# Malaysia's Petrochemical Industry

# A Perfect Time to Benefit from Malaysia's Petrochemical Infrastructure

Through the harnessing of its oil and gas reserves and the forging of smart partnerships with some of the world's largest petroleum companies, Malaysia has established the ideal infrastructure to support a vibrant petrochemical industry.

Over the years, a significant number of domestic and foreign companies have established their presence in Malaysia and continued upgrading or expanding their plant capacity. To name a few of these influential companies include Hengyuan (formerly known as Shell Refining), Petron, BASF, Lotte Chemical Titan, Idemitsu, Toray Group, Penfibre, Kaneka, Eastman Chemicals, Eternal, Polyplastic, UPC Group, Recron, Synthomer, Dairen, Mitsui and Reliance Group.



The ASEAN Bintulu Fertiliser plant in Bintulu, Sarawak

The existence of these MNCs created spin off investment which potential investors could leverage on through the availability of the feedstock in the country. This favourable environment demonstrates Malaysia's potential as a strategic investment location for petrochemical industries. Potential investors could also benefit from the facilities that are already in place. Integrated petrochemical complexes offer centralised utilities, efficient storage services, and a comprehensive transportation network that help reduce capital and operation costs.

In addition, Malaysia also provides a wide range of tax incentives to meet the varying needs of investor.

From 2000 to 2019, the US is the largest source of foreign investments in Malaysia's petroleum products and petrochemicals sector, followed by Japan, Germany, the Netherlands and the Republic of Korea.

# Rich In Oil & Gas Reserves and Petrochemical Feedstocks

# Malaysia ...

- has the world's 28th largest reserves of crude oil and condensates (3.6 billion barrels)
- has the world's 24th largest natural gas reserve (42 trillion cubic feet)
- has one of the world's largest production facility at a single location of liquefied natural gas with production capacity of 29.3 MTPA.
- new refinery facility in Pengerang with the capacity of 300,000 barrels of crude oil per day which produces a range of refined petroleum products, including gasoline and diesel that comply with Euro 5 fuel specifications.

## Location of Oil Refineries in Malaysia

No.	Company	Location
1.	Hengyuan Refining Company Berhad [formerly known as Shell Refining Company (Federation of Malaya) Berhad]	Port Dickson, Negeri Sembilan
2.	Petronas Penapisan (Terengganu) Sdn Bhd	Kertih, Terengganu
3.	Malaysian Refining Company Sdn Bhd	Tangga Batu, Melaka & Sg. Udang, Melaka
4.	Petron Malaysia Refining & Marketing Bhd	Port Dickson, Negeri Sembilan
5.	Kemaman Bitumen Company Sdn Bhd	Telok Kalong, Terengganu
6.	Pengerang Refining Company Sdn Bhd	Pengerang, Johor





## Location of Gas Processing Plant (GPP) in Malaysia

The six gas processing plants located in Kertih, Terengganu – with a combined capacity of 2,060 million standard cubic feet per day (mmscfd) – ensure an adequate supply of petrochemical feedstocks such as methane (sales gas), ethane, propane, butane and condensates to meet demands.

Gas Processing Complex	GPP	Capacity (mmscfd)
Gas Processing Kertih, Terengganu	1	310
	2	250
	3	250
Gas Processing Santong, Terengganu	4	250
	5	500
	6	500
	Total	2,060

To complement the existing gas reserve and ensure future security of gas supply, Malaysia has forged partnerships with other ASEAN countries such as Thailand (Malaysia-Thailand Joint Development Area), Vietnam and Indonesia for the supply of gas. In addition, gas supply is further enhanced with the ongoing implementation of the ASEAN gas grid, a venture to make gas available to all the 10 ASEAN countries.

Meanwhile, Malaysia's Peninsular Gas Utilisation (PGU) trans-peninsular gas transmission pipeline channels sales gas to industries around the country.

