

Intertek

Intertek Vietnam Ltd.

**Vietnam Tapioca Market
Overview**

Prepared by: Mr. Trieu Vo

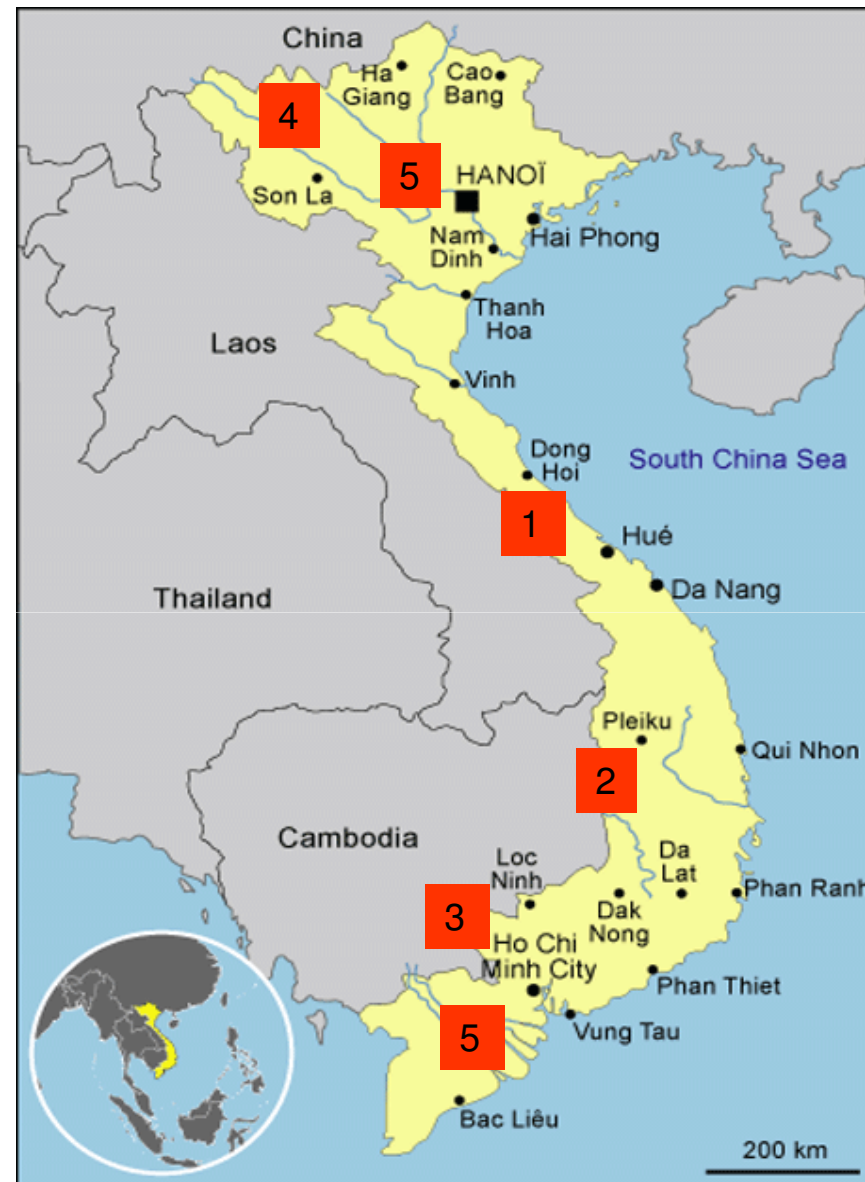
Agriculture and Marine Development Manager

Dated: November 2010

- 1. Area, Yield and Production of Cassava in Vietnam**
- 2. Production Region of Vietnam Cassava**
- 3. Tapioca Chips / Starch Production and Export**
- 4. Starch Mill Capacity**
- 5. Vietnam Tapioca Chips Load Port Allocation**
- 6. Vietnam Tapioca Chips Export Market Allocation**
- 7. Vietnam Ethanol Production Using Tapioca**

(* These unofficial figures are for reference only)

