



Food and Agriculture Organization
of the United Nations

2017

OILCROPS COMPLEX

POLICY CHANGES AND INDUSTRY MEASURES

Annual compendium

FILIÈRE OLÉAGINEUSES

ÉVOLUTION DES POLITIQUES ET DES MESURES SECTORIELLES

Recueil annuel

SECTOR OLEAGINOSAS

CAMBIOS DE POLÍTICAS Y DE MEDIDAS DEL SECTOR INDUSTRIAL

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Trade and Markets Division (EST)
Division des produits et échanges (EST)
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ISBN: 978-92-5-130606-2
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Introduction

The purpose of this compendium is to offer, in a single document, an overview of salient policy changes and related private sector measures concerning global and national markets for oilseed, oils/fats and meals in a particular year – in this case 2017.

The compendium reproduces, in tabular form, all the policy and industry news items published throughout 2017 in the *FAO Oilcrops Monthly Price and Policy Update (MPPU)*. The main purpose is to facilitate the work of policy makers, market experts, analysts and other stakeholders by providing a short, concise overview of policy developments relevant to the oilcrops industry at the global, regional and national level.

Although every care has been taken to cover the most salient and relevant developments, the list of items presented is not exhaustive. Drawing on a variety of sources, the accounts provided concentrate on key facts, refraining from in-depth analytical impact assessments.

The news items are presented in two major groups: 1) policy changes implemented (or under consideration) by national governments; and 2) voluntary industry initiatives, which include measures taken by private companies, sector associations, civil society groups and research and financial institutions.

In the tables, national policy changes are grouped by policy domains and, thereunder, by country (in alphabetical order), including reference to the month of implementation and to the product concerned. Industry measures, on the other hand, are presented by topic and, thereunder, in chronological order, with indication of the concerned country.

Acknowledgements: This report has been compiled by the Oilseeds Desk of the Trade and Markets Division (EST) under the lead of P. Thoenes and with the assistance of F. Greb, G. Karumathy and M. Milo. Support from E. Vecchione who formatted this report is gratefully acknowledged.

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Highlights

In what follows, the most relevant policy changes and trends observed in 2017 are summarized below in bullet form. More detailed information is available in the ensuing tables (available in English only).

NATIONAL POLICIES

Production support: *China* continued implementing production support policies aimed to trim maize production (along with reforms of the country's grain reserve system), while encouraging the cultivation of soybeans, rapeseed and other land uses, including fallow periods. To raise the efficiency of its farm support schemes, the country replaced its target price system for soybeans – in place until 2016 – by per hectare payments de-coupled from market prices. In *India*, minimum support prices for oilcrops saw the customary upward adjustments, but farmers and industry associations maintained that the increases were insufficient to offset higher production costs and stressed that public market interventions remained too small to support the government-set prices. To address situations of rural distress caused by weak commodity prices, a number of compensation schemes were launched at state level. Also other countries maintained their production support programmes, mainly relying on direct payments to farmers and subsidized loan schemes. *Brazil* also raised its outlays for crop insurance schemes (for the second year in succession), while *Indonesia* launched a public oil palm rejuvenation programme focused on small growers.

Sector development: Several countries, primarily in the Asia-Pacific region, implemented a variety of sector development measures, targeting in particular coconut and, to a lesser extent, soybean and oil palm production. Typically, these measures were aimed at: i) reducing a country's import dependence; ii) meeting growing domestic demand; iii) fostering local value addition and raising export earnings; and iv) promoting more sustainable and resilient agricultural systems or pursuing other long-term development objectives. While most initiatives focused on boosting production, strategies to achieve this differed widely and included area expansion, distribution of high-yielding seeds, plantation rejuvenation, promotion of new cultivation methods, and price guarantees.

Pest control measures: In *Canada*, the *EU* and the *United States*, Glyphosate, a widely used but “possibly carcinogenic” herbicide, came under scrutiny, but all three countries concluded that the chemical is not likely to pose health risks. The *EU*, however, renewed the product's authorization only for an abbreviated period of five (instead of the customary fifteen) years. Another herbicide, Dicamba, received particular attention from policymakers in the *United States* for its potentially negative effects on non-resistant crops, triggering state-specific restrictions as well as agreements with manufacturers on protective measures. In the *EU*, a bacterial infection affecting olive trees remained of concern, prompting renewed efforts to improve early detection, prevention and disease control measures.

Market regulation: Although featuring less prominently in 2017 than in the previous year, a number of countries adjusted price control measures aimed at supporting producers or consumers. Changes in value-added taxes also continued to be used as a policy instrument. Public procurement, stockholding and stock disposal of oilcrops remained in place in *China* (where public sales of soybeans and rapeseed oil from state reserves shrank compared to previous years, in tandem with the gradual phasing-out of government purchases) as well as in *India*, *Indonesia* and *Sri Lanka*. While *India* scaled up and streamlined its public procurement operations, overall, interventions remained localized and intermittent. *Canada* renewed provisions to protect farmers from surges in domestic shipping costs.

Food standards: Consistent with similar efforts elsewhere, *Canada* banned partially hydrogenated oils – the main source of harmful trans fats – from the country's food chain. *Thailand* considered to follow suit. In *India*, a limit on trans fat content has become effective and labelling mandatory. Thresholds for certain types of fat and explicit health claims on product labels also received attention in the *United States* and *Peru*. Furthermore, a number of countries introduced food safety measures specifically targeted at vegetable oil adulteration. At the international level, the FAO/WHO Codex Alimentarius Commission issued its first (non-binding) standard concerning fish oil, in addition to deliberating on modifications to a number of other, existing standards concerning oilcrops and derived products.

GMO policies: Under broader efforts to facilitate trade with the *United States*, *China* renewed the import approval for feed use for seven GM oilseed varieties and granted it for two new ones. The *EU* and *Turkey* also authorized the importation of new GM varieties, again exclusively for consumption purposes (i.e. not for cultivation). While *Argentina* cleared the cultivation of one new GM soybean variety, *India* further postponed the approval of a locally developed GM mustard seed representing the country's first GM food crop. On the other hand, *Mexico* revoked an earlier approval of a GM soybean after detecting unauthorized use. *Australia* considered compensation of farmers losing their GM-free or organic certification due to GM-rapeseed contamination. As for mandatory labelling of GM content in food products, *Canada's* lawmakers rejected corresponding proposals – contrary to the *United States*, where new regulations to such effect are set to come into force in 2018.

Biofuel policies: A number of countries (comprising *Argentina*, *Indonesia*, *Thailand* and the *United States*) made adjustments to their biofuel support programmes, while others (*Brazil*, *Canada*, the *EU* and the *United Kingdom*) embarked on comprehensive reviews of their existing bioenergy policies. The *EU* remained committed to its cap on crop-based biofuels (which include vegetable oil-based diesel), while progressively replacing them with “second-generation” biofuels. *Indonesia* continued subsidizing producers of palm-based diesel, but considered spreading subsidies across a larger volume with a view to further stimulate domestic production. *Thailand* continued modulating its mandatory blending rate in an attempt to stabilize the domestic palm oil price. *Argentina* suspended its export duty on biodiesel to raise the competitiveness of its exports. The *United States* considered to either freeze or lower her bioenergy consumption targets for 2018 and 2019, but eventually opted for a marginal rise in the “advanced biofuels” target, which applies to biodiesel. Meanwhile, US lawmakers did not deliberate on the proposed retroactive renewal of the country's biodiesel tax credit that expired at the end of 2016.

Trade policy measures: Aimed at protecting the interests of domestic producers and consumers, *Indonesia's* and *Malaysia's* sliding export tax regimes for palm oil remained in place. At the same time, *Argentina*, *Bolivia* and *India* implemented new, non-tariff export promotion measures, while *Ukraine's* lawmakers approved a policy change encouraging oil/meal shipments as opposed to oilseed exports.

On the import side, concern with consumer hardship and adequate domestic supplies (including raw material supplies for local processing industries) induced a number of countries to ease trade barriers. Conversely, import barriers were raised elsewhere, especially in *India*, to protect local farmers and encourage domestic production, but also in a bid to support domestic processors and refiners. Whereas *China* postponed the implementation of a general non-tariff barrier for bulk vegetable oil imports, it announced a tightening in phytosanitary requirements for soybeans imported from the *United States*. Moreover, *China* lifted a non-tariff measure on Argentine soybean oil, as part of wide-ranging talks on balancing trade between the two countries.

Several comprehensive bilateral trade agreements were under negotiation or became effective in 2017 – often involving important oilseed-exporting/importing nations, particularly concerning rapeseed. At a global level, a new international agreement on olive oil took effect. 2017 also saw numerous bilateral oilcrop-specific trade initiatives, especially with regard to palm oil, aimed at: i) export promotion (including measures targeting nascent biodiesel industries); ii) meeting import needs; iii) facilitating the transfer of technical know-how (to tap local processing capacity and stimulate local demand); or iv) addressing a variety of non-tariff barriers.

The WTO ruled on a trade dispute between the *EU* and *Indonesia* concerning palm oil fatty alcohols, finding only minor violations of WTO regulation. Separately, in response to a WTO ruling from 2016, the *EU* lifted anti-dumping duties on imports of soy oil-based biodiesel from *Argentina*, while the *United States* imposed both anti-dumping and anti-subsidy duties on biodiesel imports from *Argentina* and *Indonesia*. Meanwhile, *China* confirmed the country's anti-dumping and anti-subsidy duties on distillers dried grains (a soymeal substitute) imported from the *United States*.

Transport infrastructure: *Brazil* increased its efforts to improve the country's storage and transport logistics. Reportedly, both public and private investment helped to significantly improve Brazil's northern road, fluvial and port infrastructure – resulting in total annual shipment capacity of 40 million metric tonnes of grains and a decongestion of the traditional south-bound shipment routes. Moreover, *Brazil* and *China* set up a joint investment fund for infrastructure projects, since addressing transport bottlenecks in *Brazil* has the potential to reduce significantly shipment costs to *China*, notably for soybeans.

Production sustainability: The *EU* embarked in a controversial discussion on the possible restriction – on environmental grounds – of certain vegetable oil imports earmarked for biodiesel production. Similarly, *Norway* took steps to end procurement of purportedly unsustainably produced biodiesel. The governments of *Indonesia* and *Malaysia* challenged these initiatives; they also launched mandatory national certification schemes for palm oil (as opposed to voluntary certification through The Roundtable on Sustainable Palm Oil, RSPO – the globally recognized industry-backed standard setting body for palm oil), citing overly stringent requirements, high certification costs and neglect of smallholders' concerns. Reportedly, as of December 2017, certification rates and international acceptance levels of the two national schemes were limited. Other noteworthy regulatory measures include *Indonesia's* extension of a moratorium aimed at halting deforestation and pollution from forest fires and *Peru's* commitment to consult indigenous communities prior to approving palm oil projects that would affect them.

INDUSTRY MEASURES

Voluntary private sector standards continued playing an important role in shaping the global oilseed complex and, in particular, international trade in oilcrops, oils and meals

Sustainable production: Industry standards for sustainable palm oil production kept evolving, as evidenced by several fresh initiatives promoting responsible practices along the palm oil value chain. While a number of stakeholders engaged in programmes to train smallholders on sustainable production practices and support their inclusion in certification, several global agri-trade firms renewed their commitments towards “responsible” and traceable sourcing. In some instances, producers undertook to refrain from the development of environmentally fragile peatland or accepted to restore recently developed peat areas. Furthermore, lending institutions pledged to pay increased attention to environmental/social aspects and started screening applicants from the palm oil industry for their sustainability record. Continued pressure from consumer and other civil society groups contributed strongly to these developments.

The RSPO, the globally used and widely recognized industry-led standard-setting/certification body for palm oil, launched a review of its principles and criteria, expecting to adopt a revised, stricter set of standards in late 2018. Meanwhile, compliance issues prompted the RSPO to take action against specific members for allegedly violating the organization's codes of practice – instances that observers viewed as important test cases for the RSPO's ability to uphold its own standards and regulations. The extent to which certification actually contributed to limit deforestation remained subject to debate. As for the further diffusion of certification, industry stakeholders pointed to high audit costs – combined with the lack of consumer awareness and sluggish demand for certified oil – as major hurdles. Indeed RSPO estimates suggest that global supplies of certified palm oil continued to exceed actual sales, with roughly half of all certified produce not finding a buyer. In general, demand for certified produce remained concentrated in a relatively small number of developed countries, with only small progress reported from developing nations – notably large importers like *India*, *China* or *Pakistan*. On a positive note, more buyers moved from sourcing certified palm oil through ‘book & claim’ mechanisms to buying through physical supply chains.

Though much less pronounced, sustainability discussions also concerned other oilcrops. Industry groups in *Brazil* and the *EU* forged new alliances to develop a dedicated supply chain for “responsible soy”. Furthermore, independent evaluations of *Brazil's* soybean moratorium, which bans financing and trading of soybeans grown on illegally cleared land in the Amazon region, suggested that the ban has contributed to more responsible forms of production expansion. Meanwhile, in Asia, a new public-private initiative aimed at establishing a certified sustainable coconut supply chain. Moreover, the Marine Ingredients Organisation, the body representing the global fishmeal/oil and marine ingredients industry, upgraded its global standard for responsible supply of marine raw materials.

Edible oil standards: Several countries reported efforts to improve authentication and origin identification with a view to prevent fraudulent practices and/or enhance export performance.

GMO issues: Demand for non-GM soy products has grown further in emerging niche markets in Europe and Asia. Apparently, although non-GM production increased following private investments in dedicated handling and transport facilities, total demand continued to exceed available supplies.

Biofuel measures: As in 2016, various industry initiatives related to biofuels focused on the use of non-edible biodiesel feedstock. These expanded beyond Europe, involving countries in the Americas and Asia-Pacific, often exploring biodiesel production from used cooking oil. In view of global airline CO₂ reduction commitments, also aviation-grade vegetable oil-based fuels received increased attention.

International trade: Companies in *China* announced plans to continue expanding their presence in *Brazil*, with a view to expanding direct soybean sourcing – a policy complemented by investments in *Brazil*'s storage and transport infrastructure. Furthermore, *Tunisia*'s olive oil industry launched a trade promotion programme aiming at the Japanese market.

Markets & finance: To improve price discovery and enhance risk management practices, agricultural commodity exchanges in Asia saw the launch of a soymeal options contract in *China* as well as castorseed and mustard cake contracts in *India*. In the *United States*, the Chicago Board of Trade revised the daily price change limits for soybean/meal contracts, while the *EU*'s *Euronext* exchange launched new rapeseed contracts.

Research & Development: Instances of R&D measures concerning oilcrops and derived products appear to have increased considerably in 2017 compared with the previous year. Apart from new oilseed varieties, research focused mainly on product development, covering both food and non-food industrial applications (primarily for soybeans) as well as new feed uses. Developments relevant to disease control included: rapeseed genes resistant to blackleg, a major pest; and soybean rust control strategies in Latin America. Overall, rapeseed featured prominently, accounting for more than a third of all R&D initiatives. High-oleic oilcrop varieties also received a fair amount of attention, given the respective oils' wholesome health profile, increased shelf-life and high frying capability. Research efforts to improve the yield-potential of the oil palm and coconut palm also continued.

Introduction

L'objectif de ce recueil est de proposer, dans un document unique, une vue d'ensemble des principales évolutions en matière de politiques et des mesures connexes prises par le secteur privé, pertinentes pour les marchés mondiaux et nationaux des graines, des huiles et des farines d'oléagineux au cours d'une année donnée – dans ce cas en 2017.

Le recueil reproduit, sous forme de tableau, tous les articles concernant les politiques et les mesures sectorielles publiés par la FAO tout au long de 2017 dans son Bulletin mensuel *Oilcrops Monthly Price and Policy Update (MPPU)*. Son but principal est de faciliter le travail des décideurs, des experts du marché, des analystes et autres parties intéressées en leur fournissant un aperçu, bref et concis, de l'évolution des politiques pertinentes pour le secteur des cultures oléagineuses à l'échelle nationale, régionale et mondiale.

Même si toutes les précautions ont été prises pour couvrir les évolutions les plus saillantes et les plus pertinentes, la liste des éléments présentés n'est pas exhaustive. En s'appuyant sur diverses sources, le recueil se concentre sur les principaux faits et s'abstient d'évaluer en détail leur impact.

Les informations sont scindées en deux grands groupes: 1) évolutions des politiques mises en œuvre (ou à l'étude) par des gouvernements nationaux et 2) initiatives volontaires du secteur, y compris les mesures prises par des entreprises privées, des associations sectorielles, des groupes de la société civile et des institutions financières et de recherche.

Dans les tableaux, les évolutions des politiques nationales sont regroupées par domaine politique, puis par pays (par ordre alphabétique) et sont accompagnées d'une référence à leur mois de mise en œuvre et aux produits concernés. Les mesures sectorielles sont quant à elles présentées par thème, puis par ordre chronologique, et sont accompagnées d'une indication du pays concerné.

Remerciements: Ce rapport a été préparé par l'équipe oléagineux de la Division des produits et échanges (EST) sous la direction de P. Thoenes et avec l'aide de F. Greb, G. Karumathy et M. Milo. Le soutien de E. Vecchione, qui a formaté ce rapport, est apprécié.

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Faits saillants

Les paragraphes ci-après résument les évolutions des politiques et les tendances les plus pertinentes observées en 2017 sous forme de liste à puces. Des informations plus détaillées sont fournies dans les tableaux qui suivent (disponibles en anglais seulement).

POLITIQUES PUBLIQUES

Soutien à la production: La *Chine* a continué de mettre en œuvre des politiques de soutien à la production en vue de limiter la production de maïs (en parallèle à la réforme du système de réserves céréalières du pays), et d'encourager la culture de soja, de colza et d'autres utilisations des terres, y compris des périodes de jachère. Pour augmenter l'efficacité de ses programmes de soutien agricole, le pays a remplacé son système de prix cible pour le soja – en vigueur jusqu'en 2016 – par des paiements par hectare dissociés des prix du marché. En *Inde*, les prix minimum de soutien pour les cultures oléagineuses ont été revus à la hausse comme à l'accoutumée, mais selon les agriculteurs et les associations sectorielles, les augmentations ont été insuffisantes pour compenser la hausse des coûts de production et les interventions du secteur public sur les marchés sont restées trop faibles pour soutenir les prix fixés par les pouvoirs publics. Pour faire face aux situations de détresse rurale causées par la faiblesse des prix des denrées, des régimes d'indemnisation ont été lancés au niveau local. D'autres pays ont également maintenu leurs programmes de soutien à la production, principalement fondés sur des paiements directs aux agriculteurs et des systèmes de prêts subventionnés. Le *Brésil* a également augmenté ses dépenses pour ses régimes d'assurance-récolte (pour la deuxième année consécutive), tandis que l'*Indonésie* a lancé un programme public de rajeunissement des plantations de palmier à huile axé tout particulièrement sur les petits producteurs.

Développement du secteur: Plusieurs pays, principalement dans la région Asie-Pacifique, ont mis en œuvre diverses mesures de développement du secteur, ciblant en particulier la noix de coco et, dans une moindre mesure, le soja et le palmier à huile. En général, ces mesures visent à: i) réduire la dépendance d'un pays vis-à-vis des importations; ii) augmenter la demande intérieure; iii) favoriser l'ajout de valeur au niveau local et accroître les recettes d'exportation; et iv) promouvoir des systèmes agricoles plus durables et résilients ou poursuivre d'autres objectifs de développement à long terme. Bien que la plupart des initiatives visent à accroître la production, les stratégies pour y parvenir diffèrent considérablement et s'appuient notamment sur: l'expansion des zones cultivées, la distribution de semences à haut rendement, le rajeunissement des plantations, la promotion de nouvelles méthodes de culture, et des garanties en matière de prix.

Mesures de lutte contre les maladies des plantes: Au *Canada*, dans l'*UE* et aux *États-Unis*, l'utilisation du glyphosate, un herbicide largement répandu mais «potentiellement cancérigène», a été remis en question, mais les trois pays ont conclu que ce produit chimique ne semblait pas présenter de risques pour la santé. Néanmoins, l'*UE*, n'a renouvelé l'autorisation du produit que pour une période réduite de cinq ans (contre quinze ans habituellement). Un autre herbicide, le dicamba, a fait l'objet d'une attention particulière de la part des décideurs aux *États-Unis* en raison de ses effets potentiellement négatifs sur les cultures non résistantes, ce qui a abouti à des restrictions dans certains états ainsi qu'à des accords avec les fabricants pour la mise en place de mesures de protection. Dans l'*UE*, une infection bactérienne affectant les oliviers est restée une source de préoccupation et a donné lieu à un regain d'efforts pour améliorer les mesures de détection précoce, de prévention et de lutte contre la maladie.

Réglementation du marché: Plusieurs pays ont ajusté leurs mesures de contrôle des prix visant à soutenir les producteurs ou les consommateurs, bien que dans une moindre mesure qu'en 2016. Les pays ont également continué de recourir à des variations des taxes sur la valeur ajoutée comme instrument de politique. Les programmes d'achats publics, de stockage et d'écoulement des stocks d'oléagineux sont restés en place en *Chine* (où les ventes publiques de soja et d'huile de colza en provenance des réserves publiques ont diminué par rapport aux années précédentes, parallèlement à la suppression progressive des achats publics) ainsi qu'en *Inde*, en *Indonésie* et au *Sri Lanka*. Bien que l'*Inde* ait étendu et rationalisé ses opérations d'achat public, dans l'ensemble, les interventions sont restées localisées et intermittentes. Le *Canada* a renouvelé ses dispositions visant à protéger les agriculteurs contre les flambées des coûts de transport intérieur.

Normes alimentaires: Conformément à des initiatives analogues ailleurs, le *Canada* a interdit les huiles partiellement hydrogénées – la principale source d'acides gras trans nocifs – de la chaîne alimentaire du pays. La *Thaïlande* envisage de faire de même, alors qu'une obligation d'étiquetage et une limite sur la teneur en acides gras trans sont entrées en vigueur en *Inde*. Des seuils pour certains types de graisses et des allégations de santé explicites sur les étiquettes des produits ont également fait l'objet d'attention aux *États-Unis* et au *Pérou*. En outre, un certain nombre de pays ont adopté des mesures de sécurité sanitaire des aliments spécialement ciblées sur le frelatage des huiles végétales. Au niveau international, la Commission mixte FAO/OMS du Codex Alimentarius a publié sa première norme (non contraignante) sur l'huile de poisson, et a en outre modifié un certain nombre d'autres normes en vigueur portant sur divers graines oléagineuses et leurs produits dérivés.

Politiques en matière d'OGM: Dans le cadre d'efforts plus larges visant à faciliter le commerce avec les *États-Unis*, la *Chine* a renouvelé l'autorisation d'importation à des fins d'alimentation animale de sept variétés de graines oléagineuses GM et a accordé une autorisation à deux nouvelles variétés. L'*UE* et la *Turquie* ont également autorisé l'importation de nouvelles variétés GM, de nouveau exclusivement à des fins de consommation (c.-à-d. pas à des fins de culture). Alors que l'*Argentine* a autorisé la culture d'une nouvelle variété de soja GM, l'*Inde* a encore une fois reporté l'approbation de graines de moutarde GM développées localement, qui représentent la première culture alimentaire GM du pays. En revanche, le *Mexique* a révoqué l'autorisation précédemment octroyée à un soja GM après la découverte d'utilisations non autorisées. L'*Australie* envisage d'indemniser les agriculteurs qui ont perdu leurs certifications sans OGM ou biologique en raison d'une contamination par du colza GM. Pour ce qui concerne l'étiquetage obligatoire de la teneur en OGM dans les produits alimentaires, les législateurs du *Canada* ont rejeté les propositions en la matière – contrairement aux *États-Unis*, où de nouvelles réglementations à cet effet devraient entrer en vigueur en 2018.

Politiques relatives aux biocarburants: Un certain nombre de pays (y compris l'*Argentine*, l'*Indonésie*, la *Thaïlande* et les *États-Unis*) ont apporté des modifications à leurs programmes de soutien aux biocarburants, tandis que d'autres (le *Brésil*, le *Canada*, l'*UE* et le *Royaume-Uni*) ont entamé un examen approfondi de leurs politiques en matière de bioénergie. L'*UE* est restée fidèle à son plafond en matière de biocarburants d'origine agricole (qui incluent le diesel à base d'huile végétale), tout en favorisant leur remplacement progressif par des biocarburants «de deuxième génération». L'*Indonésie* a continué de subventionner les producteurs de diesel à base d'huile de palme, mais envisage de répartir ces subventions sur de plus grands volumes en vue de stimuler davantage la production nationale. La *Thaïlande* a continué de moduler son taux de mélange obligatoire afin de stabiliser les prix locaux de l'huile de palme. L'*Argentine* a suspendu ses droits à l'exportation sur le biodiesel pour accroître la compétitivité de ses exportations. Les *États-Unis* ont envisagé de geler ou de réduire leurs cibles en matière de consommation bioénergétique en 2018 et 2019, mais a finalement opté pour une augmentation marginale de la cible «biocarburants avancés», qui s'applique au biodiesel. Pendant ce temps, les législateurs américains n'ont pas délibéré sur la proposition de renouvellement rétroactif du crédit d'impôt accordé au biodiesel qui a expiré fin 2016.

Mesures de politique commerciale: En vue de protéger les intérêts des producteurs et des consommateurs nationaux, l'*Indonésie* et la *Malaisie* ont maintenu les régimes de taxes progressives sur les exportations d'huile de palme. Parallèlement, l'*Argentine*, la *Bolivie* et l'*Inde* ont mis en place de nouvelles mesures de promotion des exportations non tarifaires, alors que les législateurs de l'*Ukraine* ont approuvé un changement de politique favorisant les expéditions d'huiles et de farines plutôt que les exportations de graines oléagineuses.

Pour ce qui est des importations, des préoccupations concernant la précarité de l'offre intérieure (y compris l'offre de matières premières pour les industries de transformation locales) ont incité un certain nombre de pays à assouplir les barrières commerciales. En revanche, d'autres pays ont relevé les barrières à l'importation; cela a été tout particulièrement le cas de l'*Inde*, en vue non seulement de protéger les agriculteurs locaux et d'encourager la production nationale, mais également de soutenir les transformateurs et raffineurs domestiques. Alors que la *Chine* a reporté la mise en œuvre d'une barrière générale non tarifaire sur les importations d'huile végétale en vrac, elle a annoncé un resserrement des exigences phytosanitaires pour le soja importé des *États-Unis*. En outre, la *Chine* a levé une mesure non tarifaire sur l'huile de soja en provenance d'*Argentine*, dans le cadre de vastes discussions visant à équilibrer les échanges entre les deux pays.

Plusieurs vastes accords commerciaux bilatéraux sont en cours de négociation ou sont entrés en vigueur en 2017 – concernant souvent d'importants pays exportateurs/importateurs de graines oléagineuses et portant notamment sur le colza. Au niveau mondial, un nouvel accord international sur l'huile d'olive est entré en vigueur. De plus, en 2017, de nombreuses initiatives commerciales bilatérales spécifiques aux produits oléagineux ont vu le jour, en particulier en ce qui concerne l'huile de palme. Ces initiatives visent à: i) promouvoir les exportations (y compris des mesures ciblant les industries naissantes de biodiesel); ii) satisfaire les besoins d'importation; iii) faciliter le transfert des savoir-faire techniques (afin de tirer profit des capacités de transformation locales et de stimuler la demande locale); ou iv) résoudre certains obstacles non tarifaires.

L'OMC a rendu une décision sur un différend commercial entre l'UE et l'Indonésie concernant les alcools gras de palme et n'a constaté que des violations mineures du règlement de l'OMC. D'autre part, en réponse à une décision de l'OMC de 2016, l'UE a levé les droits antidumping sur les importations de biodiesel à base de soja en provenance d'Argentine, tandis que les États-Unis ont imposé des droits antidumping et compensateurs sur les importations de biodiesel en provenance d'Argentine et d'Indonésie. Parallèlement, la Chine a confirmé les droits antidumping et compensateurs sur les drêches sèches de distillerie (un substitut de la farine de soja) importées des États-Unis.

Infrastructures de transport: Le Brésil a accru ses efforts visant à améliorer la logistique d'entreposage et de transport. Apparemment, les investissements, public et privé, ont contribué à améliorer considérablement les infrastructures routières, portuaires et fluviales dans le nord du Brésil – faisant passer la capacité annuelle totale d'expédition à 40 millions de tonnes métriques de céréales, ce qui a favorisé un désengorgement des routes d'expédition traditionnelles vers le sud. En outre, le Brésil et la Chine ont mis en place un fonds d'investissement commun pour les projets d'infrastructure, étant donné que le traitement des goulots d'étranglement dans la logistique du transport au Brésil pourrait réduire de façon significative les coûts d'expédition vers la Chine, notamment pour le soja.

Durabilité de la production: L'UE a engagé une discussion controversée sur de possibles restrictions – pour des raisons environnementales – sur les importations de certaines huiles végétales destinées à la production de biodiesel. De même, la Norvège a pris des mesures pour mettre fin à l'achat de biodiesel produit de façon supposément non durable. Les gouvernements de l'Indonésie et de la Malaisie ont contesté ces initiatives; ils ont également lancé des systèmes nationaux de certification obligatoire pour l'huile de palme (par opposition à la certification volontaire par le biais de la Table ronde sur l'huile de palme durable, RSPO – organisme de normalisation soutenu par l'industrie et reconnu à l'échelle mondiale), en raison d'exigences trop strictes, de coûts de certification élevés et de l'absence de prise en compte des préoccupations des petits exploitants. Apparemment, en décembre 2017, les taux de certification et les niveaux d'acceptation à l'échelle internationale des deux systèmes nationaux étaient limités. Parmi les autres mesures de réglementation pertinentes figurent: l'extension par l'Indonésie d'un moratoire visant à freiner la déforestation et la pollution provoquées par les feux de forêt; et l'engagement du Pérou à consulter les communautés autochtones avant d'approuver des projets de production d'huile de palme qui pourraient avoir des répercussions sur eux.

MESURES ET INITIATIVES SECTORIELLES

Les normes volontaires du secteur privé ont continué de jouer un rôle important dans l'orientation du complexe oléagineux mondial et, en particulier, du commerce international des graines, des huiles et des farines d'oléagineux.

Production durable: Les normes de l'industrie concernant la production durable d'huile de palme ont continué d'évoluer, comme en témoignent plusieurs nouvelles initiatives visant à promouvoir des pratiques responsables le long de la chaîne de valeur de l'huile de palme. Alors qu'un certain nombre de parties prenantes se sont engagées dans des programmes visant à former les petits exploitants aux pratiques de production durable et à les aider à accéder aux certifications, plusieurs entreprises agroalimentaires mondiales ont renouvelé leurs engagements à l'égard d'un approvisionnement «responsable» et traçable. Dans certains cas, les producteurs se sont engagés à s'abstenir de développer leur production sur des tourbières fragiles sur le plan environnemental ou ont accepté de restaurer des zones de tourbe récemment exploitées. En outre, les établissements de crédit se sont engagés à accorder une attention accrue aux aspects sociaux/environnementaux et ont commencé à évaluer les candidats de l'industrie de l'huile de palme en tenant compte de leurs capacités en matière de durabilité. La pression continue exercée par les consommateurs et d'autres groupes de la société civile a fortement contribué à ces évolutions.

La RSPO, l'organisme de normalisation et certification de l'huile de palme largement utilisé et reconnu par l'industrie à l'échelle mondiale, a entrepris un examen de ses principes et critères, et devrait adopter une nouvelle série de normes plus strictes à la fin de 2018. Pendant ce temps, des questions de conformité ont incité la RSPO à prendre des mesures contre certains membres soupçonnés d'avoir enfreint les codes de pratiques de l'organisation – des cas que les observateurs ont considéré comme importants en vue d'apprécier la capacité de la RSPO à défendre ses propres normes et règlements. La mesure dans laquelle la certification a effectivement contribué à limiter la déforestation reste soumise à débat. Concernant la diffusion plus large de la certification, les parties prenantes de l'industrie ont signalé que les coûts élevés de vérification – combinés à l'absence de sensibilisation des consommateurs et à la faiblesse de la demande d'huile certifiée – constituaient des obstacles majeurs. En effet, les chiffres de la RSPO suggèrent que l'offre mondiale d'huile de palme certifiée reste supérieure aux ventes réelles, et qu'environ la moitié de tous les produits certifiés ne trouve pas d'acheteur. En général, la demande de produits certifiés reste concentrée dans un nombre relativement peu élevé de pays développés, et elle ne progresse que lentement dans les pays en développement – en particulier de grands pays importateurs comme l'Inde, la Chine ou le Pakistan. Sur une note positive, davantage d'acheteurs se sont approvisionnés en huile de palme certifiée directement par le biais de chaînes d'approvisionnement physiques plutôt que par des mécanismes de certificats négociables («book & claim»).

Bien que moins prononcé, les discussions sur la durabilité ont également porté sur d'autres oléagineux. Certains groupes de l'industrie au *Brésil* et dans l'*UE* ont forgé de nouvelles alliances afin de développer une chaîne d'approvisionnement spécifique pour le «soja responsable». Par ailleurs, des évaluations indépendantes du moratoire du *Brésil* sur le soja, qui interdit le financement et le commerce du soja cultivé sur des terres défrichées illégalement dans la région amazonienne, ont suggéré que l'interdiction avait contribué à des formes plus responsables d'expansion de la production. En Asie, une nouvelle initiative publique-privée a été lancée en vue d'établir une chaîne d'approvisionnement durable et certifiée pour la noix de coco. En outre, la *Marine Ingredients Organisation*, l'organisation internationale des producteurs d'huile et de farine de poisson, a amélioré sa norme mondiale concernant l'approvisionnement responsable en matières premières marines.

