

Developments for Palm Oil in Global Market



American Palm Oil Council
US Regional Office for Malaysian Palm Oil Council (MPOC)

Presentation Outline

Global Oils & Fats Scenario

- Production, Exports & Consumption
- Consumption by Major Countries
- Oils and Fats Scenario in North America

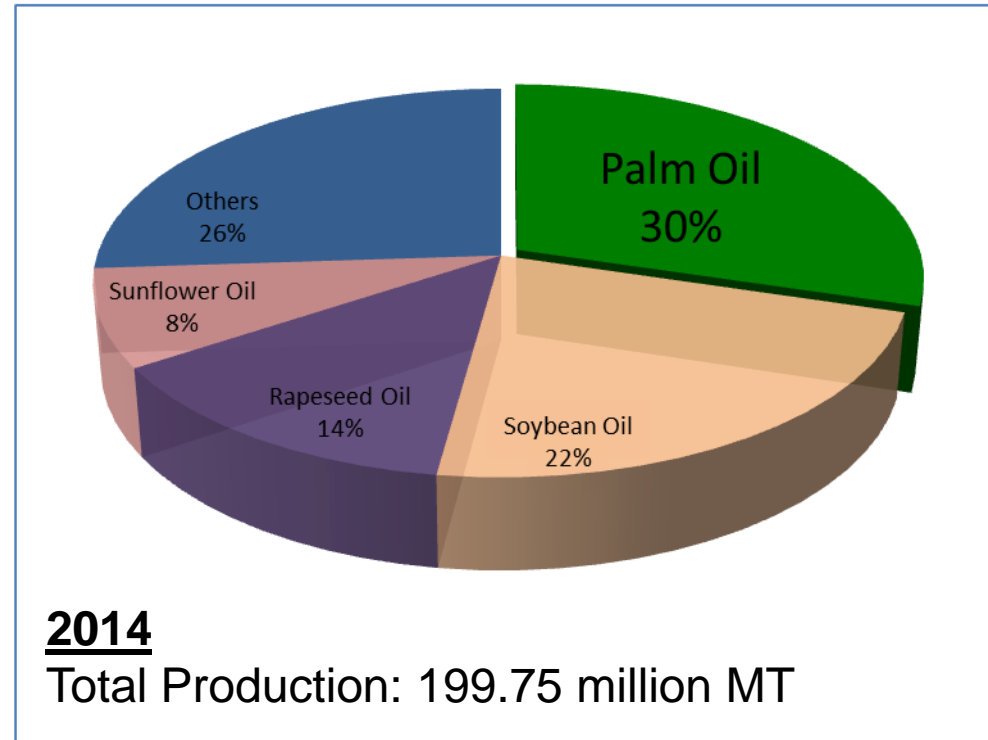
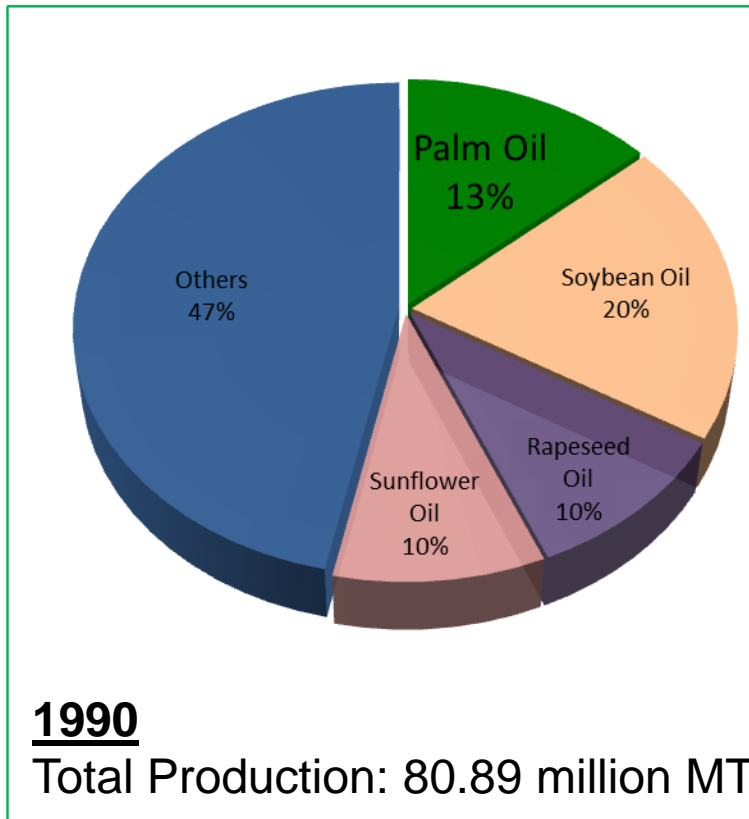
The Importance of Palm Oil in Global Market

- Palm Oil in the Global Market*
- Export of Malaysian Palm Oil*
- Top Importers of Malaysian Palm Oil*
- Area of Opportunities in Global Market*
- Conclusion*

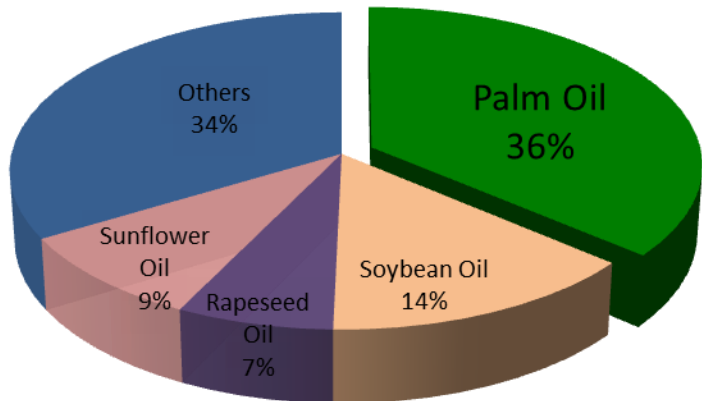
About Malaysian Palm Oil Council (MPOC)

