



TOEPFER
INTERNATIONAL



Export Markets for Sustainable Crops

Bastian Supper

Alfred C. Toepfer International GmbH



**TOEPFER
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ACTI Ukraine

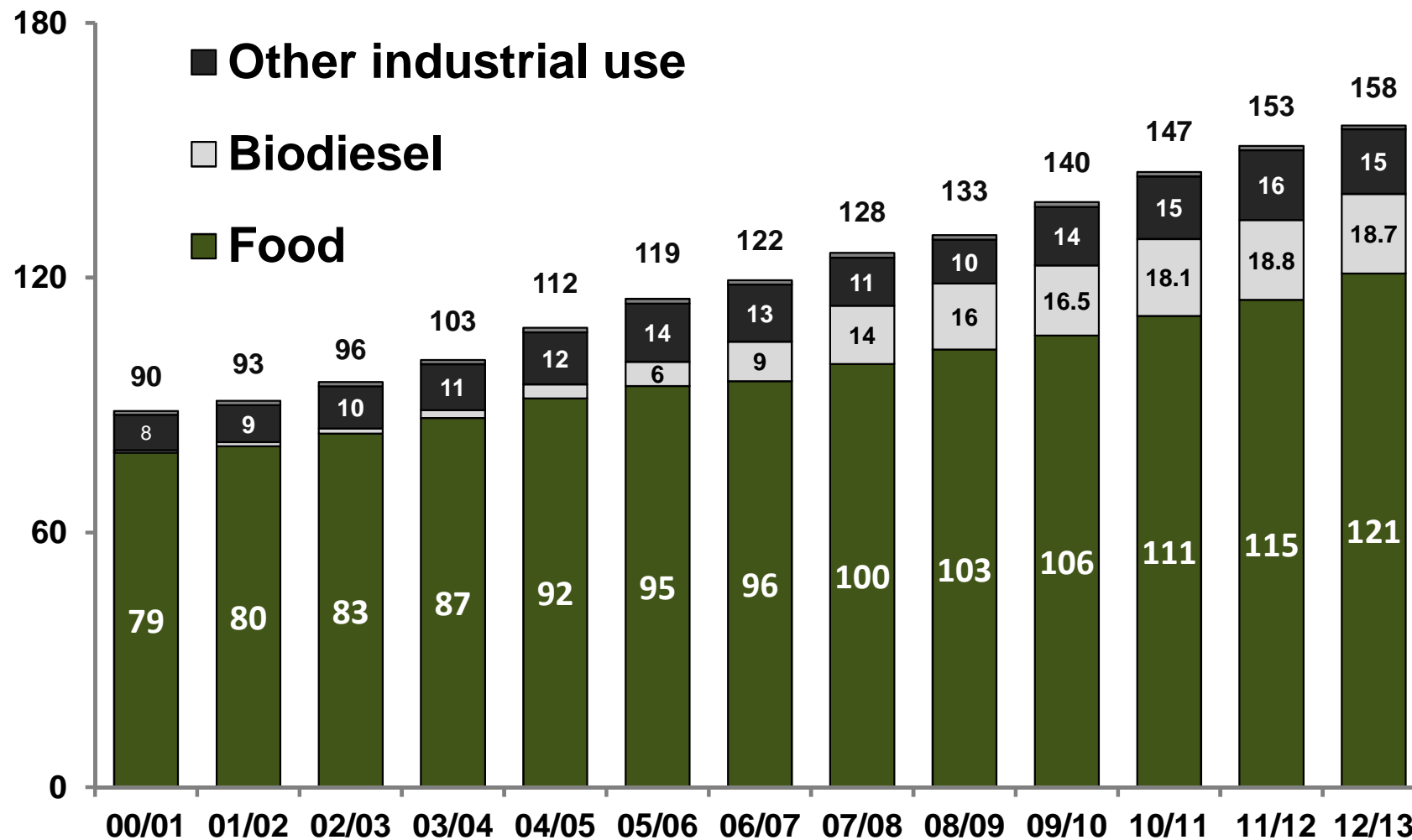


Toepfer Ukraine at a Glance

- Started in 1993
- Today 946 employees
- 7 inland elevators, 1 river terminal, 1 export terminal
- 670K mt storage / transshipment capacity
- Leading positions in grain / seeds export