Normes sur les huiles comestibles: Plusieurs pays ont signalé des efforts visant à améliorer l'authentification et l'identification d'origine en vue de prévenir les pratiques frauduleuses et/ou d'accroître les exportations.

Questions concernant les OGM: La demande pour les produits à base de soja non-OGM s'est encore accrue sur les nouveaux marchés de niche en Europe et en Asie. Apparemment, bien que la production non-OGM ait augmenté à la suite d'investissements privés dans des installations de manutention et de transport spécifiques, la demande totale est restée supérieure à l'offre disponible.

Mesures portant sur les biocarburants: Comme en 2016, diverses initiatives de l'industrie relatives aux biocarburants se sont concentrées sur l'utilisation de matières premières non comestibles pour la fabrication de biodiesel. Ces initiatives se sont élargies au-delà de l'Europe, et concernent désormais des pays dans les Amériques et en Asie-Pacifique, qui s'intéressent notamment à la production de biodiesel à partir d'huile de cuisson usagée. Compte tenu des engagements de réduction des émissions de CO₂ du transport aérien, les combustibles de qualité aéronautique à base d'huile végétale ont également fait l'objet d'une attention accrue.

Commerce international: Des sociétés en *Chine* ont annoncé leur intention de continuer à renforcer leur présence au *Brésil*, en vue d'accroître leur approvisionnement direct en soja – une stratégie appuyée par des investissements dans les infrastructures de stockage et de transport au *Brésil*. Par ailleurs, en *Tunisie*, l'industrie de l'huile d'olive a lancé un programme de promotion des échanges ciblé sur le marché japonais.

Marchés et finance: Afin d'améliorer le processus de détermination des prix et les pratiques de gestion des risques, les bourses agricoles en Asie ont lancé un contrat d'options sur la farine de soja en *Chine* ainsi que des contrats sur les tourteaux de graines de ricin et de moutarde en *Inde*. Aux *États-Unis*, le Chicago Board of Trade a révisé les limites quotidiennes de variation des prix pour les contrats portant sur les farines/tourteaux de soja, tandis que dans l'*UE*, la bourse *Euronext* a lancé de nouveaux contrats sur le colza.

Recherche et développement: Les mesures de R&D concernant les cultures oléagineuses et leurs produits dérivés semblent avoir considérablement augmenté en 2017 par rapport à l'année précédente. Outre les nouvelles variétés de graines oléagineuses, la recherche a porté principalement sur le développement de nouveaux produits, aussi bien à des fins alimentaires que pour des applications industrielles (principalement pour le soja) ou de nouvelles utilisations fourragères. Parmi les faits nouveaux concernant la lutte contre les maladies figurent: des gènes du colza résistant au charbon bactérien, un important ravageur; et des stratégies de lutte contre la rouille du soja en Amérique latine. Dans l'ensemble, le colza a occupé une place importante des stratégies de R&D, soit plus d'un tiers de l'ensemble des initiatives en la matière. Les variétés d'oléagineux à teneur élevée en acide oléique ont également fait l'objet d'une attention particulière, en raison des caractéristiques salutaires des huiles tirées de ces variétés, de leur durée de vie accrue et de leur haute capacité de friture. De plus, les efforts en matière de recherche déployés pour améliorer le potentiel de rendement des palmiers à l'huile et des cocotiers ont été maintenus.

Introducción

La finalidad de este compendio es facilitar, en un único documento, un panorama general de los principales cambios de política y medidas conexas adoptadas por el sector privado en relación con los mercados mundial y nacionales de semillas oleaginosas, aceites, grasas y harinas en un año determinado, en este caso 2017.

El compendio reproduce, en forma tabular, todas las políticas y noticias del sector industrial aparecidas durante 2017 en la publicación FAO *Oilcrops Monthly Price and Policy Update (MPPU)*. El objetivo principal es facilitar la labor de los responsables de las políticas, expertos de mercado, analistas y otras partes interesadas, proporcionándoles un panorama general breve y conciso de las novedades de política pertinentes a la industria de las semillas oleaginosas a nivel mundial, regional y nacional.

Aunque se ha hecho todo lo posible para cubrir las novedades más destacadas y pertinentes, la lista de noticias presentadas no es exhaustiva. Basándose en una variedad de fuentes, los informes presentados se concentran en factores clave, absteniéndose de evaluaciones profundas sobre su impacto.

Las noticias se presentan divididas en dos grupos principales: 1) cambios de política aplicados (u objeto de examen) por los gobiernos nacionales, y 2) iniciativas voluntarias del sector industrial, que incluyen las medidas adoptadas por las empresas privadas, asociaciones del sector, grupos de la sociedad civil e instituciones de investigación y financieras.

En los cuadros, las novedades en materia de políticas nacionales se agrupan por ámbitos de política y por países (en orden alfabético), incluidas las referencias al mes de aplicación y al producto de interés. Por otro lado, las medidas del sector industrial se presentan por tema y en orden cronológico, con indicación del país involucrado.

Agradacimientos: Este informe ha sido elaborado por el equipo semillas oleaginosas de la Dirección de Comercio y Mercados (EST), bajo la dirección de P. Thoenes y con la ayuda de F. Greb, G. Karumathy y M. Milo. Se agradece el apoyo de E. Vecchione que formateó este informe.

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Aspectos más destacados

En las siguientes líneas se presentan de manera resumida los cambios de política y tendencias más relevantes observadas en 2017. En los cuadros que figuran a continuación (disponibles sólo en inglés) se proporciona información más detallada.

POLÍTICAS GUBERNAMENTALES

Apoyo a la producción: *China* continuó aplicando políticas de apoyo a la producción destinadas a recortar la producción de maíz (junto con reformas del sistema nacional de reservas de cereales), alentando al mismo tiempo el cultivo de soja, colza y otros usos de la tierra, incluidos los períodos de barbecho. Para aumentar la eficacia de sus programas de apoyo a las explotaciones agrícolas, el país sustituyó su sistema de precios indicativos para la soja – en vigor hasta 2016 – por pagos por hectárea disociados de los precios de mercado. En la *India*, los precios mínimos para los cultivos oleaginosos fueron objeto de los ajustes al alza habituales, sin embargo los agricultores y las asociaciones industriales sostuvieron que los aumentos eran insuficientes para compensar el incremento de los costos de producción y subrayaron que las intervenciones en el mercado público seguían siendo demasiado pequeñas para sostener los precios fijados por el Gobierno. Para hacer frente a las situaciones de crisis rural causadas por la debilidad de los precios de los productos básicos, se pusieron en marcha varios sistemas de compensación a nivel estatal. También otros países mantuvieron sus programas de apoyo a la producción, basados principalmente en pagos directos a los agricultores y en programas de préstamos subvencionados. El *Brasil* también aumentó los desembolsos para programas de seguro de las cosechas (por segundo año consecutivo), mientras que *Indonesia* puso en marcha un programa público de rejuvenecimiento de la palma aceitera centrado en los pequeños productores.

Desarrollo del sector: Varios países, principalmente de la región de Asia y el Pacífico, aplicaron diversas medidas de desarrollo del sector, centradas en particular en el coco y, en menor medida, en la soja y la palma aceitera. Por lo general, estas medidas tenían por objeto: i) reducir la dependencia de las importaciones del país; ii) satisfacer la creciente demanda interna; iii) fomentar el valor añadido local y aumentar los ingresos de exportación; y iv) promover sistemas agrícolas más sostenibles y resilientes o perseguir otros objetivos de desarrollo a largo plazo. Aunque la mayoría de las iniciativas se centraron en impulsar la producción, las estrategias para lograrlo difirieron ampliamente e incluyeron la expansión de la superficie, la distribución de semillas de alto rendimiento, el rejuvenecimiento de las plantaciones, la promoción de nuevos métodos de cultivo y la garantía de precios.

Medidas de lucha contra las plagas: En el *Canadá*, los *Estados Unidos* y la *UE*, el glifosato, un herbicida ampliamente utilizado aunque “posiblemente cancerígeno”, se sometió a examen, pero los tres países llegaron a la conclusión de que era probable que el producto químico no planteara riesgos para la salud. Sin embargo, la *UE* renovó la autorización del producto sólo por un período abreviado de cinco años (en lugar de los quince habituales). Otro herbicida, Dicamba, recibió especial atención en los *Estados Unidos* debido sus efectos potencialmente negativos en los cultivos no resistentes, lo que dio lugar a restricciones estatales específicas y a acuerdos con los fabricantes en relación con las medidas de protección. En la *UE*, la infección bacteriana que afecta a los olivos siguió siendo motivo de preocupación, lo que dio lugar a nuevos esfuerzos por mejorar las medidas de detección precoz, prevención y control de la enfermedad.

Regulación del mercado: Aunque en 2017 tuvieron menos importancia que en el año anterior, varios países ajustaron las medidas de control de precios con el fin de apoyar a los productores o a los consumidores. Los cambios en los impuestos sobre el valor añadido también siguieron utilizándose como instrumento de política. Las compras públicas, el almacenamiento y las ventas en subastas se mantuvieron en *China* (donde las ventas públicas de soja y aceite de colza procedentes de las reservas estatales se redujeron en comparación con años anteriores, junto con la eliminación gradual de las compras públicas), así como en la *India*, *Indonesia* y *Sri Lanka*. Si bien la *India* amplió y simplificó sus operaciones de contratación pública, en general las intervenciones siguieron siendo localizadas e intermitentes. El *Canadá* renovó sus disposiciones para proteger a los agricultores contra el aumento de los costos de expedición internos.

Normas alimentarias: En consonancia con esfuerzos similares desplegados en otros lugares, el *Canadá* prohibió el uso de aceites parcialmente hidrogenados – que son la principal fuente de grasas trans nocivas – en la cadena alimentaria nacional. *Tailandia* consideró seguir el ejemplo, mientras que en la *India* se impuso tanto un límite al contenido de grasas trans, así como el etiquetado obligatorio. Los umbrales para ciertos tipos de grasa y las declaraciones explícitas de propiedades saludables en las etiquetas de los productos también recibieron atención en los *Estados Unidos* y el *Perú*. Además, varios países introdujeron medidas de inocuidad de los alimentos dirigidas específicamente a luchar contra la adulteración de los aceites vegetales. A nivel internacional, la Comisión FAO/OMS del Codex Alimentarius publicó su primera norma (no vinculante) relativa al aceite de pescado, además de deliberar sobre modificaciones de otras normas existentes relativas a los cultivos oleaginosos y los productos derivados.

Políticas en materia de OMG: En el marco de amplios esfuerzos para facilitar el comercio con los *Estados Unidos*, *China* renovó la autorización de importación para uso para piensos de siete variedades de semillas oleaginosas modificadas genéticamente y la concedió para dos nuevas variedades. La *UE* y *Turquía* también autorizaron la importación de nuevas variedades transgénicas, exclusivamente con fines de consumo (es decir, no para cultivo). Mientras que la *Argentina* autorizó el cultivo de una nueva variedad de soja transgénica, la *India* volvió a postergar la aprobación de una semilla de mostaza transgénica desarrollada localmente que representaba el primer cultivo alimentario transgénico del país. Por otra parte, *México* revocó una aprobación anterior de una soja transgénica después de detectar un uso no autorizado. *Australia* consideró la posibilidad de compensar a los agricultores que perdieran su certificación de libres de transgénicos, o de orgánicos debido a la contaminación por semillas de colza transgénica. En cuanto al etiquetado obligatorio del contenido de transgénicos en los productos alimenticios, los legisladores *canadienses* rechazaron las propuestas correspondientes, contrariamente a los *Estados Unidos*, donde se prevé que las nuevas reglamentaciones a tal efecto entren en vigor en 2018.

Políticas en materia de biocombustibles: Varios países (entre ellos la *Argentina*, los *Estados Unidos*, *Indonesia* y *Tailandia*) introdujeron ajustes en sus programas de apoyo a los biocombustibles, mientras que otros (el *Brasil*, el *Canadá*, el *Reino Unido* y la *UE*) emprendieron exámenes exhaustivos de sus políticas actuales en materia de bioenergía. La *UE* mantuvo su compromiso de limitar el consumo de biocombustibles obtenidos a partir de cultivos (que incluyen el diésel derivado de aceites vegetales), sustituyéndolos progresivamente por biocombustibles de “segunda generación”. *Indonesia* continuó subvencionando a los productores de diésel a base de palma, pero consideró la posibilidad de extender las subvenciones a un volumen mayor con miras a estimular aún más la producción nacional. *Tailandia* siguió ajustando su tasa de mezcla obligatoria en un intento por estabilizar el precio nacional del aceite de palma. La *Argentina* suspendió sus derechos de exportación sobre el biodiesel para aumentar la competitividad de sus exportaciones. Los *Estados Unidos* consideraron la posibilidad de congelar o reducir sus objetivos de consumo de bioenergía para 2018 y 2019, pero finalmente optaron por un aumento marginal del objetivo de los “biocombustibles avanzados”, que se aplica al biodiesel. Mientras tanto, los legisladores estadounidenses no deliberaron sobre la propuesta de renovación retroactiva del crédito fiscal al biodiesel en el país, que expiró a finales de 2016.

Medidas de política comercial: Con el fin de proteger los intereses de los productores y consumidores nacionales, se mantuvieron los regímenes impositivos móviles para las exportaciones de aceite de palma en *Indonesia* y *Malasia*. Al mismo tiempo, la *Argentina*, *Bolivia* y la *India* aplicaron nuevas medidas no arancelarias de promoción de las exportaciones, mientras que los legisladores de *Ucrania* aprobaron un cambio de política para fomentar los envíos de aceite y harina, en contraposición a las exportaciones de semillas oleaginosas.

Por lo que respecta a las importaciones, la preocupación por las dificultades de los consumidores y los suministros nacionales adecuados (incluidos los suministros de materias primas para las industrias de transformación locales) indujo a varios países a reducir las barreras comerciales. Por el contrario, se erigieron barreras a la importación en otros lugares, especialmente en la *India*, para proteger a los agricultores locales y fomentar la producción nacional, pero también en un intento de apoyar a los elaboradores y refinadores nacionales. Si bien *China* postergó la aplicación de una barrera no arancelaria general para las importaciones de aceite vegetal a granel, el país anunció un endurecimiento de los requisitos fitosanitarios para la soja importada de los *Estados Unidos*. Además, *China* suprimió una medida no arancelaria sobre el aceite de soja argentino, como parte de amplias conversaciones sobre el equilibrio comercial entre ambos países.

En 2017 se negociaron o entraron en vigor varios acuerdos comerciales bilaterales de gran alcance, en los que a menudo participaron importantes países exportadores e importadores de semillas oleaginosas y que se referían en particular a la colza. A nivel mundial, entró en vigor un nuevo acuerdo internacional sobre el aceite de oliva. En 2017 también se llevaron a cabo numerosas iniciativas comerciales bilaterales específicas para los cultivos oleaginosos, especialmente con respecto al aceite de palma, dirigidas a: i) la promoción de las exportaciones (incluidas las medidas destinadas a las industrias nacientes de biodiesel); ii) la satisfacción de las necesidades de importación; iii) la facilitación de la transferencia de conocimientos técnicos (para aprovechar la capacidad de elaboración local y estimular la demanda local); o iv) la eliminación de una serie de barreras no arancelarias.

La OMC se pronunció sobre un litigio comercial entre la *UE* e *Indonesia* relativo a los alcoholes grasos de aceite de palma, encontrando sólo violaciones menores de la reglamentación de la OMC. Por otra parte, en respuesta a un fallo de la OMC de 2016, la *UE* levantó los derechos antidumping sobre las importaciones de biodiesel a base de soja procedentes de *Argentina*, mientras que los *Estados Unidos* impusieron derechos antidumping y antisubvenciones sobre las importaciones de biodiesel procedentes de *Argentina* e *Indonesia*. Mientras tanto, *China* confirmó los derechos antidumping y antisubvenciones del país sobre los residuos desecados de destilería (un sustituto de la harina de soja) importados de los *Estados Unidos*.

Infraestructura de transporte: El *Brasil* intensificó sus esfuerzos para mejorar la logística de almacenamiento y transporte del país. Según se informa, tanto la inversión pública como la privada contribuyeron a mejorar considerablemente la infraestructura vial, fluvial y portuaria del norte del *Brasil* – lo que dio lugar a una capacidad total anual de transporte de 40 millones de toneladas de granos y a una descongestión de las rutas tradicionales de transporte hacia el sur. Además, el *Brasil* y *China* crearon un fondo de inversión conjunto para proyectos de infraestructura, ya que abordar los cuellos de botella del transporte en el *Brasil* puede reducir de manera significativa los costos de envío a *China*, especialmente para la soja.

Sostenibilidad de la producción: La *UE* entabló un debate controvertido sobre la posible restricción – por razones medioambientales – de determinadas importaciones de aceite vegetal destinadas a la producción de biodiesel. Asimismo, *Noruega* adoptó medidas para poner fin a la adquisición de biodiesel supuestamente no sostenible. Los gobiernos de *Indonesia* y *Malasia* objetaron estas iniciativas; también lanzaron sistemas de certificación nacionales obligatorios para el aceite de palma (a diferencia de la certificación voluntaria a través de la Mesa redonda sobre el aceite de palma sostenible, RSPO – el órgano de establecimiento de normas para el aceite de palma respaldado por la industria y reconocido mundialmente), aduciendo requisitos demasiado estrictos, altos costos de certificación y la falta de atención a las preocupaciones de los pequeños productores. Según se informa, en diciembre de 2017, las tasas de certificación y los niveles de aceptación internacional de los dos sistemas nacionales eran limitados. Otras medidas regulatorias dignas de mención son la extensión por parte de *Indonesia* de una moratoria destinada a detener la deforestación y la contaminación por incendios forestales y el compromiso del *Perú* de consultar a las comunidades indígenas antes de aprobar proyectos relacionados con el aceite de palma que las afecten.

MEDIDAS E INICIATIVAS DEL SECTOR INDUSTRIAL

Las normas voluntarias del sector privado siguieron desempeñando un papel importante en la conformación del sector mundial de semillas oleaginosas y, en particular, en el comercio internacional de semillas oleaginosas, aceites y harinas.

Producción sostenible: Las normas del sector industrial para el aceite de palma sostenible siguieron evolucionando, como lo evidencian varias iniciativas nuevas que promueven prácticas responsables a lo largo de la cadena de valor del aceite de palma. Mientras que varias partes interesadas se comprometieron en programas para capacitar a los pequeños agricultores en prácticas de producción sostenible y apoyar su inclusión en la certificación, varias empresas agro-comerciales internacionales renovaron sus compromisos con el abastecimiento “responsable” y trazable. En algunos casos, los productores se comprometieron a abstenerse de desarrollar turberas frágiles desde el punto de vista ambiental o aceptaron restaurar zonas de turba recientemente desarrolladas. Además, las instituciones crediticias se comprometieron a prestar mayor atención a los aspectos ambientales y sociales y comenzaron a seleccionar a los solicitantes de la industria del aceite de palma tomando en cuenta su historial de sostenibilidad. La constante presión de asociaciones de consumidores y de otros grupos de la sociedad civil contribuyó en gran medida a esta evolución.

La RSPO, el órgano de establecimiento de normas y certificación para el aceite de palma mundialmente utilizado y dirigido por la industria, inició una revisión de sus principios y criterios, esperando adoptar un conjunto de normas revisadas y más estrictas a finales de 2018. Mientras tanto, problemas de cumplimiento impulsaron a la RSPO a tomar medidas contra algunos miembros por presunta violación de los códigos de práctica de la organización – casos que los observadores consideraron importantes pruebas de la capacidad de la RSPO de hacer cumplir sus propias normas y reglamentos. La medida en que la certificación contribuyó realmente a limitar la deforestación siguió siendo objeto de debate. En cuanto a la mayor difusión de la certificación, las partes interesadas de la industria señalaron como obstáculos principales a los altos costos de auditoría, combinados con la falta de conciencia de los consumidores y la débil demanda de aceite certificado. De hecho, las cifras de la RSPO sugieren que la oferta mundial de aceite de palma certificado siguiera superando las ventas reales, dado que aproximadamente la mitad de todos los productos certificados no encontraron comprador. En general, la demanda de productos certificados siguió concentrándose en un número relativamente pequeño de países desarrollados, y sólo se registraron moderados aumentos en los países en desarrollo, en particular en los grandes importadores como la *India*, *China* o el *Pakistán*. Como aspecto positivo, más compradores pasaron de abastecerse de aceite de palma certificado a través de los mecanismos “book & claim” a comprar a través de cadenas de suministro físicas.

Aunque mucho menos importantes, los debates sobre la sostenibilidad también se centraron en otros cultivos oleaginosos. Grupos industriales del *Brasil* y la *UE* forjaron nuevas alianzas para desarrollar una cadena de suministro dedicada a la “soja responsable”. Además, evaluaciones independientes de la moratoria de la soja en el *Brasil*, que prohíbe el financiamiento y el comercio de soja cultivada en tierras ilegalmente desbrozadas en la región amazónica, sugieren que la prohibición ha contribuido a formas más responsables de aumento de la producción. Mientras tanto, en Asia, una nueva iniciativa público-privada apuntaba a establecer una cadena de suministro de coco sostenible certificada. Además, la Marine Ingredients Organisation, el organismo que representa a la industria mundial de harina y aceite de pescado e ingredientes marinos, mejoró su norma mundial para el suministro responsable de materias primas marinas.

Normas para aceites comestibles: Varios países comunicaron que se habían adoptado medidas para mejorar la autenticación y determinación del origen con miras a prevenir las prácticas fraudulentas y/o mejorar los resultados de las exportaciones.

Cuestiones relativas a los OMG: La demanda de productos de soja no modificados genéticamente ha crecido aún más en los mercados especializados emergentes de Europa y Asia. Aparentemente, aunque la producción de productos no modificados genéticamente aumentó gracias a las inversiones privadas en servicios específicos para la manipulación y el transporte, la demanda total siguió superando la oferta disponible.

Medidas relativas a los biocombustibles: Al igual que en 2016, varias iniciativas industriales relacionadas con los biocombustibles se centraron en el uso de materias primas no comestibles para la producción de biodiesel. Estas se expandieron más allá de Europa, involucrando a países de las Américas y de Asia y el Pacífico, a menudo explorando la producción de biodiesel a partir de aceite de cocina usado. En vista de los compromisos mundiales de reducción de las emisiones de CO₂ de las compañías aéreas, también se prestó mayor atención a los combustibles derivados de aceites vegetales para la aviación.

Comercio internacional: Algunas empresas de *China* anunciaron planes para seguir expandiendo su presencia en el *Brasil*, con miras a ampliar el abastecimiento directo de soja – una política complementada por las inversiones en infraestructura de almacenamiento y transporte en el *Brasil*. Además, la industria del aceite de oliva *tunecina* puso en marcha un programa de promoción comercial destinado al mercado japonés.

Mercados y finanzas: Para mejorar la determinación de los precios y reforzar las prácticas de gestión de riesgos, las bolsas de productos básicos agrícolas de Asia lanzaron un contrato de opciones de harina de soja en *China*, así como contratos de tortas de semillas de ricino y mostaza en la *India*. En los *Estados Unidos*, la bolsa Chicago Board of Trade revisó los límites de cambio de precios diarios para los contratos de soja/harina, mientras que la bolsa *Euronext* de la *UE* lanzó nuevos contratos de semillas de colza.

Investigación y desarrollo: Los ejemplos de medidas de investigación y desarrollo relativas a los cultivos oleaginosos y productos derivados parecen haber aumentado considerablemente en 2017 en comparación con el año anterior. Además de las nuevas variedades de semillas oleaginosas, la investigación se centró principalmente en el desarrollo de productos, abarcando tanto aplicaciones industriales alimentarias como no alimentarias (principalmente para la soja), así como nuevos usos para piensos. Entre los avances relacionados con el control de las plagas figuran los genes de la colza resistentes al carbunco sintomático, una de las principales plagas, así como las estrategias de control de la roya de la soja en América Latina. En general, la colza ocupó un lugar destacado, representando más de un tercio de todas las actividades de investigación y desarrollo. Las variedades de cultivos oleaginosos de alto contenido de ácido graso oleico también recibieron bastante atención, dado el perfil saludable de los respectivos aceites, su mayor vida útil y su alta aptitud para la fritura. También continuaron los esfuerzos de investigación para mejorar el potencial de rendimiento de la palma aceitera y la palma de coco.

Table 1. Overview of domains covered

Government policies	Industry measures and initiatives
AGRICULTURAL SUPPORT POLICIES	INDUSTRY STANDARDS
- Production support	- Sustainable oil palm
- Sector development measures	- Sustainable soy
- Pest control measures and regulations	- Sustainable coconut
- Relief measures	- Sustainable fishoil/meal
BIOFUEL POLICIES	- Food products
MARKET POLICIES	GMO ISSUES
- Market regulation	BIOFUEL / BIOENERGY
- Public procurement & stockholding	OVERSEAS INVESTMENT & TRADE PROMOTION
TRADE POLICIES	TRANSPORT INFRASTRUCTURE
- Import measures - non-tariff	MARKETS & FINANCE
- Import measures - tariffs & levies	RESEARCH & DEVELOPMENT
- Export measures - tariff & non-tariff	- Pest control
- Trade disputes	- Varietal research
- Comprehensive trade agreements	- Product development
- Product-specific bilateral initiatives	
FOOD STANDARDS & FOOD SAFETY POLICIES	
FEED STANDARDS	
GMO POLICIES	
OTHER POLICIES	
- Production sustainability	
- Consumption taxes	
- Social policies	
- Transport infrastructure	

Table 2. Government policies implemented in 2017

No.	Domain	Country	Month	Product	Description *
1	AGRICULTURAL SUPPORT POLICIES – <i>Production support</i>	Argentina	May	Soybean	Argentina's Ministry of Agriculture determined that the subsidy provided to soybean farmers in the country's disadvantages northern regions will amount to ARS 290 per tonne (USD 18). Farmers producing up to 2 000 tonnes will be entitled to have their entire production subsidized, whereas caps will be applied to larger producers. For the 2016/17 campaign, the Government budgeted total outlays under the programme at ARS 1 000 million (USD 62.9 million). As part of efforts to revitalize the economy of the country's northern regions, the Government also awarded new contracts to lay railway tracks in the provinces of Jujuy and Salta. Argentina's northern provinces are viewed as one of the few areas with potential for grain and oilseed production to expand, especially assuming improved transport infrastructure. Currently, the region accounts for about 10 percent of national soybean output.
2	AGRICULTURAL SUPPORT POLICIES – <i>Production support</i>	Brazil	January	Agricultural crops	The Government of Brazil presented its pre-crop financing scheme for the 2017/18 crop year. The programme will allow medium-sized producers to purchase agricultural inputs (seeds, fertilizers and pesticides) for the 2017/18 season at a preferential interest rate of 8.5 percent. This year's credit line will total BRL 12 billion (USD 3.83 billion) – up 20 percent from last year's level. The maximum amount each farmer can borrow has been set at BRL 780 000 (USD 250 000).
3	AGRICULTURAL SUPPORT POLICIES – <i>Production support</i>	Brazil	June	Agricultural crops	The government of Brazil presented its agricultural support package for the 2017/18 season. In the forthcoming season, commercial farming will be granted access to loans worth BRL 188.3 billion (USD 57.9 billion) – a 2.5 percent increase from last year's level, which, however, compares to a 2016-2017 inflation rate of about 4 percent. In 2017/18, about 80 percent of agricultural funding will be allotted to loans for production and marketing operations and 20 percent to on-farm investment loans. The latter will attract most of the year-on-year increase in financial resources, with special attention given to investments in on-farm stock-holding facilities and improved production technologies. Overall, some 80 percent of the loans will be provided at concessional interest rates of 7.5–8.5 percent, which compares to rates of 8.5–9.5 percent applied last season. The remainder will be offered at market rates – with the Central Bank's benchmark rate standing at 10.25 percent in May 2017. The borrowing limits for individual farm households will remain unchanged from last year. Separate from the above loan programmes, the Government pledged to raise public outlays for crop insurance subsidies for the second year in succession (reaching BRL 550 million, or USD 169 million), while funds specifically earmarked for family farms will remain unaltered at BRL 30 billion (USD 9.21 billion).
4	AGRICULTURAL SUPPORT POLICIES – <i>Production support</i>	China	March	Arable crops	In a policy statement, the Government of China confirmed earlier plans to gradually modify the country's crop structure, encouraging farmers to expand soybean production as well as maize production for silage, while reducing maize production for grain (see <i>MPPU June & Nov. '16</i>). As to the nation-wide target price for soybeans and Heilongjiang's soybean production subsidy, no adjustments have been announced in preparation of the forthcoming 2017/18 plantings.

No.	Domain	Country	Month	Product	Description *
5	AGRICULTURAL SUPPORT POLICIES – <i>Production support</i>	China	May	Arable crops	China's Ministry of Agriculture issued guidelines concerning the future distribution of arable land as part of the country's national food security strategy. In order to ensure the effective allocation of agricultural resources across the country, during the next three years, 60 million ha of land would be earmarked for the cultivation of rice, wheat and maize, and an additional 19 million ha for soybeans, rapeseed, cotton, sugar and rubber. For soybeans and rapeseed, respectively 6.7 and 4.7 million ha of protected land will be identified. The new policy is meant to help optimize the country's agricultural production pattern, while making agricultural support programmes more effective. The country's investments in fixed assets, transfer payments, and planned reforms in agricultural lending will concentrate on the target areas.
6	AGRICULTURAL SUPPORT POLICIES – <i>Production support</i>	China	May	Soybean	In China's northeastern grain belt, farmers will continue to receive subsidies for growing soybeans and maize, based on area planted. Government officials confirmed that, for the 2017/18 crop, the subsidy provided for soybean cultivation would remain above that for maize, in order to encourage farmers to shift additional acreage from maize to soybeans. Soybean payments will be de-coupled from market prices, replacing the target price system in place from 2014 to 2016 (see also <i>MPPU June/Nov.'14 & Nov.'16</i>). The exact amount of the area-based subsidies will only be determined later in the season. In the meantime, provincial officials will compile detailed land statistics to determine the farmers' eligibility for the subsidy. The central Government plans to allocate a lump sum for each subsidy to the concerned provinces, entrusting provincial authorities with the calculation and distribution of the subsidy to individual farmers.
7	AGRICULTURAL SUPPORT POLICIES – <i>Production support</i>	China	June	Soybean, maize	The Government of China informed that public outlays for payments to encourage crop rotation will total CNY 2.56 billion in 2017, compared to CNY 1.44 billion last year (respectively USD 376 million and USD 212 million). Farmers will continue to receive per-hectare subsidies for rotating their maize crops with other crops (notably soybeans) every other year as well as to leave some land fallow (see also <i>MPPU June'17</i>). Reportedly, the area targeted by the subsidies has been raised to 800 000 hectares, about 85 percent more than last year. Payments will be concentrated in the country's northeastern provinces (where, in recent years, maize expanded at the expense of soybeans) and to areas deemed unsuitable for maize cultivation.
8	AGRICULTURAL SUPPORT POLICIES – <i>Production support</i>	China	September	Soybean, maize	According to private sources, the subsidy granted to soybean producers in Heilongjiang Province (China's top soybean growing region) has been set at CNY 118.58 per mu (USD 268 per ha) for the 2016/17 season, i.e. for the crop harvested in the fall of last year. The payment, which is part of the target price subsidy programme that was operated on a pilot basis from 2014 to 2016 (see <i>MPPU Nov.'16 & June'17</i>), is supposed to reach farmers by 15 September 2017. For comparison, in 2015/16, the subsidy amounted to CNY 150 per mu (USD 339 per hectare). From 2017/18, the target price system will be discontinued and producer payments will be de-coupled from market prices (see also <i>MPPU July'17</i>). Two types of producers will be eligible to receive payments: (i) farmers who rotate maize with other crops – primarily soybeans, but also tubers and minor grains, beans and other oilseeds; and (ii) farmers that keep land idle to rehabilitate degraded farmland and conserve moisture in marginal agricultural areas. Support payments are meant to ensure that farmer incomes will not suffer from idling land or rotating crops that earn lower returns. Reportedly, the compensation for idling land that could bear two crops a year will amount to CNY 800 per mu, whereas CNY 500 per mu will be granted for single-season fallow (respectively USD 1 810 and 1 132 per ha). Details on subsidy levels for crop rotation are not yet available.

