EU MARKET SURVEY 2002

ANIMAL AND VEGETABLE OILS AND FATS FOR INDUSTRIAL APPLICATION

CENTRE FOR THE PROMOTION OF IMPORTS FROM DEVELOPING COUNTRIES

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ANIMAL AND VEGETABLE OILS AND FATS FOR INDUSTRIAL APPLICATION

Compiled for CBI by:

Ceres Company
International marketing
of food and agricultural products

in collaboration with
C. J. M. Meershoek

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REPORT SUMMARY

This EU market survey profiles the EU market for animal and vegetable oils and fats for industrial application. The emphasis of the survey lies on vegetable oils and fats, as these are of importance to developing country suppliers. The major national markets within the EU for vegetable oils and fats are Germany, The Netherlands, France, Italy and the United Kingdom. These countries will be highlighted.
The survey includes contact details of importers, trade associations, and other relevant organisations. Furthermore, statistical market information on production, imports and exports and information on trade structure, prices and margins is provided.

As an exporter, you need this information in order to formulate your own market and product strategies.
To assist you with this, CBI has developed a matching EU Strategic Marketing Guide “Animal and vegetable oils and fats for industrial application”. It offers a practical handbook for exporters engaged, or wishing to engage, in exporting animal and vegetable oils and fats to the European Union. It aims to facilitate exporters in formulating their own markets and product strategies, through the provision of practical information and a methodology of analysis and ready-to-fill-in frameworks.

As mentioned above, statistical market information on production and trade, and information on trade structure, prices and margins, which is required for the ready-to-fill-in frameworks, can be found in this EU Market Survey.

Market research
This EU Market Survey and the EU Strategic Marketing Guide serve as a basis for further market research: after you have read this survey and then filled in the frameworks in the strategic marketing guide, it is important to further research your target markets, sales channels and potential customers.

Market research depends on secondary data (data that have been compiled and published earlier) and primary data (information that you collect yourself).
An example of secondary data is this EU Market Survey. Primary data are needed when secondary data fall short of your needs, for example when researching your specific type of consumer about the acceptance of your specific product. Sources of information are, among others, (statistical) databanks, newspapers and magazines, market reports, (annual) reports from branch associations, but also shops in target countries, products or catalogues from your competitors, and conversations with suppliers, specialists, colleagues and even competitors. After you have received/collected your information, you should analyse it. In order to judge the attractiveness of the market, sales channel or customer, you should use/develop a classification or score system.

For more detailed information on market research, reference is made to CBI’s Export Planner (2000).

In this survey, the following products are covered:

- The 9 most important vegetable oils and fats: soybean oil, palm oil, rapeseed oil, sunflower oil, groundnut oil, coconut fat, palm kernel fat, olive oil and other oils and fats (castor oil, cottonseed oil, corn oil, linseed oil and sesame oil)
- The main animal oils and fats: lard, tallow and fish oil.

Emphasis in this survey is placed on vegetable oils and fats, as the EU is a large importer of these products, especially palm oil, coconut oil, palm kernel oil and groundnut oil from developing countries.
As the EU is largely self sufficient in lard and tallow and imports negligible quantities from developing countries, these products are only covered briefly.
Butter oil is excluded from this survey, as the EU is the world largest exporter of butter oil.

Consumption
No consumption figures are available regarding the industrial use of animal and vegetable oils and fats in the EU. Animal and vegetable oils and fats are used as ingredients in a wide variety of products for human consumption (margarine, salad dressings, confectionery, cooking oil, mayonnaise), animal consumption (compound feed), non-food products (cosmetics, detergents, soap, candles) and industrial products (paints, varnishes, resins, plastics, inks, dust suppressants).
Thanks to technical progress in the processing of vegetable oils, many products are interchangeable and complementary. This allows processors a flexible use of different oils and fats in their end products, based on prices, availability and product characteristics.

Due to increasing consumer demand for healthy and safe products in the EU, consumption of vegetable oil based food has been growing, to the detriment of animal oils and fat based products.

Trends
The major trends in the trade of animal and vegetable oils and fats in the EU can be summarized as follows:
- Increasing concentration in the distribution structure. Large processors in the EU have direct contracts

with suppliers in developing countries, thereby reducing the role of middlemen like brokers and traders. Presently, four crushers/refiners in the EU are responsible for 75% of the market.
- Growing concern about food safety in the EU makes a system of integrated chain control necessary. Tracing and tracking of oils and fats to their origins are increasingly used by food processors, to improve control over ingredients they use in their food products.
- Technical progress in the production of vegetable oils and fats makes different types increasingly interchangeable and allows processors flexibility in the application of different vegetable oils and fats in their end products.
- Although still a very small segment, organic oils and fats is a growing market. EU consumers increasingly look for organic products, as these are considered pure, healthy and safe.

Production
At a global level, production of the 16 most important animal and vegetable oils and fats reached a level of 108 million tons in 2000. This was an increase of 4.7% compared to 1999.
Vegetable oils and fats were by far the largest product group in 2000, accounting for 85% of total global production. Animal oils and fats accounted for 14% and fish oils for only 2%.
EU production of vegetable oils and fats increased in 2000 by 151,000 tons to 11.2 million tons, an increase of 1.4%.
The share of the EU in the world production of vegetable oils and fats in 2000 was 12.1%.

Germany remains the largest producer of vegetable oils and fats (25%), followed by Spain (16%), France (12%), The Netherlands (10%) and United Kingdom (7%). Together they account for 70% of total EU production.

EU production of animal fats in 2000 amounted to 2,483 tons and accounted for 17% of global production. Fish oil produced in the EU in 2000 amounted to only 189 tons, 13% of total global production. Peru remained the largest producer of fish oil, producing 593 tons (42% share of total global production).

Imports

EU imports of the 9 most important vegetable oils and fats
EU imports accounted for 7.4 million tons in 2000, an increase of 5% compared to 1999. They represent a value of US$ 4.3 billion, a decrease of 11% compared to 1999. Developing countries supplied 3.5 million tons with a value of US$ 1.7 billion in 2000. This represents an import share of 47% in volume and 39% in value.

EU imports of animal fats (lard and tallow) and fish oil
EU imports of animal fats in 2000 amounted to US$ 207 million and 695,000 tons, a decrease of 16% and 12% respectively compared to 1999. Imports from developing countries amounted to only US$ 1.8 million and 7,000 tons in 2000.
EU imports of fish oil amounted to US$ 120 million and 277,000 tons in 2000, a decrease of 6% in value compared to 1999 and an increase of 0.5% in volume.

Exports

EU exports of the 9 most important vegetable oils and fats (x1000 tons)
With only 2,195 tons, the EU accounted for 7% of total world exports in 2000. Soybean oil was by far the largest exported product and accounted for 1,060 tons (48%), followed by rapeseed oil: 461 tons (21%) and olive oil: 328 tons (15%).
These three products accounted for 84% of total EU exports in 2000.

EU exports of animal fats and fish oil
Exports from the EU were negligible at only 93,000 tons. The USA remained the largest exporter and accounted for almost 50% of total exports of animal fats.

Peru remained the largest exporter for fish oil with 461,000 tons (55%), followed by Norway with 108,000 tons (13%). The EU exported only 58,000 tons.

Trade structure
Shippers of crude and refined oils and fats, brokers, traders and processors of crude and refined products form the trade structure in the oils and fats sector. Processors of large quantities of imported oils and fats source increasingly on a direct basis from shippers in developing countries. Due to this trend, the number of brokers and traders decreases each year.
Utilisation of the distribution partners depends on the type of product a developing country wants to export. Major products like palm oil, coconut oil and palm kernel oil are often supplied directly to the processing industry, while smaller, more specialised products like sesame oil are supplied through brokers and traders. Brokers form a major source of information on supply and demand, price levels and market outlook.
The Federation of Oils and Fats Associations (FOSFA) is a contracting organisation of the parties involved in the distribution of oils and fats. FOSFA contracts govern the trade in animal and vegetable oils and fats in the EU.

Opportunities for exporters in developing countries
Opportunities for exporters in developing countries as discussed in Chapter 9 lie in the following fields:
- Organic oils and fats
- Specialised vegetable oils and fats for niche markets (castor oil, shea butter, sweet almond oil)
- Main products: palm oil, coconut oil and palm kernel oil
- Integrated chain control
- HACCP and ISO certification
- Logistics

CBI services
The EU Strategic Marketing Guide “Animal and vegetable oils and fats for industrial application” provides exporters in developing countries with practical information on entering the EU market. The guide describes requirements for access in the EU, terms of trade, trade promotion and marketing guidelines. Other interesting market surveys and marketing guides for exporters of vegetable oils and fats include ‘Essential oils and oleoresins’ and ‘Natural ingredients for cosmetics’.

For information on CBI programmes, training and seminars and for downloading market information and CBI News Bulletins, please go to the Internet site www.cbi.nl

1 PRODUCT CHARACTERISTICS

Industrial processors use vegetable and animal oils and fats as an ingredient for end products for human consumption, animal consumption, non-food products and various industrial applications.
This survey refers to the application of animal oils and fats for industrial uses only. Oils and fats of non-biological origin are excluded from the survey.

1.1 Product groups

Vegetable oils and fats
Oil seeds are mainly processed, by crushing or solvent extraction, into vegetable oil. Groundnuts form the major exception. The kernels are mainly used in snacks and confectionary, while the remainder is used as bird feed and for processing into peanut butter.
Vegetable oils and fats constitute about 80% of total edible oils and fats production. They form major constituents of the food chain. Performance and use of vegetable oils is determined by the fatty-acid composition.

Soybean oil
Soybean oil dominates the world trade in vegetable oils. This is due to favourable agronomic characteristics, reasonable returns to farmers and processors, the high quality edible oil and a plentiful and dependable supply of crop at competitive prices. The oil content in the bean is low: 17-19%.
Soybean oil is used as an ingredient for many food items (shortenings, mayonnaise, salad dressing, margarine, cooking oil) and industrial products (paints, varnishes, resins, plastics, inks).
Depending on the end product, all the major oils can be used as a substitute for soybean oil.

Palm oil
Palm oil is the second largest source of vegetable oil in the world. It is the third most widely traded oil after soybean and rapeseed oil. Palm oil is the largest perennial crop. It is used in many food items like margarine, ice cream, confectionery, filled milk and as cocoa-butter substitute. Due to its characteristics, palm oil is often blended with other oils in colder countries. The principal trading centres are Kuala Lumpur, Rotterdam and London. The palm oil trade to the EU is governed by FOSFA trading rules and contracts (FOSFA 80 for crude, unbleached palm oil in bulk CIF, and FOSFA 81 for palm oil products in bulk CIF).

Rapeseed oil
Rapeseed oil is the third largest source of edible oil after soybean oil and palm oil and the second most widely traded oil in the world. It has a low saturated fat content of 6.8% and is primarily used as cooking oil and as an ingredient in shortenings and margarine.
Rapeseed oil is widely produced in EU countries like France, Germany, UK, Belgium and The Netherlands and is heavily subsidised.
Trade contracts and specifications are governed by FOSFA.

Sunflower oil
Sunflower oil is the fourth largest source of vegetable oil. The increasing output is due to plant agronomic characteristics and an increasing demand for polyunsaturated oils. The high digestibility and high vitamin E content makes it popular oil in the health food sectors. Sunflower oil is mainly used in the following food products: margarine, salad oil and cooking oil, as it does not affect the natural flavours of foods cooked in it.
Sunflower oil is widely produced in EU countries like France, Spain, Germany, Italy and The Netherlands.

Groundnut oil (peanut oil)
The smallest of the five leading annual oil-seed crops, groundnut oil is an important vegetable fat source in large producing and consuming countries (China, India). Due to the high domestic consumption, only 10% of groundnut oil is traded internationally. Refined groundnut oil is an excellent product for deep-frying and pan-frying and can be re-used many times over. The cosmetic industry uses groundnut oil in face and shaving creams and hair lotions. Lower quality and crude oils are used in soaps and detergents.

Coconut oil
Coconut oil is the second perennial crop after palm oil and a vital product for the economies of more than 100 countries.
Apart from being a major foreign exchange earner, coconut oil supplies an important dietary component for human consumption. 80% of production takes place in Asia and the Pacific region. Coconut oil is subject to increasing competition from palm kernel oil, its closest substitute. It has a high content of saturated fatty acids. The EU is an important producer and exporter of coconut oil produced from imported copra.

Palm kernel oil
Similar to coconut oil, palm kernel oil has a relatively small production. It is used as an ingredient in non-food (personal care products, detergents) and as a lauric oil in confectionery, bakery products and imitation dairy products. FOSFA 29 and 29A govern the trading rules and contracts in EU countries. Palm kernel oil has a high content of saturated fatty acids.

1.1.2 Animal oils and fats

Tallow

Tallow is a hard fat, derived from cattle. The USA, EU, China and Australia are the largest producers and exporters of tallow. Production in the EU amounted to 1 million tons in 2000, all for local use.
Imports in the EU amounted to only 258,000 tons, mainly by inter-EU sourcing.

Lard

Lard is derived from pigs. China, the EU, the USA and GOS countries (former Soviet Union) are the largest producers of lard.
The EU is self -sufficient in lard production, as virtually no imports and exports take place

Fish oil

Fish oil is derived mainly from herring, anchovy, sardines and prat. The oil is obtained by heating fish and fish bones. Fish oil has a high content of unsaturated fatty acids.

1.2 Customs/statistical product classification

On January 1, 1988, a unified coding system was introduced to harmonise the trading classification systems used worldwide. This system is called the Harmonised Commodity Description System (HS) and was developed by the World Customs Organisation (WCO). The system comprises about 5,000 commodity groups. Each is identified by a six-digit code, arranged in a legal and logical structure and is supported by well-defined rules to achieve uniform classification. More than 177 countries and economies use the system as a basis for their Customs tariffs and for the collection of international trade statistics. WCO is currently introducing alterations to the HS and these will be included in the combined nomenclature as of January 1, 2002. After the six-digit code, countries are free to use further subheadings. An 8-digit system is used in the trade data of Eurostat. Most codes, however, end with two zeros, i.e. effectively only using 6 digits. In some countries even 10 digits are sometimes used.

Table 1.1 gives the four-digit list of the main HS codes for animal and vegetable oils and fats.
A detailed list of HS codes and corresponding product names and descriptions can be found in Appendix 1 of this survey.

The HS codes 0209 and 1501-1506 refer to animal fats; the HS codes 1507-1521 refer to vegetable oils. HS code 1522 refers both to animal fats and vegetable oils.

Table 1.1 HS code classification of animal and vegetable oils and fats

HS codes	Products
0209	Pig & poultry fat, chilled, frozen
1501	Lard; other pig fat and poultry fat, rendered
1502	Fats of bovine, sheep or goats, raw or rendered
1503	Lard stearin, lard oil, oleostearin, oleo-oil & tallow oil, not emulsified
1504	Fats, oils & their fractions of fish & marine mammals, not chemically modified
1505	Wool grease & fatty substances
1506	Other animal fats, oil & their fractions, not chemically modified
1507	Soybean oil & its fractions, not chemically modified
1508	Peanut oil & its fractions, not chemically modified
1509	Olive oil & its fractions, not chemically modified
1510	Other oils from olives, not chemically modified
1511	Palm oil & its fractions, not chemically modified
1512	Sunflower-seed, safflower or cottonseed oil, not chemically modified
1513	Coconut, palm kernel or babassu oil, not chemically modified
1514	Rapeseed, colza or mustard oil, not chemically modified
1515	Other fixed vegetable fats & oils, not chemically modified jojoba, linseed, corn, castor, sesame oil
1516	Animal or vegetable fats & oils, hydrogenated, inter-esterified
1517	Margarine; edible mixtures or preparations of animal or vegetable fat
1518	Animal or vegetable fats & oils chemically modified; inedible mixture
1519	Industrial mono carboxylic fatty acids; acid oils from refining
1520	Glycerol crude; glycerol water
1521	Vegetable waxes
1522	Degras; residues from fatty substances or animal or vegetable waxes

2 INTRODUCTION TO THE EU MARKET

The European Union (EU) is the current name for the former European Community. Since 1 January 1995, the EU has consisted of 15 member states. Negotiations are in progress with a number of candidate member states, many of which already have extensive trade and cooperation agreements with the EU. It is envisaged that five of these countries will become members in 2004.

According to the first demographic estimates for 2000, published on January 8, 2001 by Eurostat, the population of the EU on 1 January 2001 was expected to total 377.6 million. While the pace of population growth in the EU has slowed greatly in the last 30 years, the increase of 0.3 percent in 2000 was slightly higher than the figure in recent years. Total GDP in 2000 equalled US$ 7,830.9 billion at current prices, while the average GDP per capita (at current exchange rates) amounted to US$ 22,588 in 1999 (OECD, 2001).

The most important aspect of the process of unification (of the former EC countries), which affects trade, is the harmonisation of rules in the EU countries. As the unification allows free movement of capital, goods, services and people, the internal borders have been removed. Goods produced or imported into one member state can be moved around between the other member states without restrictions. A precondition for this free movement is uniformity in the rules and regulations concerning locally produced or imported products. Although the European Union is already a fact, the regulations have not yet all been harmonised. Work is in progress on uniform regulations in the fields of environmental pollution, health, safety, quality and education.

On 1 January 1999, the Euro (€) became the legal currency within eleven EU member states: Austria, Belgium, Finland, France, Germany, Italy, Ireland, Luxembourg, The Netherlands, Spain, and Portugal. Their national currencies are now subdivisions of the euro and will continue to circulate as legal tender until 2002. Circulation of euro coins and banknotes will begin on 1 January 2002 and these will gradually replace national currency notes and coins, which must be withdrawn by 1 July 2002.

The most recent Eurostat trade statistics quoted in this survey are from the year 2000. In 1998 and 1999, the European Currency Unit (ECU) was still used as a monetary instrument by financial institutions to simplify financial procedures. On 1 January 1999, statistical and contractual values in ECU were converted into euros on a 1:1 exchange rate.
The Euro (€) / US$ exchange rate currently (October 2001) stands at around US$ 0.90 for one Euro.

The US$ is the basic currency unit used to indicate value in this market survey. The Eurostat trade statistics are based on the Euro (€) values and transferred into US$ with the exchange rates indicated below.

Exchange rates of EU currencies in US$

Country	Currency	1996	1997	1998	1999	2000	October 2001
European Union	ECU	1.25	1.13	1.12	-	-	-
	€	-	-	-	1.06	0.92	0.91
Austria	Ash	0.094	0.082	0.081	0.077	0.067	0.066
Belgium/Luxemb.	Bfr	0.032	0.028	0.028	0.026	0.023	0.023
Denmark	Dkr	0.17	0.15	0.15	0.13	0.12	0.12
Finland	FM	0.22	0.19	0.19	0.18	0.16	0.15
France	Ffr	0.20	0.17	0.17	0.16	0.14	0.14
Germany	DM	0.66	0.58	0.57	0.54	0.47	0.47
Greece	GRD	0.0041	0.0036	0.0034	0.0033	0.0027	0.0027
Ireland	I£	1.60	1.52	1.42	1.35	1.17	1.16
Italy	L	0.00065	0.00059	0.00058	0.00055	0.00048	0.00047
Netherlands	NLG	0.59	0.51	0.51	0.48	0.42	0.40
Portugal	Esc	0.0065	0.0057	0.0056	0.0053	0.0046	0.0045
Spain	Ptas	0.0079	0.0068	0.0067	0.0064	0.0055	0.0055
Sweden	Skr	0.15	0.13	0.13	0.12	0.11	0.10
United Kingdom	GB£	1.56	1.64	1.66	1.62	1.51	1.47

Source: CBS Statline (October 2001)

Trade figures quoted in this survey must be interpreted and used with extreme caution. The collection of data regarding trade flows has become more difficult since the establishment of the single market on 1 January 1993. Until that date, trade was registered by means of compulsory Customs procedures at border crossings, but, since the removal of the intra-EU borders, this is no longer the case. Statistical bodies like Eurostat cannot now depend on the automatic generation of trade figures. In the case of intra-EU trade, statistical reporting is only compulsory for exporting and importing firms whose trade exceeds a certain annual value. The threshold varies considerably from country to country, but it is typically about Euro (€) 100,000. As a consequence, although figures for trade between the EU and the rest of the world are accurately represented, trade within the EU is generally underestimated.

This survey focuses on the five major EU markets for animal and vegetable oils and fats. They are Germany, United Kingdom, France, Italy and The Netherlands. These EU member countries will be highlighted, because of their relative importance in terms of consumption, production, imports and exports. Germany, United Kingdom, France and Italy constitute the biggest consumer and industrial markets in the EU. The Netherlands plays a major role in the import, distribution and processing of vegetable oils and fats: its main port Rotterdam is the major trading port in the EU for imports, storage and distribution in the EU.

3 CONSUMPTION

3.1 Market size

No consumption figures are available for the product groups under review as they are supplied to processors in the food, non-food and industrial sectors. They use animal and vegetable oils and fats as ingredients for a whole variety of food and non-food products, compound feed and industrial applications.
To illustrate this, deliveries in The Netherlands to the processing industry (food, compound feed and industrial) show the following figures for 2000 (x 1,000 tons):

	Human consumption	Compound feed	Industrial
Volume	684	488	178
In %	50	40	10

To give an example of the market size for some of the most important consumer products containing oil and/or fat in The Netherlands, we quote the following picture:

Table 3.1 Sales of end products containing oils/fats, The Netherlands, 1998 – 2000 (x 1,000 tons)

	1998	1999	2000
Total	292	288	296
Of which:			
- Margarine	112	108	105
- Halvarine (< 41% fat)	48	49	48
- Mixtures and others	110	109	120
- Table oils (salad oil)	22	22	23

Source: Commodity Board MVO, Statistical Yearbook 2000

Per capita consumption of oils and fats (products) in The Netherlands declined during the last four years, as shown by the following table for some of the most important products. It concerns the consumption of margarine and halvarine products, baking, cooking and frying oils and fats, salad oil, mayonnaise and oils and fats used in products like cookies, candies, bakery products, chips, etc.

