



Transforming the market to make sustainable palm oil the norm

**RSPO**

Roundtable on Sustainable Palm Oil

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Technical manager Europe

# Following the market

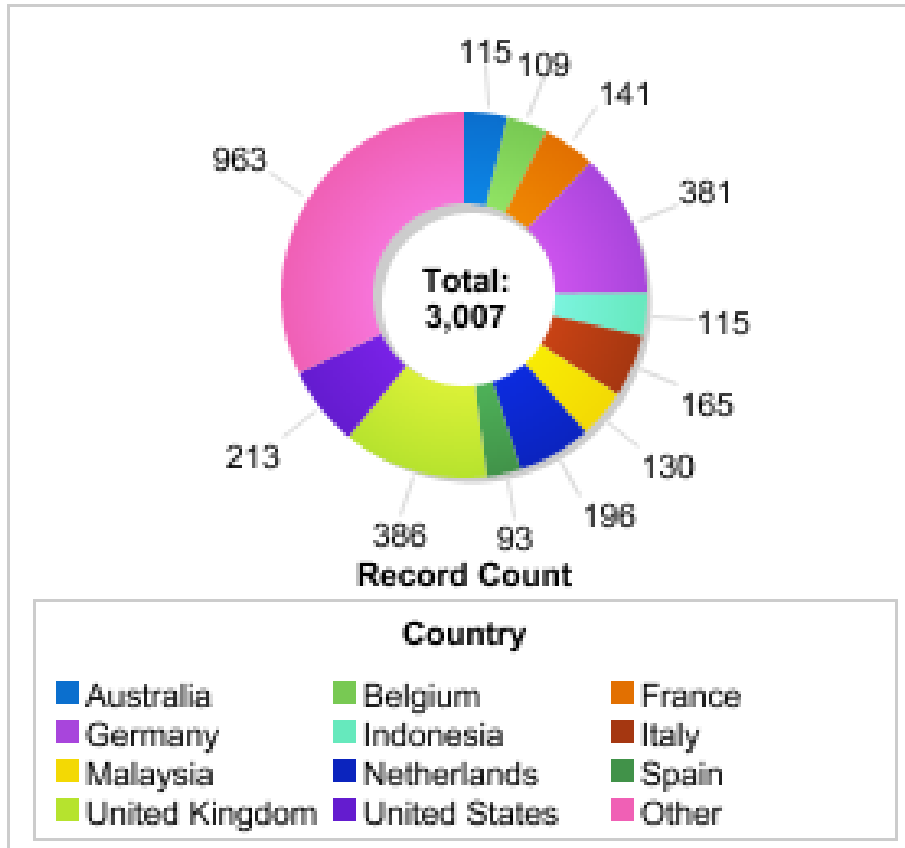
- RSPO members
- Palm oil consumption
- Imports and use
- RSPO eTrace
- National and government commitment
- Uptake
- Linking markets with supply



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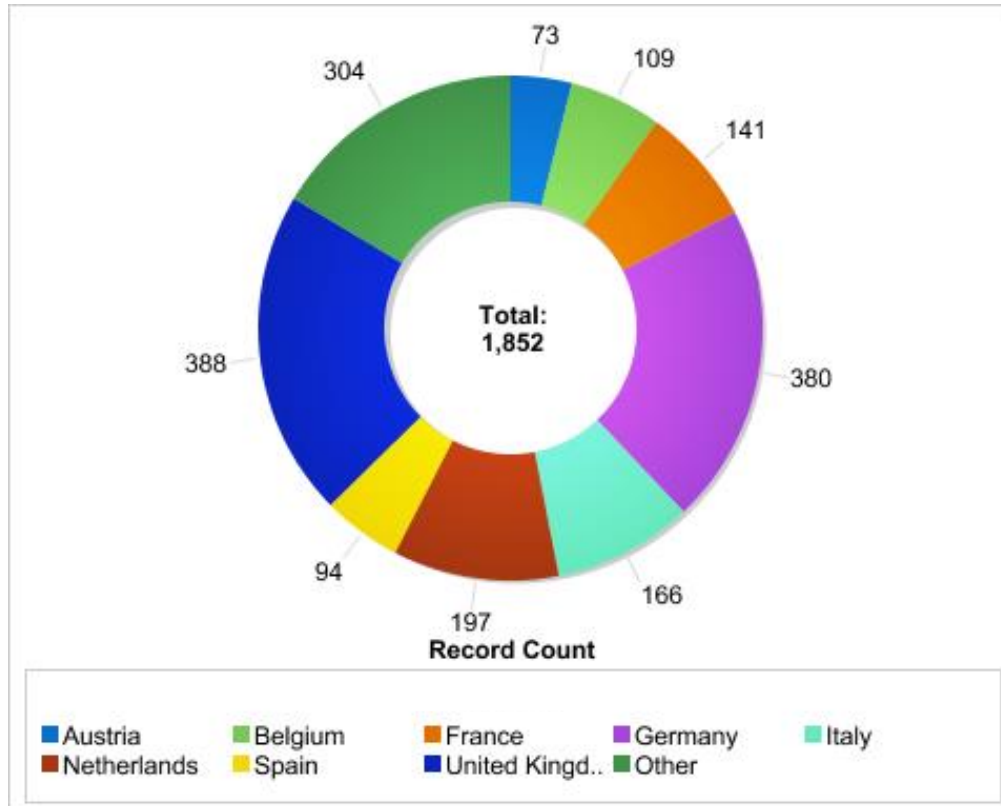
# RSPO members August 2016