No.	Domain	Country	Month	Product	Description *
9	AGRICULTURAL SUPPORT POLICIES – <i>Production support</i>	China	November	Soybean, maize, wheat	In Heilongjiang Province, support payments provided to maize growers have been lowered to CNY 133.46 per mu (USD 303 per ha), down 13 percent compared to last year's level. The measure reflects efforts to curb national maize production and eventually lower domestic stocks – while encouraging farmers to plant alternative crops, notably soybeans. At the same time, for soybeans, the target-price subsidy that was in place for the last three seasons has been replaced by an area-based grower subsidy amounting to CNY 173.46 per mu (USD 393 per ha). Meanwhile, the countrywide minimum purchase price for wheat for 2018 was set at CNY 2 300 per tonne (USD 348), 2.5 percent lower than this year and the first cut in over a decade. The latter change is part of Government efforts to bring domestic wheat prices more in line with both the international market and local production costs, while increasing flexibility of the country's grain reserve system. Furthermore, the Government plans to subsidize grain transportation and storage facilities. Under this policy, projects designed to build or upgrade grain transportation or storage facilities along main railways and ports will be subsidized in a bid to improve market efficiency and curb distribution costs.
10	AGRICULTURAL SUPPORT POLICIES – <i>Production support</i>	India	January	Agricultural crops	Seeking to minimize the impact of last November's demonetization measure on the farm sector (see also <i>MPPU Dec.'16</i>), the Government of India has given its ex-post facto approval for a two-month interest waiver for farmers who took up short-term crop loans from cooperative banks. Reportedly, many farmers faced difficulties in carrying out Rabi crop operations due to the lower availability of cash that followed demonetization.
11	AGRICULTURAL SUPPORT POLICIES – <i>Production support</i>	India	March	Copra	The Government of India has set the 2017 procurement price for milling and ball copra at, respectively, INR 65 000 (USD 1 004) and INR 67 850 (USD 1 048) per tonne – i.e. 9 percent above last year's level. India's Commission for Agricultural Costs and Prices had recommended the increase in the minimum support price (MSP), based on the analysis of (i) production and processing costs, (ii) trends in domestic and international prices of edible oils, (iii) the overall demand and supply situation for copra and coconut oil, and (iv) the likely impact of MSPs on consumers. The new MSP for copra is aimed at ensuring remunerative prices for farmers and stimulating investment in coconut, thereby raising production and productivity in the country's coconut industry.
12	AGRICULTURAL SUPPORT POLICIES – <i>Production support</i>	India	June	Agricultural crops	The states of Maharashtra, Punjab and Uttar Pradesh agreed to partially waive farm loans to address growing rural distress caused by low crop prices following oversupply. India is holding large levels of food grains from last year's record harvest, while exports have stalled for a number of reasons. Maharashtra and Punjab intend to forgive the equivalent of, respectively, USD 5.27 billion and USD 1.5 billion in farm loans, effectively writing off debts of many small farm holdings. Reportedly, the measures could benefit close to 10 million farmers, with write-offs of up to INR 150 000–200 000 per farmer (USD 2 325–3 100).
13	AGRICULTURAL SUPPORT POLICIES – <i>Production support</i>	India	June	Agricultural inputs	According to media sources, the Central Government exhorted private companies to lower the prices of pesticides, seeds and other agricultural inputs to support public initiatives taken to assist farmers.

No.	Domain	Country	Month	Product	Description *
14	AGRICULTURAL SUPPORT POLICIES – <i>Production support</i>	India	June	Oilcrops	In India, market prices for soybeans and other oilseeds reportedly dropped below MSP levels. To protect farmers from the recent price declines and prevent a shift in plantings away from soybeans and other oilseeds to competing crops, the Government raised the MSPs for Kharif oilcrops by 4–10 percent and to renew the special bonuses reserved for crops characterized by widening domestic supply deficits. Public officials warned that buying oilcrops below the government-set prices would attract prosecution. Including bonuses, the MSPs for 2017/18 have been set as follows: soybeans INR 30 500 per tonne (USD 473), up 10 percent from last year's level; groundnuts-in-shell INR 44 500 per tonne (USD 690), up 5.5 percent; sunflowerseed INR 41 000 per tonne (USD 635), up 3.8 percent; sesamum INR 53 000 per tonne (USD 821), up 6 percent; and nigerseed INR 40 500 (USD 627), up 5.9 percent. For comparison, the support prices for paddy, maize, pulses and cotton have been raised by, respectively, 5 percent, 4 percent, 7–8 percent, and 4 percent. Farmers and industry associations maintained that public market interventions continue to be insufficient to support the MSPs. They also renewed their calls for other remedial actions, in particular higher import duties on vegetable oils. Reportedly, the latest erosion in soybean market prices has been triggered by poor demand from local crushers and unusually large old-crop inventories, which essentially stem from uncompetitive prices of domestically produced soybean oil vis-à-vis imported vegetable oils.
15	AGRICULTURAL SUPPORT POLICIES – <i>Production support</i>	India	August	Oilcrops, pulses	The state Government of Madhya Pradesh announced the launch of a scheme to compensate farmers for distress sales at prices below the minimum support prices (MSP) that are set annually by the central Government. The scheme will initially apply to selected oilseeds and pulses, where physical procurement tends to be limited unlike for rice and wheat. The initiative comes on the back of a bumper harvest that caused crop prices to decline, triggering protests by farmers calling for loan waivers and more remunerative prices (<i>see also MPPU July'17</i>). Under the scheme, farmers will be compensated when crops are sold at less than the MSP. Such deficiency payments will be capped at a modal price, which is defined as the average market price observed over a two-month period in Madhya Pradesh and two other states.
16	AGRICULTURAL SUPPORT POLICIES – <i>Production support</i>	India	September	Coconut	The Government of Kerala (the country's second largest coconut growing state) urged the central government Commission for Agricultural Costs and Prices to raise the minimum support price (MSP) of copra from INR 67 700 per tonne to INR 97 250 per tonne (respectively USD 1 035 and 1 487). Reportedly, the Agricultural Department is also considering to introduce a MSP for raw coconut amounting to INR 29 500 per tonne (USD 451). Currently, there is no MSP for the procurement of raw coconut.
17	AGRICULTURAL SUPPORT POLICIES – <i>Production support</i>	India	November	Oilseeds	Minimum support prices for Rabi crops (which are sown in November/December of this year for harvest during the first half of 2018) have been raised from last season's level. For rapeseed and safflowerseed, they have been set at, respectively, INR 4 000 and INR 4 100 per quintal (USD 624 and 639 per tonne), up 8 and 11 percent year-on-year. For comparison, support prices for pulses have been raised by 8–10 percent and those for Rabi grains by 6–7 percent. Market observers pointed out that the increases may be insufficient to offset higher production costs. More importantly, oilseeds growers would only benefit from the higher support prices if state agencies actually scaled up crop procurement at the established prices.
18	AGRICULTURAL SUPPORT POLICIES – <i>Production support</i>	India	December	Toria	India's central Government has raised the minimum support price for 'toria' (<i>brassica rapa subsp. oleifera</i>), an oilseed variety mainly grown in Rajasthan, by 9.5 percent to INR 3 900 per quintal (USD 614 per tonne).

No.	Domain	Country	Month	Product	Description *
19	AGRICULTURAL SUPPORT POLICIES – <i>Production support</i>	Indonesia	March	Oil palm, maize	According to government officials, Indonesia plans to encourage independent palm oil farmers to introduce maize intercropping in their plantations – a measure meant to boost domestic maize production and thus reduce the dependence on imported crops. Under the plan, maize would be introduced in nearly one million hectares of oil palm plantations by the end of 2017. The government would provide seeds and subsidized fertilizer to farmers who join the programme. Planting oil palm and maize side by side is expected to improve land use efficiency, raise productivity and increase farmers' incomes.
20	AGRICULTURAL SUPPORT POLICIES – <i>Production support</i>	Indonesia	May	Oil palm	In 2017, Indonesia's Oil Palm Estate Fund – the state agency set up in 2015 to collect a levy on crude palm oil exports (see <i>MPPU July '15</i>) – plans to support the Government's oil palm replanting scheme with an allocation of IDR 500 billion (USD 37.6 million). The national scheme is aimed at raising productivity levels on small, independently run plantations, where average yields reportedly stalled at 1.7 tonnes of palm oil per ha – as opposed to up to 5.7 tonnes achieved on corporate-run plantations. Low productivity levels are primarily attributed to poor quality seeds and to the circumstance that palms are cultivated beyond their productive age. Private sources pointed out that the government's initiative faces important administrative hurdles in that many of the targeted farmers are not able to prove their land ownership – a prerequisite for participating in replanting programmes.
21	AGRICULTURAL SUPPORT POLICIES – <i>Production support</i>	Indonesia	November	Oil palm	Indonesia's Government launched an oil palm rejuvenation scheme for small oil palm growers, in a bid to raise yields in smallholder plantations (see also <i>MPPU June '17</i>). The scheme will be funded by Indonesia's Oil Palm Estate Fund, an instrument set up in 2015 to collect levies on palm oil exports (see <i>MPPU July '15</i>). Reportedly, the new scheme will cover 20 000 ha of smallholder plantations in a first phase. Actually, out of 4.7 million ha cultivated by smallholders nationwide, some 2.4 million ha are said to require replanting – either because palms have surpassed their productive age or because poorly performing varieties were used when plantations were established. Reportedly, high-yielding varieties allow annual yields of 8 tonnes of palm oil per ha, compared to the current average of 2 tonnes. Only farmers whose plantations have earned ISPO (Indonesian Sustainable Palm Oil) certification will be allowed to participate in the replanting programme. Designed to promote sustainable production practices and ensure compliance with national laws, ISPO certification has been made mandatory for companies, while remaining voluntary for smallholders. In order to qualify for certification, farmers need to prove legal ownership of their land – a requirement that not all smallholders are able to fulfill, according to social advocacy groups.
22	AGRICULTURAL SUPPORT POLICIES – <i>Production support</i>	Kazakhstan	January	Agricultural crops	The Government of Kazakhstan presented a programme for the development of the country's agro-industrial complex in 2017–2021. In addition to improved access to subsidies for small/medium-sized farmers, an expanded farm insurance scheme and higher irrigated land area, the plan envisages incentives to reduce wheat cultivation in favour of coarse grains and oilseeds. Starting next year, per hectare subsidies for wheat producers could be cut strongly, while those for maize would fall less and those for soybeans, rapeseed and other oilseeds would be raised.
23	AGRICULTURAL SUPPORT POLICIES – <i>Production support</i>	Kazakhstan	November	Oilseeds	Further to the reforms announced earlier this year (see <i>MPPU Feb. '17</i>), government officials informed that per-hectare oilseed subsidies will be converted to payments per tonne delivered by farmers to local crushers. Reportedly, the subsidy is aimed at improving the supply of local oilseed crushers with domestic raw materials. The subsidy applied to farmer deliveries will amount to KZT 4 000, or USD 12, per tonne (and would compare to a purchase price of KZT 25 000, or USD 74, per tonne paid by millers).

No.	Domain	Country	Month	Product	Description *
24	AGRICULTURAL SUPPORT POLICIES – <i>Production support</i>	Mexico	May	Agricultural crops, oilseeds	While the country's main programmes in support of agricultural production are set to remain in place, the Government announced cuts in the amount of subsidies provided to individual farmers in 2017, providing the following details: i) under the country's Pro-Oilseeds programme, support payments will drop from MXN 1 500 to MXN 700 per tonne of oilseeds produced (USD 83 to USD 39); ii) under PROAGRO, the flat rates per ha for arable crops will be lowered for commercial farms but not for subsistence farmers; and iii) the percentage of hedging operation costs receiving support will be reduced from 85 to 75 percent.
25	AGRICULTURAL SUPPORT POLICIES – <i>Production support</i>	Turkey	January	Agricultural crops	In a bid to diversify the country's agricultural production, raise productivity levels and reduce the cultivation of water-intensive crops in structurally disadvantaged areas, the Government of Turkey has launched a new agricultural subsidy programme. Under the new scheme, 19 strategic crops – including soybean, sunflower, safflower and rapeseed – will be eligible for public support, starting this year. Subsidies will be allocated based on climate and soil conditions prevailing in each zone, and will be disbursed in two annual instalments. Markets observers expect farmers' planting decisions to be affected by the new system; in particular, in some areas, farmers could replace maize with cotton, oilseeds, pulses and wheat.
26	AGRICULTURAL SUPPORT POLICIES – <i>Sector development measures</i>	Burkina Faso	January	Soybean	The Government of Burkina Faso joined forces with two associations representing the French vegetable oils/protein sector to develop the country's soybean sector. To address Burkina Faso's growing demand for vegetable oil and protein (to be used for human consumption and animal feed), the project aims at lifting annual domestic soybean output from currently 20 000 tonnes to 100 000 tonnes by 2022. Interventions will focus on (i) raising productivity and yields in the field, (ii) strengthening producer organizations, (iii) consolidating the processing sector, (iv) creating a national soybean association, and (v) establishing a sector development fund.
27	AGRICULTURAL SUPPORT POLICIES – <i>Sector development measures</i>	Canada	May	Rapeseed	A public-private research partnership to develop advanced high-yielding rapeseed varieties has been set up in Canada, in a bid to uphold the competitiveness of the country's rapeseed sector. The new platform will operate under Canada's Genomic Applications Partnership Program (GAPP) and is set to benefit from co-funding by the provincial Government of Ontario.
28	AGRICULTURAL SUPPORT POLICIES – <i>Sector development measures</i>	European Union	June	Soybean	The Governments of Germany and Hungary proposed an EU-wide initiative – called "EU Soya Declaration" – promoting the production of non-GM soybeans and other legume crops for food and feed. The programme is meant to contribute to the development of more sustainable and resilient agricultural systems, while taking into account growing demand for GM-free foods. The initiative is also designed to tackle the bloc's high rate of dependency on imported soybeans, which supposedly makes European agriculture vulnerable to external market conditions. Reportedly, several EU member states are ready to back the declaration. Back in 2013, concerned by the dearth of non-GM soy on the EU market, the private sector launched an initiative to promote the importation of GM-free soy from Brazil, with a view to offer European consumers the choice to buy non-GM food products (see <i>MPPU June'13</i>).

No.	Domain	Country	Month	Product	Description *
29	AGRICULTURAL SUPPORT POLICIES – Sector development measures	European Union	July	Soybean	In June, thirteen EU member states signed the 'European Soya Declaration' (see also <i>MPPU July'17</i>). The declaration supports national and EU-wide initiatives to increase the production of legume crops, notably soybeans, as a contribution to the development of more sustainable and resilient agricultural systems in Europe. Signatories underlined the initiatives' potential role in boosting the production of non-GM soya in Europe and in reducing the bloc's dependence on imported soybean. Reacting to the intergovernmental initiative, industry associations representing the EU's grain, oilseed and feed sector called for a coherent strategy to address the region's protein deficit. In this regard, the associations pointed out that the EU's latest proposals on biofuels – viz. the gradual phasing out of crop-based biofuels – could translate into falling EU oilcrop production (in particular rapeseed), hence reducing the availability of protein-rich meals. As to the objective of promoting sustainable and resilient production systems, industry representatives drew attention to progress made by European stakeholders and their overseas partners in responsible sourcing. Finally, with regard to non-GM soya, the industry maintained that the non-GM/GM status was not a criterion for sustainability and recommended that the choice for one or the other quality be left to the market.
30	AGRICULTURAL SUPPORT POLICIES – Sector development measures	India	March	Coconut palm	The Indian Coconut Development Board agreed to support 38 projects worth INR 600 million (USD 9.3 million). Out of the total, 32 projects will focus on coconut processing and product diversification, three on market promotion, and three on research. The Board's financial contribution will amount to INR 91 million (USD 1.4 million). The projects will be located in the states of Kerala, Karnataka, Tamil Nadu and Andhra Pradesh.
31	AGRICULTURAL SUPPORT POLICIES – Sector development measures	India	May	Oil palm	In a bid to reduce the nation's reliance on imported edible oil, India's Federal Government will step up its efforts to promote oil palm cultivation across the country (see also <i>MPPU June'16</i>). Restrictions on providing assistance to plantations cultivating more than 25 ha will be relaxed, and criteria for distributing support payments (for planting material, manuring, irrigation, inter-cropping and maintenance costs) are set to be revised. Both measures are aimed at attracting private entrepreneurs, corporate entities and cooperative bodies towards palm oil. The changes will be implemented in 133 districts across 12 states, primarily in the southern part of the country. For 2016, India's total area under oil palm cultivation was estimated at 300 000 ha (comprising immature area), with average yields lingering around 0.5 tonne of oil per ha due to insufficient rainfall. In the meantime, roughly 60 percent of the country's edible oil requirements continue to be satisfied through imports, with palm oil accounting for about 75 percent of the country's edible oil import bill.
32	AGRICULTURAL SUPPORT POLICIES – Sector development measures	India	May	Oil palm	The Government of Telangana will promote the establishment of oil plantations on 12 000 hectares in the eastern part of the state. The state subsidy on palm seedlings will be raised from INR 56 to INR 80, which leaves the farmer with a cost of about INR 10 per plant (1 USD = 64 INR). Some 450 000 seedlings are being raised in local nurseries in support of the programme.
33	AGRICULTURAL SUPPORT POLICIES – Sector development measures	India	September	Coconut	India's Coconut Development Board announced that it will support 30 projects with an aggregate value of INR 313.4 million (USD 4.8 million). The board's own financial contribution will amount to INR 63.9 million (USD 0.98 million). The approved projects will be implemented in five different states and comprise 8 research projects and 22 projects on processing and product diversification.

No.	Domain	Country	Month	Product	Description *
34	AGRICULTURAL SUPPORT POLICIES – <i>Sector development measures</i>	India	September	Coconut	The Government of Kerala announced a 10-year plan to support the development of the state's problem-stricken coconut sector. Growing farming costs, low productivity levels and stagnating incomes have been identified as main difficulties afflicting the sector. Complementing Kerala's efforts, the Federal Government is planning to set up a committee to coordinate coconut related activities of central and state-level agencies, including the Agriculture Department, Kerala Agricultural University, the Central Plantation Crops Research Institute, the Coconut Development Board and Kerafed (the apex co-operative federation of coconut farmers in Kerala and India's largest producer of coconut oil).
35	AGRICULTURAL SUPPORT POLICIES – <i>Sector development measures</i>	India	September	Mustard seed	Reportedly, 'System Root Intensification' (SRI), a cultivation method popular in rice farming, has been successfully tested on mustardseed and other species of the brassica family in five states in India. Allegedly, the technique, which involves planting of saplings instead of sowing seeds, allows to significantly increase yields. The method entails: (i) transplanting 8–15 days old saplings at relatively larger distance; (ii) preferring natural compost to synthetic fertilizer; (iii) early and regular weeding; and (iv) careful water management. The labour intensive method is said to be suitable for farmers with small land holdings and spare labour force. Farmers are advised to use conventional (non-GM) long-duration varieties developed by the Indian Agricultural Research Institute.
36	AGRICULTURAL SUPPORT POLICIES – <i>Sector development measures</i>	Indonesia	January	Coconut	For 2017, the Government of Indonesia has allocated IDR 28 billion (USD 2.1 million) to improve domestic coconut production, according to the local press. Higher domestic output is needed to meet growing demand for raw materials by local industries. Reportedly, Indonesia's countrywide coconut cultivation programme will include (i) carrying out a complete inventory on coconut; (ii) rejuvenation of coconut stands in key growing regions; (iii) mapping high-yielding mother palms for seedling production; and (iv) strengthening existing and setting up new nurseries.
37	AGRICULTURAL SUPPORT POLICIES – <i>Sector development measures</i>	Indonesia	August	Oil palm	The Government of Indonesia issued an oil palm replanting plan involving 4.7 million hectares of plantation. The initiative is aimed at boosting the crop's productivity. Reportedly, average yields dropped to 2–3 tonnes of palm oil per hectare due to the deteriorating age structure of the country's oil palms.
38	AGRICULTURAL SUPPORT POLICIES – <i>Sector development measures</i>	Iran (Islamic Republic of)	June	Soybean	The Government of the Islamic Rep. of Iran and the UN Food and Agriculture Organization launched a two-year technical cooperation project for the promotion of sustainable oilseed production in the country, with particular attention given to the soybean value chain. Ultimately, the project aims at reducing the country's strong dependence on imported oilseed products: currently, about 90 percent of domestic vegetable oil and oilmeal consumption are met through imports.
39	AGRICULTURAL SUPPORT POLICIES – <i>Sector development measures</i>	Kenya	March	Coconut palm	Kenya's Nuts and Oilcrops Directorate announced that it will distribute 2.1 million quality coconut seedlings to farmers in the country's coastal region to boost production and strengthen the coconut value chain (see also <i>MPPU Mar.'15</i>). To raise productivity, farmers will be encouraged to replace senile and non-productive trees. Reportedly, the main problems affecting Kenya's coconut sector are: lack of adequate research; poor agronomical practices; lack of appropriate and affordable technology; exploitation by middlemen; and lack of access to credit facilities by the smallholder farmers.

No.	Domain	Country	Month	Product	Description *
40	AGRICULTURAL SUPPORT POLICIES – Sector development measures	Morocco	May	Olive oil	As part of their continuing support to Morocco's olive oil sector, FAO and the European Bank for Reconstruction and Development (EBRD), in collaboration with Interprolive, Morocco's olive oil industry association, organized a series of workshops to strengthen the country's olive oil sector. The initiative brought together public and private stakeholders. Discussions focused on how to improve the sector's inter-professional organization and ensure quality production. In the meantime, Interprolive started providing technical assistance to its members and launched a campaign to encourage Moroccan consumers to buy better quality olive oil packaged in bottles.
41	AGRICULTURAL SUPPORT POLICIES – Sector development measures	Nigeria	June	Oil palm	According to press reports, Nigeria's Raw Materials Research & Development Council (RMRDC) distributed 10 000 seedlings of a high-yielding oil palm variety to farmers associations and cooperatives with a view to (i) boost the production of raw materials for the country's vegetable oil industry, (ii) diversify agricultural production, and (iii) reduce reliance on imported products (see also <i>MPPU June/Nov. '14 & Aug. '15</i>). The initiative is linked to a federal programme aimed at developing one million hectares of oil palm over five years. Reportedly, RMRDC will also collaborate with private sector investors to promote the establishment of vegetable oil refining and oleochemical plants in the country.
42	AGRICULTURAL SUPPORT POLICIES – Sector development measures	Pakistan	March	Rapeseed	A state-funded project for enhancing oilseed productivity has been launched in Pakistan's Khyber Pakhtunkhwa Province. The project, which was designed to provide high-quality certified rapeseed to farmers, will include the multiplication, procurement and marketing of a high-yielding rapeseed variety. The project will be implemented in collaboration with the private seed business and local extraction industry.
43	AGRICULTURAL SUPPORT POLICIES – Sector development measures	Pakistan	November	Sunflower seed	To stimulate domestic oilseed production and thus help reduce the country's dependence on edible oil imports, farmers cultivating sunflower seed in Punjab Province will receive a subsidy of PKR 5 000 per acre (USD 45 per ha). The local Government also plans to set up regional sunflower procurement centers (in cooperation with the country's solvent extractors association), to ensure that farmers receive the guaranteed price of PKR 62 500 per tonne (USD 568).
44	AGRICULTURAL SUPPORT POLICIES – Sector development measures	Philippines	September	Coconut	The Government of the Philippines has allocated PHP 1.4 billion (USD 27.2 million) to the country's Coconut Authority for the year 2018, matching the current year's level. According to the agency, the bulk of the resources will be used for replanting coconut trees nationwide. Projects on fertilization, R&D and diversification into high-value coconut products will also be supported. With regard to plantings, the agency's target is to support the planting of at least 10 million palms in 2017, 15 million palms in 2018, and 20 million palms yearly starting in 2019.
45	AGRICULTURAL SUPPORT POLICIES – Sector development measures	Philippines	December	Coconut	The Philippine Coconut Authority plans to distribute 20 million coconut seedlings during the 2018–2020 period via its national replanting programme, in a bid to revitalize the country's coconut industry (see also <i>MPPU July'16 & Oct.'17</i>).
46	AGRICULTURAL SUPPORT POLICIES – Sector development measures	Russian Federation	September	Fish oil/meal	As part of its newly issued long-term development strategy for the country's fishing industry, the Government of the Russian Federation intends to raise domestic production of fishmeal, fishoil and fish feed from pelagic species, with a view to support growth in the nation's aquaculture industry.

No.	Domain	Country	Month	Product	Description *
47	AGRICULTURAL SUPPORT POLICIES – Sector development measures	Sri Lanka	March	Coconut palm	In Sri Lanka, the Ministry of Primary Industries and the Ministry of Plantations are planning to jointly launch a programme to increase domestic coconut cultivation. A key objective of the initiative will be to cater for growing international demand for high value-added coconut products.
48	AGRICULTURAL SUPPORT POLICIES – Sector development measures	Sri Lanka	May	Coconut	Given the prevailing shortage of coconut in the domestic market, the Government of Sri Lanka is considering to liberalize the importation of husked coconuts and fresh coconut kernel. The Government may also allow investment into fresh coconut milling capacity, with a view to foster domestic value addition and exports. According to government officials, a fast-growing international market for value-added coconut products (such as virgin coconut oil, coconut milk and coconut cream) has opened new opportunities for local processors.
49	AGRICULTURAL SUPPORT POLICIES – Sector development measures	Sri Lanka	September	Coconut	The Government of Sri Lanka set aside LKR 200 million (USD 1.3 million) for the development of coconut production in the country's Northern and Eastern provinces. Public interventions will concentrate on: (i) identifying suitable land; (ii) the establishment of nurseries and distribution of plantlings; (iii) setting up model coconut gardens; and (iv) infrastructure development.
50	AGRICULTURAL SUPPORT POLICIES – Sector development measures	Sri Lanka	November	Oil palm	Attracted by growing international demand for palm oil, Sri Lankan plantation companies are planning to expand the country's area under oil palm cultivation and are calling for increased public support to do so. Reportedly, the central Government envisages total cultivated area to reach 20 000 hectares, compared to 8 500 hectares at present. However, industry experts pointed out that plantation companies face resistance at the local government and provincial council level.
51	AGRICULTURAL SUPPORT POLICIES – Sector development measures	Thailand	March	Coconut palm	Thai coconut production is reported to have declined steadily over the past five years because of drought and destructive pests. To address the resulting supply shortages and halt imports of coconut products, the government has instructed state agencies to develop action plans for boosting domestic production. The plans should focus on expanding the country's plantation area and promoting suitable high-yielding coconut varieties.
52	AGRICULTURAL SUPPORT POLICIES – Sector development measures	Ukraine	March	Soybean	The Government of Ukraine pledged to support further growth in domestic soybean production. Reportedly, areas where soybean production can be expanded will be identified and the adoption of modern production technologies – including in the field of organic production – will be promoted.
53	AGRICULTURAL SUPPORT POLICIES – Sector development measures	United States	September	Camelina oil	The U.S. Department of Energy has approved a USD 10 million grant to explore ways to raise the oil content of camelina seed using genetic sequencing and modification techniques. The project will be led by Michigan State University. High oil-yielding varieties are expected to attract the interest of U.S. farmers, as camelina can be grown on agriculturally marginal lands, requires limited fertilizer and water, and offers good resistance to pest and disease. Camelina oil has been successfully blended into civil and military aviation fuel. Furthermore, the oil is used as a feed ingredient in aquaculture and lends itself for a variety of pharmaceutical, cosmetic and industrial uses (see also MPPU June'17).

No.	Domain	Country	Month	Product	Description *
54	AGRICULTURAL SUPPORT POLICIES – <i>Sector development measures</i>	Vanuatu, Samoa	March	Coconut palm	The Pacific Community (SPC) and the European Union plan to support the coconut industry in Samoa and Vanuatu as part of a new regional initiative to improve the business competitiveness of small producers. The EUR 3.5 million (USD 3.7 million) Coconut Industry Development Project (CIDP) is expected to improve the livelihood of smallholder farmers in the two countries by supporting innovation in coconut production and strengthening regional market integration. In the Pacific region, the coconut sector supports rural population livelihoods, plays a central role in the diets of people, and contributes to export earnings. New interest in coconut products such as virgin coconut oil, coconut water, coconut sap and timber is said to offer opportunities for the industry's growth.
55	AGRICULTURAL SUPPORT POLICIES – <i>Sector development measures</i>	Vanuatu	August	Coconut	The Government of Vanuatu pledged to support the planting of 1 million coconut trees by 2026. Reportedly, apart from growing old, existing palms have withered because of cyclones. Unproductive trees will be felled and used as timber.
56	AGRICULTURAL SUPPORT POLICIES – <i>Sector development measures</i>	Zambia	September	Palm oil	According to press reports, the Zambian Government has provided equity finance to a local palm oil venture in a bid to help reduce the country's dependence on imports of crude palm oil and cooking oils. Reportedly, the public-private partnership will focus on the development of oil palm plantations, including out-grower schemes for local farmers and the establishment of a palm oil mill. By supporting the production and processing of crude palm oil, the project – once it reaches full capacity – is expected to help substitute 70 000 tonnes of cooking oil imported into Zambia.
57	AGRICULTURAL SUPPORT POLICIES – <i>Sector development measures</i>	Zimbabwe	July	Soybean	According to media reports, the Government of Zimbabwe is planning to launch – with support from the private sector – a loan facility to support the country's oilseed farmers in a bid to stimulate domestic production, especially of soy. Funding would be directed primarily to irrigation infrastructure and farmer purchases of seeds, fertilizers and pesticides. Reportedly, the country's oilseed producers' association already identified farmers willing to sow a total of 60 000 hectares in the forthcoming season.
58	AGRICULTURAL SUPPORT POLICIES – <i>Sector development measures</i>	Zimbabwe	August	Soybean	For the 2017/18 season, the Government of Zimbabwe fixed the price for soybeans delivered to the state-owned Grain Marketing Board at USD 610 per tonne, i.e. 22 percent above the prevailing price of USD 500. The measure is meant to stimulate domestic soybean production, thus helping to reduce the country's dependence on imported edible oil.
59	AGRICULTURAL SUPPORT POLICIES – <i>Pest control measures & regulations</i>	Brazil, Paraguay, Bolivia	May	Soybean rust	Scientists, industry representatives and government officials from Brazil, Paraguay and Bolivia set up a working group to combat the spreading of soybean rust (a fungal disease that affects soybeans and other leguminous crops) in South America. In Brazil, one of the most effective measures to combat the disease has been the enforcement of a soybean-free period of 3–4 months when no live soybean plants are permitted along fields or around storage and transport facilities, to hinder the movement of rust spores from one growing season to the next (see <i>MPPU May & Aug. '15</i>). The working group will look into the possibility of implementing similar restrictions in Paraguay and Bolivia. Furthermore, coordinated efforts are envisaged to slow down the disease's increasing resistance to commonly employed pesticides.

No.	Domain	Country	Month	Product	Description *
60	AGRICULTURAL SUPPORT POLICIES – <i>Pest control measures & regulations</i>	Brazil	July	Soybean rust	The Brazilian state of Mato Grosso do Sul is preparing to join the states of Mato Grosso, Goiás and Paraná in imposing an annual soybean-free period to help control the spread of Asian soybean rust from one growing season to the next. The measure would ban the so-called <i>safrinha</i> crop, i.e. the practice of planting a second crop of soybeans in the same field during the same growing season. Even though <i>safrinha</i> soybeans only account for a very small acreage in Mato Grosso do Sul, scientists confirmed the crucial importance of the ban in their efforts to control the disease. Once the measure will become effective in the named state, about two thirds of Brazil's soybean area will be subject to <i>safrinha</i> restrictions. (See also <i>MPPU June '17 on efforts to introduce similar restrictions in neighbouring Paraguay and Bolivia.</i>)
61	AGRICULTURAL SUPPORT POLICIES – <i>Pest control measures & regulations</i>	Brazil	November	Fungicide	A fungicide developed primarily to combat Asian soy rust has received regulatory approval in Brazil. Commercialization of the new product is expected to begin before the start of the 2018/19 crop.
62	AGRICULTURAL SUPPORT POLICIES – <i>Pest control measures & regulations</i>	Canada	May	Herbicide	Canada's Food Inspection Agency (CFIA) determined that glyphosate – a herbicide widely used in the cultivation of oilseeds, other arable crops and fruits – is neither genotoxic nor likely to pose a human cancer risk and that dietary exposure associated with use of the herbicide is unlikely to pose significant risks to human health. The agency's decision follows similar judgements in the European Union (see <i>MPPU Dec. '15 & Apr. '17</i>) and the <i>United States</i> (see <i>MPPU Nov. '16</i>).
63	AGRICULTURAL SUPPORT POLICIES – <i>Pest control measures & regulations</i>	Canada	September	Insecticide	Citing safety concerns, Canada's health authorities proposed a complete phase-out of an insecticide known by the commercial name 'matador'. The pesticide, which is widely used in rapeseed cultivation, controls pests such as flea beetles, cutworms, bertha armyworms and diamondback moths. Farmers have been invited to share their comments about the envisaged measure with Canada's Pest Management Regulatory Agency. According to industry representatives, the proposed ban would greatly harm rapeseed growers and the industry as a whole. Observers also pointed out that Canada ought to align its regulations with other countries such as the United States, due to the large amount of rapeseeds that is exported.
64	AGRICULTURAL SUPPORT POLICIES – <i>Pest control measures & regulations</i>	European Union	January	Xylella fastidiosa	The European Commission has launched a multidisciplinary research programme aimed at improving the prevention, early detection and control of <i>xylella fastidiosa</i> , a bacterial disease responsible for the quick wilting and dieback syndrome that destroyed olive trees in southern Italy and has been detected in neighbouring countries (see <i>MPPU Nov./Dec. '16</i>). The four-year project will benefit from the collaboration of 29 research centers located in 14 countries around the world. The principal objective is to prevent the spread of the disease and develop a comprehensive integrated management strategy, so as to mitigate the economic, environmental and social aspects of epidemic conditions worldwide. Proposed actions will be complementary to other on-going efforts. Reportedly, the <i>xylella fastidiosa</i> pathogen originated in Brazil and is widely distributed in the American continent, from where it travelled to the Old World via infected plant material.

