



**Move  
Like  
Never  
Before**

**38<sup>TH</sup> ANNUAL GENERAL MEETING  
PETRONAS DAGANGAN BERHAD**





PETRONAS

# Move Like Never Before



Operating Environment

FY2019 Performance

*“Move Like Never Before”*

Sustainability Commitment

2020 Look Ahead



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Operating Environment

FY2019 Performance

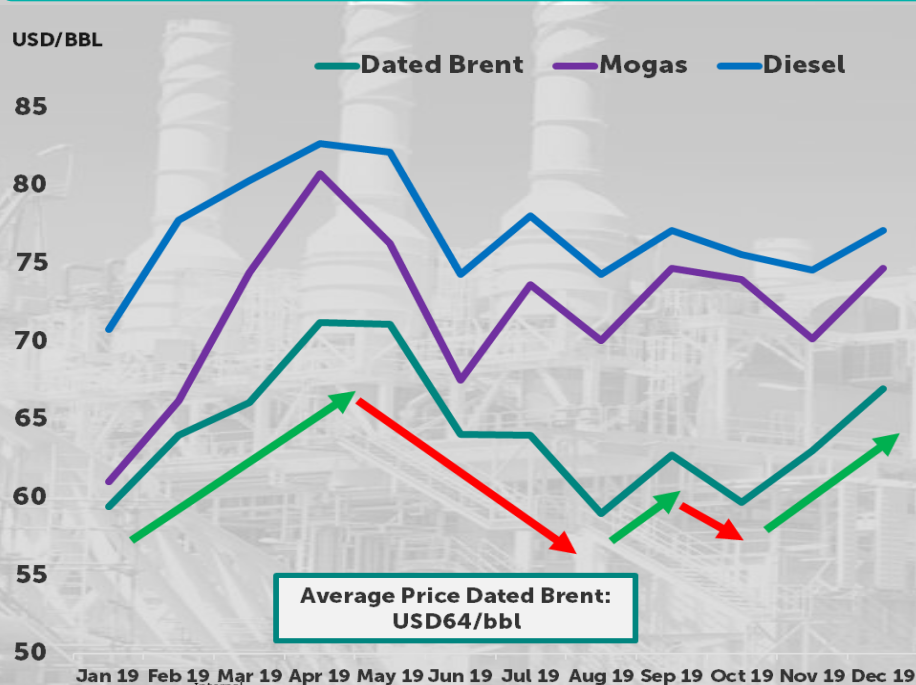
*“Move Like Never Before”*

Sustainability Commitment

2020 Look Ahead

# PDB transformation journey continued amid a moderate challenging backdrop

## Moderate volatility in oil prices



## Moderate economic growth

	2019	vs. 2018
• Malaysian GDP	4.3%	↓ 0.4%
• Inflation	0.7%	↓ 0.3%
• Consumer Sentiment Index (CSI)	86.2	↓ 21 pts
• Manufacturing Index (MI)	122.7	↑ 4 pts
• New Car Sales (Unit '000)	604	↑ 1.0%

## Changing Trends in Consumer Preferences

Environmentally Responsible

Convenience & Personalisation

Preference for Digital Tools



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# Solid performance with consistent delivery of shareholders' value...



**RM837.6**

**PAT** (RM Million)

**RM1,129**

**PBT** (RM Million)

**85.0**

**Dividend** (Sen)

**104.0**

**Dividend Payout Ratio** (%)

# ...on the back of commendable volume growth in 2019

Million Litres

15,013.8



FY2015

15,107.2



FY2016

14,916.5



FY2017

14,882.6



FY2018

15,638.1



FY2019

5.1%



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***“Move Like Never Before”*** is beyond a slogan