Global Oils & Fats Scenario

Global Oils & Fats Production 1990 vs. 2014

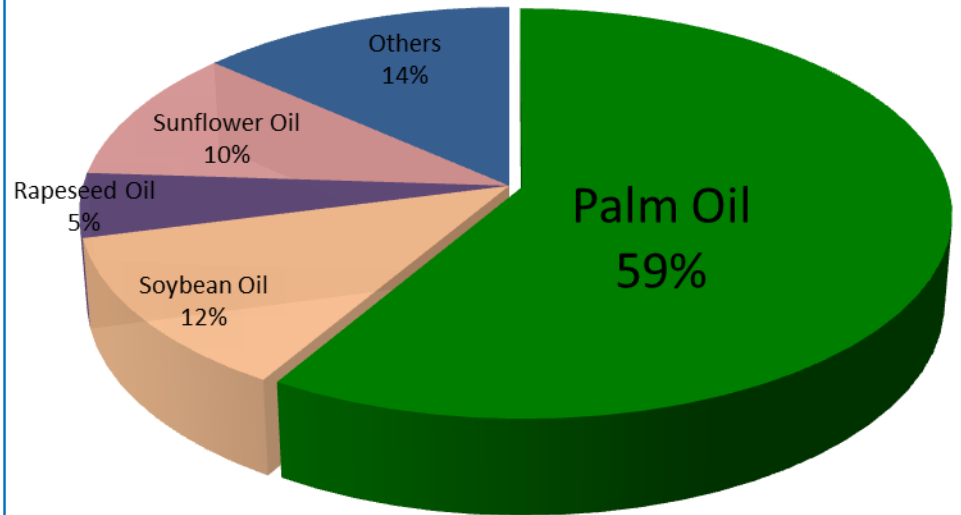


Global Oils & Fats Exports 1990 vs. 2014



1990

Total Exports: 23.27 million MT



2014

Total Exports: 78.58 million MT

Global Oils & Fats Consumption 1990 - 2014 (in million MT)

	1990	2000	2010	2014
Palm Oil	11.08	21.75	45.57	59.05
Soybean Oil	16.13	25.17	39.13	45.44
Rapeseed Oil	8.2	14.27	23.62	26.93
Sunflower Oil	7.89	9.47	12.8	15.89
Others	37.61	43.09	50.59	18.34
Total	80.91	113.75	171.71	165.65
Population (billion)	5.27	6.07	6.77	7.17
Gross World Production (US\$ trillion)	27.54	43.61	74.54	77.61

Oils & Fats Consumption by Major Countries (2014)

Country	Population (million)	Consumption (million MT)	Kg / year
China	1,394	30,150	21.63
EU-27	506	24,790	48.99
India	1,267	17,600	13.89
USA	323	13,040	40.37
Indonesia	253	10,450	41.30
Brazil	202	7,380	36.53
Pakistan	185	3,390	18.32
Argentina	40	3,420	85.50
Russia	142	3,560	25.07
Egypt	83	2,086	25.13

Overview of Oils and Fats in Canada, Mexico and USA

<i>Production</i>	2013	2014	<i>Imports</i>	2013	2014
Soybean Oil	10,001,000	10,021,000	Soybean Oil	318,000	304,000
Cotton Oil	386,000	283,000	Cotton Oil	80,000	45,000
Sunflower Oil	218,000	209,000	Sunflower Oil	78,000	94,000
Rapeseed Oil	4,010,000	4,425,000	Rapeseed Oil	1,435,000	1,752,000
Corn Oil	1,781,000	1,877,000	Corn Oil	49,000	32,000
Olive Oil	-	-	Olive Oil	343,000	371,000
Palm Oil	-	-	Palm Oil	1,834,000	1,637,000
Palm Kernel Oil	-	-	Palm Kernel Oil	362,000	338,000
Total	16,396,000	16,815,000	Total	4,499,000	4,573,000
<i>Export</i>	2013	2014	<i>Domestic Appearance</i>	2013	2014
Soybean Oil	923,000	995,000	Soybean Oil	9,867,000	9,633,000
Cotton Oil	94,000	67,000	Cotton Oil	275,000	209,000
Sunflower Oil	33,000	40,000	Sunflower Oil	264,000	268,000
Rapeseed Oil	2,474,000	2,464,000	Rapeseed Oil	3,013,000	3,562,000
Corn Oil	517,000	409,000	Corn Oil	1,325,000	1,475,000
Olive Oil	-	-	Olive Oil	303,000	306
Palm Oil	-	-	Palm Oil	1,800,000	1,677,000
Palm Kernel Oil	-	-	Palm Kernel Oil	267,000	260
Total	4,041,000	3,975,000	Total	17,114,000	16,824,566

