



PETRONAS

ACCELERATING GROWTH IN GLYCOLS

Presentation to the
Asian Chemical Fiber Industries Federation Conference

Nur Fadhlin Bt. Ali
Head of Marketing, Olefins, Glycols & Derivatives (OGD)
PETRONAS Chemicals Group Berhad

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Nur Fadhlin Ali

2002 – Sinar Berlian Sdn. Bhd.
(Subsidiary of Mitsubishi Corp)

2008 – PETRONAS Chemicals Group Berhad (PCG)

2024 – Olefins, Glycols & Derivatives (OGD)
Head of Marketing, Commodities, PCG

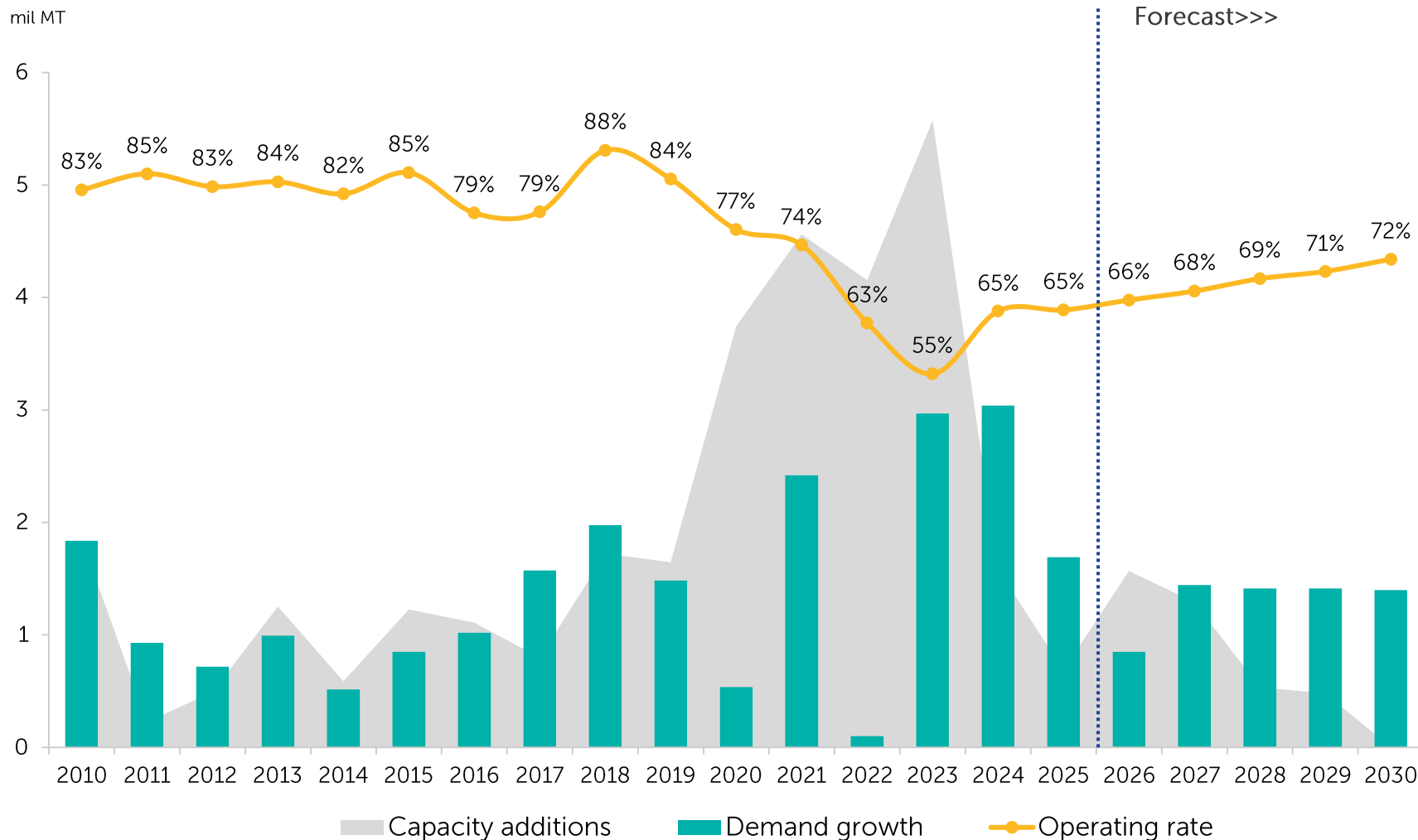
Bachelor's Degree in Chemical Engineering (2001)
Universiti Teknologi Malaysia (UTM)

Chartered Marketer by Chartered Institute of Marketing
United Kingdom (2019)



MEG Faces Oversupply, Rebalance Expected Over Time

Asia Pacific MEG capacity additions vs. demand growth



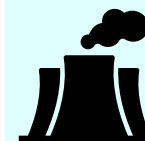
MARKET OUTLOOK



China is expected to account for almost all the **new capacity** in the next five years



North America and the **Middle East** remain as the **largest exporters** of MEG, supplying to Asia.