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# RSPO members in Europe



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# Palm oil consumption

1. India	9,3 million tonnes
2. Indonesia	7,3
3. Europe	7,2
4. China	5,8
LATAM	3,4
US	1,1

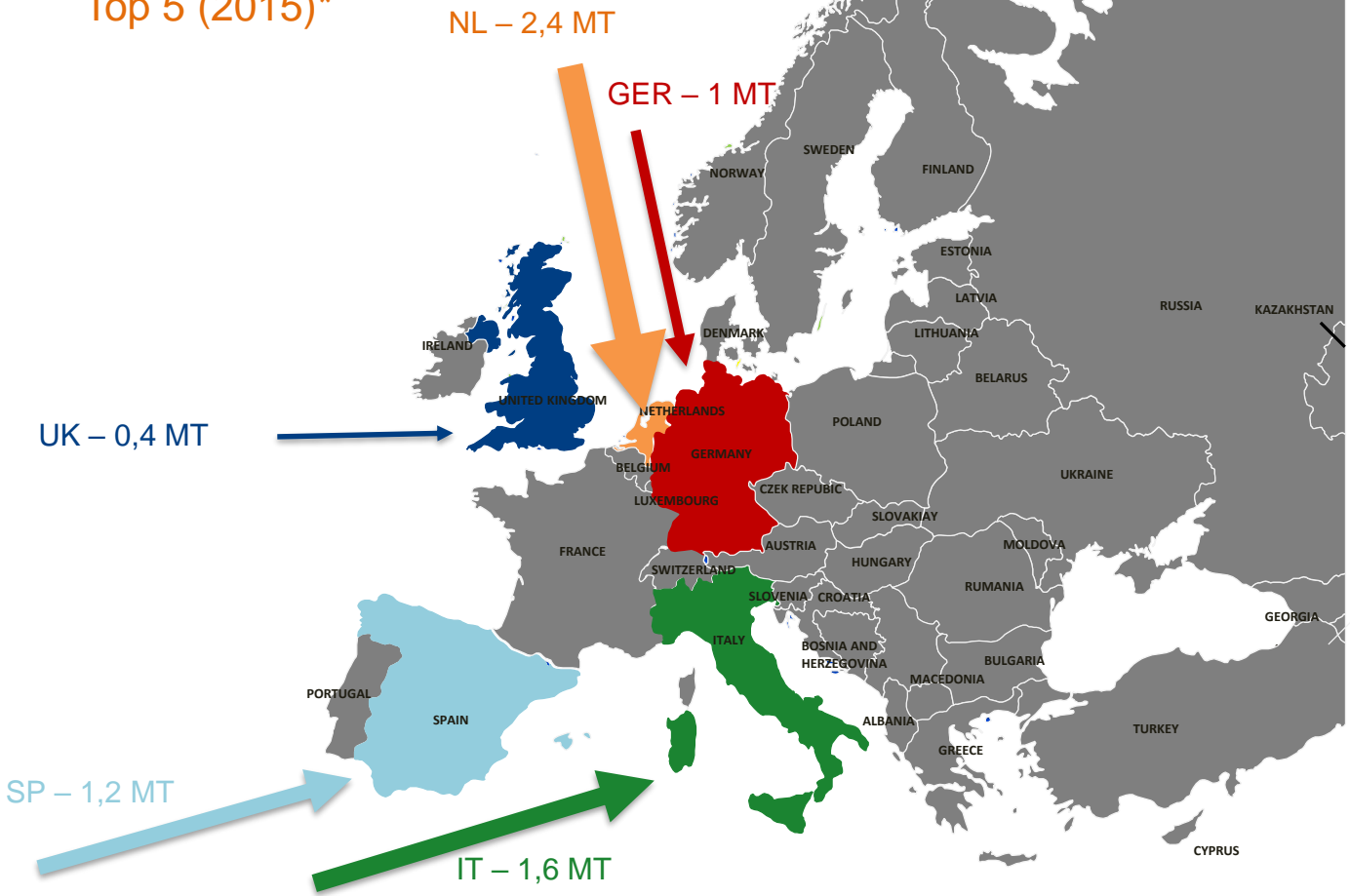


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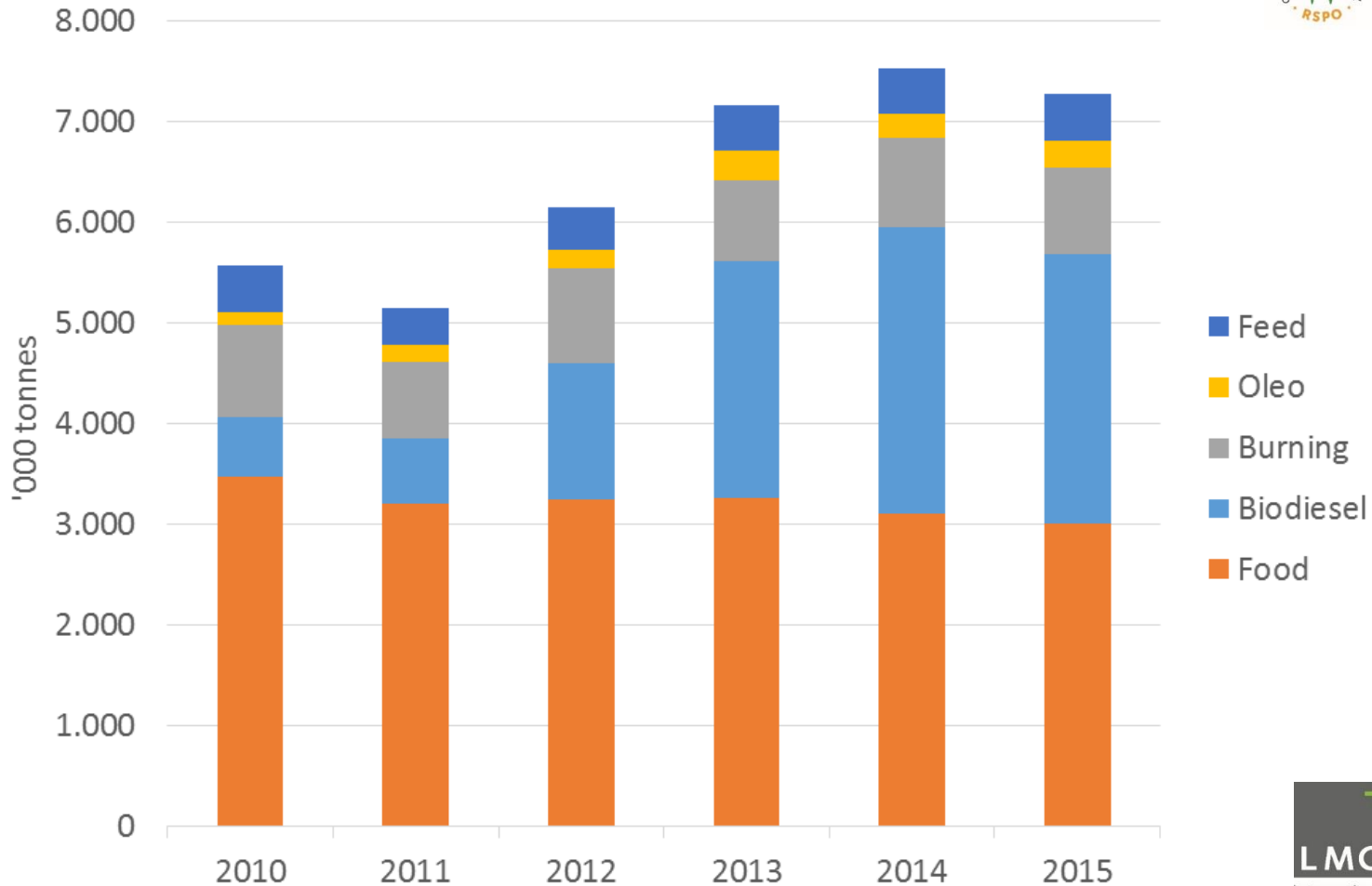
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# Palm oil imports Europe

Top 5 (2015)\*



# Estimated EU28 demand for palm oil



# EU Market

- Concerns around deforestation, forest fires, peatlands, and social issues
- NGO campaigns
- Pressure from banks and retailers
- Led to:
  - policies on sustainability, trademark use but also to attempts to tax palm oil, reduction of palm oil use, and no palm claims



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M&S

Waitrose

L'OCCITANE  
EN PROVENCE





Belgian Alliance for Sustainable Palm Oil  
Belgische Alliantie voor Duurzame Palmolie  
Alliance Belge pour une Huile de Palme Durable



