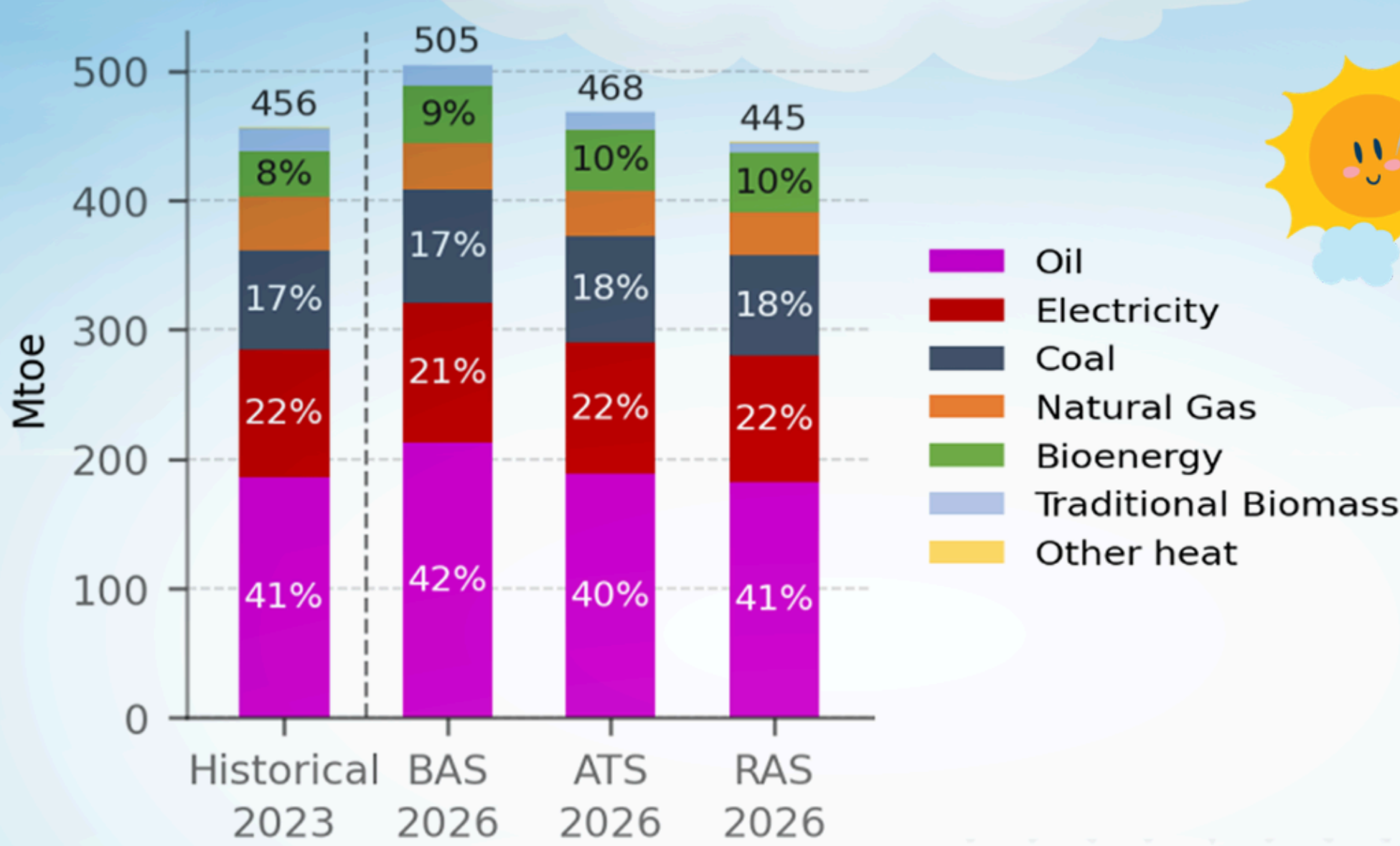


## ENERGY TRANSITION

COMPILED BY MARGARETH SEMBIRING

The demand for renewable energy in ASEAN is projected to increase modestly to 10% in 2026, signifying the region's continuing reliance on fossil fuels. Given that around half of imported oil in Southeast Asia originated from the Middle East, the closure of the Strait of Hormuz has put significant pressure on oil supply and prices in the region. Middle Eastern oil flows mainly to Thailand and Singapore, followed by Malaysia, Vietnam, the Philippines, Indonesia and Brunei Darussalam.