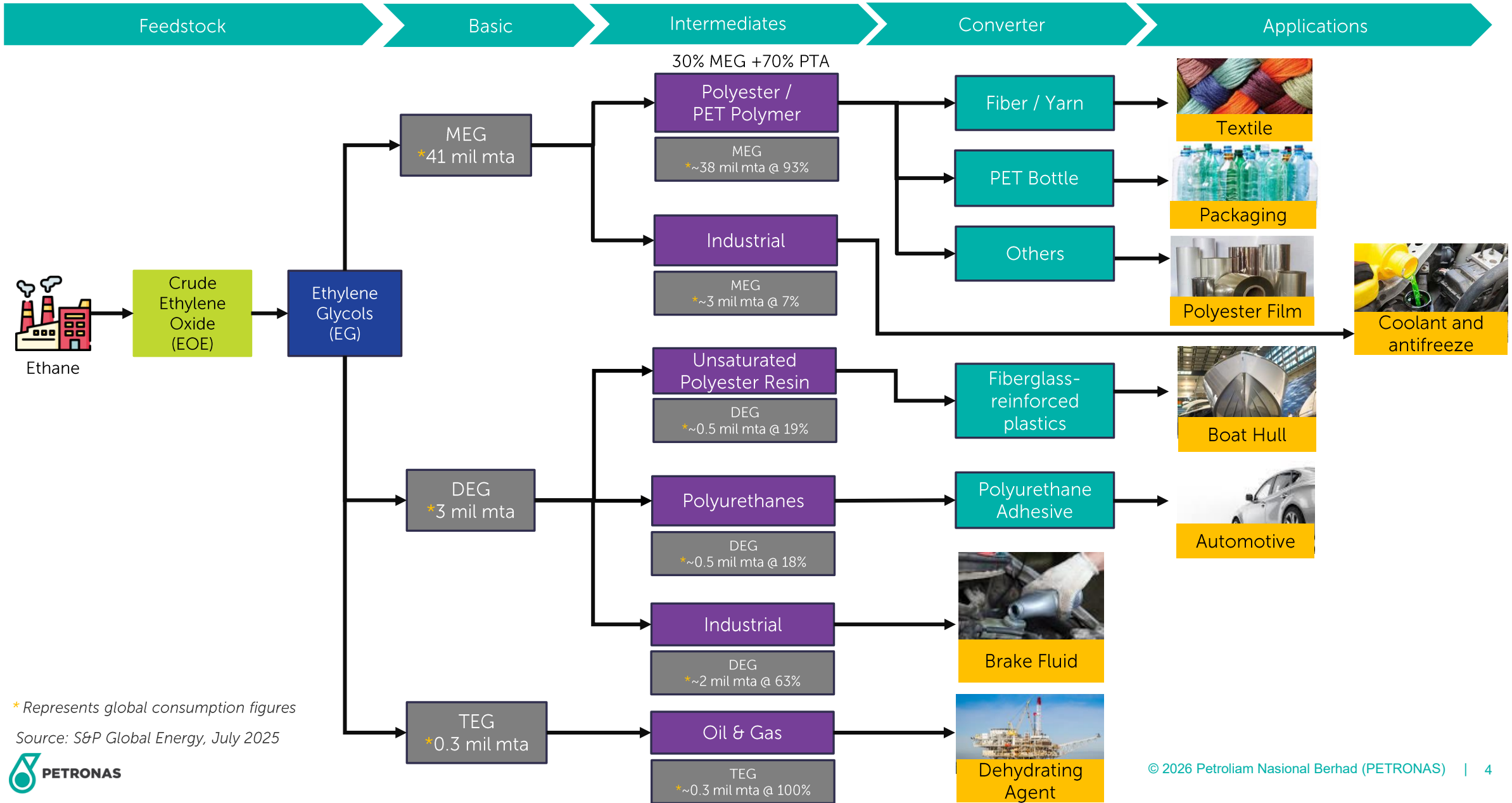


No major rationalisations are anticipated in the near term, **weighing down global operating rate**



Demand growth is limited by **slower economic** expansion in China, **saturation** in developed markets, and **higher PET recycling** penetration

