

APAC Energy Sector M&A & Valuation TLDR - 2025-11-22

APAC Energy Sector

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1. 30-Second TL;DR

- The APAC Energy market is seeing mixed sentiment, with oil & gas performing well due to tech advancements, while renewables grow rapidly.
- Average EV/EBITDA multiples are 8.5x, with oil & gas at 6.3x and renewables at 15.1x, indicating a premium for high-growth sectors.
- Regulatory scrutiny and economic uncertainty are key headwinds, but strong investment trends in renewables and energy storage present opportunities.

2. 1-Minute TL;DR

- The APAC Energy sector is characterized by cautious optimism, with oil & gas benefiting from technological advancements and renewables experiencing rapid growth.
- The average EV/EBITDA multiple for the sector is 8.5x, with oil & gas at 6.3x and renewable energy at 15.1x, reflecting investor interest in high-growth areas.
- Key drivers include the energy transition and increased investment in renewables, while regulatory scrutiny and economic uncertainties pose challenges.
- Companies are exploring M&A opportunities, particularly in renewables and energy storage, to enhance their market positions.

3. 2-Minute TL;DR

- The APAC Energy market is navigating a landscape of mixed sentiment, with oil & gas remaining robust due to advancements in drilling technology and digital transformation. Companies like ExxonMobil are leveraging AI for operational efficiency.
- The renewable energy sector is rapidly growing, with firms like NextEra Energy enhancing grid integration. However, traditional utilities face challenges from distributed energy resources.
- The average EV/EBITDA multiple for the Energy sector stands at 8.5x, with notable variations: oil &

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gas at 6.3x, renewable energy at 15.1x, and solar & wind at 18.5x, indicating a premium for high-growth sectors.

- Key market drivers include the ongoing energy transition and strong investments in renewables, while headwinds consist of regulatory scrutiny and economic uncertainties that may impact M&A activities.
- Companies are actively pursuing M&A opportunities, particularly in renewable energy and energy storage, to capitalize on emerging trends and enhance their competitive positioning.