***Seamless and Frictionless  
Customer Experience***



***Innovation in Business***



# Our growth strategy is anchored on four key pillars

**1**

**Strengthening Market Leadership**

**2**

**Being Safe, Reliable and Efficient**

**3**

**Great Place to Work**

**4**

**Digitally Enabled**



1

# Strengthening Market Leadership RETAIL BUSINESS



# Creating seamless and frictionless customer experience



**7.0%**

Volume growth



**70**

Refurbished stations



**50**

Look and Feel of *Kedai Mesra*



**20.0%**

New Mesra concept store - JKAL



# Selective Expansion of Network Stations

**Largest  
network**

**Operationalised**

**8**

**new stations**



**New Modular Design at Taman Wawasan Johor**

# Launch of New PETRONAS Primax95 with Pro-Drive

**NEW**

## **PETRONAS PRIMAX95** *with Pro-Drive*

- ✓ **SMOOTH**
- ✓ **RESPONSIVE**
- ✓ **EFFICIENT**

**AVAILABLE AT**

**ALL**

**STATIONS NATIONWIDE**

**CUSTOMER DRIVEN  
DEVELOPMENT**

**PRODUCT  
DEVELOPMENT  
RIGOR**



# Innovative ROVR fuel delivery solutions

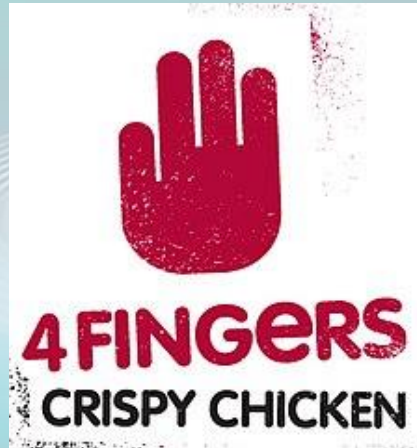


9

- **Serving B2B Market**
- **Potential B2C Expansion**
- **CAPEX Efficient**



# Kedai Mesra established new strategic QSR partnerships...



Changing Consumer Preferences



# ...Mesra Redemption Partners

[www.mymesra.com.my](http://www.mymesra.com.my)



Got the championship-winning fuel?

PETRONAS mesra  
900 7899

Team Backpack    Team Duffel Bag    Team Cap

Now get the look!

BIG XCHANGE

Convert & win **BIG**

1 MILLION BIG Points

RM 2,000 worth of PETRONAS Fuel

PETRONAS    AirAsia    BIG LOYALTY



# Targeted marketing campaigns and promotions



Virtual Mesra Card for Customer Convenience



Successful Nationwide Campaigns



Strategic Marketing Partnership



**16.0%**

**NEW Kad Mesra Sign-Ups**



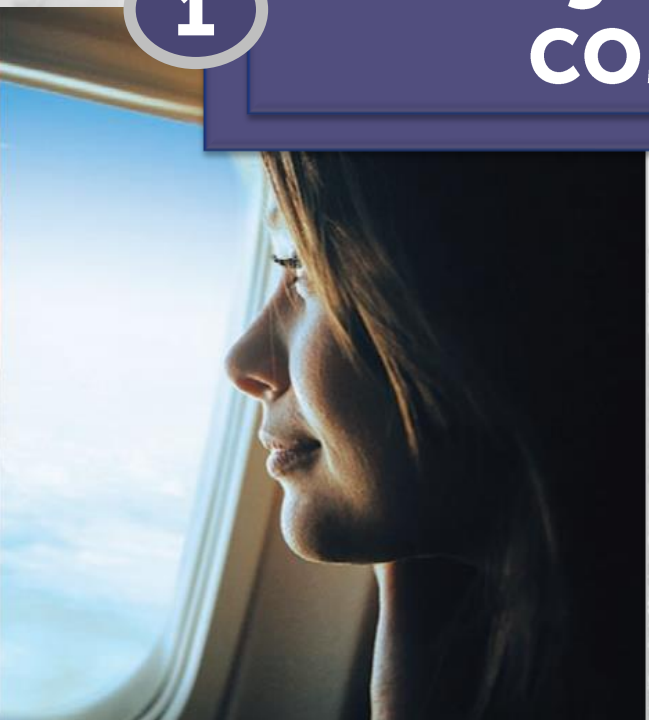
**12.0%**

**ACTIVE Kad Mesra Members**



1

# Strengthening Market Leadership COMMERCIAL BUSINESS



# Leveraging on our assets for continued growth

Volume growth of

 **4.2%**

## Key Initiatives

- Regular engagements with customers
- Increasing number of direct customers
- Focusing on cost efficiency and reliability