Across the Value Chain, Glycols Enable Diverse Everyday Applications



* Represents global consumption figures

Source: S&P Global Energy, July 2025



PCG Drives Resilient Growth Through Scale, Integration, Regional Strength and Portfolio Diversity

Quick Facts

First plant in
1985

ASEAN Bintulu
Fertilizer Sdn Bhd

Production Capacity

16.8mil
tonnes per annum (mtpa)

Made up of more than

80 Subsidiaries

JVs & associated
companies

Market Capitalisation

RM48.6bil
as at 31 March 2026

Our Market Presence

26%

Malaysia

31%

Southeast
Asia

21%

Northeast
Asia

22%

Rest of the
World

as at 31 Dec 2025

Constituent of FTSE4Good Bursa Malaysia Index for

12 consecutive years

Bursa Malaysia index measures the overall performance of selected stocks on Malaysia's stock market.

Portfolios

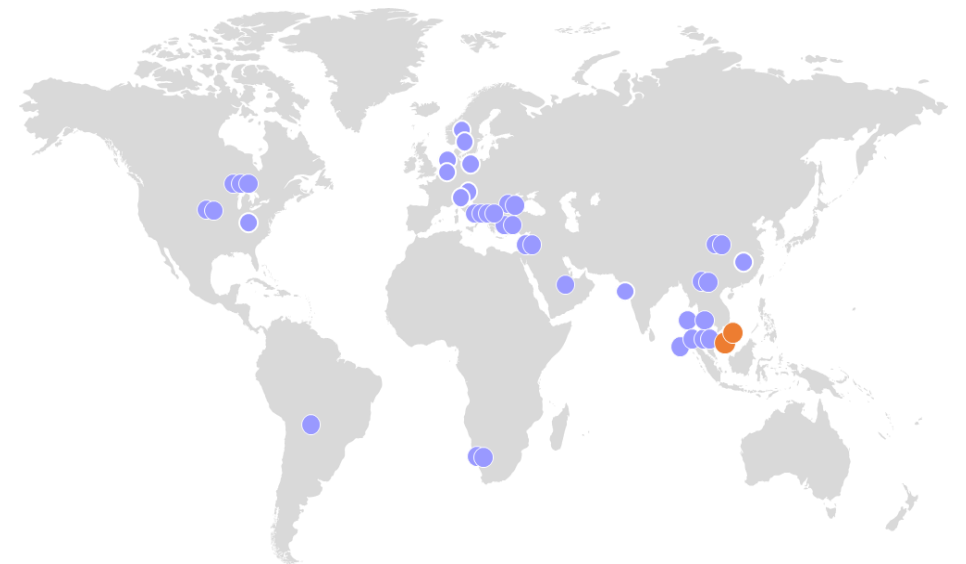
1

Our **Commodities** portfolio covers a wide range of olefins, glycols, polymers, methanol, ammonia and fertilisers, as well as aromatics and MTBE.

2

Speciality Chemicals comprises three business units (Specialties, Intermediates, and Silicones) focused on Coatings, Engineered Fluids, Advanced Polymers, and Personal Care segments, delivering customer-centric solutions backed by global experience and extensive application knowledge.