World Vegetable Oil Demand (mln t)

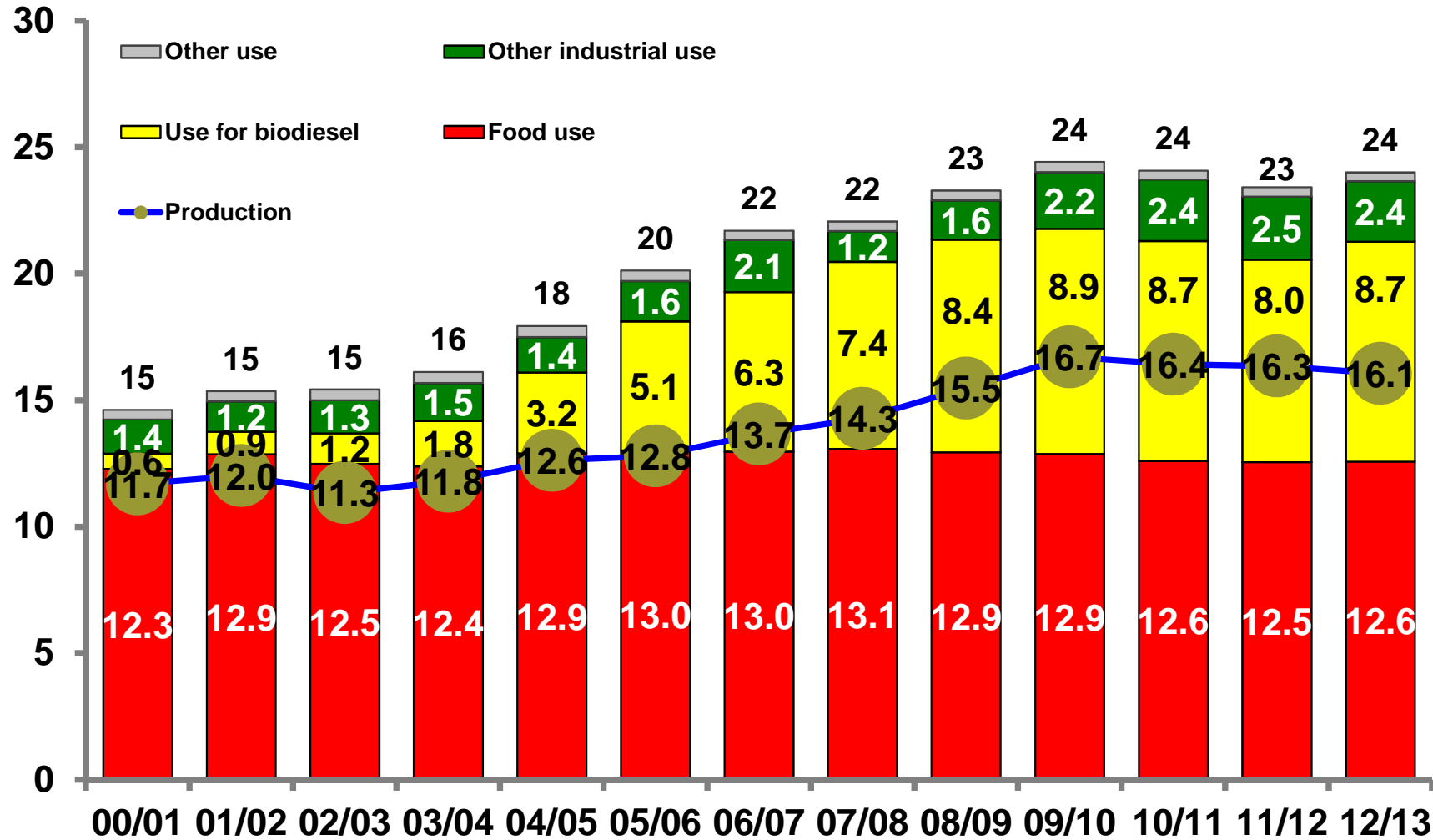
Driven by Food and Energy Use





EU Vegetable Oil Demand (mln t)