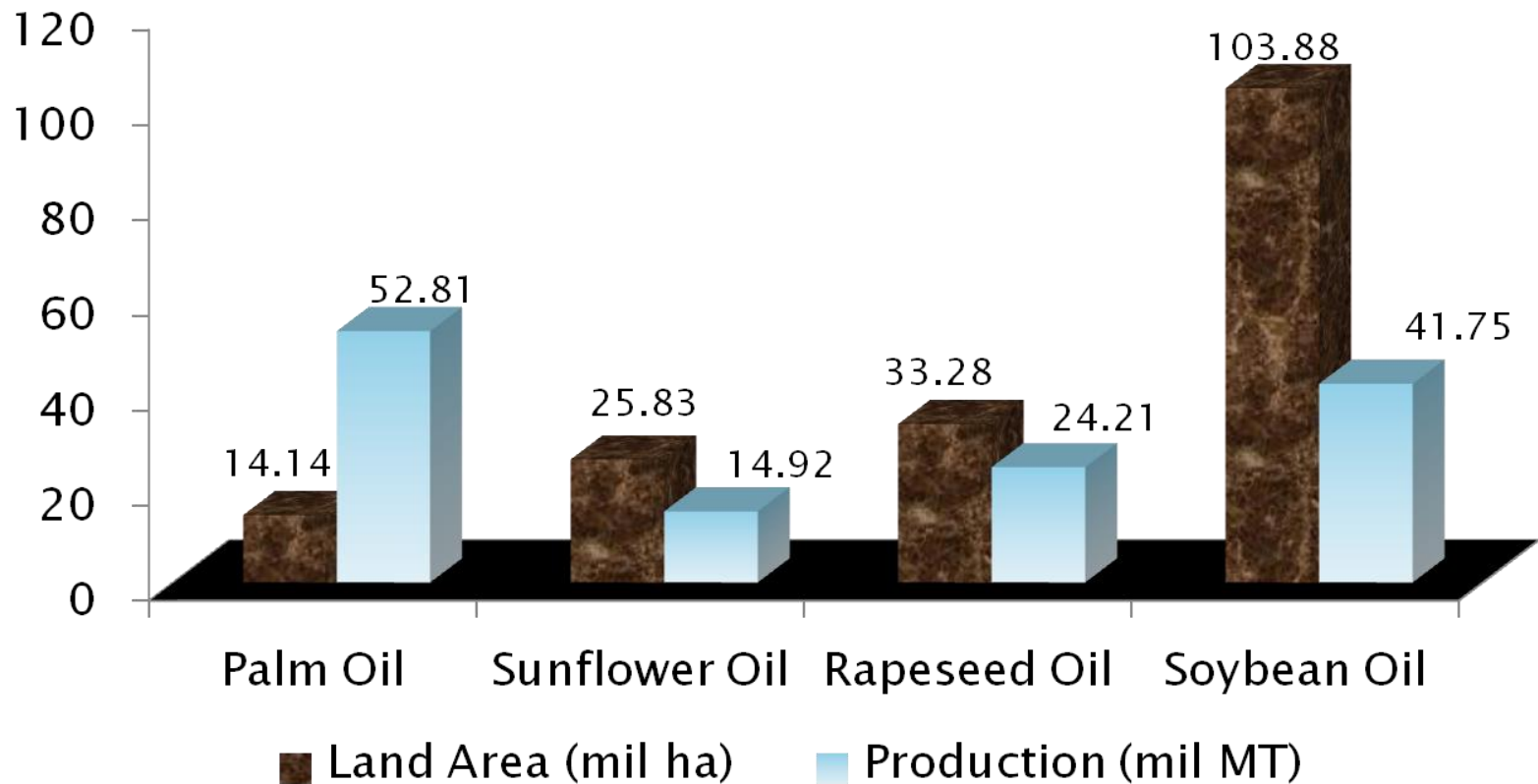
The Importance of Palm Oil in Global Market

Palm Oil in the Global Oils & Fats Market

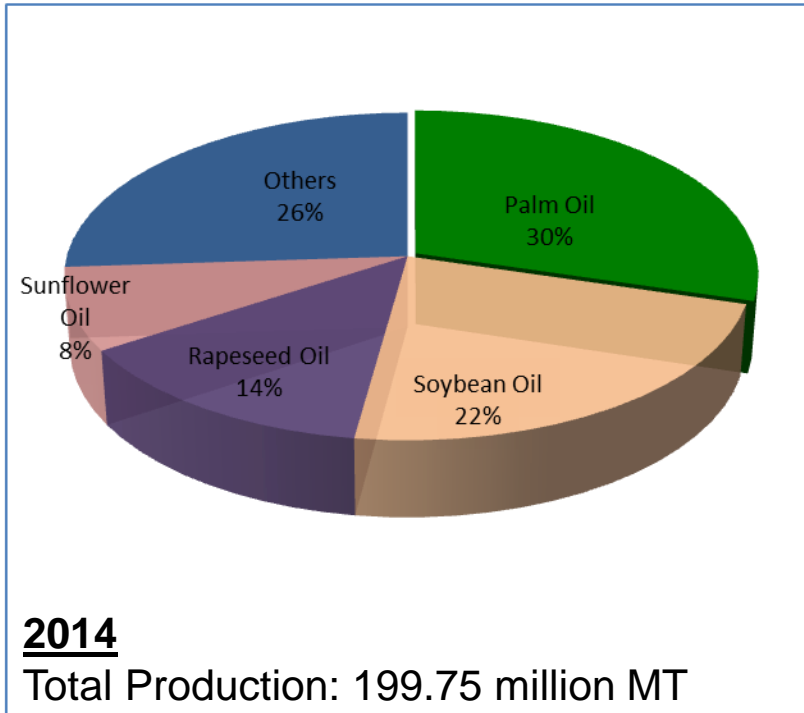
- Most productive oil crop
- Largest produced vegetable oil
- Most consumed oil
- Versatile – food & non food
- The most environment friendly agricultural crop

