

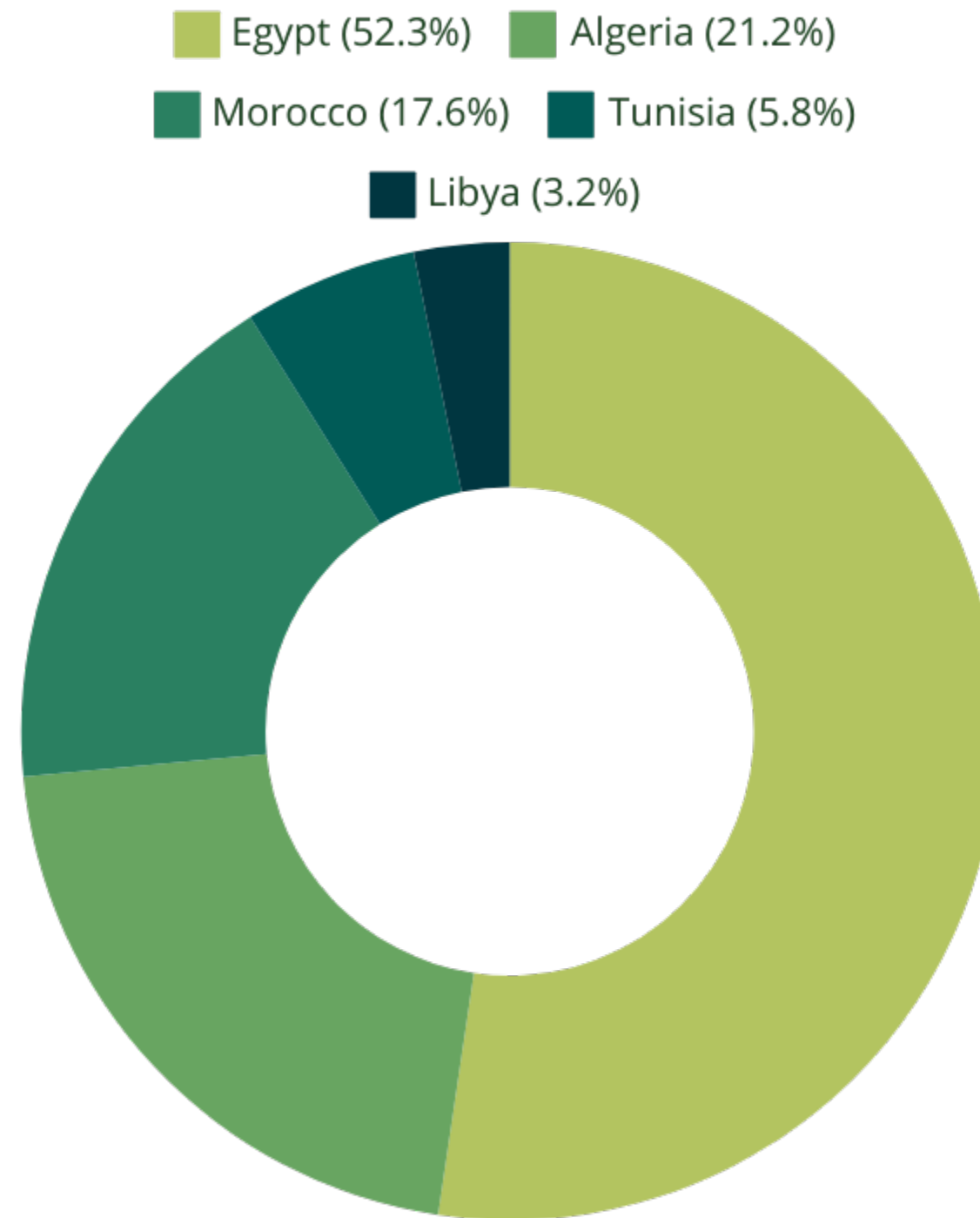
Malaysian Palm Oil Growth Potential

North African Region



01/ Region Coverage

The North Africa region, encompassing five countries and a substantial population of 215.3 million, is a pivotal driver in fostering demand growth for oils and fats within the region.