**ALLIANCE FRANÇAISE**  
**POUR UNE HUILE**  
**DE PALME DURABLE**



**FORUM**  
Nachhaltiges Palmöl



**defra**  
Department for Environment  
Food and Rural Affairs



**TASK FORCE**  
**SUSTAINABLE**  
**PALM OIL**



LIVSMEDELSFÖRETAGEN  
The Swedish Food Association



**UNIONE ITALIANA**  
**OLIO DI PALMA**  
**SOSTENIBILE**

### NORWAY

100% CSPO Commitment = 2015  
Additional Targets = 2018

### DENMARK

100% CSPO Commitment = 2016  
Additional Targets = 2018

### BELGIUM

100% CSPO Commitment = 2015  
Additional Targets = 2020

### FRANCE

100% CSPO Commitment = 2015  
Additional Targets = 2020

### GERMANY / AUSTRIA / SWITZERLAND

100% CSPO Commitment = 2014  
Progress Reported  
Additional Targets = Various Dates

### UNITED KINGDOM

100% CSPO Commitment = 2015  
Progress Reported

### NETHERLANDS

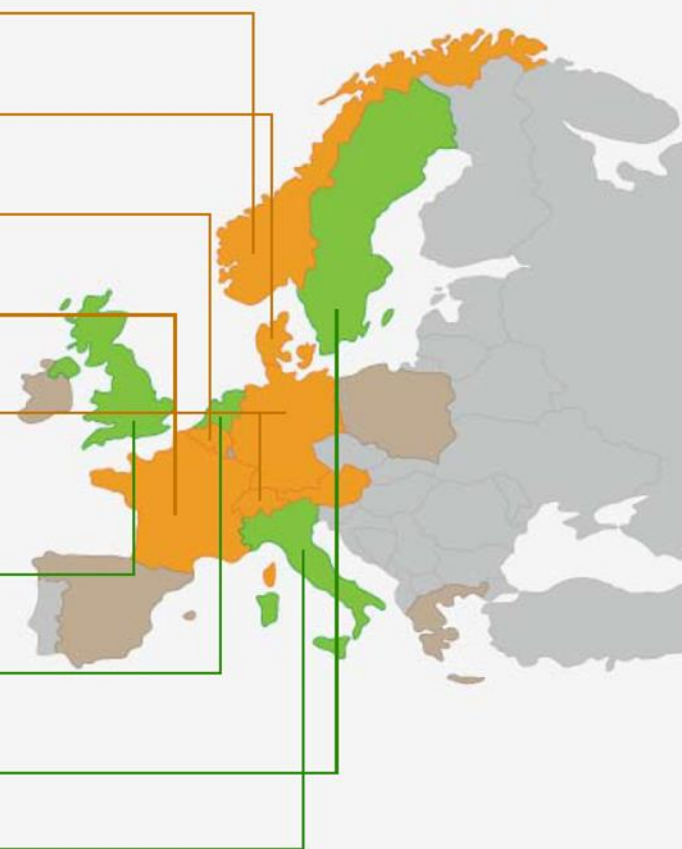
100% CSPO Commitment = 2015  
Progress Reported

### SWEDEN

100% CSPO Commitment = 2015

### ITALY

100% CSPO Commitment = 2020



● No CSPO Commitments

● Top 12 Country by Volume of Palm Oil Imports, but no CSPO Commitment

● 100% CSPO Commitments

● 100% CSPO & Additional Targets

# December 2015



## Commitment to Support 100% Sustainable Palm Oil in Europe

We declare to work together and support each other in transforming towards a 100% sustainable palm oil supply chain in Europe by 2020.

### The Amsterdam Palm Oil Declaration

by the following European governments:

Denmark  
France  
Germany  
The Netherlands  
United Kingdom

+ Norway



Italian Union for Sustainable Palm Oil



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# PALM OIL SUPPLY CHAIN

## PLANTATION

FRESH FRUIT BUNCH (FFB)



25kg



## MILL



90 tonnes FFB /hour

18 tonnes palm oil /hour

## COLLECTION PORT



200,000 tonnes



45,000 tonnes



## COLLECTION PORT



200,000 tonnes

## REFINERY

/FRACTIONATION PLANT



100 tonnes /hour

20% stearin

80% olein

## MARGARINE

MANUFACTURER



250gr margarine

100gr palm oil

## COOKIE

MANUFACTURER



250gr cookies

15gr palm oil

NOTE: Volumes in this infographic are averages. There is a lot of variation in processing, transport capacity, and ingredient use.