1. North Central and Central Coastal Area
2. Central Highlands
3. South East
4. Northern Midlands and Mountains Area
5. Mekong Delta Area and Red River Area

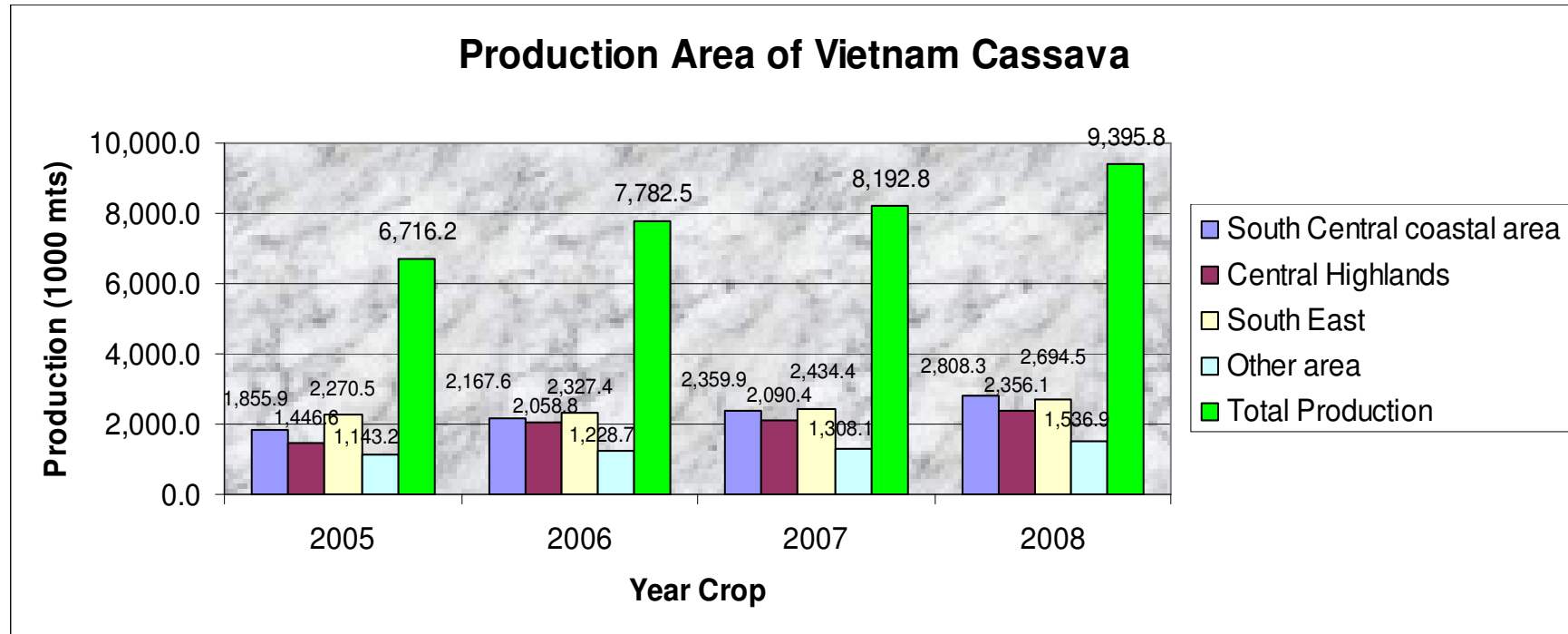


1. Area, Yield and Production

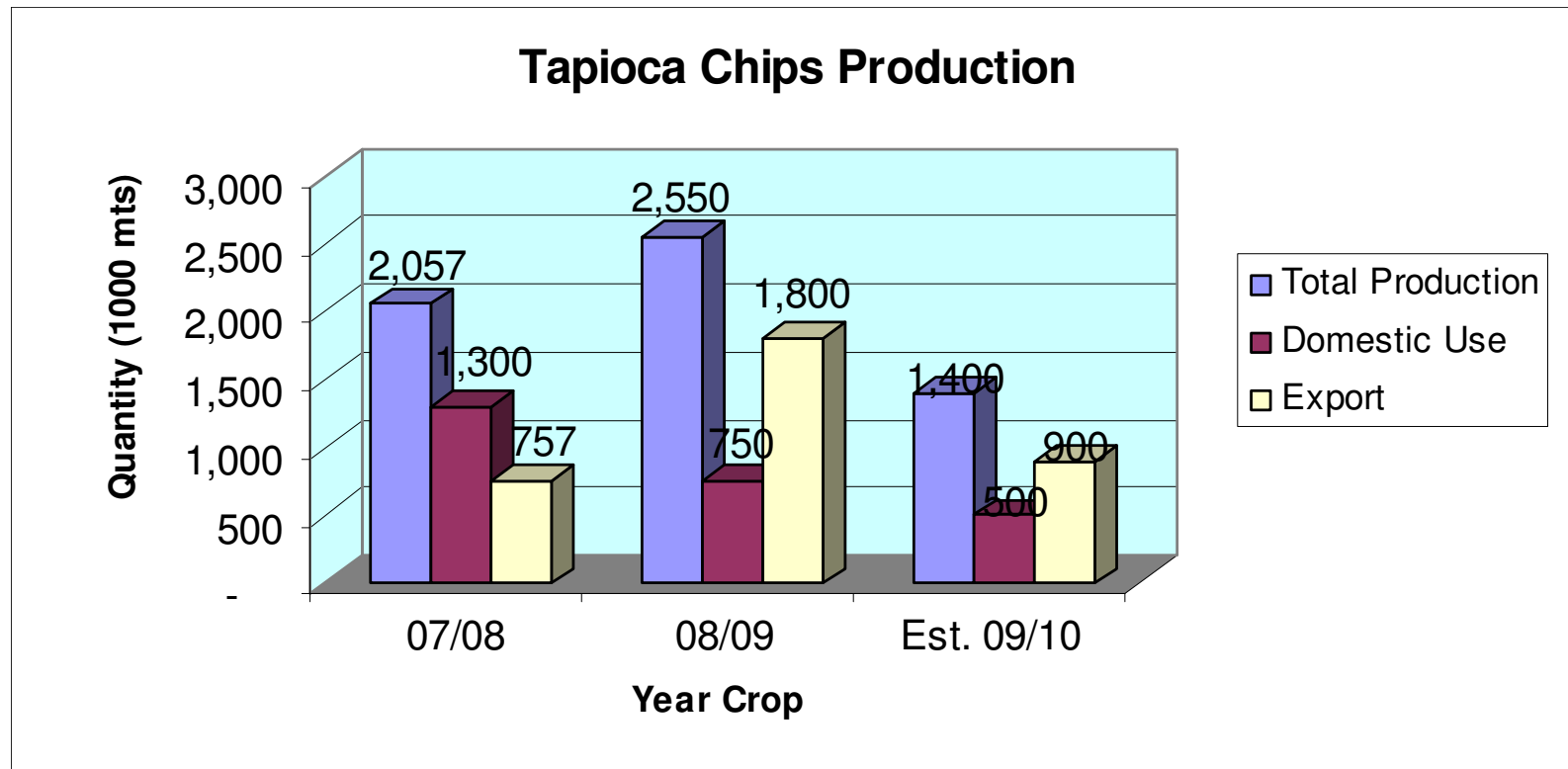
CROP	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
AREA (1000 HA)	237.6	292.3	337.0	371.9	388.6	425.5	475.2	495.5	557.7	560.0
YIELD (MT/HA)	8.36	12.01	13.17	14.28	14.98	15.78	16.38	16.53	16.85	10.07
PRODUCTION (1,000 MT)	1986.3	3509.2	4438.0	5308.9	5820.7	6716.2	7782.5	8192.8	9395.8	5637.0