Products which originally contain oils, like meat and nuts, are not included in the table.

Table 3.2 Consumption of end products containing oils/fats, 1997 – 2000 (kg/per capita)

	2000	1999	1998	1997
Margarine products	6.6	6.8	7.2	7.2
Halvarine products	3.0	3.1	3.1	3.1
Mixtures, preparations				
(households + industrial)	27.1	25.9	25.6	25.7

Sources: Commodity Board MVO, Statistical yearbook 2000; Dairy Commodity Board, 2001

3.1.1 Animal fat and fish oil

Animal fat and fish oil are primarily used in products for animal consumption and secondly as ingredients for products for human consumption.
The application of animal fats as edible oils is only 20% of total edible oil production and the trend is declining. Demand for vegetable edible oils and fats have grown, due to changing consumer attitudes.

Table 3.3 Sales of animal (mixed) fats and fish oil, The Netherlands, 1998 – 2000 (x 1,000 tonnes)

	1998	1999	2000
Total	501	539	502
Of which			
- Human consumption	21	27	26
- Compound feed	410	434	405
- Technical	70	78	71

Source: Commodity Board MVO, Statistical Yearbook 2000

Sales for use in the food industry remained stable, although less lard and more fish oil was sold.
The decline in compound feed concerned mainly tallow and mixes.

3.1.2 Vegetable oils and fats

Vegetable oils and fats are mainly used as an edible oil ingredient to produce a wide variety of food products. Human consumption of vegetable oils underwent strong growth throughout the EU over recent years.
Olive oil, groundnut oil and sunflower oil remain the most consumed products in the food sector.

Due to its pleasant taste, low-fat content and vitamin content, sunflower oil is used more and more in catering too. The EU is the largest producer of olive oil, which is entirely used for human consumption. It is a popular product in Italy, Spain, Portugal, Greece and France and increasingly in northern EU countries as well.

The following table indicates applications of the different vegetable oils and fats products in end products:

Table 3.4 Sales of vegetable oils and fats, The Netherlands, 1998 – 2000 (x 1,000 tonnes)

	1998	1999	2000
Total	778	788	848
Of which			
- Human consumption	625	626	658
- Compound feed	52	73	83
- Technical	101	90	107

Source: Commodity Board MVO, Statistical yearbook 2000

The extraction of oils and their refining are all highly mechanised processes. Given the rather wide-spread technology involved, economies of scale can be obtained mainly by processing large volumes.
Over 75% of the EU vegetable oils market for crushing and refining is currently dominated by four large groups: Cereol (France/Italy), Unilever (The Netherlands/UK), ADM (US) and Cargill (US).

Sales of vegetable oils and fats for use in food products increased in 2000 by 7.6%. Within this segment, soy oil decreased by 37,000 tonnes, while rape and palm oil increased by 24,000 and 23,000 tonnes respectively. Sales of coconut oil increased by 18,000 tonnes. These adjustments were mainly caused by price fluctuations of the different types of vegetable oils. This also shows the interchangeability of the products involved.
Sales for use in technical products mainly concern oleo chemicals, paint, ink, lubricants, leather and textiles.

3.2 Market segmentation

The market for animal and vegetable oils and fats can be segmented into:

- Ingredients for grocery products (food and non-food)
- Ingredients for compound feed
- Ingredients for industrial products

Grocery products

The grocery industry is the main user of vegetable oils and fats. Multinationals like Unilever, Nestle, Danone and United Biscuits, together with a host of national producers, use vegetable oils and fats as ingredients for a wide range of food and non-food products. Some applications for end products are mentioned in table 3.4. About 80% of vegetable oils and fats are used for human consumption.
In order to guarantee food safety, producers of food products demand from their suppliers a system of tracing and tracking. This means that ingredients used in food products can be traced back to their origin.
EU countries are further characterised by large cultural differences. These differences have an impact on food consumption in individual countries and even on dietary habits in different regions per country.
Vegetable oils, especially olive oil, have always played a major role in the Mediterranean diets of France, Spain, Italy, Portugal and Greece, while the northern EU countries like Germany, United Kingdom and The Netherlands used more animal oils and fats like butter.

The European Commission, which allocated a budget for publicity campaigns of US$ 32 million during the years 2000 till 2001, further stimulates consumption of olive oil.

Organic food

Organic food is a small but growing segment in the food sector. The EU retail market for organic food is estimated at US $ 2.2 billion and growing by 14.5% per annum. The share of organic food is highest in Denmark and Austria, with 10% and 9.6% respectively. In Germany, The Netherlands, France and the United Kingdom the market share is around 2%.
Apart from the major vegetable oils like olive oil, palm oil, sunflower oil and soybean oil, a range of smaller types are available as organic oils like linseed oil, safflower oil, sesame oil, hazelnut oil and walnut oil. Due to the limited size of the market, these products are very suitable for small and medium-sized producers in developing countries. Brazil, Colombia and Sri Lanka, for instance, supply organic palm oil, palm kernel oil and coconut oil to the EU.
The imports of organic oils are handled by specialised importers/distributors in the EU. They sell the different oils in bulk to the food processing industry or in consumer packing to specialised retail outlets.

Contact detail of importers of organic vegetable oils can be found in Appendix 11. For information on organic production and certification, please contact SKAL, Ecocert, Soil Association and other EU certification agencies (see Appendix 9 for contact details).

Compound feed

The compound feed industry includes the manufacturing of products both for feeding and/or breeding livestock and products for domestic animals.
The breeding-animal feed industry is characterised by the presence of a few large multinationals, like Nutreco, and medium to small national companies. The high costs of transport connected with the volume of the products induce many companies to locate their factories in the proximity of the agricultural enterprises and distribution centres. Compound feed for breeding livestock includes completely prepared feed and supplementary feed.
End products are differentiated according to the type of animal for which the product is destined:
cattle, pigs, poultry, sheep and others.

Animal feed for livestock breeding is a commodity product in a market maturity phase. Overall demand has been decreasing for some years.

A few giants dominate the pet food industry in the EU: Mars (US), Nestlé (CH), Quaker Chiari & Forti (UK) and Spiller Foods (UK). Pet food can be divided into dry and wet food, depending on the water content of more than 80%. Consumption levels of pet food are very different in the various EU countries. Taking 100 as the average per capita expense for pet food in the EU, Finland, Portugal and Greece classify at the bottom of the scale with values of less than 20. Ireland, Italy and Spain occupy a mid-low position, while The Netherlands, Germany, Austria and Denmark occupy a mid-high position. France, Sweden, United Kingdom and Belgium/Luxembourg account for the highest consumption.
Pet food can be easily differentiated; competition therefore focuses on innovation, branding and communication to the buyer of pet food products.

Industrial products industry (paints, varnishes, printing inks, bio-fuels, oleo chemicals)

The paint industry has undergone considerable change from the largely national structure of small to medium size companies to many large international businesses. AKZO Nobel, ICI, Total and the Herberts Group are among the major suppliers in the paint industry.
Manufacturers of printing inks consist primarily of companies that specialise in this market. Their product range is geared to printing inks and related products for virtually all graphic processes. Jojoba oil is a niche product and used as a lubricant for the aviation industry.

Table 3.5 Application of vegetable oils and fats in end products

Product	Application		
	Food	Non-food	Industrial
Soybean oil	Shortenings, mayonnaise, salad dressing, margarine, cooking, confectionery, canned food, breakfast cereals		Paints, varnishes, resins, plastics, linoleum, oilcloth, inks
Palm oil	Margarine, ice-cream, confectionery, filled milk, salad oil, cooking, frying		
Palm kernel oil	Confectionery, bakery, imitation dairy products	Detergents, personal care	
Sunflower oil	Margarine, salad oil, cooking, dietetic food, health food		
Rape seed oil	Cooking, shortenings, margarine		Bio-diesel
Coconut oil	Cooking, margarine, shortenings confectionery, bakery, filled milk, coatings	Soaps, detergents, cosmetics, toothpaste, shampoos, bath oil	Textile chemicals, leather, chrome, tanning, make- up
Groundnut oil	Deep frying, pan frying, margarine, shortenings, salad oil salad dressing	Cosmetics, soaps, detergents	Lamp oil, lubricants, pharmaceuticals,

3.3 Market trends

The grocery industry in the EU is characterised by increasing competitive pressures and a concentration of buying power by the major multi-European retail chains. On the demand side, consumers reveal increasingly sophisticated needs related to the nutritional content of products, time saving in preparation, product information and animal welfare. Food safety issues play a particularly strong role after the different food crises the EU has experienced during the last few years.
Tracing and tracking of ingredients for food products becomes an integral part of a closed food chain, where the products are registered and followed from farmer to table.

Vegetable oils have made substantial inroads in the diets of northern European consumers. This is mainly based on a platform of healthy attributes like a high content of unsaturated fat, having a positive effect on the reduction of heart and cardiovascular diseases. This has contributed to increasing popularity of olive oil and sunflower oil.

The use of genetically manipulated soy and maize is a hotly contested issue in the EU. Generally, consumers are not in favour of using products containing genetically manipulated ingredients. The EU is in the process of preparing directives for the application of GMOs.

Like most other industries, the industry of paints, varnishes and similar coatings, printing inks and mastics is governed by a growing concern for environmental issues. Although EU regulation is sparse, national regulations have forced the industry to search for environmentally friendly materials to replace hazardous substances and to reduce damaging emissions. In this respect, the application of rapeseed oil as bio-diesel shows promising results for the future.

4 PRODUCTION

4.1 Global production of animal and vegetable oils and fats (x 1,000 tonnes)

	1998	1999	2000
Global production	96,914	103,835	108,718
Increase	1.5%	7.1%	4.7%
Of which vegetable oils and fats	81,746	87,603	92,255
Increase	1.5%	7.2%	5.3%
Of which animal oils and fats	14,303	14,878	15,046
Increase	4.2%	4%	1.1%
Of which fish oil	865	1,354	1,417
Increase	-28%	56%	4.7%

Source: Mielke (Oil World) 2001

In 2000, vegetable oils and fats accounted for 85% of total global production, followed by animal oils and fats with 14%. Fish oil constituted only a small part of world production with a share of 1%. Production of vegetable oils and fats increased by an average of 4.4% during 1998-2000. Animal oils and fats production increased by an average of 3.1% during the same period.

4.2 Animal oils and fats

EU production of crude, melted animal oils and fats shows the following picture:

Table 4.1 EU production of animal fats and fish oil by country (x1,000 tonnes)

Country	1998	1999	2000
EU	**2,710**	**2,732**	**2,668**
Germany	567	601	570
Spain	352	367	368
France	328	330	318
Italy	275	287	289
Denmark	279	274	279
The Netherlands	255	239	225
United Kingdom	204	187	182
Belgium and Luxemburg	132	123	127
Austria	103	105	104
Others	214	221	207

Sources: Mielke (Oil World), 2001; Commodity Board MVO, 2001

Germany is the largest producer of animal fats and fish oil in the EU, accounting for 21% of total EU production. Together with Spain (14%), France (12%), Italy (11%) and Denmark (10%), these EU countries account for almost 70% of total EU production in 2000. Production declined by 2% in 2000, compared to 1999.

4.2 Vegetable oils and fats

Production of vegetable oils and fats in the EU is controlled by four major crushers/refiners:

- Cargill, a US based, privately owned company, is the largest. It operates plants in the UK (2), Germany (3), France (2), Spain (2), The Netherlands (2) and Belgium (1). More information can be found on Cargill's website: www.cargill.com.
- Archer Daniel Midlands (ADM), a US based, stock exchange listed company, is the second largest crusher/refiner in the EU. It operates plants in the United Kingdom (1), Germany (5) and The Netherlands (1). Information can be found on ADM's website: www.admworld.com.
- Cereol, a subsidiary of A.B.S. in which Montedison and Fiat are shareholders, is the third largest in the EU. Because A.B.S. wants to divest its food business, Cereol is up for sale.
- Apart from operating its own plants in Italy (2), Spain (3), Germany (1), Austria (1), Denmark and France, Cereol also manages plants on behalf of cooperatives (France). Check for more details: www.cereolworld.com.
- Unilever, the fourth largest, has just sold its subsidiary Unimills in The Netherlands to the Malaysian company Golden Hope, a large processor of palm oil.
  This sale fits into the strategy of Unilever to concentrate on the production, marketing and sales of 400 food brands worldwide. Unilever still owns plants in The Netherlands, Italy, Spain, France and Germany.

EU production of crude vegetable oils and fats shows the following picture:

Table 4.2 EU production of crude vegetable oils and fats by country (x1000 tonnes)

Country	1998	1999	2000
EU	**11,318**	**11,066**	**11,216**
Germany	2,722	2,791	2,822
Spain	2,256	1,921	1,880
France	1,188	1,171	1,296
Italy	1,173	1,145	1,240
The Netherlands	1,148	1,136	1,171
United Kingdom	901	818	801
Belgium and Luxemburg	654	687	667
Greece	583	660	613
Portugal	265	255	277
Denmark	161	165	144
Austria	87	120	127
Finland	92	106	99
Sweden	91	92	98

Sources: Mielke (Oil World), 2001; Commodity Board MVO, 2001

Germany is the largest producer of vegetable oils and fat in the EU (24%). Together with Spain (20%), France (10%), Italy (10%), The Netherlands (10%) and United Kingdom (8%), these countries represented more than 80% of EU production in 2000.
As can be seen from the table, production of vegetable oils and fats in the EU was fairly stable during the period 1998-2000.

Production of the leading products in the EU in 2000 (x 1,000 tons):

Product	Production	Share	Main producing countries
• Rapeseed oil	3,739	33%	Germany (49%), UK (16%), France (15%)
• Soybean oil	2,754	25%	The Netherlands (28%), Germany (25%)
• Sunflower oil	2,152	19%	France (30%), Spain (25%)
• Olive oil	1,969	17%	Spain (42%), Italy (32%), Greece (23%)

These products accounted for 95% of total EU production.

Technical progress in the production of vegetable oils and fats make different types increasingly interchangeable and allows processors flexibility in the application of different vegetable oils and fats in their end products.

5 IMPORTS

As already mentioned in chapter 2 of this survey, the import figures are based on Eurostat data. Other sources can give different figures. Therefore, the statistics should be read with caution. They should not be interpreted as absolute data, but more as trends in the different markets.
Own research remains therefore an integral part in studying the EU market for oils and fats.

Chapters 2, 4 and 15 of the Harmonised System cover the animal and vegetable oils and fats discussed in this survey. Chapters 2 and 4 cover fats derived from animals. As these groups are not important to the exports of developing countries, they are not included in this survey. The chapters Imports and Exports will cover the following product groups:

Animal oils and fats
1501: lard
1502: tallow
1504: fish oil

Vegetable oils and fats
1507: soybean oil
1508: ground-nut oil
1509: olive oil
1511: palm oil
151211: crude sunflower- seed or safflower oil
151311: crude coconut oil
151321: crude palm kernel or babassu oil
1514: rapeseed oil
1515: others (cottonseed oil, linseed oil, sesame oil, castor oil, corn oil)

5.1 Total imports

5.1.1 Animal fats (lard and tallow)

Between 1998 and 2000, imports of animal fats by EU member countries decreased from 858,000 tons to 695,000 tons. Belgium is the leading importer, accounting for 20 percent of total year 2000 imports (in volume) by EU member countries, followed by Spain (19%), The Netherlands (14%), UK (11%) and Germany (10%). Of the leading importers, Spain, UK and Germany saw their imports increase between 1998 and 2000.
Imports from developing countries amounted to only 1% of the total volume imported in 2000. USA and Canada are the largest suppliers outside the EU.

Table 5.1.1 Imports of animal fats into the EU, 1998-2000

	1998		1999			2000		
	value US$	volume	value US$	value Eur	volume	value US$	value Eur	volume
Total	399,265	858,466	243,894	268,015	788,884	205,158	225,448	695,419
Extra-EU	104,894	219,618	62,403	68,575	193,939	54,231	59,594	173,417
Developing countries	1,509	2,488	3,639	3,999	10,857	2,452	2,693	7,308
Belgium & Luxemb.	75,585	156,008	60,620	57,189	170,510	40,967	45,019	139,351
Spain	57,455	124,736	42,998	40,564	123,663	37,491	41,199	133,862
The Netherlands	68,235	143,323	43,940	41,453	124,846	29,567	32,491	98,965
United Kingdom	51,709	115,286	39,421	37,190	75,573	31,059	34,131	77,493
Germany	36,019	71,828	20,884	19,702	63,302	17,193	18,893	69,655
Italy	42,814	93,183	28,604	26,985	80,830	16,156	17,754	54,251
Denmark	23,092	55,319	18,301	17,265	59,526	13,550	14,890	52,452
France	28,025	70,913	15,961	15,058	59,955	8,567	9,414	39,666
Portugal	2,877	5,019	5,135	4,844	12,507	4,654	5,114	14,271
Finland	0,124	0,124	0,258	0,243	0,856	1,530	1,681	5,065
Sweden	5,094	11,064	2,192	2,068	7,019	0,875	0,961	3,165
Ireland	2,000	3,360	1,850	1,745	2,893	1,724	1,895	3,086
Austria	3,139	4,920	2,936	2,770	5,618	1,029	1,131	2,739
Greece	2,535	3,383	0,995	0,939	1,689	0,787	0,865	1,398

Source : Eurostat 2000

Only 4% of imports of animal fats originated in developing countries. In line with developments in the animal fats sector, as described in Chapter 3, imported volume showed a constant decrease.
Belgium, Spain and The Netherlands were the largest importers and accounted for 54% of total imported volume into the EU.

5.1.2 Fish oil

Imports of fish oil into the EU remained on a stable level in volume in 2000 compared to 1999, but decreased in value by 6%. Imports from developing countries, however, increased substantially by 43% in volume and 23% in value. Imports from developing countries, mainly Peru, accounted for 23% in volume and 13% in value of total EU imports in 2000, against only 3% in 1998.
Although imports declined in 2000, The Netherlands remained the largest importer in the EU with 32% of total imported volume, followed by United Kingdom with 16%, France with 14%, Denmark and Italy with 10%. These five countries represent more than 80% of total EU imports.

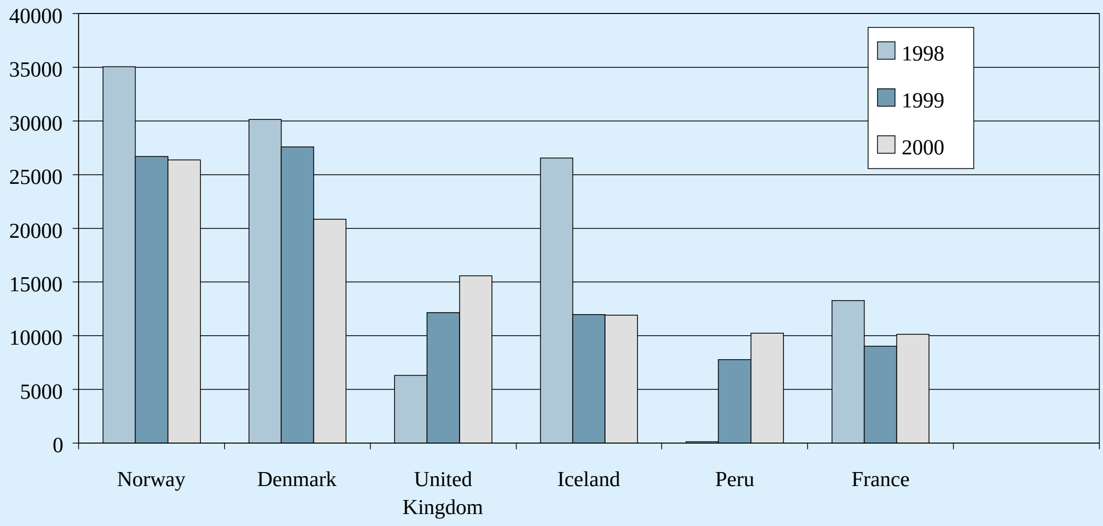
23% of imported volume originated in developing countries. Peru was by far the largest supplier.
The Netherlands, United Kingdom and France accounted for 63% of total imported volume in 2000.

Table 5.1.2 Imports of fish oil into the EU, 1998 – 2000, US$ 1,000/ EUR 1,000/ tons

	1998		1999			2000		
	value US$	volume	value US$	value Eur	volume	value US$	value Eur	volume
Total	180,020	205,540	146,838	138,526	275,337	118,406	130,116	276,665
Extra-EU	89,799	111,592	67,558	63,734	160,700	56,052	61,596	165,273
Developing countries	5,046	6,172	14,437	13,620	43,694	15,247	16,755	62,558
The Netherlands	30,100	39,095	33,227	31,346	96,839	26,276	28,875	89,119
United Kingdom	44,564	49,459	35,577	33,563	46,825	25,301	27,803	44,904
France	23,108	27,678	14,378	13,564	37,335	12,037	13,228	39,677
Italy	17,115	19,690	15,435	14,561	29,157	11,270	12,385	28,694
Denmark	25,652	27,907	16,572	15,634	21,651	15,808	17,371	27,918
Spain	14,213	18,630	8,220	7,754	20,043	7,314	8,307	21,150
Germany	11,228	12,586	7,625	7,193	12,752	7,135	7,841	14,312
Belgium & Luxemb.	2,449	2,421	1,847	1,742	2,292	2,219	2,438	4,281
Greece	1,727	1,812	1,230	1,160	1,879	1,369	1,494	3,013
Ireland	0,913	0,211	6,442	6,077	1,902	5,005	5,500	1,338
Austria	0,968	0,969	0.704	0,644	0,769	0,532	0,585	0,919
Portugal	0,408	0,427	0.260	0,245	0,405	0.354	0,389	0,659
Sweden	3,578	0,475	3,193	3,012	0,423	3,058	3,360	0,590
Finland	4,002	4,180	2,153	2,031	3,065	0.491	0,540	0,091

Source : Eurostat 2001

Figure 5.1.1 Leading suppliers of fish oil to the EU, 1998 – 2000, US$ 1,000



Source: Eurostat 2000

5.1.3 Vegetable oils and fats

The imported volume of vegetable oils and fats into the EU accounted for 88% of the total group of imported animal and vegetable oils and fats. Imports from developing countries accounted for 47% of imported volume in 2000. The Netherlands was the largest importer of vegetable oils in terms of volume (19%), followed by Germany (18%), Italy (15%) and United Kingdom (14%). Together, these four countries accounted for 66% of total imported volume into the EU.