Most productive oil crop

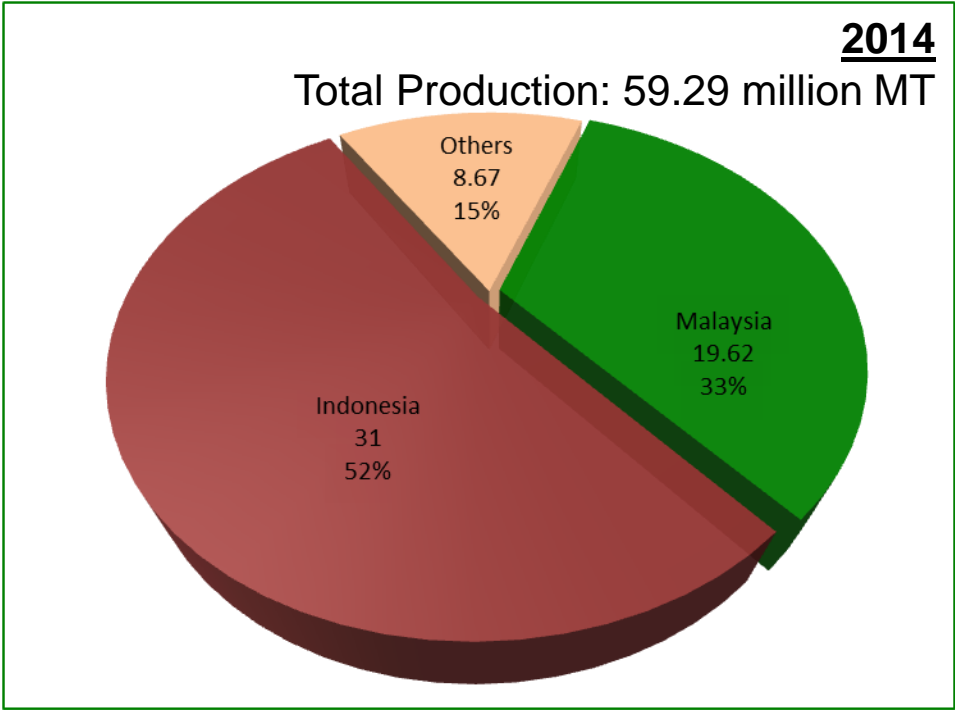
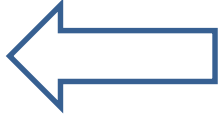
Oil palm is the most efficient, effective and highest yielding among all vegetable oils produced



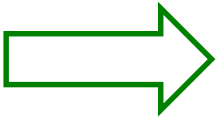
Largest produced vegetable oil



Global Production
of Oils & Fats

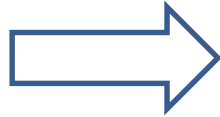


Global Production
of Palm Oil

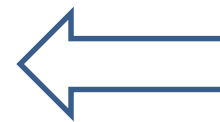
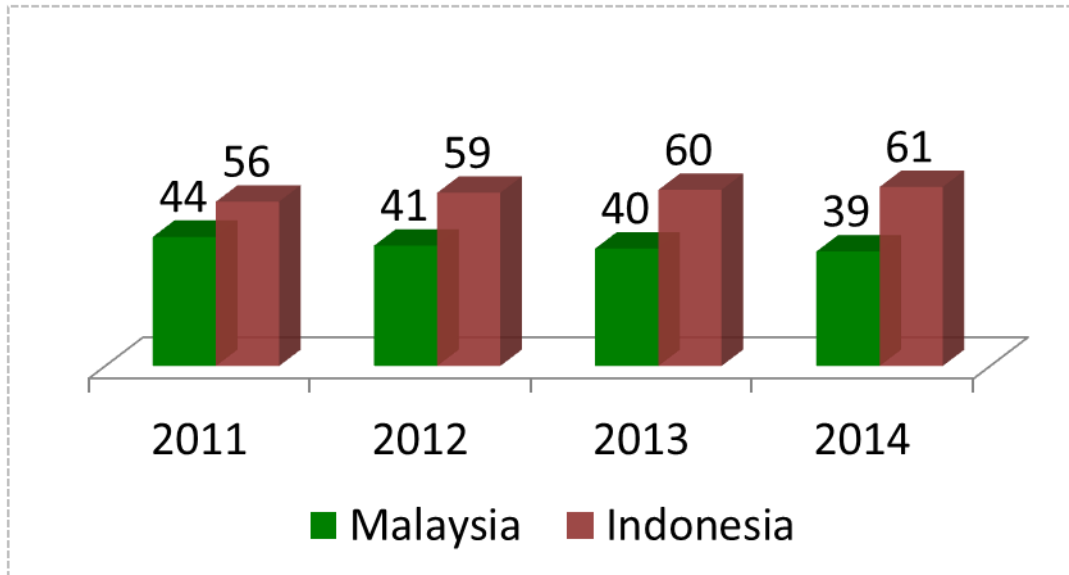


Palm Oil from Malaysia & Indonesia

Production
(MT)



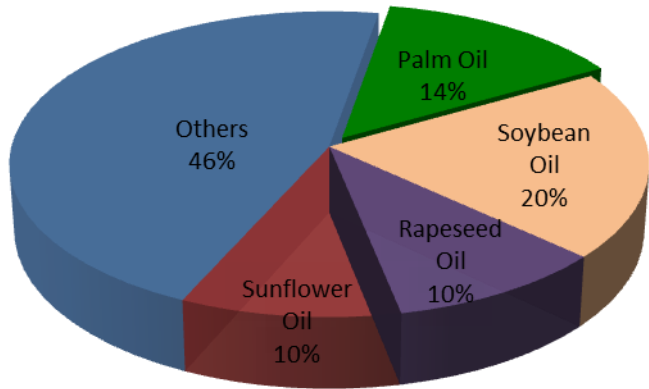
	2011	2012	2013	2014
Malaysia	18,912	18,785	19,216	19,500
Indonesia	24,300	26,900	28,300	30,100
Total	43,212	45,685	47,516	49,600