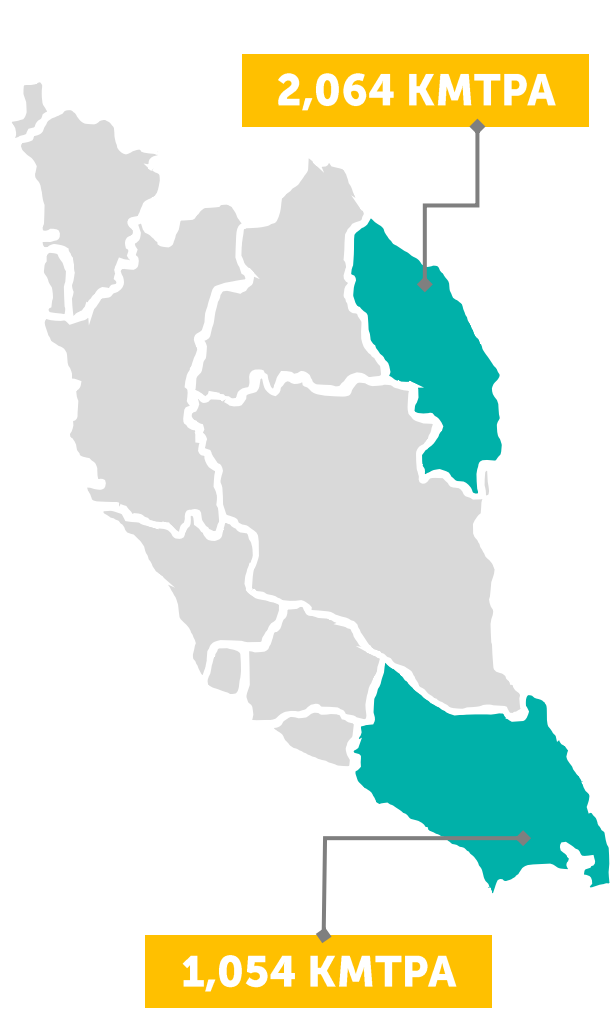
Global Network



● Commodities (FM & OD)
● Specialty Chemicals

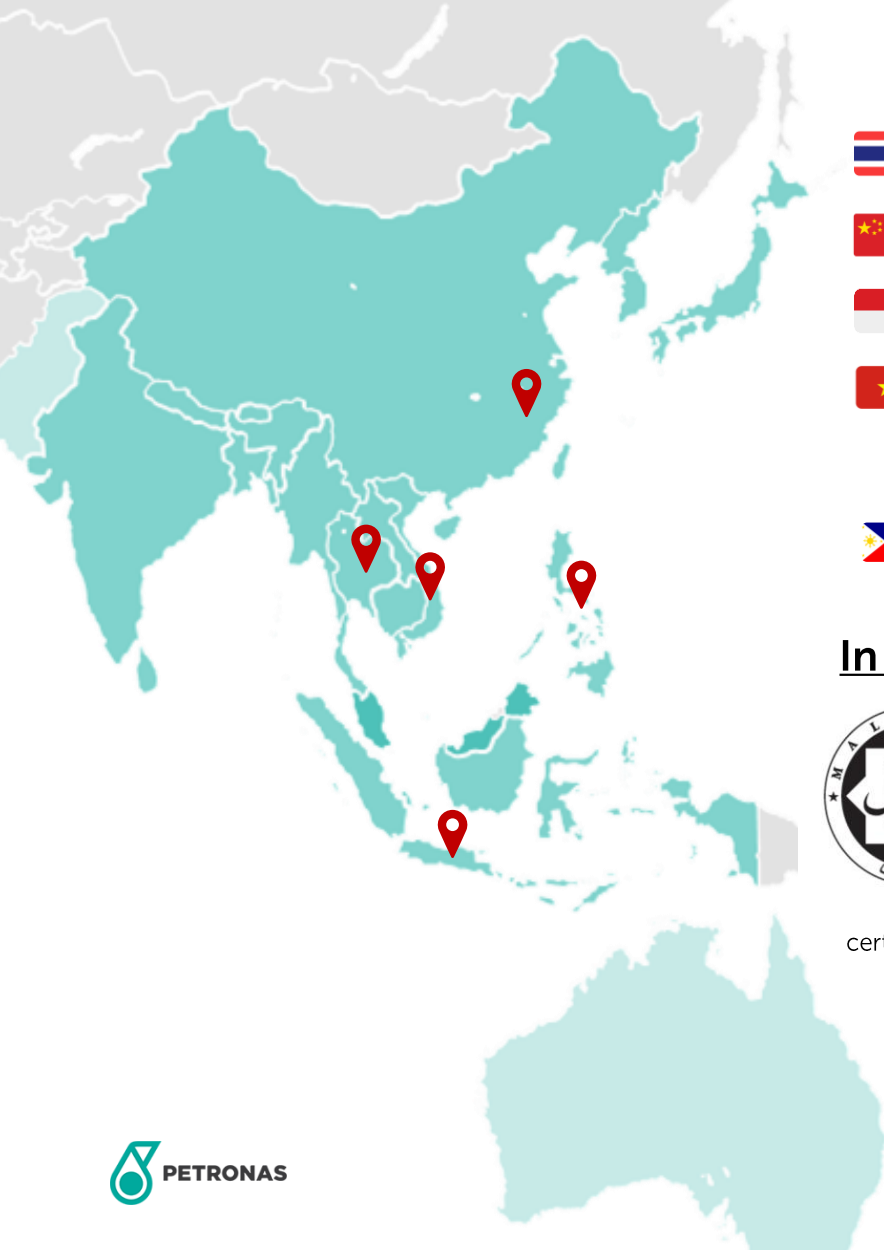
21 manufacturing sites across Malaysia, Canada, China, Germany, India, Italy, Singapore, Sweden, the Netherlands and the USA

