



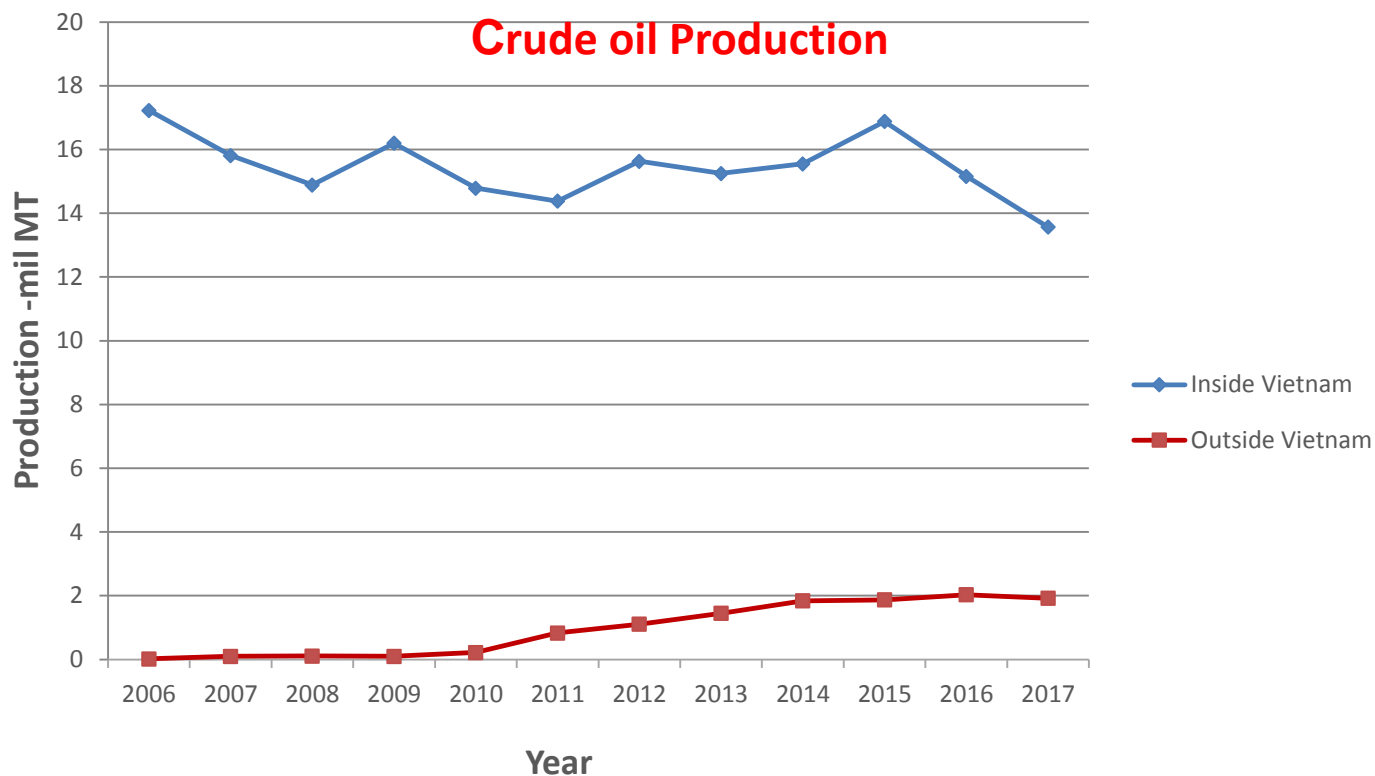
**MOIT OF  
VIETNAM**

# **UPDATE ON OIL AND GAS SECURITY IN VIETNAM**

**Oil, Gas and Coal Department  
Ministry of Industry and Trade of Viet Nam**

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## Oil and Gas Supply and Demand Situation



Year	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	Total
Inside Vietnam	17,23	15,81	14,89	16,20	14,79	14,38	15,63	15,25	15,55	16,88	15,16	13,57	<b>12</b>	197,34
Outside Vietnam	0,02	0,10	0,11	0,10	0,22	0,83	1,11	1,45	1,84	1,87	2,03	1,95	<b>1,98</b>	13,61
<b>Total</b>	<b>17,25</b>	<b>15,91</b>	<b>15,00</b>	<b>16,30</b>	<b>15,01</b>	<b>15,21</b>	<b>16,74</b>	<b>16,71</b>	<b>17,39</b>	<b>18,75</b>	<b>17,19</b>	<b>15,52</b>	<b>13,98</b>	<b>210,95</b>

