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ASIAN DEVELOPMENT BANK BUSINESS OPPORTUNITIES FAIR 2026

21-24 SEPTEMBER 2026 | ADB HEADQUARTERS, MANILA

VALUE FOR MONEY: DRIVING QUALITY INFRASTRUCTURE

Empowering People Energizing Futures

Lei Zhang
Unit Head, Project Administration
SD1-Energy Sector Office

Energy is about people, not just megawatts

By 2023

1 billion

people in ADB developing member countries without access to *clean cooking*

419 million urban poor at high risk from lack of access to *cooling*

350 million people without an *adequate supply of electricity*

150 million people with *no access to electricity* at all

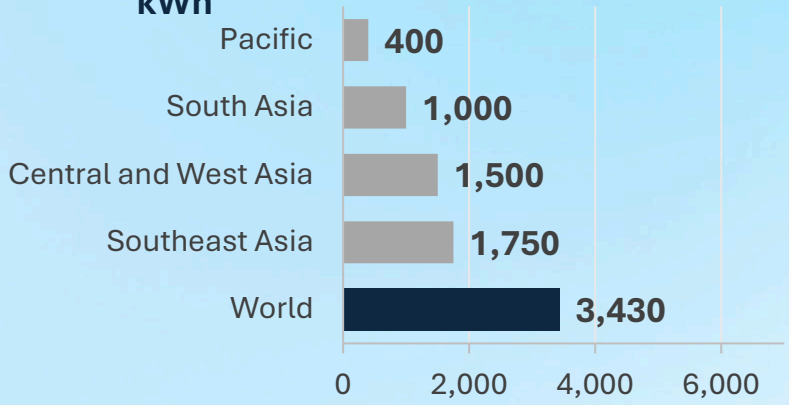
52% Global *GHG emissions* from this region

All figures are regional, covering ADB developing member countries.

2000-2023 192% increase of electricity consumption per capita

158% increase of energy-related CO2 emissions

Electricity use per person in 2025, kWh



Powering Asia's Economic Growth Requires Unprecedented Investment

$1 trillion a year

ADB's estimated annual power infrastructure need in developing Asia, 2016–2030.
Equivalent to $14.7 trillion over the period.

Power need: ADB, Meeting Asia's Infrastructure Needs (developing Asia, 2016–2030). Demand growth and shares: IEA Electricity 2026; UNDP, June 2026. Per-person use: ADB, June 2026.

Rapid demand growth is putting pressure on the whole power system, especially the grids needed to connect, move and manage new supply.

Public budget cannot carry this alone

The volumes are beyond sovereign balance sheets. Public and private capital play different roles.

SOVEREIGN AND MDB CAPITAL
Where public investment enables the market

- Power grid networks
- RE generation that private sector unable to finance
- Sector reform and governance

Capital-intensive, a natural monopoly, long payback and bound up with rights of way. It stays largely sovereign.

PRIVATE AND COMMERCIAL CAPITAL
Where commercial investment can scale

- RE Generation
- Independent energy storage system
- Efficiency and demand-side investment

Once rules and offtake are credible, private and local capital can carry it. ADB financed the first five solar projects in Thailand; commercial banks financed the rest.

Predictable policy and regulation, credible offtake and de-risking are what move capital from the left column to the right.

Allocation between public and private capital: ADB; World Bank energy transition financing; IEA.

ADB finances what private capital cannot yet price — and makes the rest investable.

ADB Energy Policy: Why, What and How

WHY

PRINCIPLE 1

Securing energy for a prosperous and inclusive Asia and the Pacific

Affordable, reliable and modern energy for all — reducing poverty and inequality

WHAT

PRINCIPLE 2

A sustainable and resilient energy future

Climate action, environmental sustainability, and climate and disaster resilience

HOW

P3

Institutions, private sector participation and good governance

P4

Regional cooperation and integration

P5

Integrated cross-sector operations

ADB Energy Policy 2021, amended November 2025

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What ADB finances across the energy system

PRODUCTION

How power is made

- Clean and low-carbon generation
- Production efficiency
- Generation dispatch reform



TRANSMISSION

How power moves

- Transmission and distribution networks*
- Smart and digital power systems
- Flexible infrastructure for cleaner fuels
- Regional interconnection and power trade

UTILIZATION

How power is used

- Energy access and electrification
- Heat pumps, solar heating, clean cooling
- Energy efficiency and RE in buildings, industry and transport