No.	Main PGU Pipeline	Length (km)
1.	PGU I : Kertih – Teluk Kalong	32
2.	PGU II Sector I: Telok Kalong – Segamat Sector II: Segamat – Kapar Sector III: Segamat – Plentong	265 241 208
3.	PGU III Sector I: Meru – Lumut Sector II: Lumut – Gurun Sector III: Gurun – Pauh Loop 1: Kertih – Segamat Loop 2: Segamat - Meru	184 130 136 266 228
	Total	1,690



## Location of Regasification Terminal in Malaysia

No.	<b>Regasification Terminal</b>	Company	Start Operation (Year)	Capacity (mmscfd)
1.	LNG Regasification Terminal Sungai Udang (RGTSU), Melaka	Regas Terminal (Sg Udang) Sdn. Bhd.	2013	530
2.	LNG Regasification Terminal Pengerang (RGTP), Johor	Pengerang LNG (Two) Sdn. Bhd.	2017	490
			Total	1,020

## Location of Liquefied Natural Gas (LNG) Facility in Malaysia

No.	LNG Plant	Capacity (mtpa)	
1.	Malaysia LNG Sdn Bhd (MLNG Satu)	Train 1:	1
		Train 2:	8.4 million
		Train 3:	
	Malaysian LNG Dua Sdn Bhd (MLNG Dua)	Train 4:	2
2.		Train 5:	9.6 million
		Train 6:	
3.	Malaysia LNG Tiga Sdn Bhd (MLNG Tiga)	Train 7	<b>}</b> 7.7 million
3.		Train 8	
4.	PETRONAS LNG 9 Sdn Bhd (PL9SB)	Train 9	3.6 million
	Sub-Total	29.3 million	
5.	PETRONAS Floating LNG Satu (PFLNG Satu)	1.2 million	
6.	PETRONAS Floating LNG Satu (PFLNG Dua)	1.5 million	
	Total	32.0	) million



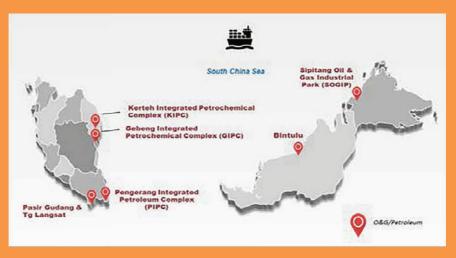


## **Petrochemical Products in Malaysia**

Petrochemical Products	Company/Refinery
• Naphtha	<ul> <li>Petronas Penapisan (Terengganu) Sdn. Bhd.</li> <li>Malaysian Refining Company Sdn. Bhd.</li> <li>Hengyuan Refining Company Berhad</li> <li>Petron Malaysia Refining &amp; Marketing Bhd.</li> <li>Kemaman Bitumen Company Sdn. Bhd.</li> <li>Pengerang Refining Company Sdn Bhd</li> </ul>
• Ethane • Propane • Butane • Condensate	• Petronas Gas Berhad
• Ethylene	<ul> <li>Lotte Chemical Titan (M) Sdn. Bhd.</li> <li>Petronas Chemicals Ethylene Sdn. Bhd.</li> <li>Petronas Chemicals Olefins Sdn. Bhd.</li> <li>Pengerang Refining Company Sdn. Bhd.</li> </ul>
• Propylene	<ul> <li>Propylene</li> <li>Lotte Chemical Titan (M)Sdn. Bhd.</li> <li>Petronas Chemicals MTBE Sdn. Bhd.</li> <li>Petronas Chemicals Olefins Sdn. Bhd.</li> <li>Pengerang Refining Company Sdn. Bhd.</li> </ul>
• Butadiene	<ul> <li>Pengerang Refining Company Sdn. Bhd.</li> <li>Lotte Chemical Titan (M) Sdn. Bhd.</li> </ul>
• Methyl Tertiary Butyl Ether (MTBE)	<ul> <li>Pengerang Refining Company Sdn Bhd</li> <li>Petronas Chemicals MTBE Sdn. Bhd.</li> </ul>
• Methanol	<ul> <li>Pengerang Refining Company Sdn Bhd</li> <li>Petronas Chemicals Methanol Sdn Bhd</li> <li>BASF PETRONAS Chemicals Sdn Bhd</li> </ul>
• Polypropylene (PP) • Linear Low Density Polyethylene (LLDPE) • High Density Polyethylene (HDPE)	<ul> <li>Pengerang Petrochemical Company Sdn Bhd (to be fully operational by Q4 2019).</li> <li>Lotte Chemical Titan (M) Sdn. Bhd.</li> </ul>
• Mono Ethylene Glycol (MEG) • Di Ethylene Glycol (DEG) • Tri Ethylene Glycol (TEG) • Heavy Glycol (HG).	Pengerang Petrochemical Company Sdn Bhd
Ethylene Oxide Ethylene Glycol	Petronas Chemicals Glycols Sdn Bhd
Ethanolamines Alkoxylates / Functional Fluids Butanol Butyl Acrylate Glycols Ethers Butyl Acetate	• Petronas Chemicals Derivatives Sdn Bhd
Benzene Toulene Xylene Raffinate 2	<ul> <li>Lotte Chemical Titan (M) Sdn. Bhd.</li> <li>Petronas Chemicals Aromatics Sdn. Bhd.</li> <li>Pengerang Refining Company Sdn Bhd</li> </ul>
<ul> <li>Isononanol</li> <li>C8 Hydrocarbons</li> <li>C12 Olefins</li> <li>C16 Olefins</li> <li>Raffinate 3</li> <li>Oxo Oil 9N</li> </ul>	• PETRONAS Chemicals Isononanol Sdn. Bhd. (to be commissioned by Q4 2019).