## Oil and Gas Supply and Demand Situation

- Export destination for crude oil

No	Country	Year	2011	2012	2013	2014	2015	2016	2017	2018
		I	Total (mil.ton)	8,240	9,251	8,406	9,306	9,181	6,850	6,801
II	Destination (%)									****
1	ASEAN	19.6	22.1	22.2	29.3	22.4	17.2	31.4	***	
2	Australia	17.8	20.7	22.5	24.8	14.9	7.3	9.3	****	
3	Japan	22.1	30.1	28.9	19.8	15.2	7.2	11.9		
4	China	15.2	12.7	9.3	17.0	23.6	56.5	36.1		
5	Korea	11.6	9.9	9.9	3.3	4.3	3.7	3.4		
6	Others	13.7	4.5	7.2	5.8	19.6	8.1	7,9		

## Oil and Gas Supply and Demand Situation

### ○ Historical (2008-2018) petroleum product demand and supply

Vietnam imports mostly petroleum product before 2010 and started producing for 30% petroleum product consumption from 2010.

*Unit: 1000 tons*

Petroleum Products	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
<b>Demand</b>	14,388	15,789	16,509	16,904	16,897	16,485	16,720	16,703	16,081	17,060	<b>18,60</b>
<b>Supply</b>	794	2,308	6,484	6,259	6,200	7,190	8,454	7,088	7,901	7,214	<b>10,103</b>
<b>Balance</b>	-13,594	-13,481	-10,025	-10,645	-10,698	-9,294	-8,276	-9,615	-8,180	-9,846	<b>-8,497</b>

## Oil and Gas Supply and Demand Situation

## ○ Historical (2009-2018) refinery capacity and production

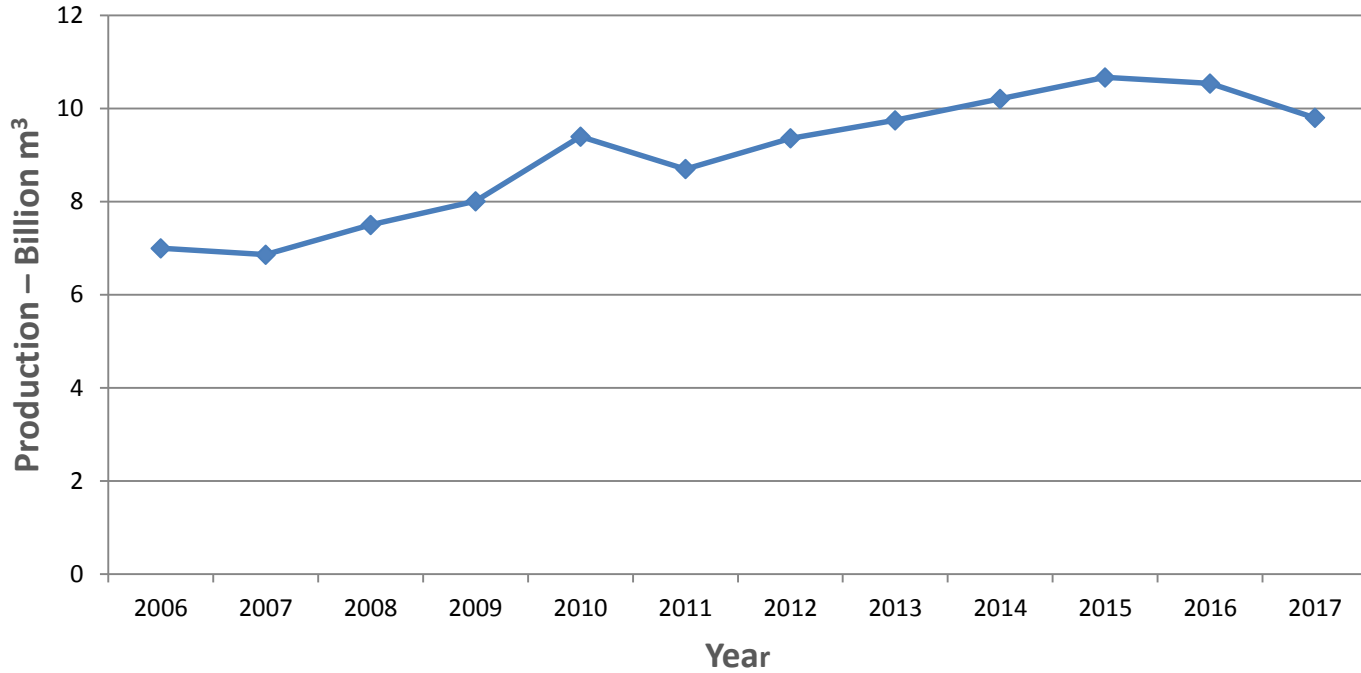
Year	Domestic crude oil	Import crude oil	Total (ton)
2009	2,337,777	0	2,337,777
2010	5,794,033	409,608	6,203,641
2011	5,343,235	710,108	6,053,343
2012	5,369,552	727,701	6,097,253
2013	5,973,784	1,288,428	7,262,212
2014	5,628,719	692,525	6,321,244
2015	7,155,967	181,946	7,337,914
2016	7,057,032	434,765	7,491,796
2017	6,212,000	1,180,927	7,392,927
<b>2018</b>	<b>7,340,000</b>	<b>5,168,165</b>	<b>12,508,165</b>