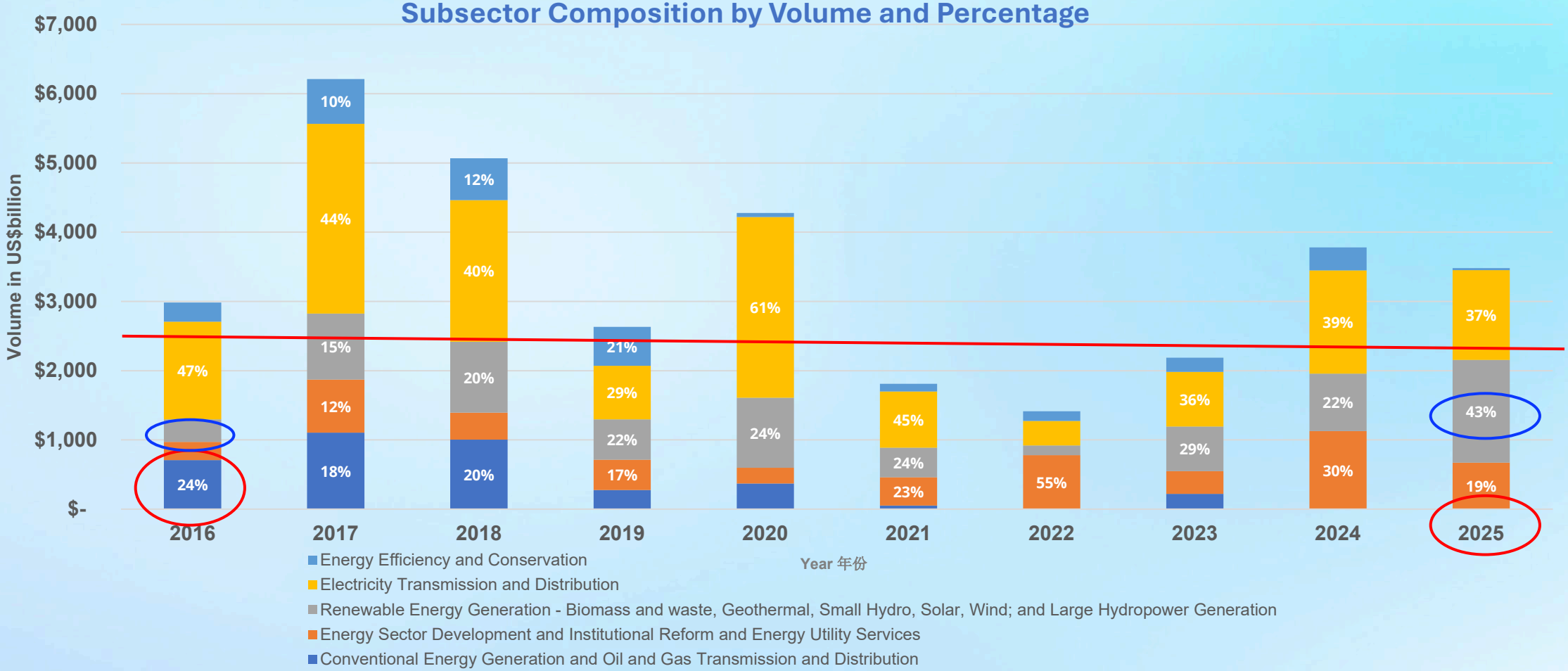
THE FORWARD

- Offshore wind
- Digitalization
- Green hydrogen and green fuels
- Nuclear readiness
- Hard-to-abate sectors
- Critical minerals and clean tech manufacturing

* 42% Share of ADB Energy Sector committed financing for electricity transmission and distribution, 2016–2025. SPD Operations Data; sovereign and nonsovereign committed financing.

Energy Sector Portfolio (Sovereign + Non Sovereign) 2016-2025

Subsector Composition by Volume and Percentage



Energy pipeline 2026-2027

$11.0 billion

$3.4 billion T&D; $5.2 billion RE

indicative financing

149

projects and TAs

37

developing member countries



Indicative financing by region

South Asia	$4.4b
Southeast Asia	$0.6b
Central & West Asia	$5.5b
Pacific	$0.2b
East Asia	$0.3b



Preview the live pipeline

Explore by country, sector, modality and year

Indicative pipeline only. Projects are not confirmed and are subject to change, particularly beyond 2027. Policy-based loans are excluded. Figures compiled from the consolidated pipeline of 20 August 2026 and to be confirmed by the sector office.

How to work with ADB Energy

CONSULTING SERVICES

Firms and individual consultants across feasibility, design, supervision, safeguards, and sector and regulatory advisory.

GOODS AND EQUIPMENT

Transmission and distribution equipment, substations, storage systems, metering, generation equipment and digital systems.

CIVIL WORKS

Construction and installation across networks, generation and distribution modernization programs.

MEET US AT THE FAIR

Energy booth	Main Lobby, until 24 Sep (Thursday)
Sector deep dive	Powering People, Energizing Futures, 22 September
Early market engagement	Energy sessions, 21 and 24 September
One-on-one meetings	By appointment, subject to availability

