic, others are moderately affected due to high demand such as food and beverages and medicine/pharmacy

MOF, Bappenas, 2020



# Electricity consumption decreased in almost all sectors, with manufacturing sectors deeply contracted

Monthly Consumption Growth (%)

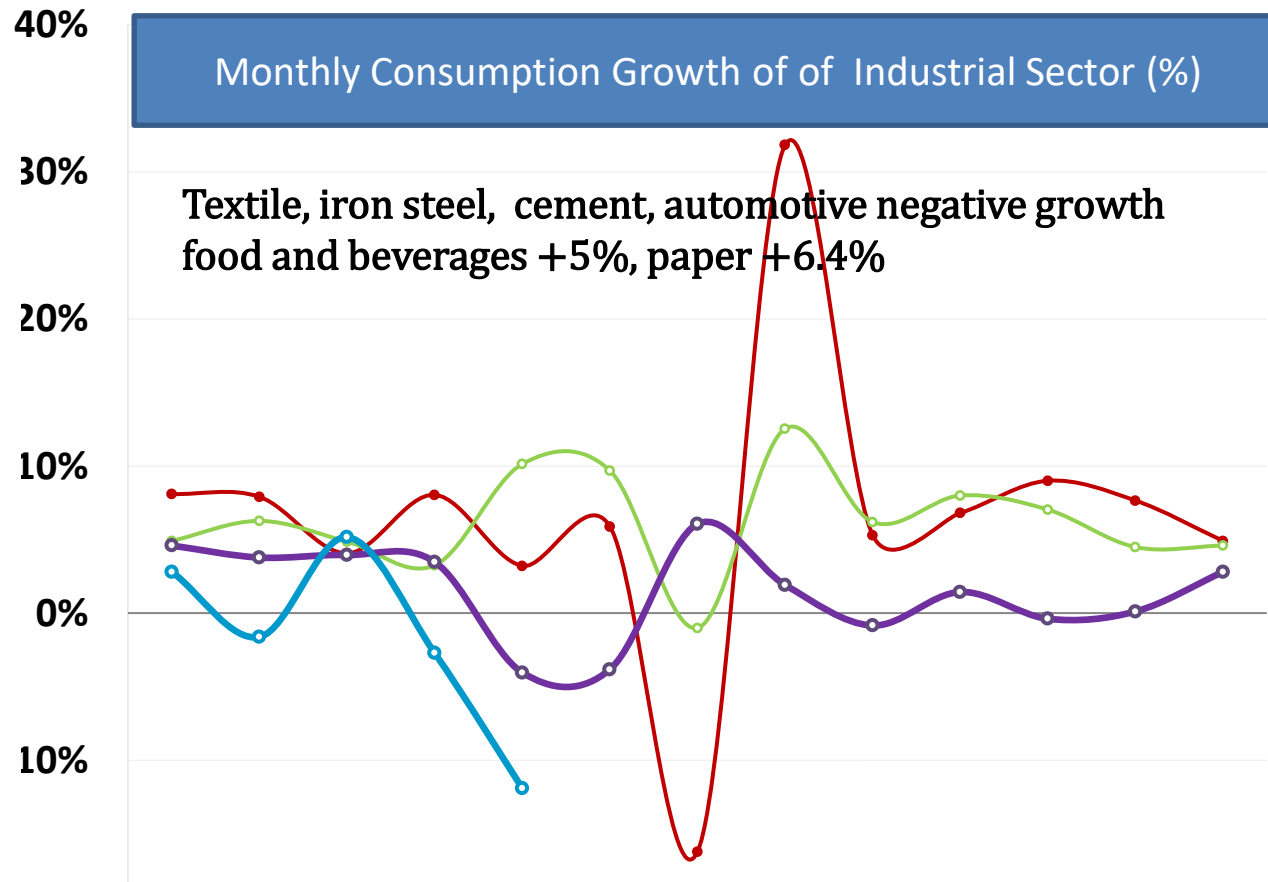


Apr19 : 19.72 TWh  
Apr20 : 19.39 TWh

	Jan	Feb	Mar	Apr	Mei	Jun	Jul	Agust	Sep	Okt	Nop	Des
2017 VS 2016	3,91%	0,55%	4,01%	1,40%	3,02%	-4,72%	11,64%	4,8%	3,9%	6,6%	4,9%	3,0%
2018 VS 2017	3,51%	3,95%	3,57%	7,42%	7,09%	2,48%	7,33%	3,3%	5,0%	6,0%	5,8%	6,0%
2019 VS 2018	5,69%	6,11%	4,75%	1,80%	3,53%	4,27%	4,36%	3,16%	4,27%	3,85%	6,35%	6,89%
2020 VS 2019	3,80%	7,95%	2,36%	-1,67%								

Monthly Consumption Growth of of Industrial Sector (%)

Textile, iron steel, cement, automotive negative growth  
food and beverages +5%, paper +6.4%



	Des	Jan	Feb	Mar	Apr	Mei	Jun	Jul	Agst	Sep	Okt	Nov	Des
2017	8%	8%	4%	8%	3%	6%	-16%	32%	5%	7%	9%	8%	5%
2018	5%	6%	5%	3%	10%	10%	-1%	13%	6%	8%	7%	4%	5%
2019	5%	4%	4%	3%	-4%	-4%	6%	2%	-1%	1%	0%	0%	3%
2020	3%	-2%	5%	-3%	-12%								

# Fuel consumption (gasoline) down 34% April 2020 compared to April 2019

- Due to “lockdown” especially in big cities
- In August, consumption was back nearly normal, especially in greater Jakarta

