

# FLASH FLOODS & LANDSLIDES IN SUMATRA:

## *Mapping Economic Disruptions and Sectoral Exposure*

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**Executive Summary:** Flash floods and landslides in Sumatra over the past few weeks have not only impacted humanitarian aspects, but also have the potential to disrupt economic activity and regional supply chains. Disruptions to road access, electricity, telecommunications, and logistics distribution place several natural resource-based and infrastructure sectors in a vulnerable position, while simultaneously creating limited opportunities for certain sectors that may benefit from high rainfall.

This analysis maps the linkages between disaster-affected areas, listed companies with asset or operational exposure in those regions, and commodities or production outputs that may be affected, both from a risk and opportunity perspective. The study focuses on the Provinces of Aceh, North Sumatra, and West Sumatra, using an economic-capital market approach.

## **ANALYTICAL BASIS: HARD DATA VS ECONOMIC INFERENCE**

This analysis is grounded in hard data in the form of disaster-affected area maps and emergency response dynamics from BNPB, including casualties, displaced persons, and priorities for reopening access and logistics distribution. The status of telecommunications infrastructure recovery refers to official statements from Telkomsel regarding progress in restoring sites in Aceh, North Sumatra, and West Sumatra, including operational dependence on PLN electricity supply, and is therefore treated as a short-term operational fact.

Mapping of issuers and asset locations is conducted through primary corporate sources (official websites, annual/sustainability reports, IDX/EREPA documents). Meanwhile, economic inference is used to assess potential production or distribution disruptions due to damaged access, electricity, logistics, and labor, not as a claim of realized output declines.

## **1. MAPPING AFFECTED AREAS → ISSUERS → COMMODITIES**

### **A. ACEH**

Main short-term issues: regional access, electricity, and telecommunications.

- **Agribusiness / CPO**

- **AALI (Astra Agro Lestari)**

- Has exposure to plantations and palm partnerships in Aceh (Aceh Singkil, Aceh Barat, Aceh Jaya). The main risk is operational, particularly delays in harvesting and distribution of FFB to palm oil mills due to disrupted road access and flooding.

- **Oil & Gas (Upstream)**

- **MEDC (Medco Energi Internasional)**

- Has upstream oil and gas activities in Aceh through Block A (Medco E&P Malaka). Key risks include material mobilization, facility access, and potential operational downtime if supporting infrastructure is disrupted.

## **ENRG (Energi Mega Persada)**

Has several oil and gas working areas in Sumatra, including Aceh. Media reports mention assets affected by flooding in Sumatra, therefore the risk of operational disruption needs to be monitored through company disclosures.

- **Telecommunications Infrastructure**

### **TLKM (Telkom Indonesia) – Telkomsel**

Service recovery in Aceh is highly dependent on the stability of electricity supply. As long as power has not fully recovered, digital service quality and logistics coordination may remain constrained.

## **B. NORTH SUMATRA**

Impact characteristics: combination of agribusiness, energy, and mining.

- **Gold**

### **UNTR (United Tractors)**

The Martabe gold mine is located in South Tapanuli. There are no reports of direct production disruptions, but key risks stem from road access, logistics supply (fuel and chemicals), and workforce mobilization.

- **Agribusiness / CPO**

### **LSIP (PP London Sumatra Indonesia)**

Has plantations and historical operations around Medan. Risks are logistical and operational at plantations and mills.

### **ANJT (Austindo Nusantara Jaya)**

Operates palm plantations in Binanga and Padang Sidempuan. Potential risks relate to FFB distribution and plantation activities.

### **SMAR (Sinar Mas Agro Resources and Technology)**

Has assets and mills in North Sumatra and Jambi. The main risk lies in the smooth supply of raw materials and product shipments.

### **SIMP (Salim Ivomas Pratama)**

Has plantation exposure in North Sumatra. Impacts are primarily operational and distribution-related.

- **Geothermal (energy system context)**

Sarulla Geothermal (Tapanuli)

A major geothermal project, but not a direct IDX-listed entity. Relevant as context for access risks and the regional electricity system.

## **C. WEST SUMATRA**

Impact characteristics: logistics and distribution corridors.

- **Coal**

- **PTBA (Bukit Asam)**

- Main mining bases are located in South Sumatra, but PTBA has historical linkages with facilities and distribution routes in West Sumatra (Ombilin and Teluk Bayur). The primary risk relates more to ports and logistics rather than core mining production.

- **Agribusiness / CPO**

- **UNSP (Bakrie Sumatera Plantations)**

- Has historical plantation exposure in Sumatra. However, detailed asset locations in West Sumatra require further confirmation before being categorized as directly affected.