The availability of feedstock at competitive price has made Malaysia a viable petrochemical hub in the ASEAN region, attracting almost RM33 billion of investments in 2018 from leading petrochemical manufacturers.

# **World-Class Facilities in Petrochemical Zones**



# Kertih, Terengganu

Formerly a quiet fishing village, Kertih has now transformed into a petrochemical hub. It houses the Petronas Petrochemical Integrated Complex (PPIC) that links the entire range of the oil and gas value chain — beginning from upstream exploration and production to the final stage of petrochemical manufacturing. Located within the PPIC is PETRONAS' Integrated Petrochemical Complex (IPC), which mainly consists of ethylene-based petrochemical plants.

### **Facilities & Infrastructure**

- Gas processing plants
- Peninsular Gas Utilisation (PGU) project
- Centralised utility facilities
  - Supply of utilities such as power, industrial gases, water and steam
- Institut Teknologi Petroleum Petronas (INSTEP)
  - Training centre
- **Kertih Port** 
  - Mainly bulk liquid port, handling about 2.5 million tonnes of chemical liquid and gasses
  - Vessel services
  - Tank storage (bulk chemical in 41 storage tanks)
  - **Truck services**
  - Drumming

#### **Petrochemical Products Produced in Kertih:**

- Paraxylene Benzene
- Ammonia
- Acetic Acid Polyethylene
- Ethylene Propylene
  - Ethanolamines
- Ethoxylates
- Glycol Ethers Butyl Acetate
- Butanol Ethylene Oxide
  - Ethylene Glycols

# **GEBENG, PAHANG**

Gebeng is another petrochemical hub for multinational players like BASF, Reliance Group, Kaneka, Eastman Chemicals and Polyplastics. The petrochemical zone provides an integrated environment that meets the specific needs of the petrochemical industry.

## **Facilities & Infrastructure**

- Peninsular Gas Utilisation (PGU) project
- Centralised utility facilities
- Supply of utilities such as power, industrial gases, water and steam
- Kuantan Port
  - Centralised tankage facilities
  - Pipeline and piperack system connecting Gebeng to Kuantan Port
  - Container and bulk liquid port
  - Railway linking Kertih, Gebeng and Kuantan Port
  - Cargo handling
  - Marine services (pilotage & towage)
  - Free zone
  - Environment Technology Park
    - Incorporating a training centre, a waste collection and processing centre as well as raw material management and storage facilities, maintenance and servicing facilities.

