

CEBRI

BRAZILIAN CENTER FOR INTERNATIONAL RELATIONS

ASIA PROGRAM

XXXII CHINA ANALYSIS GROUP MEETING

REPORT XXXII, YEAR VI

AUGUST 30, 2023

Online discussion panel via Zoom

BRAZIL-ASEAN RELATIONS AND THE ENERGY TRANSITION



BRAZILIAN CENTER FOR INTERNATIONAL RELATIONS

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The Brazilian Center for International Relations (CEBRI) is an independent, nonprofit think tank that, since 1998, has dedicated itself to promoting policy-oriented discussions on agendas of national interest and Brazil's international engagement competitively and strategically.

Based in Rio de Janeiro, CEBRI is recognized nationally and internationally as a platform to analyze, develop, and coordinate pragmatic and innovative solutions. Founded by renowned national leaders, the Board of Trustees is a fundamental part of CEBRI's nonpartisan, diverse, and pluralistic network, composed of experts in various fields of activities and schools of thought.

More than 100 members believe in and promote our mission to influence policy-oriented and high-level discussions on international relations and public policies. Besides individual members and diplomatic representatives from various countries, CEBRI's Advisory Board includes companies from the economy's leading sectors.

ASIA PROGRAM

The Program promotes a systematic monitoring of matters relevant to international relations and Brazilian development, particularly those related to China. Special attention has been given to monitoring the ongoing economic reforms and political transformations in China, considering their global effects and impacts in Latin America and Brazil. This continuous examination allows CEBRI to provide information and analysis to its members, partners and to the Brazilian government, contributing to the construction of Brazil's strategic position towards China, as well as helping increase knowledge about China within Brazilian society.

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Marcos Caramuru

Caramuru is a Member of the International Advisory Board of the Brazilian Center for International Relations (CEBRI). Marcos Caramuru de Paiva, partner and member of KEMU (Shanghai) Consultancy, is a former Brazilian diplomat with a long experience in finance. Having lived in Asia from 2004 to the end of 2019, he was Ambassador in Beijing (2016-2018), Consul General in Shanghai (2008-2011) and Ambassador in Malaysia and Brunei (2004-2008). In his previous professional trajectory, he was Chairman of the Financial Intelligence Unit in Brazil (2003), Vice-Minister of Finance for International Affairs (1996-2002) and Executive Director at the World Bank in Washington DC (1993-1996). Marcos de Paiva is a Counselor of the Brazilian section of the Brazil-China Business Council. Marcos Caramuru de Paiva kept for a few years in the past a column at the Brazilian newspaper Folha de São Paulo, in which he wrote regularly about China and Asia. Nowadays he contributes occasionally to newspapers and academic publications. He is also a frequent speaker at seminars both in China and Brazil. Marcos Caramuru de Paiva holds a B.A in Administration from the Federal University of Rio de Janeiro. He also holds the undergraduation and the High-Level Course diplomas from the Brazilian Diplomatic Academy (Institute Rio Branco).



SENIOR FELLOW

Larissa Wachholz

Senior Fellow at the Brazilian Center of International Relations (CEBRI). Partner at Vallya and Former Special Advisor to the Minister of Agriculture, Livestock and Supply of Brazil, Tereza Cristina, for matters related to China between 2019 and 2021. She is also a founding partner of the Institute of Government Relations (Irelgov). Larissa has more than ten years of experience with the Asian market. She lived in Beijing between 2008 and 2013, working with business development and institutional affairs. She was a director at the financial advisory firm Vallya between 2013 and 2019, where she was responsible for the strategic advisory of various transactions focused on China, in sectors such as energy, infrastructure and machinery. She holds a Master's in Contemporary China Studies from Renmin University of China and executive education degrees in International Relations and Corporate Finance from the London School of Economics with Peking University.



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BRAZIL-ASEAN RELATIONS AND THE ENERGY TRANSITION

Report by: Beatriz Pfeifer

SUPPORT:



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Guiding Questions

During its XXXII Meeting, CEBRI's China Analysis Group focused on three main themes and questions:

1. What is the current state of Brazil-ASEAN relations, and what are some of the most promising prospects for cooperation in the context of the energy transition?

2. What is the status of ASEAN's energy transition? To what extent can collaboration with Brazil contribute to this area?

3. What are the perspectives for Brazil's energy transition and how does cooperation with ASEAN fit in this context?

XXXII Meeting Report

1. What is the current state of Brazil-ASEAN relations, and what are some of the most promising prospects for cooperation in the context of the energy transition?

