UKaid
from the Department for International Development

defra

中国食品土畜进出口商会

中国可持续棕榈油面临的挑战及前景展望

Prospects and Challenges of Sustainable Palm Oil for China

中国可持续棕榈油面临的挑战及前景展望

中国政府制定了2020年和谐社会的总体发展战略规划，该规划主要关注人类进步、社会文明和可持续发展，其目标是促使中国在全球经济中迅速崛起。在可持续发展领域，中国已经开始履行减缓气候变化和保护生物多样性等方面的承诺。作为棕榈油的主要进口国，以及海外棕榈油的潜在生产者，中国对该领域的可持续发展发挥着重要的作用。2004年以来，国际棕榈油行业及利益相关方多次举行会议，以解决大家高度关注的问题，即在不破坏森林或没有环境退化的情况下提高棕榈油的产量。

国际可持续棕榈油圆桌会议（RSPO）界定了棕榈油产业可持续发展的原则和标准，同时制定了针对整个棕榈油市场供应链的认证体系。此认证系统目前已经在全球范围内进行实施，它不仅受到生产商和生产国的大力支持，而且也引起了需求方，特别是来自欧洲和许多跨国公司等的高度关注。

近两年，中国的棕榈油平均进口量都达600万吨以上，棕榈油已成为中国第一大植物油进口品种，中国在国际棕榈油产业影响力不断增强。进口量增大对棕榈油主产国及全球环境、社会等多方面带来一定的影响，引起了国际有关各方的普遍关注，国际社会认为促进中国可持续棕榈油进口对未来全球可持续棕榈油生产和贸易具有重要意义。英方对此表示了极大的兴趣，希望与中方对这方面进行合作研究。在中英可持续发展对话(SDD)框架下，由英国环境、食品与乡村事务部(DEFRA)、英国国际发展部(DFID)提供赞助，中国商务部世贸司支持，“中国可持续棕榈油的发展前景与挑战”项目于2010年7月启动。项目由中国食品土畜进出口商会具体执行。为在中国推广可持续棕榈油提供政策建议。

这项研究的目标是：

（1）为中国政府提供可持续棕榈油发展的战略指导方针；

（2）促进中国政府采纳棕榈油可持续发展贸易政策；

（3）提供有关推广可持续棕榈油的商业案例。

可持续棕榈油圆桌会议认为，可持续棕榈油生产方式应该是由“合法性、经济可行性、环境合理性，以及社会利益的管理和运作”组成的。

棕榈油是由非洲油棕（几内亚油棕）果束加工生产出来的，是当今世界最主要的植物油，在生产、贸易及食品、工业和生物燃料等加工领域得到广泛应用。油棕种植在南纬10°至北纬10°的热带地区，棕榈油已经成为东南亚、巴布亚新几内亚、中非和西非部分地区以及热带南美洲地区农业经济发展的主要动力。与其他主要植物油相比，棕榈油产量增长显著，2010年，棕榈油产量（4,590万吨）占世界植物油总产量（13,970万吨）的33%。印度尼西亚和马来西亚棕榈油产量达到3,780万吨，占世界棕榈油生产总量的82%。

棕榈油也是全球最大的植物油贸易品种。2009年，印度尼西亚和马来西亚的棕榈油出口量约占贸易总额的90%。中国、印度和欧盟的棕榈油进口量连续多年位居全球前列，2009年印度、中国以及欧盟国家的棕榈油进口量分别为660、640和580万吨，占全球总进口量的53%。随着人口数量的增长、生活水平的提高以及生物燃料需求的增长，用于食品和非食品加工的棕榈油也将会大幅增加。预计到2015年全球棕榈油需求总量可达6300万吨，比2010年的产量高36%；到2020年可能达到7700万吨，主产国及其他潜在生产国的棕榈油生产对土地利用和环境都带来不利的影响。