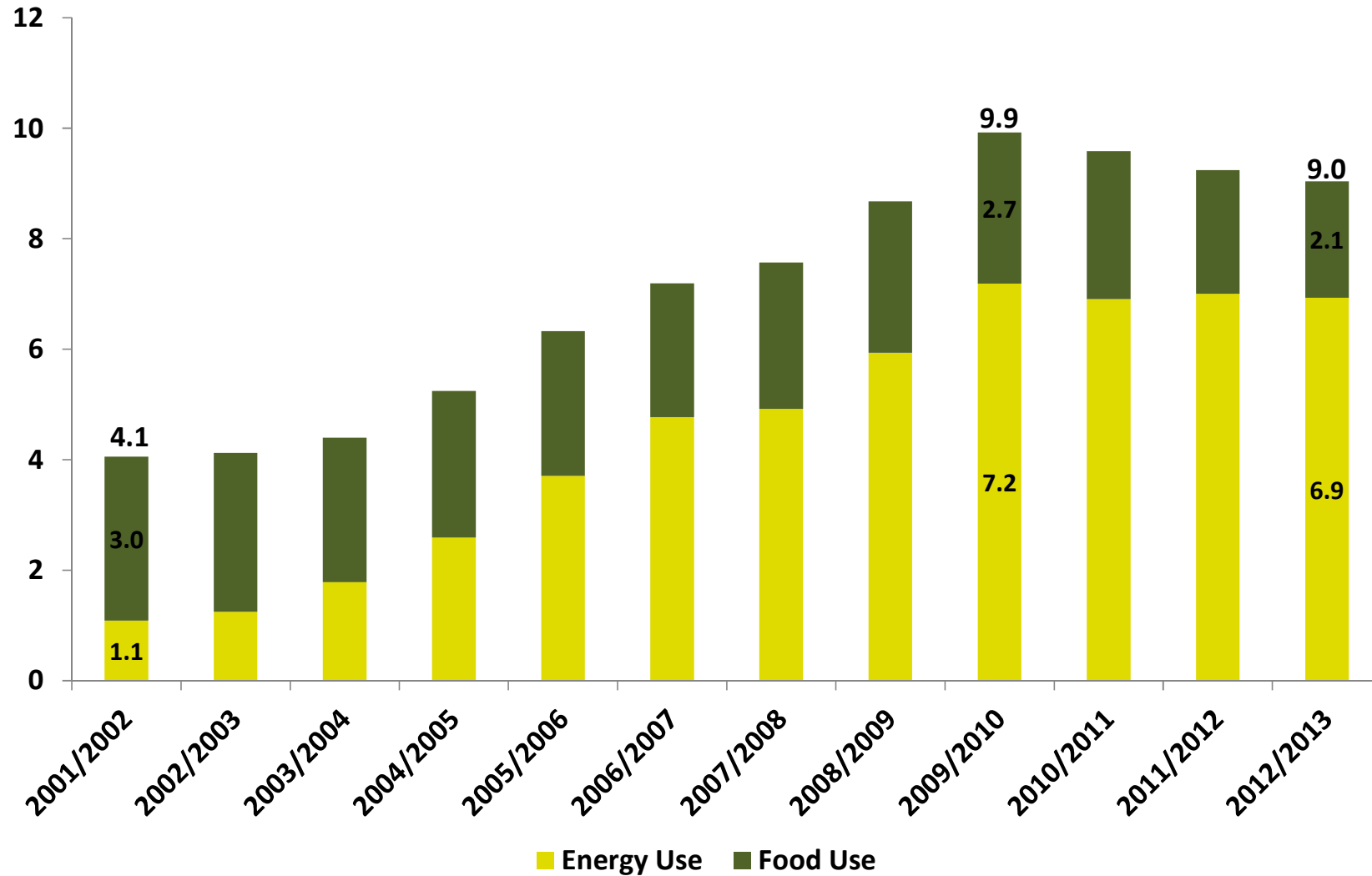
Driven by Food and Energy Use





EU Rapeseed Oil Use (mln t)