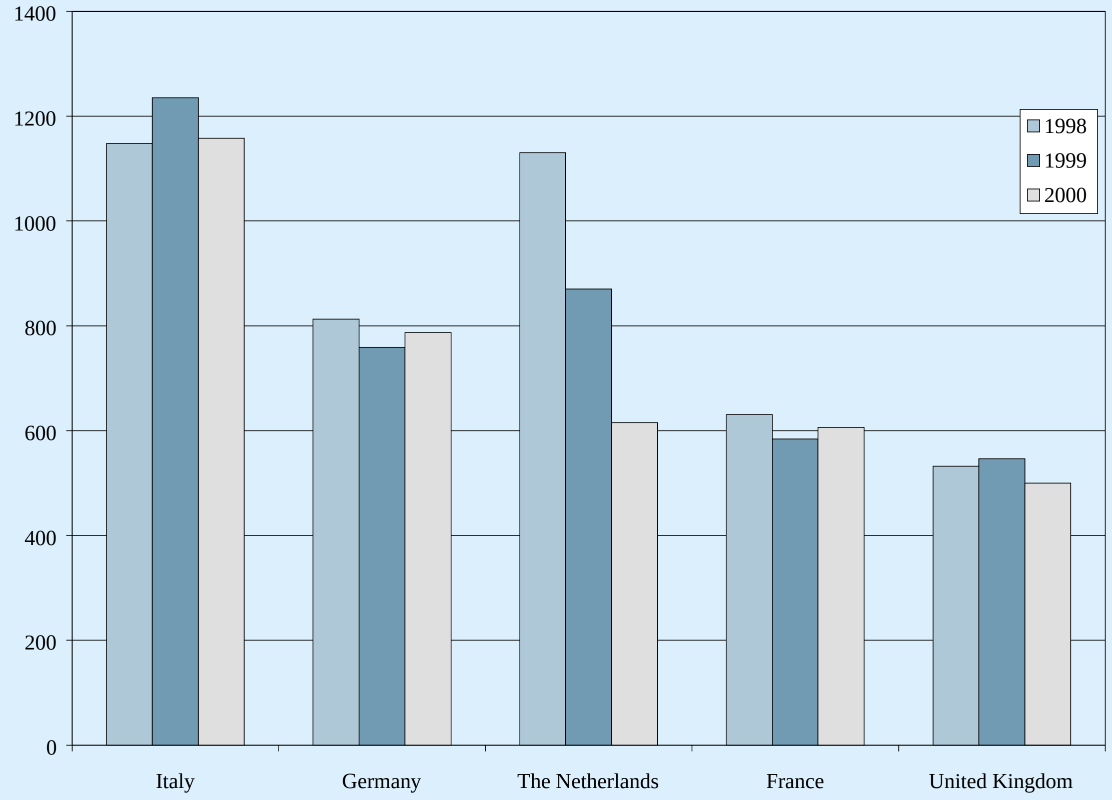
Although imported volume increased by 5% in 2000 compared to 1999, the value of imports decreased by 23% during the same year.

Table 5.1.3 Imports of vegetable oils and fats into the EU, 1998 – 2000, US$ 1,000/ EUR 1,000/ tons

	1998		1999			2000		
	value US$	volume	value US$	value Eur	volume	value US$	value Eur	volume
Total	6,183,503	7,299,484	5,548,173	5.234.125	7,043,832	4,246,669	4,666,669	7,398,411
Extra-EU	2,671,960	3,843,863	2,397,510	2,261,802	3,557,241	1,784,945	1,961,478	3,711,401
Developing countries	2,490,121	3,645,631	2,266,388	2,138,102	3,395,163	1,652,054	1,815,444	3,485,585
The Netherlands	1,265,447	1,923,666	921,741	869,567	1,676,700	559,519	614,856	1,406,460
Germany	910,336	1,206,456	804,630	759,085	1,111,652	715,844	786,642	1,373,965
Italy	1,286,769	977,904	1,309,288	1,235,177	968,232	1,053,483	1,157,674	1,110,953
United Kingdom	598,338	703,420	578,898	546,130	892,330	454,805	499,786	1,000,116
Belgium & Luxemb.	447,163	605,932	413,535	390,127	684,351	362,731	398,605	793,815
France	707,120	720,053	618,685	583,665	660,342	551,689	606,252	738,630
Spain	271,995	355,619	338,346	319,194	366,734	159,733	175,531	323,966
Denmark	162,960	227,469	109,071	102,897	172,189	84,929	93,329	181,159
Sweden	129,871	152,454	104,658	98,734	139,436	71,467	78,535	120,502
Austria	79.036	90,409	62,623	59,078	79,336	51,946	57,084	105,987
Portugal	155,751	146,536	139,036	131,166	112,723	85,421	93,869	86,299
Ireland	62,695	65,047	56,828	53,611	72,503	46,941	51,584	72,427
Greece	75,094	89,449	50,263	47,418	78,544	34,329	37,724	57,420
Finland	32,928	33,401	23,756	22,411	26,782	18,380	20,198	26,268

Source : Eurostat 2000

Figure 5.1.2 Leading EU importing countries of vegetable oils and fats, 1998 – 2000, US$ million



Source: Eurostat 2000

Italy

Italy was the largest importer of vegetable oils and fats in terms of value in 2000. The import value amounted to US$ 1,053 million, accounting for 25% of total EU imports. The major products were:

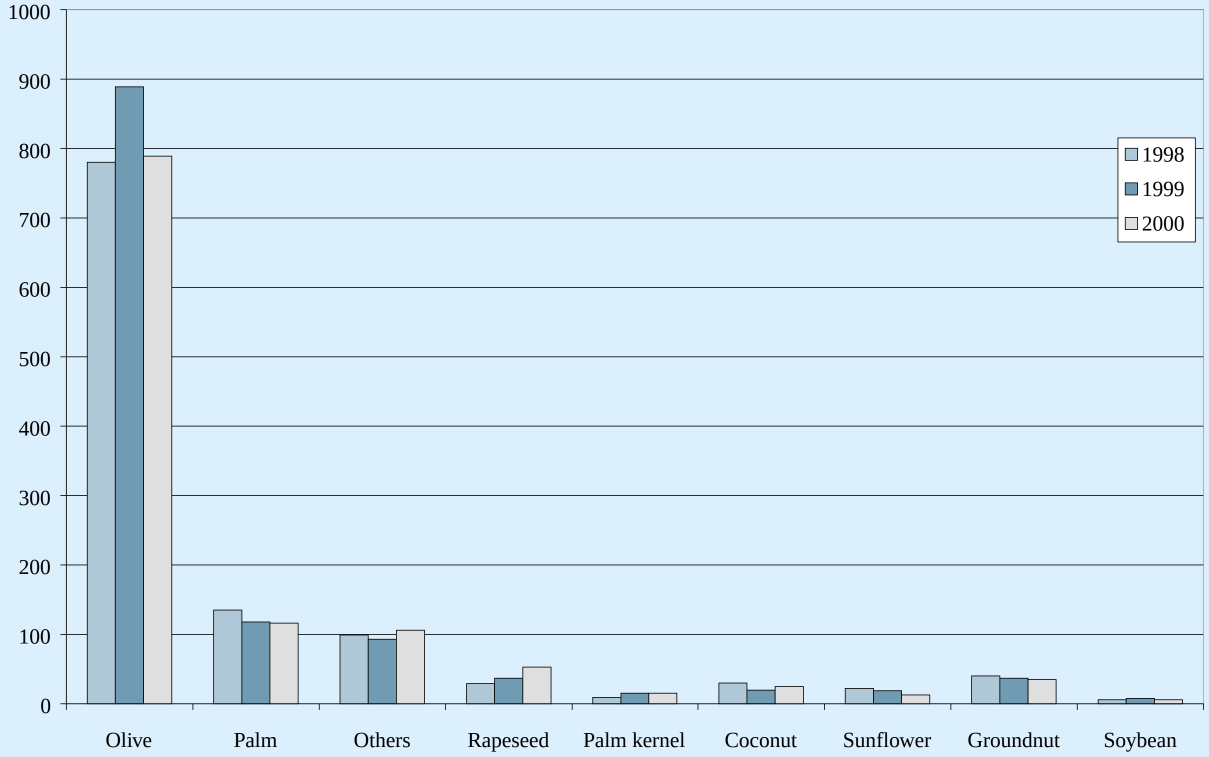
Product	Import value in US $ million	Import share in %
Olive oil	718	68
Palm oil	106	10
Others	96	9

The import market in 2000 shows a decrease in value of 11% compared to 1999, but an increase in volume of 3.5% (412,000 tons)
However, the volume in 2000 was still 2.6% lower compared to 1998, when 423,000 tons were imported.

The leading suppliers of vegetable oil and fats to Italy (share of total 2000 imports in terms of value)
→ Spain (33%), Greece (20%), Tunisia (15%), Malaysia (5%), USA (5%), Papua New Guinea (3%)

Spain, Greece and Tunisia are the main suppliers of olive oil, while Malaysia and Papua New Guinea supply palm oil.

Figure 5.1.3 Imports of vegetable oils and fats into Italy, 1998 – 2000, US$ million



Source: Eurostat 2000

Germany

In terms of value, Germany was the second largest importer of vegetable oils and fats in 2000. The import value amounted to US$ 716 million, accounting for 17% of total EU imports. The major products in 2000 were:

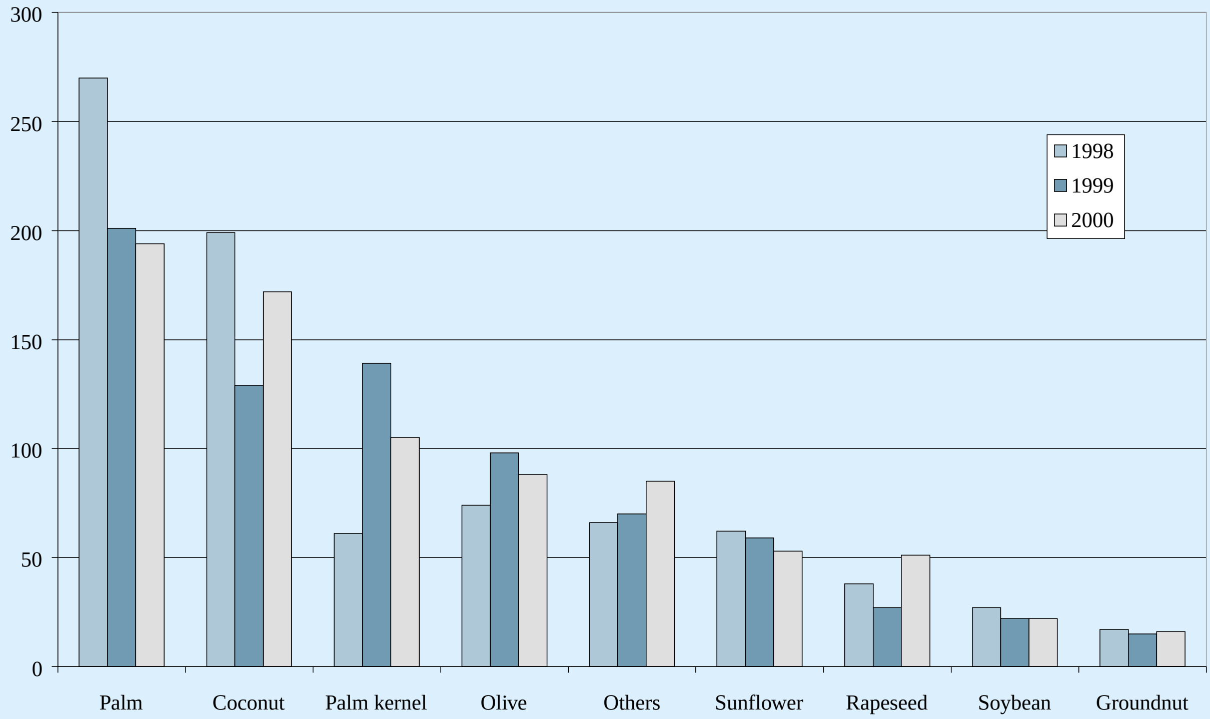
Product	Import value in US $ million	Import share in %
Palm oil	177	25
Coconut oil	157	22
Palm kernel oil	96	13
Olive oil	80	11

These four products accounted for more than 70% of total imports.
After a dip in 1999, volume increased sharply in 2000. However, imports based on value in 2000 remained below the 1998 level.

The leading suppliers of vegetable oil and fats to Germany (share of total 2000 imports in terms of value)
→ Indonesia (34%), The Netherlands (13%), Italy (11%), Malaysia (9%), Philippines (8%), India (4%), Belgium (3%)

Indonesia is a large supplier of palm oil, coconut oil and palm kernel oil, while Malaysia supplies palm oil and palm kernel oil. The Philippines is the main supplier of coconut oil to Germany.

Figure 5.1.4 Imports of vegetable oils and fats into Germany, 1998 – 2000, US$ million



Source: Eurostat 2000

The Netherlands

As the third country in the EU in terms of value, The Netherlands imported vegetable oils for US$ 560 million in 2000, which was an import share of 13% of total EU imports. The major imported products in 2000 were:

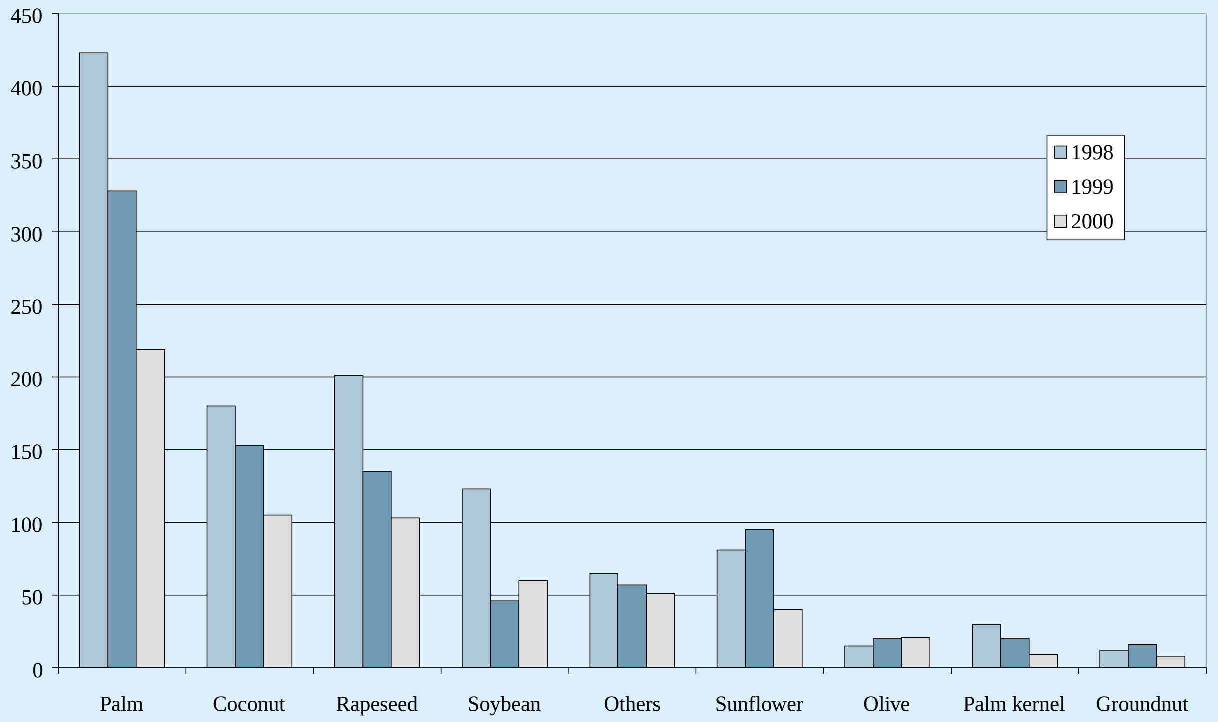
Product	Import value in US $ million	Import share in %
Palm oil	199	36
Coconut oil	96	17
Rapeseed oil	94	17

These products accounted for 70% of total imported value into The Netherlands.
During the period 1998 –2000, imports into The Netherlands decreased consistently; 46% in value and 27% in volume. This decrease applied to all the above- mentioned product groups. Only olive oil showed an increase in volume: from 6,000 tons in 1998 to 7,900 tons in 2000.

The leading suppliers of vegetable oil and fats to The Netherlands (share of total 2000 imports in terms of value)
→ Indonesia (25%), Germany (20%), Malaysia (13%), Philippines (9%), Belgium (3%), India (2%)

Indonesia and Malaysia are the main suppliers of palm oil to The Netherlands, accounting for 93% of imports. The Philippines and Indonesia are the major suppliers of coconut oil, while Germany supplied 70% of the imports of rapeseed oil into The Netherlands in 2000.

Figure 5.1.5 Imports of vegetable oils and fats into The Netherlands, 1998 – 2000, US$ million



Source: Eurostat 2000

France

In terms of value, France was the fourth largest importer of vegetable oils and fats in 2000. The import value amounted to US$ 551 million, accounting for 13% of total EU imports. The major products in 2000 were:

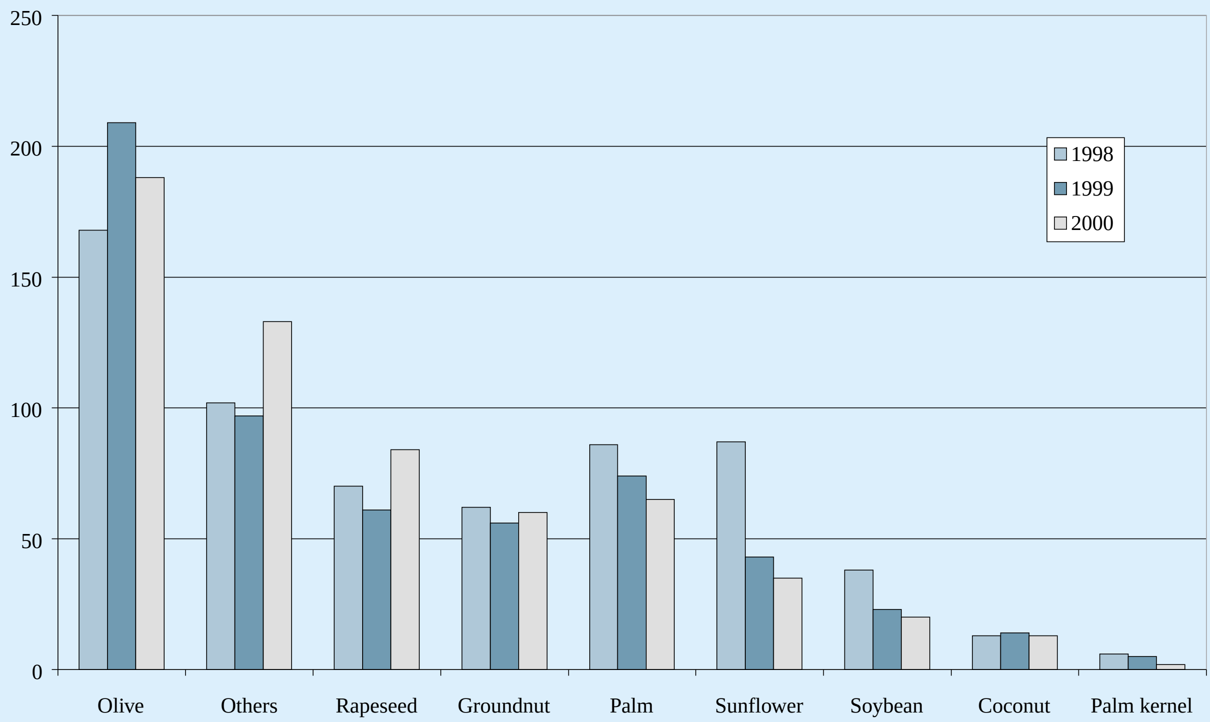
Product	Import value in US $ million	Import share in %
Olive oil	171	31
Others	121	22
Rapeseed oil	76	14
Palm oil	59	11

The above-mentioned products represented 78% of total value imported into France.
After a dip in 1999, imported volumes recovered again in 2000 and increased by 2.6% compared to 1998. Based on value, the imports in 2000 remained 4% below the 1998 level.
Olive oil, the largest imported product, shows a consistent growth during 1998 – 2000; volume increased from 78,000 tons in 1998 to 83,000 tons in 2000. Also the product group 'Others' showed a strong recovery in 2000: volume increased to 133,000 tons from 97,000 tons in 1999.

The leading suppliers of vegetable oil and fats to France (share of total 2000 imports in terms of value)
→ Spain (20%), Belgium (17%), The Netherlands (12%), India (11%), Italy (11%), Senegal (6%)

Spain and Italy supplied 96% of olive oil to France, while India accounted for 48% of other products (castor oil). The Netherlands and Belgium supplied a variety of vegetable oils and fats to France. Senegal supplied 60% of the groundnut oil imports into France.