2001年以来中国的棕榈油消费量持续增长，从150万吨增加至2009年的640万吨（年增长率约为10%）。中国进口的棕榈油主要来自印度尼西亚和马来西亚，2009年我国来自马来西亚的棕榈油进口量为392.4万吨，占总量的60.9%；自印度尼西亚的进口量为245.3万吨，占进口总量的38.1%。进口的棕榈油主要包括用于食品加工的精炼棕榈油（约占总进口量的70%），毛棕榈油（约占总进口量的9%）和棕榈硬脂（约占总进口量的21%）。中国进口的棕榈油大部分用来加工食品和工业产品以满足国内消费，只有很小一部分产品出口国外。预计中国棕榈油需求量将以每年10%的速度增加，到2015年和2020年将分别达到860万吨及1200万吨，增加量主要用于满足人口增长和人均消费量增加的食品消费。

自20世纪初以来，棕榈油开始进行大规模生产而且以其自身许多优点成为全球最主要的植物油，但是人们对这个行业的可持续性发展一直存在不少争议，特别是在过去的十年里相关争议更多。如果种植者按照国家相关法律，在生产和操作过程中将最佳管理措施落实到位的话，完全可以实现棕榈油的可持续生产。与其他油籽作物相比，油棕的单产最高，分别是大豆和油菜籽单产的10倍和5倍。

从社会经济角度来看，棕榈油生产国（如马来西亚和印度尼西亚）的棕榈油生产对创造就业机会、减少贫困及促进区域经济发展做出了巨大贡献。但是，其他利益相关者，特别是非政府组织对这种盲目扩张的不可持续的做法表示严重关切，他们认为这些做法可能导致现有热带雨林及其丰富的生物多样性遭到破坏。砍伐森林，特别是对生态脆弱地区如印度尼西亚泥炭地的森林砍伐，可能会导致大量温室气体排放。在过去几十年里，大规模扩张油棕种植面积，特别是在印度尼西亚，引发了种植公司、政府机构以及土著居民、地方社区、小农和部门工人之间大量的社会矛盾。印度尼西亚和其他国家（如巴西）政府都表示，未来棕榈油发展应该建立在可持续的基础之上。

棕榈油供应链的参与者必须共同努力，以解决来自可持续发展的挑战。主要动力源自2004年召开的可持续棕榈油圆桌会议制定的目标，即：通过在供应链中开发、实施和建立可靠的全球认证体系及利益相关者签署承诺，推动可持续棕榈油的生产、采购和使用。可持续棕榈油圆桌会议是一个多方利益相关

者组织，汇集了棕榈油供应链的关键参与者，即棕榈油生产者、加工者、贸易商、消费品制造商、零售商、银行和民间社会组织（例如：环境/自然非政府组织和社会/发展非政府组织）。可持续棕榈油圆桌会议取得了前所未有的进展，并已成为世界上最先进的圆桌会议平台，它致力于解决整个供应链中某商品作物的可持续性生产问题。在最初的两年内多方利益相关者制定了一个可持续棕榈油标准，接着确立了相关认证体系及贸易可追溯机制。

2008年8月26日，第一批由可持续棕榈油圆桌会议认证的棕榈油来自马来西亚的联合种植园；2008年11月500吨可持续棕榈油运抵鹿特丹港，成为可持续棕榈油生产的一个里程碑。随着越来越多的生产者获得认证，可持续棕榈油的产量不断增加。到2011年2月14日，获得认证的企业已达84家，可持续棕榈油的产量超过了361万吨，其中马来西亚是可持续棕榈油的最大生产者，产量为193万吨，占全球总产量的60%。印度尼西亚是第二大生产国，其产量占全球总产的33%，其余由巴布亚新几内亚和哥伦比亚生产。

目前可持续棕榈油产品的购买和消费主要以欧盟国家为主，2010年可持续棕榈油消费量为128万吨，占全球可持续棕榈油产量的56%。由于欧洲和美国的棕榈油加工和消费商已经承诺,到2015年只购买可持续棕榈油，所以可持续棕榈油的消费量预计将会进一步增加。这是作为一个环境非政府组织在过去几年里在可持续棕榈油的推广中所取得成果的一部分，在报告中作为简短个案曾被多次谈及。第一个制定100%使用认证可持续棕榈油目标的进口国是荷兰，该国的棕榈油消费公司已集体承诺到2015年将全部使用通过认证的可持续棕榈油。

