

Viet Nam: Automobile industry situation and update policies for transitioning to green vehicles for environment protection

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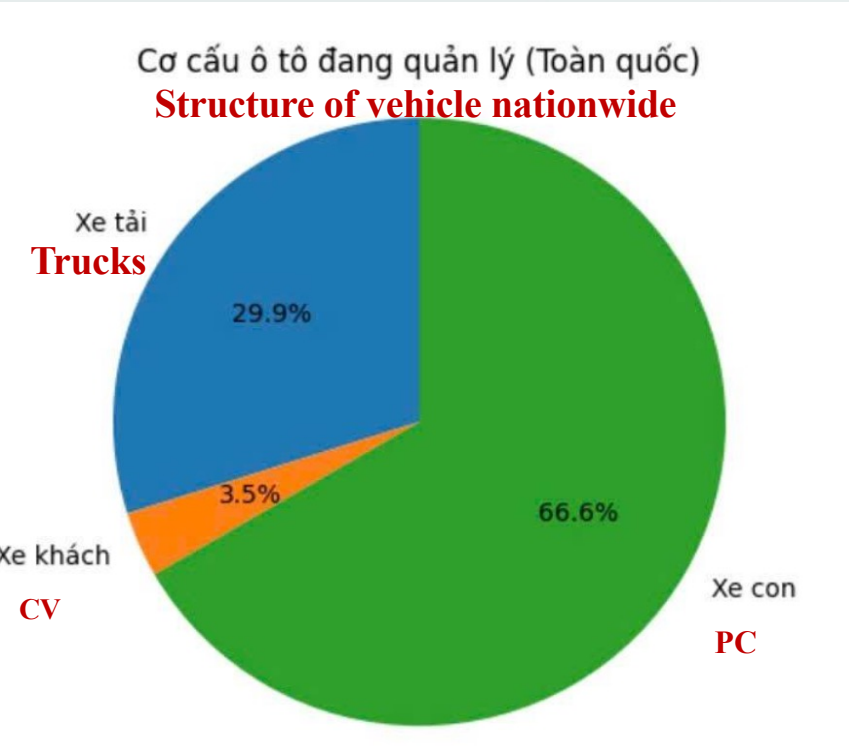
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1. Market review and Analysis



VN automobile situation:



◆ Vehicles: Nationwide new registrations: 624,300 units (+27% YoY 2024: 491,394 newly registered units)

Of which, newly registered EV: 110,898 vehicles. Top 5 localities with the most new registrations:

1. Ho Chi Minh City: 102,354 units, of which EV: 10,317 units.
2. Hanoi: 88,165 units, of which EV: 14,552 units
3. Hai Phong: 31,436 units
4. Bac Ninh: 30,721 units
5. Phu Tho: 26,930 units

◆ Trucks and container: In 2025, newly register 122,235 units +35% YoY2024 (89,943 units). Of which E-trucks: 77 units.

◆ Motors: Nationwide, newly registered: 3,234,189 units. Of which, newly EV: 507,274 units (+34.9% YoY2024: 2,397,129)