Figure 5.1.6 Imports of vegetable oils and fats into France, 1998 – 2000, US$ million



Source: Eurostat 2000

United Kingdom

The United Kingdom was the fifth largest importer of vegetable oils and fats in 2000. The import value amounted to US$ 455 million, accounting for 11% of total EU imports.
Major imported products in 2000 were:

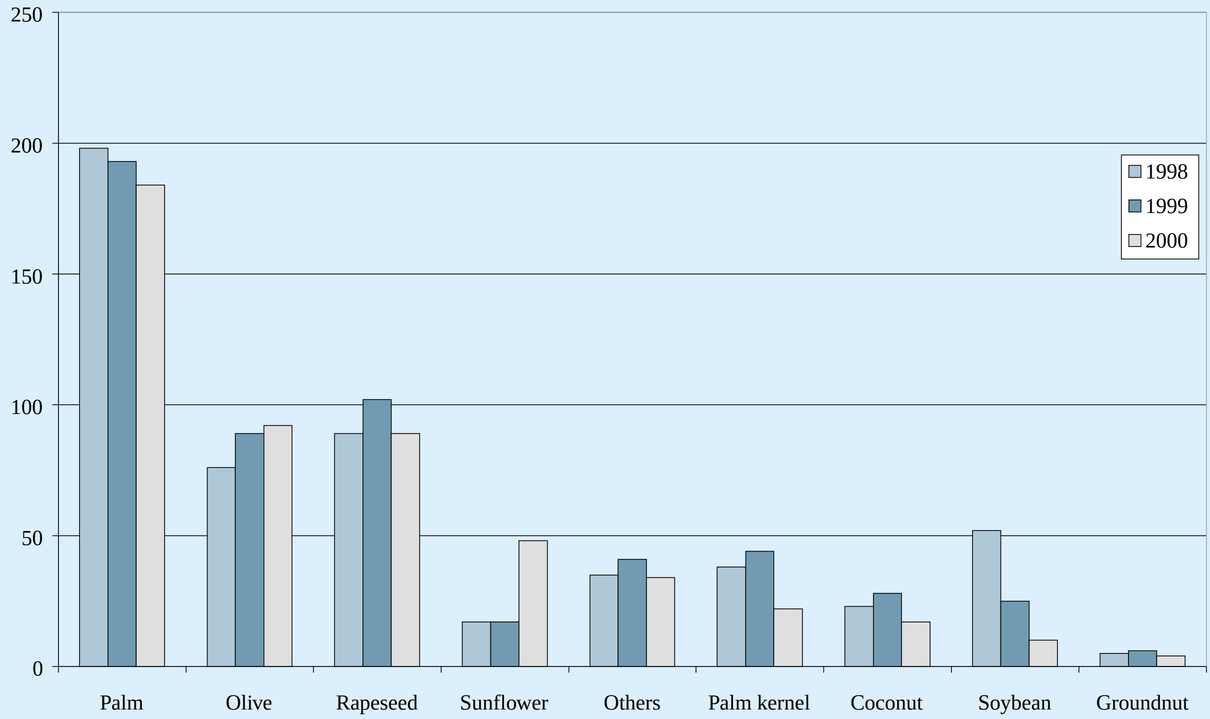
Product	Import value in US $ million	Import share in %
Palm oil	167	37
Olive oil	84	18
Rapeseed oil	81	18
Sunflower oil	44	10

These products accounted for more than 80% of total imported value into the United Kingdom.
The imports in terms of volume showed a consistent increase: from 703,000 tons in 1998 to 1,000,000 tons in 2000, an increase of 42%. The largest product, palm oil, increased by 48% in volume during the period under review and represents 55% of total imported volume in the United Kingdom.
Also olive oil and rapeseed oil increased consistently in volume during the period under review, by 52% and 97% respectively.

The leading suppliers of vegetable oil and fats to United Kingdom (share of total 2000 imports in terms of value)
→ The Netherlands (22%), Indonesia (11%), Papua NG (9%), Spain (8%), Italy (7%), Malaysia (6%), France (5%)

The Netherlands supplied a variety of vegetable oils and fats to the United Kingdom. Indonesia, Malaysia and Papua NG supplied 93% of palm oil imports. Spain and Italy covered 92% of olive oil imports.

Figure 5.1.7 Imports of vegetable oils and fats into United Kingdom, 1998 – 2000, US$ million



Source: Eurostat 2000

5.2 Imports by product group

As already mentioned, the imports of tallow and lard from developing countries are very small.
These products offer limited opportunities for developing countries. Therefore this chapter deals with the different product groups of vegetable oils. Products that are of real importance to developing countries will be highlighted: palm oil, coconut oil, palm kernel oil and olive oil. These products accounted for 82% of imports from developing countries in value and 89% in volume in 2000.

Import figures for the different products show different trends. This is caused by supply and demand and subsequent prices. As mentioned in chapter 3 of this study, many oil products are interchangeable.
A record crop will cause an increase in supply with often decreasing prices. Importers and processors can switch quickly to other vegetable oils, when prices for these products are dropping.

Table 5.2.1 Imports of vegetable oils and fats per product group into the EU, 1998 - 2000, US$ 1,000 / EUR 1,000 / tons

	1998		1999			2000		
	value US$	volume	value US$	value Eur	volume	value US$	value Eur	volume
Olive oil	1,461,224	667,549	1,743,087	1,644,422	711,367	1,234,204	1,356,268	655,540
Extra-EU	190,415	116,550	437,138	412,394	218,130	182,391	200,430	108,321
Developing countries	189,844	116,434	436,353	411,654	217,738	181,700	199,670	107,910
Palm oil	1,617,482	2,489,005	1,259,961	1,188,643	2,45,820	942,032	1,035,200	2,637,608
Extra-EU	1,226,982	2,019.857	880,713	830,861	1,855,635	656,734	721,686	1,996,490
Developing countries	1,221,389	2,009.758	863,549	814,669	1,818,522	648,855	713,027	1,972,532
Others	601,810	561,674	499,122	470,870	500,274	472,388	519,108	584,815
Extra-EU	278,221	272,029	193,919	182,942	185,604	253,522	278,596	307,731
Developing countries	120,661	110,064	102,698	96,885	93,826	149,072	163,815	150,409
Rapeseed oil	725,193	1,036,076	548,579	517,527	1,050,787	468,047	514,337	1,185,037
Extra-EU	3,453	4,336	5,599	5,282	6,936	2,164	2,378	4,059
Developing countries	2,762	3,227	0,071	0,067	0,088	0	0	0
Coconut oil	576,261	893,147	430,484	406,117	574.873	372,394	409,224	706.606
Extra-EU	534,181	836,567	392,273	370,069	530.795	350,140	384,769	670.488
Developing countries	534,094	836,432	392,183	369,984	530.673	350,140	384,769	670.488
Soybean oil	459,809	670,055	313,461	295,718	618,737	231,614	254,521	649.338
Extra-EU	3,948	4,618	2,516	2,374	3,259	3,598	3,954	8.081
Developing countries	1,929	2,938	0,537	0,507	0,803	0,265	0,291	0.374
Sunflower oil	362,065	503,821	299,322	282,379	537,989	200,215	220,017	439,941
Extra-EU	137,763	195,167	118,378	111,677	244,562	52,209	57,372	131,648
Developing countries	122,801	172,168	104,858	98,923	222,267	39,147	43,019	100,251
Palm kernel oil	195,220	295,517	276,423	260,776	404,091	189,696	208,457	364,028
Extra-EU	171,167	262,253	250,134	235,975	362,606	181,035	198,940	343,853
Developing countries	171,160	262,253	250,134	235,975	362,606	181,940	198,940	343,853
Groundnut oil	184,439	182,640	177,733	167,673	192,894	136,079	149,537	175,498
Extra-EU	125,830	132,486	116,842	110,228	149,714	103,151	113,353	140,730
Developing countries	125,480	132,357	116,004	109,438	148,640	102,106	112,204	140,142

Source: Eurostat 2000

In the following review per product group, the import share of developing countries can fluctuate substantially. The reasons are a combination of supply and demand of products, both in the EU and the exporting developing countries. A record crop of, for example, rapeseed or sunflowers in the EU can lead to an oversupply situation of rapeseed oil and sunflower oil in the EU. Due to falling prices for these products, processors might decrease their imports from developing countries in favour of lower priced products available from EU sources.

5.2.1 Olive oil

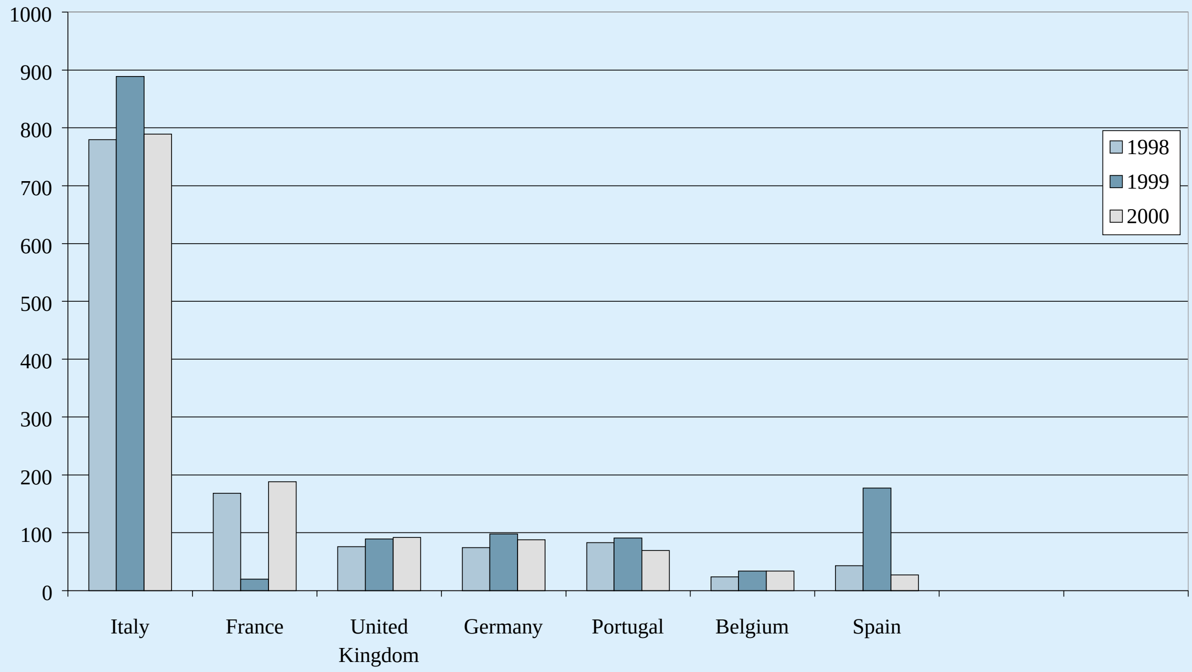
Olive oil is the largest vegetable oils and fats imported product in the EU (29% in value) and the third product in terms of volume after palm oil and coconut oil. Imports peaked in 1999, decreasing again in 2000. 85% of imports (in value) in 2000 originated in EU countries; 15% originated in two developing countries, of which Tunisia supplied US$ 168 million (92%) and Turkey US$ 10 million (6%).

The import share of developing countries shows the following picture:

	1998	1999	2000
Import share in value	13%	25%	15%
Import share in volume	17%	31%	16%

The leading suppliers of olive oil to the EU from developing countries (share of total 2000 imports in terms of value)
→ Tunisia (14%), Turkey (8%)

Figure 5.2.1 Imports of olive oil into the main EU countries, US$ thousand, 1998 –2000



Source: Eurostat 2000

5.2.2 Palm oil

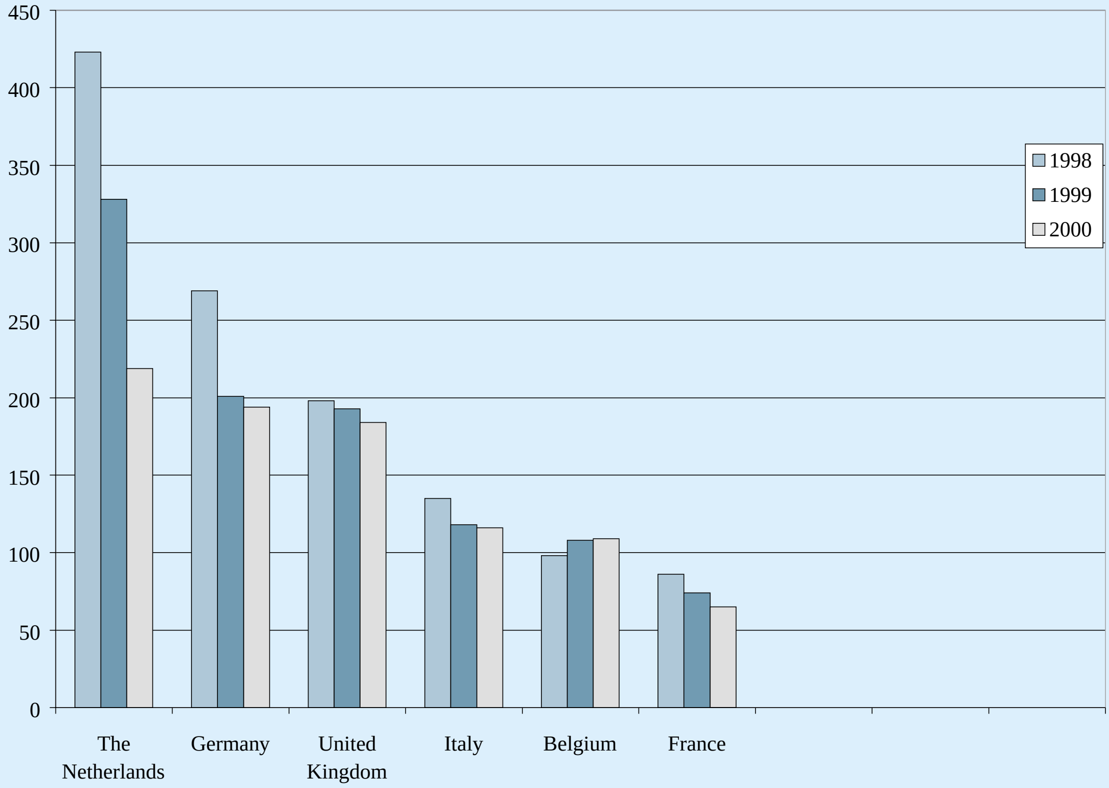
Palm oil was the second largest product imported into the EU by value (22%) in 2000 and by far the leading imported product into the EU in volume (36%). Although volume increased by 7.5% in 2000, value decreased by 13% compared to 1999.
70% of imports (in value) in 2000 originated in non-EU countries, almost all in developing countries. Malaysia was the largest supplier with US$ 273 million (29%) in 2000, followed by Indonesia with US$ 260 million (28%) and Papua New Guinea with US$ 83 million (9%). Smaller supplier countries are Ghana (US$ 7 million), Brazil (US$ 6.3 million), Ivory Coast (US$ 4.6 million) and Colombia (US $ 4.6 million).

Import share of developing countries shows the following:

	1998	1999	2000
Import share in value	76%	69%	69%
Import share in volume	81%	74%	75%

The leading suppliers of palm oil to the EU from developing countries (share of total 2000 imports in terms of value)
→ Malaysia (29%), Indonesia (28%), Papua New Guinea (9%)

Figure 5.2.2 Imports of palm oil into the main EU countries, US$ thousand, 1998 – 2000



Source: Eurostat 2000

5.2.3 Coconut oil

Coconut oil was the fifth largest product imported into the EU in 2000 (in value). Imports from developing countries accounted for 84% of total imports. Coconut oil is the second largest product imported from developing countries with a value of US$ 350 million in 2000.

After a dip in 1999, the imports of coconut oil recovered in 2000. However, they remained under the 1998 level by 20% in value and volume.

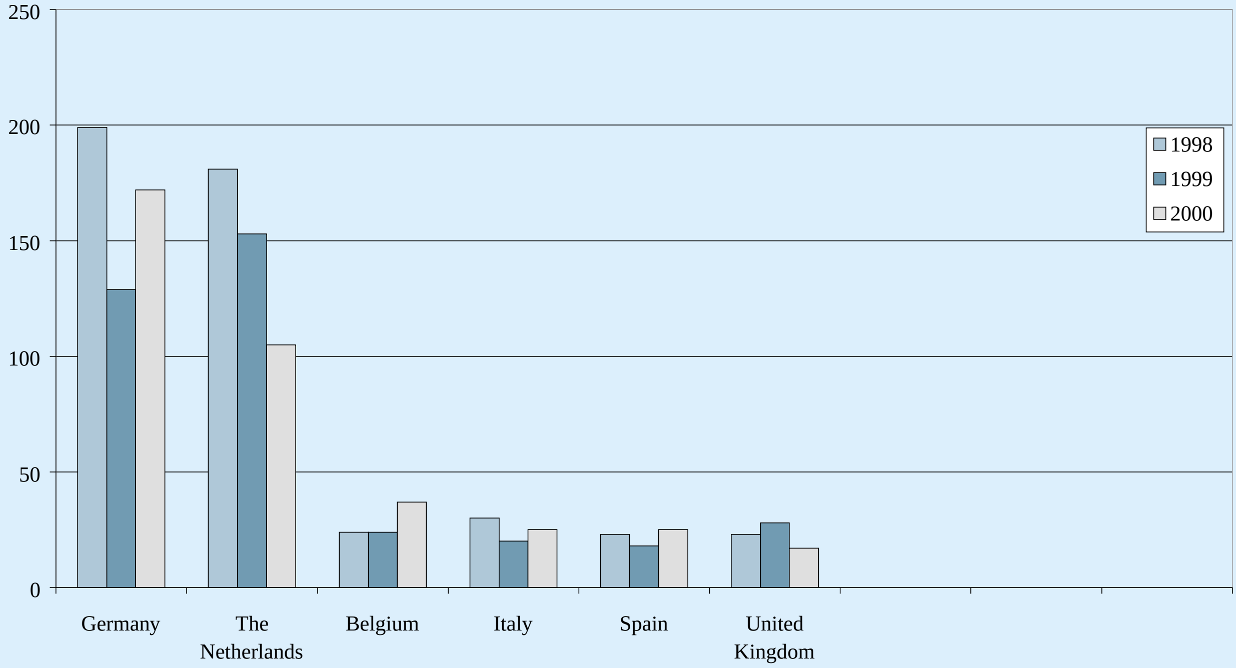
The import share of developing countries of total EU imports is, together with palm oil and palm kernel oil, the highest of all vegetable oils:

	1998	1999	2000
Market share in value	93%	91%	94%
Market share in volume	94%	93%	95%

The leading suppliers of coconut oil to the EU from developing countries (share of total 2000 imports in terms of value)

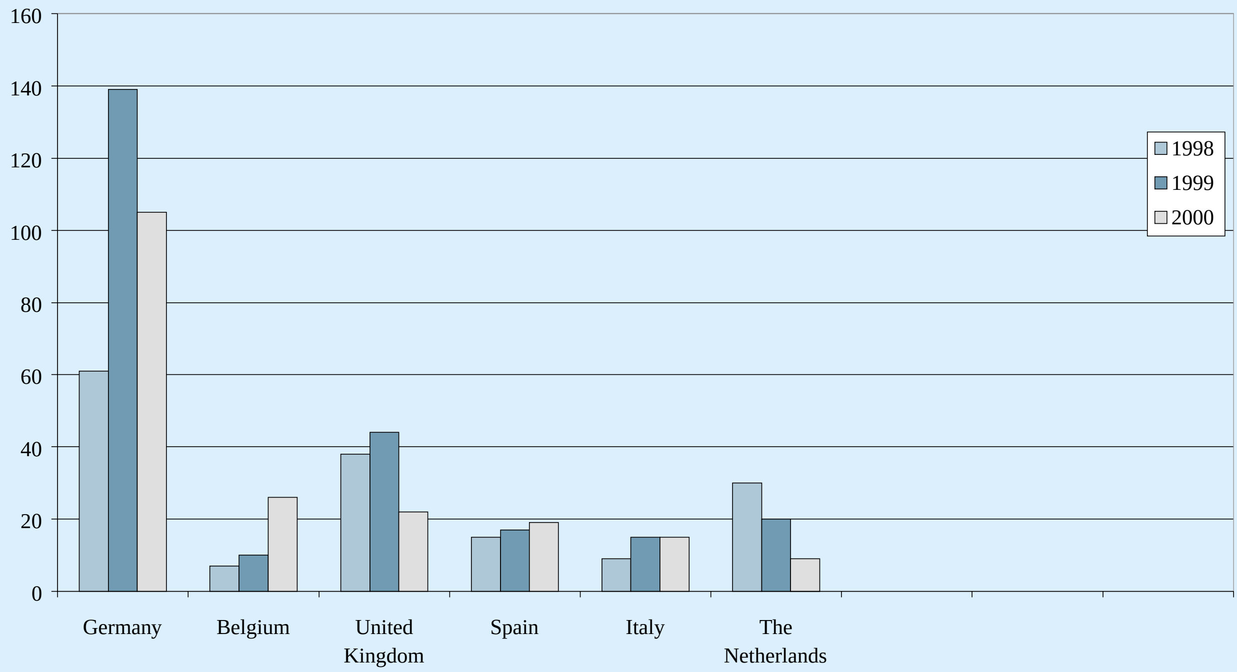
→ Indonesia (47%), Philippines (38%), Papua New Guinea (5%)

Figure 5.2.3 Imports of coconut oil into the main EU countries, US$ thousand, 1998 – 2000



Source: Eurostat 2000

Figure 5.2.4 Imports of palm kernel oil into the main EU countries, US$ thousand, 1998 – 2000



Source: Eurostat 2000

5.2.4 Palm kernel oil

After the top year 1999, imports of palm kernel oil decreased in 2000 both in value and volume. However, they are still above the 1998 level. Developing countries strengthened their supply position during the period under review: from 88% of total imports (in value) in 1998 to 95% in 2000.
The import share of developing countries increased between 1998 and 2000:

	1998	1999	2000
Import share in value	88%	90%	95%
Import share in volume	89%	90%	95%

The leading suppliers of palm kernel oil to the EU from developing countries (share of total 2000 imports in terms of value)
→ Indonesia (75%), Malaysia (8%),
Papua New Guinea (7%)

5.2.5 Rapeseed oil

Almost 100% of imports of rapeseed oil in 2000 originated in intra-EU trading. No rapeseed oil was imported from developing countries. As the EU is a large producer of rapeseed oil and is self-sufficient in supplying the processing industry, this product does not present opportunities for developing countries.

5.2.6 Soybean oil

Between 1998 and 2000, imports of soybean oil by EU member countries decreased from US$ 459 (67,000 tons) to US$ 232 million (649,000 tons). Belgium is the leading importer, accounting for 36 percent of total 2000 imports (in value) by EU member countries, followed by The Netherlands (23%) and Germany (9%). Imports from developing countries are negligible, as intra-EU trade accounts for 98% of soybean oil imports in EU member countries.

