

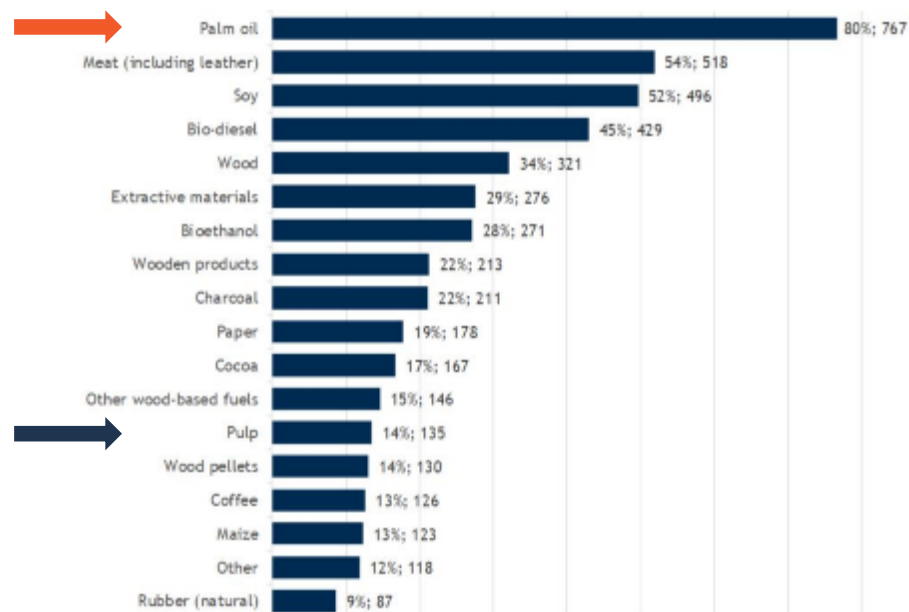


The case of palm oil & the latest state of play in Indonesia and Malaysia



Public perception

EC PUBLIC CONSULTATION RESULT: COMMODITIES THAT EU LAW MUST ADDRESS

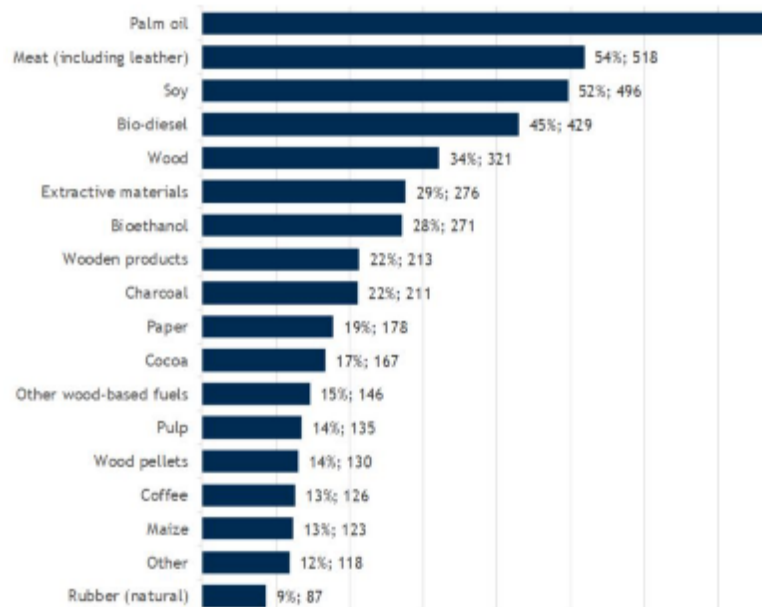


Public perception

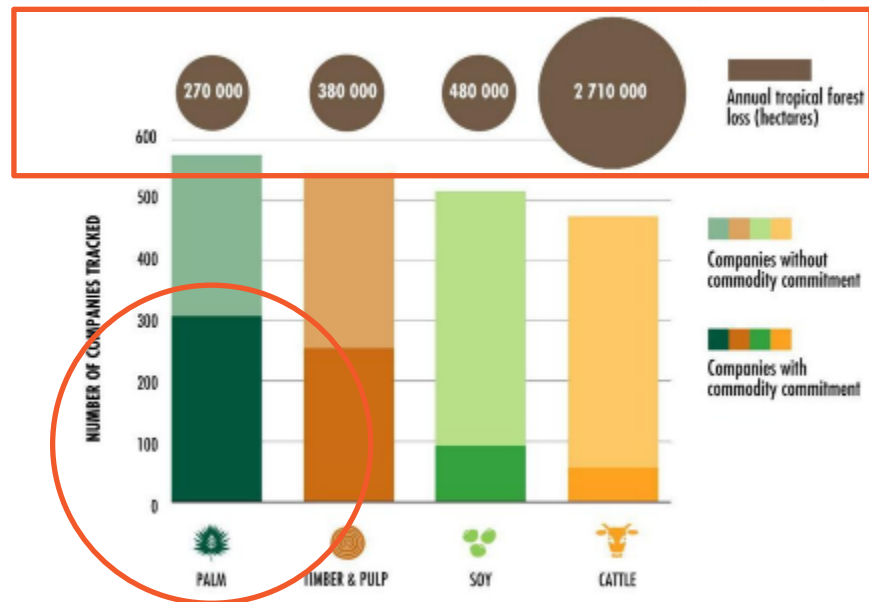
vs

Reality...?