SOURCE : FROM GENERAL STATISTIC OFFICE OF
VIETNAM AND UNOFFICIAL COLLECTION

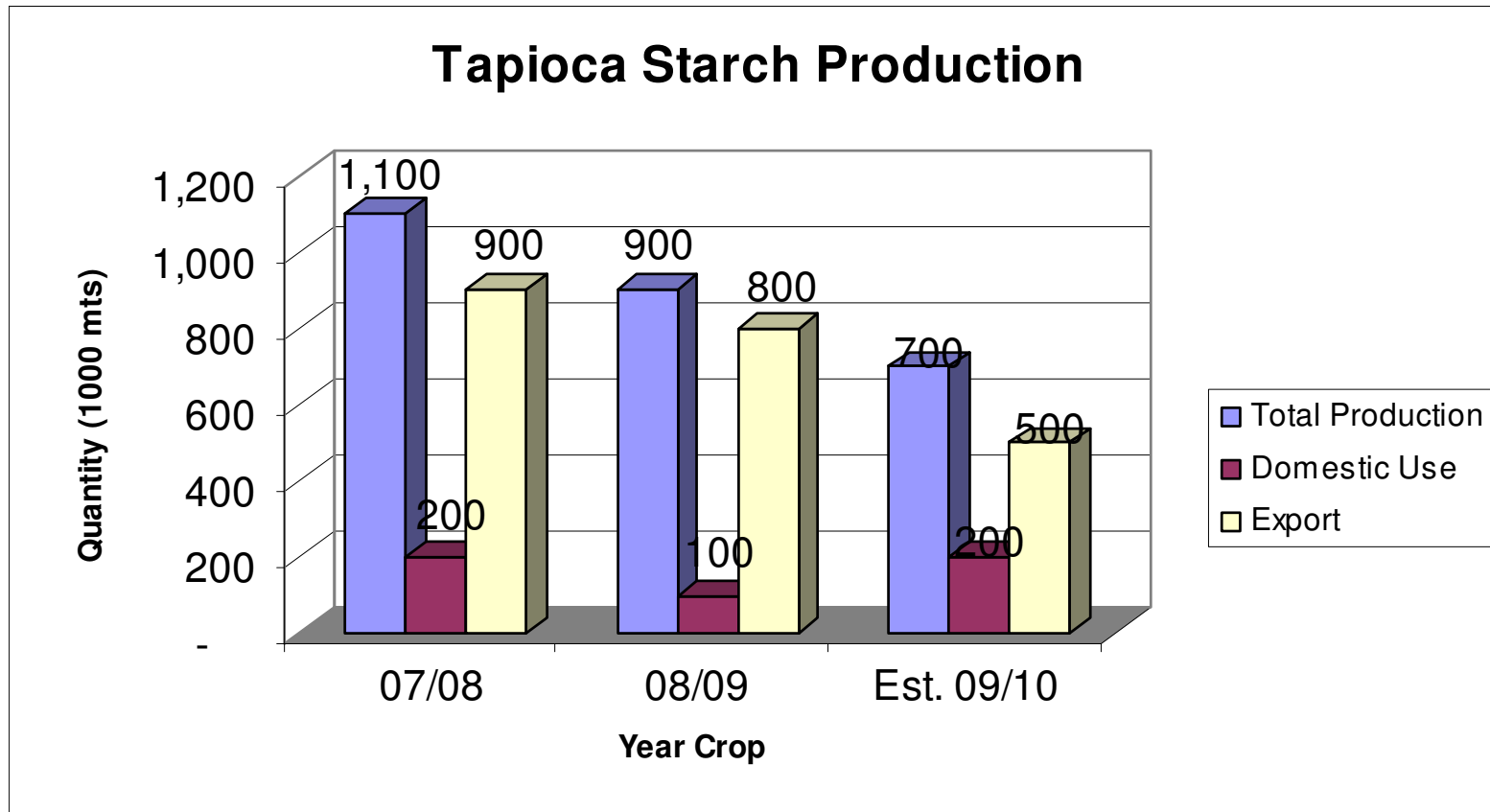
2. Production Region of Vietnam Cassava



3. Tapioca Chips Production and Export



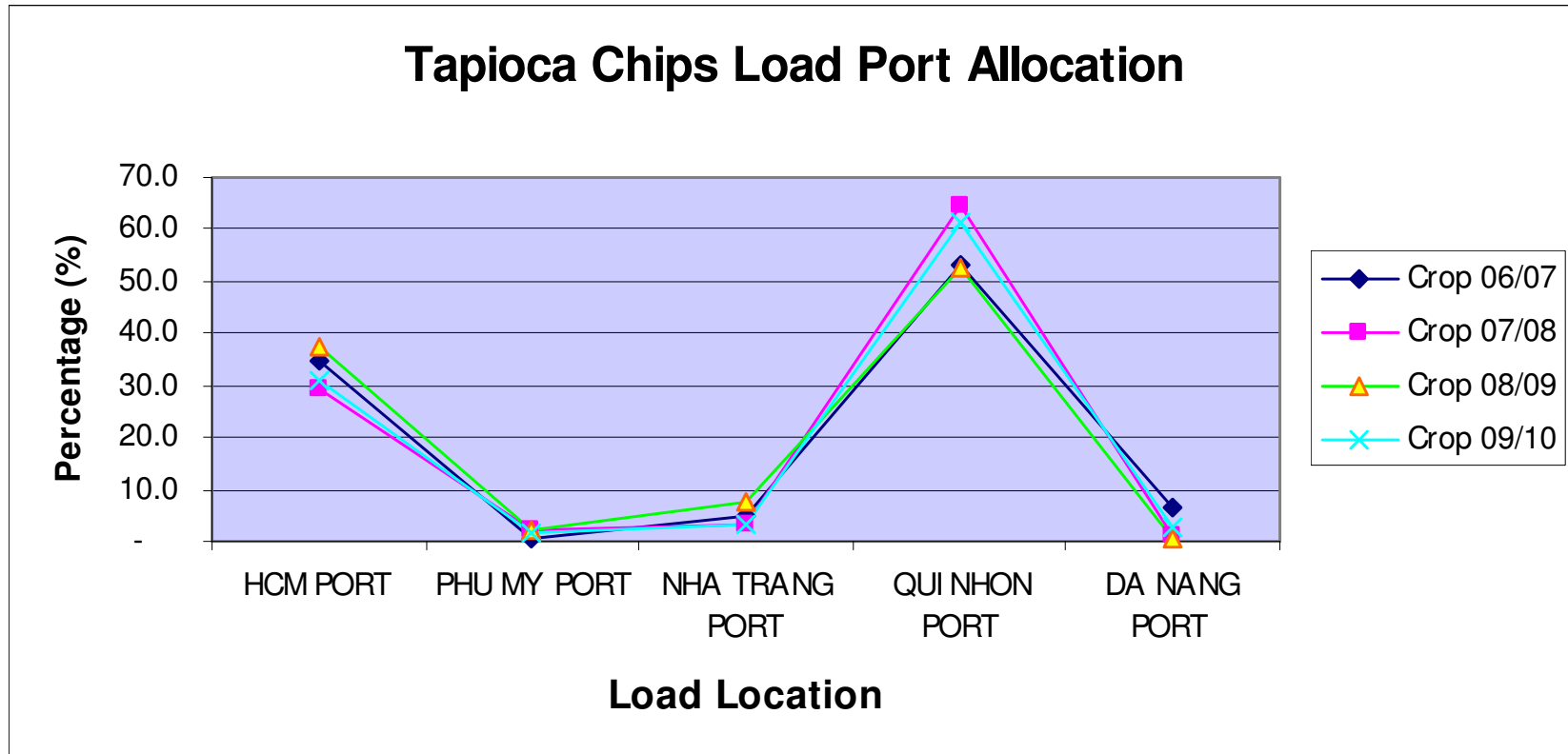