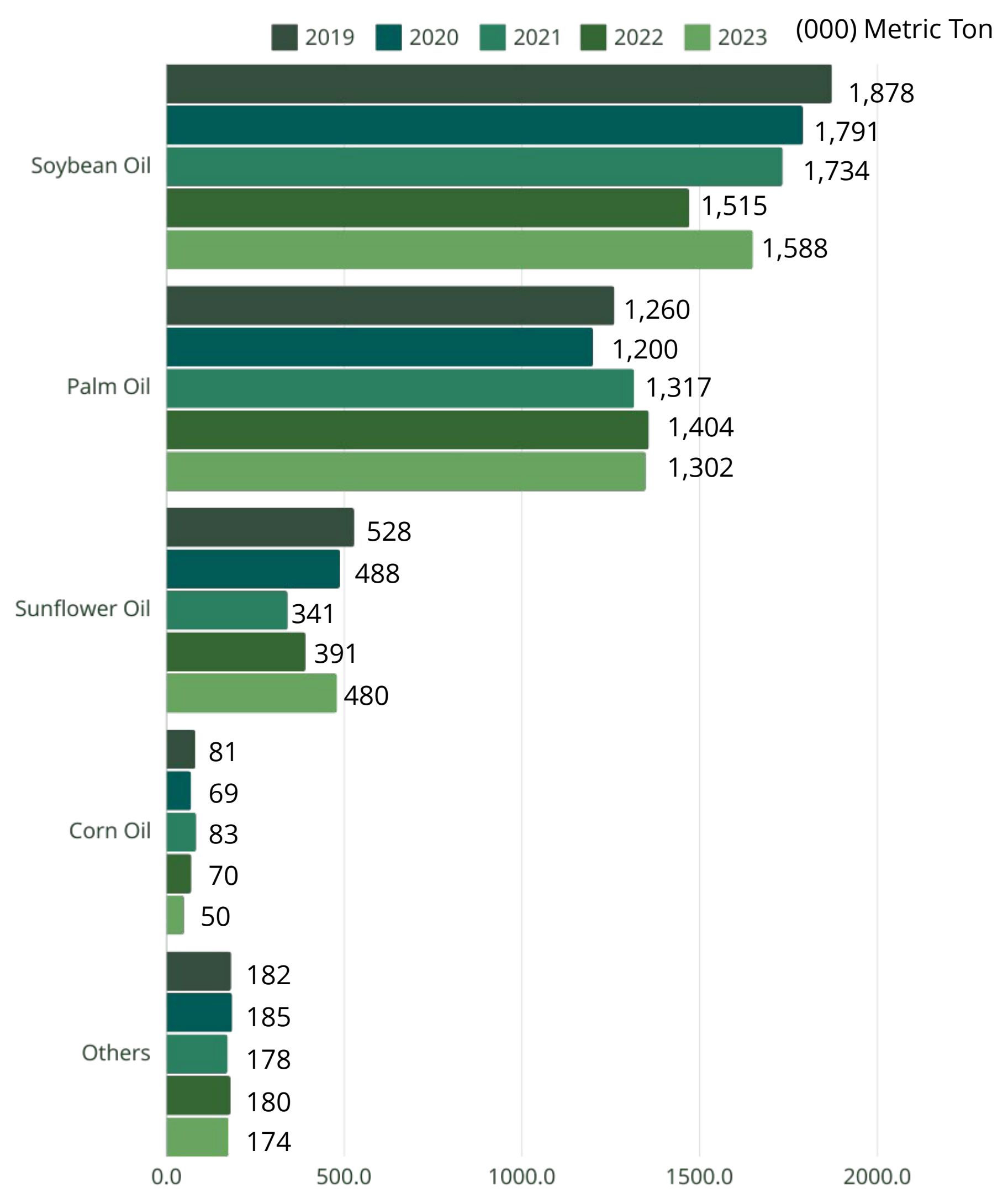
02/ Supply & Demand

- The region remains significantly reliant on imports as a local production in 2023, totaling 1.13 million MT, which only covers 26.7% of the domestic demand.
- The total consumption of oils and fats reached 4.29 million MT, and the majority is fulfilled through imported sources.
- Soft oils, including soybean, sunflower, and corn, dominate the market with a 58.3% share of total oils and fats imports, whereas palm oil accounts for 36.4% of the market share.
- Overall, the region imported a total of 3.37 million MT of oils and fats to meet its consumption needs.