# Supply chain models

- **Book & Claim (B&C)**

RSPO credits sold by mills (PO), crushers (PKO, PKE), and independent smallholders

- **Mass Balance (MB)**

Mixing of sustainable and conventional palm oil is allowed if it is monitored administratively

- **Segregated (SG)**

Mixing of sustainable palm oil batches is allowed

- **Identity Preserved (IP)**

Sustainable palm oil kept apart and is traceable to the mill and its supply base



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# Changes in



- IT platform for physical trades between mills, traders and refiners
- Video on traceability function
- Credit trade will be included:
  - no GreenPalm certificates from January 2017
  - RSPO credits
  - UTZ as service provider
- RSPO PalmTrace



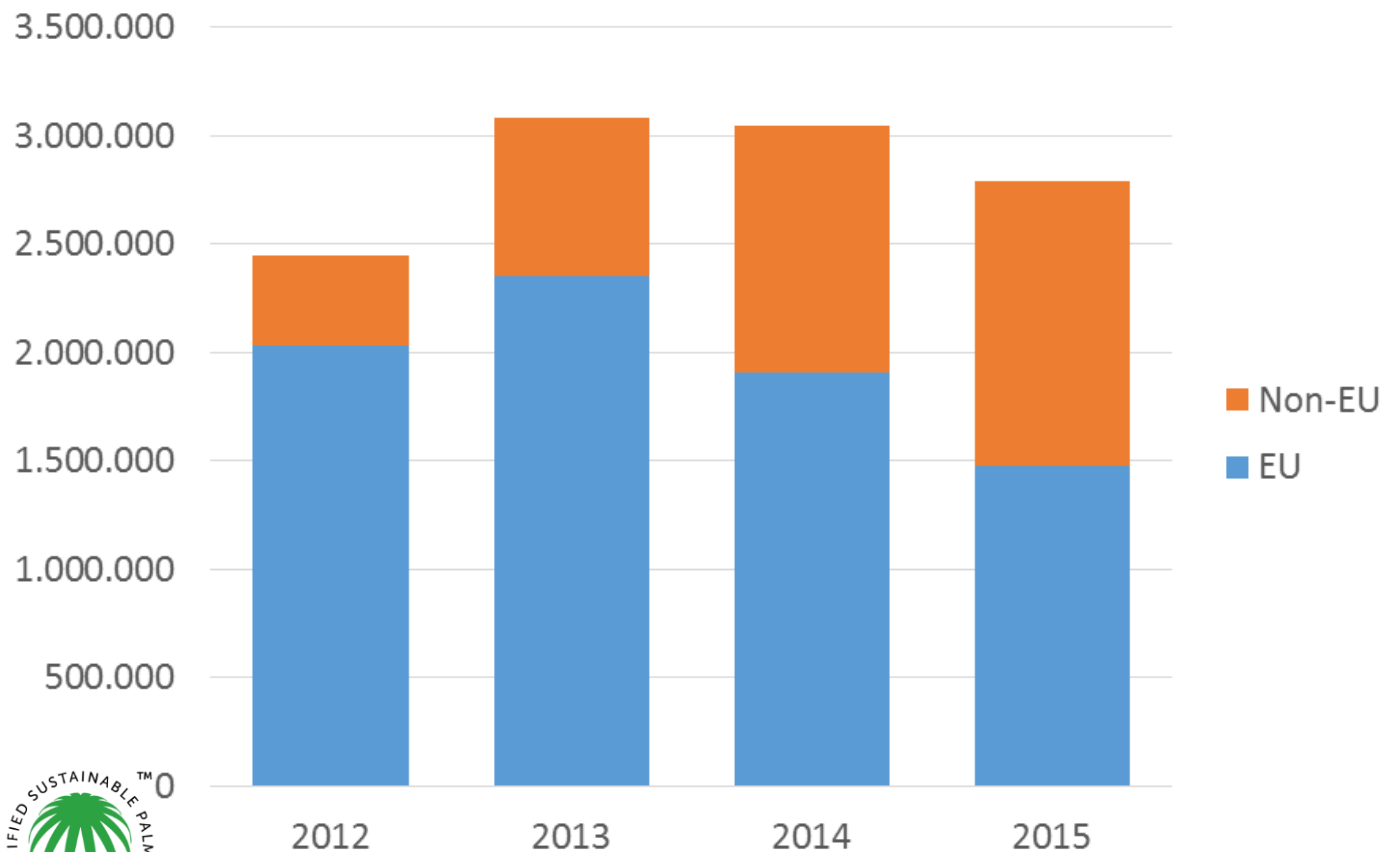
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# Changes in eTrace