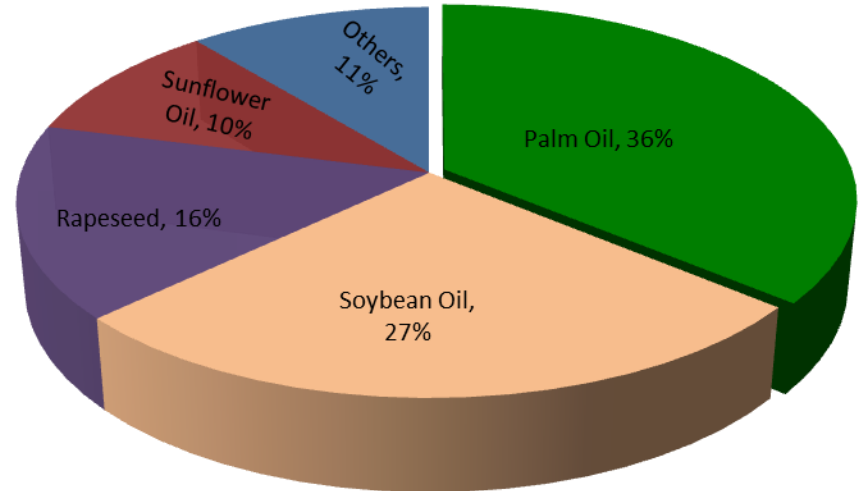
Production
(%)

