



COMPETERE
Policies for Sustainable Development

REPORT

PALM OIL IMPORTS TO THE EU-27

An overview of trends between 2015 and 2021

Focus on edible palm oil



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INTRODUCTION

We present an overview of the trends in palm oil imports in the EU-27 between 2015 and 2021. The scope of the analysis includes the EU's top nine supplier countries (Indonesia, Malaysia, Guatemala, Papua New Guinea, Colombia, Honduras, Ecuador, Thailand, and Nigeria) selected based on trade volume and/or outlook for future development. As some of the world's main producers and Europe's key trading partners, the countries of Indonesia, Malaysia, Guatemala, Papua New Guinea, and Colombia are analyzed in greater depth.

The objective is to provide a snapshot of the trade dynamics and trends, with particular attention paid to the anti-palm oil campaign of the mid-2010s, COVID-19 pandemic years (2020-2021), and the imports of edible oil through time.

Future reports will build on the current paper to analyze the month-by-month variation in imports to the EU in the spring of 2022 compared to the spring of 2021, with the aim of investigating the impact of the Russian-Ukrainian war, and the relative shortage of sunflower oil, on the trade of total and edible palm oil.

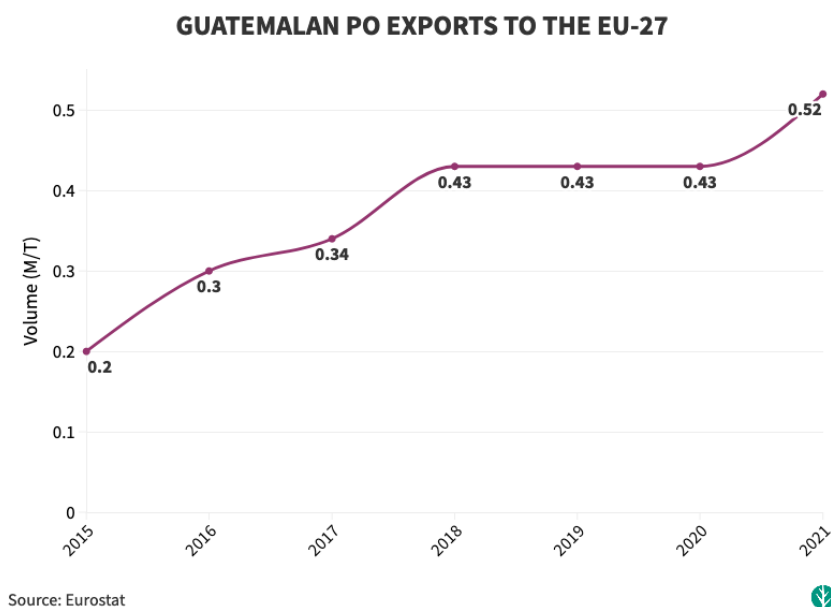
KEY FINDINGS

- Indonesia, Malaysia, Guatemala, and Papua New Guinea were the top four exporters to the EU in 2021.
- Imports from Thailand, Nigeria, Honduras, Papua New Guinea, and Ecuador have been less steady across time than those from Indonesia, Malaysia, Colombia, and Guatemala.
- Guatemala, Nigeria, and Ecuador are the only countries to have seen their exports to the EU increase from 2020 to 2021, despite the crisis brought on by the COVID-19 pandemic.
- In 2021, Guatemala and Papua New Guinea overtook Indonesia as the second and third largest supplier of edible palm oil after Malaysia.



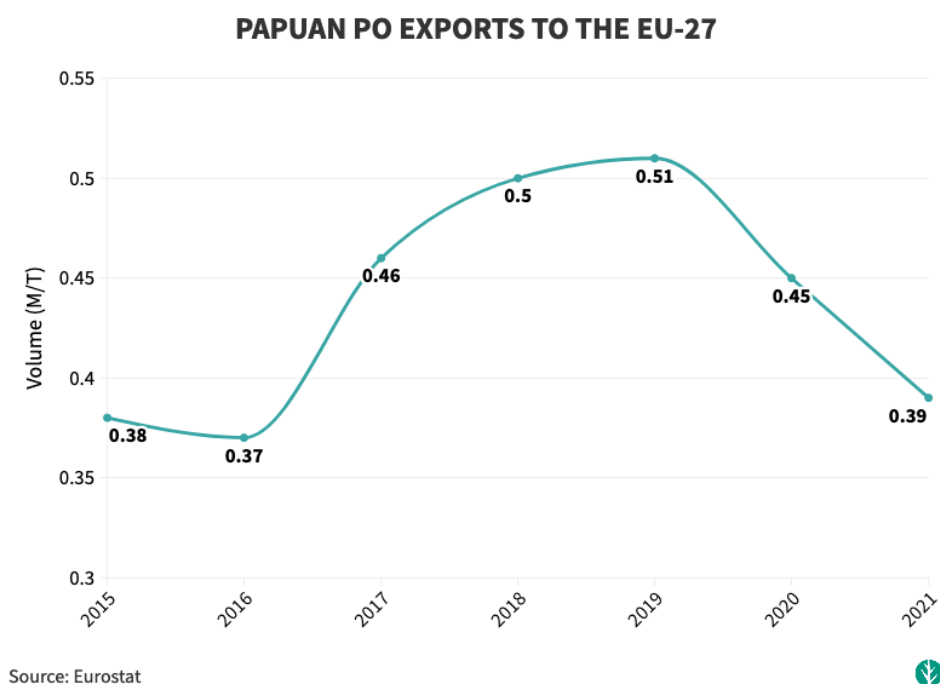
Guatemalan exports to the EU increased from 2020 to 2021, reaching a record-high of 0.52M/T (Figure 3). This confirms a steady growth of exports, with a total change +260% since 2015, allowing the country to take over Papua New Guinea as the EU's third largest partner.

Figure 3



Imports from **Papua** decreased from 0.45M/T in 2020 to 0.39M/T in 2021 (Figure 4). As such, it lost its position as the EU's third largest palm oil exporter for the first time since 2015, replaced by Guatemala.

Figure 4





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