EC PUBLIC CONSULTATION RESULT: COMMODITIES THAT EU LAW MUST ADDRESS



NUMBER OF COMPANIES THAT HAVE AND HAVE NOT MADE DEFORESTATION-RELATED COMMITMENTS, BY COMMODITY, 2020



SOURCE: Forest Trends (2017) updated with data from Forest Trends (2020). Tropical forest loss data from Henderson, Peresson and Kautner (2015).

How Satelligence verifies sustainable sourcing

We scan each 10m2 of earth every day using satellites

Our global Palm Oil supply chain geodatabase contains:

65689 plantations

[Geolocation and
ownership]



2089 mills

[Geolocation and
ownership]



173 refineries

[Geolocation and
ownership]



494 ports and terminals

[Geolocation and
ownership]





CONTEXTUAL ANALYSIS

22 years of daily

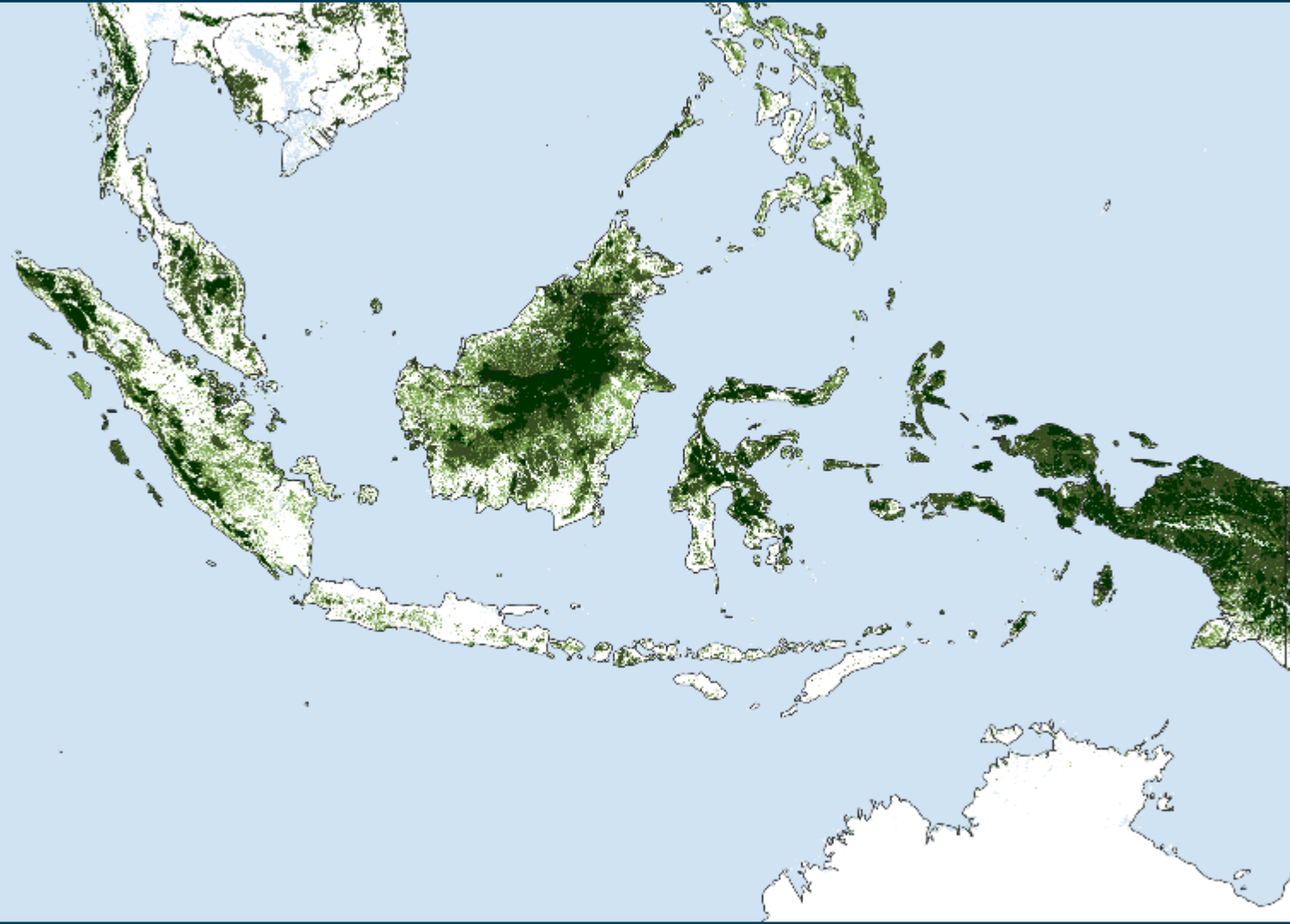
Input Satellite

imagery

CONTEXTUAL ANALYSIS