Most consumed oil

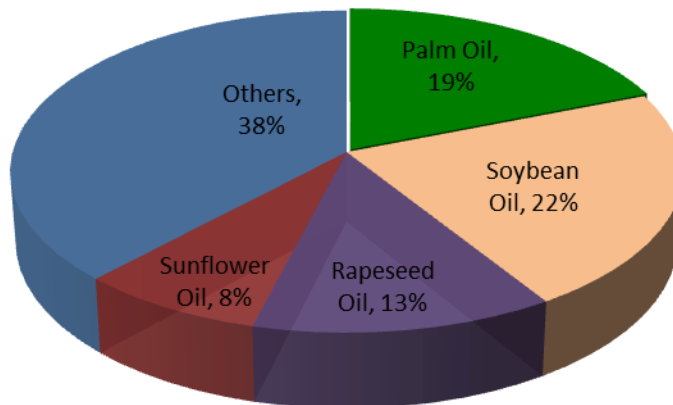
Consumption – Palm Oil vs. Other Oils



1990



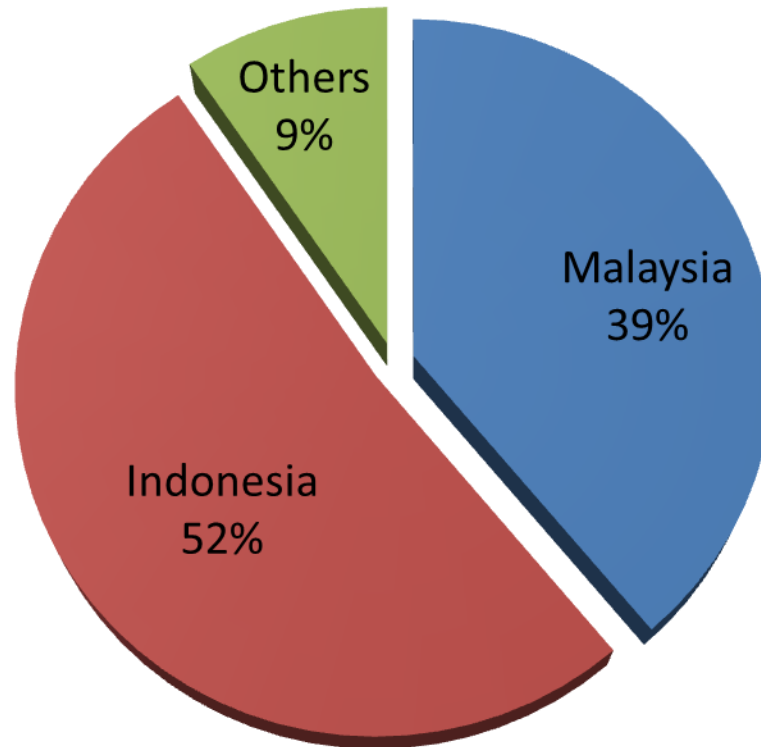
2014



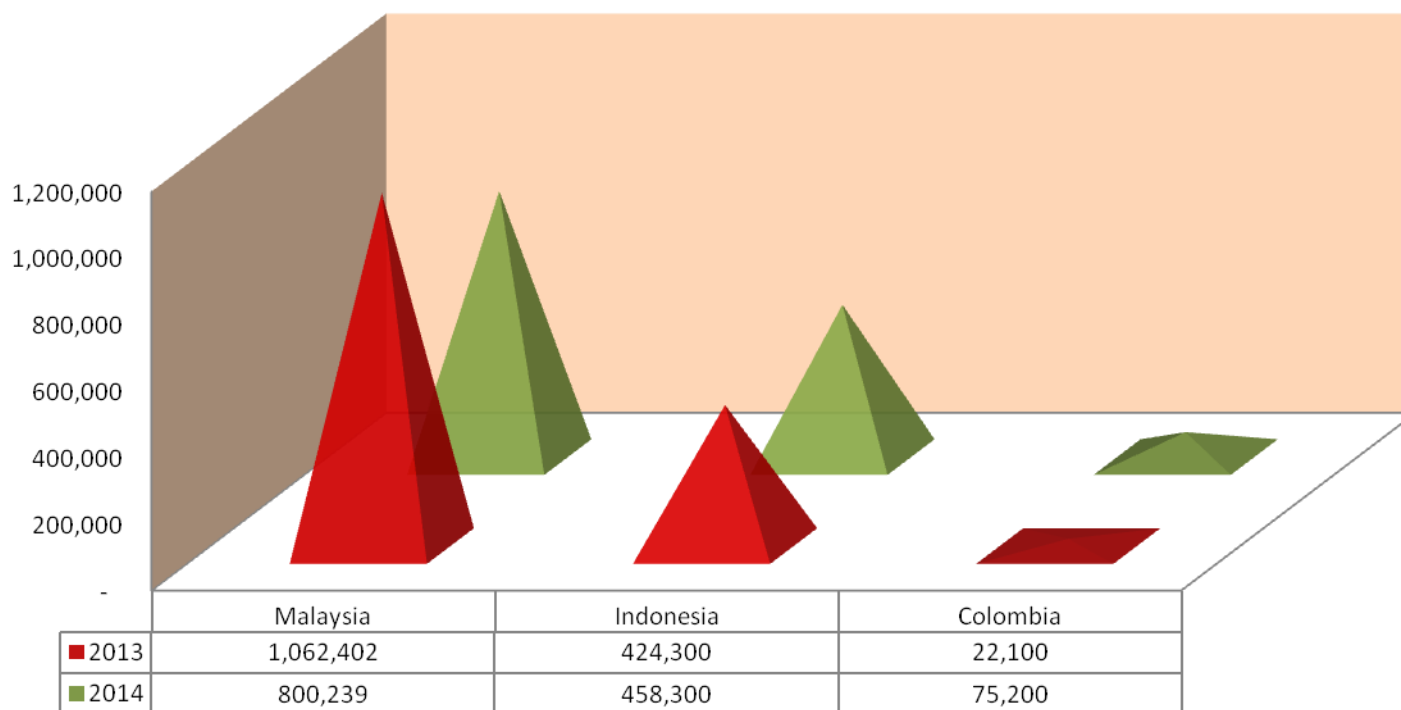
2000

World Exports of Palm Oil 2014 (in million MT)

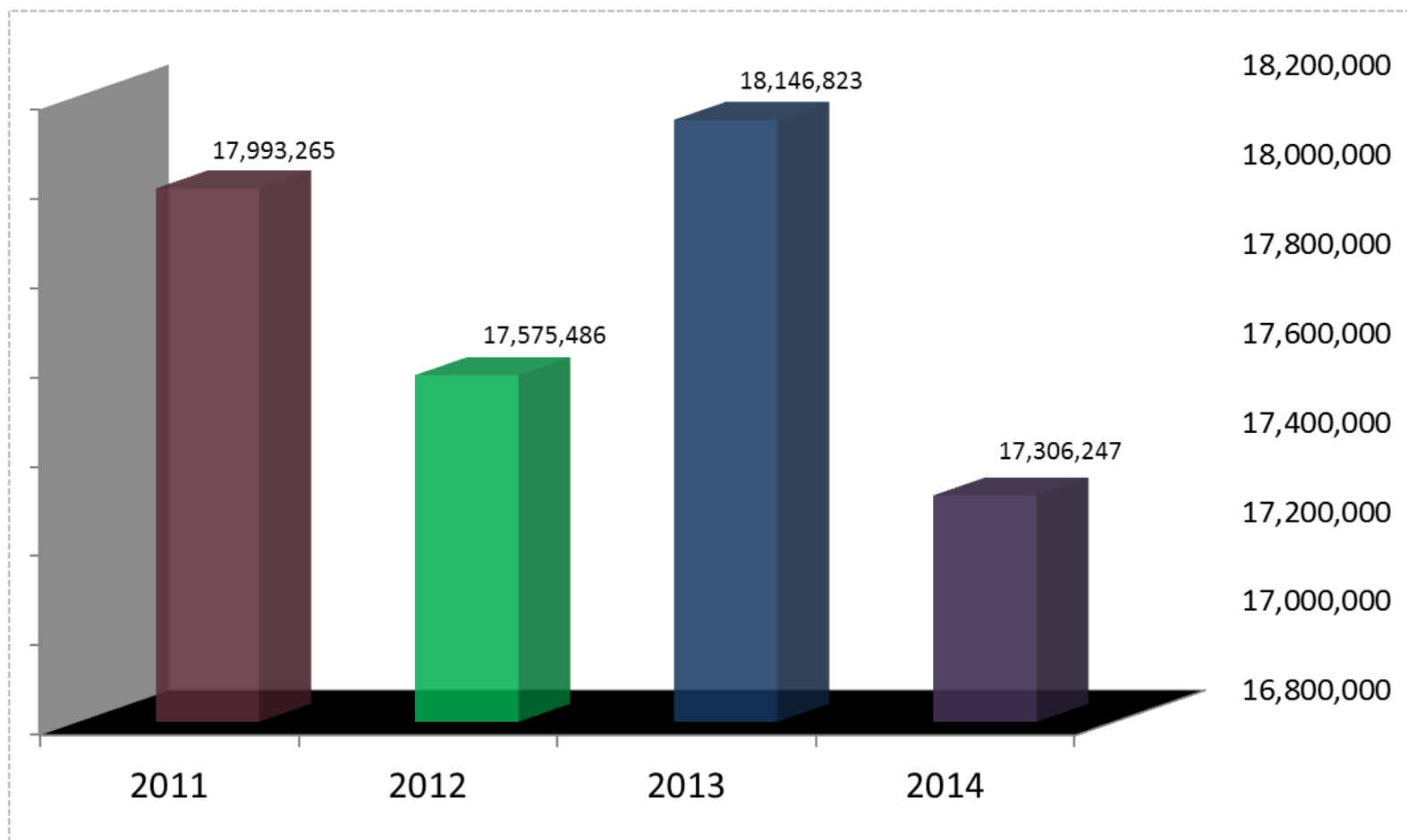
Total: 44.50 million MT



Import of Palm Oil from Major Producing Countries into Canada, Mexico and USA (in MT)