No.	Domain	Country	Month	Product	Description *
65	AGRICULTURAL SUPPORT POLICIES – <i>Pest control measures & regulations</i>	European Union	March	Herbicide	The European Chemical Agency (ECHA) reckons that there are no grounds to classify glyphosate (a herbicides used extensively on oilcrops and grains worldwide) as a carcinogen, as a mutagen or as toxic for reproduction. The agency informed that its assessment was based on available scientific evidence and preceded by close consultations with all relevant stakeholders. ECHA's opinion had been requested by the European Commission when it renewed the EU license for glyphosate last year (see <i>MPPU July '16</i>). The Commission is expected to take into account the agency's opinion when it decides – later this year – whether to renew the license further. ECHA's findings tally with an earlier opinion published by the European Food Safety Authority, but contradict a report issued by the WHO's International Agency for Research on Cancer (see <i>MPPU Apr. & Dec. '15</i>). Furthermore, in May 2016, a joint FAO/WHO meeting on pesticide residues concluded that glyphosate is unlikely to pose a carcinogenic risk to humans from exposure through the diet. A number of civil society groups questioned ECHA's assessment. According to Greenpeace, ECHA has not taken into account scientific evidence of cancer in laboratory animals, overlooked the views of independent scientists, and relied on unpublished industry studies. Concerns were also raised about possible conflicts of interest at ECHA.
66	AGRICULTURAL SUPPORT POLICIES – <i>Pest control measures & regulations</i>	European Union	May	Herbicide	Based on the latest state of scientific research and taking into account the findings of a study recently conducted by the European Chemical Agency (see <i>MPPU Apr. '17</i>), the European Commission decided to start consultations with Member States about a possible 10-year renewal of the approval of glyphosate – one of the world's most widely used herbicides. The 18-month approval granted last July is due to expire in December 2017.
67	AGRICULTURAL SUPPORT POLICIES – <i>Pest control measures & regulations</i>	European Union	May	Insecticide	The European Commission is considering to convert the EU's existing temporary moratorium on neonicotinoid-based insecticides into a permanent ban. The allegedly bee-harming pesticides are widely used in the cultivation of rapeseed, sugar beet and other crops. In recent months, farmers' representatives and industry groups disputed the results of studies linking the insecticides to bee declines. They also claimed that producers rely on neonicotinoid products to kill disease-spreading aphids that are resistant to other pesticides (see also <i>MPPU Feb. '17</i>). Experts also pointed out that the proposed ban could lead to other types of pesticides being overused, potentially allowing pests to develop resistance to them.
68	AGRICULTURAL SUPPORT POLICIES – <i>Pest control measures & regulations</i>	European Union	September	Herbicide	The European Commission informed that the Member States vote on whether or not to extend the license for glyphosate-based herbicides has been postponed to later this year, adding that a qualified majority will be needed for the proposed 10-year renewal to go ahead (see also <i>MPPU Apr. & June '17</i>). The 18-month approval granted in 2016 is due to expire in December 2017. The Commission's proposal for a 10-year-extension (instead of the customary 15 years) includes a number of specific provisions that Member States would need to follow when considering applications for glyphosate-based products. Meanwhile, one Member State proposed to consider phasing out glyphosate over a five- or seven-year period. In general, the debate about human health risks associated with the chemical's use remains controversial, in both Europe and elsewhere. In Canada and the United States, recent reviews conducted by regulatory authorities claim that such risks are not significant (see <i>MPPU Nov. '16 & June '17</i>). At the international level, there is also the need to align regulations between trade partners in order to prevent diverging rules from causing trade disruptions.

No.	Domain	Country	Month	Product	Description *
69	AGRICULTURAL SUPPORT POLICIES – <i>Pest control measures & regulations</i>	European Union	November	Herbicide	After a lengthy debate over potential cancer-causing risks of glyphosate, the European Union extended its authorization for the herbicide for an abbreviated period of five years (see also <i>MPPU Oct.'17</i>). Non-renewal of the license, which was scheduled to expire on 15 December 2017, could have led to disruptions in global grain trade. France, which voted against the renewal, announced that it would draw up a plan for phasing out the herbicide's use on its territory over the next three years.
70	AGRICULTURAL SUPPORT POLICIES – <i>Pest control measures & regulations</i>	European Union	December	Xylella fastidiosa	Ten EU member countries agreed on a road map outlining next steps to combat the bacterial disease xylella fastidiosa that was first detected on olive trees in Italy in 2013 and is now present in four member states, threatening a range of crops (see also <i>MPPU Feb.'17</i>). The European Food Safety Authority agreed to update its 2015 risk assessment of the disease, and the European Commission offered to make available EUR 10 million (USD 12.1 million) to support research, improve prevention measures and combat the pest. Concerned countries highlighted the need to i) restrict the movement of risky material within the EU, ii) enhance detection and surveillance and maintain an updated list of locations where the disease is present, and iii) consider containment strategies where eradication is not possible. Currently, no treatment exists for the insect-transmitted pest. The European Union's past focus on culling infected trees in Italy's Apulia region met with resistance by local growers (see <i>MPPU July'16</i>).
71	AGRICULTURAL SUPPORT POLICIES – <i>Pest control measures & regulations</i>	United States	May	Pesticide	According to seed company <i>Monsanto</i> , the US Environmental Protection Agency (EPA) issued registration for <i>tioxazafen</i> , a nematocide said to provide broad-spectrum control of plant parasitic nematodes in maize, soybeans and cotton. Reportedly, EPA's registration will enable US farmers to use the pesticide in 2018, pending state approvals.
72	AGRICULTURAL SUPPORT POLICIES – <i>Pest control measures & regulations</i>	United States	September	Herbicide	Allegedly, in the United States, more than one million hectares of soybeans and other crops vulnerable to the herbicide dicamba (i.e. varieties that were not engineered to resist dicamba) have been damaged this year as a result of sprayings on neighbouring fields. Experts have linked the damage to the herbicide's tendency to vaporize and drift across fields, triggering temporary bans of the controversial herbicide in Arkansas and Missouri. Nation-wide use of the chemical had been approved in November last year by the U.S. Environmental Protection Agency (EPA) – for a limited period of two years and provided that special safety measures were applied (see <i>MPPU Dec.'16</i>). Now, to address the problems encountered and ensure vulnerable plants are adequately protected, EPA is evaluating the following remedial actions: (i) introducing tighter restrictions on when and how to spray dicamba; (ii) requiring enhanced training for users of the herbicide; and (iii) reclassifying the product to prevent the general public from buying it. If implemented, such restrictions could affect farmers' seed purchases: soybean growers might stay away from buying dicamba-resistant varieties – which, this year, accounted for almost one-fourth of the United States' total soybean area.
73	AGRICULTURAL SUPPORT POLICIES – <i>Pest control measures & regulations</i>	United States	November	Herbicide	Following reports of significant crop damage from herbicide drift in the United States' farm belt and Southeast (see <i>MPPU Oct.'17</i>), the U.S. Environmental Protection Agency (EPA) has reached an agreement with the manufacturers of herbicide dicamba on measures to protect neighbouring crops from the chemical's use on GM soybean and cotton fields. Dicamba producers agreed to label changes that impose additional requirements for users of the herbicide. EPA will monitor the success of these changes before deciding whether to allow the herbicide's use beyond the 2018 growing season.

No.	Domain	Country	Month	Product	Description *
74	AGRICULTURAL SUPPORT POLICIES – <i>Pest control measures & regulations</i>	United States	December	Herbicide	Since federal authorities restricted the use of the herbicide dicamba late last year (see MPPU Oct. & Dec.'17), additional, state-specific restrictions have been imposed in Arkansas, Minnesota, Missouri and North Dakota. The measures are meant to reduce instances of the herbicide drifting and damaging neighbouring fields. Agri-business company <i>Monsanto</i> , which markets dicamba-based herbicides along with genetically engineered dicamba-tolerant varieties of soybeans and cotton to help farmers control weeds that developed resistance to other herbicides, maintains that the chemicals are safe when properly applied. Reportedly, <i>Monsanto</i> decided to offer US soy farmers a cash incentive if they agree to use the herbicide on the company's GM soybeans. The recently imposed regulatory restrictions are expected to drive up the costs of using dicamba, which <i>Monsanto</i> is aiming to counter with its cash-back offer.
75	AGRICULTURAL SUPPORT POLICIES – <i>Pest control measures & regulations</i>	United States	December	Herbicide	A draft human risk assessment released by the U.S. Environmental Protection Agency (EPA) concludes that glyphosate – a widely used though controversial herbicide – is not likely to be carcinogenic to humans. The agency added that no other meaningful risk to human health was found when the product is used according to label instructions. EPA has called for public comments on its assessment. The agency's final decision, which is scheduled for 2019, will outline any proposed risk mitigation measures, should these be deemed necessary. Meanwhile, in the state of California, products that may contain glyphosate are required to carry warning labels stating the chemical is known to the state to cause cancer – a decision that has been challenged by US farm groups and producers of the chemical.
76	AGRICULTURAL SUPPORT POLICIES – <i>Relief measures</i>	China	May	All crops	The Government of China plans to introduce new agricultural insurance programmes in selected counties to compensate farmers for crop losses resulting from natural disasters. The new insurance packages would be offered to family farms, large-scale growers and farmers' cooperatives.
77	BIOFUEL POLICIES	Argentina	June	Biodiesel	The Argentine Government suspended the country's export duty on biodiesel for the months of June and July. In April and May, the variable duty, which is reviewed on a monthly basis, stood at, respectively 7.05 percent and 0.13 percent. The duty's suspension is expected to improve the competitiveness of the Argentine biodiesel on the world market, at a time when the country's export prospects are threatened by reduced demand from key buyers, notably the United States (see below and MPPU June '17).
78	BIOFUEL POLICIES	Argentina	December	Biodiesel	The Government announced a rise in the country's variable export tax on biodiesel from zero percent applied in December 2017 to a fixed rate of 8 percent, effective 1 January 2018. Considering that, at the same time, the January export tariff rate for soy oil is going to be lowered to 26.5 percent (from 27 percent applied in December), the tax difference between the two products is set to drop from 27 percent to 18.5 percent. Reportedly, the reduced tax differential could result in negotiations with the United States regarding the country's recently imposed anti-dumping and countervailing duties on imports of Argentine biodiesel (N.B. The United States likened Argentina's tax differential to a subsidy for the country's biodiesel producers – see MPPU Sep.'17). Market observers pointed out that the higher taxation of biodiesel exports could negatively affect Argentina's sales of the fuel to the European Union.

No.	Domain	Country	Month	Product	Description *
79	BIOFUEL POLICIES	Brazil	September	Biodiesel	According to government sources, mandatory blending of biodiesel into regular transport diesel will be raised from 8 percent to 10 percent towards the end of the current year – i.e. more than one year earlier than originally planned (see <i>MPPU Apr.'16</i>). Officials from Brazil's Mines and Energy Ministry expect the National Energy Policy Council to approve the shift to the higher blending mandate by December 2017, in line with efforts to lift the country's biofuel output, reduce imports of mineral oil products, and meet national GHG reduction commitments. Moreover, the Government is expected to announce details about 'RenovaBio', a package of incentives and regulatory measures aimed at (i) raising domestic biofuel production and consumption, (ii) attracting investments, and (iii) fostering competition within the sector.
80	BIOFUEL POLICIES	Brazil	November	Biodiesel	According to industry officials, Brazil's National Energy Policy Council (CNPE) recommended raising the country's mandatory biofuel blending rate to 10 percent in March 2018 – two points above the current 8 percent rate. The Government's original plan only envisaged a one-point increase (to 9 percent) in March 2018, followed by a rate of 10 percent in 2019 (see <i>MPPU Apr.'16 & Oct.'17</i>). CNPE's proposal, which would raise next year's domestic biodiesel production by approximately 1 million tonnes, is now being reviewed by the Government.
81	BIOFUEL POLICIES	Brazil	November	Biodiesel	Brazil Lower House passed 'RenovaBio', a proposed package of incentives and regulatory measures aimed at i) stimulating domestic biofuel production and consumption, ii) attracting investments, and iii) fostering competition within the sector. The bill has yet to be approved by the Senate before it can be signed into law by the country's president. Through the proposed bill, fuel distributors would help meeting Brazil's carbon dioxide emissions targets by selling increased volumes of ethanol and biodiesel.
82	BIOFUEL POLICIES	Brazil	December	Biodiesel	Brazil's Upper House passed 'RenovaBio', the policy package on renewable fuels endorsed by the Lower House last November (see <i>MPPU Dec.'17</i>). Markets expect the bill to be signed into law by the President in the near future. Next steps will include the formulation of: exact mandates for domestic biofuel consumption between 2020 (the new programme's expected year of implementation) and 2030; detailed fuel standards and certification rules; and carbon credits and fiscal/financial/credit incentives for biofuel producers. In addition to bioethanol and biodiesel, the programme will also promote the commercialization of biogas, bio-methane and aviation biofuel.
83	BIOFUEL POLICIES	Canada	December	Biodiesel	The Government of Canada published a regulatory framework outlining the scope and key elements of a national standard for clean fuels. Consultations with all interested parties to work through the standard's technical details will follow. The new standard will focus on reducing carbon intensity across the lifecycle of fuels. Changes in crop demand and land management practices that arise from clean fuel utilization and impact on GHG emissions will be taken into account. The existing federal mandate on blending 2 percent biodiesel and 5 percent ethanol into the country's transportation fuels will be maintained in the short term. However, in the longer term, these volumetric requirements will be replaced with fuel-specific carbon intensity requirements that are expected to become more stringent over time.

No.	Domain	Country	Month	Product	Description *
84	BIOFUEL POLICIES	European Union	December	Biodiesel	The European Council outlined its position regarding the reform of the bloc's Renewable Energy Directive for the period 2021–2030. The Council proposed to retain the existing target of 27 percent renewable energy in total energy consumption in 2030. In the transport sector, the 14 percent target for each member state would be maintained for 2030, with a sub-target of 3 percent for 'advanced biofuels'. Also the existing 7-percent cap for first-generation biofuels (such as vegetable oil-based biodiesel) would be maintained. If a member state sets a lower cap, it would have the option of lowering its overall target for renewables in transport. By comparison, the proposals tabled by the European Commission envisaged a progressive reduction of food-based fuels and their replacement with second-generation biofuels (see <i>MPPU Dec. '16</i>). Also the European Parliament called for more ambitious overall targets and recommended to distinguish between first-generation biofuels produced using sustainable practices and those purportedly produced in an unsustainable manner (see <i>MPPU June '17</i>).
85	BIOFUEL POLICIES	European Union	December	Biodiesel	The European Commission confirmed that rapeseed grown in Canada and Australia would remain eligible for entering the EU market as environmentally-friendly feedstock for biodiesel, as the crops have been shown to meet the bloc's increasingly stringent requirements (N.B. From January 2018, all biodiesel feedstock need to deliver GHG lifecycle savings of 50–60 percent compared to fossil fuels – up from 35 percent in 2017). For Australia, the EU represents a top rapeseed export market, with the bulk of deliveries absorbed by the bloc's biodiesel industry.
86	BIOFUEL POLICIES	Indonesia	March	Biodiesel	According to industry sources, the Government of Indonesia is considering to reduce the amount of subsidy per kiloliter it pays to petrol companies for blending biodiesel so as to spread the total subsidy amount across a larger volume. The move would allow raising domestic biodiesel production – and hence the uptake of local palm oil, the principal biodiesel feedstock – without increasing budgetary outlays. Allegedly, the recent fall in palm oil prices would leave room to use part of the subsidy to raise volumes. Private sources pointed out that the B20 blending mandate (which requires diesel to contain 20 percent biofuel) introduced last year – which only applies to (subsidized) transportation diesel – might be extended to non-subsidized diesel fuel in 2017, possibly boosting domestic biodiesel demand by about 70 percent.
87	BIOFUEL POLICIES	Jamaica	June	Biodiesel	The state-owned Petroleum Corporation of Jamaica has developed diesel containing 5 percent of castor oil-based methylester and is testing the biodiesel on motor vehicles. Reportedly, the Jamaican Government is envisaging the introduction of transport biodiesel, with a view to cut the country's energy import bill and contribute to the reduction of GHG emissions.
88	BIOFUEL POLICIES	Nigeria	March	Biodiesel	Nigeria's Federal Government informed that it is working on a 'Biofuel Policy and Incentives' document, which spells out production and price targets and defines a regulatory framework for domestic biofuels utilization. The policy's objective would be to reduce the country's dependence on fossil fuel and imported petroleum products, while promoting cleaner forms of energy. Support measures would comprise duty and tax breaks as well as the establishment of a Biofuels Equity Investment Fund (backed by parastatals and development banks) to stimulate investment in biofuel production, including cultivation of biofuel-crops. For biodiesel, the specification endorsed by stakeholders is B20, i.e. a blend of diesel and 20 percent biofuel produced from jatropha oil, used palm oil and other non-edible oils.

No.	Domain	Country	Month	Product	Description *
89	BIOFUEL POLICIES	Rwanda	March	Biodiesel	Rwanda's Research and Development Agency (NIRDA) informed that the government decided to abandon a USD 35 million biodiesel project launched four years ago. Reportedly, the government realized that the pilot project was not viable due to insufficient availability of feedstock and high costs of production. The project feasibility study had identified non-edible jatropha oil as key feedstock, but eventually the plant was discovered to be unsuitable for the country's climate. Concerns over using scarce arable land for uses other than food production were also cited.
90	BIOFUEL POLICIES	Thailand	May	Biodiesel	In Thailand, the mandatory biodiesel blending rate of 7 percent has been reintroduced in May 2017. The rate had been temporarily lowered to 5 and 3 percent last year following shortages in domestic palm oil supplies and consumer price hikes (see <i>MPPU Sep.'16</i>). By contrast, in recent months, producer prices dropped sharply amid rising palm oil output, triggering Government measures to support domestic palm oil uptake (see <i>MPPU July'17</i>), including the recent revision in the biodiesel blending rate.
91	BIOFUEL POLICIES	United Arab Emirates	May	Used cooking oil	According to the local press, the country could soon start to turn used cooking oil into biodiesel. Reportedly, the UAE Centre for Waste Management is considering to provide permits to companies to produce biodiesel from leftover cooking oil, fat and grease for use in buses and lorries.
92	BIOFUEL POLICIES	United Arab Emirates	September	Biodiesel	The Emirates National Oil Company (ENOC) announced the launch of a biodiesel blend destined for the country's commercial and industrial segment. The fuel, which contains 5 percent biodiesel produced from vegetable oil, used cooking oil or animal fat, is expected to help reduce the country's GHG emissions. The measure is in line with the government's Energy Plan leading up to the year 2050, which calls for an energy mix combining renewable, nuclear and clean energy sources. Reportedly, the new blend is suitable for use in new and existing trucks as well as heavy construction equipment, without need to upgrade engines and fuel storage facilities.
93	BIOFUEL POLICIES	United Kingdom	September	Biodiesel	The U.K. Government published its long-term strategy for increasing the supply and sustainability of renewable transport fuels in the country. The new policy package is aimed at lowering the GHG intensity of transport fuels, while providing a stable policy environment for investments into renewable low carbon fuels. From April 2018, the share of renewable fuels in total fuel consumption will be lifted to 7.25 percent, further increasing to 9.75 percent in 2020 and 12.4 percent in 2032. The contribution crop-based biofuels can make towards the above obligations will be lowered to 4 percent in 2020, steadily declining to 2 percent in 2032 – a provision that is expected to place a significant demand on waste biofuel feedstock, in particular used cooking oil. Furthermore, a sub-target (as well as special financial incentives) will be introduced for so-called 'development fuels', i.e. high-blend fuels suitable for meeting the long-term goal of decarbonizing the heavy goods vehicle and aviation sectors. Industry representatives claimed that the cap on crop-based fuels was too stringent and unnecessarily limited the market for biofuels with proven GHG reduction potential. Concerns were also expressed that the new policy reduces the U.K.'s competitiveness vis-à-vis other EU member states, where higher caps for crop-based fuels will be in place (see <i>MPPU Dec.'16</i>).

No.	Domain	Country	Month	Product	Description *
94	BIOFUEL POLICIES	United States	January	<i>Camelina sativa</i>	Renewing national efforts to promote research on bio-based fuels, the United States Department of Energy has allocated funds to a research project on <i>camelina sativa</i> , an edible oilcrop adapted to northern climates and suitable for cultivation as a rotation crop in dry areas and on thin soils. Reportedly, research efforts will concentrate on ways to raise productivity in camelina cultivation and to improve camelina oil quality, using a combination of traditional breeding methods and molecular genetics. Chiefly, camelina will be studied for its potential as biofuel feedstock. In recent years, numerous tests have been conducted in the United States and elsewhere with camelina-based transport and aviation fuels, and camelina oil has gained approval as biofuel feedstock by the country's Environmental Protection Agency (see <i>MPPU Apr.'13, Feb./June '16</i>).
95	BIOFUEL POLICIES	United States	May	Biodiesel	The Iowa Infrastructure Fund Bill, which provides USD 3 million in funding for the state's Renewable Fuels Infrastructure programme, has been extended for an additional year until 30 June 2018. Under the programme pump operators receive assistance for the conversion of their equipment to raise renewable fuel sales. Iowa is the United States' leading producer of biodiesel.
96	BIOFUEL POLICIES	United States	May	Biodiesel	Legislation concerning the renewal of the USD 1.00-per-gallon biodiesel tax credit – which expired on 31 December 2016 – has been introduced in the US Congress. The bill envisages the subsidy's extension for 3 years – retroactive from 1 January 2017 and through 31 December 2019. However, the main change concerns the stage in the supply chain that will receive the tax incentive: under the proposed bill, the subsidy would be provided to domestic biodiesel producers rather than blenders. Since its introduction in 2005, the tax incentive was directed to blenders, making no distinction whether the feedstock used was produced domestically or imported from abroad – a provision that has stimulated the importation of competitively priced biodiesel into the country, in part displacing US product. The proposed shift to a producers' credit is aimed at preventing foreign manufacturers from accessing the tax benefit. However, the reform is opposed by some, who argue that the shift would increase profits for a limited number of producers, possibly reducing the overall availability of biodiesel and driving up its price. Previous bids to convert the blenders' credit into a producer incentive have been turned down by the US Congress (see <i>MPPU Aug.'15 & Feb.'16</i>). A separately introduced bill proposes to put an end to federal tax credits for biodiesel produced with animal fats. Allegedly, the current policy distorts the domestic market for animal fats by diverting this important raw material away from the manufacturing of cleaning and personal care products.
97	BIOFUEL POLICIES	United States	June	Biodiesel	Five percent biodiesel blends in home heating oil will become mandatory in New York City and downstate New York counties by, respectively, 1st October 2017 and 1st July 2018. With a view to reduce the region's carbon footprint, New York City mandated 2 percent blends back in 2012, with subsequent increases set to lead to 20 percent blends by 2034. Reportedly, the city is the United States' largest municipal consumer of heating oil.

No.	Domain	Country	Month	Product	Description *
98	BIOFUEL POLICIES	United States	July	Biodiesel	The U.S. Environmental Protection Agency (EPA) published its proposals for mandatory consumption of total, conventional and advanced renewable fuels in 2018, as well as biomass-based diesel in 2019. As in past years, several of the proposed volumes range below the statutory targets set by Congress in 2007, allegedly reflecting the need to account for changing market realities. For 2018, EPA proposed (i) a slight year-on-year drop in the volume of total renewable fuels, which would keep volumes significantly below the congressional target; (ii) to leave non-advanced/'conventional' biofuels (mostly maize-based ethanol) unchanged compared to 2017, compliant with the original targets; and (iii) to lower advanced biofuels from the 2017 level, hence falling short of statutory volumes. Under the 'advanced biofuels' category, volumes of biomass-based diesel produced from vegetable oils and animal fats (which were raised in past years) would remain unchanged in 2019. Furthermore, 'biomass-based diesel' would continue to qualify as well under the 'undifferentiated advanced biofuels' category. EPA invited public comments on the proposed volumes, informing that final figures would be published by 30 November 2017. Representatives of the country's biodiesel industry maintained that EPA's biodiesel proposal continues to underestimate the sector's capacity to produce much higher volumes.
99	BIOFUEL POLICIES	United States	July	Biodiesel	Directly related to the above, in July 2017, a U.S. court ruled that the methodology used by EPA to justify past reductions in biofuel consumption mandates (relative to the statutory targets set by Congress) was incorrect. The ruling was made in response to a petition filed in 2016 by an alliance of biofuel advocacy groups. According to the court ruling, rather than taking into account renewable fuel supplies available to refiners and importers, EPA primarily considered biofuel demand expressed by consumers – a consideration not allowed under the relevant law. The ruling could force EPA to revise upward the consumption targets set for 2016. Reportedly, the court decision resulted in US renewable fuel credits climbing to multi-month highs, while share prices of mineral oil refiners dropped.
100	BIOFUEL POLICIES	United States	August	Biodiesel	Minnesota – the first state in the nation to mandate biodiesel use back in 2005 – is set to raise its biodiesel standard from 10 to 20 percent in May next year. Accordingly, only diesel containing 20 percent biodiesel may be sold between May and October, when fuel stations will switch back to 5 percent, as biodiesel turns from fluid to gel under colder temperatures. The higher blending mandate is meant to (i) help preserve and protect Minnesota's air and water quality, (ii) reduce the state's reliance on fossil fuels, and (iii) support demand for locally grown biodiesel feedstock, notably soybeans. Fuel producers and the trucking industry expressed concern about the new measure, stating that the infrastructure required to handle the higher blends was not yet available.

No.	Domain	Country	Month	Product	Description *
101	BIOFUEL POLICIES	United States	September	Biodiesel	The U.S. Environmental Protection Agency (EPA) is considering to reduce the mandatory renewable fuel consumption targets for 2018 and 2019 that it proposed earlier this year (see <i>MPPU Aug.'17</i>) and is seeking public comments in this regard. Reportedly, EPA decided to revisit its original proposal as new data on production, imports and costs of biodiesel have become available. Allegedly, the price of biodiesel to blenders as well as the price of biodiesel blends to consumers has increased following the expiration of the biodiesel tax credit in December 2016 (see also <i>MPPU June'17</i>). Moreover, prices may continue to rise as a result of the recent preliminary determination of countervailing duties on imports of biodiesel from Argentina and Indonesia (see <i>MPPU Sep.'17</i>), said EPA. Therefore, the agency is concerned that the originally proposed targets may lead to inadequate domestic supplies of biofuel to consumers, and is hence evaluating the possibility of setting lower consumption targets. The domestic biodiesel industry questioned EPA's rationale, stressing that the country's biodiesel production capacity was sufficient to meet the original targets. Recently, the American Soybean Association even urged the agency to raise the target for biomass-based diesel, arguing that biodiesel production creates a value-added market for the country's abundant soybean oil supplies and that the country's growing soybean production could support higher demand for biodiesel without leading to price increases.
102	BIOFUEL POLICIES	United States	November	Biodiesel	Following consultations with lawmakers, the U.S. Environmental Protection Agency (EPA) decided to abandon its recent proposal to lower the mandatory targets for renewable fuel production in 2018 and 2019 (see <i>MPPU Aug. & Oct.'17</i>). The definitive targets announced for 2018 entail i) a fractional increase – compared to 2017 – in the total renewable fuels volume; ii) unchanged levels of non-advanced/conventional biofuels; and iii) a marginal rise for advanced biofuels. Under the 'advanced biofuels' category, volumes of biomass-based diesel have been set at 2.1 billion gallons for both 2018 and 2019 – which compares to 1.9 billion gallons in 2017. The country's biodiesel industry criticized the final targets, arguing that these remain well below the sector's production capacity.
103	MARKET POLICIES – <i>Market regulation</i>	Argentina	January	Planting seed	In 2017, Argentina's national seed agency (INASE) will continue testing farmers' crops for the presence of GM traits, private sources reported. Last year, the government entrusted INASE with this task to facilitate the collection of royalties by seed producers (see <i>MPPU July'16</i>). Reportedly, policy makers and seed companies are working on a permanent seed bill, in replacement of the current temporary arrangement.
104	MARKET POLICIES – <i>Market regulation</i>	Argentina	June	Planting seed	In a bid to ensure full transparency in the domestic seed market and facilitate the collection of royalties by seed producers, the country's Ministry of Agriculture reminded farmers of their obligation to formally declare the quantity and origin of seeds kept on-farm for planting – failing which they face fines and lose the permission to use seeds coming from prior harvests for planting (see also <i>MPPU Feb.'17</i>).
105	MARKET POLICIES – <i>Market regulation</i>	Canada	May	Grains, oilseeds	While Canada's lawmakers continue working on amendments of the country's Transportation Act (see <i>MPPU Dec.'16</i>), the Government is considering extending a temporary revenue cap on rail transports of grains and oilseeds from Canada's Western regions to the country's main ports beyond its current expiry date of 1 August 2017.

No.	Domain	Country	Month	Product	Description *
106	MARKET POLICIES – <i>Market regulation</i>	Thailand	June	Palm oil, biodiesel	The Government of Thailand periodically implements measures to stabilize the domestic price of palm oil in a bid to support producers or consumers. According to media reports, in June 2017, the Government invited retailers of (palm oil-based) biodiesel to increase their stocks of the fuel by 40 percent so as to help absorb excess palm oil supplies and support domestic prices. Reportedly, during the recent production peak the price of palm oil tumbled, hurting farmers. The Government's stock-holding proposal is expected to help absorb an additional 76 000 tonnes of palm oil from the market. To support farmers, the Government also raised the floor price for palm fruit to 4.30 THB per kg (USD 126 per tonne), which, reportedly, has helped to keep the market price for crude palm oil at around THB 23 per kg (USD 674 per tonne).
107	MARKET POLICIES – <i>Market regulation</i>	Thailand	December	Palm oil	Reportedly, towards the end of last year, Thailand's inventories of crude palm oil have swollen to half a million tonnes, causing prices for fresh palm fruit to slide below THB 3.50 per kg – compared to price levels of THB 5.0 in June last year (respectively, USD 110 and 157 per tonne). In a bid to protect growers' incomes, the Government plans to i) foster the uptake of crude palm oil by the country's energy sector, and ii) seek new export opportunities within Asia, notably in China and India. The domestic target price for fresh palm fruit has been set at THB 4.00 per kg, which compares to production costs of about THB 3.80 per kg (USD 125 and 119 per tonne, respectively). Similar measures have been implemented in past years, especially during the rainy season, when high domestic palm oil output tends to depress farm gate prices (see <i>MPPU Apr.'16 & July'17</i>). The Thai Government regularly holds consultations with farmer representatives, processors and consumers to coordinate measures to stabilize domestic palm oil supplies and prices.
108	MARKET POLICIES – <i>Market regulation</i>	Ukraine	June	Sunfloweroil, butter	The Ukrainian Government decided to discontinue, from 1 July 2017, state regulation of food prices, including for sunflower oil and butter. Previously, limits were imposed on rises in market prices, and food manufacturers were required to submit justifications for price changes to the concerned state agency. Reportedly, an experimental suspension of price regulations implemented over a 3-month period last year did not significantly affect consumer prices.
109	MARKET POLICIES – <i>Market regulation</i>	Uzbekistan	November	Vegetable oils, cottonseed meal	According to local press reports, the Government has instructed state agencies to step up efforts to end the unreasonable and artificial overstatement of prices for a number of basic foods and feedstuffs, including vegetable oils and cottonseed meal.
110	MARKET POLICIES – <i>Public procurement & stockholding</i>	China	March	Rapeseed oil	Government 2016/17 auctions of rapeseed oil from state reserves ended in March 2017. From mid-October 2016 to 8 March 2017, a total of 2.08 million tonnes of rapeseed oil have been offered, virtually all of which was bought by traders. During the campaign, average auction prices ranged from CNY 5 904 to CNY 7 172 per tonne (respectively, USD 856 and 1040).
111	MARKET POLICIES – <i>Public procurement & stockholding</i>	China	September	Soybean	Sales of soybeans from state reserves were resumed in September 2017. Reportedly, out of 300 000 tonnes offered, about 215 500 tonnes have been sold, achieving an average price of CNY 3 140 per tonne (USD 474). The soybeans on offer were from old crops (2013 and older), given that, in 2014, the Government changed its agricultural support policies, discontinuing soybean procurement operations.
112	MARKET POLICIES – <i>Public procurement & stockholding</i>	China	November	Soybean	In October 2017, out of a total volume of 253 444 tonnes of soybeans offered for sale from state reserves, only 160 tonnes found a buyer. Reportedly, the 2013 crop soybeans achieved an average price of CNY 3 070 per tonne (USD 464). As of 1 November, state auctions were suspended so as not to disrupt marketing of the new 2017/18 crop.