Forest types

- Primary forest
- Disturbed forest
- Young regrowth
- Water

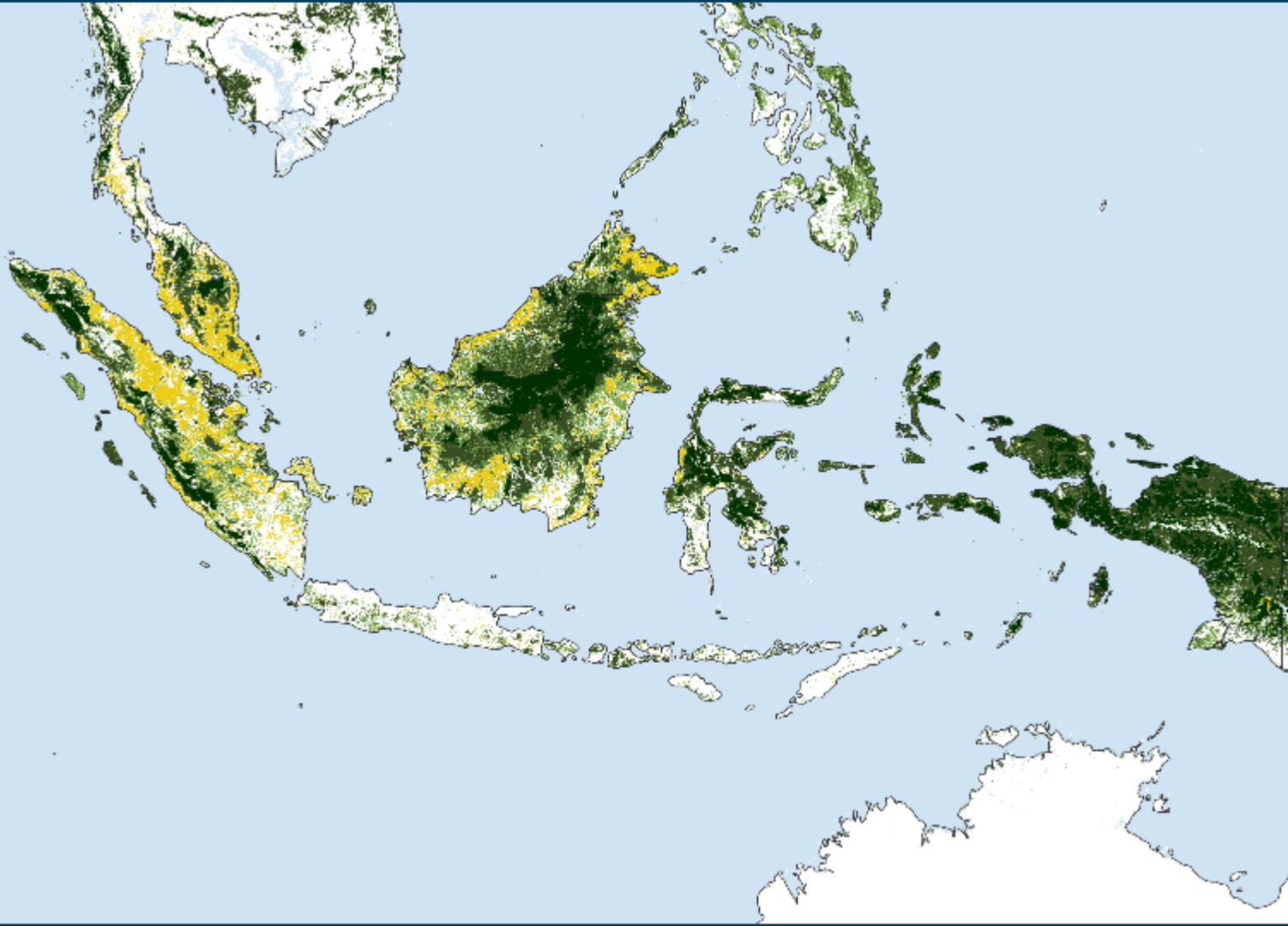


CONTEXTUAL ANALYSIS

Forest types

Planted Oil Palm

- Primary forest
- Disturbed forest
- Young regrowth
- Planted oil palm
- Water



CONTEXTUAL ANALYSIS

Forest types

Planted Oil Palm

Deforested area

- 
- The map displays the Indonesian archipelago with various land use categories. Forest types are shown in shades of green, while oil palm plantations are highlighted in yellow. Deforestation is indicated by red and orange circles of varying sizes, representing different time periods. Water bodies are shown in light blue.
- Primary forest
 - Disturbed forest
 - Young regrowth
 - Planted oil palm
 - Water
 - Deforested 2022Q1
 - Deforested 2021
 - Deforested 2020
 - Deforested 2019