**Syngas** 

2-Ethyl Hexyl Acrylate

Gamma-butyrolactone

Purified Terephthalic Acid (PTA)

Methyl Methacrylates Copolymers

Polybutylene Terephthalate (PBT)

2-Ethyhexanol

**Butanediol** 

Propylene

**Butyl Acetate** 

2-Ethylhexanoic acid

East Coast Highway

## Petrochemical Plants in Gebeng Produce:

- Acrylic Acid and Esters
- Butyl Acrylate
- Oxo-alcohols
- Phthalic Anhydride and Plasticizers
- Tetrahydrofurane
- Polyester Copolymers
- Dispersion Polyvinyl Chloride
- Methyl Tertiary Butyl Ether (MTBE)
- Polyacetals
- N-Butane
- DL-Isopulegol
- Highly reactive polyisobutylene
- Isoprenol, Citral, Citronellol, Menthol, Energol-Me & Energol-C
- N-Butyraldehyde





7

# PASIR GUDANG – TANJUNG LANGSAT, JOHOR

Pasir Gudang, located next to Johor Port, is now an established industrial area. To cope with the needs of the growing petrochemical industry, the adjacent TanjungLangsat site has been developed to enhance manufacturing capacity.

Facilities & Infrastructure

- Peninsular Gas Utilisation (PGU) project
- Tank farms for bulk storage of petrochemical liquid
- Johor Port
  - Strategically positioned in the heart of the sprawling 8,000-acre Pasir Gudang Industrial Estate
  - With berths of almost 2.4 km, the port provides liquid bulk, dry bulk, general cargo (breakbulk) and container services
  - Three hazardous liquid bulk terminals to handle LPG, chemicals and
  - Petrochemicals
  - Container terminal
  - Free zone
- Tanjong Pelepas Port
  - A world-class container port
  - Free zone
  - Marine services (pilotage, towage and fresh water supply)
- Tanjung Langsat Port
  - Endowed with a 4.5-kilometre shoreline which is ideal for O&G and marine-related industries.
  - Four zones: Storage terminals, oilfield services & equipment (OFSE), regional marine supply base and offshore fabrication & maritime hub.
  - The liquid cargo jetty, with water depth of 15.0 metres, caters to vessels ranging from 5,000 to 120,000 DWT.
  - The dry cargo jetty can cater vessels up to 40,000 DWT.
  - Oil storage terminal with combined capacity of 923,200 m3 (gasoline, naphtha, petroleum, bitumen as well as edible oils).
  - Regional marine supply base (offices, warehouses and open storage area, oilfield logistics, management system services, maintenance and technical support services for corporate, waste management services and stevedoring.
  - Langsat marine terminal (warehouses, open yard and industrial land).

## Petrochemical Plants in Pasir Gudang-Tanjung Langsat Produce:

- Ethylene
- Propylene
- Benzene, Toluene, Xylene (BTX)
- Polyethylene
- Polypropylene
- High Impact Polystyrene
- Ethylbenzene
- Styrene Monomer
- Expandable Polystyrene
- Ethylene Vinyl Acetate
- Styrene butadiene rubber
- Styrene acrylics & full acrylics





# **Pengerang Integrated Petrochemical Complex (PIPC), Johor**

An on-going development of 20,000-acre Pengerang Integrated Petrochemical Complex (PIPC) in Johor Darul Ta'zim.

Within the PIPC, a land parcel of 6,242 acres in size is housing the Refinery and Petrochemical Integrated Development (RAPID) project by PETRONAS with the following facilities and infrastructure:-

Facilities & Infrastructure

- Peninsular Gas Utilisation (PGU) project
- **Regasification terminal**
- Centralised utility facilities
  - Supply of utilities such as power, industrial gases, water and steam
- Deep water terminal
- Air separation unit
- Raw water supply

### **Petrochemical Products Produced in RAPID:**

This new facility will develop value-added products such as refined petroleum products, polymers, and glycols, which will eventually expand the market segments for petrochemicals products in Malaysia. RAPID has been progressing as scheduled and to be fully operational by Q1 2020.





# **Bintulu, Sarawak**

Home to several gas-based petrochemical plants, Bintulu is also the largest producer of liquefied natural gas (LNG) in Malaysia. There are four existing LNG plants in Bintulu which make up the LNG complex, as one of the world's largest LNG production facilities in a single location.