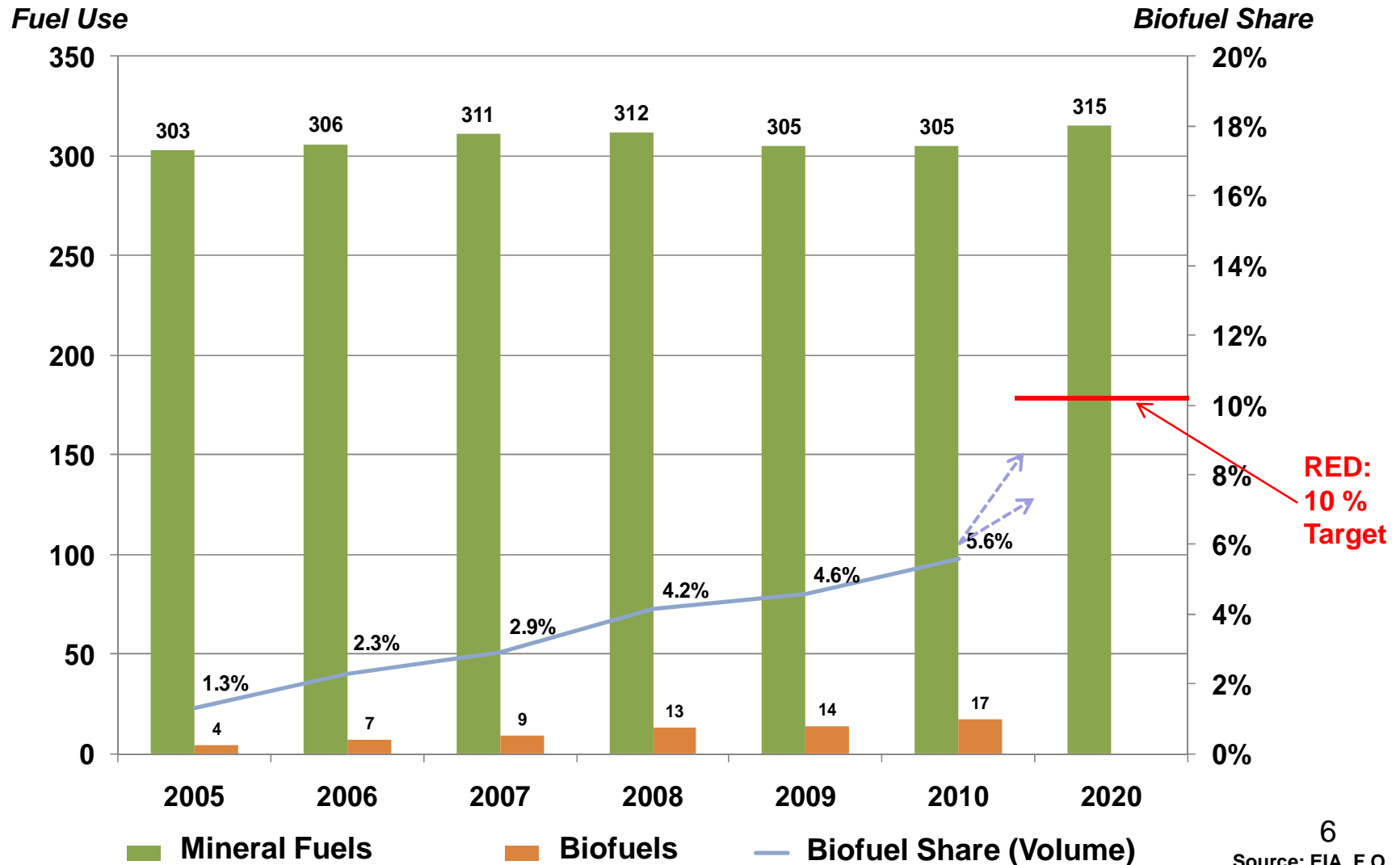
Biofuels the major driver





EU: Biofuel and Mineral Fuel Use (mln t)