03/ Oil & Fats Imports

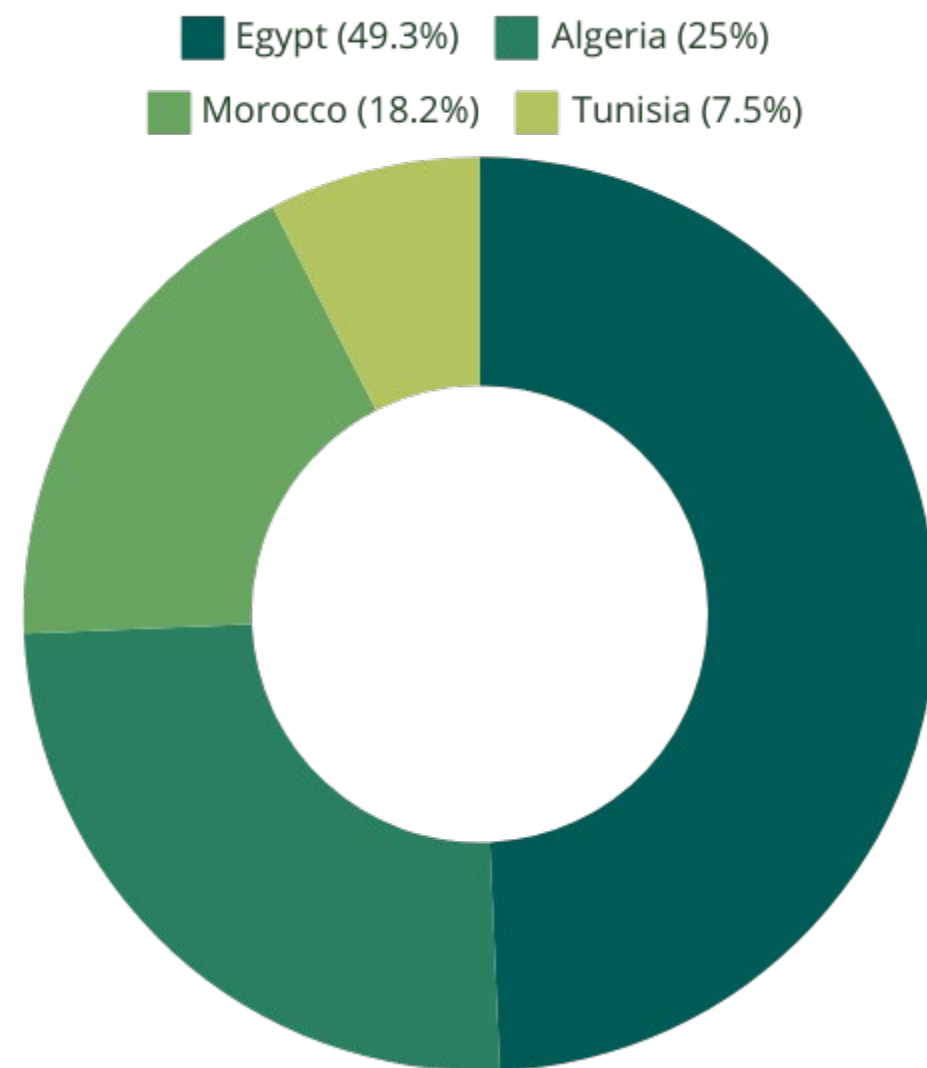
Soybean Oil has been the most imported oil in North Africa in the past five years, followed by Palm Oil in second place and Sunflower Oil in third place.

However, the growth rate of palm oil surpasses that of Soybean Oil, which has been declining for the past five years. So, the demand for Palm Oil is increasing, which means there is room for growth in the future.