# Improved volume growth across main products



↑ **4.3%**

**Jet A-1 Volume**

↑ **7.2%**

**Diesel Volume**



1

# Strengthening Market Leadership LPG BUSINESS

# Solidified our position as the market leader in LPG

Volume growth of

 **1.0%**

 **14** New Dealership

 **23** New C50 Commercial Customers

 **20** Availability of LPG Cylinders Stations





1

# Strengthening Market Leadership LUBRICANT BUSINESS



# Significant growth in our power brands

- ↑ **52.0%** PETRONAS Sprinta with UltraFlex™
- ↑ **14.0%** PETRONAS Syntium with CoolTech™
- ↑ **9** PETRONAS AutoExpert (from April)

## Success Factors

- Product Innovation - Track to Road
  - Leveraging on Formula1 success
  - MotoGP satellite team success
- AutoExpert
  - Stringent selection of partners
  - Encouraging demand



# Expansion across commercial channels



**13.0%**

**Direct Channel**

Continued long-term strategic  
partnerships with

**PROTON** and **PERODUA**



**SAFE, RELIABLE AND EFFICIENT**



# High HSE standards among employees and contractors



**Rakan Khidmat  
Penghantar achieved**



**87.0%**

2018: 80.0%

**Category A Rating**



**Generative HSE  
Culture**

**Doing the Right Things  
All-The-Time**

# World class HSE performance



**89.9%**

2018: 87.6%

**Operational Equipment Effectiveness - LPG**

Improvement of

**99.3%**

2018: 98.0%

**Timely Product Delivery - Aviation**

**Resultant:**

**Primary**

**14.3%**



**Secondary**

**2.7%**

**Distribution cost**





**GREAT PLACE TO WORK**

# Creating a high performance culture



**3,250** Man-days  
Employees upskilling



HSE Training to  
**>650**  
Contractors/Suppliers



**6 Office Floors**  
Conducive work environment



Leaders Engagements  
**≈ 50**  
Alignment & Morale



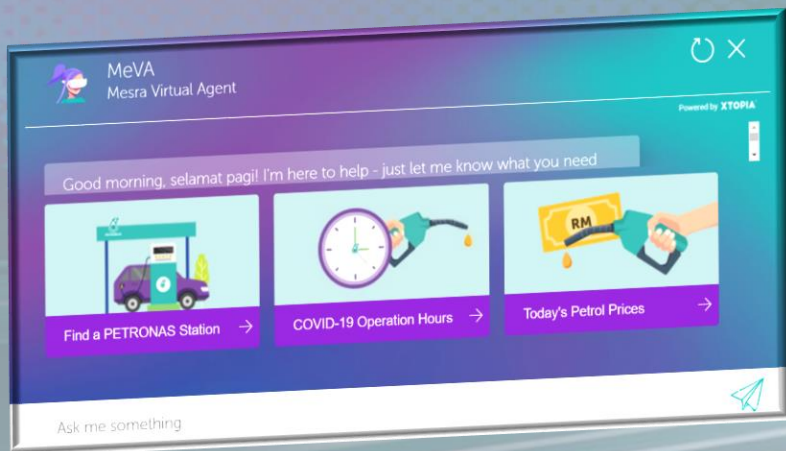
**DIGITAL TECHNOLOGY**

# Digitally enabled to leverage the power of technology



**Upgrade**  
**A new generation Point of Sales**

**Upgrade**  
**Outdoor Payment Terminals**



**MeVA (AI Powered Chatbot)**

- **Improve customer engagement**
- **Reduce phone call traffic**  
( ↑ efficiency )