The importance of the Association of Southeast Asian Nations (ASEAN) for Brazil is indisputable. Speakers were quick to note the remarkable economic relations between the two: Brazil-ASEAN trade reached 34 billion USD in 2022. In the first half of 2023, Brazilian exports to the bloc reached 12 billion USD, surpassing the figures for the same period in 2022. To further put this into perspective, the panel noted that Brazil exports more to ASEAN than to MERCOSUR, the Middle East or the African continent. Brazil sells more to Malaysia than the United Kingdom, Paraguay or Peru and more to Singapore than Germany, Japan or India. More to Thailand than to France. More than 45% of Brazilian exports head towards the Asia-Pacific region. Brazil's main trade routes pass through Southeast Asia, especially the Strait of Malacca. Therefore, the region is strategically important as it also serves as a passage for trade with other key partners in Asia.

ASEAN's strong economic growth in recent decades also generates opportunities for reciprocal investments. Speakers highlighted that, with an average GDP growth of 5.7% between 2000 and 2019, Asia is attractive for Brazilian companies looking to diversify their international presence. At the same time, companies from Southeast Asia have been investing in Brazil. According to panelists, Singapore is already the third largest Asian direct investor in Brazil, only behind China and Japan, with an estimated stock of 17.4 billion USD in 2020.

Beyond the economic and commercial dimension of the bilateral relation, Brazil and ASEAN share world views on many issues including respect for international law and guiding principles of international relations, such as the peaceful resolution of conflicts, self-determination, non-intervention in domestic affairs, equality among states, and international cooperation. Brazil and ASEAN belong to regions self-declared as zones of peace. Both are bound to treaties that prohibit nuclear weapons in their territories.

Considering these shared interests and worldviews, Brazil has sought to strengthen ties with ASEAN and its members. One crucial step was Brazil's adherence to the Treaty of Amity and Cooperation in Southeast Asia in 2012, a cornerstone for developing a partnership with ASEAN. The treaty has provisions to promote peace, stability and friendly relations among parties. It is worth noting that Brazil was the first country from Latin America to join the treaty and the first Latin American country to become a sectoral dialogue partner of ASEAN.

The panel demonstrated confidence that the partnership will bring relations with ASEAN to a new level, as it opens up the possibility of developing closer cooperation in several fields. In order to fulfill this cooperation and trade potential, the Brazilian government is taking steps to allocate more resources to the partnership: Brazil has appointed a delegation specifically to the Association and a new diplomatic unit was created in the Ministry of Foreign Affairs to handle Brazil-ASEAN relations, with the nomination of an Ambassador as Special Envoy to the Bloc. It is also worth mentioning that Brazil maintains accredited ambassadors to all ASEAN member countries and resident embassies in the Philippines, Indonesia, Malaysia, Myanmar, Singapore, Thailand and Vietnam. Meanwhile, seven ASEAN countries maintain embassies in Brasilia and Cambodia's government is opening a resident embassy in the Brazilian capital. Brazil's relations with ASEAN are rooted in shared principles and concrete interests. The goal is to raise the relation with the Association to an unprecedented level. In order to give substance to the sectoral dialogue partnership, Brazil can offer cooperation in different areas, such as sustainable agriculture; food security; biodiversity; defense; science, technology and innovation; energy; among others.

One of such areas is climate change, which is intrinsically related to the energy sector. According to the International Energy Agency, energy is responsible for three-quarters of global greenhouse gas emissions. Brazil is in a privileged position in this domain, as it has experience in low-carbon solutions that it is willing to share with ASEAN partners. The panel stated that Brazil has by far the cleanest energy mix among G20 countries and one of the cleanest in the world, as renewable energy sources make up 47.4% of the national energy mix. In many G20 countries, this percentage is at most 10%. Renewables also account for over 80% of power generation in Brazil. The country has, overall, one of the world's least carbon-intensive energy sectors. ASEAN countries, in turn, strive to meet their growing energy demand through renewable sources. Brazil can thus provide effective and economically viable solutions to contribute to this end.