经过认证的可持续棕榈油逐渐成为主流商品，这种需求必然会波及到其他主要消费国，尤其是中国和印度（两国进口量占全球棕榈油进口总量的37%）。只有当经过认证的全球可持续棕榈油需求所占比重在2013年达到20%，在2019年达到40%时，才会发生一个突破性转变，中国、印度和印度尼西亚正在成为经过认证的可持续棕榈油最重要的新兴市场。

在整个棕榈油市场供应链体系中，中国都存在可持续棕榈油的发展机遇，例如从油棕栽培、种植以及生产、毛棕榈油的准入条件，到可持续棕榈油相关产品的生产和使用，再到批发和零售等环节。在供应链各个环节推广认证可持续棕榈油受到收益率、风险以及国家和企业之间的共同利益影响。最终目标不在于是否要认证可持续棕榈油，而是何时能够实现可持续棕榈油的全部认证。有的中国公司有意直接投资油棕种植园，有的公司产品中含有棕榈油成分，对于这些大型贸易商和生产商来说，目前是生产和推广使用认证可持续棕榈油是一个重要机遇期。

可持续棕榈油的认证成本比较低，如果消费者也意识到可持续棕榈油认证的重要性，那么采购并使用认证的可持续棕榈油，对中国企业的盈利水平不会有太大影响。

在中国采购并使用认证的可持续棕榈油仍然可能存在一定的风险，例如，如果全球认证可持续棕榈油的最终需求超过供给，将会导致棕榈油价格进一步上涨；或者非认证棕榈油的生产商廉价销售，从而导致认证可持续棕榈油价格下降。但是，也必须认识到不采购认证可持续棕榈油所导致的风险，这些风险包括：对含有非认

证可持续棕榈油成分的产品（尤其是中国制造的）的抵制，或者对其他出口贸易活动的影响，以及可能导致今后中国投资者无法投资国外油棕种植园。

中国致力于改善环境和实现可持续发展，并承诺发展低碳经济、缓解气候变化和生物多样性保护等，国家与企业之间的共同利益在于这些承诺与建立绿色棕榈油供应链相一致。中国也正寻求更广泛的国际合作，比如与邻国——东盟国家以及非洲和拉丁美洲之间进行合作。中国已经朝着“绿色经济”这一目标前进，在贸易和可持续发展问题上取得了重大进展，并将在第12个五年计划加大环境保护力度。

对于中国棕榈油企业来说，未来五年将是取得可持续发展重大成效的关键时期，这将为棕榈油行业未来的稳定发展、粮食安全、经济繁荣以及全球环境的改善提供更好地保障。若要实现该目标，企业就需要提高自身的经济实力。中国企业及其协会可以率先引导建立国际公认的、高度自愿参与的可持续发展认证体系。参与建设认证体系所应承担的费用由企业的规模、发展水平以及企业所处的环境可持续发展阶段来决定。

基于中国国情，有多种有效提高认证可持续棕榈油使用量的方案。一些国内外企业、金融部门和利益相关者曾经承诺：在贸易、投资和棕榈油产品生产过程中采用认证的可持续棕榈油，中国政府需要与这些企业进行沟通，以增强其对采购并使用认证可持续棕榈油价值的认识。这样，将有助于中国加快认证可持续棕榈油供应链体系框架的建立。目前，作为贸易协会、公司和利益相关者机构活动的一部分，相当多的基础工作已经按部就班的开展。