5.2.7 Sunflower oil

Total imports of sunflower oil by EU countries decreased during the period 1998 – 2000, both in value and volume. The decrease showed in the major importing countries: Germany, France, The Netherlands and Belgium. Only imports into the United Kingdom increased during the period under review.
Although the import share of developing countries still increased in 1999, a sharp decline followed in 2000:

	1998	1999	2000
Import share in value	34%	35%	20%
Import share in volume	34%	41%	23%

The leading supplier of sunflower oil to the EU from developing countries (share of total 2000 imports in terms of value)
→ Argentina (18%)

The leading suppliers of groundnut oil to the EU from developing countries (share of total 2000 imports in terms of value)
→ Senegal (51%), Argentina (20%), Sudan (4%)

5.2.8 Groundnut oil

Between 1998 and 2000, imports of groundnut oil into EU member countries decreased from US$ 153 million (193,000 tons) to US$ 137 million (175,000 tons). France remained the largest importer, accounting for 40% of total EU imports (in value), followed by Italy (23%), Belgium (15%) and Germany (11%).
Developing countries are by far the largest suppliers of groundnut oil to the EU, accounting for 75% of total EU imports (in value) during 2000. In view of a decreasing import market in 2000, developing countries were able to increase their position, both in value (+2.5%) and import share (+10%). Senegal was the largest supplier to the EU in 2000 with US$ 70 million (51%) and 95,000 tons (54%), followed by Argentina with US$ 26 million (20%) and 38,000 tons (22%) and Belgium with US$ 18 million (14%) and 19,000 tons (11%). These three countries represented 85% of the total import value during 2000. The import share of developing countries shows the following:

	1998	1999	2000
Import share in value	68%	65%	75%
Import share in volume	72%	77%	80%

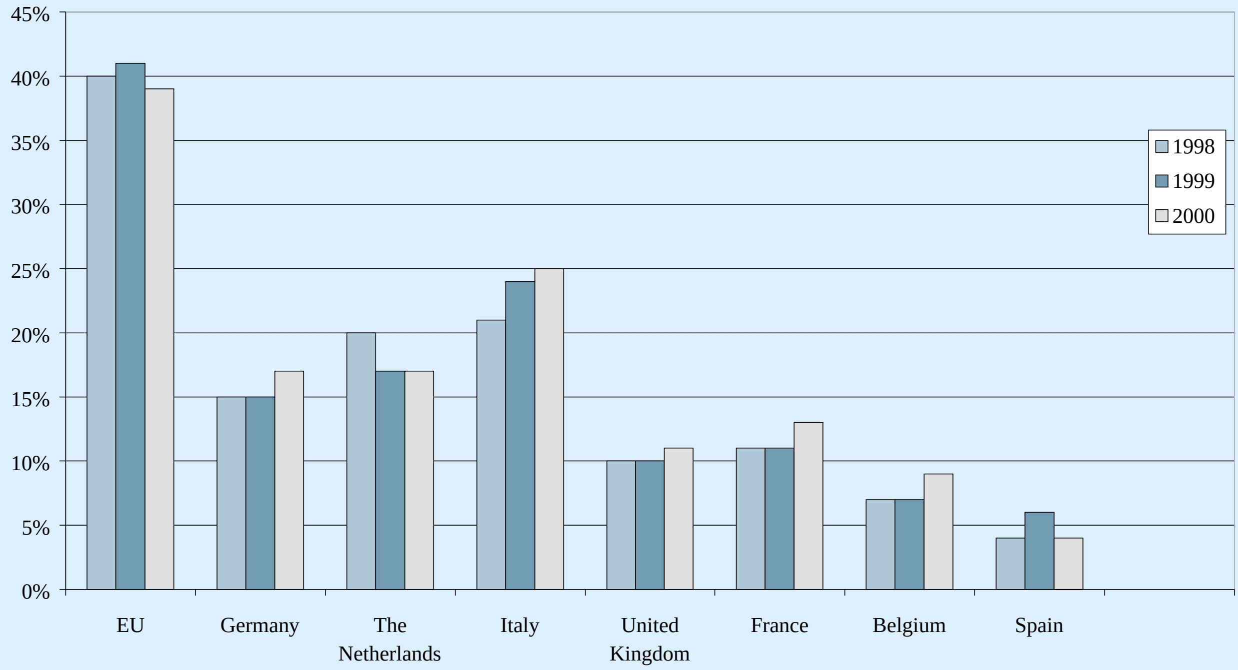
5.3 The role of the developing countries

Between 1998 and 2000, imports of vegetable oils and fats from developing countries decreased on a value basis from US$ 2,490 million in 1998 to US$ 1,652 million in 2000. Volume decreased from 3,645,000 tons in 1998 to 3,486,000 tons in 2000, a decrease of 4.4%. The import share of developing countries in total EU imports decreased slightly:

	1998	1999	2000
Import share in value	40%	41%	39%
Import share in volume	50%	48%	47%

The role of the developing countries in the exports to EU countries depends to a large extent on a complex number of factors, which can vary from year to year. As many products are interchangeable in the application for industrial use, imports from developing countries depend on:
– size of harvest per product and resulting prices in the EU, USA and developing countries
– fluctuations of developing countries' currencies vis-à-vis the US$
– demand from the processing industry.

Figure 5.9 Share of developing countries in imports of vegetable oils and fats into selected EU countries, 1998-2000, % of imported value



Source: Eurostat 2000

Among the top fifteen countries supplying the EU with vegetable oils and fats are the following developing countries: Indonesia, Malaysia, Tunisia, Philippines and India. Other important developing country suppliers to the EU are Papua New Guinea, Senegal and Argentina.

Product groups		**Main developing country suppliers (share in % of imported value supplied by developing countries, 2000)**	**Share DCs of total imported value, 2000**
Palm oil	→	Malaysia (42%), Indonesia (40%), Papua New Guinea (13%)	69%
Coconut oil	→	Indonesia (50%), Philippines (40%), Papua New Guinea (5%),	100%
Palm kernel oil	→	Indonesia (79%), Malaysia (8%), Papua New Guinea (7%)	100%
Olive oil	→	Tunisia (93%), Turkey (5%)	15%
Others	→	India (75%), China (8%), Brazil (6%)	32%
Groundnut oil	→	Senegal (68%), Argentina (26%), Sudan (5%)	75%
Sunflower oil	→	Argentina (93%)	20%

DCs = Developing countries
Source: Eurostat, 2000

6 EXPORTS

Table 6.1 Intra-EU exports of lard and tallow into the EU, 1998-2000, US$ 1,000 / EUR 1,000 / tons

	1998		1999			2000		
	value US$	volume	value US$	value Eur	volume	value US$	value Eur	volume
Total	294,370	638,848	211,433	199,465	594,962	150,924	165,851	522,003
Germany	111,014	249,605	80,431	75,878	242,912	54,846	60,270	194,664
France	66,614	142,209	43,615	41,146	123,870	31,785	34,929	113,339
The Netherlands	24,078	45,700	22,435	21,165	58,418	16,066	17,655	49,005
Denmark	14,296	27,021	12,049	11,367	32,605	10,554	9,957	29,939
Belgium & Luxemb.	27,518	62,709	12,581	11,868	35,252	7,603	8,355	26,927
Italy	10,004	39,155	9,834	9,277	25,843	7,549	8,296	25,955
Austria	7,689	19,210	3,837	3,620	17,896	3,700	4,066	21,359
Ireland	16,428	20,742	12,853	12,125	20,958	7,564	8,313	20,454
Spain	2,799	5,088	4,815	4,542	11,686	4,474	4,917	13,829
Sweden	5,027	10,425	4,387	4,139	12,713	3,634	3,993	12,965
United Kingdom	6,833	13,155	3,612	3,408	9,725	3,710	4,077	10,995
Finland	1,183	2,340	0,569	0,536	1,995	0,253	0,278	0,884
Portugal	0,870	1,470	0,443	0,418	1,018	0,268	0,294	0,714
Greece	0	0	0,003	0,002	0,002	0,051	0,056	0,127

Source: Eurostat 2000

In 2000, the leading destinations were Germany, the United Kingdom, Italy, The Netherlands and France. They imported almost 50 percent of total exports by EU member countries. Most of the trade is intra-EU oriented (70% of total exported value).

Table 6.2 Intra-EU exports of fish oil into the EU, 1998 -2000, US$ 1,000 / EUR 1,000 / tons

	1998		1999			2000		
	value US$	volume	value US$	value Eur	volume	value US$	value Eur	volume
Total	90,226	93,948	79,275	74,788	114,646	62,355	68,522	111,392
Denmark	33,779	40,155	29,236	27,581	56,730	18,990	20,868	56,666
France	14,879	15,279	9,559	9,018	18,070	9,214	10,125	20,545
The Netherlands	15,172	13,310	10,506	9,911	10,678	8,976	9,864	12,232
Sweden	5,615	7,692	5,358	5.055	9,828	1,392	1,530	5,382
Germany	5,944	6,714	5,629	5,310	4,477	4,910	5,396	4,642
Belgium & Luxemb.	0,992	1,325	1,540	1,453	2,959	1,550	1,703	3,383
United Kingdom	7,062	1,612	12,871	12,142	3,641	14,152	15,552	3,384
Spain	3,931	4,886	2,909	2,744	6,552	1,073	1,179	1,748
Ireland	0,717	1,379	0,276	0,260	0,559	0,699	0,768	1,622
Portugal	1,112	1,335	0,192	0,181	0,559	0,424	0,466	1,346
Austria	0.187	0.052	0.568	0.536	0.398	0.525	0.577	0.375
Italy	0,739	0,153	0,363	0,342	0,193	0,113	0,124	0,055
Finland	0.006	0,001	0,2680	0,253	0,002	0,312	0,343	0,005
Greece	0.093	0,056	0	0	0	0	0	0

Source: Eurostat 2000

Table 6.3 Intra-EU exports of vegetable oils and fats into the EU, 1998 -2000, US$ 1,000 / EUR 1,000 / tons

	1998		1999			2000		
	value US$	volume	value US$	value Eur	volume	value US$	value Eur	volume
Total	3,431,481	3,339,026	3,121,075	2,944,410	3,461,217	2,431,517	2,671,997	3,594,455
The Netherlands	823,582	1,029,048	776,574	732,617	1,321,486	577,042	634,112	1,342,935
Germany	537,545	774,761	416,043	392,493	741,594	328,384	360,862	786,168
Belgium & Luxemb.	321,650	418,941	250,743	236,550	382,632	198,961	218,639	401,733
Spain	819,619	438,051	528,891	498,954	247,100	601,232	660,694	366,810
France	174,438	210,569	152,555	143,920	232,002	116,024	127,499	227,099
Italy	280,024	131,591	318,825	300,778	131,473	254,447	279,612	145,105
Greece	270,744	115,025	505,473	476,861	203,072	220,529	242,340	119,039
United Kingdom	125,096	143,542	87,800	82,830	110,092	59,271	65,133	83,665
Denmark	37,393	34,640	37,560	35,434	41,611	29,378	32,284	44,998
Sweden	23,847	25,276	19,002	17,927	24,117	15,348	16,866	23,573
Portugal	10,493	11,626	15,168	14,309	14,386	13,559	14,900	21,856
Austria	3,226	1,812	5,887	5,554	5,389	6,915	7,599	9,535
Finland	1,225	1,696	0,237	0,224	0,517	3,161	3,474	9,012
Ireland	2,503	2,448	6,317	5,959	5,746	3,383	3,718	3,299

Source: Eurostat 2000

France was the largest importer of fish oil in 2000 with an imported volume of 21,874 tons (20% of total intra-EU imports). Italy was the second largest country with 19,313 tons (17%), followed by Spain with 17,527 tons (16%), The Netherlands and Germany with 13,310 and 12,883 tons respectively. Together these countries represent 75% of total intra-EU exports.

Intra-EU trading in vegetable oils and fats is huge and still growing in volume. The largest exporting countries in 2000 based on volume were The Netherlands (37% export share), Germany (22% export share) and Belgium (11% export share). These countries accounted for 70% of total intra-EU exports.

Based on value, the picture is different. Spain was the largest exporting country in the EU (olive oil) with a share of 25% of total intra-EU exports, followed by The Netherlands (24%), Germany (14%) and Italy (10%). Together they account for more than 70% of total exports based on value.

In terms of products exported between EU countries, the picture is as follows:

Product	**Value (US$ 1,000)**	**Export share**
• Olive oil	1,047,029	43%
• Rapeseed oil	462,185	19%
• Palm oil	284,749	12%
• Soya oil	201,803	8%

Product	**Volume (1,000 tonnes)**	**Export share**
• Rapeseed oil	1,170	33%
• Palm oil	640	18%
• Soya oil	560	16%
• Olive oil	547	15%

It shows the substantial added value of olive oil exported within the EU, compared to the low added value of rapeseed oil.

The largest importing countries of intra-EU exports in 2000 in terms of volume were:

Country	Volume (x1,000 tons)	Main imported products
Belgium	574	Soybean oil (39%), palm oil (31%)
France	552	Rapeseed oil (33%), palm oil (20%)
Italy	541	Olive oil (58%), rapeseed oil (23%)
United Kingdom	536	Rapeseed oil (35%), palm oil (30%)
The Netherlands	459	Rapeseed oil (59%), soybean oil (24%)
Germany	380	Rapeseed oil (31%), sunflower oil (19%)

The above-mentioned countries represented 85% of total intra-EU imports in 2000.

The Netherlands is the largest trading centre for vegetable oils in the EU. Imports from developing countries are stored in tanks in Rotterdam and re-exported to both EU and non-EU countries.
No statistics are available showing the re-exports from The Netherlands and other EU countries.

7 TRADE STRUCTURE

7.1 EU trade channels

As the EU is almost self- sufficient in the production of animal fats, furthermore imports show a declining trend, opportunities for developing countries are limited. Therefore EU trade channels as described below will focus on vegetable oils.

Trading in vegetable oils is based on forward contracts (12 months) and spot contracts (3-4 months). Paris is the main exchange for rapeseed oil, Kuala Lumpur for palm oil and Chicago for soybean oil.
Vegetable oils can also be exported unsold to, for instance, Rotterdam. On arrival, the oil is stored in tanks until a buyer is found. In this case, the buyer purchases the vegetable oil 'ex tank'.
Forward trading on the major exchanges forms an important part in the buying and selling of vegetable oils. Developments on the Chicago exchange are leading indicators in the price setting of the different vegetable oils.

Apart from palm oil, the other vegetable oils are usually shipped as 'crude' to the EU. Palm oil is often refined, bleached and deodorized in the exporting countries. The following parties are involved in the import and distribution of vegetable oils in the EU:

7.1.1 Shippers of crude and refined products

Exporters in producing countries who produce and export crude and refined product (only palm oil) to EU countries or who purchase from crude products producers to ship to EU countries.

7.1.2 Traders in crude and refined products

Traders buy and sell crude and refined products (palm oil) for their own account and re-sell/re-export these to the processing industry.

7.1.3 Brokers

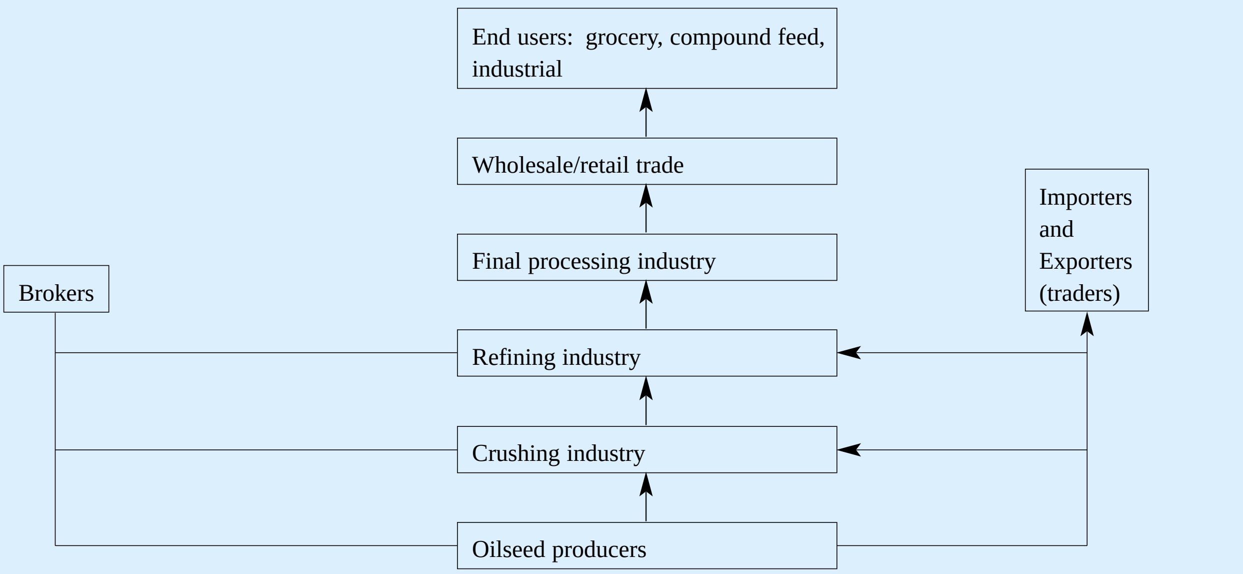
Brokers are intermediaries in the buying and selling of orders on behalf of a customer. Their income consists of a commission on the price. They do not take title to the products, nor do the products physically pass through their hands. Brokers are well-informed sources in respect to market trends, price levels and availability. Due to concentration in the sector, the number of brokers is declining.

7.1.4 Processors of crude and refined products

The processors (crushers and refiners) produce vegetable oils as ingredients for making a wide variety of end products in the grocery, compound feed and industrial sectors.
Apart from processing, multinational companies like Cargill and ADM are also actively involved in trading. Due to increasing concentration and consolidation, large processors in the EU have direct contracts with suppliers in developing countries, thereby reducing the role of middlemen like brokers and traders.

Traditional crushing and refining takes place at different locations, but the trend is to bring them closer together. Due to new technology, refiners can handle a variety of oils instead of just one.

Figure 7.1 Distribution chain for vegetable oils and fats



After refining, the vegetable oil is bottled for human consumption (cooking oil) or shipped in bulk to the final processing industry. The latter uses the refined oil in a variety of grocery, compound feed and technical products.

Rotterdam is the main trading centre for the EU vegetable oils and fats trade. From here it is distributed by vessel, inland barge or truck to storage facilities and customers.
Rotterdam is strategically located to serve continental EU countries with perfect port and infrastructural capacities, a multi- language business community and a well-established trading community.
London is the second EU port for the import of vegetable oils and fats.

7.2 Distribution channels for developing country exporters

Brokers and traders are the most suitable distribution channels for developing country exporters. They have intimate knowledge of the animal and vegetable oils and fats markets in the EU. Based on market requirements, they source their products worldwide. As Rotterdam is the most important trading centre in the EU, many traders and brokers are based in The Netherlands. Please refer to Appendix 11 for a list of brokers and traders of vegetable oils and fats.

Trade fairs are important for exporters from developing countries when they want to evaluate the market trends for end products and ingredients. They are less important as meeting point with importers and brokers. The EU Strategic Marketing Guide 'Animal and vegetable oils and fats for industrial application' and Appendix 5 of this survey provide more details on trade fairs.

Exporters of organically grown products can get themselves listed on www.green-tradenet.de a site where suppliers and purchasers come together on an open market place.

8 PRICES AND MARGINS

8.1 Prices and margins

The Chicago Board of Trade is the most important market for soybeans and oilseeds. Prices formed at this exchange largely influence prices for other crude oils and fats worldwide. Paris is the main exchange for rapeseed oil, while Kuala Lumpur is the main exchange for palm oil.

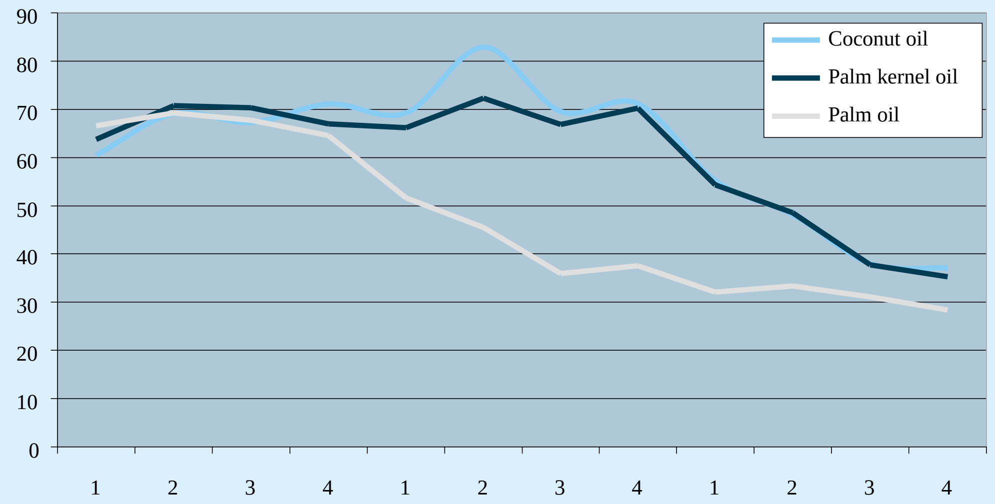
Due to improved technology, different vegetable oils and fats products are substitutable which has a major impact on price settings.

8.2 Sources of price information

Brokers and traders form the main source of price information, as they are in daily touch with the major trading centres around the world.

Two specialised trade magazines, “Oil World” and “The Public Ledger’s Commodity Week” provide extensive price information on a weekly basis. Moreover, Reuters provide on-line price information. Full addresses and contact details are mentioned in Appendix 4.