CONTEXTUAL ANALYSIS

Forest types

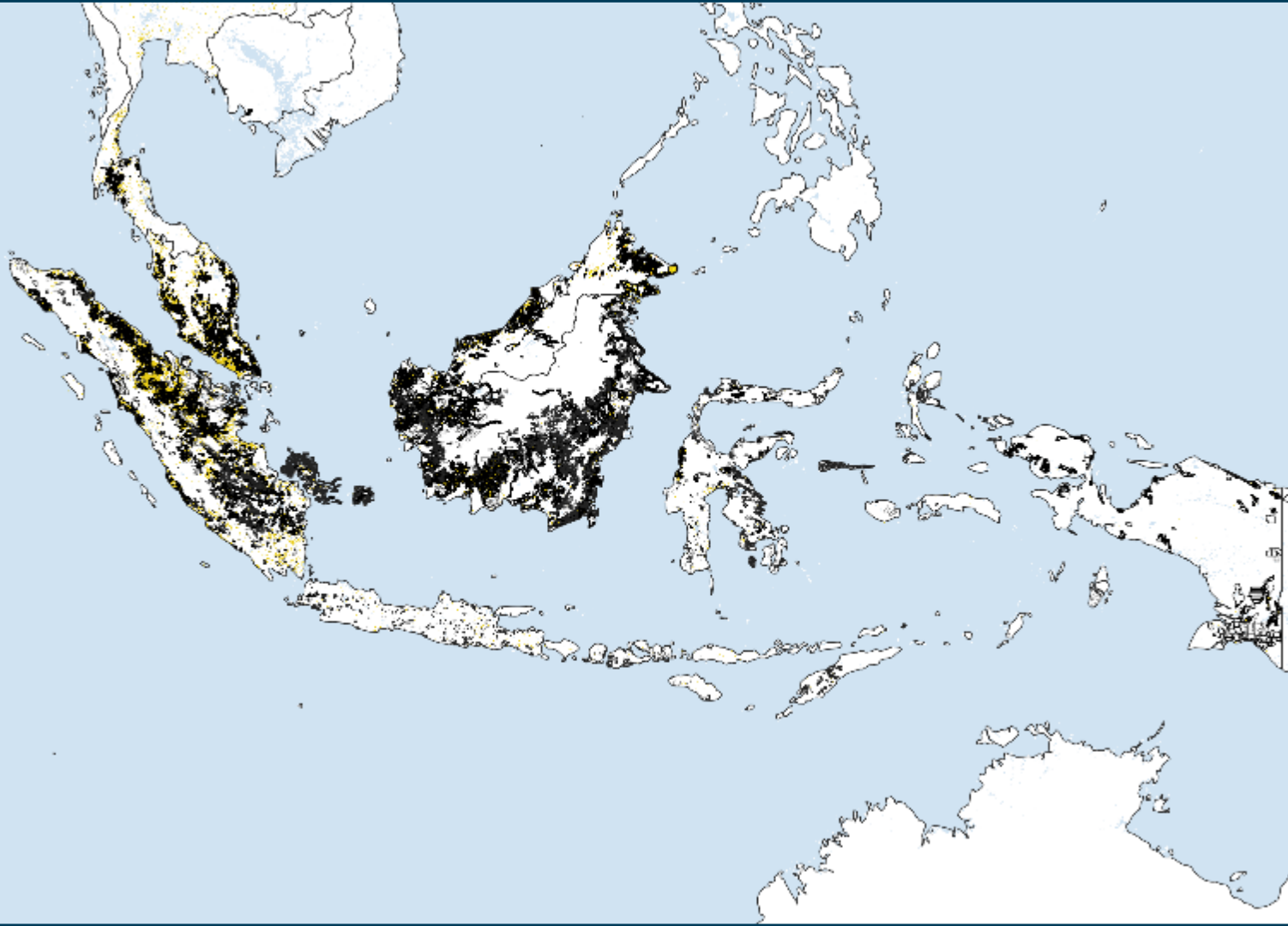
Planted Oil Palm

Deforested area

Concessions

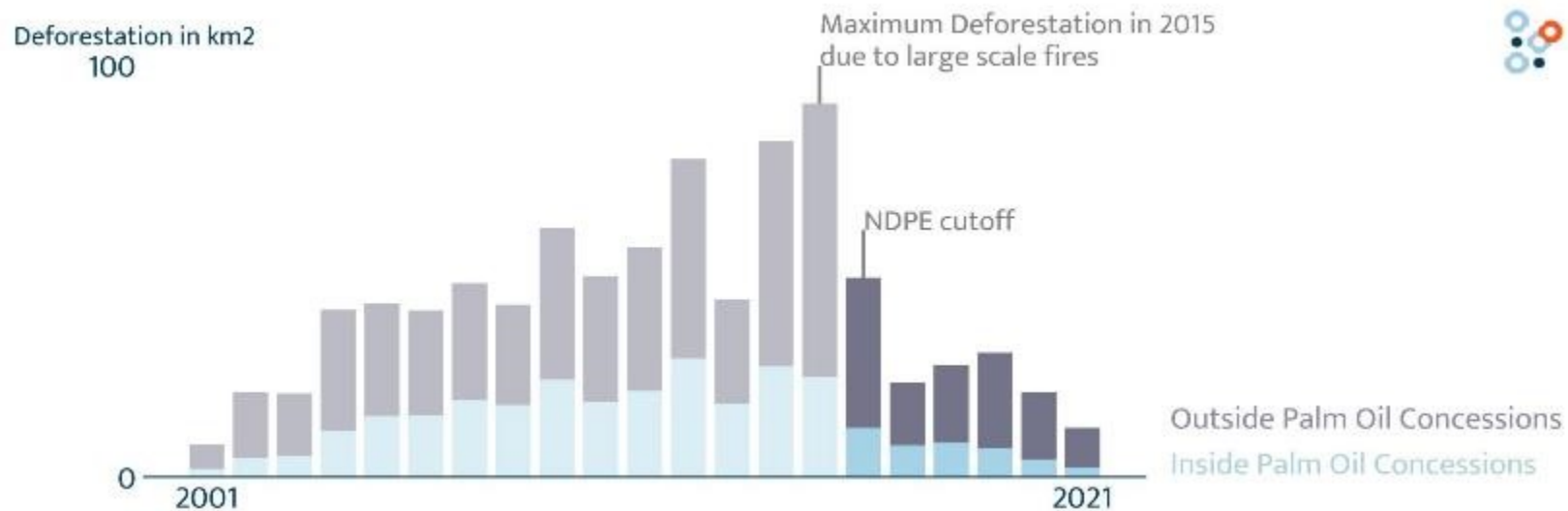
(Oil Palm, Pulp, Mining)

- Primary forest
- Disturbed forest