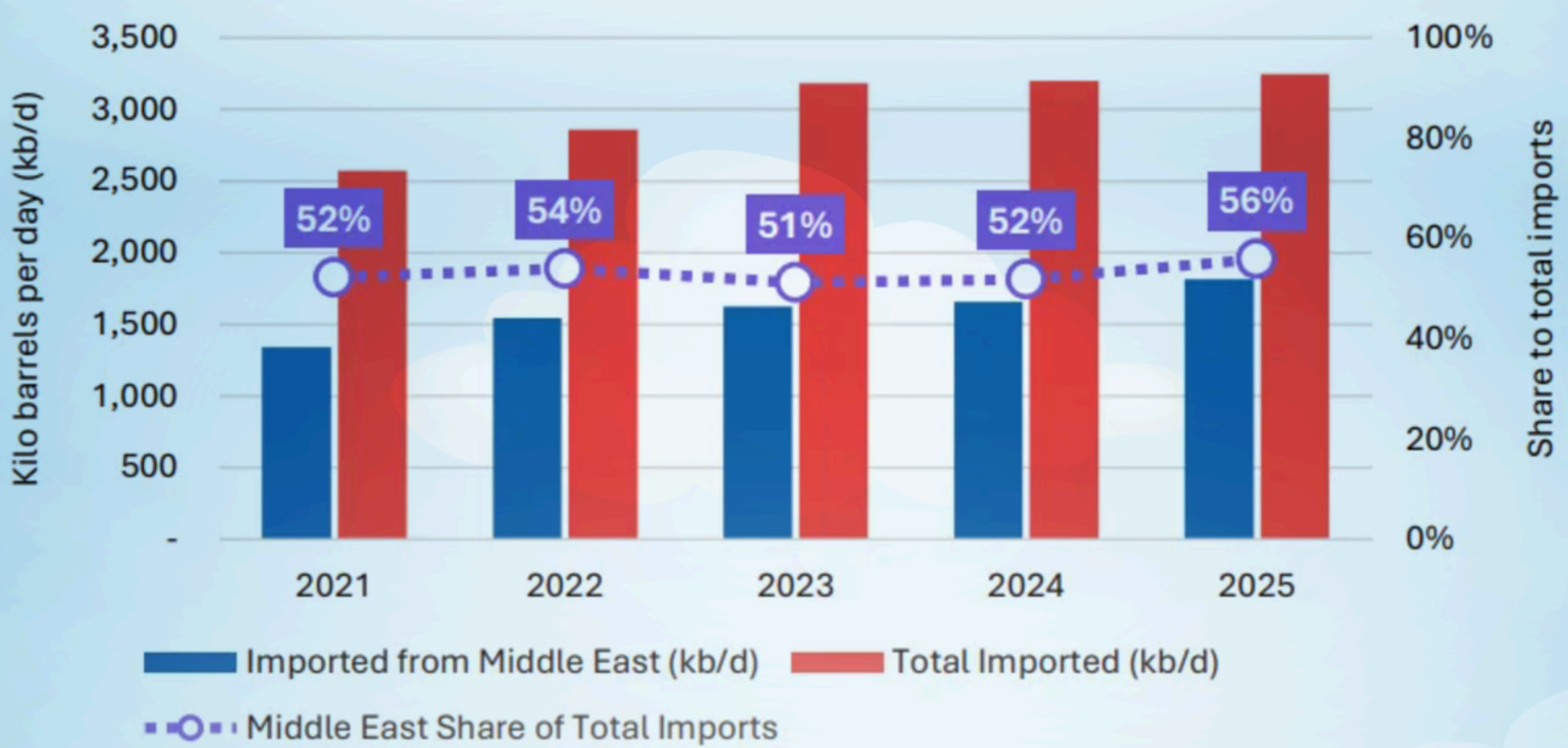
**Figure 1: ASEAN Energy Demand Projection by Fuel (Million tonnes of oil equivalent)**