在2004年召开可持续棕榈油圆桌会议之后不久，由于世界自然基金会中国分部的努力，2005年中粮集团成为RSPO会员 。自2008年以来，食品土畜进出口商会努力提高其成员对认证可持续棕榈油的认识，并在推广认证可持续棕榈油方面作出了很大贡献。在过去三年里，该协会一直积极参与可持续棕榈油圆桌会议，并在圆桌会议上分享其观点和看法。2009年，在举办中国全球油脂油料产业峰会的同时，食品土畜进出口商会于2009年11月组织了一次关于可持续发展棕榈油利益相关者的对话，这为中国推广可持续棕榈油网络的形成奠定了基础。其目标是：（1）支持中国可持续棕榈油的推广、采购和使用。（2）支持中国企业在油棕生产国投资生产可持续棕榈油。

在对诸如可持续发展、气候变化、低碳经济、可持续投资与贸易政策及中国企业面临的挑战等方面阐述的基础上，本研究提出了关于发展中国可持续棕榈油的若干建议。其中，建立国家层面的可持续棕榈油政策是重中之重。具体建议包括：

1、建立国家层面的可持续棕榈油政策目标

中国可持续棕榈油的国家政策目标是：只进口和使用被中国和/或国际认可的认证可持续棕榈油；同时确保中国海外投资企业生产认证的可持续棕榈油。该目标可以采用循序渐进的方式，比如先提出一个初步的指导性方案，但具体实现可能需要数十年的时间。这样到2020年，棕榈油进口在满足中国需求的基础上，也不会

对棕榈油生产国带来严重的环境影响。

2、建立基于中国贸易商、食品生产商及消费者的可持续棕榈油认证体系

中国应该建立自己的棕榈油可持续认证标准。该标准不但要满足本国需求，同时要与国际可持续棕榈油圆桌会议认证体系及其他可信赖的认证体系相一致。

3、提高国内可持续棕榈油的消费意识

无论是在政策或业务层面，还是在消费者决策意识中，在中国以环境和绿色为主题的经济并没有得到重视。有关政府机构、棕榈油供应链上的贸易商、制造商、零售商、消费者和其他使用者的可持续发展意识有待增强。只有建立一种与绿色食品、低碳生活方式、维持适度的生态足迹相关的强烈意识，才能国内市场对认证可持续棕榈油的消费。媒体的关注、政府的政策声明、对只使用可持续棕榈油产品的明确标识等等，都将会促进这种意识的建立。

4、为中国海外投资以及经营企业的环境可持续发展需求提供政策指导

中国企业在海外投资油棕种植需要政策指导，以便帮助他们树立可持续发展观，使这些企业遵守有关国家和国际法律，以及按照诸如可持续棕榈油圆桌会议原则和标准进行棕榈油生产。除可持续棕榈油圆桌会议之外，世界银行、国际金融公司、粮农组织等国际组织以及如汇丰银行等一些主要的国际私营部门在可持续棕榈油发展方面都制定了一些标准原则；已经在印度尼西亚加里曼丹岛投资油棕种植园的聚龙集团也有一些经验，中国政府在参考已有原则和经验的基础上，应该尽快制定有关海外投资环境可持续发展的政策原则。

5、启动与有关农产品进口有关的生态足迹问题专项研究

中国为确保粮食安全和满足其他方面的需求（诸如利用植物油作为工业原材料等），快速扩大有关农产品的海外投资和贸易。从环境或社会敏感地区和国家进口的商品进行政策评估过程中，需要引入生态足迹的理念。简而言之，生态足迹可以解释为人类或国家对地球生态系统和自然资源的利用。

2011年3月在北京召开的利益相关者圆桌会议就该研究取得的进展和建议进行了研讨， 相关意见和建议都已融汇到了项目最终报告中。这些研究成果将提供给中国及海外公共部门的决策者、企业领导以及其他利益相关者等棕榈油供应链的有关各方。

Prospects and Challenges of Sustainable Palm Oil for China

The Government of China has an overall strategy for the development of a Harmonious Society by 2020 that is focused on human progress, social civilization and sustainable development, parallel with the country's rapid emergence as a key player in the global economy. In the area of sustainable development, China has made commitments towards global agendas such as mitigation of climate change and biodiversity protection. As a major importer of palm oil and as a potential upstream producer, China can play a significant role in the sustainable development of this sector. The international palm oil industry and various national and international stakeholder groups have been meeting since 2004 to address serious concerns about how to make this very important commodity grow in production volume but without current levels of forest loss and environmental degradation.

