

# Vietnam Electric Comprehensive Report Q4.2016

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## Abstracts

At present, China and USA are 2 biggest electricity consumption countries of the world in 2015. Growth rate of the world average electricity price in the period 2011-2015 was about 1.75%. Electricity price is forecasted to continue increasing in the period 2015-2040.

Since 2005, Asia has come over Europe and North America to become the largest electricity production area of the world. The main reason is the strong growth of leading economies in Asia – Pacific, such as: China, Japan, Korea, Singapore, etc.

Up to now, electricity industry is still a high monopolistic industry when Vietnam Electricity (EVN) is the only buyer and seller in the market. Over 10 years, Vietnam electricity industry always supplements the supply to keep up with the growth of demand. Average growth of supply from 2010 – 2015 reached 12.1%. Electricity production of the first 9 months increased 11.4% compared to 2015 (for the joining grid of 2 hydroelectricity plants and 1 thermoelectricity plant).

3 main electricity sources are Hydroelectricity, Gas thermoelectricity and Coal thermoelectricity, accounting 95% of total electricity capacity of the year. In the first 9 months of 2016, hydroelectricity contributed only 23.3% of total electricity production while it used to take up over 45% of total production. Coal thermoelectricity rose and became the leader in the supply as climate change resulted in low water flow of hydroelectricity lakes all over the country, especially in the Central and the South.

Imported electricity reduced over the years. Since 2010, electricity purchase has been reduced as national electricity system has been added new electricity sources along with slower development of the economy that made demand increase slightly.

Vietnam's electricity loss had a downward trend but was still high in the first 9 months

of 2016, the rate of electricity loss was from 7.95%, reducing 0.1% over 2015 but still at high rate. The reason was that Vietnam electricity system (for natural geographical features), was long, spreading load, low contribution of industry, about 53.7% while contribution of resident was 35.11%, causing disadvantage for reducing electricity loss.

Annually, although installation capacity is always over load peak, the system is always under the pressure of high supply, especially in dry season. Rotating electricity cuts happen in many areas. These electricity cuts are often in the places which are overloaded electricity transmission capacity while it is difficult to add substation, innovate line, improve transmission capacity.

At present, EVN has monopoly on segments of regulation, wholesale, transmission and distribution/retail.

Vietnam is one of countries that use electricity least effectively in the world. Average electricity intensity in recent 10 years of Vietnam is 0.91 kWh/USD.

Electricity companies are divided into 3 groups: Group of electricity generation companies; Group of electricity regulation and transmission companies; Group of electricity distribution and retail companies.

In group of electricity generation companies, profit after tax of gas electricity companies is higher than thermoelectricity or hydroelectricity companies.

Net revenue of electricity distribution and retail companies is much higher than electricity generation.

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