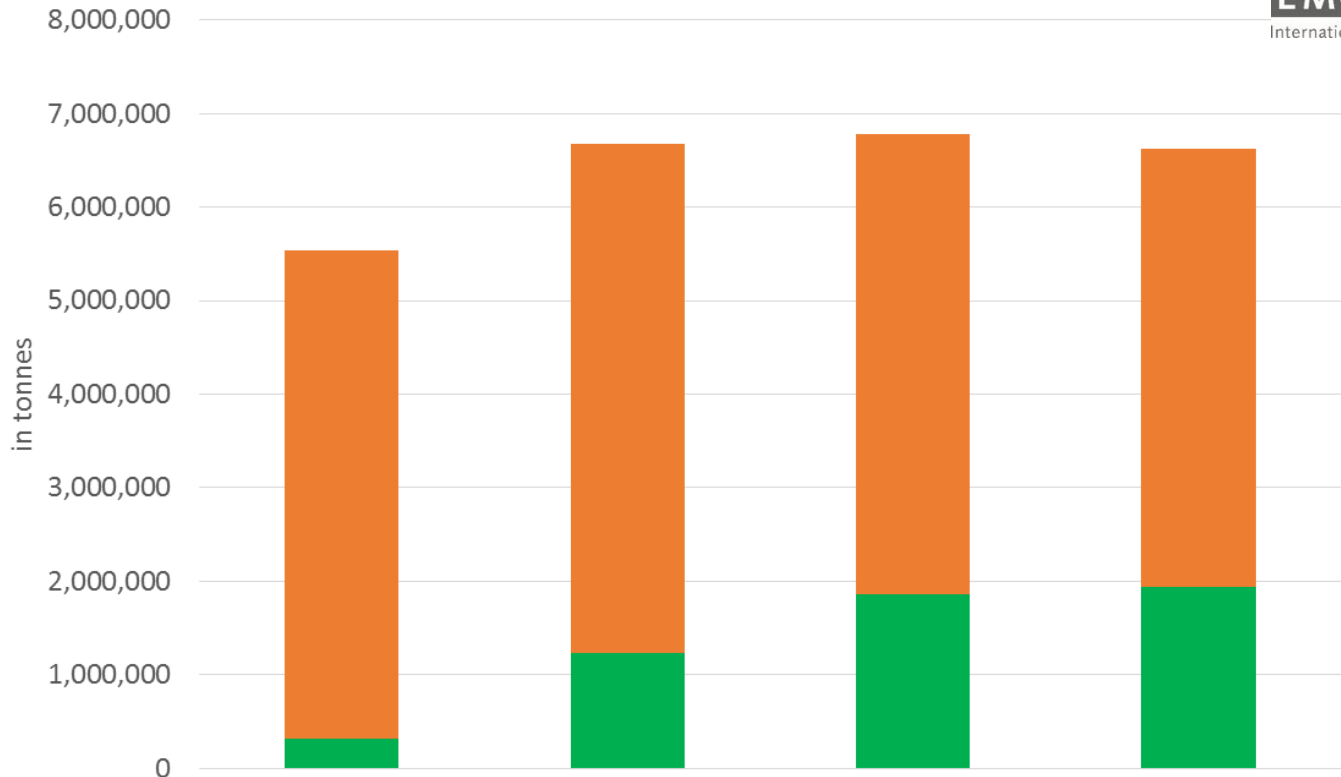


## Redeemed palm oil certificates





# Palm Oil Imports to Europe



■ Certified Palm Oil imports to Europe    ■ Conventional Palm Oil imports to Europe

## Certified Sustainable Palm Kernels (mt)



# Opportunities for Latin America

Production of certified sustainable palm (kernel) oil to:

- brands with global commitment
- markets with demand (EU, US)

Engage with local key influencers

- Nestle, Unilever, Walmart, Colgate, P&G
- Banks and investors

# THANK YOU

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[www.rspo.org](http://www.rspo.org)