3. Tapioca Starch Production and Export



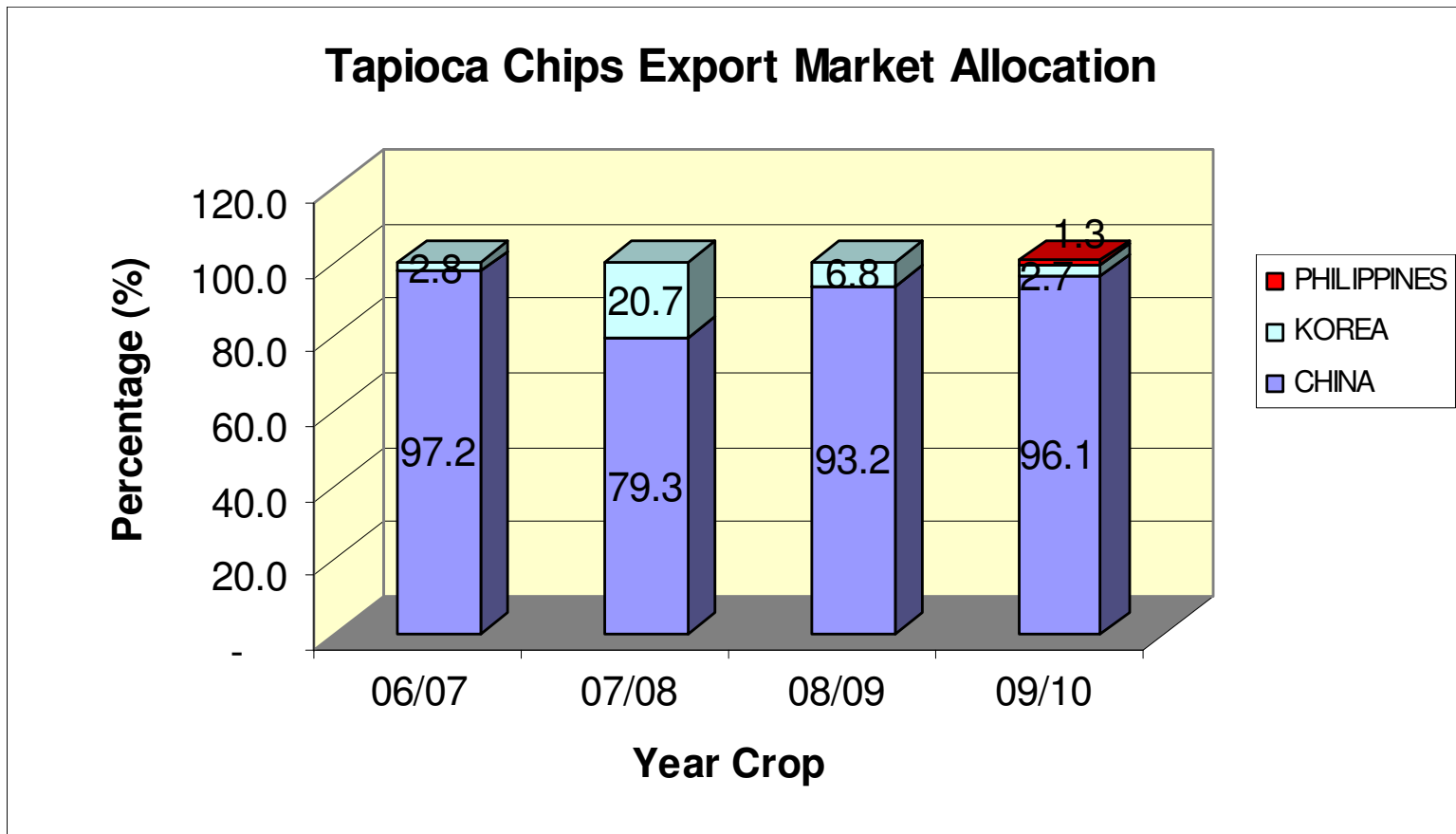
4. Starch Mill Capacity

AREA	NUMBER OF MILLS	MILL CAPACITY (MT)	RATE
Central Coast & highland	18	760,000	30%
Quang Nam	2	72,000	3%
Quang Ngai	3	90,000	4%
Phu Yen	2	72,000	3%
Kontum	3	166,000	7%
Gia Lai	4	180,000	7%
Dak Lak	4	180,000	7%
South East:	63	1,782,866	70%
Tay Ninh	53	1,292,186	51%
Binh Phuoc	4	140,400	6%
Dak Nong	1	42,120	2%
Dong Nai	4	252,000	10%
Binh Thuan	1	56,160	2%
whole country	81	2,542,866	100%

