

APAC Energy Sector M&A & Valuation TLDR - 2025-11-25

APAC Energy Sector

Generated on 2025-11-25

CONFIDENTIAL - FOR INTERNAL USE ONLY

1. 30-Second TL;DR

- The Energy sector is facing volatility, with oil & gas under pressure due to fluctuating prices, while renewable energy thrives with strong investments.
- Average EV/EBITDA multiples are 8.5x, with renewable energy at 15.1x and oil & gas at 6.3x, indicating a premium for growth sectors.
- Key drivers include the energy transition and increased investment, while headwinds involve regulatory scrutiny and economic uncertainty.

2. 1-Minute TL;DR

- The Energy sector is currently navigating volatility, with oil & gas challenged by fluctuating prices and regulatory scrutiny, while renewable energy sees robust growth driven by investments.
- The average EV/EBITDA multiple for the sector is 8.5x, with notable variations: renewable energy at 15.1x and oil & gas at 6.3x, reflecting a premium for growth sectors.
- Key market drivers include the energy transition towards renewables and increased investment, while headwinds consist of regulatory challenges and economic uncertainties that could impact future performance.
- Investors are advised to focus on high-growth areas like renewable energy and energy storage while monitoring regulatory developments.

3. 2-Minute TL;DR

- The Energy sector is experiencing a complex landscape marked by volatility, with the oil & gas subsector under pressure from fluctuating crude prices, currently at \$59.72 per barrel, and increased regulatory scrutiny. In contrast, the renewable energy subsector is thriving, led by companies like NextEra Energy, which are investing heavily in clean technologies and energy storage solutions.
- The average EV/EBITDA multiple for the Energy sector stands at 8.5x, with significant variations across subsectors: oil & gas at 6.3x, renewable energy at 15.1x, utilities at 12.8x, and solar & wind at

APAC Energy Sector M&A & Valuation TLDR - 2025-11-25

APAC Energy Sector

18.5x, indicating a premium for high-growth sectors.

- Key drivers include the accelerating energy transition towards renewables and increased venture capital investment, while headwinds involve regulatory scrutiny affecting oil & gas and economic uncertainties that could impact energy demand.
- Analysts remain optimistic about the long-term prospects of the Energy sector, emphasizing the importance of the energy transition. Investors are encouraged to focus on high-growth areas, monitor regulatory changes, and leverage technology partnerships to enhance market positioning.