## ○ Petroleum products exports and imports

Petroleum Products	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Export	1,921	1,951	2,244	1,879	1,339	1,117	1,513	2,030	2,010	<b>3,116</b>
Import	12,706	9,583	10,678	9,200	7,364	8,461	10,045	11,753	12,856	<b>11,433</b>

**Oil and Gas Supply and Demand Situation**

**Natural gas production**



Year	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Production (billion m <sup>3</sup> )	7.00	6.86	7.50	8.01	9.40	8.70	9.36	9.75	10.21	10.67	10.54	9.80	10.01

**Oil and Gas Supply and Demand Situation**

**LNG Terminals**

**1. Cat Hai – Hai Phong LNG Terminal**  
 - Capacity: 3 MMTA  
 - Schedule: 2030 - 2035

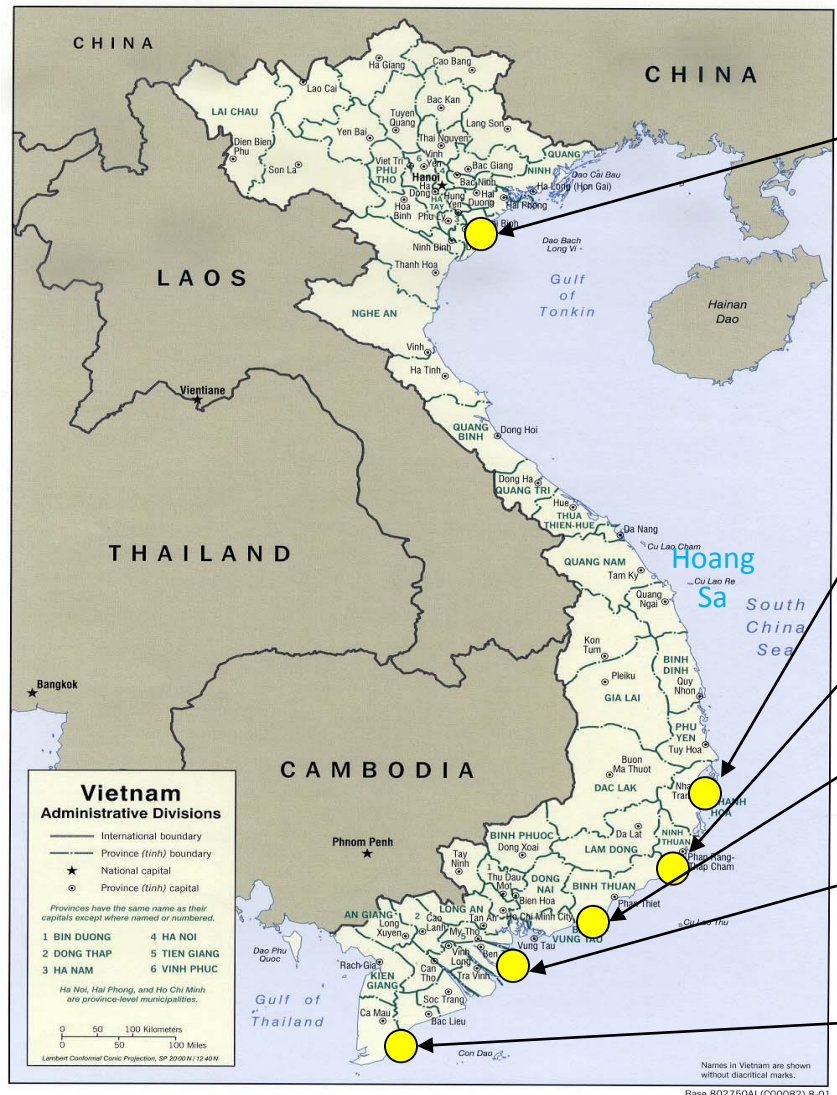
**2. Son My – Binh Thuan LNG Terminal**  
 - Capacity: 6-9 MMTA  
 - Schedule: 2023-2031