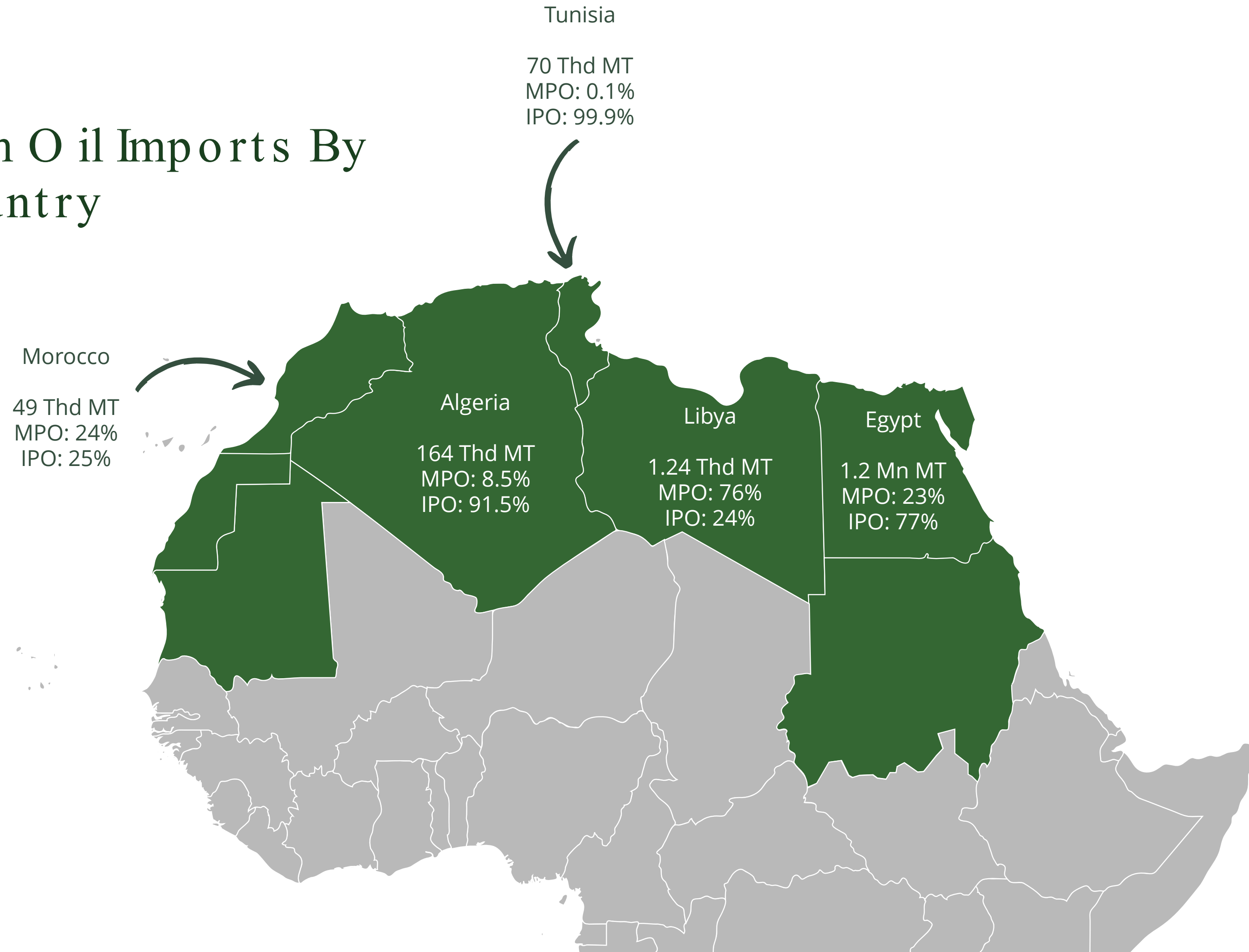


04/ Oils & Fats Consumption

Egypt retained its position as the largest consumer of oils and fats in North Africa region, consuming 2.24 million MT, followed by Algeria at 1.1 million MT, Morocco at 828,000 MT, and Tunisia at 341,000 MT



05/ Palm Oil Imports By Country



06/

Market Drivers For Palm Oil Growth

Oil & Fats Profile:

- Insufficient local production
- Increasing demand
- Dependency on imports

Policies:

- Several regional free trade agreements
- Low import tariff for palm oil applicable in some countries
- No restrictions on palm oil imports

Growing Market:

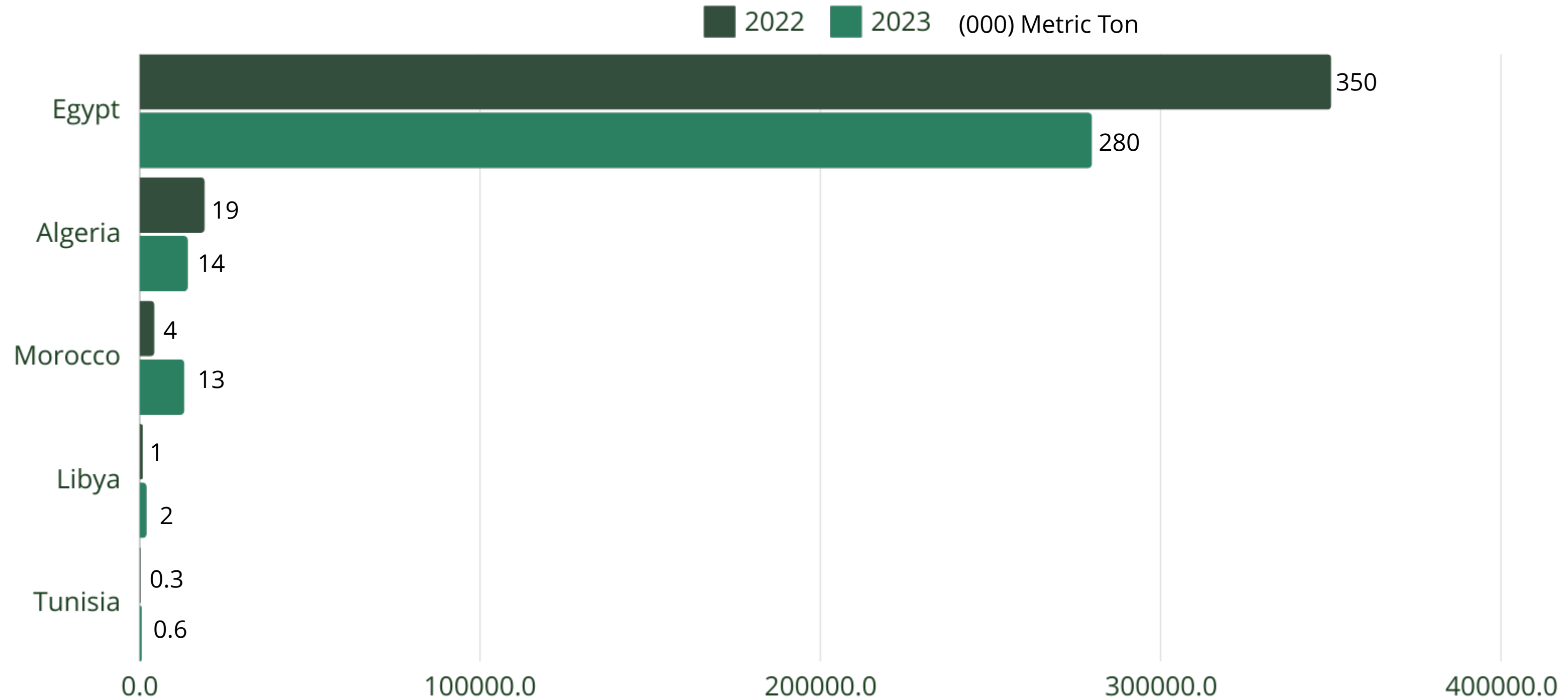
- Populous region
- Large, Growing, and Young Population
- The expanding trend in consumer preference for fast foods
- Large consumer market with a strategic location

Industrial Progress:

- Wide variety of palm oil applications
- Growing HORECA sector
- Expanding demand potential for non-food uses