Through the international Roundtable on Sustainable Palm Oil (RSPO) principles and criteria for sustainability have been defined and formulated into a certification system of relevance to the entire palm oil market supply chain. This certification system is now being introduced throughout the world with considerable uptake and interest not only on the part of producers and producer countries but also on the demand side, especially in Europe and a variety of multinational companies.

In recent two years, China's average palm oil import volume stands at over 6 million tons. Palm oil has become the first greatest import variety of vegetable oil for China with its increasingly strong impact on international palm oil industry. The increase of import can have a certain influence on the main producers of palm oil as well as global environment and society, drawing wide public concern from the parties concerned in the world. The international society recons that promoting import of sustainable palm oil in China is of great significance

for the future production and trade of sustainable palm oil in the world. The British side shows great interest in it and hopes to have a joint research in this area. Under the auspices of the China-UK Sustainable Development Dialogue (SDD), the project—Prospects and Challenges of Sustainable Palm Oil for China, sponsored by DEFRA and EFID of UK and supported by the Department of WTO Affairs of Ministry of Commerce, was initiated in July 2010.The project is implemented by China Chamber of Commerce for Import & Export of Foodstuffs, Native Produce & Animal By-Products (CFNA), providing the policy suggestions on promoting sustainable palm oil in China.

The objectives of the study are to :

(1) provide strategic policy guidance for the Chinese government towards the development of sustainable palm oil, (2) facilitate the adoption of sustainable trade policy with regard to palm oil in the upper levels of Chinese government and (3) provide a business case for shifting to sustainable palm oil that is relevant for Chinese commerce. The RSPO definition for sustainable palm oil production methods is that they should be "comprised of legal, economically viable, environmentally appropriate and socially beneficial management and operations."

Palm oil processed from the fruit bunches of the African oil palm (Elaeis guineensis) is today the world's leading vegetable oil, in terms of production, trade and the myriad of uses for food, industrial and biofuel applications. Cultivated entirely in the tropics from latitudes 100 South to 100 North, palm oil has become a key driver for agro-economic development in the producing countries in Southeast Asia, Papua New Guinea, and to some extent Central and West Africa and tropical South America. Compared with the other major vegetable oils, production of palm oil has grown at a phenomenal rate. In 2010, palm oil was 33 percent (45.9 million tonnes) of the world's vegetable oil production of 139.7 million tonnes. Indonesia and Malaysia together accounted for 82 percent (37.8 million tonnes) of total palm oil production.

Palm oil is also the most widely traded vegetable oil; the world's largest exporters being Indonesia and Malaysia, accounting for about 90 percent of the total trade in 2009. China, India and the European Union have been the world’s largest importers for many years. In 2009, China, India and EU27 countries imported 6.6 million, 6.8 million and 5.8 tonnes respectively, which is equivalent to 53 per cent of total imports. Palmoil demand for food and non-food applications will increase with rising populations and standards of living, and demand for biofuels. Global demand by 2015 might be up to 63 million tonnes, a 36 percent increase over 2010 production, and perhaps this could increase to 77 million tonnes by 2020. The implications for the environment and land use are substantial both in existing high production areas, and in other countries with potentially available lands.

China's consumption of palm oil has increased steadily since 2001 from about 1.5 million tonnes to about 6.5 million tonnes in 2009 (about 10 percent annual growth rate). Imports since 2006 have been stimulated by liberalization of the policy on imports. China's requirements for palm oil are met mainly from Southeast Asia and Papua New Guinea; the key supplier is Malaysia (61 percent of 6.44 million tonnes in 2009), followed by Indonesia. Palm oil is imported mainly as refined palm oil (70 percent) predominantly for food applications, with about 9 percent in the form of crude palm oil and 21 per cent as palm stearin. As most of the palm oil imported into China is used for processing and manufacturing of food and industrial products for domestic consumption, there is insignificant outflow of products from China. Looking into the future, the demand for

palm oil by China is expected to grow at about 10 per cent a year and it is expected to be about 8.6 million tonnes and 12.0 million tonnes by 2015 and 2020 respectively. The increase would be mainly for food uses to meet population and per capita consumption increases.

