









Empowering People, Energizing Futures

Working with ADB's Energy Sector

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ADB

Energy is about people, not just megawatts

1 billion

people in ADB developing member countries without access to clean cooking

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

350 million people without an adequate supply of electricity

53 million people with no access to electricity at all

All figures are regional, covering ADB developing member countries.
* Asia and the Middle East, 2023.



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.

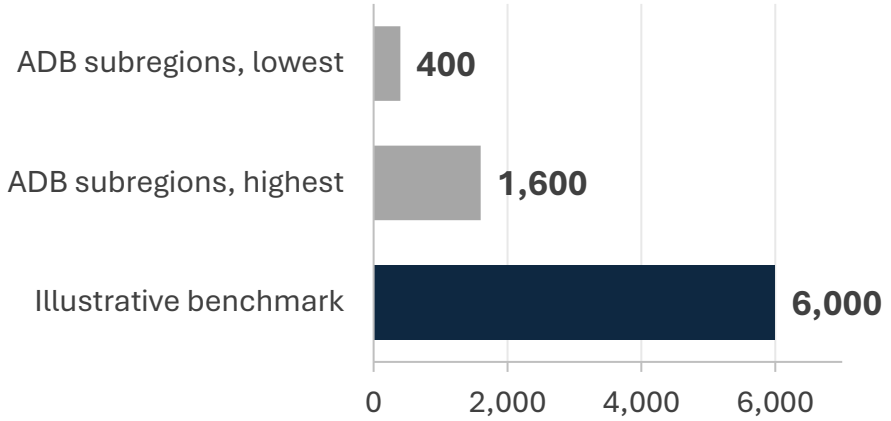
+790 TWh

of additional electricity consumption across Asia and the Pacific in a single year.

$1.8 trillion

illustrative investment for 900+ GW of renewable generation across eight Southeast Asian countries at a 6 MWh/person benchmark. Generation only; grids additional.

Electricity use per person, kWh



85% of global power-demand growth in 2026 is expected to come from Asia and the Pacific

Use per person is up 192% since 2000, and demand is rising 50% faster than last decade.
The $1 trillion a year is the base need, not the cost of catching up.

Power need: ADB, Meeting Asia's Infrastructure Needs (developing Asia, 2016–2030). Demand growth and shares: IEA Electricity 2026; UNDP, June 2026. $1.8t benchmark: illustrative Stanford analysis (Wirjawan, 2024), not an ADB estimate or target. 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.

ADB

Public budgets 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

- Transmission lines and substations
- Market-integration systems and grid software
- 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

- Generation
- Battery and grid-scale storage
- 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 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. Thailand example: ADB.

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

The Policy Frame and the Virtuous Cycle

The Policy sets the direction. The cycle is how ADB delivers on it.

THE POLICY FRAME

Energy Policy 2021, amended November 2025.

P1 **Securing energy** for a prosperous and inclusive Asia and the Pacific

P2 **A sustainable and resilient** energy future

P3 **Institutions, private sector participation** and good governance

P4 **Regional cooperation** and integration

P5 **Integrated cross-sector operations**

2025 amendment adds: critical minerals and manufacturing value chains, methane and flaring reduction, carbon capture and storage, and nuclear power, subject to country readiness and safeguards.

THE VIRTUOUS CYCLE

Tags show which Policy principles each stage draws on.

THE OBJECTIVE — P1

ENERGY ACCESS AND SECURITY

Reliable, affordable and adequate power for people, services, livelihoods and growth.

P5 CUTS ACROSS THE CYCLE — INTEGRATED CROSS-SECTOR OPERATIONS

SECTOR REFORM — P3

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CAPACITY — P3 + P5

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INVESTMENT AT SCALE — P2 + P4 + P5

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Investment earns ADB a place at the table for the next round

Reform makes investment possible. Investment earns a place at the table. Each round helps make the next one bankable — and as markets take over, ADB moves upstream to the next constraint.

What ADB finances across the energy system

GENERATION

How power is made

- Clean and low-carbon generation
- Production efficiency
- Alternative fuels: hydrogen, biofuels
- Generation dispatch reform
- Nuclear power where countries choose it

TRANSMISSION AND DISTRIBUTION

How power moves

- Transmission and distribution networks
- Substations and grid-scale storage
- Smart and digital power systems
- Cybersecurity and digital resilience
- Flexible infrastructure for cleaner fuels
- Regional interconnection and power trade

42%* of ADB energy financing

UTILIZATION

How power is used

- Energy access and electrification
- Efficiency, metering, building-to-grid
- Cleaner energy for industry and transport
- Heat pumps and solar heating
- Cross-sector decarbonization

THE FORWARD EDGE

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

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

Energy pipeline 2026 to 2029

$18.5 billion
indicative financing

202
projects and TAs

37
developing member countries



Indicative financing by region

South Asia	$6.8b
Southeast Asia	$3.5b
Central & West Asia	$7.3b
Pacific	$0.6b
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 project and TA pipeline, 31 August 2026.

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.





THANK YOU

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