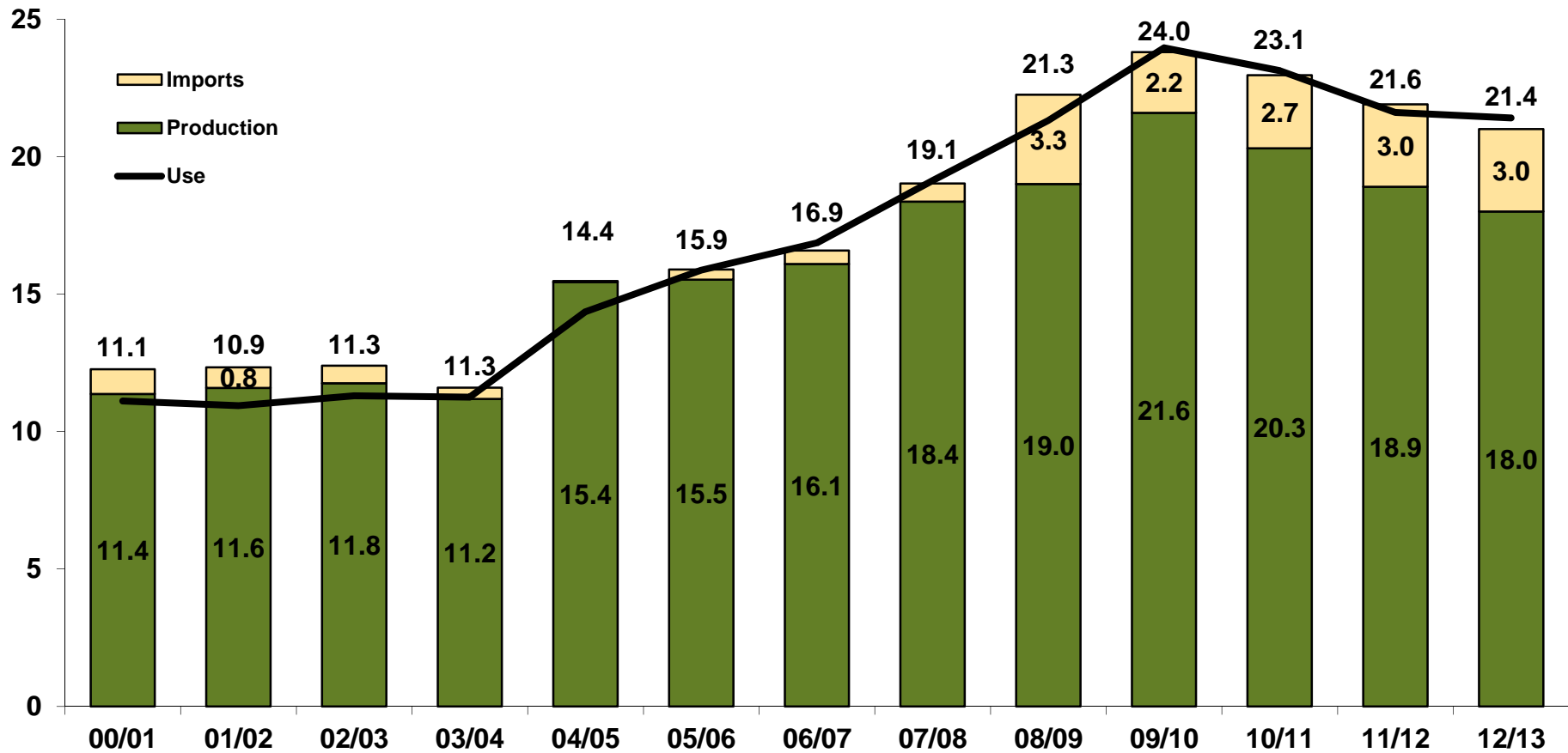
Share of Biofuels still small





EU Rapeseed Supply & Demand (mln t)