No.	Domain	Country	Month	Product	Description *
113	MARKET POLICIES – <i>Public procurement & stockholding</i>	India	January	Copra	Last December, India's National Agricultural Cooperative Marketing Federation (NAFED) started procurement of copra in Karnataka state in a bid to protect growers from falling prices of the commodity. In the 2016/17 (July–June) crop year, Karnataka has become the third state after Andhra Pradesh and Tamil Nadu where copra is being bought at the federal support price of INR 59 500 per tonne (USD 890) for milling quality copra and INR 62 400 per tonne (USD 933) for ball copra.
114	MARKET POLICIES – <i>Public procurement & stockholding</i>	India	August	Oilseeds, pulses	India's National Federation of Agricultural Marketing Cooperatives (NAFED) – the agency responsible for the procurement of agricultural commodities under the country's federal Price Support Scheme (PSS) – is preparing the launch of an electronic platform for countrywide procurement of oilseeds and pulses. By managing farm-gate purchases, storage and disposal operations through an efficient, transparent and competitive e-platform, NAFED expects to help growers obtain more remunerative prices, while also containing consumer prices.
115	MARKET POLICIES – <i>Public procurement & stockholding</i>	India	October	Groundnut, soybean	In Gujarat state, public procurement of groundnuts is scheduled to begin on 25 October, government officials informed. Local coconut producer cooperatives (designated by the state-level procurement agencies) will be in charge of the operations. Reportedly, unshelled groundnut will be procured at a rate of INR 45 000 per tonne, as against the prevailing market price of INR 31 250 per tonne (respectively USD 688 and 478). Similarly, in Rajasthan state, public procurement of soybeans and groundnuts commenced in October. Reportedly, 29 procurement centers are operational for groundnuts and another 25 for soybeans. To facilitate operations, farmers can submit applications online and payments will be made directly into their account, Government officials informed. The support prices for soybeans and unshelled groundnuts will be, respectively, INR 30 500 and INR 44 500 per tonne (respectively, USD 466 and 680).
116	MARKET POLICIES – <i>Public procurement & stockholding</i>	Indonesia	May	Soybean	Indonesia's State Logistics Agency (BULOG) allocated IDR 37 trillion (USD 2.8 billion) for the procurement of rice, soybeans and sugar. BULOG's purchases, which can either be made on the domestic market or abroad, will be aimed at stabilizing domestic consumer prices. Furthermore, BULOG is seeking to improve cooperation with private stakeholders that agree to sell the commodities at the prices set by the agency. Moreover, BULOG plans to continue investing in post-harvest infrastructure, notably storage facilities, in order to strengthen the agency's capacity to buy from local farmers.
117	MARKET POLICIES – <i>Public procurement & stockholding</i>	Sri Lanka	September	Coconut	To check recent surges in domestic prices, coconut stocks owned by Sri Lanka's State Plantation Corporation will be released into the market at a price of LKR 60 per nut (USD 0.39), the country's Coconut Cultivation Board informed. Reportedly, also freshly procured coconuts will be distributed. According to a market survey, in September, the price for a single coconut climbed to LKR 100 (USD 0.65).
118	TRADE POLICIES – <i>Import measures - non-tariff</i>	China, Argentina	August	Soybean oil	As part of comprehensive talks on balancing trade between the two countries, China agreed to resume imports of soybean oil from Argentina. China's state-owned grain corporation Sinograin confirmed it was ready to purchase soybean oil from the world's top supplier. China started restricting imports from Argentina on phytosanitary grounds in 2010, when annual purchases dropped from 2 million tonnes to less than 500 000 tonnes.

No.	Domain	Country	Month	Product	Description *
119	TRADE POLICIES – <i>Import measures - non-tariff</i>	China	September	Vegetable oils	China's Food Standards Agency granted a two-year transitional period – until 30 September 2019 – for the implementation of food import regulations that were announced back in April 2016 (see <i>MPPU June '16</i>). The new regulations require importers of certain products – including bulk vegetable oil – to review relevant health certificates and conduct on-site inspections of foreign establishments from which products are sourced. The transitional period has been accorded to allow importers/exporters sufficient time to comply with the new requirement.
120	TRADE POLICIES – <i>Import measures - non-tariff</i>	China	December	Soybean	Concerned about the presence of weed seeds in past consignments of soybeans from the United States, Chinese authorities decided to lower – as of 1 January 2018 – the level of impurities allowed in U.S. soybean cargoes to 1 percent. In the United States, quality specifications for No. 2 yellow soybeans – the variety dominating U.S. shipments – allow for up to 2 percent of foreign material. China's inspection and quarantine services informed they would not guarantee speedy handling of cargoes containing more than 1 percent of foreign matter, adding that consignments with higher impurity levels could be subject to additional inspections, cleaning and related measures intended to mitigate pest risk. In recent years, US farmers have been confronted with new herbicide-resistant weeds, traces of which may indeed appear in harvested beans. According to industry sources, about half of US soybeans shipped to China last year would not meet China's more stringent standard. Experts estimated that reducing the content of foreign matter to 1 percent could raise the costs of shipping soybeans to China by 15 US cents per bushel (USD 4 per tonne). To prevent disruptions in export flows, USDA's Federal Grain Inspection Service intends to examine all soybean dispatches destined to China, holding back consignments that fail to meet the stricter standard. Furthermore, USDA will commission work on production and harvesting methods that allow reducing weed seed contamination in soybean deliveries.
121	TRADE POLICIES – <i>Import measures - non-tariff</i>	European Union, Nigeria	June	Groundnut, palm oil, sesame	According to Nigeria's Food and Drug Agency, last year, the EU rejected 24 food products originating from Nigeria for failing to meet the bloc's trade standards. Reportedly, groundnut, palm oil and sesame seeds figured prominently among the rejected commodities, with aflatoxin contamination (groundnut) and the presence of toxic colouring agents (palm oil) as key issues. Reportedly, the concerned shipments left the country illegally, without the required certification.
122	TRADE POLICIES – <i>Import measures - non-tariff</i>	Israel	November	Olive oil	The Government of Israel announced an increase in the amount of olive oil that can be imported into the country free of duties and other taxes. Over the next three years, the duty-free quota will be gradually raised from 5 000 to 7 000 tonnes per year. Currently, the country consumes about 20 000 tonnes annually, of which 15 000 tonnes are locally produced. Local production is expected to continue lagging behind domestic demand. The trade policy measure is aimed at driving down the price of olive oil to consumers and stimulate olive oil consumption. Out-of-quota imports will continue to attract tariffs of around 33 percent.
123	TRADE POLICIES – <i>Import measures - non-tariff</i>	Viet Nam, India	March	Groundnuts	In March 2017, citing phytosanitary concerns, the Government of Viet Nam temporarily banned the importation of groundnuts and other agricultural products from India. Subsequently, India suspended imports of a number of agricultural products from Viet Nam, also on phytosanitary grounds. Eventually, both countries lifted their temporary bans, reporting that the phytosanitary issues had been resolved.
124	TRADE POLICIES – <i>Import measures - non-tariff</i>	Zambia	March	Edible oils	Reportedly, in February 2017, government officials announced the restriction of imports of refined, packed and bottled edible oils into the country, adding that the measure was meant to protect domestic refiners and strengthen the market for locally produced cooking oils.

No.	Domain	Country	Month	Product	Description *
125	TRADE POLICIES – <i>Import measures - non-tariff</i>	Zimbabwe	September	Soybean	According to media reports, the Government of Zimbabwe has lifted a two-and-a-half month old ban on soybean imports, in an effort to ensure adequate supplies of cooking oil in the country.
126	TRADE POLICIES – <i>Import measures - tariffs & levies</i>	Ecuador	January	Soybean meal	Ecuador decided to extend its current tariff and duty exemptions for soybean meal imports from all origins until 31 December 2019. According to market experts, the exemption will keep imports from the United States – Ecuador's principal supplier – competitive compared to those from Bolivia (one of Ecuador's Andean Community partners) and other MERCOSUR countries. Without the exemption, soymeal imports would attract a 15 percent ad valorem tax plus the Andean Price Band's variable levy, currently set at 21 percent.
127	TRADE POLICIES – <i>Import measures - tariffs & levies</i>	India	March	Sunflower seed	The Government of India announced a temporary cut in the import duty on sunflower seed. From 1 April to 30 September 2017, the ordinary 30 percent duty has been replaced by a 10 percent tariff. The country's processing industry, which is suffering for a low capacity utilization rate, had been calling for a tariff cut from a long time. The measure is expected to raise India's sunflowerseed imports and crushing.
128	TRADE POLICIES – <i>Import measures - tariffs & levies</i>	India	August	Vegetable oils	In India, the world's top buyer of vegetable oils, import duties on selected crude and refined oils have been raised to protect local farmers from low-priced imports and thereby encourage domestic oilseed production. Reportedly, the concurrence of copious imports with a bumper domestic crop led to stock surges and sharp price falls. The import levies for crude palm oil, refined palm oil and crude soybean oil – have been raised to, respectively, 15 percent, 25 percent and 17.5 percent (up from, respectively, 7.5, 15 and 12.5 percent). By widening the import duty differential between crude and refined palm oil – from 7.5 percent to 10 percent – the Government also aims to assist domestic oil processors, who find it increasingly difficult to compete with imports of low-priced refined oils.
129	TRADE POLICIES – <i>Import measures - tariffs & levies</i>	India	November	Edible oils, soybean	In an effort to curb edible oil imports and lift domestic prices in support of local farmers and refiners, the Government raised import tariffs for vegetable oils and soybeans to the highest level in more than a decade. Considering that India is the world's top importer of vegetable oils, the tariff hike could affect world markets. The duty increases for crude and refined palm, soy, sunflower and rapeseed oil ranged between 60 and 100 percent. Indian producers had been calling for increased import restrictions for several months. With local crushers and refiners facing growing competition from low-priced imports, domestic oilseed prices had dropped below minimum support price levels – notwithstanding a first, modest increase in import duties earlier this year (see <i>MPPU Sep. '17</i>). The latest duty hike is expected to i) drive up domestic edible oil prices, thus stimulating local oilseed crushing, and ii) support local oilcrop prices, promoting farmer selling. With regard to trade, experts expect a relatively short-lived drop in vegetable oil imports, given India's steady demand expansion. On the other hand, the price competitiveness of Indian oilmeals could improve, encouraging export sales.
130	TRADE POLICIES – <i>Import measures - tariffs & levies</i>	Sri Lanka	March	Cooking oil	In Sri Lanka, forecasts of a marked drop in domestic coconut production have driven up the retail prices of coconut oil and other cooking oils. Concerned about the resulting hardship for consumers, the government approved the importation of 40 000 tonnes of coconut oil and decided to lower the special commodity levy charged on imported vegetables oils. For coconut oil, palm kernel oil and refined palm oil the duty has been reduced from LKR 150/kg to LKR 130/kg (respectively 99 and 85 US cents), while for crude coconut and palm oil the duty has been adjusted from LKR 130/kg to LKR 110/kg (85 and 72 US cents).

No.	Domain	Country	Month	Product	Description *
131	TRADE POLICIES – <i>Import measures - tariffs & levies</i>	Turkey	March	Sunflower oil/meal	According to industry sources, import licenses issued by the Turkish Government no longer include the Russian Federation in a list of accepted tax-free origins for agricultural products, including wheat, maize and sunflower oil and sunflower meal – a circumstance implying that a prohibitive tariff of 130 percent would be applied to supplies from Russia. While government officials underscored that no supplier had been banned from exporting to Turkey, Turkey's purchases of the concerned products from Russia have effectively come to a halt.
132	TRADE POLICIES – <i>Import measures - tariffs & levies</i>	Turkey	May	Sunflower oil/meal	Turkey readmitted the Russian Federation to its list of accepted import tax-free origins for agricultural products including sunflower oil and sunflower meal. The Russian Federation had been suspended from the list last March, entailing that its shipments to Turkey faced prohibitive tariffs (see <i>MPPU Apr.'17</i>).
133	TRADE POLICIES – <i>Export measures - tariff & non-tariff</i>	Argentina	November	Grains, oilseeds	Government officials announced a 30 percent cut in docking service fees in the port of Rosario – the port that accounts for about 80 percent of the country's agricultural exports. The measure is aimed at reducing the costs of exporting grains. Reported, docking fees represent about 30 percent of total port expenses incurred by exporters.
134	TRADE POLICIES – <i>Export measures - tariff & non-tariff</i>	Bolivia	May	Soybean	The Bolivian Government raised the country's annual soybean export quota to 400 000 tonnes, in a bid to promote foreign sales while continuing to guarantee that domestic consumption requirements are met.
135	TRADE POLICIES – <i>Export measures - tariff & non-tariff</i>	India	March	Edible oil	With a view to boost shipments and promote domestic processing of premium vegetable oils, on 27 March, the Government of India lifted a ban on bulk exports of selected edible oils, notably groundnut, sesame and soybean oil. The measures will likely benefit in particular groundnut producers and crushers in Gujarat State, where a record harvest has driven down local prices. India banned bulk exports in 2008, when the share of the country's consumption met through imports started rising sharply. Since then, the government only allowed the exportation of edible oils in branded consumer packs of up to 5 kg – subject to volume limitations and minimum prices.
136	TRADE POLICIES – <i>Export measures - tariff & non-tariff</i>	Indonesia	February	Palm oil	In February, Indonesia will raise its export tax on crude palm oil shipments to USD 18 per tonne (compared to USD 3 in January) – the highest rate since the country changed the duty from a percentage rate to a dollar system in 2015 (see <i>MPPU Aug.'15</i>). The six-fold increase has been triggered by the hike in the government's benchmark price for palm oil to USD 816 per tonne. The tax rise could affect the competitiveness of Indonesia's exports and encourage producers to raise sales to domestic buyers, especially the biodiesel industry, industry sources said.
137	TRADE POLICIES – <i>Export measures - tariff & non-tariff</i>	Indonesia	March	Palm oil	In March 2017, Indonesia's variable tax on palm oil exports remained unchanged at USD 18 per tonne, reflecting an only marginal increase in the government's palm oil reference price between March and February 2017. For April, the export tax has been lowered to USD 3 per tonne, reflecting a drop in the base price.
138	TRADE POLICIES – <i>Export measures - tariff & non-tariff</i>	Indonesia	May	Palm oil	After standing at USD 18 per tonne in February and March, Indonesia's export tax on crude palm oil shipments was lowered to USD 3 per tonne in April and eventually suspended in May. The successive cuts were in line with the tax' sliding regime and reflect the decline in the commodity's world price (and hence in the official benchmark price used to determine the tax rate).

No.	Domain	Country	Month	Product	Description *
139	TRADE POLICIES – <i>Export measures - tariff & non-tariff</i>	Indonesia	June	Palm oil	In Indonesia, the export tax on crude palm oil has been set at zero for both June and July, as the commodity's reference price remained below the threshold that would trigger taxation.
140	TRADE POLICIES – <i>Export measures - tariff & non-tariff</i>	Indonesia	July	Palm oil	Indonesia kept the export tax on crude palm oil at zero in August, as the commodity's reference price remained below the threshold that triggers taxation.
141	TRADE POLICIES – <i>Export measures - tariff & non-tariff</i>	Indonesia	August	Palm oil	In September 2017, Indonesia's sliding export tax on crude palm oil will stay at zero (for the fifth consecutive month), as the commodity's reference price remained below the threshold that triggers taxation.
142	TRADE POLICIES – <i>Export measures - tariff & non-tariff</i>	Indonesia	September	Palm oil	In October 2017, Indonesia's sliding export tax on crude palm oil will stay at zero (for the sixth consecutive month), as the commodity's reference price remained below the threshold that triggers taxation.
143	TRADE POLICIES – <i>Export measures - tariff & non-tariff</i>	Indonesia	November	Palm oil	In November and December 2017, Indonesia's sliding export tax on crude palm oil stayed at zero. For eight months in succession, Indonesia's reference price remained below the threshold that triggers taxation.
144	TRADE POLICIES – <i>Export measures - tariff & non-tariff</i>	Malaysia	February	Palm oil	Malaysia raised its palm oil export duty for February to 7.5 percent – the fourth consecutive increase since August 2016, also reflecting an increase in the relevant reference price (see <i>MPPU Jan. '17</i>).
145	TRADE POLICIES – <i>Export measures - tariff & non-tariff</i>	Malaysia	March	Palm oil	Malaysia's sliding export tax for palm oil has been raised from 7.5 percent to 8 percent in March (mirroring an increase in the government's benchmark price), whereas, in April, the tax has been brought back to 7.5 percent (following a drop in the reference price).
146	TRADE POLICIES – <i>Export measures - tariff & non-tariff</i>	Malaysia	March	Palm oil	According to government officials, Malaysia is considering aligning the country's variable export duty for palm oil with that of Indonesia. Allegedly, differences in the duty schemes of the two countries resulted in Malaysia losing global market share, particularly regarding trade in refined palm oil. Reportedly, under the present duty structure, Indonesia is able to sell refined palm oil at USD 30–40 per tonne less than Malaysia. Therefore, Malaysia would like to explore the possibility of having a common, mutually beneficial tax regime. The issue could be reviewed at a future meeting of the Council of Palm Oil Producing Countries (CPOPC).
147	TRADE POLICIES – <i>Export measures - tariff & non-tariff</i>	Malaysia	May	Palm oil	After standing at 8 percent in February and March, Malaysia's export tax on crude palm oil shipments has been lowered three times, mirroring the gradual decline in the commodity's world price (and hence in the official benchmark price used to determine the sliding tax rate). In April, May and June 2017, the export tax stood at, respectively, 7.5 percent, 7 percent and 6 percent.
148	TRADE POLICIES – <i>Export measures - tariff & non-tariff</i>	Malaysia	June	Palm oil	In Malaysia, the variable tax for July has been raised to 6.5 percent (compared to 6 percent in June), mirroring a small increase in the relevant benchmark price for crude palm oil.
149	TRADE POLICIES – <i>Export measures - tariff & non-tariff</i>	Malaysia	July	Palm oil	In Malaysia, the variable tax for August has been lowered to 5.5 percent (compared with 6.5 percent in July), mirroring a drop in the relevant benchmark price for crude palm oil.

No.	Domain	Country	Month	Product	Description *
150	TRADE POLICIES – <i>Export measures - tariff & non-tariff</i>	Malaysia	August	Palm oil	In Malaysia, the variable tax for September remains unchanged at 5.5 percent, as the relevant benchmark price remained virtually unchanged compared with the previous month's level.
151	TRADE POLICIES – <i>Export measures - tariff & non-tariff</i>	Malaysia	September	Palm oil	In Malaysia, the variable tax for October will be raised to 6 percent (up from 5.5 percent in the previous month), reflecting an increase in the relevant benchmark price.
152	TRADE POLICIES – <i>Export measures - tariff & non-tariff</i>	Malaysia	November	Palm oil	In Malaysia, the variable export tax for November was raised to 6.5 percent (up from 6 percent in October) and then brought back to 6 percent in December, mirroring corresponding movements in the relevant benchmark price.
153	TRADE POLICIES – <i>Export measures - tariff & non-tariff</i>	Malaysia	December	Palm oil	Malaysia's sliding export duty for January 2018 has been set at 5.5 percent, down from 6 percent in December. The downward correction reflects a decrease in the relevant market reference price.
154	TRADE POLICIES – <i>Export measures - tariff & non-tariff</i>	Paraguay	June	Soybean	Paraguay's Lower and Upper House approved a bill introducing a 10 percent tax on soybean exports. Government officials said that Paraguay's President would likely veto the measure (as done with a similar proposal back in 2013 – (see <i>MPPU Nov. '13</i>), citing concerns that the proposed tax would hurt small and medium-sized farms. As a substitute, to increase state revenue, the Government proposed to raise the value-added tax on agricultural products. Reportedly, farmers have put their 2017/18 planting decisions on hold as, in case the export tax was approved, soybean plantings could be downsized.
155	TRADE POLICIES – <i>Export measures - tariff & non-tariff</i>	Ukraine	December	Soybean	On 7 December 2017, the Ukrainian Parliament voted to lift the existing value added tax refund on exports of soy, sunflower and rapeseed with effect from 1 March 2018. Subsequently, the Parliament agreed to soften the measure: based on the latest amendments, the tax refund for sunflowerseed exports will remain in place, while the refunds for rapeseed and soybean shipments will only be suspended for a limited period, namely from 1 September 2018 to end 2021 for soybeans and from 1 January 2020 to end 2021 for rapeseed. The bulk of Ukraine's rape and soy production is exported in the form of seeds, as opposed to sunflower, which is crushed locally and subsequently exported as oil and meal. The temporary suspension of refunds for rape and soy could weigh on the crops' domestic prices, possibly leading to a drop in plantings, while Ukraine's crushers could benefit from higher seed supplies.
156	TRADE POLICIES – <i>Trade disputes</i>	China, United States	January	Distillers dried grains	The Chinese Government raised the anti-dumping and anti-subsidy duties imposed on the importation of distillers dried grains (DDGs) from the United States back in September 2016 and extended the retaliatory measure until 2022 – a decision expected to increase feedmillers' demand for domestically produced DDGs, maize and soymeal.
157	TRADE POLICIES – <i>Trade disputes</i>	European Union, Indonesia	January	Palm oil fatty alcohols	In December 2016, a panel established by the WTO dispute settlement body (DSB) issued a report on the anti-dumping measures taken by the European Union against imports of certain fatty alcohols (derived from palm oil) from Indonesia (see also <i>MPPU May'14</i>). The Panel, which was set up at the request of Indonesia, found that the EU's export price comparisons were not inconsistent with existing WTO regulations, but ruled that the EU failed to disclose the results of its on-the-spot verifications of Indonesian producers. The panel recommended that the EU bring its measures into conformity with its obligations under the WTO anti-dumping Agreement.

No.	Domain	Country	Month	Product	Description *
158	TRADE POLICIES – <i>Trade disputes</i>	European Union, Argentina, Indonesia	July	Biodiesel	In line with pledges to bring the EU's anti-dumping duties on biodiesel imports from Argentina and Indonesia into conformity with WTO rules (see <i>MPPU Jan '17</i>), the EU Commission has tabled a proposal for lowering the duties that are in place since November 2013. Under the proposal, the duties on imports from Argentina would be reduced from around 25 percent to 9 percent, and those on Indonesian produce from about 19 percent to 5 percent, according to media reports. The EU's agriculture and biodiesel lobbies strongly criticized the proposal, arguing that their sectors would be severely impacted by the reduction in duties, which, allegedly, would trigger an influx of low-cost biodiesel from Argentina and Indonesia into the bloc. The Commission decided to postpone the final vote on the matter to September 2017.
159	TRADE POLICIES – <i>Trade disputes</i>	European Union, Argentina	August	Biodiesel	Regarding the EU's commitment to bring the bloc's anti-dumping duties on biodiesel imports from Argentina into conformity with a recent WTO ruling (see <i>MPPU Jan.&Aug. '17</i>), the two parties agreed to extend the EU's time limit for removing or altering the named tariffs until 28 September 2017 (as opposed to the originally agreed upon date of 10 August 2017).
160	TRADE POLICIES – <i>Trade disputes</i>	European Union, Argentina	September	Biodiesel	Following consultations with Member States, the European Commission decided to reduce the bloc's custom duties on biodiesel imports from Argentina, effective 19 September 2017 (see also <i>MPPU Sep. '17</i>). To conform with a recent WTO ruling, the EU lowered its anti-dumping duties to between 4.5 percent and 8.1 percent – as against the 22–25.7 percent range in place since May 2013. The EU's decision has come at a time when the United States chose to implement its own measures to restrict biodiesel imports from Argentina (see <i>MPPU Sep. '17</i>). Accordingly, Argentina's export-oriented biodiesel industry welcomed the possibility to resume shipments to the EU market. By contrast, farmer organizations and biodiesel producers in the EU (where biodiesel is mostly produced from locally grown rapeseed crops) criticized the reduction in tariffs and threatened to appeal against the European Commission's decision. Meanwhile, the EU's anti-dumping tariffs on Indonesian biodiesel, which were also introduced in 2013, will remain in place, considering that they are subject of a still pending, separate case at the WTO (see <i>MPPU Nov. '16</i>).
161	TRADE POLICIES – <i>Trade disputes</i>	United States, Argentina, Indonesia	March	Biodiesel	Claiming that Argentina and Indonesia are dumping biodiesel onto the US market, the US biodiesel industry filed an anti-dumping and countervailing duty petition with the United States Government. According to the petition, Argentine and Indonesian producers are selling biodiesel into the US market at prices substantially below their costs of production. The petition also alleges that Argentine and Indonesian producers enjoy trade and market distorting subsidies. US biodiesel imports from the two countries are said to have surged in recent years, taking market share from US manufacturers. Reportedly, the Indonesian Government has submitted a complaint to the WTO over the US industry's petition, while Argentine state officials have rejected the US claims as unfounded.
162	TRADE POLICIES – <i>Trade disputes</i>	United States, Argentina, Indonesia	May	Biodiesel	In April, following a petition filed by the US biodiesel industry (see <i>MPPU Apr. '17</i>), the US Department of Commerce launched preliminary investigations into biodiesel imports from Argentina and Indonesia for possible dumping and subsidization. In May, the US International Trade Commission (ITC) determined that there is evidence that the US biodiesel industry is hurt by such imports, which, allegedly, are subsidized and sold in the United States at less than fair value. Based on the Commission's affirmative determination, the Department of Commerce is set to pursue its investigations, with <i>preliminary</i> countervailing and anti-dumping duty determinations due later this year. In 2016, roughly a third of the US biodiesel market (i.e. about 3.1 million tonnes) was supplied by imported biodiesel. Argentina alone exported around 1.5 million tonnes of biodiesel and renewable diesel to the United States.

No.	Domain	Country	Month	Product	Description *
163	TRADE POLICIES – <i>Trade disputes</i>	United States, Argentina, Indonesia	June	Biodiesel	The U.S. Department of Commerce decided to extend its trade investigations into biodiesel imports from Argentina and Indonesia (see <i>MPPU June '17</i>), which implies that any determination of preliminary countervailing duties and anti-dumping duties will be due by, respectively, 22nd August and 20th October (as opposed to the previous deadlines of 16th June and 30th August).
164	TRADE POLICIES – <i>Trade disputes</i>	United States, Argentina	July	Biodiesel	The US biodiesel industry filed an additional allegation with the US Department of Commerce (DOC) claiming that 'critical circumstances' exist with respect to imports of low-cost biodiesel from Argentina. Based on an earlier petition, in April 2017, DOC launched preliminary investigations into the named imports for possible dumping and subsidization, with preliminary determinations due later this year (see <i>MPPU June '17</i>). In principle, the 'critical circumstances' provision allows for the imposition of countervailing measures prior to preliminary determinations, possibly offering relief to affected parties in the form of retroactive duties – a protection aimed at deterring exporters from boosting shipments before countervailing measures are introduced. Claiming that shipments of Argentine biodiesel into the United States surged since the industry filed its first petition, US biodiesel producers have taken the additional step of invoking the 'critical circumstances' clause.
165	TRADE POLICIES – <i>Trade disputes</i>	United States, Argentina, Indonesia	August	Biodiesel	The U.S. Department of Commerce (DOC) announced affirmative preliminary determinations in the countervailing duty investigations related to Indonesian and Argentine exports of biodiesel to the United States. DOC claimed that Argentine and Indonesian exporters received subsidies of, respectively, 50–64 percent and 41–68 percent. The department also determined that 'critical circumstances' exist in both cases, which allows for retroactive collection of duties (see also <i>MPPU Aug. '17</i>). Final duty determinations are due on 7 November 2017. While DOC finalizes its investigations, biodiesel importers will be required to pay cash deposits on purchases from Argentina and Indonesia based on the indicated subsidization rates, going back to May 2017. As to the companion anti-dumping investigations, preliminary determinations are expected in October 2017. DOC's initial notice has led to temporary spikes in US and international soybean oil prices. Evidently, market participants are concerned that, in the United States, demand for domestically produced biodiesel – which is mainly produced from soybean oil – could increase once retaliatory import duties are imposed. Argentina would be particularly affected by the envisaged trade policy change: in 2016, US-bound exports accounted for approximately 90 percent of Argentina's overall biodiesel sales, with imports from Argentina representing two-thirds of the United States' total biodiesel purchases. Reportedly, Argentina has offered to collaborate with the U.S. DOC during its final duty determination. The two parties may also consider the introduction of tariff rate quotas, according to press reports.
166	TRADE POLICIES – <i>Trade disputes</i>	United States, Argentina, Indonesia	October	Biodiesel	In October 2017, the U.S. Commerce Department set – in addition to the preliminary countervailing duties imposed earlier this year (see <i>MPPU Sep. '17</i>) – preliminary anti-dumping duties on imports of biodiesel from Argentina and Indonesia, claiming that Argentine and Indonesian biodiesel was sold in the United States at dumping margins of, respectively, 54–70 percent and 51 percent. The Department is expected to announce its <i>final</i> anti-dumping decision in January 2018.

No.	Domain	Country	Month	Product	Description *
167	TRADE POLICIES – <i>Trade disputes</i>	United States, Argentina, Indonesia	November	Biodiesel	In November 2017, the Department also set <i>final</i> countervailing (or anti-subsidy) duties, which will remain in place for five years. The <i>final</i> duties, which vary depending on the particular producer/exporter involved, have been fixed at 71–72 percent for Argentine biodiesel and 34–65 percent for Indonesian produce – partly exceeding the preliminary duties introduced in August 2017. At any rate, biodiesel imports from the two countries came to a standstill as soon as the high preliminary countervailing duties came into effect. For the <i>final</i> countervailing duties to come into effect, the U.S. International Trade Commission needs to confirm that the imports in question harmed U.S. producers – a decision expected to be made in December 2017.
168	TRADE POLICIES – <i>Trade disputes</i>	United States, Argentina, Indonesia	December	Biodiesel	The U.S. International Trade Commission found that biodiesel from Argentina and Indonesia hurt US producers and that biodiesel production in the two countries is subsidized. The affirmation allows the countervailing duties set by the U.S. Commerce Department last November to come into force and remain in place for five years (see <i>MPPU Dec. '17</i>).
169	TRADE POLICIES – <i>Comprehensive trade agreements</i>	Australia, European Union	May	Oilseeds, rapeseed	Australia and the European Union successfully concluded a joint scoping exercise on a future free trade agreement between the two economies. Australian growers' associations welcomed the news as the EU provides an important market for Australian oilseeds, notably rapeseed. Currently, about 60 percent of Australia's rapeseed shipments are directed to the EU. It is important to note that, in the EU, Australia's rapeseeds enjoy a premium of up to AUD 50 per tonne (USD 38) due to the country's capacity to deliver non-GM rapeseed.
170	TRADE POLICIES – <i>Comprehensive trade agreements</i>	Australia, Peru	November	Rapeseed	Under a recently signed free trade agreement between Australia and Peru, Australian rapeseed will be allowed to enter Peru free of duty.
171	TRADE POLICIES – <i>Comprehensive trade agreements</i>	Canada, China	March	Rapeseed	The Canola Council of Canada (the industry association that represents the country's rapeseed value chain) has backed the on-going exploratory discussions between Canada and China about a possible bilateral trade agreement, saying that it would create jobs and increase Canada's exports of rapeseed and rapeseed products. According to a study commissioned by the Council, the elimination of China's import tariffs could raise Canada's exports of rape seed, oil and meal by CAD 1.2 billion a year (USD 0.9 billion) – which would equate to 1.8 million tonnes of rapeseed or about 10 percent of Canada's current annual production. Reportedly, China's tariff on imported rapeseed currently stands at 9 percent, which, in 2016, made imported rapeseed about CAD 32 per tonne (USD 24) more expensive than soybeans (which enjoy an import duty of 3 percent). In addition, resolving specific non-tariff barriers is said to be necessary to take full advantage of China's demand (see <i>MPPU Nov. '16</i>). Furthermore, three rapeseed varieties authorized in Canada in 2012 are still to gain approval in China, implying that their commercialization remains on hold in Canada – allegedly hampering farmers' access to the latest seed technology.
172	TRADE POLICIES – <i>Comprehensive trade agreements</i>	Canada, European Union	September	Rapeseed oil	The Comprehensive Economic and Trade Agreement (CETA) between the EU and Canada has entered into force provisionally on 21 September 2017. Concerning oilseeds, the agreement's implementation entails the elimination – from day one – of the EU's tariffs on Canadian rapeseed oil imports (see <i>MPPU Dec. '16</i>). CETA's full and definitive application remains contingent upon ratification by all EU Member State parliaments.
173	TRADE POLICIES – <i>Comprehensive trade agreements</i>	Indonesia, Australia	March	Palm oil	While Indonesia and Australia are negotiating a free trade deal to be concluded this year, Indonesian officials invited Australia to remove tariffs and non-tariff measures for Indonesian products such as palm oil, paper pulp and other wood products. Regarding palm oil, Australian officials informed that no trade barriers were in place.