## **SPECIAL CASE: PERTAMINA ROKAN / DURI-DUMAI REFINERY**

Pertamina RU II Dumai and Sungai Pakning refineries in Riau have a combined capacity of around 170 thousand bpd and are a key node for fuel supply in western Indonesia. Refinery feedstock is linked to Minas and Duri crude (Rokan Block). If the Riau–Rokan corridor is affected by flooding or disruptions to electricity and utilities, the main economic risk lies in fuel supply resilience and rising logistics costs. However, the impact on the equity market is indirect, as Pertamina is not an IDX-listed entity.

## **Blessing In Disguise? HYDRO POWER PLANT (PLTA/PLTM)**

Extreme rainfall has the potential to act as a tailwind for hydropower plants, provided physical facilities remain safe and sedimentation is well managed.

### **KEEN – Kencana Energi Lestari**

PLTA Pakkat is located in Humbang Hasundutan Regency, North Sumatra, which is included in BNPB-affected areas. There are reports of landslides in the project area and temporary suspension of operations. As such, the benefit of high water inflows may be constrained by physical and access risks.

### **HGII – Hero Global Investment**

PLTM Parmonangan (Parmonangan-1 and 2) is located in North Tapanuli Regency, an area recorded as disaster-affected. To date, there have been no public reports of facility damage. Potential upside from high water inflows is conditional and requires confirmation through operational updates.

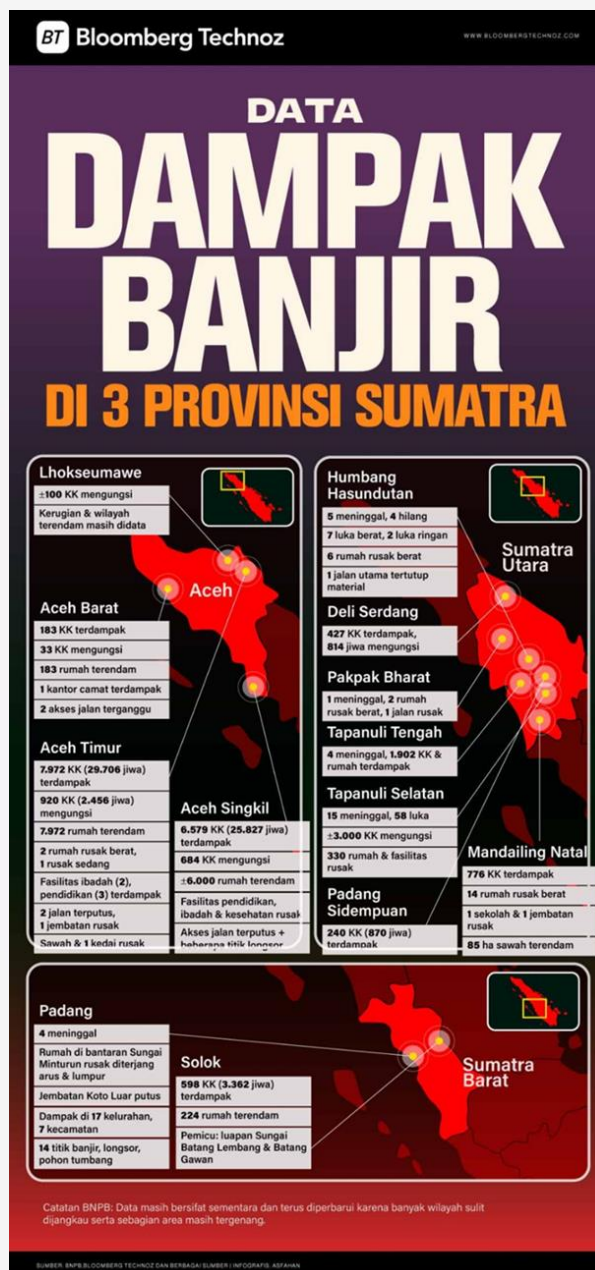
### **ARKO – Arkora Hydro**

PLTM Batang Toru is located in South Tapanuli Regency, North Sumatra, which falls within BNPB-affected areas. There are no public reports of damage or operational shutdowns. High water inflows may increase power output, with key risks related to sedimentation, access, and O&M costs.

**In a Nutshell:** Floods and landslides in Sumatra create short-term pressure on logistics-based, agribusiness, oil and gas, and mining sectors, primarily through disruptions to access, electricity, and distribution. There are no indications of systemic risks to national production, but localized operational impacts must continue to be monitored through corporate disclosures.

On the other hand, the hydro sector represents one of the few potential beneficiaries from high water inflows, although such benefits are highly dependent on asset conditions and operational access. Overall, the impact of these disasters is more relevant as a regional operational and supply chain issue rather than a factor driving long-term fundamental changes for the affected issuers.

Sources: National Agency for Disaster Management (BNPB), Bloomberg Technoz.





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