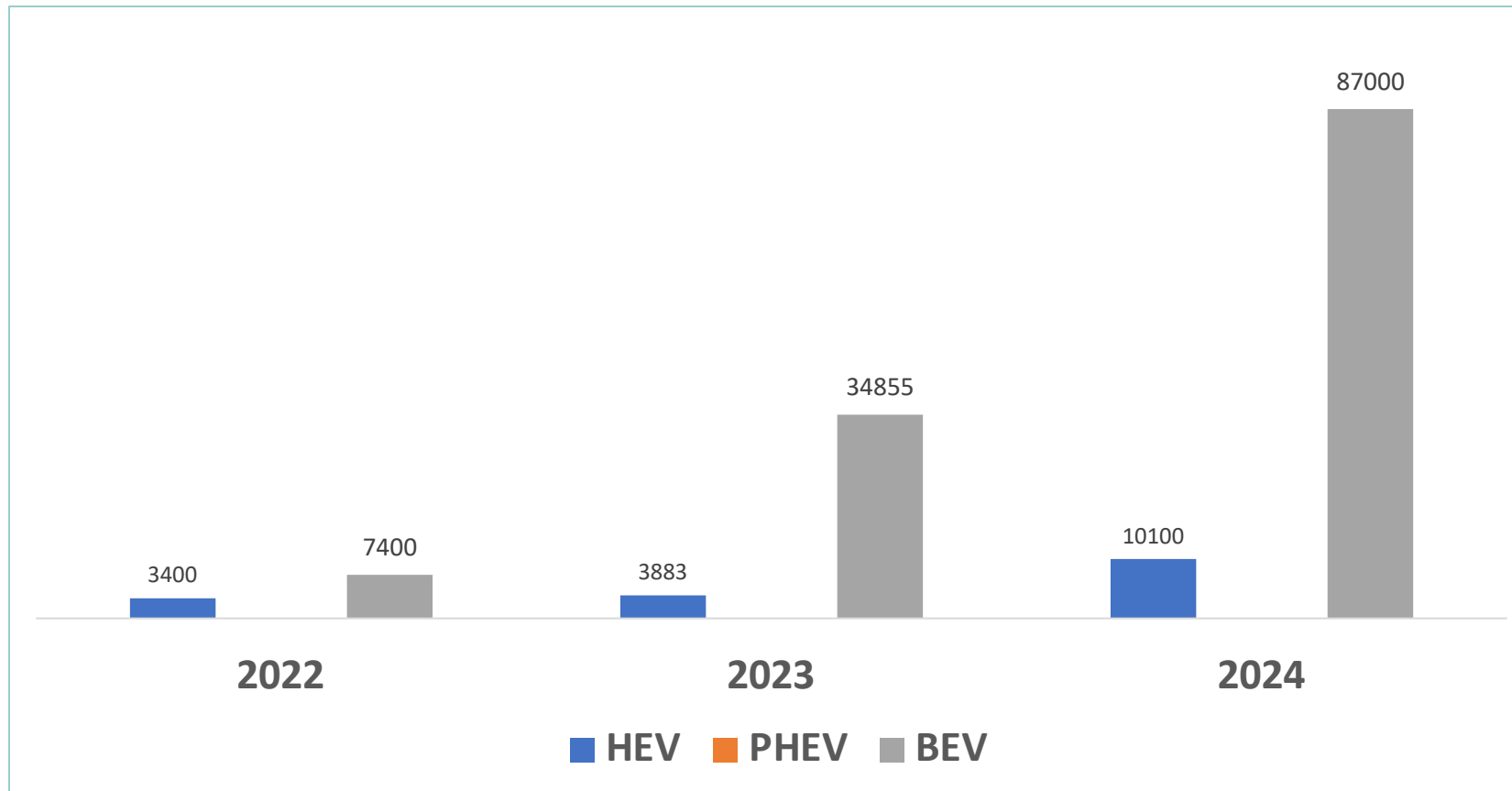
Source: Police Transportation Dept

OVERVIEW OF ELECTRIFIED