No.	Domain	Country	Month	Product	Description *
174	TRADE POLICIES – <i>Comprehensive trade agreements</i>	Malaysia, Sri Lanka	December	Palm oil	Reportedly, the two countries are exploring the possibility of entering into a free trade agreement. In the event that an agreement is reached, Malaysia expects several products to gain better access to the Sri Lankan market, including palm oil, on which Sri Lanka currently charges a special levy of LKR 110–130 per kg (USD 715–844 per tonne).
175	TRADE POLICIES – <i>Comprehensive trade agreements</i>	Global	January	Olive oil	On January 1, the International Olive Council's (IOC) new international agreement on olive oil and table olives took effect. It is the sixth such agreement since the organization was set up in 1959. Compared to the previous versions, the new agreement aims to boost the involvement of importing countries in IOC's work by making participation shares more appealing. Bringing together olive oil and table olive producing and consuming stakeholders, IOC's mission is to contribute to the sustainable and responsible development of olive growing and to serve as a world forum for discussing policy issues and tackling the industry's challenges.
176	TRADE POLICIES – <i>Comprehensive trade agreements</i>	Global	March	Agricultural crops	WTO announced the entry into force of the Trade Facilitation Agreement. The multilateral agreement is aimed at expediting the movement, release and clearance of goods by simplifying import and export procedures, customs formalities and transit requirements. Full implementation of the agreement is expected to trim trade costs and help diversify trade, with developing countries having the most gain. The agreement includes a special facility meant to ensure that developing countries receive the assistance needed to reap the full benefits of the trade pact. By end-February, 114 countries notified acceptance of the agreement.
177	TRADE POLICIES – <i>Product-specific bilateral initiatives</i>	Canada, Viet Nam, India	March	Oilseeds	The Government of Canada reiterated its commitment to strengthen its agricultural ties and deepen mutually beneficial trade with both Viet Nam and India. During a trade mission to the two countries, government and industry officials promoted Canada's agri-food products, including oilseeds. Furthermore, in India, several Memoranda of Understanding have been signed between Canadian rapeseed oil distributors and Indian retailers.
178	TRADE POLICIES – <i>Product-specific bilateral initiatives</i>	China, Ukraine	September	Sunflowerseed cake	The standard setting bodies of China and Ukraine agreed on a sanitary and biosafety protocol that will govern future exports of Ukrainian sunflowerseed cake to China.
179	TRADE POLICIES – <i>Product-specific bilateral initiatives</i>	India, Ghana	March	Oilseeds, vegetable oils	Indian governmental officials reaffirmed their country's commitment to deepen trade relations with Ghana, mentioning, inter alia, India's growing demand for oilseeds and vegetable oil from Ghana.
180	TRADE POLICIES – <i>Product-specific bilateral initiatives</i>	Indonesia, China	June	Biodiesel	According to media sources, representatives from the two countries discussed about the possibility of Indonesia supporting China in its goal to raise domestic biodiesel consumption. Reportedly, Indonesia is ready to cooperate with China, whether by supplying finished biodiesel, crude palm oil (as feedstock for biodiesel production), or the technology required to produce biodiesel. At the same time, Indonesia also invited China to invest in Indonesia's downstream palm oil processing sector. Based on China's 13th Five-Year-Plan, domestic biodiesel consumption would climb to 2 million tonnes by 2020 – from today's level of less than 0.5 million tonnes. In the case of Indonesia, on the other hand, the biodiesel market is more mature and the industry is faced with excess production capacity – hence the search for new export markets.
181	TRADE POLICIES – <i>Product-specific bilateral initiatives</i>	Indonesia, Viet Nam	July	Palm oil	Recent efforts to promote business between Indonesia and Viet Nam are expected to result in increased supplies of Indonesian paper and palm oil to the Vietnamese market, according to local media reporting on recent bilateral talks.

No.	Domain	Country	Month	Product	Description *
182	TRADE POLICIES – <i>Product-specific bilateral initiatives</i>	Indonesia, Nigeria	July	Palm oil	According to official sources, Indonesian Government representatives initiated talks with Nigerian counterparts to revive shipments of Indonesian crude palm oil (CPO) to Nigeria. Reportedly, CPO trade between the two countries has fallen sharply over the last few years, as Nigeria introduced import restrictions to protect its foreign exchange market and stimulate domestic oil palm cultivation.
183	TRADE POLICIES – <i>Product-specific bilateral initiatives</i>	Indonesia, Malaysia	August	Palm oil	Under the framework of CPOPC, the Council of Palm Oil Producing Countries set up by Malaysia and Indonesia to foster collaboration on palm oil, the two founding countries have agreed to (i) jointly explore the possibility of supplying China, India and other countries with palm oil for their nascent biodiesel industries, and (ii) conduct joint campaigns in key import markets to publicize palm oil's environmental credentials. Moreover, the CPOPC Secretariat was tasked to invite other palm oil producing countries to join the Council.
184	TRADE POLICIES – <i>Product-specific bilateral initiatives</i>	Indonesia, Russian Federation	August	Palm oil, copra	Government officials informed that a preliminary deal to barter military jets for commodities – including palm oil and copra – has been signed between an Indonesian and a Russian state trading company. Details about the quantities of produce to be shipped by Indonesia were not made available.
185	TRADE POLICIES – <i>Product-specific bilateral initiatives</i>	Indonesia, Uzbekistan	September	Coconut, soybean, palm oil	Indonesia and Uzbekistan agreed to enhance bilateral cooperation in agriculture and fisheries. With regard to oilcrops, Indonesia views Uzbekistan as a potential export market for palm oil and coconut, while Uzbekistan is interested in Indonesia's experience in soybean cultivation.
186	TRADE POLICIES – <i>Product-specific bilateral initiatives</i>	Kazakhstan, China	March	Soybeans	Government officials from Kazakhstan and China signed a protocol on phytosanitary requirements for increasing the exportation of Kazakh soybeans to China (see also <i>MPPU Jan.&Feb. '17</i>). Reportedly, all soybean imports from Kazakhstan will be crushed in China.
187	TRADE POLICIES – <i>Product-specific bilateral initiatives</i>	Kenya, Zambia, Eastern/Southern Africa	March	Palm oil	During bilateral talks between the two countries, Kenyan government officials stated that Kenyan milk and palm oil products could not access the Zambian market due to diverging standards. They called for the development of common COMESA standards to enable trade between members of COMESA (Common Market for Eastern and Southern Africa).
188	TRADE POLICIES – <i>Product-specific bilateral initiatives</i>	Malaysia, India	May	Palm oil	The Governments of Malaysia and India signed a Memorandum of Understanding aimed at helping raise the presence of Malaysian palm oil in the Indian market. The MoU provides a platform for Malaysian palm oil related agencies to explore – together with Indian research institutions and other organizations – new traits and applications of palm oil, specifically tailored to India's fast growing market. The use of MSPO-certified palm oil (Malaysian Sustainable Palm Oil) will also be promoted under the accord.
189	TRADE POLICIES – <i>Product-specific bilateral initiatives</i>	Malaysia, Philippines	July	Palm oil, biodiesel	Malaysia is targeting a 50 percent increase in its shipments of palm oil and palm oil-based products (including biodiesel) to the Philippines over the coming three years, government sources reported. According to bilateral talks, there is room for Philippine's edible oil imports to increase, considering that the country is not self-sufficient in edible vegetable oil and that demand is steadily rising. Consultations also focused on possibilities of collaboration in the area of renewable energy, including biodiesel. In the Philippines, the planned increase in mandatory biodiesel blending (from 2 percent to 5 percent) has been postponed several times due to insufficient domestic supplies of coconut oil, the country's main biodiesel feedstock. By contrast, Malaysia reportedly has ample capacity to export either palm oil-based biodiesel or crude palm oil to be used as biodiesel feedstock.

No.	Domain	Country	Month	Product	Description *
190	TRADE POLICIES – <i>Product-specific bilateral initiatives</i>	Malaysia, Ghana	November	Oil palm	Malaysia's palm oil industry is set to partner with companies in Ghana's palm oil sector to strengthen the latter's production and processing capacities. The exchange of technical and marketing expertise is expected to bolster Ghanaian production for both domestic consumption and exportation within West Africa.
191	TRADE POLICIES – <i>Product-specific bilateral initiatives</i>	Malaysia, Viet Nam	November	Oil palm	Government officials from Malaysia and Viet Nam agreed to explore opportunities to increase strategic collaboration in the development of their respective plantation industries, particularly concerning oil palm, rubber and pepper.
192	TRADE POLICIES – <i>Product-specific bilateral initiatives</i>	Nigeria, Indonesia	June	Palm oil	In line with on-going efforts to promote economic cooperation and bilateral trade between Nigeria and Indonesia, government representative from both sides agreed to collaborate in the development of Nigeria's palm oil industry. Nigeria was also invited to join the Council of Palm Oil Producing Countries (CPOPC). The Council was established recently by Indonesia and Malaysia, in a bid to promote price stabilization and sustainable palm oil production.
193	TRADE POLICIES – <i>Product-specific bilateral initiatives</i>	Philippines, Malaysia	September	Oil palm	Government officials of the two countries discussed the possibility of setting up joint ventures for oil palm plantations in the Philippines to cater to the country's rising demand for vegetable oil for both food and industrial uses. Reportedly, in the long term, the joint development of up to 80 000 hectares of oil palm plantations would be considered.
194	TRADE POLICIES – <i>Product-specific bilateral initiatives</i>	Russian Federation, China	March	Soybean, flaxseed, sunflower oil	Based on the terms of a long-term contract between the Russian Federation and China, shipments of Russian agricultural products to China are set to increase, local news agencies informed. Reportedly, in 2018, the Russian Federation is planning to export 1.5 million tonnes of agricultural products – including soybeans, barley, flax seed and sunflower oil – to China.
195	TRADE POLICIES – <i>Product-specific bilateral initiatives</i>	Ukraine, Iran (Islamic Republic of)	March	Oilseeds, vegetable oils	According to Ukrainian government officials, Ukraine plans to significantly increase its trade in food and agricultural products with Iran. Reportedly, the two sides agreed that the trade potential between the countries is not fully tapped. Products for which Ukraine intends to expand its shipments to Iran include oilseeds and vegetable oils.
196	TRADE POLICIES – <i>Product-specific bilateral initiatives</i>	Ukraine, China	November	Sunflower meal	Last September, Ukraine and China signed a protocol on storage, packaging, labeling, quarantine and sanitary/phytosanitary requirements for importing Ukrainian sunflower meal into China. Adding China to its list of buyers is expected to raise Ukraine's exports to Asia, both through direct sales to China and likely re-exports to other countries in the region.
197	FOOD STANDARDS & FOOD SAFETY POLICIES	Canada	May	Hydrogenated oils	Canada's Health Ministry confirmed its plan to prohibit the use of partially hydrogenated oils (PHOs) – a key source of harmful trans fats in food products – by summer 2018 (see <i>MPPU Dec.'16</i>). Canada's initiative aligns with global efforts toward the elimination of PHOs in foods. According to the ministry, maintaining the current voluntary approach (see <i>MPPU Sep.'11 & July'16</i>) would be insufficient to achieve the objective of reducing the population's trans fat intake to the lowest level possible. The ministry also intends to provide stakeholders with information on more healthful alternatives to PHOs, preferably unsaturated fats. As a disincentive for the industry to replace PHOs with saturated fats, the ministry proposed to include front-of-pack warnings on products that are high in saturated fats.

No.	Domain	Country	Month	Product	Description *
198	FOOD STANDARDS & FOOD SAFETY POLICIES	Canada	September	Trans fatty acid	Following up on a proposal issued last year (see <i>MPPU Dec. '16</i>), the Government of Canada is now set to permanently ban partially hydrogenated oils – the main source of industrially produced trans fatty acids (or trans fats). The ban will apply to all foods sold in the country, including imported products and foods prepared and served in restaurants. By reducing trans fats in the food supply chain to the lowest level possible, the Government intends to reduce Canadians' risk of heart diseases. In order to allow the food industry sufficient time to find suitable alternatives, the ban will only come into force in September 2018. Hydrogenated vegetable oils are widely used in the production of pastries, baked goods and packaged goods to extend shelf life. Canada's ban is consistent with global efforts to eliminate artificial trans fats in foods, including those taken in the United States (see <i>MPPU July '15</i>).
199	FOOD STANDARDS & FOOD SAFETY POLICIES	China	May	Edible meals	China's National Health and Family Planning Commission confirmed that a new safety standard for food processing meals will come into force on 23 June 2017 (see also <i>MPPU Nov. '15</i>). As the standard only applies to edible meals for food processing, it does not concern rapeseed and cottonseed meal.
200	FOOD STANDARDS & FOOD SAFETY POLICIES	China	December	Soybean	China's food standards authorities released a new code of hygienic practice for the processing of grains, including soybeans. The new standard concerns storage and transport of unprocessed grains and comprises detailed hygienic requirements and provisions for safety control procedures.
201	FOOD STANDARDS & FOOD SAFETY POLICIES	European Union	March	Olive oil	Following the adoption by the European Parliament on 15 March 2017, new, more stringent regulations on food safety and inspection are set to come into force in April, requiring EU member states to apply the new rules by 2020. The main objective of the new regulations is to tackle fraudulent practices in the food industry across the EU. Sectors expected to benefit from the new rules include the olive oil sector, where several cases of fraud have been uncovered in recent years. Typically, low-quality olive pomace oils were sold and exported as extra virgin olive oil, and olives sourced from another country were processed and sold as indigenous olive oil.
202	FOOD STANDARDS & FOOD SAFETY POLICIES	Greece	December	Olive oil	From January 2018, Greece's restaurant and hospitality sector will be required to serve olive oil only in its original packaging, identifying the brand. The measure is meant to prevent refilling of old bottles with lower grade olive oil, thus promoting quality and protecting consumers from fraud. While comparable regulations are in place in Italy, Portugal and Spain, efforts to introduce EU-wide legislation to this effect were suspended back in 2013 (see <i>MPPU June '13</i>).
203	FOOD STANDARDS & FOOD SAFETY POLICIES	India	February	Trans fatty acid	The Government of India set 27 February 2017 as the enforcement date for both, the mandatory declaration of trans fat and saturated fat content on food product labels and the 5 percent limit for trans fatty acid content (by weight) in fats, oils and fat emulsions (see also <i>MPPU Sep. '15 & Sep. '16</i>).
204	FOOD STANDARDS & FOOD SAFETY POLICIES	India	March	Edible oil	The Food Authority of Punjab State started collecting and testing samples of numerous brands of edible oil/ghee sold in local markets. Reportedly, all sub-standard and adulterated oil products will be banned from the market. (On past instances of vegetable oil adulteration see <i>MPPU July '16</i> .)

No.	Domain	Country	Month	Product	Description *
205	FOOD STANDARDS & FOOD SAFETY POLICIES	India	March	Trans fat, saturated fat	India's Federal Food Safety and Standards Authority postponed to 30 June 2017 the compliance date for mandatory declaration of trans fat and saturated fat content on food product labels. The compliance date (originally set at 25 May 2016) has been postponed twice before. The deferment is meant to allow manufacturers to utilize the existing stock of their packaging materials. Conversely, entry into force of the 5 percent limit for trans fatty acid content (by weight) in fats, oils and fat emulsions remains effective 28 February 2017.
206	FOOD STANDARDS & FOOD SAFETY POLICIES	India	July	Edible vegetable oils	India's Food Standards and Safety Authority (FSSAI) invited public comments on a set of regulatory amendments concerning (i) the removal of the Boudouin test requirement for blended edible vegetable oils, and (ii) provisions regulating the sale of hydrogenated vegetable oils/fats.
207	FOOD STANDARDS & FOOD SAFETY POLICIES	India	July	Oils/fats	India's Food Safety and Standards Authority (FSSAI) informed that revised standards for oils and fats would come into force on 1 July 2017. The amended standards include a redefinition of inter-esterified vegetable fat and regulates the usage of food grade enzymes in oil refining processes.
208	FOOD STANDARDS & FOOD SAFETY POLICIES	India	July	Trans fat, saturated fat	FSSAI announced a further postponement in the compliance date for mandatory declaration of trans fat and saturated fat content on food product labels (see also <i>MPPU Apr.'16</i>). Reportedly, the new compliance date will be 30 September 2017 and no further extensions will be granted. The additional deferral is meant to allow manufacturers to utilize existing stocks of packaging material.
209	FOOD STANDARDS & FOOD SAFETY POLICIES	India	November	Trans fat, saturated fat	India's Food Safety and Standards Authority announced a further postponement in the compliance date for mandatory declaration of trans fat and saturated fat content on food product labels (see also <i>MPPU Aug.'17</i>). The new compliance date will be 31 December 2017. The additional deferral was granted to allow manufacturers to utilize existing stocks of packaging material.
210	FOOD STANDARDS & FOOD SAFETY POLICIES	Myanmar	March	Vegetable oil	According to local press reports, the Government of Myanmar plans to take action against illegal vegetable oil imports and fraudulent sales of cooking oils in the country. Reportedly, some brands of groundnut and sesame oil sold on the domestic market were found to actually contain a mixture of different unidentified oils plus artificial fragrance.
211	FOOD STANDARDS & FOOD SAFETY POLICIES	Peru	November	Trans fatty acid, saturated fat	As part of efforts to promote a healthy diet, Peru's Health Ministry released a manual with detailed specifications for the inclusion of warnings on food product labels when the saturated fat, trans fat, salt or sugar content exceeds specific thresholds. The manual has been notified to the World Trade Organization for member country comments.
212	FOOD STANDARDS & FOOD SAFETY POLICIES	Thailand	December	Trans fatty acid	With a view to reduce consumers' risk of heart disease, the Thai Food and Drug Administration drafted a new requirement that would ban the use of partially hydrogenated oils in foods. The proposed ban is consistent with global efforts to eliminate industrially produced trans fats from foods, with complete bans set to come into force during 2018 in Canada and the United States (see <i>MPPU July'15 & Oct.'17</i>).
213	FOOD STANDARDS & FOOD SAFETY POLICIES	Turkey	November	Vegetable oil	Turkey's Ministry of Food, Agriculture and Livestock postponed – for the seventh time – the implementation of its Product Verification Monitoring System (PVSM), amid industry concerns about cost and food safety issues arising from mandatory product verification and labelling. The new schemes' main objective is to eliminate adulterated foods, imitations and fraud in six food categories, including vegetable oil.

No.	Domain	Country	Month	Product	Description *
214	FOOD STANDARDS & FOOD SAFETY POLICIES	United States	August	Soybean oil	Responding to a petition filed by a large agribusiness and food company, the U.S. Food and Drug Administration decided to allow food manufacturers and restaurants to make qualified health claims linking soybean oil to a reduced risk of coronary heart disease. The decision is based on 'supportive but not conclusive evidence' that eating soybean oil – which contains unsaturated fatty acids – may provide heart health benefits, provided soybean oil is to replace (or not to increase) saturated fat intake and does not raise daily caloric intake.
215	FOOD STANDARDS & FOOD SAFETY POLICIES	United States	November	Soybean protein	The U.S. Food and Drug Administration proposed to revoke an authorized health claim that links soy protein consumption to reduced risk of heart disease, citing inconsistent results from research conducted since the claim was authorized in 1999. Companies currently using the health claim on food product labels may continue to do so until the agency takes a final decision.
216	FOOD STANDARDS & FOOD SAFETY POLICIES	United States	December	Trans fatty acid	A study undertaken by the United States Department of Agriculture, assessed product turnover in the U.S. food industry and looked into implications for nutrient content – focusing on three health-relevant ingredients: salt, sugar and fat. Upon examining product entries and exits in high-turnover food categories (i.e. breakfast cereals, yogurts, snacks and refrigerated/frozen meals), it emerged that, over the 2008–2012 period, sugar content has either fallen or remained unchanged in all five categories, while sodium content was gradually reduced in four categories. By contrast, saturated fat content has increased by statistically significant amounts in the four food categories that contain fat in meaningful quantities. Reportedly, these contradictory trends support the contention that policies focusing on reducing a single nutrient (such as salt) may not lead to overall healthier products as food manufacturers may compensate for deterioration in taste by increasing levels of other nutrients (such as fat). As for trans fatty acids, the study suggests that new federal labelling regulations and dietary guidelines have effectively reduced the trans fat content of US food products. Claims by some researchers that trans fats have for the most part been replaced by saturated fats are not corroborated by the study.
217	FOOD STANDARDS & FOOD SAFETY POLICIES	Global	July	Fish oil, vegetable oils, animal fat	The WTO/FAO Codex Alimentarius Commission issued its first standard for fish oil. The detailed standard, which applies to fish oil intended for human consumption, includes provisions for differentiating certain wild origin fish oils from their farmed counterparts. The Commission committed to monitoring the application of the new standard with respect to oil authenticity and traceability (in particular regarding fatty acid profiles) and to implications for trade. The Commission also deliberated on modifications to a number of existing or draft standards concerning oilcrops and derived products, viz.: the standard for olive oils and olive pomace oils; the standard for fat spreads and blended spreads; the standards for both named and unspecified vegetable oils (concerning, specifically, groundnut oil, rice brain oil, high-oleic palm oil, virgin palm oil, crude palmkernel oil, sunflowerseed oil, flaxseed oil and selected fruit/treenut oils); the Asian standards for tempe and non-fermented soybean products; and the African standard for unrefined shea butter.
218	FEED STANDARDS	Canada	May	Camelina oil	Canada's Food Inspection Agency (CFIA) approved the use of mechanically extracted camelina oil as a feed ingredient for farmed fish. Camelina oil is viewed as a cost-effective replacement of wild-sourced fish oils in aquaculture feed. The approval paves the way for <i>camelina sativa</i> to serve as a new rotation option for potato farmers in Maritime Canada. In recent years, <i>camelina sativa</i> started attracting interest in the EU, the United States and Canada due to the suitability of its oil for a variety of uses, including as feedstock in the production of road and aviation biofuel (see also <i>MPPU Apr.'13, Feb. '14, Feb. '15, Feb./June '16 & Feb. '17</i>).

No.	Domain	Country	Month	Product	Description *
219	FEED STANDARDS	Japan	May	Oilmeals	The Japanese Government cleared a proposal to permit mixing selected oilmeals with feed maize in the production of compound feed. In the past, maize could only be mixed with animal protein such as fishmeal.
220	GMO POLICIES	Argentina	November	Soybeans	Argentina's Agricultural Ministry has approved the use of genetically modified soybean seed 'SYN-000H2-5'. The new variety is resistant to herbicides other than glyphosate – a key trait, considering growing resistance of weeds against glyphosate.
221	GMO POLICIES	Australia	June	Rapeseed	In the Parliament of West Australia, a petition was filed calling on the State Government to compensate farmers when GM-rapeseed contamination causes them to lose their GM-free or organic certification. According to the motion, GM contamination can create significant economic losses or extra costs, because GM-rapeseed or rapeseed tainted with GM material command lower prices per tonne on world markets. Although cultivation of GM-rapeseed has been allowed in three Australian States (comprising West Australia), the country remains the world's leading supplier of GM-free rapeseed – including to the lucrative EU market (see also <i>MPPU June '14, Nov. '15 & Sep. '16</i>).
222	GMO POLICIES	Canada	May	GM food	The Canadian Parliament voted against a private member's bill calling for mandatory labelling of genetically modified foods. The debate in Canada follows last year's passage, in the United States, of a bill introducing mandatory GM-labelling over a three-year period (see <i>MPPU Aug. '16</i>).
223	GMO POLICIES	China	January	Soybean	China has granted import approval for <i>Balance GT</i> , a new soybean variety characterized by tolerance to both glyphosate and isoxaflutole-based herbicides. China's approval follows the import authorizations provided by Canada, the European Union and the United States (see also <i>MPPU Aug. '16</i>). However, <i>Balance GT</i> will not be commercially available until <i>Balance Bean</i> , the herbicide specifically developed for use on the new soybean variety, has received the required regulatory approval by the United States Environmental Protection Agency.
224	GMO POLICIES	China	May	Soybean	As part of recent trade negotiations between China and the United States, China agreed to accelerate the evaluation of eight US-developed genetically modified crops, including two soybean varieties. Pending the Chinese authorities' import approval, the concerned seed companies opted to delay the new varieties' commercial release.
225	GMO POLICIES	China	June	GM crops	China's Ministry of Agriculture renewed import approvals for 14 GMO crops and approved two new GMO crops, as the country accelerated its evaluation of GM-products under broader efforts to promote economic and trade ties with the United States (see <i>MPPU June '17</i>). In China, the planting of GM food crops remains prohibited, but GMO imports are allowed for use in the country's animal feed industry. The recent approvals, which are valid for a three-year period lasting until 2020, include three dated rapeseed varieties, four dated soybean varieties and one new soybean variety (<i>Monsanto's "Vistive Gold"</i>). Another new, US-developed soybean variety, <i>DowAgroSciences' "Enlist"</i> , is still awaiting approval.
226	GMO POLICIES	European Union	December	Oilseeds	The European Commission authorized five new GM oilseed varieties for food/feed use, comprising four soybean and one rapeseed varieties. The authorizations, which exclude cultivation, will be valid for 10 years. All products derived from the GMOs will be subject to the bloc's labelling and traceability rules.

No.	Domain	Country	Month	Product	Description *
227	GMO POLICIES	India	May	Mustard seed	The Genetic Engineering Approval Committee (GEAC) of India's Environment Ministry backed the commercial use of an indigenously developed GM mustard seed. Last year, GEAC already provided its technical clearance, following favourable crop trials and safety tests (see <i>MPPU Sep.'16</i>). Pending the final approval by the Federal Government, the product could become the country's first GM food crop cleared for commercial production (see also <i>MPPU Mar.'15</i>).
228	GMO POLICIES	India	September	Oilseeds, mustard seed	Indian ministry officials informed that the Government's final decision with respect to the commercial release of GM oilseeds – notably of a locally developed mustardseed variety – remained pending (see also <i>MPPU Sep.'16</i>). Reportedly, the Government requires more time to examine various expert studies, including (i) new information submitted by GEAC, the ministerial Genetic Engineering Appraisal Committee, and (ii) a report prepared by a parliamentary committee, which flagged alleged gaps in the Government's evaluation process. In the meantime, a note released by India's National Academy of Agricultural Sciences underlined the importance of GM oilseed varieties for production and farm income growth in the country.
229	GMO POLICIES	Mexico	January	GM crops	The Government of Mexico invited public comments on a plan to introduce new assessment criteria governing the experimental release of GMOs, such as maize, soybeans and other GM crops or animals.
230	GMO POLICIES	Mexico	November	Soybean	Mexico's phytosanitary agency (SENASICA) decided to revoke the permission to commercialize genetically modified soybean seed 'MON-0432-6', following the variety's detection in areas where its cultivation was not permitted.
231	GMO POLICIES	Turkey	August	Soybean	Turkey's Biosafety Board has approved the importation of three genetically modified soybean varieties and their products for feed use, raising the total number of approved GM soy events to ten. For another two GM varieties approval remains pending.
232	GMO POLICIES	United States	January	GM crops	USDA's Animal Plant Health Inspection Service (APHIS) proposed to revise its regulations regarding the importation, interstate movement and environmental release of GMOs. The proposed revisions are meant to (i) reflect advances in genetic engineering as well as past implementation experience, and (ii) reduce the burden on regulated entities. In the United States, APHIS is responsible for reviewing GM crops to determine whether they pose risks to domestic agriculture. The proposed new rule will remain open for comment until 19 May 2017.
233	GMO POLICIES	United States	November	GM crops	The U.S. Animal and Plant Health Inspection Service (APHIS), decided to withdraw a change to its biotechnology regulations put forward earlier this year (see <i>MPPU Feb.'17</i>). APHIS is responsible for reviewing GM crops to determine whether they pose risks to domestic agriculture. The modifications the agency had proposed represented a major change from APHIS' existing 'regulate first/analyze later' approach to one that entailed assessing risks first and then regulating organism that did present risks. Reportedly, after receiving many comments objecting to the scope of the proposed change, APHIS decided to re-engage with stakeholders to determine the most effective, science-based approach for regulating GMO products while protecting plant health.

No.	Domain	Country	Month	Product	Description *
234	OTHER POLICIES – <i>Production sustainability</i>	European Union	May	Palm oil-based biodiesel	The European Parliament passed a resolution calling for the introduction of a single mandatory certification scheme for Europe-bound palm oil, in a bid to ensure that all palm oil entering the bloc is produced in an environmentally and socially sustainable way. To prevent the EU's renewable fuel targets from inadvertently contributing to deforestation, the resolution also recommends phasing out, by 2020, the use of biofuels produced from palm oil and other vegetable oils purportedly produced in an unsustainable way. Reportedly, the resolution was influenced by the observation that the certification schemes currently in use – such as the independent Roundtable on Sustainable Palm Oil (RSPO) or the national schemes introduced by Indonesia (ISPO) and Malaysia (MSPO) – do not enforce blanket bans on forest and peatland clearance. Essentially, in its non-binding resolution addressed to the European Commission, the Parliament suggested that only sustainably produced palm oil – according to its own criteria – should enter the bloc. The motion faced strong criticism from palm oil producing countries, which labeled the initiative as discriminatory and protectionist. Last year, the EU imported approximately 7 million tonnes of palm oil, of which about half was used for biodiesel production. The bloc is the world's second largest importer of palm oil after India.
235	OTHER POLICIES – <i>Production sustainability</i>	France	July	Palm oil	France's Environment Ministry is considering to introduce measures restricting the use of palm oil in biofuels, based on the alleged prevalence of unsustainable production methods in countries of origin. Details of possible domestic measures have not been provided. Past proposals to introduce – also on environmental grounds – a surtax on crude palm oil imports destined for food use failed to obtain parliamentary approval (see <i>MPPU Apr.'16</i>).
236	OTHER POLICIES – <i>Production sustainability</i>	Indonesia	March	Palm oil	Indonesia renewed her efforts to implement a mandatory national certification schemes for sustainably produced palm oil – as opposed to the widely used voluntary certification through RSPO, the global, internationally recognized and industry-backed standard setting body for palm oil. In recent years, the Government of Indonesia has become increasingly concerned that RSPO could place local stakeholders in a disadvantaged position, by (i) imposing overly stringent requirements, (ii) applying high certification costs, and (iii) paying insufficient attention to the needs of smallholder oil palm growers. Consequently, Indonesia issued a state-backed sustainability standard for palm oil, called Indonesian Sustainable Palm Oil (ISPO). To date, however, international acceptance of Indonesia's national standard remained low – despite efforts to streamline ISPO with RSPO (see also <i>MPPU June&Aug.'11, May'12, Apr.&Dec.'13, May'14, and Mar.'16</i>). To address this issue, in February 2017, Indonesia has taken steps to gain the EU's recognition for palm oil produced in compliance with national laws and regulations. Reportedly, Indonesia is working on a scheme similar to its domestic timber legality assurance system, which conforms fully to the EU code on Forest Law Enforcement Governance and Trade (FLEGT). Indonesia and the EU are working on this initiative under the recently established Working Group on Environment and Climate Change.

No.	Domain	Country	Month	Product	Description *
237	OTHER POLICIES – <i>Production sustainability</i>	Indonesia	May	Forest, peatland	Indonesia's President approved a two-year extension of a moratorium on issuing new licenses for the use of land designated as primary forest and peatland in the country (see also <i>MPPU June & Aug. '16</i>). The six-year-old moratorium was scheduled to expire on 20 May 2017. Aimed at halting deforestation and pollution resulting from forest fires, the moratorium is said to concern a total of 66 million hectares. According to government officials, the latest extension gives concerned authorities more time to improve rules on forest and peatland governance and gather material to manage licenses more effectively. A number of civil society groups pointed out that forest cover losses remained high during the past six years. Allegedly, during 2014–2015, 1.5 million ha of forest cover were lost. Furthermore, some NGOs claimed that the recurrent outbreak of fires on forestland and drained peatland was to a large extent driven by plantation expansions in the oil palm, wood and paper sectors. While government sources reckoned that some land conversion continued due to permissions issued prior to the moratorium, NGO's stressed that a number of factors compromised the moratorium's effectiveness, notably: i) enforcement problems arising from decentralized decision-making; ii) disputes over land tenure; and iii) the circumstance that the moratorium was issued in the form of a presidential instruction, which does not entail legal consequences for perpetrators. A group of forestry experts urged that the moratorium on permits be complemented with livelihood programmes for locals to facilitate the generation of local income from forests without involving conversion.
238	OTHER POLICIES – <i>Production sustainability</i>	Indonesia	July	Oil palm	Indonesia's Environment Minister proposed to turn the country's temporary moratorium on issuing new licenses for the use of land designated as primary forest and peatland into a permanent ban. In place since 2011, the moratorium has been renewed for a third time – until May 2019 – earlier this year (see <i>MPPU June '17</i>).
239	OTHER POLICIES – <i>Production sustainability</i>	Indonesia	August	Palm oil	To date 1.9 million hectares of oil palm plantations – i.e. 17 percent of the country's total area under oil palm cultivation – have been certified under the Indonesia Sustainable Palm Oil (ISPO) standard. Launched with the support of the Government in 2011 and implemented on a mandatory basis since 2015, ISPO was designed to guarantee the adoption of comprehensive environmental and social standards and ensure compliance of plantations with national rules and regulations. (See also <i>MPPU Apr. '17 on efforts to accelerate ISPO's domestic adoption and international recognition</i> .)
240	OTHER POLICIES – <i>Production sustainability</i>	Malaysia	March	Palm oil	Malaysia renewed her efforts to launch a binding national certification scheme for sustainably produced palm oil – as opposed to the widely used voluntary certification through RSPO, the global, internationally recognized and industry-backed standard setting body for palm oil. Like Indonesia, Malaysia has become increasingly concerned that RSPO could place local stakeholders in a disadvantaged position, by (i) imposing overly stringent requirements, (ii) applying high certification costs, and (iii) paying insufficient attention to the needs of smallholder oil palm growers. Consequently, in 2014, Malaysia started developing a state-backed, voluntary standard known as MSPO or Malaysian Sustainable Palm Oil (see also <i>MPPU May/July/Dec. '14 & Aug. '15</i>). In February 2017, government officials announced a timeline for the standard's mandatory application: compliance will be implemented in stages, with RSPO-certified estates, non-certified estates, and smallholder growers required to obtain MSPO certification by, respectively, 31 December 2018, 30 June 2019 and 31 December 2019. The measures is aimed at making MSPO a globally recognized standard.