If adopted, some of these solutions could reduce emissions in ASEAN countries in the short term at a competitive cost. The first effective solution is ethanol: several ASEAN countries, such as Indonesia, have been open to increasing the percentage of ethanol blended with gasoline, which is a practical initiative in the short and medium term. This

blend can be produced competitively in the ASEAN region in an integrated manner. Not all Asian countries would be able to produce large quantities of bioethanol. However, they all can be part of the ethanol supply chain, which involves technologies, car parts, machinery, genetic engineering and soil management, among other features. Other solutions to decarbonize energy mastered by Brazil include using green steel, iron, bioplastics and low-carbon aluminum, among others. There is also potential for the joint development of technologies to make national electric grids more efficient and share experiences on regulatory issues. The participants argued that the Brazilian government is aware of the importance of transforming converging interests in technical capabilities into effective cooperation -- for example, it is developing a technical cooperation project with the Philippines to help increase the productivity of the sugarcane grown in the Southeast Asian country.

Brazil's energy strategy ranks top in the country's political agenda. Along with decarbonization, it will undoubtedly be present in the G20 discussions, the leading global forum which Brazil will preside over in 2024, creating spaces to further develop global cooperation in this area.



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2. What is the status of ASEAN's energy transition? To what extent can collaboration with Brazil contribute to this area?

Energy plays a critical role within ASEAN, which is composed of growing economies. The seventh Asian Energy Outlook, recently issued by the ASEAN Center for Energy (ACE), underscores the imperative of quadrupling the primary energy supply between 2020 and 2050. Nevertheless, concerted efforts toward energy efficiency and conservation can reduce this demand, first at the national level and further through regional collaboration, to 3 and 2.7 times, respectively. It is essential to recognize that despite these efforts, fossil fuels will continue to be the dominant components of the energy supply mix. This reliance on oil for transportation and coal for power generation and industrial processes presents potential energy security challenges within the region.

Projections also foretell that ASEAN may transition from being a net gas importer by 2025 to a net coal importer by 2039, adding complexity to energy dynamics. In addition to renewable energy sources, embracing technologies such as carbon capture, utilization, and storage, hydrogen, and bioenergy becomes critical. A comprehensive evaluation of these technologies should encompass considerations of resource efficiency, material availability, and end-of-life management. The speakers argued that ASEAN is eager to explore potential collaborations with Brazil, encompassing joint research, knowledge sharing, capacity building, and project activities aimed at implementing innovative solutions. These collaborative endeavors hold the promise of accelerating the energy transition within the region.

One particularly cost-optimized solution to enhance the penetration of Renewable Energy sources, including solar and wind, is the establishment of the ASEAN cross-border interconnection system under the ASEAN power grid. Projections suggest that by 2040, the region has the potential to interconnect up to 35GW of electricity generation. Concurrently, it is imperative to underscore the significance of diverse energy storage mechanisms to manage energy during periods of low demand and provide power storage during peak periods. This is especially vital to facilitate greater adoption of Renewable Energy sources and ensuring grid stability. The exploration of pumped hydro storage assumes critical importance, with the region estimated to require 26.6GW of capacity to store approximately 1100 GWh of electricity by 2050.

Acknowledging that financing plays a pivotal role, potentially acting as a bottleneck and a catalyst for the energy transition, is crucial, according to speakers. Shifting from a fossil

fuel-dependent system to one driven by renewable sources necessitates substantial investments in the power sector. This transition underscores the importance of energy efficiency measures in demand reduction, with investment requirements ranging from \$726 billion to USD 1 trillion from 2021 to 2050. In the least-cost optimization scenario, emphasizing cost-effectiveness, investment needs are approximately USD 144 billion lower than in the original plan. Additionally, investment dynamics are influenced by the electrification rates, with the power sector investment estimated between USD 700 billion and USD 800 billion. Thus, speakers highlight how crucial it is to recognize that there may be consequences associated with increased electricity utilization in industrial and transport sectors, which countries must carefully manage.

From a demand perspective, energy consumption is projected to surge to 1.3 million tons of oil equivalent. However, concerted efforts could reduce energy consumption by 53.7% by 2050 compared to the baseline scenario. Notably, the industrial and transport sectors remain the highest energy consumers within the region, with oil products retaining their dominance as the primary fuel source. In the transport sector, for instance, approximately 91% of energy consumption by the vehicle fleet in 2050 is expected to stem from oil products in the baseline scenario.

In this context, Biofuels emerge as a critical technology in ASEAN's energy transition journey. Five Southeast Asian countries have already implemented blending mandates, and countries like Indonesia, Malaysia, the Philippines, and Thailand are significant biofuel producers, with targets reaching up to B40 and even E85 mandates in place. These biofuels primarily derive from crude palm oil (CPO), coconut oil, sugarcane, and cassava. However, a need to significantly expand biofuel production remains to meet ASEAN countries' targets. Participants also mention that exploring the land use aspect for biofuel production is particularly interesting. In the 2050 Baseline Scenario, biodiesel from palm oil would necessitate around 8.8 million hectares of land, while bioethanol production from sugarcane would require approximately 2.3 million hectares, translating to roughly 2.5% of the total landmass of ASEAN member states. Given that Southeast Asia's land area exceeds 450 million hectares, with over 20 million hectares currently allocated to oil palm plantations, there would be room for expanding land use to approximately 10 to 11 million hectares to cater to the bioenergy needs of the transport and industrial sectors.