# Setel's growth on track



Available at

**740**

2019: 285

**PETRONAS Stations Nationwide**

**>1.1 Mil**

2019: 0.52M

**Setel Users**

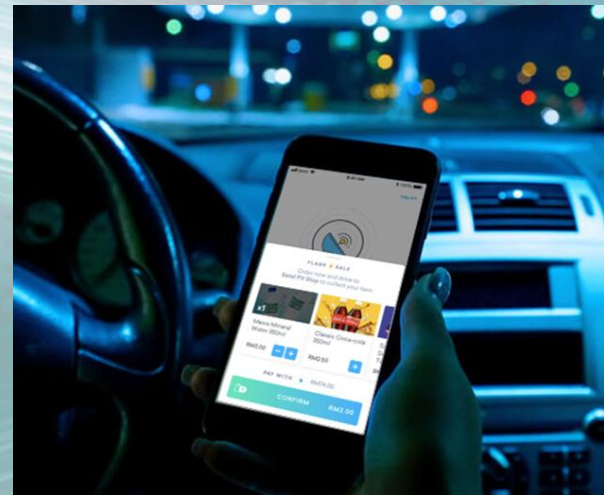
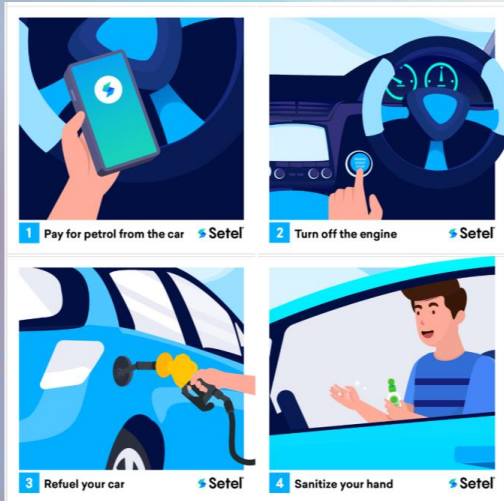
**84**

2019: 71

**Net Promoter Score**

# Minimise Contact, Maximise Safety

Everything from the comfort of your car. Perfect for everyone on-the-go.



**Lexx Chang** Yup, been using this app since before mco.. Really convenient, especially can track my fuel spends every time..

Like · Reply · Message · 10h



1



**David Tee**

Hi, to this setel apps, how can i get this setel apps, really good because no need to bring any money to pay at counter and really safe

Like · Reply · Message · 1d



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# Sustainability at PDB



**Solar panels:  
5 new stations**



**Available at 60 stations  
since 2018**



**77,000 Litres  
rainwater harvested  
and reused**



**Reducing Carbon  
Footprint at our  
Stations**

# Community outreach through signature CSR programmes

**PETRONAS Coffee Break**

More than **13 Mil** cups of coffee served since 1998



**PETRONAS StreetSmart**  
Reached more than

**5,000** students since 2013



**Water for Life**

Benefitted **8,650** villagers since 2013





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# Immediate focus in the wake of COVID-19

1

**Protecting the safety of our employees, customers and business partners**



2

**Ensuring our eco-system remain robust**



3

**Cash preservation**



# Coming out stronger post Covid-19

1

**Adjusting to  
new trends**

2

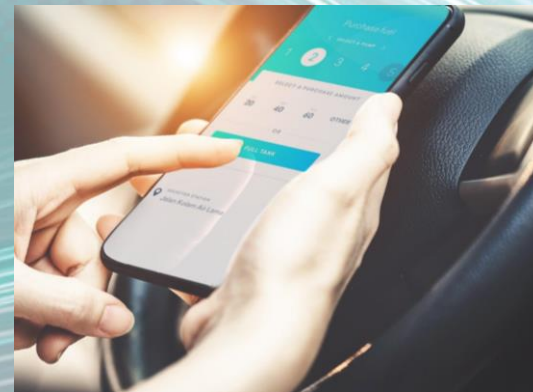
**Increasing  
collaborations**

3

**Accelerating  
digitalisation**



**Enhance food  
offerings**



**Accelerated adoption  
of e-wallets and digital  
economy**

# Summary

**1** Strengthening Market Leadership



**2** Being Safe, Reliable and Efficient



**3** Great Place to Work

**4** Digitally Enabled





THANK YOU

[www.mymesra.com.my](http://www.mymesra.com.my)

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