Although palm oil has been produced on a commercial scale since the beginning of the 20th century and numerous positive attributes have made it the world's leading vegetable oil, there has been much controversy over the sustainability aspects of this industry, particularly over the past decade. From the perspective of the growers, production of palm oil has been sustainable for a long time in that best management practices have been put in place for production and practices and they have complied with relevant national laws. Oil palm has the highest productivity per hectare compared with other oil seed crops; it is 10 times more productive than soybeans and 5 times that of rapeseed.

From the socio-economic point of view, palm oil in producing countries such as Malaysia and Indonesia has contributed significantly towards job creation, reduction of poverty and regional economic development. However, other stakeholders particularly NGOs have raised serious concerns over unsustainable expansion of the sector that could cause further destruction of the remaining tropical forests and their rich biodiversity. Deforestation, particularly in fragile landscapes such as the extensive peat lands of Indonesia, could lead to substantial greenhouse emissions and contribute to climate change. The massive expansion in oil palm cultivation in the past few decades, particularly in Indonesia has also resulted in numerous

social conflicts involving plantation companies and development agencies and indigenous peoples, local communities, smallholders as well as workers in the sector. The Government of Indonesia and other countries such as Brazil interested in expanding palm oil production have indicated thei r concern that future development should done on a sustainable basis.

A concerted effort among the actors in the palm oil supply chain is required to address sustainability challenges. The main impetus has been the Roundtable on Sustainable Palm Oil (RSPO) established in 2004 with the objective "to advance the production, procurement and use of sustainable oil palm products through the development, implementation and verification of credible global standards and the engagement of stakeholders along the supply chain."

RSPO is a multi-stakeholder organization that brings together the key players in the palm oil supply chain, namely palm oil producers, processors and traders, consumer goods manufacturers, retailers, banks and civil society organizations including environmental/nature NGOs and social/developmental NGOs. RSPO has made unprecedented progress and has become the most advanced roundtable platform dedicated to addressing the sustainable production of a single commodity crop throughout the supply chain. A standard for defining sustainable palm oil was developed through a multi-stakeholder process within the initial 2 years, followed by the development of a certification system and trade and traceability mechanisms.

The first RSPO certification for production of sustainable palm oil was awarded to United Plantations (Malaysia) on 26 August 2008, and trade of CSPO commenced in November 2008 when the first shipment of 500 tonnes of CSPO reached Rotterdam. The volume of CSPO increased steadily as more producers received certification. As of 14 February 2011, there are 84 certified palm oil mills, together capable of producing more than 3.61 million tonnes of CSPO. The largest producer is Malaysia where 50 mills can produce about 1.93 million tonnes or about 60 percent of total production. Indonesia is the second-largest producer of CSPO accounting for more than 33 percent, with the balance from plantations in Papua New Guinea

and Colombia.

Purchase of CSPO produced to-date has been mainly in EU countries. After a slow start, consumption in 2010 increased to 56 per cent of total CSPO production of 1.28 million tonnes. The total volume of CSPO compared to overall palm oil production is expected to increase since major manufacturers in Europe and USA have made commitments to source only CSPO, generally by 2015. These commitments were made in part as the result of a sustainable palm oil campaign on the part of environmental non-governmental organizations during the past few years, described in a number of brief case studies included in the report. The first importing country to set a 100 percent goal for CSPO is the Netherlands, where palm oil consuming companies have collectively pledged to source only CSPO domestically by 2015.

For CSPO to become a mainstream commodity, demand must spread to other major consuming countries, especially China and India (which account for 37 percent of global palm oil imports.) It said that a mainstream market breakthrough will occur if global demand for CSPO reaches 20 percent by 2013, and 40 percent by 2019, with China, India and Indonesia being the most significant emerging markets for CSPO.