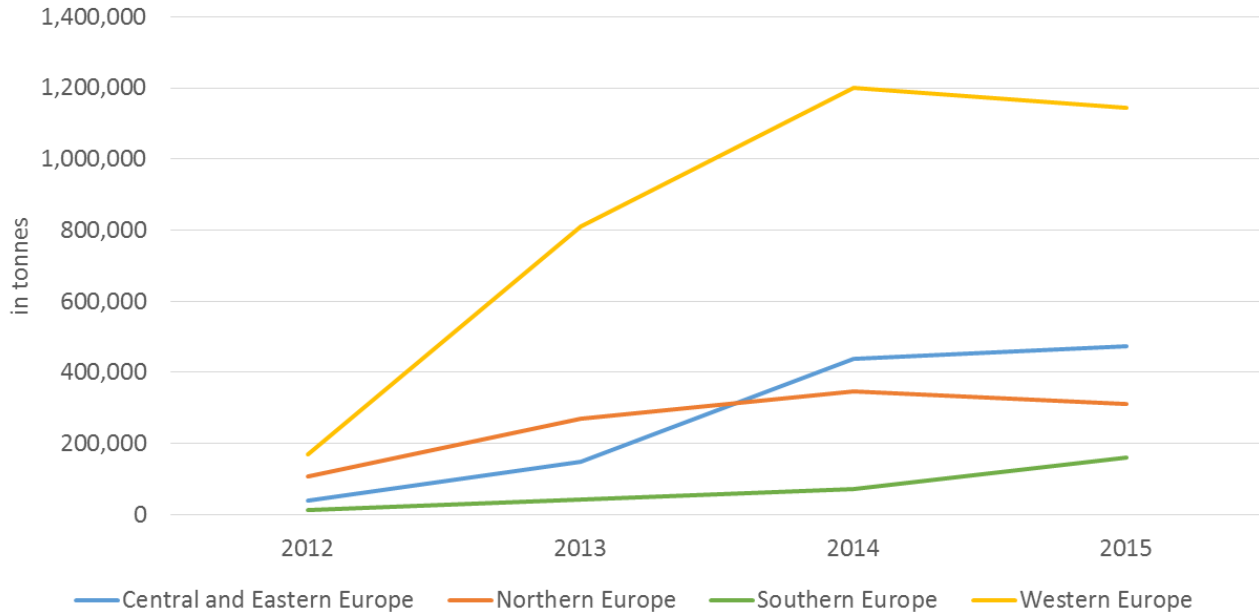


RSPO will transform markets  
to make sustainable palm oil  
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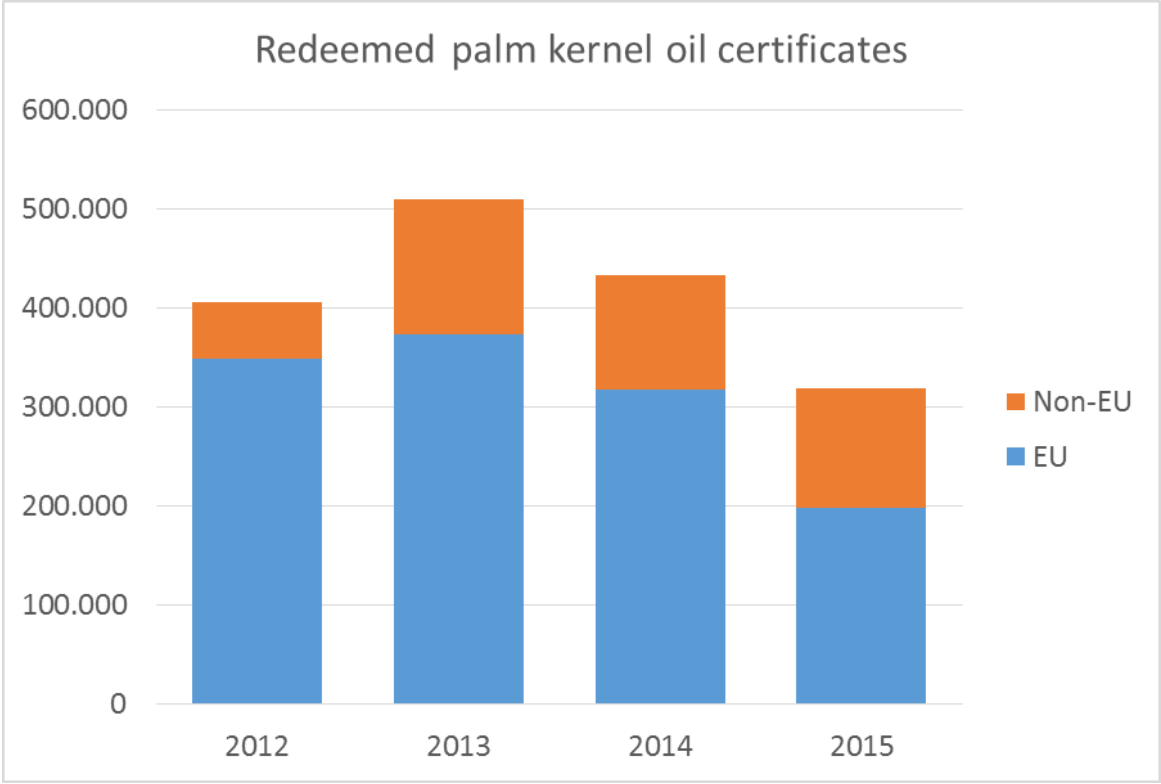
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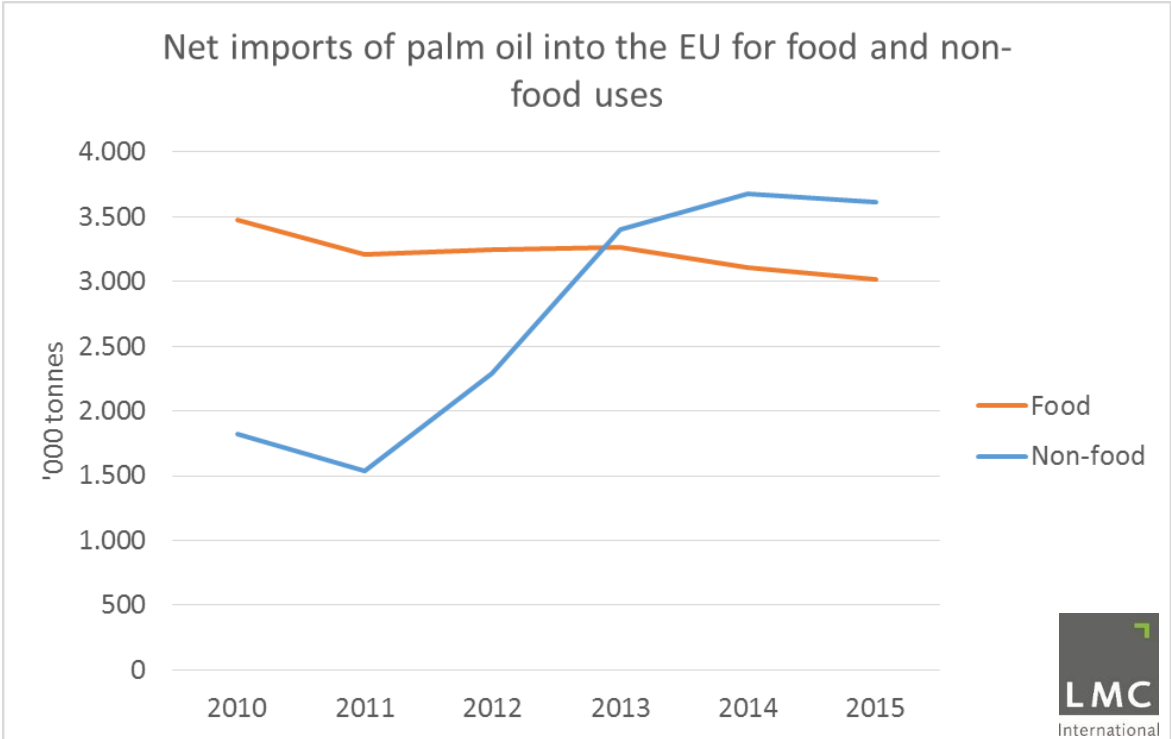
### Certified Palm Oil imports per region