These key points were present in the first ASEAN Inter-Regional Energy Forum (IREF) discussions in late August 2023. The IREF, themed "Strengthening Efforts Towards Energy Transition," witnessed the participation of various regions, including Latin America represented by the Latin-American Energy Organization, South Asia by the SAARC Energy Center, and the African Union by the African Energy Commission. The United Nations Economic and Social Commission for Asia and the Pacific (UN

ESCAP) was also a guest. The IREF served as a platform for potential inter-regional cooperation in the energy sector, encompassing knowledge sharing, capacity enhancement, collaborative projects, policy dialogues, energy investment forums, and other cooperative initiatives.

The overarching goal is to secure accessible, affordable, and sustainable energy. The inaugural IREF marked a historic milestone, initiating this journey and acknowledging shared challenges across diverse contexts. All participating partners underscored the significance of interregional collaboration and pledged to pursue further cooperation. The forum shed light on critical facets, including balanced energy transition, joint research, institutional capacity, and the role of critical minerals and rare earths. Notably, the IREF highlighted Brazil as one of the foremost consumers of biofuels globally, with a quarter of transportation fuels derived from biofuels. Brazil's use of flex engines in passenger cars, allowing for 100% bioethanol utilization, are viewed as being able to offer valuable lessons for Southeast Asia. These lessons extend beyond technology to encompass agricultural regulations, policies, and other factors facilitating the successful replacement of gasoline with 100% ethanol. Collaboration between Brazil and ASEAN is poised to enhance the success of the IREF by facilitating knowledge exchange and shared initiatives in the pursuit of a sustainable energy future.

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3. What are the perspectives for Brazil's energy transition and how does cooperation with ASEAN fit in this context?

Brazil, with its vast landmass and a population of 208 million, is the world's thirteenth-largest economy. The country is one of the 20 main crude oil producers globally, with a prominent contribution in the Exploration and Production (E&P) sector. The pre-salt has played a pivotal role in strengthening Brazil's position in the sector.

Pre-salt exploration significantly expanded Brazil's oil and gas reserves, positioning the nation on a trajectory to become a major global producer and exporter of these resources. Moreover, Brazil holds great potential in wind and solar power generation, along with a robust bioenergy sector. The country ranks fourth in global agricultural production and has the world's second-largest hydroelectric power generation capacity. As of 2021, nearly half (45%) of Brazil's energy matrix consists of renewable sources, a figure projected to approach 50% by 2031. In a global context, speakers therefore highlighted that Brazil stands as one of the world's most renewable-driven economies among the largest global economies.

Speakers shared that biotechnology and bioenergy are also important sectors domestically, with the share of renewable energy and biofuels plants surging from 14% in 2019 to the current 45%. Projections anticipate this figure reaching 48% by 2031. The country hosts over 360 ethanol-producing plants and more than 50 biodiesel facilities within its borders. The demand for these biofuels is on an upward trajectory, with a projected 30% increase in demand over the next decade.

According to the panel, biofuels play a pivotal role in Brazil's decarbonization strategy. Initiatives such as the National Alcohol Program (Proálcool) in the fifties and seventies, combined with subsequent policies, have driven the increased utilization of biofuels in the country's energy matrix. Factors contributing to this progress include the production of flex-fuel vehicles that offer the flexibility to use gasoline, ethanol, or their blends. Additionally, the abundance of sugarcane and other feedstocks for ethanol production, coupled with the necessary infrastructure, has catalyzed the adoption of ethanol. Brazil's approach to decarbonization enables flexibility in biofuel production routes.

To translate these programs and investments into reality, an analysis of Brazil's policies and international initiatives in biofuel production is essential. Programs like Proálcool introduced mandatory ethanol blending into gasoline and tax incentives for ethanol usage. Two decades later, the Brazil Biodiesel Program (PNPB) was launched to promote

biodiesel production. More recently, Brazil has aligned with international efforts, such as the Carbon Offsetting and Reduction Scheme for International Aviation (CORSIA) in 2016 and the RenovaBio policy in 2017. RenovaBio focuses on reducing carbon intensity in the transportation sector, fostering the expansion of biofuels usage, establishing a carbon market, and offsetting greenhouse gas emissions from fossil fuels. Brazil has introduced specific programs for hydrogen production and the Fuels of the Future Program in 2021. This program seeks to boost the utilization of sustainable and low-carbon intensity fuels while promoting national vehicle technology compatible with biofuels.