The business case for sustainable palm oil in China is really a case for the greening of the entire market supply chain for palm oil—from the conditions under which oil palm is planted, grown and produced into crude palm oil, to environmentally-sound production and use in a wide variety of products in China, and to wholesale and retailing where various sustainability conditions may be imposed by consumer demand within and outside China. The business case will be driven by profitability, risks and by the alignment of national interest and business interests. The likely outcome is not whether CSPO will become important, but how soon. It may be most urgent for large traders, for those Chinese companies wishing to invest directly in palm oil production, and for those manufacturers in China with export-oriented products

containing palm oil.

Profitability for traders and businesses in China that sell or utilize palm oil is unlikely to be seriously upset by embracing sustainability certification, since the cost is relatively low, and as long as consumers understand the reason why certification is important.

There may be risks in buying CSPO for use in China, for example the risk that global CSPO demand eventually outstrips supply and palm oil prices rise even further than in recent times, or that CSPO markets are undercut by producers of non-certified palm oil selling much more cheaply. However, these risks must be balanced against the risk of not buying CSPO at a time when there clearly is a shift to CSPO underway. The risks of ignoring this shift include campaigns against products containing non-CSPO, especially those exported from China, or collateral damage to other trade, and difficulties for Chinese investors who may be unable to readily access suitable lands or raw palm oil abroad during the coming decade.

The alignment of national interests and business interests depends upon greening of the palm oil supply chain being consistent with China's major commitment to improving environment and sustainable development, including concerns such as Low Carbon Economy, climate change mitigation and biodiversity protection. China also is seeking better international cooperation in general, including with its neighbors such as the ASEAN nations, and with Africa and Latin America. China is already making significant progress towards a “green economy”, including trade and sustainable development matters, and will accelerate its environmental efforts during the 12th Five Year Plan.

For Chinese enterprises involved with palm oil, the coming five years will be a critical period for the development of a robust sustainability approach that will offer better guarantees for the future stability of the palm oil sector and its contributions to food security, economic prosperity and global environmental improvement. In so doing, the enterprises should improve their own financial standing. Chinese enterprises and their associations can take the lead in building an internationally recognized, largely voluntary approach with a high degree of participation in sustainability certification. The costs for Chinese enterprise participation in this effort can be spread over time, and staged across

businesses operating at different scales and levels of environmental and sustainable development sophistication.

The study has examined a number of ways in which China could move progressively towards successful adoption of CSPO based on Chinese characteristics and needs. The Government of China needs to send appropriate signals to enterprises, the financial sector and stakeholders inside and outside of China that it endorses the adoption of sustainable practices on the part of Chinese businesses engaged in trade, investment and production of palm oil products, and by building awareness of the value of these practices. In this way, China will help to set the framework and to accelerate the pace of action all along the palm oil supply chain. Fortunately, considerable groundwork already is falling into place on the part of the trading associations, companies and stakeholder organizations.

Interest in promoting sustainable palm oil in China started soon after the establishment of the RSPO in 2004. The initial effort was undertaken by WWF China and WWF International as part of the global WWF Forest Conversion Initiative to prevent further conversion of the remaining tropical forests for palm oil and soy production. CFNA has contributed to the effort in awareness raising and promotion of sustainable palm oil among its members since 2008. It has been actively involved in the annual roundtable meetings of the RSPO and has shared its perspectives and views during these meetings in the past 3 years. In conjunction with the China International Oils & Oilseeds Industry Summit in 2009, CFNA organized a stakeholder dialogue on sustainable palm oil and this laid the foundation for the formation of the Network for Promoting Sustainable Palm Oil in China in November 2009. The objectives of the Network are to: (1) support the promotion, procurement and use of sustainable palm oil in China and (2) support the production of sustainable palm oil through any investments in producing countries that are consistent with the principles for sustainable palm oil production, national laws and China's guidelines for sustainable agriculture.