- Young regrowth
- Planted oil palm
- Water
- Deforested 2022Q1
- Deforested 2021
- Deforested 2020
- Deforested 2019



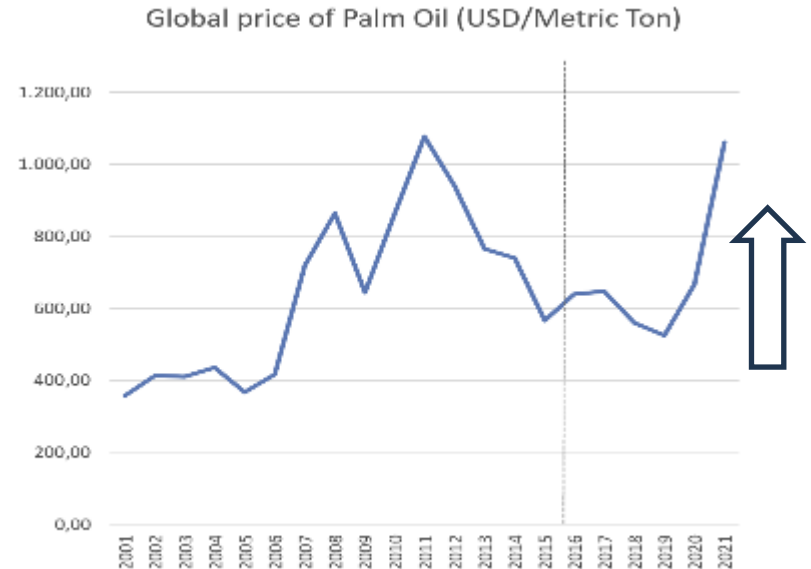
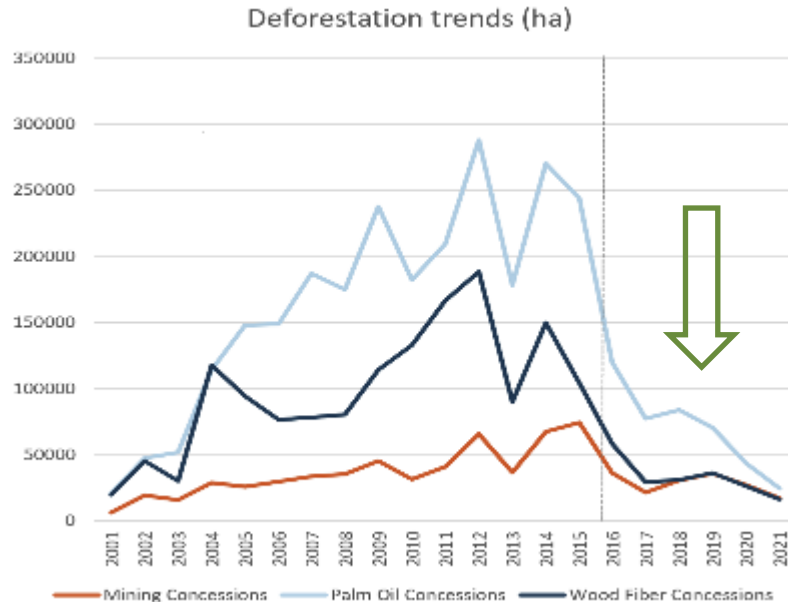
Analysis Results Indonesia