Figure 8.1 Price developments of major vegetable oils imported from developing countries, CIF Rotterdam in bulk, in US$ per 100 kg, 1998 - 2000



Source: Commodity Board MVO

9 OPPORTUNITIES FOR EXPORTERS

Opportunities for exporters in developing countries lie in the following fields:

- *Organic oils and fats*
  Although still a small segment, the market for organic ingredients is expected to grow substantially in the coming years. Growers, crushers and exporters in developing countries can distinguish themselves from the mainstream products by offering organic oils and fats to EU importers; they can have their fields and crushing facilities certified by a EU certifying organisations.
- *Specialised vegetable oils and fats for niche markets*
  Small products like jojoba oil serve specialised market segments like the aircraft industry.
  They command higher prices, as competition is less intense compared to the mainstream products.
- *Main products imported from developing countries*
  Coconut oil, palm oil and palm kernel oil.
- *Integrated chain control*
  Tracing and tracking of oils and fats for application in food products is increasingly required by food processors in the EU. Suppliers in developing countries who have a system of tracing and tracking, supported by documentation have a competitive advantage in dealing with EU importers.
- *HACCP and ISO certification*
  Suppliers who have the above-mentioned certification in the future will have a major competitive advantage, as these certifications provide guarantees on quality assurance and food safety.
- *Logistics*
  Processors/importers in the EU set high standards in respect of the logistical system of exporters.
  Suppliers of animal oils and fats from developing countries who form partnerships with strong and well-organised shippers to EU countries are in a better position to meet the requirements of customers in the EU.

Please refer also to the EU Strategic Marketing Guide Animal oils and fats for industrial application.

APPENDIX 1 NOMENCLATURE

The products in Section 2.1 have the following detailed HS (Harmonised System) codes:

HS code	Description
1501 00	**Pig fat (including lard) and poultry fat, other than that of 0209 or 1503**
1501 00 11	Pig fat (including lard) for industrial uses other than the manufacture of foodstuffs for human consumption
1501 00 19	Other
1501 00 90	Poultry fat
1502 00	**Fats of bovine animals, sheep or goats, other than those of 1503**
1502 00 10	For industrial uses other than the manufacture of foodstuffs for human consumption
1502 00 90	Other
1503 00	**Lard stearin, lard oil, oleostearin, oleo-oil and tallow oil, not emulsified or mixed or otherwise prepared**
1503 00 11	Lard stearin and oleostearin for industrial uses
1503 00 19	Other
1503 00 30	Tallow oil for industrial uses other than the manufacture of foodstuffs for human consumption
1503 00 90	Other
1504 10	**Fish-liver oils and their fractions**
1504 10 10	Of a vitamin A content not exceeding 2 500 IU/g
1504 10 91	Other, of halibut
1504 10 99	Other
1504 20	**Fats and oils and their fractions, of fish, other than liver oils**
1504 20 10	Solid fractions
1504 20 90	Other
1506 00 00	**Other animal fats and their oils and their fractions, whether or not refined, but not chemically modified**
1507	**Soya-bean oil and its fractions, whether or not refined, but not chemically modified**
1507 10	**Crude oil, whether or not degummed**
1507 10 10	For technical or industrial uses other than the manufacture of foodstuffs for human consumption
1507 10 90	Other
1507 90	**Other**
1507 90 10	For technical or industrial uses other than the manufacture of foodstuffs for human consumption
1507 90 90	Other
1508	**Ground-nut oil and its fractions, whether or not refined, but not chemically modified**
1508 10	**Crude oil**
1508 10 10	For technical or industrial uses other than the manufacture of foodstuffs for human consumption
1508 10 90	Other
1508 90	**Other**
1508 90 10	For technical or industrial uses other than the manufacture of foodstuffs for human consumption
1508 90 90	Other
1509	**Olive oil and its fractions, whether or not refined, but not chemically modified**
1509 10	**Virgin**
1509 10 10	Lampante virgin olive oil
1509 10 90	Other
1509 90 00	**Other**
1510 00	**Other oils and their fractions, obtained solely from olives, whether or not refined, but not chemically modified, including blends of these oils or fractions with oils or fractions of heading No 1509**
1510 00 10	Crude oils
1510 00 90	Other
1511	**Palm oil and its fractions, whether or not refined, but not chemically modified**
1511 10	**Crude oil**
1511 10 10	For technical or industrial uses other than the manufacture of foodstuffs for human consumption
1511 10 90	Other
1511 90	**Other**
1511 90 11	Solid fractions in immediate packing of a net content of 1 kg or less
1511 90 19	Other
1511 90 91	Other, for technical or industrial uses other than the manufacture of foodstuffs for human consumption

HS code	Description
1511 90 99	Other
1512	**Sunflower-seed, safflower or cotton-seed oil and fractions thereof, whether or not refined, but not chemically modified**
	- Sunflower-seed or safflower oil and fractions thereof:
1512 11	**Crude oil**
1512 11 10	For technical or industrial uses other than the manufacture of foodstuffs for human consumption
1512 11 91	Other sunflower-seed oil
1512 11 99	Other safflower oil
1512 19	**Other**
1512 19 10	For technical or industrial uses other than for the manufacture of foodstuffs for human consumption
1512 19 91	Other sunflower-seed oil
1512 19 99	Other safflower oil
	- Cotton-seed oil and its fractions:
1512 21	**Crude oil, whether or not gossypol has been removed:**
1512 21 10	For technical or industrial uses other than the manufacture of foodstuffs for human consumption
1512 21 90	Other
1512 29	**Other**
1512 29 10	For technical or industrial uses other than the manufacture of foodstuffs for human consumption
1512 29 90	Other
1513	**Coconut (copra), palm kernel or babassu oil and fractions thereof, whether or not refined, but not chemically modified:**
	- Coconut (copra) and its fractions:
1513 11	**Crude oil**
1513 11 10	For technical or industrial uses other than the manufacture of foodstuffs for human consumption
1513 11 91	Other in immediate packing of a net content of 1 kg or less
1513 11 99	Other
1513 19	**Other**
1513 19 11	Solid fractions in immediate packing of a net content of 1 kg or less
1513 19 19	Other
1513 19 30	Other for technical or industrial uses other than the manufacture of foodstuffs for human consumption
1513 19 91	Other in immediate packing of a net content of 1 kg or less
1513 19 99	Other
	- Palm kernel or babassu oil and fractions thereof:
1513 21	**Crude oil:**
	- For technical or industrial uses other than the manufacture of foodstuffs for human consumption:
1512 21 11	Palm kernel oil
1512 21 19	Babassu oil
1512 21 30	Other in immediate packing of a net content of 1 kg or less
1512 21 90	Other
1513 29	**Other**
1513 29 11	Solid fractions in immediate packing of a net content of 1 kg or less
1513 29 19	Other
1513 29 30	Other, for technical or industrial uses other than the manufacture of foodstuffs for human consumption
1513 29 50	Other in immediate packing of a net content of 1 kg or less
1513 29 91	Other palm kernel oil
1513 29 99	Other babassu oil
1514	**Rape, colza or mustard oil and fractions thereof, whether or not refined, but not chemically modified:**
1514 10	**Crude oil:**
1514 10 10	For technical or industrial uses other than the manufacture of foodstuffs for human consumption
1514 10 90	Other
1514 90	**Other**
1514 90 10	For technical or industrial uses other than the manufacture of foodstuffs for human consumption
1514 90 90	Other

HS code	Description
1515	**Other fixed vegetable fats and oils (including jojoba oil) and their fractions, whether or not refined, but not chemically modified:**
	- Linseed oil and its fractions:
1515 11 00	Crude oil
1515 19	**Other**
1515 19 10	For technical or industrial uses other than the manufacture of foodstuffs for human consumption
1515 19 90	Other
	- Maize (corn) oil and its fractions:
1515 21	**Other**
1515 21 10	For technical or industrial uses other than the manufacture of foodstuffs for human consumption
1515 21 90	Other
1515 29	**Other:**
1515 29 10	For technical or industrial uses other than the manufacture of foodstuffs for human consumption
1515 29 90	Other
1515 30	**Castor oil and its fractions:**
1515 30 10	For the production of aminoundecanoic acid for use in the manufacture of synthetic textile fibres or of artificial plastic materials
1515 30 90	Other
1515 40	**Tung oil and its fractions**
1515 50	**Sesame oil and its fractions:**
1515 50 11	Crude oil for technical or industrial uses other than the manufacture of foodstuffs for human consumption
1515 50 19	Other
1515 50 91	Other for technical or industrial uses other than the manufacture of foodstuffs for human consumption
1515 50 99	Other
1515 60	**Jojoba oil and its fractions**
1515 90	**Other**
1515 90 10	Oiticica oils; myrtle wax and Japan wax; their fractions
	Tobacco-seed oil and its fractions:
1515 90 21	Crude oil for technical or industrial uses other than the manufacture of foodstuffs for human consumption
1515 90 29	Other
1515 90 39	Other oils and their fractions
1516	**Animal or vegetable fats and oils and their fractions, partly or wholly hydrogenated, inter-esterified, re-esterified or elaidinised, whether or not refined, but not further prepared:**
1516 10	**Animal fats and oils and their fractions:**
1516 10 10	In immediate packings of a net content of 1 kg or less
1516 10 90	Other
1516 20	**Vegetable fats and oils and their fractions:**
1516 20 10	Hydrogenated castor oil, so called ‘opal-wax’
1516 20 91	Other, in immediate packing of a net content of 1 kg or less
1516 20 95	Other colza, linseed, rape seed, sunflower seed, illipe, karate, makore, touloucouna or babassu oils for technical or industrial uses other than the manufacture of foodstuffs for human consumption
1516 20 96	Other ground-nut, cotton seed, soya beans or sunflower seed oils; other oils containing less than 50% by weight of free fatty acids and excluding palm kernel, illipe, coconut, colza, rape seed or copaiba oils
1516 20 98	Other

APPENDIX 2 DETAILED IMPORT STATISTICS

The source of the data presented below is Eurostat COMEXT 2000.

Table 2.1 Imports of soybean oil into the EU, 1998-2000, US$ 1.000 / EUR 1,000 / tons

	1998		1999			2000		
	value US$	volume	value US$	value EUR	volume	value US$	value EUR	volume
Total	459,809	670,055	313,461	295,718	618,737	231,614	254,521	649,338
Extra-EU	3,948	4,618	2,516	2,374	3,259	3,598	3,954	8,081
Developing countries	1,929	2,938	0,537	0,507	0,803	0,265	0,291	0,374
Belgium & Luxemb.	93,124	139,462	115,570	109,028	237,359	82,808	90,998	225,402
The Netherlands	137,620	211,459	48,307	45,573	110,747	54,209	59,570	164,458
Germany	30,186	44,736	22,968	21,668	45,468	19,922	21,892	50,729
France	42,169	60,014	23,898	22,545	43,739	17,915	19,687	44,305
Austria	11,949	16,328	7,859	7,414	14,443	6,932	7,618	40,667
Denmark	21,811	33,808	16,152	15,238	31,548	10,107	11,107	26,731
Sweden	17,860	25,863	16,551	15,614	30,623	9,164	10,070	23,469
Spain	6,808	12,469	3,467	3,271	10,752	5,217	5,733	19,218
United Kingdom	57,759	64,980	26,223	24,739	38,671	8,720	9,582	17,966
Ireland	11,336	18,417	10,029	9,462	16,113	7,175	7,885	14,992
Italy	6,576	8,144	8,854	8,353	13,808	5.062	5,563	11,311
Portugal	19,176	27,299	10,989	10,367	18,589	3,430	3,769	7,852
Greece	3,341	7,010	1,773	1,673	5,059	0,738	0,811	0,374
Finland	0,095	0,066	0,819	0,773	1,818	0,215	0,236	0,342

Source : Eurostat 2000

Table 2.2 Imports of groundnut oil into the EU, 1998-2000, US$ 1,000 / EUR 1,000 / tons

	1998		1999			2000		
	value US$	volume	value US$	value EUR	volume	value US$	value EUR	volume
Total	184,439	182,640	177,733	167,673	192,894	136,079	149,537	175,498
Extra-EU	125,830	132,486	116,841	110,228	149,714	103,151	113,353	140,730
Developing countries	125,480	132,357	116,004	109,438	148,640	102,106	112,204	140,142
France	69,023	67,250	59,817	56,431	76,106	54,755	60,170	70,767
Italy	44,371	47,910	38,989	36,782	44,010	31,864	35,015	42,642
Belgium & Luxemb.	29,572	29,465	18,289	17,254	21,907	20,094	22,081	25,922
Germany	18,611	17,579	16,260	15,340	18,148	14,607	16,052	18,567
The Netherlands	13,264	12,835	16,817	15,865	20,774	7,509	8,252	10,285
United Kingdom	5,173	4,290	6,603	6,229	5,922	3,789	4,164	3,707
Austria	1,620	1,291	1,285	1,212	1,231	1,143	1,256	1,284
Portugal	0,511	0,411	1,076	1,015	3,406	0,844	0,928	0,999
Sweden	0,234	0,150	0,373	0,352	0,319	0,379	0,417	0,415
Denmark	0,585	0,478	0,395	0,373	0,427	0,274	0,301	0,310
Spain	0,401	0,272	0,278	0,264	0,220	0,277	0.304	0,268
Ireland	0,881	0,602	0,565	0,533	0,326	0,389	0,428	0,235
Finland	0,186	0,104	0,136	0,128	0,076	0,144	0,158	0,091
Greece	0,006	0,003	0,03	0,030	0,012	0.010	0,011	0,006

Source : Eurostat 2000

Table 2.3 Imports of olive oil into the EU, 1998-2000, US$ 1,000 / EUR 1,000 / tons

	1998		1999			2000		
	Value US$	volume	value US$	value EUR	volume	value US$	value EUR	volume
Total	1,461,224	667,549	1,743,087	1,644,422	711,367	1,234,204	1,356,268	655,540
Extra-EU	190,415	116,550	437,138	412,394	218,130	182,391	200,430	108,321
Developing countries	189,844	116,434	436,353	411,654	217,738	181,700	199,670	107,910
Italy	873,181	422,946	940,079	887.539	398,163	718,258	789,294	411,712
France	188,068	77,940	221,657	209,110	79,788	171,141	188,067	82,707
United Kingdom	85,033	29,132	94,786	89,421	31,871	83,939	92,241	43,937
Portugal	93,022	48,534	96,694	91,221	40,816	62,878	69,097	37,526
Germany	82,550	27,240	103,709	97,839	34,966	80,006	87,919	31,816
Spain	48,124	31,612	187,101	176,510	95,391	24,477	26,898	13,496
Belgium & Luxemb.	27,397	9,583	36,286	34,232	11,853	31,228	34,316	12,922
The Netherlands	17,274	6,266	21,091	19,897	7,396	19,100	20,989	7,950
Austria	10,039	3,185	10,399	9,810	3,025	12,455	13,687	4,391
Sweden	12,010	2,891	13,511	12,746	3,239	10,097	11,096	3,226
Denmark	8,474	2,665	7,350	6,934	1,968	6,924	7,609	2,336
Ireland	4,024	1,548	4,560	4,302	1,405	4,769	5,241	1,562
Greece	9,720	3,400	2,673	2,522	0,763	6,860	7,539	1,238
Finland	2,287	0,607	2,479	2,339	0,723	2,070	2,275	0,721

Source : Eurostat 2000

Table 2.4 Imports of palm oil into the EU, 1998-2000, US$ 1,000 / EUR 1,000 / tons

	1998		1999			2000		
	Value US$	volume	value US$	value EUR	volume	value US$	value EUR	volume
Total	1,617,482	2,489,005	1,259,962	1,188,643	2,452,820	942,032	1,035,200	2,637,608
Extra-EU	1,226,984	2,019,857	880,713	830,861	1,855,635	656,734	721,686	1,996,490
Developing countries	1,221,389	2,009,758	863,549	814,669	1,818,522	648,854	713,027	1,972,532
The Netherlands	474,059	761,412	347,718	328,036	711,665	199,319	219,032	600,162
United Kingdom	221,920	372,084	204,582	193,002	463,337	167,604	184,180	552,357
Germany	301,956	475,839	212,881	200,831	415,517	176,580	194,044	504,710
Italy	151,059	227,525	125,437	118,337	229,004	105,777	116,239	258,403
Belgium & Luxmb.	109,445	161,540	114,011	107,558	194,914	99,057	108,854	258,302
Spain	80,143	127,676	62,098	58,583	128,287	49,426	54,314	142,030
France	95,772	108,271	78,187	73,762	112,640	59,531	65,419	124,321
Denmark	70,959	107,724	41,514	39,164	80,891	33,446	36,754	86,097
Greece	22,292	33,489	12,732	12,012	24,318	10,994	12,081	27,867
Portugal	18,071	27,664	15,052	14,200	27,275	10,509	11,548	26,159
Ireland	13,908	8,267	13,580	12,811	17,828	11,049	12,142	18,008
Austria	14,739	18,005	11,144	10,513	16,534	7,691	8,452	14,339
Sweden	31,233	44,397	14,029	13,235	20,918	5,517	6,063	14,149
Finland	11,924	15,112	6,995	6,599	9,692	5,531	6,078	10,704

Source : Eurostat 2000

Table 2.5 Imports of sunflower oil into the EU, 1998-2000, US$ 1,000 / EUR 1,000 / tons

	1998		1999			2000		
	Value US$	volume	value US$	value EUR	volume	value US$	value EUR	volume
Total	362,065	503,821	299,322	282,379	537,989	200,215	220,017	439,941
Extra-EU	137,763	195,167	118,378	111,677	244,562	52,209	57,372	131,648
Developing countries	122,801	172,168	104,858	98,923	222,267	39,147	43,019	100,251
United Kingdom	18,603	21,268	18,516	17,468	26,666	43,343	47,630	97,513
Germany	69,148	89,608	62,451	58,916	97,397	48,680	53,494	94,513
The Netherlands	90,385	127,844	100,348	94,668	197,248	36,441	40,045	82,538
France	97,755	138,788	46,017	43,412	89,431	32,160	35,341	75,199
Italy	24,248	33,039	20,101	18,963	38,114	11,438	12,569	30,168
Belgium & Luxemb.	21,155	30,414	10,652	10,049	16,474	10,836	11,908	26,303
Spain	9,644	13,214	16,271	15,350	32,261	3,869	4,252	9,162
Portugal	15,114	29,578	10,365	9,778	16,940	4,120	4,527	8,195
Austria	3,384	5,304	0,616	0,581	0,512	3,143	3,454	6,403
Ireland	1,924	1,504	1,258	1,187	1,126	2,290	2,516	2,474
Sweden	1,763	1,702	2,175	2,052	2,672	1,550	1,703	2,334
Greece	7,056	9,671	9,145	8,627	17,499	0,870	0,956	2,019
Denmark	1,846	1,859	0,943	0,890	0,955	0,881	0,968	1,478
Finland	0,040	0,028	0,464	0,438	0,694	0,595	0.654	1,189

Source : Eurostat 2000

Table 2.6 Imports of rapeseed oil into the EU, 1998-2000, US$ 1,000 / EUR / tons

	1998		1999			2000		
	Value US$	volume	value US$	value EUR	volume	value US$	value EUR	volume
Total	725,193	1,036,076	548,579	517,527	1,050,787	468,047	514,337	1,185,037
Extra-EU	3,453	4,336	5,599	5,282	6,936	2,164	2,378	4,059
Developing countries	2,762	3,227	0,071	0,067	0,088	0	0	0
The Netherlands	224,651	356,189	143,278	135,168	312,185	93,290	102,516	280,940
United Kingdom	99,173	97,221	107,703	101,607	188,435	80,957	88,964	191,192
France	78,152	115,369	65,124	61,438	115,994	76,395	83,950	183,100
Italy	32,988	54,305	39,378	37,149	79,435	47,906	52,644	124,037
Germany	42,203	60,828	28,319	26,716	51,911	46,018	50,569	120,548
Belgium & Luxemb	99,471	151,327	49,407	46,610	113,133	38,026	41,787	104,087
Sweden	40,421	53,361	32,370	30,538	56,278	24,754	27,202	52,354
Denmark	37,001	55,362	23,671	22,331	39,094	18,983	20,861	43,826
Ireland	24,996	29,849	22,683	21,399	31,994	17,871	19,639	32,039
Austria	19,322	27,947	15,543	14,663	26,783	9,889	10,867	23,650
Spain	9,845	14,233	10,984	10,362	22,254	7,176	7,886	19,001
Finland	11,988	13,065	8,113	7,654	10,323	5,974	6,565	9,155
Portugal	1,437	2,124	0,623	0,588	0,688	0,716	0,787	0,966
Greece	3,545	3,227	1,382	1,304	2,280	0,091	0,100	0,142

Source : Eurostat 2000

Table 2.7 Imports of coconut oil into the EU, 1998-2000, US$ 1,000 / EUR 1,000 / tons

	1998		1999			2000		
	Value US$	volume	value US$	value EUR	volume	value US$	value EUR	volume
Total	576,261	893,147	430,484	406,117	574,873	372,393	409,224	706,606
Extra-EU	534,181	836,567	392,273	370,069	530,795	350,140	384,769	670,488
Developing countries	534,094	836,432	392,183	369,984	530,673	350,140	384,769	670,488
Germany	222,711	335,275	137,167	129,403	184,096	156,625	172,115	295,688
The Netherlands	201,811	328,684	162,587	153,384	221,523	92,255	104,676	191,744
Belgium & Luxemb.	26,748	42,002	24,980	23,566	34,832	33,680	37,011	60,912
Italy	33,581	51,928	21,635	20,410	28,967	22,708	24,954	42,963
Spain	25,520	41,148	19,017	17,941	26,162	22,595	24,830	42,150
United Kingdom	26,177	35,572	30,196	28,487	37,772	15,923	17,498	29,862
France	14,914	22,958	15,211	14,350	20,335	12,142	13,343	22,272
Sweden	7,778	10,425	10,330	9,746	10,951	7,065	7,764	10,392
Denmark	6,111	9,518	3,637	3,431	3,400	2,545	2,797	4,621
Portugal	4,927	6,997	1,662	1,568	2,053	1,483	1,630	2,488
Finland	1,549	2,081	1,670	1,198	1,549	1,253	1,377	2,071
Ireland	0,791	0,885	0,718	0,677	0,762	0,850	0,935	1,063
Austria	3,817	5,478	2,063	1,946	2,467	0,264	0,290	0,379
Greece	0,124	0,196	0,011	0,010	0,004	0,003	0,004	0,001