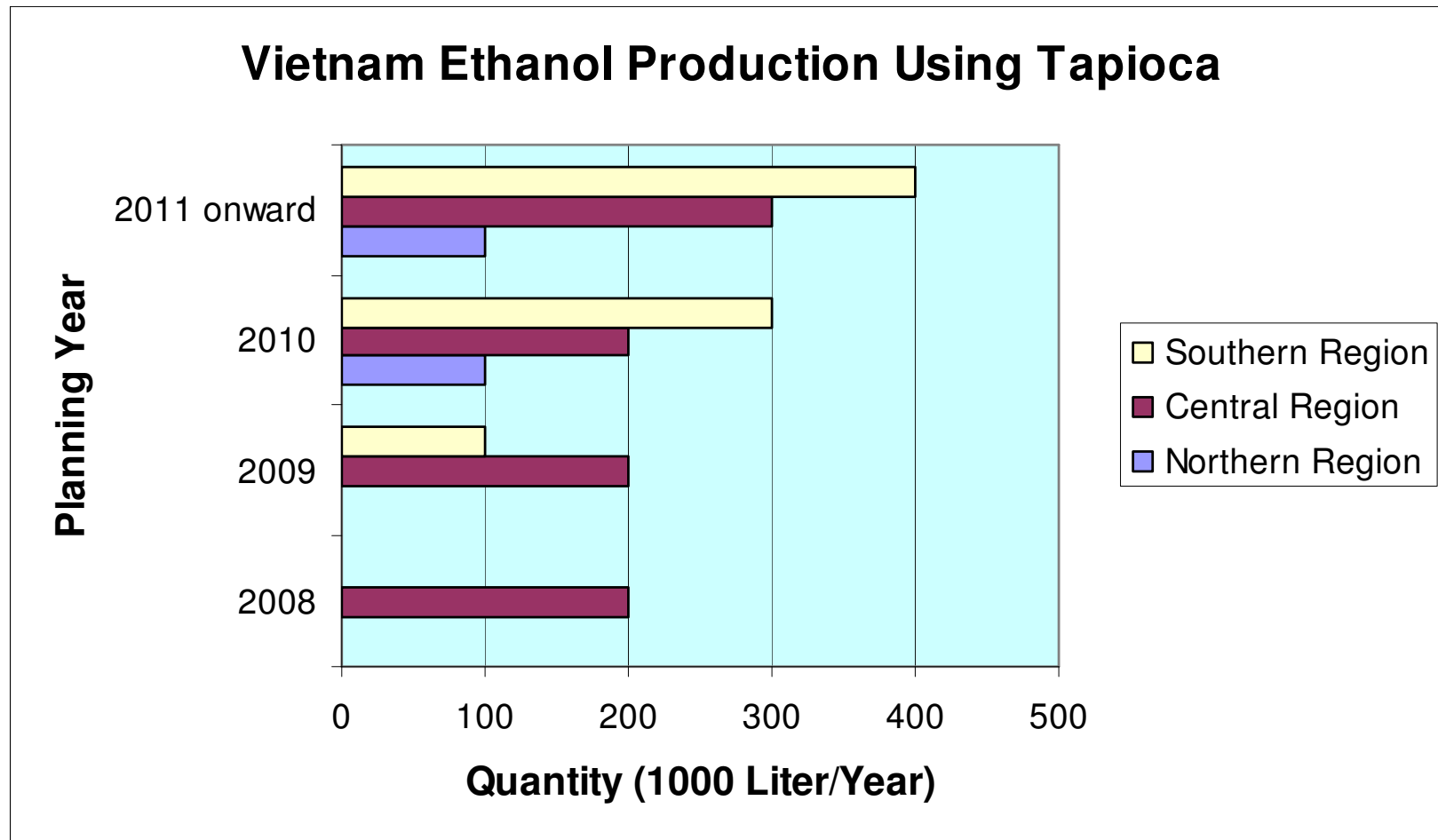
5. Vietnam Tapioca Chips Load Port Allocation



6. Vietnam Tapioca Chips Export Market Allocation



7. Vietnam Capacity of Ethanol Production Using Tapioca



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