Marked decrease in palm-driven deforestation since 2015 NDPE commitment cut-off date



Analysis Results Indonesia

Palm-driven deforestation keeps declining despite strongly increasing palm oil price since 2019



Analysis Results Indonesia

Slowing not because of production volume decrease, not because of decreasing (EU) demand...

Economic growth drop in 2020 but fast rebound

Slowing not because there is hardly any forest left:
~20-70% forest remaining inside concessions

Chain Reaction Research (Aidenvironment): 4 year low
Satelligence + Gaveau *et al.* 20 year low



What about oil palm smallholders?

Industrial plantations expanded faster than smallholder plantations

Smallholders converted 3 times less forest (2.13 Mha vs 0.72 Mha)*

Smallholders clear mostly young regrowth rather than disturbed/primary forest

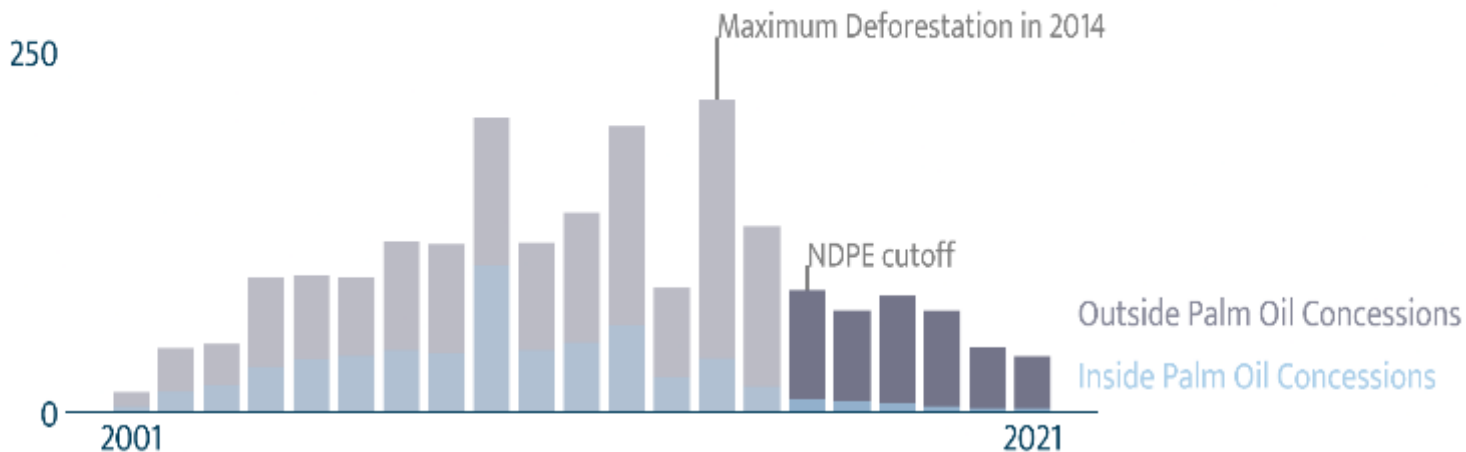
**Gaveau et al 2021*



Analysis Results Malaysia

Palm-driven deforestation keeps declining despite strongly increasing palm oil price since 2019