**3. My Giang - Khanh Hoa LNG Terminal**  
 - Capacity: 3 MMTA  
 - Schedule: 2030 - 2035

**4. Tan Phuoc – Tien Giang LNG Terminal**  
 - Capacity: 4-6 MMTA  
 - Schedule: 2022 - 2025

**5. Thi Vai – Vung Tau LNG Terminal**  
 - Capacity: 1 MMTA  
 - Schedule: 2020 - 2025

**6. Hon Khoai – Ca Mau LNG Terminal**  
 - Capacity: 3 MMTA  
 - Schedule: 2022 - 2026



# Oil and Gas Security Policy

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- **Update on Policy Framework on Supply Security**
- **Oil Supply Security Policy**
- **Oil and Gas Supply Security Framework**
  - Master plan for Oil and Gas Industry in period to 2025, vision to 2035;
  - Decree for Oil and Gas Exploration and Production
  - Master plan for Gas Industry;
  - Decree for Gas Business.
- **Oil stockpiling for crude oil and petroleum products**
  - Decree for petroleum product business: 30 consumption days of commercial stockpile; 15 days of crude oil for refinery production and 10 days for petroleum products of refinery production.
  - Master plan for Oil Stock pilling: The target of oil stockpiling: total 90 days of net import in 2020 (30 days of commercial stockpile; 30 days of refinery production and 20 days of national stockpile).



# Roadmap and scale of crude oil and oil product stockpiling system

**VIETNAM**

Type of stock		Stock quantity	2010	2015	2017	2020	2025
Commercial stock		Mil. Tons	1,3	1,4	1,5	2,6	3,6
		Days of consumption	30	30	30	30	30
Processing stock	Crude oil	Mil. Tons	0,4	0,4	0,5	1,5	1,5
		Days of consumption	10	10	10	15	15
	Products	Mil. Tons	0,2	0,4	0,5	1,5	1,5
		Days of consumption	4,6	10	10	10	10
National Strategic stocks	Crude oil	Mil. Tons	-	-	-	1	1,7
		Days of Consumption	-	-	-	6	6
	Products	Mil. Tons	0,4	0,4	0,4	1,2	1,4
		Days of consumption	9,2	8,7	8,5	14	14
Total oil stockpiling		Mil. Tons	2,1	2,6	2,7	5,9	9,3
		Days of consumption	53,8	58,7	58,5	75	75
		Days of net import	62	90	90	90	90

## Bilateral/Regional Agreements

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### Existing bilateral/regional agreements related to oil and gas supply security

- 1. The MOU between Vietnam and Lao Government for the petroleum product pipeline and storage project from Quang Binh - Vietnam to Kham Muon – Lao;**
- 2. The MOU/Agreements between PetroVietnam (Vietnam) and Rosneft (Federal of Russian) for the crude oil supply for the refinery.**
- 3. The Agreements between Vietnamese Enterprise and Foreign Enterprise (from Japan, Federal of Russian, US for the oil and gas cooperation, especially in LNG business).**

## Oil and Gas Security Policy Gaps

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- **For the international cooperation, the policy gaps that need to be addressed or policies that should be formulated and adopted to strengthen regional oil and gas security**
- **Cooperation in the conducting the domestic system for emergency preparedness.**
- **Exchange the information and experiences from each others, especially from Federal of Russia, Japan and US.**
- **Implementation of the agreements for Oil and Gas Security: APSA, ...**

**Thank you very much!**