

APAC Energy Sector M&A & Valuation TLDR - 2025-11-14

APAC Energy Sector

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1. 30-Second TL;DR

- The APAC Energy market shows mixed sentiment, with oil and gas thriving due to tech advancements, while renewables grow rapidly.
- Average EV/EBITDA multiples are 8.5x, with oil and gas at 6.3x and renewables at 15.1x, indicating a premium for high-growth sectors.
- Regulatory scrutiny and economic uncertainties pose challenges, but strong investment in renewables and energy storage drives optimism.

2. 1-Minute TL;DR

- The APAC Energy sector is characterized by cautious optimism, with oil and gas benefiting from technological advancements and renewables experiencing rapid growth.
- Average EV/EBITDA multiples stand at 8.5x, with oil and gas at 6.3x and renewable energy at 15.1x, reflecting a premium for growth sectors.
- Key drivers include the energy transition and increased investment in renewables, while headwinds consist of regulatory scrutiny and economic uncertainties.
- Companies are exploring M&A opportunities, particularly in renewable energy and energy storage, to enhance capabilities and market positioning.

3. 2-Minute TL;DR

- The APAC Energy market is navigating a landscape of mixed sentiment, with oil and gas sectors performing well due to advancements in drilling technology and digital transformation. Companies like ExxonMobil are leveraging AI for operational efficiency.
- Renewable energy 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 is 8.5x, with notable variations: oil and gas at

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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 investment in renewables, while regulatory scrutiny and economic uncertainties pose risks to M&A activities.
- Companies are increasingly pursuing M&A opportunities in renewables and energy storage to bolster their market positions, reflecting a strategic shift towards sustainability and innovation in the energy landscape.