07/

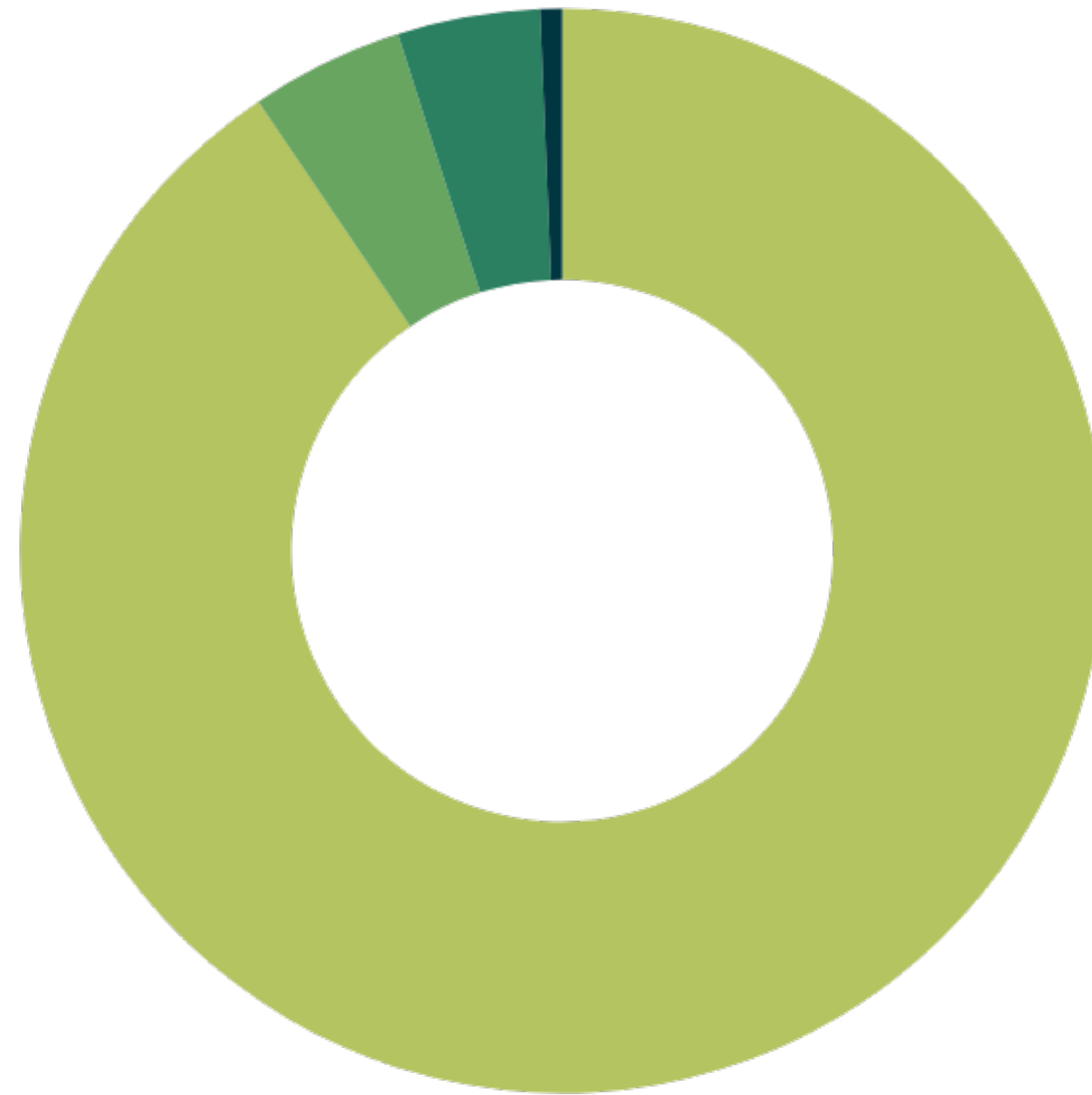
MPO Exports To Region By Country



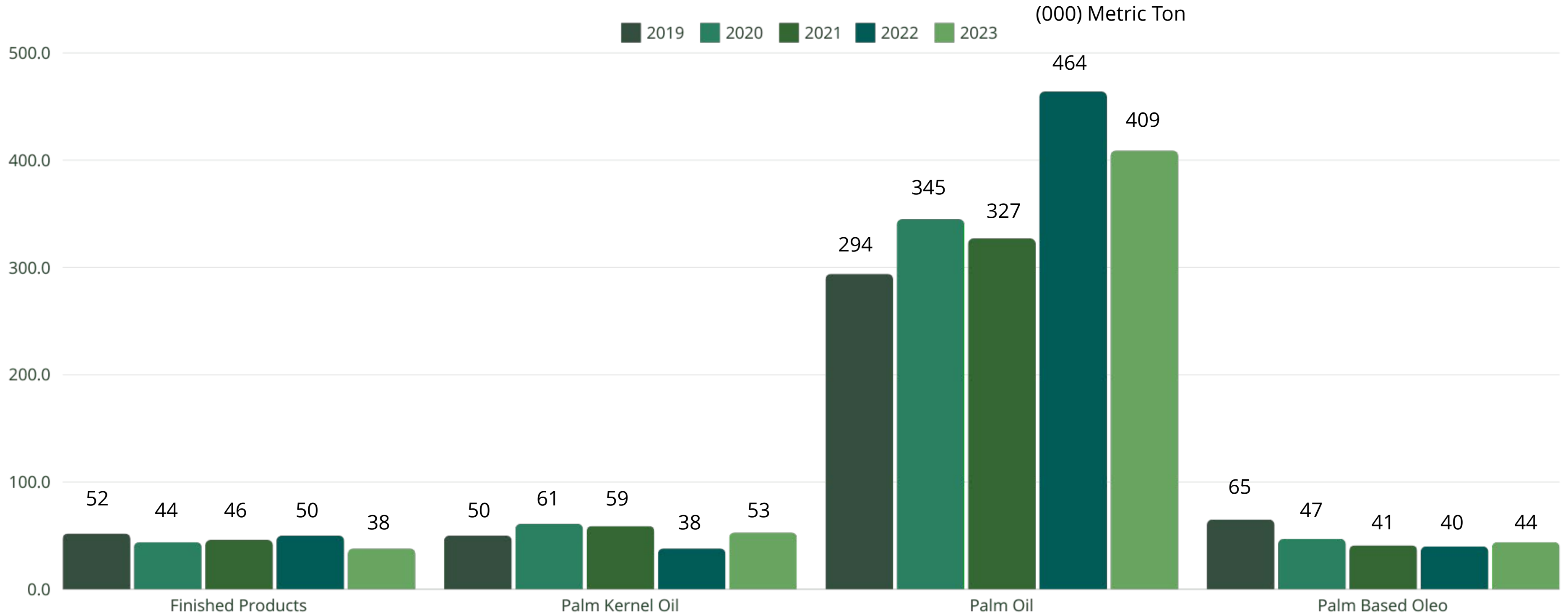