VEHICLES IN VIETNAM

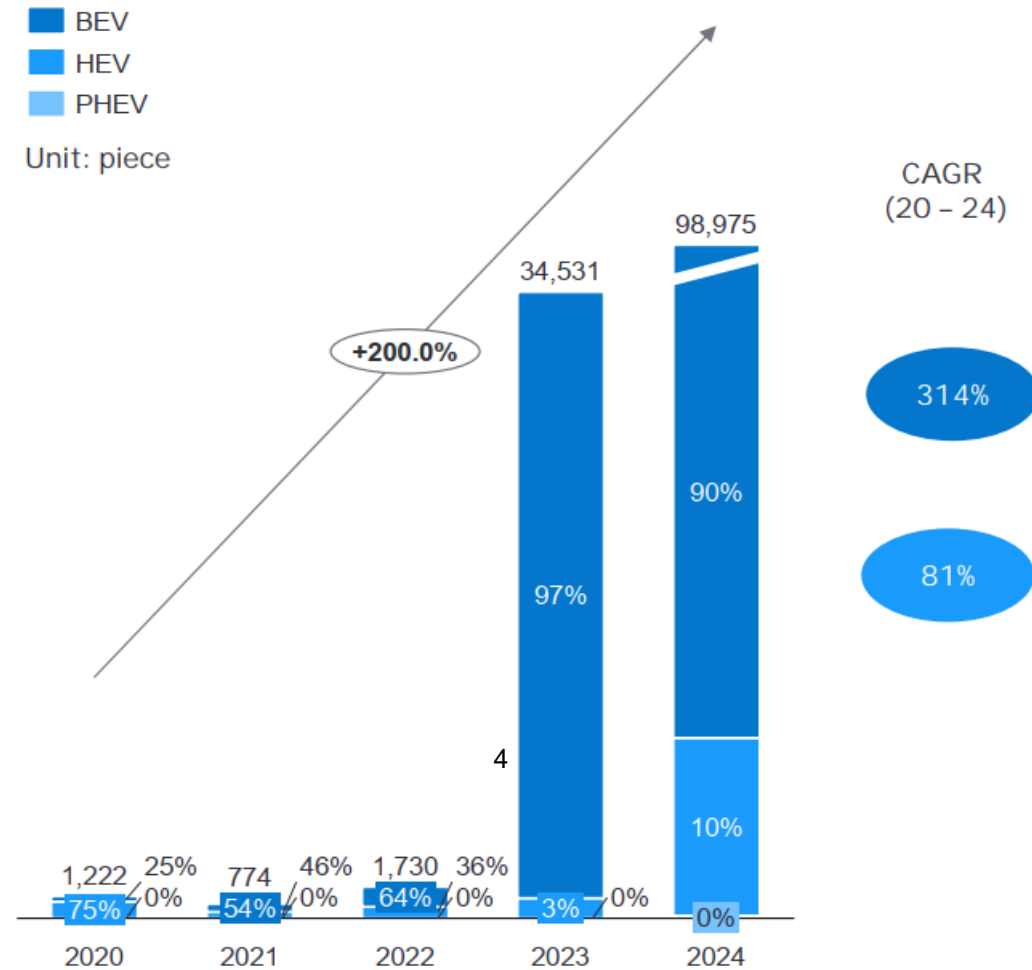
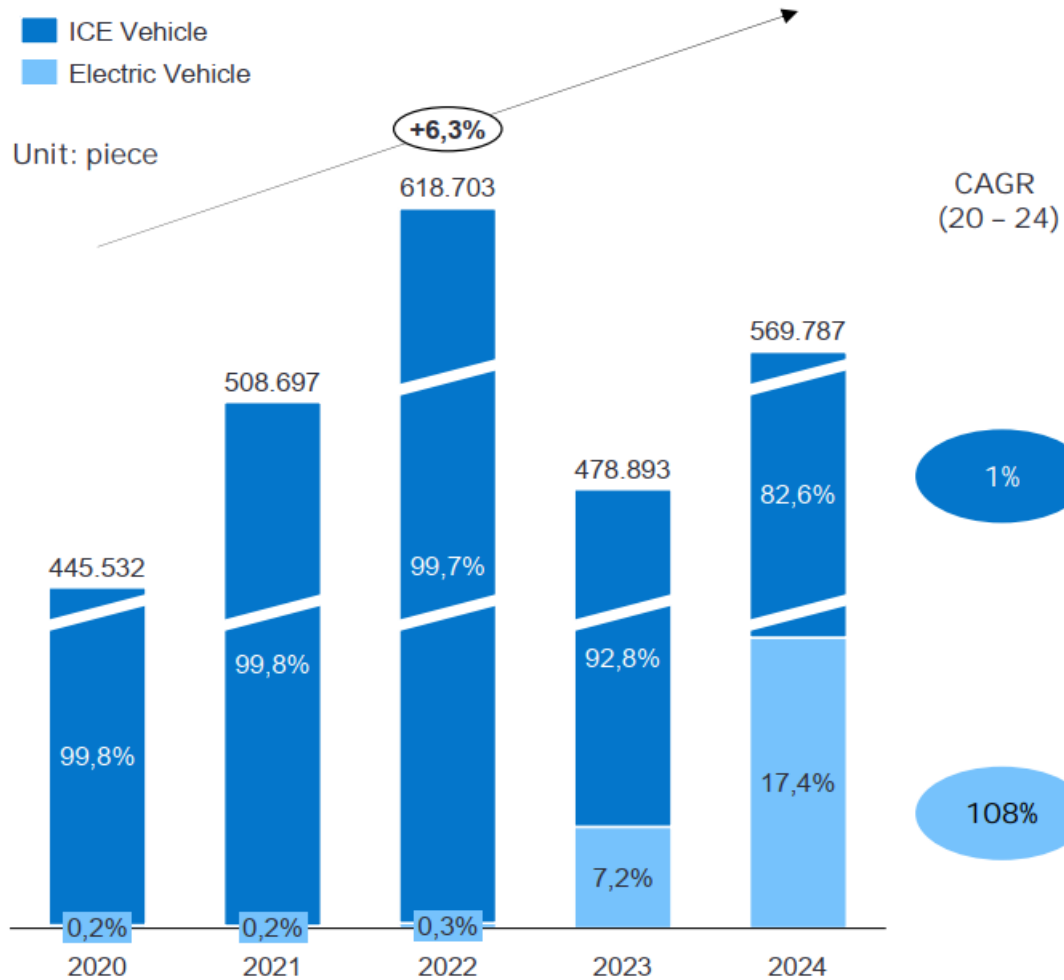