Following a review of the present policies and frameworks relating to sustainable development, climate change, low carbon economy, sustainable investments and trade and taking into account the challenges that Chinese enterprises might face, this study provides several policy

options for the promotion of sustainable palm oil for China. The first, establishment of a national policy objective for sustainable palm oil should be an overarching, high priority. The recommendations include the following:

1. Establish a National Policy Objective for Sustainable Palm Oil

The national policy objective should be for China to import and utilize only palm oil that is produced in a sustainable fashion according to Chinese and/or internationally recognized standards, and to ensure that Chinese traders, businesses and investors operate abroad in an environmentally and socially sustainable manner. It is an objective that could be started with pilot initiatives and fully implemented over a decade, so that by 2020 this resource, which is vital to China's food security, and an important ingredient in many products consumed domestically or exported, will meet growing Chinese demand without excessive environmental damage in the producing countries.

2. Establish a Chinese Market-based Sustainability Certification Standard for Palm Oil Traders, Food Processors, and Industrial Users

China should construct its own system of certification for sustainable palm oil that can satisfy domestic standards and needs, and is compatible with the RSPO international certification system and possibly other emerging certification efforts if they are sufficiently credible.

3. Support Domestic Awareness-raising and Demand for Sustainable Palm Oil

The awareness of relevant government agencies, retail businesses,

manufacturers using palm oil, traders, domestic consumers and others needs to be significantly increased, since this environment and green economy subject is currently not receiving much attention either at the policy or operational level, or as a factor in consumer decision-making within China. Increasing domestic demand for CSPO depends on building this awareness and establishing a strong rationale linked to green foods, low carbon lifestyle, and maintaining a modest ecological footprint. It could be helped by generating greater media interest, by governmental policy statements and guidance, and by clear identification of products that use only sustainable palm oil.

4. Issue Guidelines Governing Environment and Sustainable Development Requirements for Chinese Overseas Investment and Operation of Chinese Enterprises Abroad

Chinese enterprises investing in overseas plantation development and production of palm oil need guidelines that will help them to establish what constitutes appropriate sustainability behavior and standards, including compliance with national and international laws and with voluntary standards such as the RSPO Principles and Criteria. These guidelines should be established by the Government of China as soon as possible and should take into account the considerable effort of international organizations such as the World Bank, the IFC, and FAO, in addition to the RSPO, and the efforts of some major international private sector companies such as the HSBC. As well, it would be wise to take into account the experiences of existing Chinese companies that have been active in palm oil investment such as the Julong Group operating in East Kalimantan.

5. Initiate an International Cooperation Program to Address China's Expanding Ecological Footprint Related to Estate Crop Commodity Imports

Ecological footprint should be incorporated into the policy assessment of proposed increases in the import of commodities from environmentally and/or socially sensitive regions and countries. Most simply, ecological footprint is explained as peoples' or a nation's draw upon the ecosystems and natural resources of the planet. With China's rapid expansion through overseas investment and trade involving estate crop commodities to ensure food security and to meet other needs such as the use of vegetable oils as industrial raw materials, there comes a greater need to reduce negative impacts and to foster positive ones globally and in host countries.

The preliminary findings and recommendations of this study were examined at a multi-stakeholder meeting convened in Beijing in March 2011 and several improvements and suggestions for further work have been incorporated in the final report. The results of this study will be communicated to policy makers in the public sector, leaders of enterprises and relevant stakeholder organizations along the palm oil supply chain in China as well as overseas.



中国食品土畜进出口商会
地址：北京市崇文区广渠门内大街 80 号通正国际大厦 4 层
邮编：100062
电话：+86–10–87109836, 87109837
传真：+86–10–87109838, 87109814
Email: chenying@cccfna.org.cn
Website: http://www.agriffchina.com/

CHINA CHAMBER OF COMMERCE FOR IMP. & EXP. OF
FOODSTUFFS, NATIVE PRODUCE & ANIMAL BY–PRODUCTS
Add: 4/F, Talent International Building , No.80, Guangqumennei Street ,
Chongwen District, Beijing , 100062, China
Tel: +86–10–87109836, 87109837
Fax: +86–10–87109838, 87109814