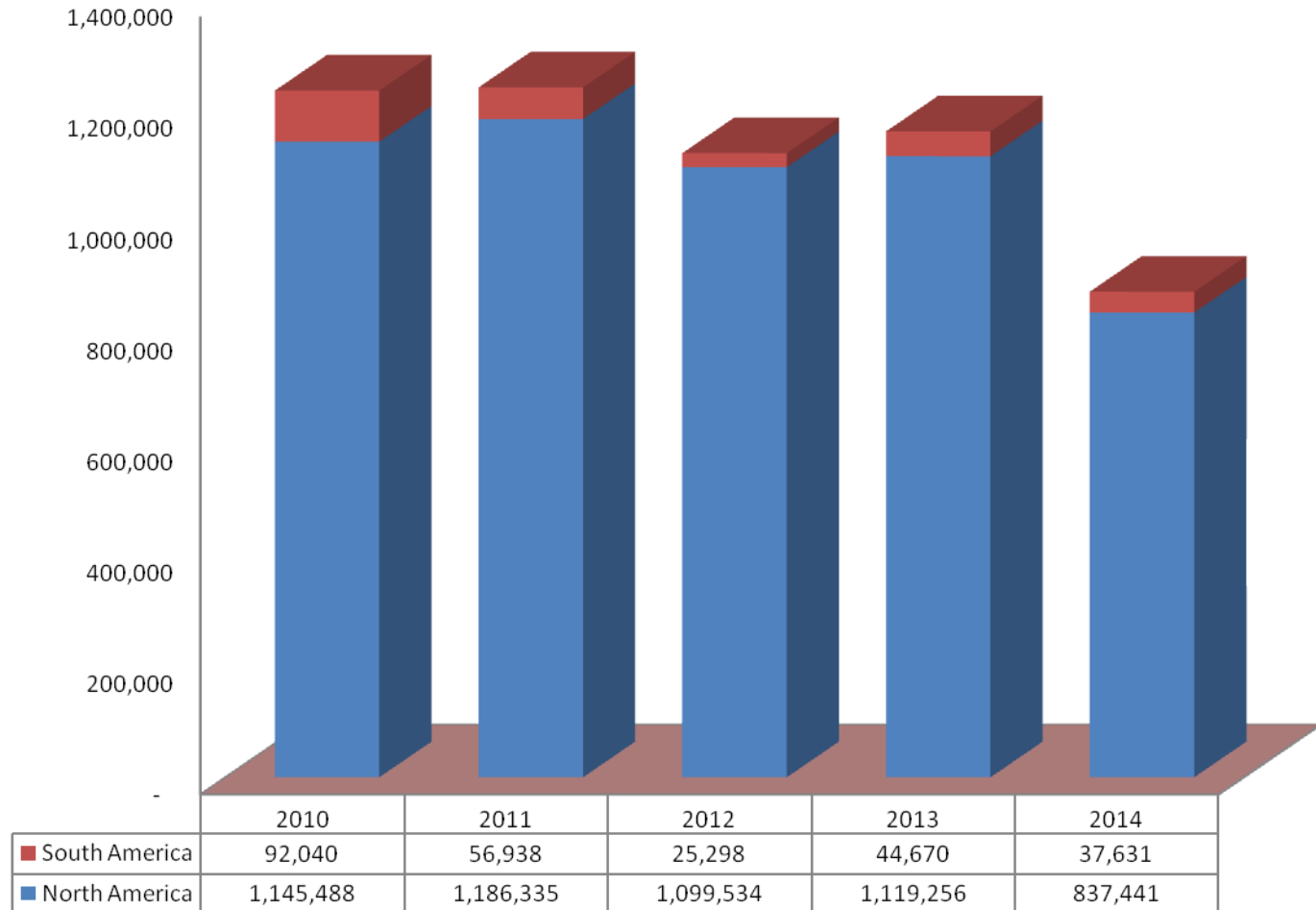
Exports of Malaysian Palm Oil 2011 – 2014 (in MT)