Source : Eurostat 2000

Table 2.8 Imports of palm kernel oil into the EU, 1998-2000, US$ 1,000 / EUR 1,000 / tons

	1998		1999			2000		
	Value US$	volume	value US$	value EUR	volume	value US$	value EUR	volume
Total	195,220	295,517	276,423	260,776	404,091	189,696	208,457	364,028
Extra-EU	171,167	262,253	250,134	235,975	362,606	181,035	198,940	343,853
Developing countries	171,160	262,253	250,134	235,975	362,606	181,035	198,940	343,853
Germany	68,803	105,838	146,835	138,524	206,755	95,896	105,380	177,573
United Kingdom	43,096	63,908	46,980	44,321	80,328	19,933	21,904	47,085
Belgium & Luxemb.	7,924	11,786	10,417	9,827	14,402	23,839	26,197	43,758
Spain	16,519	25,276	18,425	17,382	26,895	17,200	18,901	32,018
Italy	9,668	14,170	15,754	14,863	22,825	14,091	15,485	26,283
The Netherlands	33,042	50,817	21,412	20,200	29,536	8,404	9,235	17,553
Denmark	4,436	6,627	5,212	4,917	7,104	3,733	4,103	7,499
France	6,646	9,949	5,489	5,177	8,038	2,273	2,498	4,179
Austria	2,103	2,541	2,857	2,695	3,885	1,706	1,875	3,291
Greece	1,982	2,903	1,874	1,768	2,630	1,868	2,053	3,364
Portugal	0,700	1,067	0,859	0,810	1,136	0,550	0,604	1,002
Ireland	0,280	0,618	0,279	0,263	0,533	0,175	0,192	0,393
Finland	0,016	0,015	0,020	0,018	0,020	0,025	0,028	0,029
Sweden	0,005	0,002	0,012	0,011	0,004	0,001	0,002	0,001

Source : Eurostat 2000

Table 2.9 Imports of others (castor oil, sesame oil, cottonseed oil, corn oil) into the EU, 1998-2000, US$ 1,000 / EUR 1,000 / tons

	1998		1999			2000		
	value US$	volume	value US$	value EUR	volume	value US$	value EUR	volume
Total	601,810	561,674	499,122	470,870	500,274	472,388	519,108	584,815
Extra-EU	278,221	272,029	193,9191	182,942	185,604	253,522	278,596	307,731
Developing countries	120,661	110,004	102,698	96.885	93,826	149,072	163,815	150,409
Italy	111,394	117,937	98,348	92,781	113,906	96,371	105,911	163,434
France	114,620	119,514	103,286	97,440	114,271	120,827	132.777	131,780
Germany	74,169	49,513	74,039	69,848	57,394	77,511	85,177	79,821
The Netherlands	73,341	68,160	60,182	56,776	65,626	45,992	50,541	50,830
Spain	74,991	89,719	20,702	19,531	24,512	29,496	32,413	46,623
Belgium & Luxemb.	32,328	30,353	33,923	32,003	39,477	23,162	25,453	36,207
Greece	27,007	29,550	20,640	19,472	25,979	12,893	14,169	22,409
United Kingdom	39,404	14,965	43,307	40,856	19,328	30,597	33,623	16,497
Sweden	18,566	13,663	15,306	14,440	14,432	12,938	14,218	12,962
Austria	12,062	10,330	10,859	10,244	10,456	8,722	9,585	11,583
Denmark	11,734	9,428	10,196	9,619	8,770	8,034	8,829	8,261
Finland	4,842	2,323	3,460	3,264	1,887	2,572	2,827	1,966
Ireland	4,555	3,357	3,156	2,977	2,416	2,371	2,606	1,661
Portugal	2,793	2,862	1,716	1,619	1,820	0,891	0,979	1,112

Source : Eurostat 2000

APPENDIX 3 STANDARD ORGANISATIONS

INTERNATIONAL
International Standardisation Institute (ISO)

Address:	P.O. Box 56, CH-1211 Geneva, Switzerland
Telephone:	+ 41 (0)22 7490111
Fax:	+ 41 (0)22 7333430
E-mail:	central@iso.ch
Internet:	www.iso.ch

EUROPEAN UNION
Comité Européen de Normalisation (CEN)
European Normalisation Committee

Address:	Third countries Unit, Rue de Stassart 36, B-1050 Brussels, Belgium
Telephone:	+ 32 (0)2 5500811
Fax:	+ 32 (0)2 5500819
E-mail:	infodesk@cenorm.be
Internet:	www.cenorm.be

SGS European Quality Certification Institute E.E.S.V.

Address:	P.O. Box 200, 3200 AE Spijkenisse, The Netherlands
Telephone:	+ 31 (0) 181-693750
Fax:	+ 31 (0) 181-693582

FRANCE
Association Française de Normalisation (AFNOR)

Address:	Tour Europe, 92049 Paris La Défense Cedex, France
Telephone:	+ 33 (0)1 42915555
Fax:	+ 33 (0)1 42915656
Internet:	www.afnor.fr

GERMANY
Deutsches Institut für Normung eV (DIN)

Address:	Burggrafenstrasse 4-10, 10772 Berlin, Germany
Telephone:	+ 49 (0)30 2601 0
Fax:	+ 49 (0)30 2601 1231
E-mail:	postmaster@din.de
Internet:	www.din.de

RAL Deutsches Institut für Gütesicherung und Kennzeichnung e.V.

Address:	Siegburger Straße 39, 53757 Sankt Augustin, Germany
Telephone:	02241/1605-0
Fax:	02241/1605-11
E-mail:	RAL-Institut@t-online.de
Internet:	www.ral.de

ITALY
Ente Nazionale Italiano di Unificazione (UNI)

Address:	Via Battinotti Stassi 11A, 20100 Milan, Italy
Telephone:	+ 39 02 700241
Fax:	+ 39 02 70106106
E-mail:	uni@uni.com
Internet:	www.unicei.it

THE NETHERLANDS
Nederlands Normalisatie Instituut (NNI)
Netherlands Standardisation Institute

Address:	P.O.Box 5059, 2600 GB Delft, The Netherlands
Telephone:	+ 31 (0)15 2690390
Fax:	+ 31 (0)15 2690190
E-mail:	info@nni.nl
Internet:	www.nni.nl

UNITED KINGDOM
British Standards Institution (BSI)

Address:	British Standards House, 389 Chiswick High Road, London W4 4AL, United Kingdom
Telephone:	+ 44 (0)208 996 90 00
Fax:	+ 44 (0)208 996 74 00
E-mail:	info@ bsi.org.uk
Internet:	www.bsi.org.uk

BM TRADA Certification Limited

Address:	Hughenden Valley, High Wycombe, Bucks HP14 4NR. United Kingdom
Telephone:	+ 44 (0)1494 569700
Fax:	+ 44 (0)1494 565487
E-mail:	enquiries@bmtrada.com
Internet:	www.bmtrada.com

APPENDIX 4 SOURCES OF PRICE INFORMATION

ISTA Mielke & Co
Address: Langenberg 25, 21077 Hamburg, Germany
Telephone: + 49 (0)40 7610500
Fax: + 49 (0)40 76105090
E-mail: info@oilworld.de
Internet: www.oilworld.de

Publishes: "Oil World Weekly", "Oil World Monthly" and "Oil World Annual"; average wholesale prices in European and USA markets on a weekly, monthly and annual basis. Statistics, supply and demand forecasts and price developments

The Public Ledger
Address: 80 Calverley Road, Tunbridge Wells, Kent TN1 2UN, United Kingdom
Telephone: + 44 (0) 1892 533813
Fax: + 44 (0) 1892 544895
E-mail: marketing@public-ledger.com
Internet: www.public-ledger.com

Publishes "The Public Ledger"; average wholesale prices in the UK and major European markets on a weekly and monthly basis. Online price information available.

FAO (Food and Agriculture Organization)
Address: Via delle Terme di Caracalla, 00100 Rome, Italy
Telephone: + 39 (0) 6 57051
Fax: + 39 (0) 6 57053152
E-mail: publication-sales@FAO.org
Internet: www.fao.org

Publishes "Commodity and Market review"

Reuters Nederland BV
Address: Drentestraat 11, 1083 HK Amsterdam, The Netherlands
Telephone: + 31 (0)20 504 5045
Fax: + 31(0)20 504 5050
E-mail: eric.boer@reuters.com
Internet: www.reuters.com

Publishes "Grain & Oil Seeds" and "Livestock". Online publications available.

APPENDIX 5 TRADE ASSOCIATIONS

INTERNATIONAL
Federation of Oils, Seeds and Fats Associations Ltd. (FOSFA)
Address: 20, St Dunstan Hill, London EC3R 8NQ, United Kingdom
Telephone: + 44 (0)20 7 283 5511/2707
Fax: + 44 (0)20 7 623 1310
E-mail: contact@fosfa.org
Internet: www.fosfa.org

EUROPEAN
Federation of Seed Crushers and Oil Processors (FEDIOL)
Address: Ave. de Tervuren 168, Box 12, 1150 Brussels
Telephone: + 32 (0)2 771 53 30
Fax: + 32 (0)2 771 38 17
E-mail: fediol@fediol.be

THE NETHERLANDS
Oils, Fats and Oilseeds Brokers' Association (OFOBA)
Address: P.O. Box 190, 3000 AD Rotterdam
Telephone: + 31 (0)10 4042111
Fax: + 31 (0)10 4042333

Netherlands Oils, Fats & Oilseeds Trade Association (NOFOTA)
Address: P.O. Box 202, 3000 AE Rotterdam
Telephone: + 31 (0)10 4430622
Fax: + 31 (0)10 4678761
E-mail: info@nofota.com

Vereniging Nederlandse Fabrikanten van Eetbare Olien en Vetten (VERNOF)
(Association of Dutch Seed Crushers and Oil Processors)
Address: P.O.Box 3095, 2280 GB Rijswijk
Telephone: + 31 (0)70 3905263
Fax: + 31 (0)70 3191329
E-mail: secretariaat@vernof.nl

FRANCE
Syndicat National du Commerce des Céréales, Graines, Légumes Secs, Produits Oléagineux et Dérivés
Address: 171, Bourse de Commerce, F-75040 Paris Cedex 1,
Telephone: + 33 (0)1 42 335300
Fax: + 33 (0)1 42 360494

Syndicat Général des Fabricants d'Huile et de Tourteaux de France (SGFHTF)
Address: 118, Avenue Achille Peretti, F-92200 Neuilly sur Seine, France
Telephone: + 33 (0)1 46372206
Fax: + 33 (0)1 46371560
E-mail: huilerie@fncg.fr

BELGIUM
UCOGRAS
Address: Borzestraat 29, B-2000 Antwerp, Belgium
Telephone: + 32 (0)3 2334393
Fax: + 32 (0)3 2333460

Federatie van Belgische Fabrikanten van Vetten en Olien (FBVO)
(Federation of Belgian Processors of Fats and Oils)
Address: 168, Avenue de Tervueren (bte.12), B-1150 Brussels, Belgium
Telephone: + 32 (0)2 7715330
Fax: + 32 (0)2 771 3817
E-mail: fbvo@fediol.be

GERMANY
Deutscher Verband des Grosshandels mit Ölen, Fetter und Ölrohstoffen (GROFOR)
Address: Adolphsplatz 1, Kontor 24, D-20457 Hamburg, Germany
Telephone: + 49 (0)40 3698790
Fax: + 49 (0)40 36987920

Verband Deutscher Oelmühlen
Address: Am Weidendamm 1A, 10117 Berlin, Germany
Telephone: + 49 (0)30 72625 900
Fax: + 49 (0)30 72625 999
E-mail: info@oelmuehlen.de

ITALY
Federazione Nazionale del Commercio Oleano
Address: Via della Concie 20, I-00154 Rome, Italy
Telephone: + 39 06 5754201
Fax: + 39 06 5781813

Associazione Italiana dell Industria Olearia (ASSITOL)
Address: Piazza di Campitelli 3, I- 00186 Roma, Italy
Telephone: + 39 06 699 40058
Fax: + 39 06 699 40118
E-mail: assitol@foodarea.it

Associazione GRANARIA di Milano
Address: Viale Milano-Fiori, Strada no. 7, Palazzo S1, 20089 Rozzano (Milano), Italy
Telephone: + 39 02 8243184
Fax: + 39 02 89200247

UNITED KINGDOM
Seed Crushers and Oil Processors' Association (SCOPA)
Address: 6 Catherine Street, London WC2B 5JJ, United Kingdom
Telephone: + 44 (0) 207 8362460
Fax: + 44 (0) 207 879 57 35
E-mail: angela.bowden@fdf.org.uk

SPAIN

Federación de Asociaciones Molturadores y Refinadores de Aceites Vegetales del Reino de Espania

Address:	Principe de Vergara 80, E-28006 Madrid, Spain
Telephone:	+ 34 (0)91 563 1038
Fax:	+ 34 (0)91 562 1424
E-mail:	afoex@fiab.es

APPENDIX 6 TRADE FAIR ORGANISERS

GERMANY

Anuga

Frequency: biennial (2003 Cologne)
Address: Köln Messe, Messeplatz 1, 50679 Cologne, Germany
Telephone: + 49 (0) 221 821 0
Fax: + 49 (0) 221 821 2574
E-mail: anuga@koelnmesse.de
Internet: www.koelnmesse.de/anuga

Food and beverages

Bio Fach

Frequency: annual (Nurnberg)
Address: Industriestrasse 12, 91186 Büchenbach, Germany
Telephone: + 49 (0) 91 714011
Fax: + 49 (0) 91 714016
E-mail: info@biofach.de
Internet: www.biofach.de

Certified organic food and beverages

FRANCE

SIAL

Frequency: biennial (2002 Paris)
Address: 1 Rue du Parc, 92593 Levallois-Perret, France
Telephone: + 33 (0) 1 49 68 54 99
Fax: + 33 (0) 1 47 31 37 82
E-mail: info@sial.fr
Internet: www.sial.fr

Food and beverages

Health Ingredients Europe

CMP Information.

Frequency: biennial (alternate with Food Ingredients Europe)
Address: P.O.Box 200, 3600 AE Maarssen
Telephone: + 31 (0)346 55 94 44
Fax: + 31 (0)346 57 38 11
E-mail: fi@cmpinformation.com
Internet: www.fi-events.com

Food ingredients, semi finished products, product development and quality control

UNITED KINGDOM

Food Ingredients Europe

CMP Information.

Frequency: biennial (alternates with Health Ingredients Europe; 2002 Paris)
Address: P.O.Box 200, 3600 AE Maarssen
Telephone: + 31 (0)346 55 94 44
Fax: + 31 (0)346 57 38 11
E-mail: fi@cmpinformation.com
Internet: www.fi-events.com

Ingredients for health, functional and organic foods

IFE

Frequency: biennial
Address: 11 Manchester Square, London W1M 5AB, United Kingdom
Telephone: + 44 (0)20 7886 3100
Fax: + 44 (0)20 7886 3031
E-mail: ife@freshrm.co.uk
Internet: www.ife99.com

Food and beverages

THE NETHERLANDS

Natural Products Expo Europe

Penton Media Europe Ltd

Frequency: annual (Amsterdam)
Address: 61 Southwark Street, London SE1 0HL, United Kingdom
Telephone: + 44 (0)20 7620 0001
Fax: + 44 (0)20 7401 3966
E-mail: katharine.tooby@pentoneurope.com
Internet: www.expoeurope.com

Organic and natural food and beverages and food supplements

ITALY

Sana

Fiere e Comunicazioni

Frequency: biennial (2002 Bologna)
Address: Illaria Borri, Via San Vittore 14, I-20123 Milan, Italy
Telephone: + 39 02 86 45 10 78
Fax: + 39 02 86 45 35 06
E-mail: info@sana.it
Internet: www.sana.it

Health and nutritional products; environment-friendly agriculture

APPENDIX 7 TRADE PRESS

INTERNATIONAL

Ista Mielke GmbH

Address: Langenberg 25, 21077 Hamburg, Germany
Telephone: + 49 (0)40 7610500
Fax: + 49 (0)40 76105090
E-mail: info@oilworld.de
Internet: www.oilworld.de

Publishes “Oil World Weekly”, “Oil World Monthly” and “Oil World Annual”

THE NETHERLANDS

Commodity Board for Margarine, Oils and Fats

Address: P.O.Box 3095, 2280 GB Rijswijk, The Netherlands
Telephone: + 31 (0)70 319 51 95
Fax: + 31 (0)70 319 51 96
E-mail: produktschap@mvo.agro.nl
Internet: www.agro.nl/mvo

Publishes “MVO Magazine” on a weekly basis

UNITED KINGDOM

The Public Ledger

Address: 80 Calverly Road, Turnbridge Wells, Kent TN1 2UN, United Kingdom
Telephone: + 44 (0)1892 53 38 13
Fax: + 44 (0)1892 54 48 95
E-mail: marketing@public-ledger.com
Internet: www.public-ledger.com

Publishes “The Public Ledger” on a weekly + monthly basis

DMG World Media (UK) Ltd.

Address: Queensway House, 2 Queensway, Redhill, Surrey RH1 1QS, United Kingdom
Telephone: + 44 (0)1737 76 86 11
Fax: + 44 (0)1737 85 54 70
E-mail: oilsand fats@uk.dmgworldmedia.com
Internet: www.oilsand fatsinternational.com

Publishes “Oil & Fats International” on a weekly basis

APPENDIX 8 BUSINESS SUPPORT ORGANISATIONS

INTERNATIONAL
International Trade Centre UNCTAD/WTO (ITC)

Address:	Palais des Nations, P.O. Box 10, 1211 Geneva 10, Switzerland
Telephone:	(41) 22-7300111
Fax:	(41) 22-7334439
E-mail:	itcreg@intracen.org
Internet:	www.intracen.org

AUSTRIA
Austrian Federal Economic Chamber

Address:	P.O. Box 150, A-1045 Vienna, Austria
Telephone:	+ 43 (0)1 501050
Fax:	+ 43 (0)1 50105-150
E-mail:	aw-online@aw.wk.or.at
Internet:	www.wk.or.at/aw/aw_intl/index.htm

DENMARK
Danish Import Promotion Office for Products from Developing Countries (DIPO)

Address:	Danish Chamber of Commerce, Børsen, 1217 Copenhagen , Denmark
Telephone:	+ 45 (0)33 950541
Fax:	+ 45 (0)33 120525
E-mail:	dipo@commerce.dk
Internet:	www.dipo.dk

Germany
BfAI, Federal Office of Foreign Trade Information

Address:	Agrippastrasse 87-93, P. O. Box 100522, 50455 Cologne, Germany
Telephone:	+ 49 (0)221 2057-0
Fax:	+ 49 (0)221 2057-212
E-mail:	bus.contacts@bfai.com
Internet:	www.bfai.com

ITALY
ICE
Italian National Institute for Foreign Trade

Address:	Via Liszt 21, 00144 Rome, Italy
Telephone:	+ 39 06 59921
Fax:	+ 39 0659926900
E-mail:	ice@ice.it
Internet:	www.ice.it

THE NETHERLANDS
CBI, Centre for the Promotion of Imports from developing countries

Address:	P.O. Box 30009, 3001 DA Rotterdam, The Netherlands
Telephone:	+ 31 (0)10 2013434
Fax:	+ 31 (0)10 4114081
E-mail:	cbi@cbi.nl
Internet:	www.cbi.nl

NORWAY
Norwegian Agency for Development Co-operation (Norad)

Address:	Tolbugaten 31, P.O. Box 8034 Deo, Oslo, Norway
Telephone:	+ 41 (0)22 242030
Fax:	+ 41 (0)22 242031
Internet:	www.norad.no

SWEDEN
Swedish International Development Co-operation Agency - Department for Infrastructure & Economic Co-operation (SIDA)

Address:	Sveavägen 20, S-105 25 Stockholm, Sweden
Telephone:	+ 46 (0)8 6985000
Fax:	+ 46 (0)8 6208864
E-mail:	sida@sida.org.se
Internet:	www.sida.se

SWITZERLAND
SIPPO, Swiss Import Promotion Programme

Address:	Avenue de l'Avant-Poste 4, CH-1001 Lausanne, Switzerland
Telephone:	+ 41 (0)21 320 32 31
Fax:	+ 41 (0)21 320 73 37
E-mail:	info@sippo.ch
Internet:	www.sippo.ch

APPENDIX 9 OTHER USEFUL ADDRESSES

INTERNATIONAL

International Chamber of Commerce

Address: 38, Cours Albert 1er, 75008 Paris, France
Telephone: + 33 (0)1 49 53 28 28
Fax: + 33 (0)1 49 53 29 42
E-mail: icc@iccwbo.org
Internet: www.iccwbo.org

IFOAM (International Federation of Organic Agricultural Movement)

Address: Bldg. 20, 8801 East Saanich Road, Sidney BC, V8L 1H3, Canada
Telephone: + 1 (0)250 655 5662
Fax: + 1 (0)250 655 5657
E-mail: ifoam2002@cog.ca
Internet: www.cog.ca/ifoam2002

FAO

Address: Ville delle Terme di Caracalla, 00100 Rome, Italy
Telephone: + 39 06 57054778
Fax: + 39 06 57052151
E-mail: info@fao.org
Internet: www.fao.org

UNCTAD

(United Nations Conference on Trade and Development)

Address: Palais des Nations, CH-1211 Geneva, Switzerland
Telephone: + 41 (0)22 90712 34
Fax: + 41 (0)22 9070043
E-mail: ers@unctad.org
Internet: www.unctad.org

EUROPE

Contact point EU ECO-label

Commission of the European Communities
Address: DG XI-E4, Rue de la Loi 200, 1049 Brussels, Belgium
Telephone: + 32 (0)2 2990324
Fax: + 32 (0)2 2955684
Internet: www.europa.eu.int/ecolabel

GERMANY

Ecocert International (Certification organisation for organic products)