No.	Domain	Country	Month	Product	Description *
241	OTHER POLICIES – <i>Production sustainability</i>	Malaysia	May	Palm oil	The principles and criteria for MSPO (Malaysian Sustainable Palm Oil), the government-backed sustainability certification for oil palm that is due to become mandatory in Malaysia, will be revised to make it more compatible with international standards, according to the local press. Reportedly, during the exercise, care will be taken to keep the certification process affordable and tailored to the specific needs of domestic producers (see also <i>MPPU Apr.'17</i>).
242	OTHER POLICIES – <i>Production sustainability</i>	Malaysia, Indonesia, European Union	July	Palm oil-based biodiesel	The Governments of Malaysia and Indonesia informed that they would consider challenging at WTO level possible measures by the European Union to restrict palm oil imports on sustainability grounds. The announcement is related to a recent resolution by the European Parliament that (i) calls for mandatory certification of all Europe-bound palm oil, and (ii) recommends phasing-out the use of biofuels made from palm oil and other vegetable oils purportedly produced in an unsustainable way (see <i>MPPU June'17</i>). Meanwhile, the two countries agreed to carry out a joint mission to Europe to engage with relevant parties and stakeholders, and informed that they were ready to work with trade partners in addressing their concerns over sustainability. The two governments will coordinate their actions under the Council of Palm Oil Producing Countries (CPOPC), an initiative set up by Malaysia and Indonesia to stabilize prices through concerted actions on production and stocks.
243	OTHER POLICIES – <i>Production sustainability</i>	Malaysia	August	Palm oil	Government officials confirmed that certification through the Malaysian Sustainable Palm Oil (MSPO) scheme will become mandatory for all palm oil growers by end 2019. The MSPO standard was developed to promote the adoption of best practices on sustainability throughout the supply chain, while conforming to domestic laws and regulations and taking into account the specific needs of local producers. To date about 244 600 hectares of oil palm – or 4.1 percent of the country's total area under oil palm – have undergone voluntarily certification, involving mostly large estates rather than small growers. Recognizing that small producers – who contribute about 40 percent of the country's palm oil production – struggle to meet the costs of certification, the government announced that independent and organized smallholders will receive financial incentives. Reportedly, the Government decided to set aside MYR 130 million (USD 31 million) to support some 650 000 small growers cultivating around two million hectares of oil palm. Furthermore, the Government renewed its commitment to promote MSPO overseas to ensure the standard is accepted in international markets. (See also <i>MPPU Apr.'17</i> on efforts to accelerate MSPO's domestic adoption and international recognition.)
244	OTHER POLICIES – <i>Production sustainability</i>	Malaysia	September	Palm oil	Regarding the government's pledge to support palm oil producers in conforming to the national standard for sustainable palm oil, or MSPO (see <i>MPPU Sep.'17</i>), ministry officials informed that audit costs will be subsidized at the following rates: 100 percent for small oil palm growers, i.e. organized or independent smallholders cultivating less than 40.46 hectares; 70 percent for estates with planted area between 40.5 and 1 000 hectares; and 30 percent for estates above 1 001 hectares as well as processing facilities (including mills, refineries and crushers).

No.	Domain	Country	Month	Product	Description *
245	OTHER POLICIES – <i>Production sustainability</i>	Malaysia	November	Palm oil	Earlier this year, the Government announced that it would fully cover the audit fees incurred by oil palm smallholders certifying their production under the Malaysian Sustainable Palm Oil scheme (MSPO) – the state-backed standard set to become mandatory across the industry by end-2019 (see <i>MPPU Sep. '17</i>). In October, ministry officials informed that also larger producers and processing facilities adopting MSPO certification would receive financial support. For estates cultivating between 40 and 1 000 hectares, 70 percent of audit cost would be covered, while estates above 1 001 hectares as well as crushers and refiners would be covered at a rate of 30 percent. In the meantime, the Government continued pursuing its efforts to obtain international acceptance of the standard, underlining that MSPO-certified palm oil is produced “balancing the needs of people, profit and planet”.
246	OTHER POLICIES – <i>Production sustainability</i>	Malaysia	November	Palm oil	The country's MSPO standard will be reviewed next year to strengthen it and bring it more in line with globally accepted norms, the Malaysian Palm Oil Certification Council said. Reportedly, new developments concerning greenhouse gas emissions and carbon savings warrant such review.
247	OTHER POLICIES – <i>Production sustainability</i>	Malaysia	November	Palm oil	According to local press reports, the Malaysian state of Sabah intends to proceed with its own palm oil certification strategy – while the federal Government moves ahead with nationwide implementation of the MSPO standard. Reportedly, Sabah's State Cabinet opted for the introduction of jurisdictional certification at state level back in 2015, i.e. before MSPO was launched. Under the local policy, all palm oil produced within the state is required to undergo – over the 2015–2025 period – sustainability certification. The programme's three main goals are i) to achieve zero loss of high conservation value and high carbon stock areas, ii) to exclude social conflict, and iii) to improve smallholder sustainability.
248	OTHER POLICIES – <i>Production sustainability</i>	Norway	June	Palm oil-based biodiesel	A resolution passed by the Norwegian Parliament calls on the country's Government to take steps to end – on environmental grounds – public procurement of palm oil-based biodiesel, while promoting the use of sustainably produced, advanced biofuels.
249	OTHER POLICIES – <i>Production sustainability</i>	Peru	May	Oil palm	The Peruvian Government committed to consult indigenous people (which typically do not possess recognized legal rights over their land) prior to approving oil palm projects that would affect them. Reportedly, the territories earmarked for oil palm expansion under the Government's 2016–2025 development plan include at least 13 indigenous communities.
250	OTHER POLICIES – <i>Consumption taxes</i>	Algeria	March	Soymeal	Effective 1 January 2017, the value-added tax on selected grain and feed products – including soybean meal (all of which is imported) – has been raised from 7 percent to 9 percent. As the measure directly affects sale prices, the tax increase could slow down Algeria's pace of soybean imports.
251	OTHER POLICIES – <i>Consumption taxes</i>	China	May	Oilseeds, oils, meals	The Ministry of Finance announced a reduction in the value-added tax on agricultural goods – effective 1 July 2017 – as part of ongoing reforms to simplify the country's tax structure and stimulate domestic consumption. The measure will apply to oilseeds and oilseed products, whether locally produced or imported.
252	OTHER POLICIES – <i>Consumption taxes</i>	China	November	Dried distillers grains	China's 11-percent value-added tax on imports of DDGs (dried distillers grains with solubles) will be removed on 20 December. Despite the tariff elimination, a resumption of DDGs imports from the United States appears unlikely, given that the anti-dumping and countervailing duties imposed on US-origin DDGs will remain in place (see also <i>MPPU Feb. '17</i>).

No.	Domain	Country	Month	Product	Description *
253	OTHER POLICIES – <i>Consumption taxes</i>	India	June	Oilseeds, meals, oils	Under India's new Goods & Services Tax, GST (rolled out on 1 July 2017), oilseeds and vegetable oils fall in the 5 percent tax category, blended oil and margarine attract 18 percent tax, and oilmeals are tax-exempted. Essentially, the new classification is comparable to that applied under the previous value-added tax regime. However, the country's industry associations demanded that oilseeds be moved to the zero tax bracket – akin to other essential commodities like rice, wheat and sugar, while blended oil and margarine should be taxed at 5 percent.
254	OTHER POLICIES – <i>Consumption taxes</i>	Malawi, East/ Southern Africa	September	Vegetable & animal oils/fats	In Malawi, vegetable and animal oils/fats and their derived products have been exempted from paying value added tax, effective 1 July 2017. As a result, refined oils/fats will no longer attract VAT at 16.5 percent. Aimed at protecting domestic refiners from the inflow of cooking oils that do not undergo value addition locally, the measure is expected to help the indigenous edible oil industry grow and domestic oilseed production expand. Reportedly, analogous measures are in place in Zimbabwe, the United Republic of Tanzania, Mozambique and the Rep. of South Africa, while, in Zambia, the edible oil industry repeatedly called on the local government to implement a similar policy (see also <i>MPPU Aug. '13</i>).
255	OTHER POLICIES – <i>Social policies</i>	Ghana	September	Palm oil	As part of a newly launched programme that offers free education at senior high school level, the Ghanaian Government contracted the country's association of small-scale palm oil producers to supply palm oil (for cooking oil use) to concerned schools nationwide. Reportedly, farmers are preparing to expand oil palm cultivation to meet the anticipated increase in palm oil demand.
256	OTHER POLICIES – <i>Transport infrastructure</i>	Brazil, China	May	Soybean	The Governments of Brazil and China announced the creation of an investment fund for infrastructure projects. The fund will be valued at USD 20 billion, with Brazil and China contributing, respectively, one-fourth and three-fourths of the resources. Reportedly, China is eager to invest in railroad, highway and port projects that could lower the cost of raw agricultural products such as soybeans being shipped to China. One such project is the 'Ferrogrão' (or Grain Railway) that would connect grain production regions in northern Mato Grosso to Miritituba, a river port in the Amazon Basin (see also <i>MPPU Feb. & Aug. '16</i>).
257	OTHER POLICIES – <i>Transport infrastructure</i>	Brazil	June	Grains, oilseeds	Government officials reported further improvements in Brazil's northern port infrastructure. In recent years, the development of new export corridors in the country's so-called "Arco Norte" region (see <i>MPPU Aug. '16</i>) attracted significant private and public funding. Based on the latest investments, industry experts estimate today's combined shipment capacity of ports located along Brazil's north-Atlantic coast at 40 million metric tonnes of grains per year, with projections for 2025 pointing to 64 million tonnes. For marketing year 2017/18, actual exports via the new export corridors have been pegged at 27 million tonnes (i.e. 26 percent of Brazil's aggregate maize and soybean production), which compares to only 7 million metric tonnes (or 16 percent of the combined maize/soy output) in 2009/10. Hand in hand with this increase, a decongestion in shipments via the traditional south-bound routes has been observed, with ports along the Brazil's south-east/southern coast gradually shifting their vocation to container traffic and shipments of higher value-added products. Reportedly, in order to fully realize the potential of the new north-bound export channels, a number of road and rail links remain to be completed, paying due attention to environmental considerations. This concerns in particular the paving of 160 km of highway BR-163, the upgrading of highway BR-364, and the "Ferrogrão" railway project (see also <i>MPPU June '17</i>).

No.	Domain	Country	Month	Product	Description *
258	OTHER POLICIES – <i>Transport infrastructure</i>	Brazil	July	Grains, oilseeds	According to industry sources, protests along Brazilian highway BR-163 have affected the flow of grains and oilseeds to the country's northern ports. The highway links the state of Mato Grosso to Miritituba, the barge terminal connected with the north-Atlantic ports of Barcarena and Santarém. According to official sources, the recently opened northern export corridor was expected to absorb around one-fourth of Brazil's aggregate maize and soybean production in 2017/18 (see <i>MMPU July'17</i>). Reportedly, the highway was blocked by local residents, merchants and farmers who asked for increased access to the region's protected national forest areas.
259	OTHER POLICIES – <i>Transport infrastructure</i>	Brazil	August	Grains, oilseeds	Brazil's Transport Ministry has allocated the sum of BRL 128.5 million (USD 41.2 million) for paving 65 km of highway BR-163, i.e. the last unpaved stretch of the key artery that links Mato Grosso state – the country's Centre-west grain hub – to Brazil's newly opened ports on the north-Atlantic coast. Based on government estimates, upon the works' completion, Brazil's northern export corridor (or "Arco Norte") would absorb around one-fourth of Brazil's aggregate maize and soybean production (see <i>MPPU July'17</i>). Industry sources, on the other hand, pointed to the need for additional investments in the region's infrastructure. With northbound shipments from Mato Grosso depending on a single highway, the likelihood of temporary disruptions remains high, private sources opined (see also <i>MPPU Aug. '17</i>).
260	OTHER POLICIES – <i>Transport infrastructure</i>	Brazil	November	Grains, oilseeds	With a view to address historical infrastructure bottlenecks, the Government of Mato Grosso – the country's leading grain-producing state – has invited bids for the construction and operation of new roads. Initially, licenses for three stretches of roads totaling 525 km will be awarded, but, by the end of 2018, licenses for a total of 3 125 km are expected to be granted. At the same time, the private sector has renewed its calls to include a railroad linking Mato Grosso with ports in the Amazon Basin in the Government's infrastructure investment plans. Reportedly, the proposed railroad (dubbed Grain Railway or 'Ferrogrão') would extend over 1 142 km (see also <i>MPPU July & June '17</i>).
261	OTHER POLICIES – <i>Transport infrastructure</i>	Brazil	December	Grains, oilseeds	Four international grain trading companies are considering to submit a joint bid for the 'Ferrogrão' grain railroad project that would link Mato Grosso state with transshipment ports in the Amazon basin (see also <i>MPPU July & Dec. '17</i>). Another bid is likely to come from a group of Chinese state-owned firms (see <i>MPPU June '17</i>). Total construction costs for the new rail line, which would allow moving approximately 42 million tonnes of grains per year, have been estimated at BRL 14 billion (USD 4.4 billion), and contractors would be awarded a 65-year license from the government to operate the railroad. The project is said to face local opposition from indigenous communities, subsistence farmers and mining companies.

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Note that for related historic information the reader is directed – between brackets, in italic print – to past issues of the *Oilcrops Monthly Price and Policy Update (MPPU)*, which can be retrieved on-line at <http://www.fao.org/economic/est/publications/oilcrops-publications/monthly-price-and-policy-update/en/>.

Table 3. Industry measures and initiatives reported in 2017

No.	Domain	Month	Country	Description *
1	INDUSTRY STANDARDS – Sustainable oil palm	January	Indonesia	Responsible production pledge: An Indonesian industry group agreed to stop clearing forest until sustainability assessments can be made on 75 000 ha of forest under a palm oil concession in Papua Province. Reportedly, the group considers following the 'High Carbon Stock Approach' in its assessments, which would imply using independent assessors, publishing the results and seeking independent verification of compliance.
2	INDUSTRY STANDARDS – Sustainable oil palm	January	Indonesia	Responsible sourcing commitments: Global consumer goods company <i>Unilever</i> informed that it will adopt a jurisdictional approach to palm oil sourcing by preferentially buying from areas that have in place comprehensive climate and forest policies. Accordingly, the company has signed a three-year Memorandum of Understanding with the provincial government of Central Kalimantan (Indonesia) and other local partners to promote, at village level, sustainable palm oil production by certified smallholders. The new form of palm oil sourcing is said to build on close public-private collaboration.
3	INDUSTRY STANDARDS – Sustainable oil palm	January	Ivory Coast	Certification assistance: In Côte d'Ivoire, civil society group <i>Solidaridad</i> and <i>RSPO</i> (the world's leading industry-backed standard setting body for palm oil) will jointly implement a large group certification programme targeting 5 000 smallholders. The three-year project is aimed at making sustainable production of palm oil the norm in the country. Côte d'Ivoire is Africa's third largest producer of palm oil.
4	INDUSTRY STANDARDS – Sustainable oil palm	January	Global	Responsible lending policies: Environmental advocacy groups continue pressing international banks to induce oil palm companies to adopt sustainable production practices (see <i>MPPU Apr.'16</i>). A report released by <i>Greenpeace International</i> claims that one of the largest providers of financial services to the palm oil industry provided loans and other financial services to companies that allegedly harmed tropical rainforest, infringed labour laws and disregarded operating licenses. By doing so, the bank is said to have breached its own corporate policy regarding sustainability in forestry and agricultural production, including specific sections on palm oil. The report, which states that also other banks' lending activities are problematic, urges banks and institutional investors to actively engage with palm oil companies on corporate strategy and behaviour prior to agreeing to provide new (or renew on-going) financial services.
5	INDUSTRY STANDARDS – Sustainable oil palm	January	Global	Responsible sourcing commitments: Global agri-business trader <i>Cargill</i> reported on the company's progress and goals regarding deforestation and pledged to protect forests in six priority supply chains, including palm oil and soybean. The company committed to implement specific action plans and offer training programmes to farmers and suppliers – in close collaboration with their customers, governments, NGOs and other stakeholders.
6	INDUSTRY STANDARDS – Sustainable oil palm	January	Global	Responsible sourcing commitments: Global products and services company <i>DuPont</i> reported that it has completed its switch to 100% RSPO-certified sustainable palm oil and palm oil derivatives in its global emulsifier production – a process the company started in 2009. Reportedly, the transition was delayed by insufficient market demand and a shortage of certain certified palm oil derivatives. Now the company aims to move from sourcing its products through <i>Book&Claim</i> mechanisms to buying through physical supply chains.

No.	Domain	Month	Country	Description *
7	INDUSTRY STANDARDS – Sustainable oil palm	March	Malaysia	Certification assistance: In Malaysia, global agri-business firm <i>Cargill</i> joined forces with a social society group to support the inclusion of independent oil palm smallholders in certification. Under the project, independent growers, dealers, mills and refiners are provided with technical assistance to help them adopt responsible and efficient practices, increase their yields, and obtain certification. Reportedly, in total, 175 smallholder growers have received RSPO certification. The initiative's long-term objective is to develop a critical mass of smallholders and create a self-sustaining group scheme able to provide an uninterrupted flow of RSPO certified sustainable palm oil.
8	INDUSTRY STANDARDS – Sustainable oil palm	March	United Kingdom	Certification – Market incidence: According to recently published government data, in the United Kingdom, annual uptake of RSPO-certified sustainable palm oil almost tripled between 2009 and 2015 (see also <i>MPPU Dec. '15</i>). Out of the 457 thousand tonnes sourced through RSPO-backed supply chain models in 2015, about 326 thousand tonnes were segregated and mass-balanced palm oil, whilst <i>Book&Claim</i> certificates accounted for 131 thousand tonnes. While purchases by food manufacturers and retailers consisted almost entirely of certified palm oil, in the food service sector, certified palm oil accounted for only 67 percent of total purchases. Civil society groups urged policy makers to stick to the target of sourcing 100 percent certified palm oil. In addition, they recommended to broaden that policy to include palm oil derivatives and palm oil in imported finished products.
9	INDUSTRY STANDARDS – Sustainable oil palm	March	Global	Responsible sourcing commitments: Global food company <i>Kraft Heinz</i> committed to achieving a sustainable and traceable palm oil supply chain. The food manufacturer pledged to source only RSPO-certified palm oil and to regularly report on progress. Civil society groups pointed out that the company's policy lacked a timeline for implementation. The general question whether RSPO's current basic principles are sufficiently stringent to prevent unsustainable practices completely was also raised.
10	INDUSTRY STANDARDS – Sustainable oil palm	March	Global	Responsible lending policies: Global lending institution <i>HSBC</i> decided to review its loan policies for the palm oil sector and met with <i>Greenpeace</i> to discuss its request to adopt stricter standards to protect high-carbon-stock (HCS) forests and peatland (see also <i>MPPU Feb. '17</i>). The bank said it is open to tighten its policies as society's expectations change and new standards emerge. Itself a member of RSPO, the bank said it supports the full incorporation of the HCS Convergence Agreement into RSPO's standards. Meanwhile, <i>HSBC</i> has expanded its 'prohibited business commitment', making it consistent with the 'No deforestation, No Peat and No Exploitation' policies that are increasingly common in the palm oil supply chain. <i>HSBC</i> also pledged to close its relationship with companies that do not comply with its policies. The bank underlined that growers, processors, consumer good companies and banks need to work together more successfully to promote a sustainable palm oil sector. <i>Greenpeace</i> considered <i>HSBC</i> 's initiative as an important first step, which sends a clear signal to other banks to follow suit.
11	INDUSTRY STANDARDS – Sustainable oil palm	May	Colombia	Certification advances: A Colombian oil palm grower has become the first producer to receive <i>RSPO-Next</i> certification, a voluntary add-on module launched in 2016 engaging RSPO members to exceed the body's basic sustainability standard, notably with regard to deforestation, peatland development and indigenous peoples' rights (see <i>MPPU July '15 & Mar. '16</i>).
12	INDUSTRY STANDARDS – Sustainable oil palm	May	Southeast Asia	Promotion of sustainable production: An international consortium on Sustainable Agricultural Landscapes in Southeast Asia (SALSA) has been launched in Malaysia and Indonesia. The founding members are France's agricultural research centre CIRAD, two plantation companies, an Indonesian plantation crop research network and the Asian and Pacific Coconut Community (APCC). The overall objective of the public-private partnership is to promote sustainability and deliver specialized training in major commodity chains, including palm oil.

No.	Domain	Month	Country	Description *
13	INDUSTRY STANDARDS – <i>Sustainable oil palm</i>	May	Global	<p>Certification advances: The globally recognized self-regulating industry body for palm oil, RSPO (Roundtable on Sustainable Palm Oil), has launched the review of its standards – an exercise the body conducts every five years, to ensure that its criteria remain relevant and reflect stakeholder understanding of good sustainability practices. RSPO expects to adopt a revised set of principles and criteria by November 2018. Reportedly, the revision will focus on, inter alia, i) making standards more measurable and objective, ii) the inclusion of smallholders, iii) deforestation; iv) product traceability, v) human and labour rights, and vi) jurisdictional certification approaches (see <i>MPPU July '15 & Nov. '16</i>).</p> <p>Certification – compliance issues: Recently, RSPO has taken action against specific members for allegedly violating the organization's codes of practice. In one case, RSPO claimed that a member had violated community rights by not following the proper legal process for obtaining land from an indigenous group, thus recommending that the disputed land be re-measured for development approval with better community participation, while the company would renegotiate the terms for planting oil palm on the land. In another case, RSPO claimed that a member had carried out deficient High Conservation Value (HCV) assessments and had set aside inadequate areas to protect HCV areas, thus requesting the concerned company to suspend all land clearing operations. RSPO also reproached a former member for its alleged destruction of primary forest. Civil society groups following these disputes view them as important test cases for RSPO and the organization's ability to uphold its own standards and regulations.</p> <p>Certification assistance: Emulating similar efforts in the Asian continent, global agri-business firm Cargill has launched a programme aimed at promoting sustainable palm oil production in Latin America. In partnership with a local trading company and an international non-profit organization, the company plans to support 480 oil palm smallholders in Colombia over a 2-year period. Reportedly, participating farmers will receive direct training and support on good agricultural practices and improved farm management techniques, covering the areas of health, safety, and environmental/social impact management. While participants are expected to gain improved access to the global market through the adoption RSPO principles and criteria, the initiative is also meant to support Cargill's objective of setting up its own, fully traceable and sustainable palm oil supply chain by 2020.</p> <p>Production practices – company liabilities: Indonesia's main palm oil and timber associations are seeking, via a judicial review, to reduce their liability for fires that occur on their land, and to ban slash-and-burn practices by small farmers. The initiative is linked to ongoing discussions over who bears responsibility for the fires that occur annually across the country when peatland is drained to develop oil palm and timber plantations. Reportedly, environmental and social advocacy groups are defending the regulations contested by the industry associations, pointing out that, as far as small farmers are concerned, a the proposed ban on traditional land clearing methods would pose threats to indigenous people whose livelihoods depend on agriculture.</p>
14	INDUSTRY STANDARDS – <i>Sustainable oil palm</i>	May	Global	
15	INDUSTRY STANDARDS – <i>Sustainable oil palm</i>	June	Colombia	
16	INDUSTRY STANDARDS – <i>Sustainable oil palm</i>	June	Indonesia	

No.	Domain	Month	Country	Description *
17	INDUSTRY STANDARDS – Sustainable oil palm	June	Global	Global trade in certified product: The Roundtable on Sustainable Palm Oil (RSPO), the world's principal private entity for voluntary certification of sustainably produced palm oil, informed that physical sales of certified sustainable palm oil have seen a 43 percent rise in the first five months of 2017, compared with the same period last year. Reportedly, the increase was particularly evident within the 'identity preserved' and 'mass balance' supply chains. By contrast, sales through the 'Book&Claim' chain model (which bypasses the physical supply chain and thus contributes only indirectly to sustainable production) has seen a significant contraction last year. RSPO said it will closely monitor the on-going shift between certification methods, because the 'Book&Claim' mechanism plays a fundamental role in linking growers who do not have access to the physical supply chain to the market for certified produce. Meanwhile, the issue that total supplies of certified produce significantly exceed actual sales persists: the latest sales statistics suggest that roughly half of the available certified supply does not find a buyer and is sold as conventional palm oil, i.e. without fetching a price premium.
18	INDUSTRY STANDARDS – Sustainable oil palm	June	Global	Certification – children's rights: A recently signed MoU between RSPO and the United Nations Children's Fund (UNICEF) aims at changing business practices on children's rights and workers' welfare in the palm oil sector. The initiative envisages joint workplace programmes on the rights of children and working families, while RSPO also committed to raising awareness amongst members and mainstreaming child rights into its sustainability standards.
19	INDUSTRY STANDARDS – Sustainable oil palm	June	Global	Monitoring production practices: RSPO partnered with the World Resources Institute (WRI) to create "GeoRSPO", an interactive mapping platform featuring concession maps submitted by grower members – overlaid with outside information on tree cover, topography, past fire occurrence and new fire alerts. The system is described as a powerful analytical tool to monitor developments on RSPO members' palm oil concessions. (See also <i>MPPU July'16 on a comparable initiative</i> .)
20	INDUSTRY STANDARDS – Sustainable oil palm	June	Global	Marketing strategies – litigation case: Confectionary group Ferrero – known for its hazelnut-cocoa spread 'Nutella' that uses palm oil as an ingredient – has won a court case against food retailer Delhaize, who claimed that its rival palm oil-free spread was healthier and more sustainable than spreads containing palm oil. The ruling issued by the Belgian Court of Appeal states that the retailer's claims were "unverifiable, unsubstantiated by fact-based claims, and therefore not objective" in relation to both environmental and health allegations made against palm oil.
21	INDUSTRY STANDARDS – Sustainable oil palm	July	Global	Responsible lending policies: Last year, social society groups urged global lending institutions and investors to play a more prominent role in persuading clients operating in the oil palm business to adopt sustainable production practices (see <i>MPPU Apr.'16 & Feb.'17</i>). Subsequently, international lending institution HSBC carried out a review of its loan policies for the palm oil sector, eventually adopting stricter standards to protect primary forests and peatland (see <i>MPPU Apr.'17</i>). According to recent media reports, in July 2017, the named bank triggered a probe into a client palm oil company over specific deforestation allegations. RSPO, the industry standards setting body to which both the bank and the concerned company are members, recently opened an investigation over claims that the concerned company was ready to clear 18 000 hectares of primary forest in Papua (Indonesia) to set up a new oil palm plantation. The move is meant to ensure that the RSPO's sustainability standards are observed. Reportedly, RSPO advised the company to suspend all further development on the concerned concession pending the agency's independent assessment. Meanwhile, following HSBC's example, several other banks started moving to adopt stricter lending policies based on "no deforestation–no peat–no exploitation" commitments, the media reported.

No.	Domain	Month	Country	Description *
22	INDUSTRY STANDARDS – <i>Sustainable oil palm</i>	August	Global	Certification initiative: An independent certification scheme, the International Palm Oil Free Certification Accreditation Programme (POFCAP), has been launched to allow interested food makers to demonstrate that their products were manufactured without using palm oil or palm oil derivatives. The new scheme was developed to respond to growing consumer demand for transparency over the use of palm oil in processed foods. Reportedly, POFCAP has been approved by regulators in Australia and the UK, while applications are still pending in several other countries. POFCAP bars companies from using language implying that POFCAP recommends a given product over competing products.
23	INDUSTRY STANDARDS – <i>Sustainable oil palm</i>	September	India	Promotion of sustainable production & certification: The international NGO <i>Solidaridad Network</i> , in association with India's Solvent Extractors' Association (the country's national vegetable oil production and trade association) has launched the 'Indian Palm Oil Sustainability' framework, IPOS. Reportedly, the initiative is backed by the Indian Government and enjoys the support of the Indian Institute of Oil Palm Research (IIOPR). The project's objective is to stimulate domestic production of and trade in sustainable palm oil. Developed in consultation with key stakeholders across the country, the IPOS framework consists of a set of environmental and social standards applicable to Indian conditions. IPOS will be tasked to: (i) promote the adoption of sustainable practices across the supply chain; (ii) assist stakeholders in achieving compliance with applicable national/international regulations and voluntary codes; and (iii) foster harmonization with other related initiatives in Asia. The programme will be governed by a multi-stakeholder national platform.
24	INDUSTRY STANDARDS – <i>Sustainable oil palm</i>	September	India, global	Responsible sourcing commitments: The <i>WWF</i> released a report that highlights the critical role Indian companies could play in promoting sustainable production practices in oil palm growing countries. India is the world's largest consumer of palm oil, with virtually all of it imported from Southeast Asia. While awareness levels on sustainability issues is rising, the Indian industry's uptake of certified sustainable palm oil remains limited, according to <i>WWF</i> 's report. The organization recommends a set of approaches to promote responsible sourcing, drawing on constructive industry engagement. Proposed solutions include: (i) systematic screening of palm oil suppliers; (ii) fostering industry collaboration through an industry forum across the value chain; (iii) tariff-based policy measures; (iv) promoting sustainability frameworks such as RSPO; and (v) calling for deforestation-free portfolios by lending institutions.
25	INDUSTRY STANDARDS – <i>Sustainable oil palm</i>	September	Indonesia	Responsible production pledge: According to media reports, a large oil palm company stated that it would endeavor to rehabilitate peatland it recently developed in Indonesia to plant oil palm. The extent of the area concerned was not disclosed. So far, the firm permanently discontinued land development work in the concerned concessions and amended its corporate sustainability policy by banning all peatland development irrespective of when the lands were acquired. Social society groups welcomed the initiative and encouraged the company to draw up and implement a time-bound action plan to deliver on its commitment. (See also <i>MPPU Feb. '16 on public peatland restoration efforts in Indonesia</i> .)

No.	Domain	Month	Country	Description *
26	INDUSTRY STANDARDS – <i>Sustainable oil palm</i>	September	Malaysia, Singapore, global	Monitoring responsible sourcing commitments: While many palm oil buyers are aware of the importance of using sustainably produced palm oil, only a few businesses are engaged in helping to reduce deforestation and other adverse practices found in oil palm, claimed the <i>World Wildlife Fund (WWF)</i> . According to a survey of palm oil-buying food and restaurant chains conducted by WWF in Malaysia and Singapore, the majority of surveyed companies were not transparent about their palm oil use, and several businesses had taken no action to support the use of sustainable palm oil – such as buying produce certified by RSPO (the Roundtable on Sustainable Palm Oil). At the same time, a number of companies went beyond the RSPO criteria, committing to eliminate the destruction of any kind of forest from their supply chains. Reportedly, companies cited the cost of sourcing certified palm oil as well as a lack of consumer awareness and demand for certified produce as reasons for not buying certified palm oil. WWF also reported that non-disclosure and lack of action seems to be higher at the regional level than among global brands. WWF is conducting buyers' surveys since 2009, with the objective of encouraging companies to move gradually towards more responsible sourcing practices (see <i>MPPU Dec. '09</i>).
27	INDUSTRY STANDARDS – <i>Sustainable oil palm</i>	September	Global	Responsible sourcing commitments: According to the latest sustainability report published by food and drinks company <i>PepsiCo</i> , the global business firm doubled the volume of its palm oil that is sustainably sourced, from 8 percent in 2015 to 16 percent last year – which, however, compares to a target of delivering 100 percent sustainably sourced palm oil by 2020. The company also conceded that none of its responsibly sourced raw materials have been verified as sustainable by a third party – despite the company's target of securing 100 per cent third-party verification by 2020.
28	INDUSTRY STANDARDS – <i>Sustainable oil palm</i>	November	Global	Comparing certification schemes: Civil society group Forest Peoples Programme published a study comparing the world's principal palm oil sustainability standards based on a detailed assessment of their environmental and social requirements. In addition to highlighting areas of commonality and difference, the report draws attention to alleged gaps in each standard.
29	INDUSTRY STANDARDS – <i>Sustainable oil palm</i>	November	Global	Responsible sourcing commitments: Further to its commitment to exclusively purchase palm and palmkernel oil certified by the Roundtable on Sustainable Palm Oil (RSPO), German oleochemical company <i>BASF</i> recently joined the Forum for Sustainable Palm Oil (FONAP), whose principal goal is to raise the proportion of certified products in the German, Austrian and Swiss market.
30	INDUSTRY STANDARDS – <i>Sustainable oil palm</i>	November	Global	Certification assistance: In addition to its pledge to buy only certified palm and palmkernel oil, German chemical and consumer goods company <i>Henkel</i> partnered with international NGO <i>Solidaridad</i> to promote sustainable palm oil production among smallholder farmers in Colombia. Under the joint initiative, small producers receive training on methods to improve productivity, reduce environmental impact and move towards certification.
31	INDUSTRY STANDARDS – <i>Sustainable oil palm</i>	December	North America	Responsible sourcing initiative: The Roundtable on Sustainable Palm Oil (RSPO) announced the formation of the North American Palm Oil Network (NASPON). Reportedly, in an effort to accelerate collaboration within the market, NASPON's mission will be to educate and assist North American companies in making and delivering on commitments to source sustainably produced palm oil. The newly formed coalition comprises industry associations, civil society groups, consumer goods manufacturers, food-service retailers and palm oil traders.