According to the panel, Brazil, with an array of resources, including oil, ethanol, soy, and various bioenergy sources, seeks to reduce carbon intensity and advance its energy transition through diverse technological alternatives and biofuel applications. The country possesses the abundance and diversity of energy resources required to meet its intended nationally determined contributions. Its regulatory framework, supported by a suite of incentive programs, fosters the development of the energy market and biofuels sector. Brazil's openness to establishing energy trade relations underscores the country's potential role in the global energy transition. Petrobras' focus on the Asian market, for example, underscores Brazil's commitment to enhancing its participation in the energy transition and expanding its energy production potential in alignment with global markets such as ASEAN's.

Brazil has a surplus of research and feedstock resources. However, it does face challenges with technology infrastructure, which many of these countries already possess. Therefore, it is important to foster collaboration to share resources and develop technology that is not tied to specific sources. Brazil and ASEAN should prioritize sharing strengths, according to the speakers. In this spirit, Brazil can open itself to receiving ASEAN technology and engaging with the Association in a collaborative manner.

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“Brazil's openness to establishing energy trade relations underscores the country's potential role in the global energy transition.”

Participants



Opening and Moderation

Léa Reichert

Projects Manager at CEBRI

Speakers



Ambassador Piragibe dos Santos Terragô

Born in 1952 in Santiago, RS, Brazil. Graduated from Rio Branco Institute (Diplomatic Academy) in 1974. Joined the diplomatic service in 1974. Ambassador since 2004. Main diplomatic posts include Deputy Permanent Representative to the UN in New York, ambassador to Ottawa, ambassador to The Hague and Consul-General in Hong Kong. At headquarters, in Brasília occupied positions as Undersecretary-general for Africa and the Middle East and Head of the Economic Department. Currently is the Special Envoy of Brazil to ASEAN.



Nuki Agya Utama

Nuki Agya Utama was appointed as the Executive Director of the ASEAN Centre for Energy (ACE) in August 2019 reporting directly to the Governing Council consisting of Leaders of the Senior Offices on Energy from the ASEAN member states. Nuki Agya Utama has research background as Post-Doctorate in Graduate School Energy Science Kyoto University for energy scenario planning in South East Asia. Holding PhD, with research on Life Cycle Energy Analysis from University of Technology King Mongkut (KMUTT), Thailand. He has extensive experiences in both energy industry as well as academics. Before taking the assignment as Executive Director, he had worked at Baryon HP as Director. He also working in international organizations such as UNDP and UNEP as consultant. He had started his international career with ENVIMA a German-Thai consulting firm working on renewable energy, energy efficiency and environmental consulting. He had also been served as the Head of Environmental Engineering department at Surya University, Indonesia and as senior lecturer in Swiss German University, Indonesia. Nuki has also assigned as chief editor and editorial board for some International Journal as well as reviewer and authored several publications, in international conferences, journals and scientific article particularly in the field of energy, environment and buildings. His interest among others is renewable energy, green buildings and energy efficiency.



Juliana Rangel do Nascimento

She is a Chemical Engineer with a degree from UERJ and a degree in Chemistry from UFRJ. She has an extensive academic and professional background. In addition to these degrees, she earned a postgraduate degree in Environmental Chemistry from UERJ and another in Downstream Process Engineering from PUC-RJ. Her commitment to continuing education led her to obtain an MBA in Project Management from the renowned Getúlio Vargas Foundation (FGV-RJ). Her commitment to academic research led her to a Master's Degree in Chemical and Biochemical Processes from the School of Chemistry at UFRJ. With more than a decade of dedication to the oil market, having worked for both PETROBRAS and the Federal Government, she has accumulated a wealth of experience. Within EPE (Empresa de Pesquisa Energética), her focus is on the development of studies, research and projects aimed at refining capacity, transportation infrastructure and the storage of oil and oil products. It also plays a key role in formulating policies related to the marketing of oil, its by-products and the petrochemical industry. Constantly monitoring technological developments in the areas of refining, transportation and distribution of oil and oil products is an integral part of its work. In addition, she is responsible for managing critical databases related to the supply sector, contributing to more effective and informed management of the country's energy market.



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