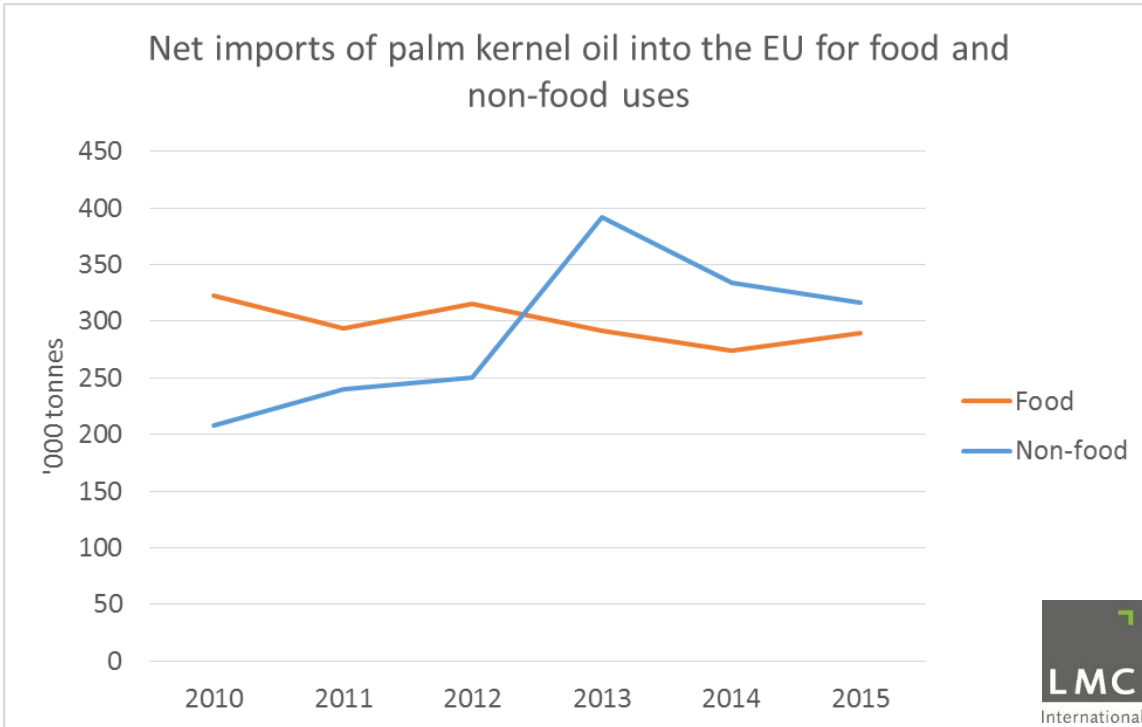
Source: RSPO



Source: GreenPalm



Source: Eurostat



Source: Eurostat