No.	Domain	Month	Country	Description *
32	INDUSTRY STANDARDS – <i>Sustainable oil palm</i>	December	Global	Certification – impact on production practices: A group of U.S. researchers reported on efforts to measure the actual effect of sustainability certification on deforestation and fire within oil palm plantations in Indonesia. The analysis of data of RSPO-certified and non-certified oil palm plantations for the 2001–2015 period suggests that certification significantly reduced deforestation among participating plantations, but not fire occurrence or clearance of carbon-rich peatland. Moreover, it emerged that certification was mostly adopted in older plantations that comprised little remaining forest and, consequently, the actual area conserved appears to be rather small. The study concludes that certification schemes have the potential to contribute to the protection of endangered tropical forests. However, broader adoption of certification by oil palm growers – targeting especially oil palm companies that develop forest frontiers as opposed to those working with well-established plantations – is likely needed for palm oil certification to result in meaningful protection of total forest area, the study says.
33	INDUSTRY STANDARDS – <i>Sustainable soy</i>	January	Brazil, European Union	Responsible supply chain: Backed by a civil society group that promotes sustainable trade initiatives, four associations representing Brazilian soybean producers and European soy buyers have signed a memorandum of understanding in support of responsible soy production in Brazil and its market acceptance in Europe. Reportedly, the initiative will support the Brazilian Forest Code's objective of preserving natural habitats by promoting sustainable production practices on soy farms whilst safeguarding community rights in rural areas. All five parties explicitly recognized the complementarity of existing responsible soy initiatives in Europe and Brazil.
34	INDUSTRY STANDARDS – <i>Sustainable soy</i>	May	Brazil	Soybean moratorium: According to a study jointly conducted by researchers in Brazil and the United States, Brazil's voluntary moratorium – which banned the purchasing and financing of soybeans produced on illegally cleared land in the Amazon biome – has been more effective than previously considered. Reportedly, forest cover loss declined sharply after the measure's introduction in 2006. Reportedly, deforestation is still ongoing, but it has slowed down considerably, and less of the deforested land is being used for soybean production. Extended regularly since its introduction, the moratorium was renewed indefinitely in May 2016 (see <i>MPPU June'16</i>). The initiative is supported by a multi-stakeholder coalition that brings together the private sector, environmental NGOs groups and the Brazilian government.
35	INDUSTRY STANDARDS – <i>Sustainable soy</i>	May	Brazil, European Union	Responsible supply chain: A group of Brazilian and EU industry associations joined forces to support the production (in Brazil) and market acceptance (in the EU) of “responsible soy”, i.e. soybean produced in accordance with specific environmental, social and financial principles and criteria. The group's objectives include involving European soy users in the development of tools that allow compensating Brazilian producers for their environmental services.
36	INDUSTRY STANDARDS – <i>Sustainable soy</i>	December	Brazil	Responsible production practices: According to the Brazilian oilseed industry association, ABIOVE, growing soybean cultivation has not been a significant driver behind deforestation in the Amazon basin. The finding is based on recently released Government material providing satellite imagery of soybean production in the Amazon biome. Allegedly, during the last decade, soybean farming only accounted for 1.2 percent of total deforestation in the area – a circumstance that is linked to the launch of the Brazilian Soy Moratorium in 2006 and to improvements in public environmental governance. Reportedly, although the area planted with soy continued to rise strongly, the expansion occurred primarily on former pastureland and areas cleared prior to the introduction of strict deforestation limits. The Brazilian Soy Moratorium bans the trading and financing of soybeans grown on land illegally cleared in the Amazon region. The voluntary initiative is supported by a multi-stakeholder coalition bringing together the private sector, NGOs and the government.

No.	Domain	Month	Country	Description *
37	INDUSTRY STANDARDS – Sustainable coconut	July	Philippines, Indonesia	Certified sustainable coconut: Backed by the Government of Germany, the German Agency for International Cooperation (GIZ) joined forces with private consumer good firm P&G, chemical company BASF and agri-trade firm Cargill to enhance the production of coconut oil in the Philippines and Indonesia. The initiative is aimed at establishing certified sustainable coconut supply chains in the regions of Southern Mindanao and Southern Leyte (Philippines), and Amurang and North Sulawesi (Indonesia). Working with smallholder farmers, the project will focus on good agricultural practices, intercropping, enhanced farm management skills, and the creation of cooperatives. Selected farmers will also receive training on the Sustainable Agricultural Network (SAN) standards, with a view to facilitate application for Rainforest Alliance certification. While GIZ would focus on the provision of technical assistance, Cargill will be in charge of production, while P&G and BASF would secure access to the personal care, nutrition and health products market.
38	INDUSTRY STANDARDS – Sustainable fishoil/meal	January	Global	Fishoil/meal – international production standards: IFFO, the organization that represents and promotes the fishmeal, fishoil and wider marine ingredients industry worldwide, has launched a two-month public consultation on its revised Responsible Supply standard for fishery and factory assessments. The purpose of the revision is to promote more responsible fishery management and further reduce the environmental and social impact of the fishmeal and fishoil manufacturing process.
39	INDUSTRY STANDARDS – Sustainable fishoil/meal	July	Global	Certified responsible fishoil/meal: The Marine Ingredients Organisation (IFFO), which represents the global fishmeal, fish oil and marine ingredients industry, revised its global standard for responsible supply of marine raw materials to maintain its relevance, credibility and accessibility to all current and prospective producers. Launched in 2009, the standard is implemented via a voluntary business-to-business certification programme aimed at guaranteeing that marine raw materials used for feed, food and nutraceutical purposes are responsibly sourced and manufactured.
40	INDUSTRY STANDARDS – Food products	May	China	Groundnut oil authentication: Chinese researchers presented a new analytical method for detecting fraud in groundnut oil. Based on low-field nuclear magnetic resonance and chemometrics, the new technique is said to eliminate the sample pre-treatment step, thus allowing to detect adulteration of groundnut oil with other vegetable oils in a single 5-minute analysis. Groundnut oil is a major edible oil in China, along with soybean and rapeseed oil. Being more expensive than the other two oils, it is prone to adulteration by unscrupulous dealers.
41	INDUSTRY STANDARDS – Food products	May	Vanuatu, New Zealand	Certified organic coconut oil: A coconut oil producer and exporter of Vanuatu has achieved certified organic status with certifying company BioGro in New Zealand. Reportedly, the BioGro certification label is widely recognized in New Zealand – Vanuatu's top export market – as well as elsewhere in the region.
42	INDUSTRY STANDARDS – Food products	June	Tunisia, Japan	Olive oil – provenance branding: According to a team of Japanese and Tunisian researchers (supported by Japan's Science and Technology Research Partnership for Sustainable Development, SATREPS), oils produced from Tunisian olive varieties are exceptionally rich in natural anti-oxidants and anti-allergens, potentially implying a superior health profile. Reportedly, the Japan International Cooperation Agency (JICA) currently endeavours to provide the necessary conditions to launch a Tunisian olive oil label in Japan.
43	INDUSTRY STANDARDS – Food products	August	European Union	Olive oil authentication: 'Oleum', a four-year project supported by the European Union's Horizon 2020 Research and Innovation Programme, entered its second year of implementation. The initiative is aimed at better guaranteeing olive oil quality and authenticity by empowering detection and fostering prevention of olive oil fraud. Reportedly, the consortium of 20 international partners has identified knowledge gaps in four areas that the project will address: legislation and regulation; analysis; harmonization and coordination; and consumer and market confidence.

No.	Domain	Month	Country	Description *
44	INDUSTRY STANDARDS – <i>Food products</i>	September	Australia	Olive oil – provenance branding: Australia's olive oil industry is exploring a provenance-branding initiative to better market the country's diverse extra virgin olive oils. Currently, Australia's olive oil market is dominated by high-volume blended oils imported from Europe. Reportedly, 85 percent of Australia's extra virgin oil olive production come from olives grown in single groves. Considering that location can impact an oil's flavour and chemical profile, the new initiative is aimed at setting up an appellation system, which would (i) enable consumers to associate an oil with a specific region and grower, and (ii) allow producers to achieve better prices.
45	INDUSTRY STANDARDS – <i>Food products</i>	December	Spain	Palm oil – origin identification: In Spain, a group of scientists claims to have developed a quick and accurate method to identify the geographical origin of palm oil – which, according to the group, could help governments and industry to detect oils fraudulently labelled as 'certified sustainable'. Reportedly, the newly developed method combines liquid chromatography with chemometric and data-fusion strategies.
46	GMO ISSUES	May	Australia, China	GM cottonseed – regulatory approval: According to industry circles, the absence of regulatory approval for GM cottonseed variety 'Bollgard3' in China is threatening Australia's cottonseed exporting sector. Reportedly, when the new variety was launched in Australia last year, the patent owner misapprehended the regulatory situation in China.
47	GMO ISSUES	May	Brazil	Non-GM soy: Increased production of conventional soybean has been reported from the state of Mato Grosso in Brazil. While, in the country as whole, GM varieties account for approximately 96 percent of output, a niche market has emerged for non-GM soy in Brazil's leading soybean-producing state. Reportedly, the new trend is driven by premia paid for conventional varieties, as demand for GM-free product is on the rise (and cannot be satisfied fully) in Europe and Asia. At present, the premium – which is needed to compensate farmers and traders for additional costs borne to prevent non-GM soybeans from being contaminated with GM material – is said to range around BRL 12 per 60 kilograms sack (or USD 61 per tonne). Encouraged by such premium, farmers could plant more non-GM soy in 2017/18, provided they manage to source sufficient quantities of seed. Currently, conventional soybeans account for roughly 14 percent of Mato Grosso's total soy output. Reportedly, the reason for non-GM production being concentrated in Mato Grosso is that the state enjoys access to recently opened ports on the Amazon River that are specifically equipped to handle GM and non-GM material separately.
48	GMO ISSUES	July	European Union	Non-GM soy: Global agri-trade company ADM expanded its capacity to crush non-GM soybeans in Germany. Reportedly, the move is meant to help the company meet rising customer demand as the European non-GM soybean market continues to expand and reflects ADM's strategy to support farmers in their efforts to raise local soybean production (see also related item under 'Sector development measures' above).
49	GMO ISSUES	August	Brazil	Non-GM soy: An alliance for the promotion of conventional, non-GM soybeans – named Soybean-Free Institute – has been launched in the state of Mato Grosso, where most of the country's non-GM soy production for niche markets in Europe and Asia is located (see also MPPU June '17). Members of the newly created institute include growers, seed producers, suppliers of chemical inputs, food manufacturers, traders and civil society groups.

No.	Domain	Month	Country	Description *
50	GMO ISSUES	September	United States	GMO labelling: The U.S. Grocery Manufacturers Association (GMA) responded to USDA's call for public comments on the GMO labelling legislation that was signed into law last year (see <i>MPPU Aug. '16</i>). The association recommended that the new law be also applied to highly refined oils and sweeteners derived from GM-crops – even if GM material is not always detectable via analytical tests in refined products. According to GMA, given that the bulk of US maize, soy and sugarbeet crops are genetically modified, the named ingredients should be routinely labelled. Asserting that the new labelling requirements should be considered as a marketing standard rather than a food safety standard, GMA explained that its recommendation stemmed from the industry's commitment to transparency. Furthermore, GMA invited USDA to apply the presumption that any food derived from crops that are overwhelmingly bioengineered in the country where they are grown is a GM food – unless a manufacturer can prove otherwise. Such measures would greatly simplify compliance with the new standard, the association said.
51	GMO ISSUES	November	United States	GM soy – regulatory issues: Seed company <i>Dow AgroSciences</i> announced the commercial launch, in the United States, of new GM soybean variety 'Enlist E3'. The variety has yet to be approved in major importing countries, notably the EU and China. Reportedly, production and marketing of the new variety will be subject to strict controls to avoid that seeds accidentally enter the export pipeline. Farmers planting the new variety will be required to agree to deliver their crop to specific facilities at set times.
52	BIOFUEL/BIOENERGY	March	Brazil	Biodiesel feedstock – used oils/fats: ABIOVE, the association of Brazilian vegetable oil industries, reported that its members are managing nearly 1 300 collection points for used cooking oils across the state of São Paulo. Launched by ABIOVE in December 2015, the programme is implemented in collaboration with a number of state agencies. Under the scheme, used edible oils are collected and subsequently channelled for recycling to the oleochemical and biodiesel industry. In 2016, a total of 1 162 million liters of waste oil have been collected.
53	BIOFUEL/BIOENERGY	May	Brazil	Research & Development – biodiesel purity: Brazilian scientists developed a new method for verifying the purity and quality of biodiesel. The detection of raw vegetable oils in biodiesel – as opposed to refined, trans-esterified oil – is said to be crucial as the presence of such oils lowers the quality of the fuel, increases pollution and can cause damage to engines. The newly developed detection method uses nuclear magnetic resonance spectroscopy.
54	BIOFUEL/BIOENERGY	May	Egypt	Biodiesel feedstock – jatropha oil: According to media reports, the National Research Centre of Egypt developed a jatropha oil-based fuel suitable for airplanes. The project included refining jatropha oil to make it resist freezing until at least – 45° degrees Celsius. Reportedly, the oils freezing point has been lowered through a thermal cracking process, plus the introduction of chemical additives.
55	BIOFUEL/BIOENERGY	May	Italy	Biodiesel feedstock – used oils/fats: Italy's National Consortium for the Collection and Treatment of Used Oils and Fats (CONOE) signed a Memorandum of Understanding to supply used vegetable oils and fats to multinational oil/gas company <i>ENI</i> . The company, which has experience in producing renewable diesel, jet fuel and liquefied petroleum gas from palm oil, plans to process approximately 1 million tonnes of used oils/fats annually, starting in 2018. Reportedly, the new partnership also includes joint activities to promote the collection of used oil/fat at the household level, where the product habitually goes to waste. <i>ENI</i> expects to achieve significant reductions in carbon emissions and fresh water consumption by switching to used oils/fats.
56	BIOFUEL/BIOENERGY	May	Singapore	Biodiesel feedstock – used oils/fats: Air carrier <i>Singapore Airlines</i> , in partnership with Singapore's Civil Aviation Authority, started operating a series of biofuel-powered intercontinental flights. The flights will be powered by a blend of conventional jet fuel, hydro-processed esters and fatty acids produced from used cooking oil. The project is geared towards reducing the carrier's carbon emissions.

No.	Domain	Month	Country	Description *
57	BIOFUEL/BIOENERGY	June	China	Biodiesel feedstock – used oils/fats: A subsidiary of China's state-owned oil company Sinopec is planning to set up a used cooking oil (UCO) biofuel plant in Eastern China. The plant would convert 100 000 tonnes of UCO into 30 000 tonnes of aviation-grade biofuel a year. Reportedly, the fuel would be sold to airlines operating long-haul international flights, especially to countries that charge high emission taxes.
58	BIOFUEL/BIOENERGY	August	Indonesia, Japan	Biodiesel feedstock – palmkernel shell: Indonesia's oil palm industry is looking into the possibility of expanding sales of palmkernel shell to Japan. Reportedly, underpinned by Government policies calling for a higher renewable energy portion in the country's energy mix, Japan's import demand for palmkernel shell is growing as biomass power plants use the product as bioenergy feedstock.
59	BIOFUEL/BIOENERGY	August	Philippines	Biodiesel feedstock – national legislation: In the Philippines, the national federation of industries urged the Government to review the product specification in the country's Biofuels Act with a view to include palm oil as a biodiesel feedstock in addition to coconut oil. The private sector views palm oil as an economical alternative to coconut oil. Reportedly, chronic shortages in domestic coconut oil supplies relative to demand have driven up coconut oil prices – hampering growth in biodiesel production and preempting the planned introduction of higher blending mandates (see <i>MPPU Oct.'15 & Aug.'17</i>). Low-priced palm oil, by contrast, is said to be widely available, and permission to use that oil as biodiesel feedstock would allow to channel more coconut oil towards the production of high-value added products for export.
60	BIOFUEL/BIOENERGY	November	Australia, Canada, United States	Aviation fuel feedstock – carinata oil: Australia's national air carrier and a Canadian seed company have joined forces to launch <i>brassica carinata</i> cultivation for aviation fuel production in Australia. Carinata is a non-food, industrial-type oilseed suitable for producing renewable diesel, especially aviation jet fuel (see also <i>MPPU Dec.'12, Dec.'13 & June.'17</i>). The target is to grow carinata seed on 400 000 hectares of land, ultimately producing about 180 000 tonnes of biojet fuel per year. Carinata crushing is also expected to yield a high-protein non-GM oilmeal for Australia's expanding livestock market. A separate research project has been launched in the United States to explore carinata cultivation opportunities in the country's Southeast. Industry experts reckon that demand for carinata could expand rapidly, against the backdrop of global airline carbon reduction commitments and limited supplies of other feedstock such as animal fat and waste oil.
61	BIOFUEL/BIOENERGY	November	Brazil	Research & Development – soy-based ethanol: A Brazilian company informed that it will be ready to produce hydrous ethanol from soybeans in two years' time. The company plans to sell the product as transportation fuel and as raw material for a variety of industrial applications.
62	BIOFUEL/BIOENERGY	November	China	Aviation fuel/biodiesel feedstock – used oils/fats: China has operated its first cross-ocean passenger flight powered by jet fuel containing 15 percent of renewable diesel produced from waste cooking oil (see also <i>MPPU Mar.'14 & July'17</i>). Sinopec, the state-owned oil refining company producing the biofuel, pointed out that securing sufficient, stable supplies of used cooking oil on the domestic market may pose challenges. Furthermore, according to industry experts, tax exemptions and state subsidies will be needed to support the development of the country's aviation-grade biofuel sector. Sinopec also started selling road transportation diesel made from used cooking oil. Reportedly, the fuel is being sold at selected gas stations at a price of CNY 5.72 per liter (USD 0.87), which compares to CNY 6.02 (USD 0.91) charged for regular diesel.
63	BIOFUEL/BIOENERGY	December	India	Research and Development – enzyme-assisted biodiesel production: An Indian company embarked on biodiesel production from low-grade waste feedstock using a newly developed, enzyme-based technique. As feedstock, the company intends to use waste oils with a high content of free fatty acid, including brown grease, used cooking oil and palm fatty acid.

No.	Domain	Month	Country	Description *
64	OVERSEAS INVESTMENT & TRADE PROMOTION	September	China, Brazil	Overseas acquisitions: A privately owned Chinese company announced plans to acquire more agribusiness firms in Brazil, after it completed the acquisition of two such firms last year. Reportedly, last year's takeovers allowed the Chinese company to secure a combined seven-million-tonnes output of Brazilian soybean and maize, a figure the company intends to raise to 10 million in 2018 and, possibly, 30 million in the following years. In parallel with comparable acquisitions made by Chinese state-owned firms in recent years (see <i>MPPU Nov. '14 & Feb '16</i>), these investments are aimed at raising the country's presence in international grain and oilseeds markets at a time when China's dependence on imports to meet domestic demand has climbed to unprecedented levels.
65	OVERSEAS INVESTMENT & TRADE PROMOTION	November	China, Brazil	Overseas operations: China's state-owned grain trading group <i>COFCO International</i> , plans to raise the volume of soybeans it sources from Brazil's Mato Grosso state from currently 4 million tonnes to 7.2 million tonnes over the next five years. Furthermore, a group of Chinese investors held talks with Brazilian companies about financing the construction of 30 grain storage facilities in Mato Grosso. At the global level, by the year 2022, <i>COFCO International</i> intends to double the amount of agricultural commodities it buys directly from farmers, thus reducing its reliance on traditional global trading houses.
66	OVERSEAS INVESTMENT & TRADE PROMOTION	November	Tunisia	Trade promotion: Tunisia's olive oil industry has launched a programme to promote sales of packaged extra virgin olive oil to the Japanese market. The target is to meet five percent of the Asian nation's import demand (compared to less than one percent at present).
67	TRANSPORT INFRASTRUCTURE	March	Argentina	Private sector investment: According to private industry estimates, Argentina's grains and oilseeds transportation sector will receive ARS 27 billion (USD 1.76 billion) in private investments for the 2016-17 period. Aimed at making the country's transports logistics and processing operations more efficient, the investments will concern port facilities, road and rail networks, truck terminals, warehouses and processing plants.
68	TRANSPORT INFRASTRUCTURE	December	Brazil	Private sector investment: A global agri-trade company has filed environmental impact studies with the authorities of the state of Pará concerning the construction of a new river port facility. Located in the Barcarena region, the project would complement recent public and private efforts to develop the country's northern export corridors, or 'Arco Norte' (see <i>MPPU July & Sep. '17</i>). The new facility would receive barges loaded in the upriver transshipment terminal of Miritituba, carrying grains coming primarily from Mato Grosso state. The port's annual handling capacity would amount to 6 million tonnes of grains.
69	MARKETS & FINANCE	January	European Union	Futures markets: The pan-European exchange <i>Euronext</i> temporarily suspended its rapeseed futures and options to review, together with industry players, the contracts' technical specifications – in particular the oil content basis for rapeseed.
70	MARKETS & FINANCE	January	India	Futures markets: After receiving approval from the Securities and Exchange Board of India (SEBI), the <i>National Commodity & Derivatives Exchange (NCDEX)</i> and the <i>Multicommodity Exchange (MCX)</i> informed that they intend to launch a futures contract in castor seed to cater to the need of the castor industry for price discovery and risk management instruments.
71	MARKETS & FINANCE	March	China	Futures markets: Following approval by China's securities regulator, the <i>Dalian Commodity Exchange (DCE)</i> has launched a soybean options contracts on 31 March 2017 (see also <i>MPPU Jan. '17</i>). Option contracts grant the right but not the obligations to buy a financial contract in the future. <i>DCE's</i> initiative is meant to help the process of price discovery and to provide agricultural companies with more flexible risk management tools.

No.	Domain	Month	Country	Description *
72	MARKETS & FINANCE	May	China	Futures markets: China's <i>Dalian Futures Exchange (DCE)</i> plans to change the contract rules for its soybean futures in a bid to help investors hedge the risk in soybean import and provide a domestic pricing benchmark for soybean. Details of the envisaged changes are still to be provided.
73	MARKETS & FINANCE	May	European Union	Futures markets: The pan-European exchange <i>Euronext</i> has launched rapeseed options contracts for delivery in 2019, without changing their specifications. The contracts had been suspended earlier this year to review their technical terms (see <i>MPPU Feb '17</i>). Reportedly, market participants could not agree on potential changes to the oil content basis specified in the contract.
74	MARKETS & FINANCE	May	India	Futures markets: India's <i>National Commodity and Derivatives Exchange (NCDEX)</i> announced the launch of a futures contract for mustardseed cake. As the market of the animal feed is subject to considerable price volatility, the new futures contract is aimed to allow producers and traders to hedge their risk.
75	MARKETS & FINANCE	November	United States	Futures markets: <i>CME Group (Chicago Mercantile Exchange)</i> informed that, on 31 October 2017, the maximum daily price change permitted on soybean contracts at <i>CBOT (Chicago Board of Trade)</i> was raised from 65 US cents per bushel to 70 US cents, while the limit for soybean meal was lowered from USD 25 per tonne to USD 20 per tonne. The new limits will remain in effect until May 2018.
76	R&D – pest control	January	European Union	Impact of pesticide ban: A research consultancy reviewed, with support from the private sector, the impact of the EU's decision (see <i>MPPU June '13</i>) to temporarily ban neonicotinoid-based pesticides – a group of pesticides used primarily on rapeseed. According to the consultancy firm, the ban has led to significant yield reductions, crop quality losses and increased insecticide applications in EU rapeseed cultivation. Allegedly, the ban also caused a shift of production outside the EU, triggering the conversion of grassland and other biodiversity-rich natural habitats to arable land. The study concludes that holistic impact assessments – looking at all economic and environmental effects – ought to be conducted before pesticide restrictions are implemented.
77	R&D – pest control	March	Australia	Rapeseed – blackleg resistance: Reportedly, Australian scientists found new rapeseed genes for resistance to 'blackleg', a major pest threat to rapeseed cultivation in Australia and elsewhere. The mapping of genes for resistance via molecular markers is said to help develop varieties with lasting resistance to the disease. The research project benefitted from public funding.
78	R&D – varietal research	March	United States	Rapeseed – varietal research: In the United States, USDA's National Institute of Food and Agriculture (NIFA) announced the availability of up to USD 0.77 million for fundamental and applied research to help develop new rapeseed varieties, expand the crop's growing region, and launch new commercial rapeseed-based products. Applications must include both research and extension services.
79	R&D – varietal research	May	Indonesia	High-yielding oil palm: An Indonesian oil palm firm reported that it developed a new variety of oil palm capable to increase palm oil yields by up to double the current levels. Allegedly, the new material, which has been developed using traditional plant breeding methods, yields 11–13 tonnes of crude palm oil per ha per year during the palm's prime age (10–18 years), with oil extraction levels ranging 32–36 percent. Reportedly, this compares to a current capacity of 7.5–8 tonnes per ha under optimal conditions and a countrywide average level of less than 4 tonnes. Seedlings also reach maturity faster – supposedly after 24 months as opposed to the current industry average of 30 months. Reportedly, the new clones have been registered in Indonesia's Catalogue of Seeds and could be available at large-scale within five years. Stagnating yield levels represent a major concern in the palm oil industry worldwide (and in Southeast Asia in particular) – especially in recent years, as growth via area expansion started to face environmental and social challenges.

No.	Domain	Month	Country	Description *
80	R&D – varietal research	May	Global	Sunflowerseed genome: Reportedly, an international team of scientists published the first sunflower genome sequence. Access to the genome is expected to assist future research programmes using genetic tools to improve the plant's crop resilience and oil production.
81	R&D – varietal research	June	India	High-oleic safflower seed: The Indian Institute of Oilseeds Research developed – using traditional breeding methods – three high-oleic safflower lines suitable for cultivation under Indian conditions. Reportedly, the new lines contain up to 75 percent of oleic fatty acid – as opposed to between 16–20 percent in conventional varieties. High-oleic oils are sought by food manufacturers, retailers and consumers alike, thanks to their suitability for deep-frying and various oleochemical uses, their extended shelf-life, and their wholesome health profile of the respective oils. Given that the research benefited from private sector funding, two of the new varieties have been licensed – for the first three years – to a private firm that already started large-scale commercial production.
82	R&D – varietal research	July	Indonesia	Improved coconut palm: The Indonesian Palmar Research Institute is preparing the commercial release of two new coconut varieties known under the names 'Lampanah' and 'Bido'. Developed in collaboration with the provincial agricultural offices of Aceh and North Maluku, the former variety is characterized by superior fruit bearing, while the latter stands out for early maturity and slow stem growth, according to the agency.
83	R&D – varietal research	September	Ghana	Aflatoxin-resistant groundnut: Ghana's Crop Research Institute has released a new aflatoxin-resistant groundnut variety – an achievement that could lead to a revival of Ghana's groundnut exports, according to the institute's scientists. In general, high levels of aflatoxin contamination constitute a major challenge for groundnut producers across Africa and Asia, as they bar their products from entering international markets.
84	R&D – varietal research	December	United States	High-oleic/low-linoleic soybean: Using gene-editing technologies, a company in the United States is working on a new soybean variety characterized by both high oleic acid content and low linoleic acid content – a fatty acid profile that is known to increase an oil's shelf life and frying capability, without having to be hydrogenated (i.e. avoiding the formation of harmful trans fats). Given that gene-editing techniques are not subject to regulation by USDA, the company expects the approval process for the new variety to be short and plans to begin commercial sales later this year.
85	R&D – product development	March	Australia	Soybean oil – industrial applications (non-food): In Australia, researchers developed a technology to produce graphene from soybean oil. Graphene consists of single layer carbon films with promising applications in the semiconductor, electronics, battery energy, and composites industries. Reportedly, the high cost of conventional graphene production represented the principle hurdle in the product's commercialization until now. By contrast, the new technology is said to be less complex, inexpensive and based on renewable feedstock. Allegedly, the new method allows to produce graphene from any type of used cooking oil. The research was conducted with public funding.
86	R&D – product development	May	Australia	Omega3 rapeseed – feed use: Australian seed company <i>Museed</i> is filing for regulatory approval of omega-3 bearing rapeseed in Australia, Canada and the United States and expects commercialization to commence in 2018 or 2019. Reportedly, the new product provides long-chain omega-3 oils similar to those found in fish oil. Commercial applications are planned in both aquaculture feed uses and human nutrition (see also <i>MPPU Dec. '16</i>).
87	R&D – product development	May	Canada	Rapeseed meal – feed use: Research conducted in Canada suggests that pork producers can reduce feed costs by including rapeseed meal at higher than traditional levels in the rations of lactating sows (see also <i>MPPU Aug. '15 & Mar. '16</i>).

No.	Domain	Month	Country	Description *
88	R&D – product development	May	Canada, United States	Carinata meal – feed use: A Canadian company gained approval from the US Food and Drug Administration to commercialize carinata meal as a non-GM protein meal for beef cattle feed in the United States. Carinata meal, which is said to match rapeseed meal specifications, is obtained as a by-product when <i>brassica carinata</i> is crushed for oil (see also <i>MPPU Dec. '13</i>). Carinata meal has previously been approved in Canada and the European Union. Reportedly, regions targeted for carinata cultivation include South America (where the plant can be grown as a second crop following soybeans) and North America, notably the southeastern United States and the northern Plains, which includes the southern Canadian Prairies. The crop is already cultivated in Europe, where the oil is used as biodiesel feedstock.
89	R&D – product development	May	Global	High-oleic groundnut: Snack food producer <i>Mars</i> informed it was moving towards using exclusively high-oleic groundnuts in some of its products. High-oleic groundnuts are valued for their health profile, notably their high content of unsaturated fats. Furthermore, high-oleic oils enjoy a high oxidative stability and don't need to be hydrogenated, hence preventing the formation of trans fatty acids. The company reported that its shift to high-oleic groundnuts has been slowed down by insufficient product availability.
90	R&D – product development	June	United States	Rapeseed meal – feed use: In the United States, a group of researchers reported the successful conversion of rapeseed meal into a high-protein feed additive. Allegedly, the research project determined the optimal fungal culture to reduce undesirable glucosinolates, fiber and residual sugars, while raising the protein content and nutritional value of the meal. The conversion process takes place under solid-state fungal incubation conditions.
91	R&D – product development	September	Global	Soybean oil – industrial applications (non-food): Global rubber and tire company <i>Goodyear</i> has developed a technology that allows substituting soybean oil for petroleum-based oils in the production of rubber compounds for tires. The company regards soybean oil as a naturally derived, cost-effective, carbon-neutral and renewable raw material. Reportedly, the incorporation of soybean oil allows to enhance the performance of tires, raise manufacturing efficiency, and reduce energy consumption. The new technology has been developed with support from the U.S. United Soybean Board (a federal programme that collects funds from soybean growers and channels them into promotion and research activities of general interest).
92	R&D – product development	November	Denmark	Soy – industrial applications (food): A Danish food ingredient manufacturer has launched a soy-based emulsifier for use in industrial bakery products. Reportedly, the product was developed to offer an alternative to traditional, widely used lauric oil-based emulsifiers.
93	R&D – product development	November	France	Olive oil – waste water recycling: A group of French scientists presented a technology that allows converting waste water from olive oil production – normally classified as a pollutant – into biofuel, biofertilizer and safe water for use in agricultural irrigation.
94	R&D – product development	November	Holland	Sheanut – industrial applications (food): A Dutch oils and fats producer developed a shea-based, non-hydrogenated fat for use in industrial bakery products. Allegedly, the new product contains 40 percent less saturated fat than comparable lauric oil-based products.
95	R&D – product development	November	United States	Vegetable oils – refining processes: In the United States, a group of researchers has developed a new family of naturally derived vegetable oil structuring agents. The carbohydrate derivatives dubbed 'gelators' allow to solidify/thicken a variety of vegetable oils, thus offering an alternative to partial hydrogenation – a technology deemed hazardous to human health (see also <i>MPPU Nov. '16 & Jan. '17</i>).
96	R&D – product development	December	Canada	Food-grade rapeseed protein: Canadian researchers developed a membrane-based process to obtain food-grade protein from defatted rapeseed meal. Currently, due to its poor taste and the presence of antinutrients, rapeseed meal is exclusively used as animal feed, notwithstanding its high nutritional value.

No.	Domain	Month	Country	Description *
97	R&D – product development	December	Norway	Omega3 rapeseed – feed use: Early trials conducted in Norway with an omega3-rich oil derived from a GM rapeseed developed in Australia (see <i>MPPU Dec. '16 & June '17</i>) would indicate that the product is suitable for use as salmon feed. Results suggest that there is no difference between fish fed with traditional fish oil (– supplies of which are limited –) and fish fed with the modified plant oil. Pending regulatory approvals, commercialization of the new rapeseed variety in the United States, Canada and Australia could start in 2018 or 2019. Reportedly, seeds would be sold to growers under license, for segregated cultivation and processing.
98	R&D – product development	December	Global	High-oleic rapeseed oil: In accordance with global industry efforts to offer food ingredients perceived as more healthy, a multinational agri-business firm launched a new high-oleic rapeseed oil derived from hybrid seed (i.e. without genetic modification). According to the company, the new oil's saturated fat content is 35 percent below that of conventional rapeseed oil. Despite its low saturated fat content, the oil is said to offers strong frying performance, long shelf life and fresh taste. Furthermore, growers of the hybrid rapeseed are promised of their high yields and disease resistance quality.

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ISBN 978-92-5-130606-2



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