Deforestation in kha

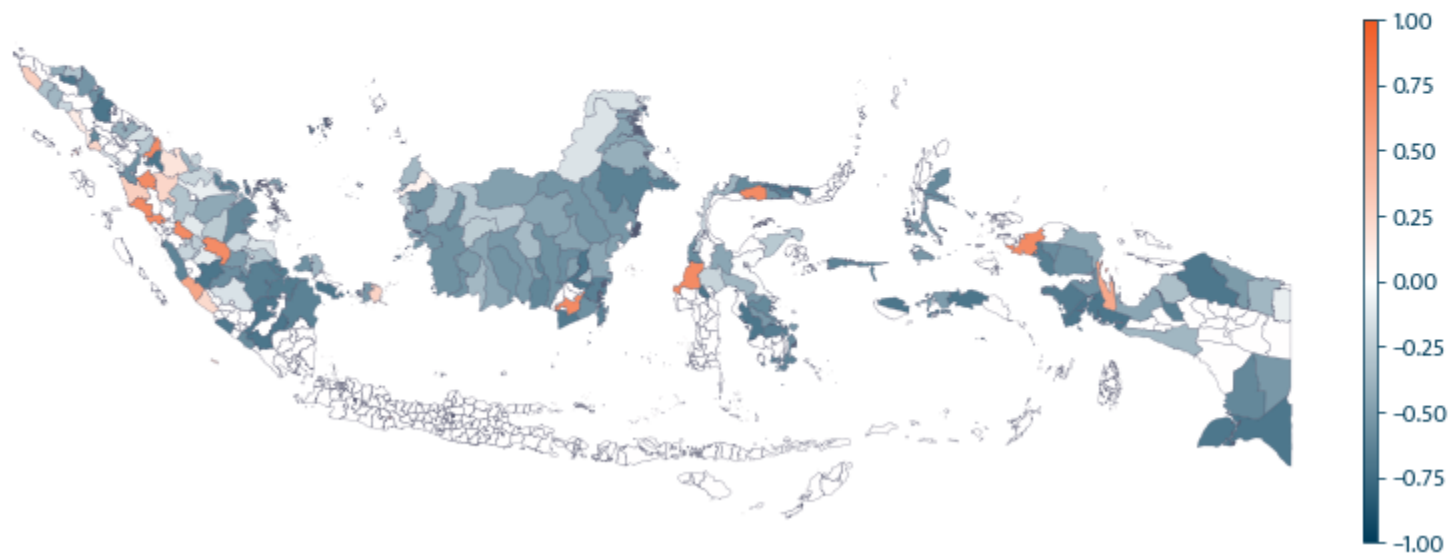


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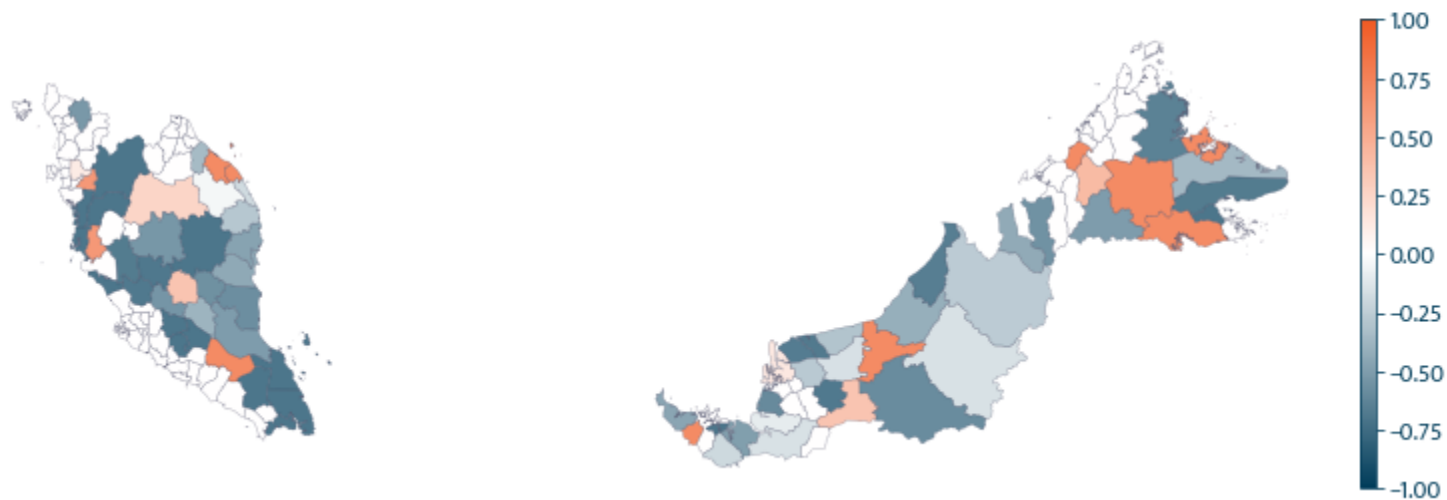
Recognition for achievements is due!
What's left to be desired?