Source: MPOB



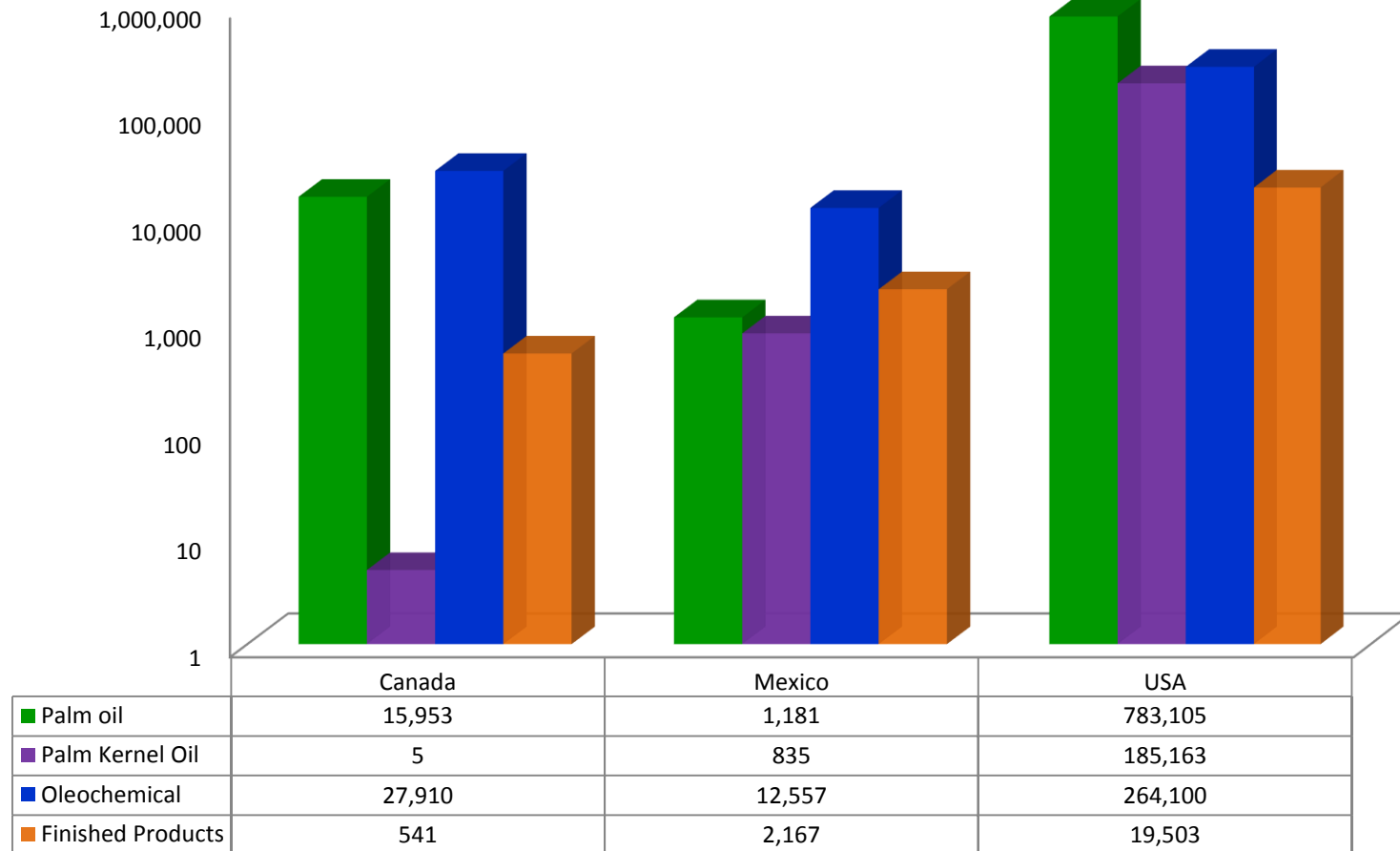
Total Export of Malaysian Palm Oil to the American Region (in MT)



Source: MPOB



2014 - Export of Malaysian Palm Products to Canada, Mexico and USA (in MT)



Source: MPOB



Top Importers of Malaysian Palm Oil (2014)

India
3,251,564 MT

China
2,839,283 MT

Netherlands
1,598,471 MT

Pakistan
815,618 MT

U.S.A
783,105 MT

Vietnam
604,193 MT

Japan
513,508 MT

Benin
456,254 MT

Iran
447,058 MT

Egypt
349,172 MT

Versatile – food & non-food

Areas of Opportunities for Malaysian Palm Oil in Global Arena

FOR FOOD APPLICATION

Cooking oil , Industrial Frying Fats, margarine, vegetable ghee, dairy product substitutes, non-dairy cheese analog and creamer, ice cream, specialty / confectionery fats, filled milk, salad dressing, pro Vitamin A and E etc.

FOR NON-FOOD APPLICATION

Personal Care Products, Fabric Softener, Powder & Liquid Detergent for Fabric Cleaning, Oil Palm Biomass, Renewable Energy etc.

The most environment friendly agricultural crop

- ❑ The only vegetable oil internationally recognized sustainable certification

System	Food	Biofuels
International	Roundtable on Sustainable Palm Oil (RSPO)	RSPO Red
	ISCC Plus	International Sustainability & Carbon Certification System (ISCC)
National (Malaysia)	Malaysian Sustainable Palm Oil (MSPO)	(an appendage to be added soon)
National (Indonesia)	Indonesian Sustainable Palm Oil (ISPO)	-

- ❑ Malaysian palm oil industry is still honouring Rio Summit Commitment
- ❑ Malaysian palm oil industry is dedicated to biodiversity

Malaysian Palm Oil Council (MPOC)

MISSION

To promote the market expansion of Malaysian palm oil and its products by enhancing the image of palm oil and creating better acceptance of palm oil through awareness of various technological and economic advantages (techno-economic advantages) and environmental sustainability.

OBJECTIVES

1. To **enhance trade opportunities in the market place** by identifying and meeting the latest opportunities in the market.
2. To **encourage product diversification** by using Malaysian palm oil as the key ingredient, thus gaining a prominent role in new and reformulated products.
3. To **improve understanding of palm oil**, enhancing its application and elucidating its numerous strengths and benefits.
4. To **uphold the good name of Malaysian palm oil** by closing the gap between the issues of perception, allegations and the realities of palm oil.
5. To **safeguard Malaysian palm oil as the most dominant vegetable oil** in terms of market coverage, nutritional benefits, environmental sustainability and commercial success.



MPOC - Regional Offices

1. **United States of America (Washington D.C.) – American Region (North, Central, South and Caribbean)**
2. Europe (Brussels) – Europe Region (except Russia)
3. South Africa (Durban) – African Region
4. Pakistan (Lahore) - Pakistan
5. India (Mumbai) - India
6. Bangladesh (Dhaka) - Bangladesh
7. P. R. China (Shanghai) - China
8. Turkey (Istanbul) – East Middle East Region
9. Egypt (Cairo) – West Middle East Region
10. Moscow (Moscow) – Russia

Event of the Year

Join Us in Los Angeles - Register Now!



GOFF

9

GLOBAL OILS & FATS FORUM

2015

ADVANCING SUSTAINABILITY & SUSTENANCE

**Don't Miss The Premier
Global Oils & Fats Event**

**Wed. & Thurs. October 14 & 15, 2015
The Sheraton Los Angeles Downtown**

Thank You

**1010 Wisconsin Ave NW Ste 307,
Washington DC 20007**

Tel: 202.333.0661 / 0662

Fax: 202.333.0331

Email: haznita@americanpalmoil.com

haznita@mpoc.org.my

kartik.kumar@americanpalmoil.com