Address: Foerster Strasse 87, D-37520 Osterode-Förste, Germany
Telephone: + 49 (0)5522 951 161
Fax: + 49 (0)5522 951 164
E-mail: info@ecocert.de
Internet: www.ecocert.com

THE NETHERLANDS

CBI/Accesguide

(CBI's database on European non-tariff trade barriers)
Address: P.O. Box 30009, 3001 DA Rotterdam, The Netherlands
Telephone: + 31 (0)10 2013434
Fax: + 31 (0)10 4114081
Email: accessguide@cbi.nl
Internet: www.cbi.nl/accessguide

SKAL (Certification organisation for organic products)

Address: P.O. Box 384, 8000 AJ Zwolle, The Netherlands
Telephone: + 31 (0)38 4268181
Fax: + 31 (0)38 4213063
E-mail: info@skal.com
Internet: www.skal.com

UNITED KINGDOM

Soil Association Certification Ltd (Certification organisation for organic products)

Address: Bristol House, 40-56 Victoria Street, Bristol, Avon BS1 6BY, United Kingdom
Telephone: + 44 (0)117 929 0661
Fax: + 44 (0)117 925 2504
E-mail: info@soilassociation.org
Internet: www.soilassociation.org

APPENDIX 10 LIST OF DEVELOPING COUNTRIES

Please note that the OECD list of developing countries, as applied in this market survey, may include countries that are usually not considered as developing countries (e.g. South Korea)

Afghanistan
Albania
Algeria
Angola
Anguilla
Antigua and Barbuda
Argentina
Armenia
Aruba
Azerbaijan
Bahrain
Bangladesh
Barbados
Belize
Benin
Bhutan
Bolivia
Bosnia & Herzegovina
Botswana
Brazil
Burkina Faso
Burundi
Cambodia
Cameroon
Cape Verde
Central African rep.
Chad
Chile
China
Colombia
Comoros
Congo
Cook Islands
Costa Rica
Côte d'Ivoire
Croatia
Cuba
Djibouti
Dominica
Dominican republic
Ecuador
Egypt
El Salvador
Equatorial Guinea
Eritrea
Ethiopia
Fiji
French Polynesia
Gabon
Gambia
Georgia
Ghana
Gibraltar
Grenada
Guatemala
Guinea
Guinea-Bissau
Guyana
Haiti
Honduras
India
Indonesia
Iran
Iraq
Jamaica
Jordan
Kazakstan
Kenya
Kiribati
Korea, Rep. of
Korea, South
Kyrghyz Rep.
Laos
Lebanon
Lesotho
Liberia
Libya
Macao
Macedonia
Madagascar
Malawi
Malaysia
Maldives
Mali
Malta
Marshall Islands
Mauritania
Mauritius
Mayotte
Mexico
Micronesia, Fed. States
Moldova
Mongolia
Montserrat
Morocco
Mozambique
Myanmar
Namibia
Nauru
Nepal
Netherlands Antilles
New Caledonia
Nicaragua
Niger
Nigeria
Niue
Northern Marianas
Oman
Pakistan
Palau Islands
Palestinian Admin. Areas
Panama
Papua New Guinea
Paraguay
Peru
Philippines
Rwanda
São Tomé & Principe
Saudi Arabia
Senegal
Seychelles
Sierra Leone
Slovenia
Solomon Islands
Somalia
South Africa
Sri Lanka
St. Helena
St. Kitts-Nevis
St. Lucia
St. Vincent and Grenadines
Sudan
Surinam
Swaziland
Syria
Tajikistan
Tanzania
Thailand
Timor
Togo
Tokelau
Tonga
Trinidad & Tobago
Tunisia
Turkey
Turkmenistan
Turks & Caicos Islands
Tuvalu
Uganda
Uruguay
Uzbekistan
Vanuatu
Venezuela
Vietnam
Virgin Islands (UK)
Wallis & Futuna
Western Samoa
Yemen
Yugoslavia, Fed. Rep.
Zaire
Zambia
Zimbabwe

Note: Eurostat figures do not include figures of Cook Islands, Niue, St. Kitts-Nevis, Timor and Tokelau

Countries falling under the groups mentioned in Section 1.2 of the EU Strategic Marketing Guide “Animal and vegetable oils and fats”.

LDC, Andes group and Central American Common Market
Afghanistan, Angola, Bangladesh, Burkina Faso, Burundi, Benin, Bhutan, Congo, Central African Republic, Cape Verde, Djibouti, Eritrea, Ethiopia, Gambia, Guinea, Equatorial Guinea, Guinea-Bissau, Haiti, Cambodia, Kiribati, Comoros (excl. Mayotte), Laos, Liberia, Lesotho, Madagascar, Mali, Myanmar, Mauritania, Maldives, Malawi, Mozambique, Niger, Nepal, Rwanda, Salomon Islands, Sudan, Sierra Leone, Somalia, Sao Tomé & Principe, Chad, Togo, Tuvalu, Tanzania, Uganda, Vanuatu, Samoa, Yemen, Zambia.

SPGE
Bolivia, Colombia, Costa Rica, Ecuador, Guatemala, Honduras, Nicaragua, Panama, Peru, El Salvador, Venezuela

SPGI
United Arab Emirates, Antigua and Barbuda, Anguilla, Armenia, Netherlands Antilles, Antarctica, Argentina, American-Samoa, Aruba, Azerbaijan, Barbados, Bahrain, Bermuda, Brunei, Brazil, Bahamas, Bouvet Island, Botswana, Belarus, Belize, Cocos Islands, Congo (Republic), Ivory Coast, Cook Islands, Chile, Cameroon, China, Cuba, Christmas Island, Cyprus, Dominica, Dominican Republic, Algeria, Egypt, Fiji, Falkland Islands, Micronesia, Gabon, Grenada, Georgia, Ghana, Gibraltar, Greenland, South Georgia and the South Sandwich Islands, Guam, Guyana, Heard and McDonald Islands, Indonesia, India, British Oceania, Iraq, Iran, Jamaica, Jordan, Kenya, Kyrgyz Republic, St. Kitts-Nevis, Kuwait, Cayman Islands, Kazakhstan, Lebanon, St. Lucia, Sri Lanka, Libya, Morocco, Moldavia, Marshall Islands, Mongolia, Macao, Montserrat, Mauritius, Mexico, Malaysia, Namibia, New Caledonia, Norfolk, Nigeria, Nauru, Niue Island, Oman, French Polynesia, Papua-New-Guinea, Philippines, Pakistan, St Pierre and Miquelon, Pitcairn, Palau, Paraguay, Qatar, Russia, Saudi-Arabia, Seychelles, St Helena, Senegal, Surinam, Syria, Swaziland, Turks & Caicos Islands, French Southern Areas, Thailand, Tajikistan, Tokelau Islands, Turkmenistan, Tunisia, Tonga, Trinidad and Tobago, Ukraine, Uruguay, Uzbekistan, St Vincent (VC), British Virgin Islands, Virgin Islands (USA), Vietnam (VN), Wallis and Futuna Islands, Republic of South Africa, Zimbabwe

APPENDIX 11 BROKERS AND TRADERS IN EU COUNTRIES

THE NETHERLANDS

W. Adams Vegetable Oils B.V.
Address: Karel Doormanstraat 22, 3012 GJ Rotterdam
Telephone: + 31 (0)10 4149200
Fax: + 31 (0)10 4138960
E-mail: adamsveg@euronet.nl

A.D.M. Europoort B.V.
Address: P.O Box 1105, 3180 AC Rozenburg
Telephone: + 31 (0)181 257200
Fax: + 31 (0)181 257307

Agrioil BV
Address: Ungerplein 2, 3033 BR Rotterdam
Telephone: + 31 (0)10 46 75 566
Fax: + 31 (0)10 46 52 515
E-mail: info@agrioil.nl

Algemene Oliehandel B.V.
Address: P.O. Box 13072, 3507 LB Utrecht
Telephone: + 31 (0)30 2334514
Fax: + 31 (0)30 2342102
E-mail: webmaster@aoh.nl
Internet: http://www.aoh.nl

Balfour, Maclaine International Nederland B.V.
Address: P.O. Box 1466, 3000 BL Rotterdam
Telephone: + 31 (0)10 4662355
Fax: + 31 (0)10 4677550
E-mail: mail@balfourmaclaine.nl

Bunge Trade Services B.V.
Address: P.O. Box 1882, 3000BW Rotterdam
Telephone: + 31 (0)10 2176666
Fax: + 31 (0)10 2331299
E-mail: bgenderen@bunge.com
Internet: www.bunge.com

Cargill B.V.
Address: P.O. Box 8074, 1005 AB Amsterdam
Telephone: + 31 (0)20 5801911
Fax: + 31 (0)20 6842209
E-mail: oilseedslogistics@cargill.com
Internet: www.cargill.com

Cereol Benelux B.V.
Adress: P.O. Box 8048, 3503 RA Utrecht
Telephone: + 31 (0)30 2921611
Fax: + 31 (0)30 2936328

City Oils Rotterdam BV
Address: Jan Tomstraat 2B, 2941 CD Lekkerkerk
Telephone: + 31 (0)180 669112
Fax: + 31 (0)180 664233

Contined BV
Address: P.O. Box 37, 6720 AA Bennekom
Telephone: + 31 (0)318 413041
Fax: + 31 (0)318 414533
E-mail: foodproducts@contined.nl
Internet: www.contined.nl

Demeter B.V.
Address: P.O. Box 139, 2950 AC Alblasserdam
Telephone: + 31 (0)78 6920692
Fax: + 31 (0)78 6920695
E-mail: info@demeter.nl

D0-IT BV (organic)
Address: Prins Hendrikweg 19, 3771 AK Barneveld
Telephone: + 31 (0)342 423119
Fax: + 31 (0)342 423571
E-mail: info@organic.nl
Internet: www.organic.nl

Loders Croklaan BV (organic)
Address: P.O.Box 4, 1520 AA Wormerveer
Telephone: + 31 (0)75 6292911
Fax: + 31 (0)75 6289455
E-mail: fats.lc@croklaan.com

Louis Dreyfus & Cie. Rotterdam B.V.
Address: P.O.Box 270, 3000 AG Rotterdam
Telephone: + 31 (0)10 4110480
Fax: + 31 (0)10 4130432
E-mail: ldrotterdam@louisdreyfus.fr
Internet: www.ldcorp.com

L. Hendrix BV
Address: P.O. Box 123, 2950 AC Alblasserdam
Telephone: + 31 (0)78 6916111
Fax: + 31 (0)78 6917638
E-mail: info@l-hendrix.nl
Internet: www.l-hendrix.nl

Lotze & Co BV
Address: Kipstraat 3c-5c, 3011 RR Rotterdam
Telephone: + 31 (0)10 4331144
Fax: + 31 (0)10 4112641
E-mail: lotzeco@wxs.nl

Marine Olie Handelmij. B.V.
Address: Blokweg 5B, 4761 RA Zevenbergen
Telephone: + 31 (0)168 372150
Fax: + 31 (0)168 335766
E-mail: info@marine-olie.nl
Internet: www.marine-olie.nl

Matthes & Porton BV
Address: P.O. Box 30179, 3001 DD Rotterdam
Telephone: + 31 (0)10 4056633
Fax: + 31 (0)10 4066037

F.N. & W.H. Montauban van Swyndregt BV
Address: PO Box 30028, 3001 DA Rotterdam
Telephone: + 31 (0)10 4124893
Fax: + 31 (0)10 4144781
E-mail: commerce@rutteman.com

Nidera Handelscompagnie B.V.
Address: P.O. Box 676, 3000 AR Rotterdam
Telephone: + 31 (0)10 4301911
Fax: + 31 (0)10 4130338
E-mail: info@nidera.nl
Internet: www.nidera.nl

B.V. Olie- en Vetbedrijf "OLIVET" v/h H.J. Otten
Address: P.O. box 853, 3000 AW Rotterdam
Telephone: + 31 (0)10 5017111
Fax: + 31 (0)10 5015525
E-mail: olivet@wxs.nl

Otterboer BV
Address: P.O.Box 751, 2900 AT Capelle a/d IJssel
Telephone: + 31 (0)10 4272599
Fax: + 31 (0)10 4272598

Makelaardij Gebr. H. en P. Pigmans B.V.
Address: Rodezand 34, 3011 AN Rotterdam
Telephone: + 31 (0)10 4111570
Fax: + 31 (0)10 4127793
E-mail: h-p-pigmans@hetnet.nl

Roskamp, Van der Ven & Both Shipbrokers B.V.
Address: Maasboulevard 88P, 3207 RC Spijkenisse
Telephone: + 31 (0)181 621499
Fax: + 31 (0)181 623817

C. van de Sandt B.V.
Address: P.O. Box 35030, 3005 DA Rotterdam
Telephone: + 31 (0)10 4221177
Fax: + 31 (0)10 4610665
E-mail: info@cvandesandt.com

M. Themans & Co. BV
Address: P.O. Box 320, 3130 AH Zwijdrecht
Telephone: + 31 (0)78 6183111
Fax: + 31 (0)78 6184383
E-mail: themans@indi.nl

Tradin Organic Agriculture B.V. (organic)
Address: Latexweg 12, 1047 BJ Amsterdam
Telephone: + 31 (0)20 4074499
Fax: + 31 (0)20 4972100
E-mail: tradin@wxs.nl

BV Verenigde Oliefabrieken v/h H. Spits & Zoon en H. de Haan & Zoon
Address: P.O. Box 1140, 3000 BC Rotterdam
Telephone: + 31 (0)10 2868080
Fax: + 31 (0)10 4362586
E-mail: info@vo.nl
Internet: www.vo.nl

Albrecht H. Zetsche (Rotterdam) BV
Address: P.O. Box 339,2990 AH Barendrecht
Telephone: + 31 (0)180 618555
Fax: + 31 (0)180 618558
Internet: www.rs.com

GERMANY

Alberdingk Boley GmbH
Address: P.O. Box 446/448, D-47829 Krefeld Uerdingen
Telephone: + 49 (0)2151 575280
Fax: + 49 (0)2151 575775
Internet: www.cerestar.com

Brökelmann & Co. Oelmühle und Raffinerie K.G.
Address: P.O. Box 1291, D-59002 Hamm
Telephone: + 49 (0)2381 949128
Fax: + 49 (0)2381 949114
E-mail: broklemann@t-online.de
Internet: www.broelio.de

Walter Rau AG
Address: P.O. Box 101248, D-41460 Neuss
Telephone: + 49 (0)2131 2080
Fax: + 49 (0)2131 208261
E-mail: norberthorn@walterrauag.de
Internet: www.walterrauag.de

C. Thywissen GmbH
Address: Industriestrasse 34, D-41460 Neuss
Telephone: + 49 (0)2131 26041
Fax: + 49 (0)2131 2604220
E-mail: info@cthywissenoel.de

Alfred C. Toepfer International GmbH
Address: P.O. Box 106120, D-20042 Hamburg
Telephone: + 49 (0)40 30130
Fax: + 49 (0)40 3013634
E-mail: mail@acti.de
Internet: www.acti.de

BELGIUM

Atofina, Oleochemical Department
Address: Rue de l' Industrie 52, 1040 Brussels
Telephone: + 32 (0)2 2889668
Fax: + 32 (0)2 3411749
E-mail: jo.deroover@oleon.com

N.V. Cargill
Address: Prins Albertlaan 12, B-8870, Izegem
Telephone: + 32 (0)51 332211
Fax: + 32 (0)51 311965
E-mail: infobelg@mailhub1.cargill.com
Internet: www.cargill.com

Vamo-Fuji Specialities N.V.
Address: Kuhlmannlaan 36, B-9042 Gent
Telephone: + 32 (0)9 3417744
Fax: + 32 (0)9 3442610
E-mail: info@fujioileurope.com
Internet: www.fujioil.com.jp/english

UNITED KINGDOM

M.W. Beer & Co. Ltd.
Address: Station Court Station approach, Wickford, Essex SS11 7AT
Telephone: + 44 (0)1268 560260
Fax: + 44 (0)1268 560261
E-mail: trading@mwbeer.co.uk

Central Edible Oils Ltd.
Address: Dunnings Bridge Road, Bootle Merseyside L30 6TJ
Telephone: + 44 (0)51 5255151
Fax: + 44 (0)51 5255899

F. Fontannaz (Holdings) Ltd.
Address: 112 Middlesex Street, London E1 7HY
Telephone: + 44 (0)20 7171 3778877
Fax: + 44 (0)20 7171 3771309

FRANCE

Cereol France
Address: 14 Bd. Du Général Leclerc, F-92572 Neuilly-sur-Seine
Telephone: + 33 (0)1 41431550
Fax: + 33 (0)1 41431779
E-mail: info@cereol.fr
Internet: www.cereolworld.com

GMS Alimentaire
Address: 1 Place Henry Levy, 67016 Strasbourg Cedex
Telephone: + 33 (0)88 608400
Fax: + 33 (0)88 608410

Sercom S.A.
Address: 6 Avenue Charles de Gaulle, 78150 Le Chesnay
Telephone: + 33 (0)1 39546100
Fax: + 33 (0)1 39633478

ITALY

Fratelli Bongioanni S.r.L
Address: Via E. Pagliano 19, 20149 Milan
Telephone: + 39 02 4982851
Fax: + 39 02 4814465

S.I.R.C.E.N. snc
Address: C. so Milano 26, 20052 Monza
Telephone: + 39 039 2301285
Fax: + 39 039 369543

APPENDIX 12 USEFUL INTERNET SITES

www.fao.org
On-line FAO databases (statistical, textual and graphical).

www. europa.eu.int
This site provides information about the European Union and gives links to many organisations working within the EU

www.ifoma.com
Website of the International Fishmeal & Oil Manufacturers.

www.oilseeds.org
Website of the National Institute of Oilseeds Products (NIOP)

www.agr-net.com
Leading information service reporting on European and international agricultural policy, agribusiness and food industry.

www.tscentral.com
Overview of international trade fairs worldwide

www.expobase.com
Website of international trade fairs

http://europa.eu.int.
EU and links to Eurostat. Macro data on the EU

http://mkaccdb.eu.int
Database of European Commission on import regulations, duties and trade barriers.

CBI puts you in touch with the markets of Europe

CBI, the Centre for the Promotion of Imports from developing countries, is an agency of the Netherlands Ministry of Foreign Affairs. Since its establishment in 1971, CBI operates within the policy framework set by the Minister for Development Co-operation. Its mission is to contribute to the economic independence of developing countries. To fulfil this mission, CBI aims at strengthening the competitiveness of companies in those countries on international markets, primarily the West-European market, by improving conditions in enterprises and business support organisations. CBI considers social values and compliance with the most relevant environmental requirements to be an integral part of its policy and activities

CBI offers various programmes and services to its target groups:

Market information

- CBI News Bulletin (6 times annually);
- CBI guide “Exporting to the European Union”;
- Market surveys and strategic marketing guides covering the EU including The Netherlands;
- Quick scans on environmental, social and health issues;
- Manuals on subjects such as technical and environmental regulations, trade fair participation, Fashion Forecast etc.;
- CBI’s extensive Web site at www.cbi.nl providing general information about CBI, details about CBI programmes, CBI publications (downloadable free-of-charge) and the GreenBuss database on European trade-related environmental policy and technology;
- CBI’ s Trade Documentation Centre offering supply-related information to importers, such as exporters’ directories, country and sector information, periodicals from developing countries, and - to visiting exporters - demand-related information such as market information, trade magazines, address books of European companies etc.

Matching services

CBI’s computerized exporters’ and importers’ databases, containing around 3,500 regularly updated company profiles, are instrumental in providing buyers and suppliers with relevant company data on potential trade partners.

Export promotion programmes (EPP)

Step-by-step approach providing intensive assistance to selected exporters in developing countries in order to obtain a firm and lasting position on the EU market. Made to measure, demand- driven and flexibility are combined with fixed elements such as:

- pre-selection of candidates based on written documentation;
- technical assistance during company visits and distance guidance by CBI branch experts;
- export marketing training (for instance through the EXPRO seminars);
- market entry (for instance via participation in European trade fairs);
- market consolidation by way of follow-up support, further technical assistance and/or repeat market entry activities.

Human resources development

- BSO MARKET INTEL: five-day seminar in Rotterdam for relevant middle management staff of BSO’s, aiming at supporting BSO’s in establishing or improving a Market Information Service (MIS);
- CAPITA: two-week seminar in Rotterdam for specific industry & trade associations. Aims to provide –through their associations- specific industries or sectors in developing countries with tools to engage in business relations with importers and/or manufacturers in the EU;
- BSO-FAME: two-week seminar in Rotterdam for project managers of BSOs focusing on practical knowledge and applicable tools in export promotion to international markets in general and the European market in particular;
- IntFair: two-week seminar in Rotterdam for BSO staff members on the organization of collective participation in European trade fairs;
- Expro: seven-day seminar in Rotterdam on export marketing and management for selected exporters participating in a CBI export promotion programme;
- Workshops in developing countries: 2-4 days for BSOs and/or exporters, focussing on general export marketing and management, a specific product sector or on specific subjects.

Multilateral co-operation

CBI co-operates with the International Trade Centre (ITC/WTO) to globalize trade promotion and with other European import promotion organizations to increase efficiency and effectiveness by combining efforts.

Please write to us in English, the working language of the CBI.

Centre for the Promotion of Imports from developing countries
Centrum tot Bevordering van de Import uit de ontwikkelingslanden

Mailing address:
CBI
P.O. Box 30009
3001 DA Rotterdam
Phone +31 (0) 10 201 34 34
Fax +31 (0) 10 411 40 81
E-mail cbi@cbi.nl
Internet www.cbi.nl

Office and showroom:
WTC-Beursbuilding, 5th Floor
37 Beursplein, Rotterdam,
The Netherlands.

Mailing address: P.O. Box 30009, 3001 DA Rotterdam, The Netherlands
Phone: +31 10 201 34 34 Fax: +31 10 411 40 81
E-mail: cbi@cbi.nl Internet: http://www.cbi.nl
Office and showroom: WTC-Beursbuilding, 5th floor
37 Beursplein, Rotterdam, The Netherlands