08/ MPO Exports Share By Country



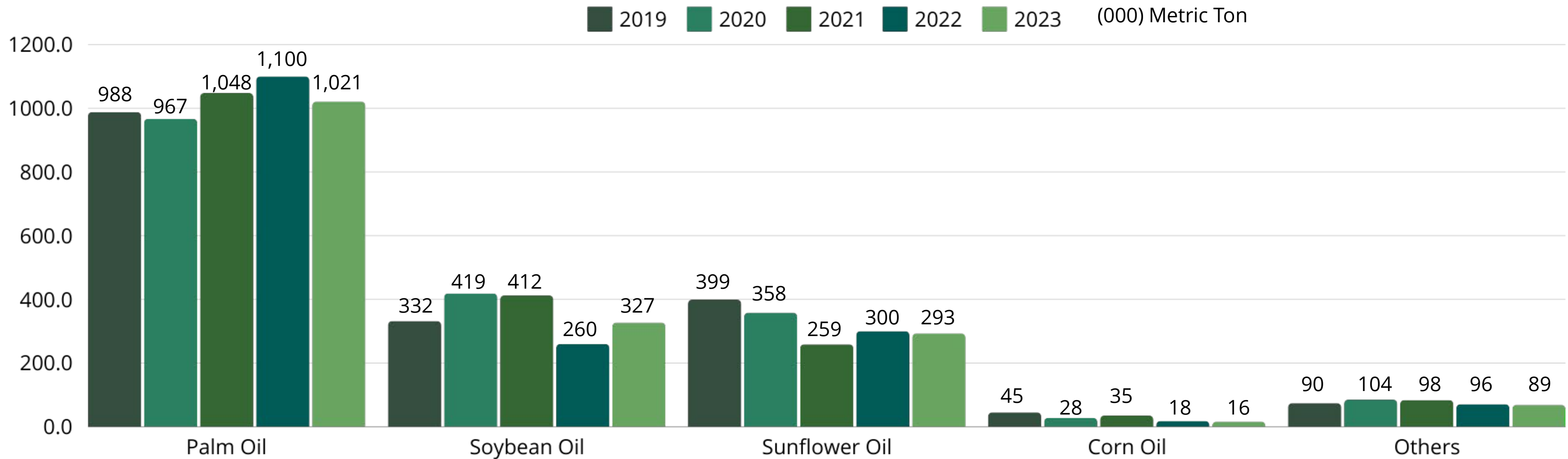
Egypt (90.5%) Algeria (4.6%)