#### **Facilities & Infrastructure**

- Bintulu Port
- Bintulu Airport
- Samalaju Port

#### **Petrochemical Plants in Bintulu Produce:**

- Ammonia
- Urea
- LNG
- Synthetic Gas Oil
- Synthetic Kerosene
- Synthetic Naphtha
- Synthetic Solvents
- Synthetic Detergent Feedstock
- Synthetic Paraffin Wax / Waxy Raffinate

## Sipitang, Sabah

The Sipitang Oil and Gas Industrial Park (SOGIP) is strategically located within Sabah, Brunei and Labuan region.

The availability of natural gas as feedstock from Sabah's offshore production facilities has enabled SOGIP to be well positioned to spearhead the development of oil & gas industry in Sabah. The Sabah Ammonia Urea, or SAMUR project, undertaken by Petronas Chemicals Fertiliser Sabah Sdn. Bhd., consists of an ammonia plant, urea plant and a granulation plant, as well as utilities and jetty facilities. The project was commissioned in May 2017.



# Incentives for Growth



A corporate tax rate of 24% applies to both local and foreign-owned companies in Malaysia. A wide range of tax incentives is also available to these companies. These incentives are constantly reviewed by the government to ensure that companies in Malaysia maintain their competitive edge.

- 1. Incentives for Manufacturing Companies
  - Pioneer Status: Income tax exemption of 70% or 100% on the statutory income for five years; or
  - Investment Tax Allowance: Investment tax allowance of 60% or 100% on the qualifying capital expenditure for five years. The allowance can be utilised to offset against 70% or 100% of the statutory income.
  - Reinvestment Allowance: Reinvestment allowance of 60% for 15 years on the qualifying capital expenditure. The allowance can be offset against 70% of the statutory income.
  - Accelerated Capital Allowance: An accelerated capital allowance consisting of an initial allowance of 40% and an annual allowance of 20% is available for three years after the reinvestment allowance period.
- 2. Incentives for High Technology Companies
  - Pioneer Status with a tax exemption of 100% on the statutory income for five years; or
  - Investment Tax Allowance of 60% on the qualifying capital expenditure for five years which can be offset against 100% of the statutory income.
- 3. Incentives for Strategic Projects
  - Pioneer Status with a tax exemption of 100% on the statutory income for ten years; or
  - Investment Tax Allowance of 100% on the qualifying capital expenditure for five years which can be offset against 100% of the statutory income.
- 4. Pre-packaged Incentives: Customised packages that cover tax and non-tax incentives.
- 5. Other Incentives
  - Industrial Building Allowance
  - Tariff Related Incentives

# The Way Ahead Challenges and Opportunities

The improving lifestyle of Malaysians has led to a higher demand for petrochemical products, not to mention the availability of hydrocarbon feedstocks from the indigenous O&G supply. In the past few years, the trend of investments in this industry has been towards increasing feedstock availability, expanding capacities, enhancing the value of existing products, and broadening the range of petrochemicals produced in the country.

The pressure for petrochemical industry is on stepping up to a more knowledgebased chemical portfolio in the derivative and specialty markets as demand from consumers are continuously evolving due to better lifestyle. Therefore, there is a need for petrochemical producers to innovate in formulating superior petrochemical derivatives in the upper tier of the chemical value chain. Besides that, petrochemical industry is challenged to play a greater role in balancing economic, environmental and social needs. Sound governance and ethical business practices are prerequisites to gain and maintain the social licence to operate for future relevance.



Malaysia's Multimedia Super Corridor has resulted in a workforce competent in the K-economy.

# **Why Investors Choose Malaysia**

- Strategic location
- Gateway to ASEAN and AFTA
- Economic stability
- Government's commitment
- Rich reserves of natural gas
- Competitive source of raw materials
- World-class facilities
- Integrated infrastructure
- Skilled technical manpower
- Quality of life



Kuala Lumpur's light rail transit provides a convenient mode of commuting.



Malaysia uses the latest digital and fibre optics technology to provide high quality telecommunication services at competitive prices.



Life is an adventure in Malaysia-a land of perpetual summer

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