Change in Deforestation within Palm Oil Concessions rates of 2021 compared to mean of 2018-2020



Change in Deforestation within Palm Oil Concessions rates of 2021 compared to mean of 2018-2020

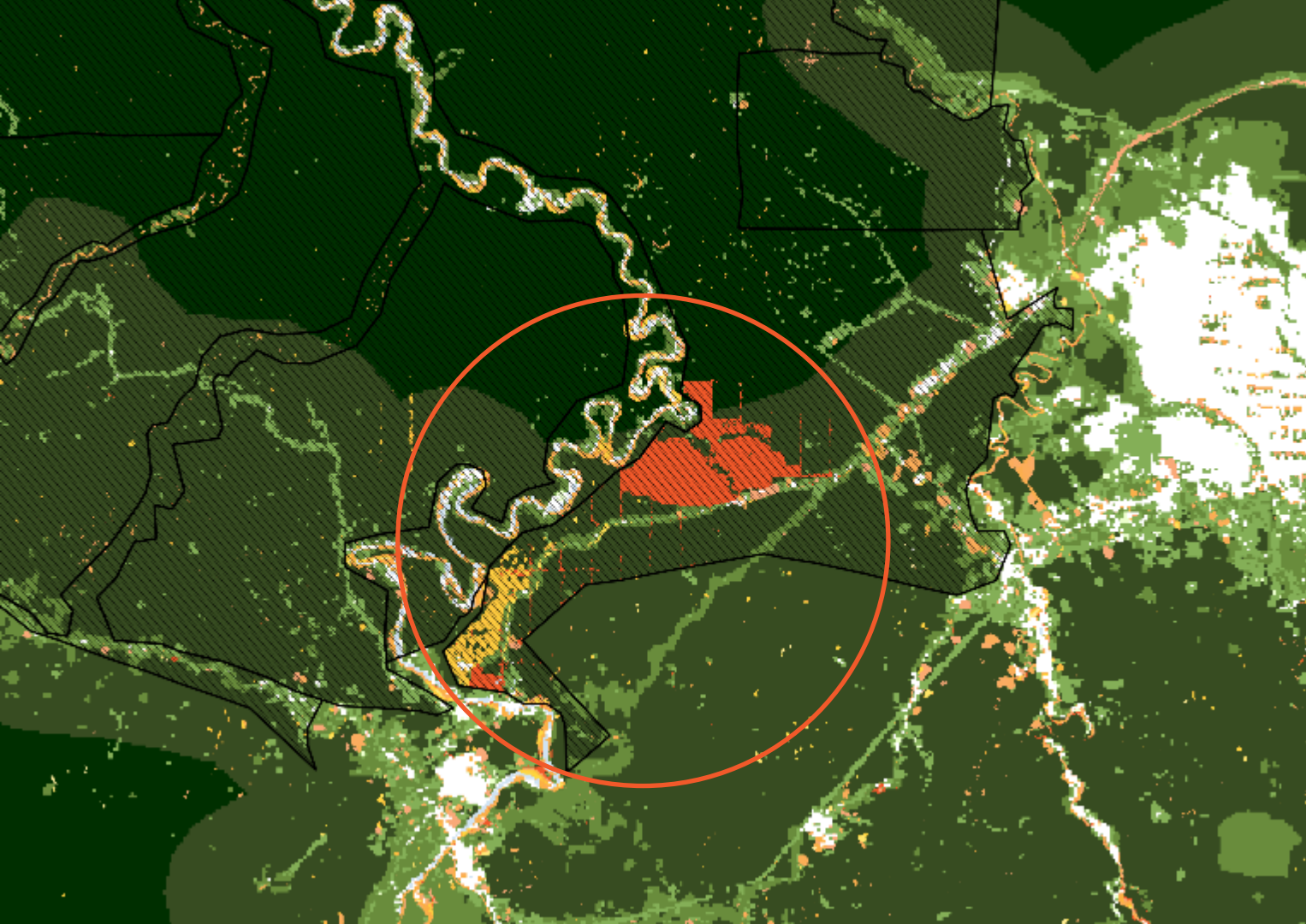


Case 2. Pipit Group (Palm oil)



- Primary forest
- Disturbed forest
- Young regrowth
- Peatland
- Water
- Deforested 2022Q1
- Deforested 2021
- Deforested 2020
- Deforested 2019

Case 1. IndoGunta / Salim Group (Palm oil)



- Primary forest
- Disturbed forest
- Young regrowth
- Peatland
- Water
- Deforested 2022Q1
- Deforested 2021
- Deforested 2020
- Deforested 2019