The Need for Imports



EU Rapeseed Supply & Demand (mln t)

The Need for Imports

	2008/09	2009/10	2010/11	2011/12	2012/13
Production	19.1	21.5	20.3	19.0	18.1
Imports	3.3	2.2	2.7	3.0	3.2
<i>thereof</i>					
Ukraine	2.3	1.4	1.2	1.2	0.9
Australia	0.8	0.4	1.1	1.5	1.9
Canada	0.0	0.1	0.3	0.3	0.2
Total Use	21.3	24.0	23.1	21.7	21.4

Ukraine Rapeseed S&D (mln t)

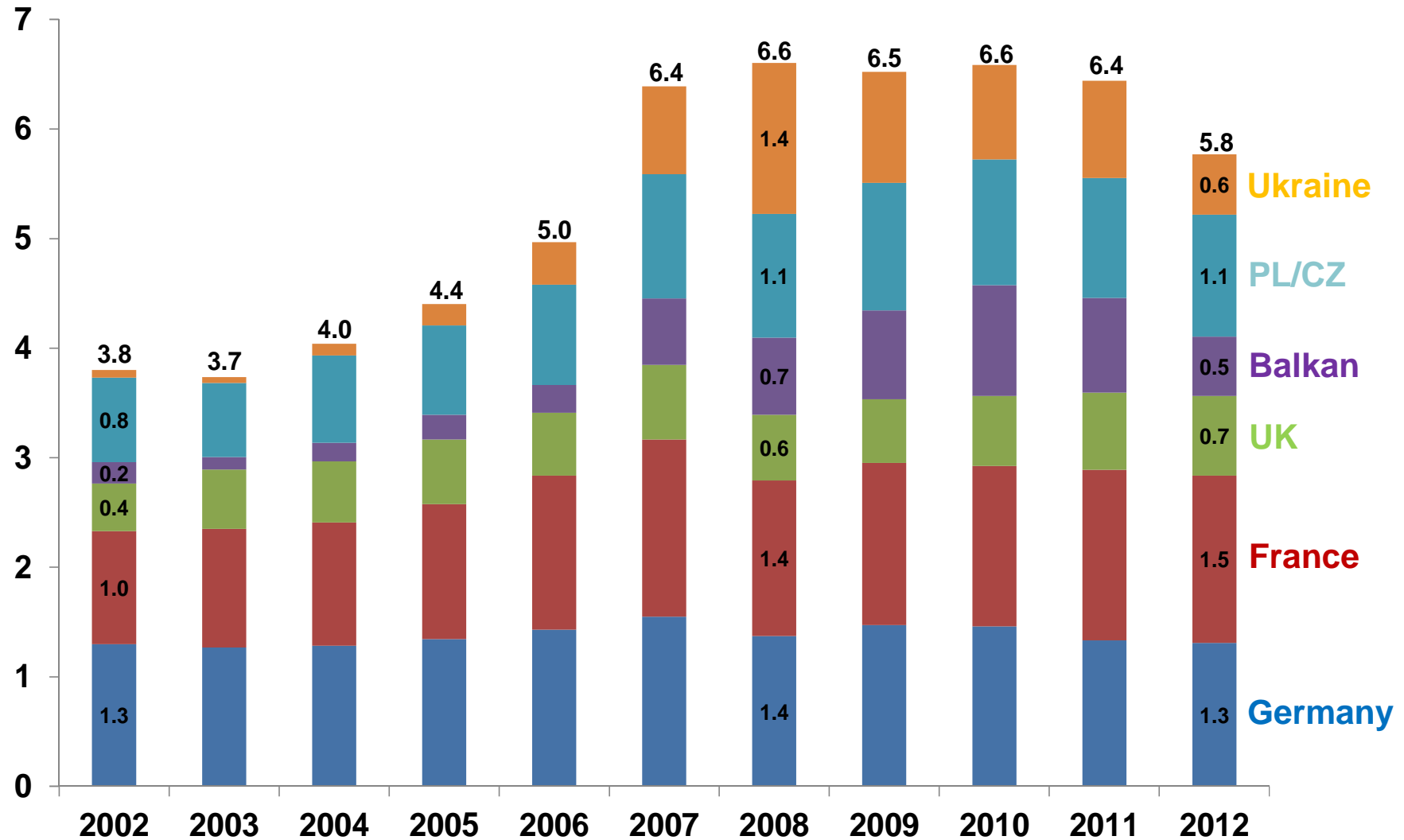
EU-27 the most important market

	2008/09	2009/10	2010/11	2011/12	2012/13
Production	2.9	1.9	1.5	1.4	1.2
Exports	2.6	1.8	1.4	1.3	1.0
<i>thereof</i>					
<i>EU</i>	2.3	1.4	1.2	1.2	0.9
<i>UAE</i>	-	0.1	-	-	-
<i>Pakistan</i>	0.1	-	-	-	-
<i>Turkey</i>	0.1	0.1	0.1	0.1	0.1
Total Use	0.2	0.1	0.1	0.2	0.1



Rapeseed area in EU/Ukraine (mln ha)

Stagnation

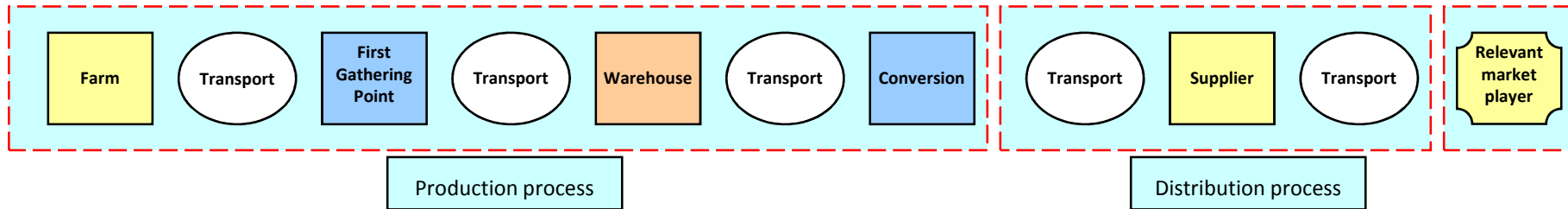




- **Only sustainable biomass is permitted to be used**
 - for biomass fuel (raps, soy, palm, corn, wheat, barley)
 - for power generation (palm- and other vegetable oils)
- **Certification from farm to processing and blending (mineral oil industry)**
- **Certified and non-certified products do not need to be separated – principle is mass balance**
- **Certification will be done in accordance with the standards, such as ISCC**
- **ISCC = International Sustainability & Carbon Certification**

www.iscc-system.org

Relevant items for certification



Source: ISCC 2010, www.iscc-system.org

Farming

- no direct certification necessary, but optional possible
- Sustainability indicated by „Self-declaration“ to the [First-Gathering-Point](#)
- 5% of all farming enterprises will be visited
- Expensis for the audits included in the certification and auditing process of the First-Gathering-Point

First-Gathering-Point

- must be certified
- The First-Gathering-Point is the first company buying and taking the cargo into their accounting after the farmer
- 5% of all warehouses will be audited

Warehouses

- no direct certification necessary, but optional possible
- Groupcertification possible, in case several First-Gathering-Points are using the same warehouse

Processsing plants

- Processors like oilmills and biomass fuel plants, including their suppliers must be certified

- 1. Toepfer Ukraine is certified as a first gathering point, three major areas:**
 - a. Toepfer Ukraine & Toepfer Hamburg have established Mass Balance System electronically**
 - b. Management system established with risk analysis, with clear responsibilities and procedures defined**
 - c. Self declaration of farmers: Toepfer needs to gather and store and to make available for later checks. Basis for the whole value chain**

- 2. Toepfer Ukraine will be a partner for farmers**
 - a. Providing information on requirements of ISCC**
 - b. Self declaration**
 - c. Assisting in fulfilling all requirements of ISCC**
 - d. Toepfer bears all costs for certification, audits and farm visits**

Contacts

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