**Notes:** BAS is Baseline Scenario, ATS is ASEAN Member States Targets Scenario, RAS is Regional Aspiration Scenario, and Mtoe is Million Tonnes of Oil Equivalent

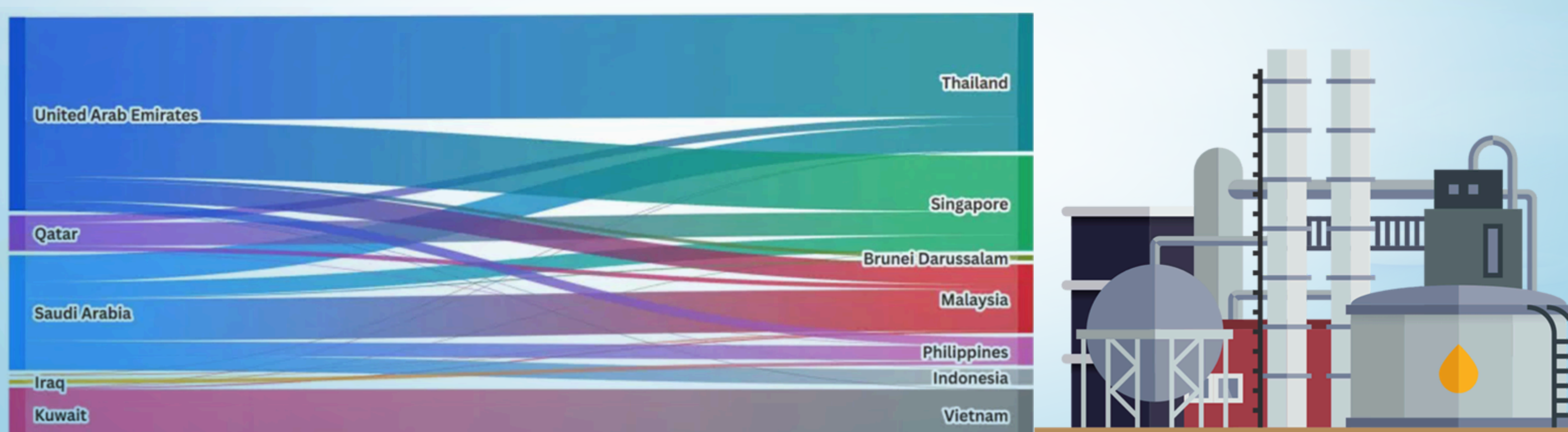
**Source:** Compiled from ASEAN Centre for Energy. (2026). "ASEAN Energy in 2026." [https://storage.googleapis.com/aceweb-bucket-261225/pdf/publication/ASEAN Energy in 2026\\_Report\\_W8Bo740Dzbt85UIX4iC6f6KUiH00KwfsBXLFXL.pdf](https://storage.googleapis.com/aceweb-bucket-261225/pdf/publication/ASEAN%20Energy%20in%202026_Report_W8Bo740Dzbt85UIX4iC6f6KUiH00KwfsBXLFXL.pdf), p. 6, accessed 9 April 2026.

**Figure 2: ASEAN Imported Crude Oil from the Middle East 2021-2025**



**Source:** Compiled from ASEAN Centre for Energy. (2026). "ACE Media Briefing on the situation in the Middle East and the Impact on ASEAN Energy Security." ACE Website, <https://aseanenergy.org/articles/asean-centre-for-energy-ace-on-the-situation-in-the-middle-east-and-the-impact-on-asean-energy-security>, accessed 9 April 2026.

**Figure 3: Crude Oil Movement from the Middle East to ASEAN in 2024**



**Source:** Compiled from ASEAN Centre for Energy. (2026). "ACE Media Briefing on the situation in the Middle East and the Impact on ASEAN Energy Security." ACE Website, <https://aseanenergy.org/articles/asean-centre-for-energy-ace-on-the-situation-in-the-middle-east-and-the-impact-on-asean-energy-security>, accessed 9 April 2026.