Integrated Assets Enable Glycols Scale And Downstream Value Capture



<p>1</p> <p> PC Ethylene Sdn Bhd (PCESB) 400 KMTPA Ethylene</p> <p> Location: Kertih, Terengganu</p> <p> Technology: ABB Lumus</p>	<p>2</p> <p> PC Olefins Sdn Bhd (PCOSB) 600 KMTPA Ethylene 85 KMTPA Propylene</p> <p> Location: Kertih, Terengganu</p> <p> Technology: Linde</p>	<p>3</p> <p> PC Glycols Sdn Bhd (PCGSB) 360 KMTPA Monoethylene Glycol (MEG) 20 KMTPA Diethylene Glycol (DEG) 140KMTPA Ethylene Oxide (EO)</p> <p> Location: Kertih, Terengganu</p> <p> Technology: DOW METEOR (Most Effective Technology of Ethylene Oxide Reaction)</p>
<p>4</p> <p> PC Derivatives Sdn Bhd (PCDSB) 140 KMTPA Butanol (BUT) 50 KMTPA Butyl Acetate (BAC) 60 KMTPA Ethonas Butyl Glycol Ethers (BGE) 75 KMTPA Ethanolamines (EOA) 100KMTPA Alkoxylation Chemical Mixing (AKM)</p> <ul style="list-style-type: none"> Ethonas Nonylphenol Ethoxylates (NPE) Ethonas Fatty Alcohol Ethoxylates (FAE) Ethonas Polyethylene Glycol (PEG) <p> Location: Kertih, Terengganu</p> <p> Technology: DOW</p>	<p>5</p> <p> Pengerang Refining and Petrochemical (PRefChem) 650 KMTPA Ethylene 370 KMTPA Monoethylene Glycol (MEG) 32 KMTPA Diethylene Glycol (DEG) 2 KMTPA Triethylene Glycol (TEG)</p> <p> Location: Pengerang, Johor</p> <p> Technology: Olefins – ABB Lummus Glycols – Shell Master</p>	<p>6</p> <p> PCG PCC Oxyalkylates Sdn Bhd 22 KMTPA Ethoxylates 12 KMTPA Polyol</p> <p> Location: Kertih, Terengganu</p> <p> Technology: PCC SE</p>


PCG's Commodities Footprint Drives Stronger Market Presence, Customer Engagement and Growth



Overseas Subsidiaries

-  1. PCM (Thailand) Company Limited
-  2. PCM (China) Company Limited
-  3. PT PCM Kimia (Indonesia) 
-  4. PCIH (Vietnam) **NEW!**

Representative Office

-  1. PCM (Philippines)

In Compliance with MEG Product Regulations



Halal certification



ISO certifications



EU REACH compliances



SVHC management



CalPro 65 compliances

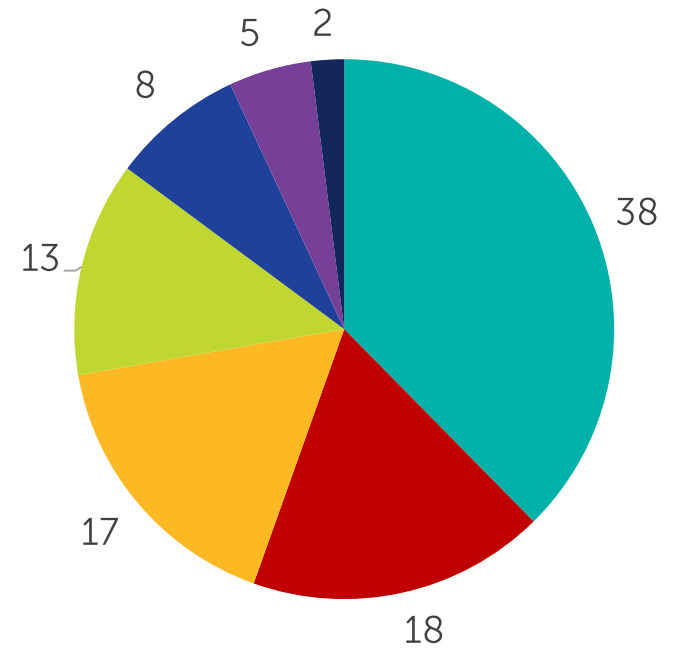









Non-Intentionally Added Substance (NIAS)



Common regulatory compliances

OGD MEG 2025 Sales Volume (%)



-  Malaysia
-  Thailand
-  Indonesia
-  China
-  Vietnam
-  Hong Kong
-  Singapore

Established Supply and Distribution Network Supports MEG Delivery Across Key Markets



CONNECT WITH US

Nur Fadhlin Binti Ali

Email: nurfadhlin_ali@petronas.com.my

Nor Hazlina Binti A Ralim

Email: hazlina.ralim@petronas.com.my

Website



www.petronas.com/pcg



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