[Situation of electrified vehicles in Vietnam]

Sales of electrified vehicles in Vietnam have grown thanks to the majority of electric vehicle sales from Vinfast. Hybrid HEV models also have year-over-year growth.



EV-ICE market structure



Update Government's auto policies: **Directive 20 – LEZ & Hanoi's Resolution on transition to green vehicles**

Gov.'s Directive 20 (12 Jul 2025):

For Individual purpose

1/7/2026: Ban Fossil fuel (FF) motorbike in Ring Road (RR) 1

1/1/2028: Limit FF veh. in RR1,2

1/1/2030: Limit FF veh. in RR1,2,3

Limit FF vehicles:

- Fossil fuel motorcycle: Ban

- **Fossil fuel cars: limit**

Commercial purpose: Not regulation

Solution: Not mentioned

Government's auto policies:

Directive 20 – LEZ & Resolution on transition to green vehicles

Hanoi Resolution on LEZ issued in 27th Nov 2025:

For Individual purpose

1/7/2026: Implement LEZ in some area in RR1

1/1/2028: Implement LEZ in RR1 & some area in RR2

1/1/2030: Implement LEZ in RR1, 2, 3

- Ban motorbikes using FF on fixed hours
- **Ban cars using FF < level 4 emission on fixed hours**
- **Allow zero emission veh., green veh.**
- **Ban trucks ≥ 3,500 kg**

Commercial purpose:

- **Motorbike:** Ban FF motorbikes that operate business activities on app
- **Car & Truck: Follow same regulation with Individual purpose⁶**

Solution:

Supporting policy follow Resolution on transition to green vehicle:

- Monitor & apply administrative penalties for violated vehicle entry LEZ

Measures to develop infrastructure

Policy groups affecting the development of the automobile industry:

1. Strategy for developing the automobile industry, electric vehicle infrastructure and green energy.
2. Tax and fee policies including special consumption tax and ownership tax.
3. Environmental protection policy including recycling of discarded products, special environmental tax from the time of stopping selling CO2 emitting vehicles.
4. Testing and certification for electric vehicles.
5. Standards and regulations for electric vehicles and charging stations.



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Thank you very much

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