Morocco (4.2%) Libya (0.7%)



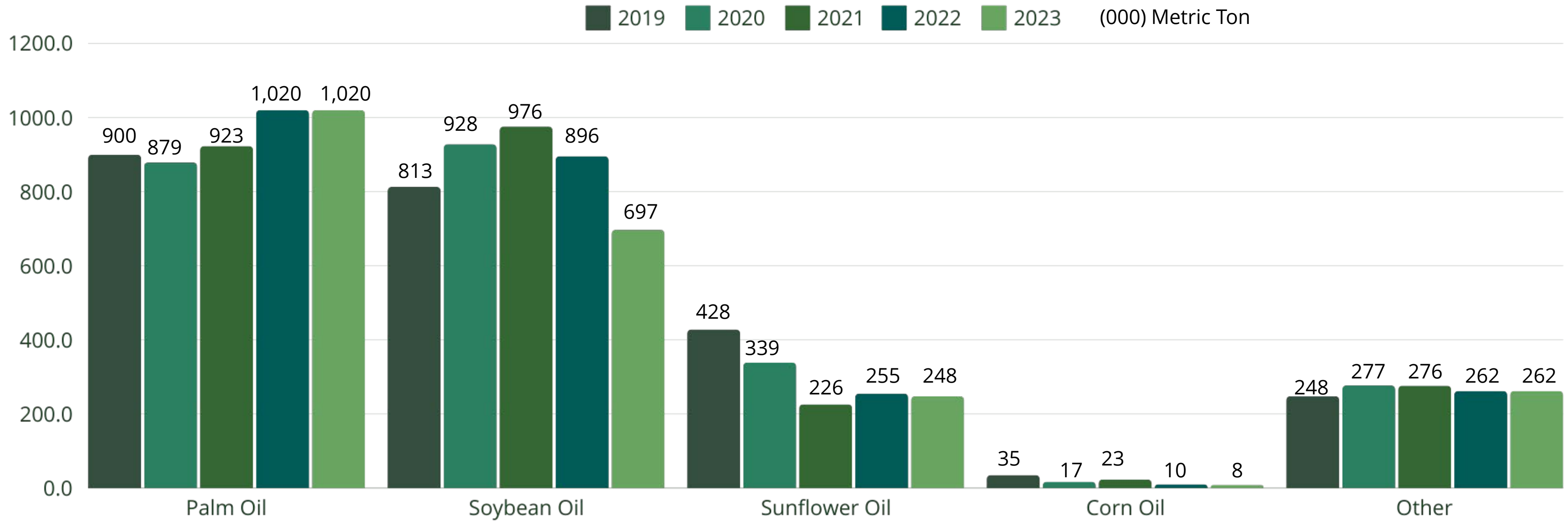
09/ MPO Exports By Product



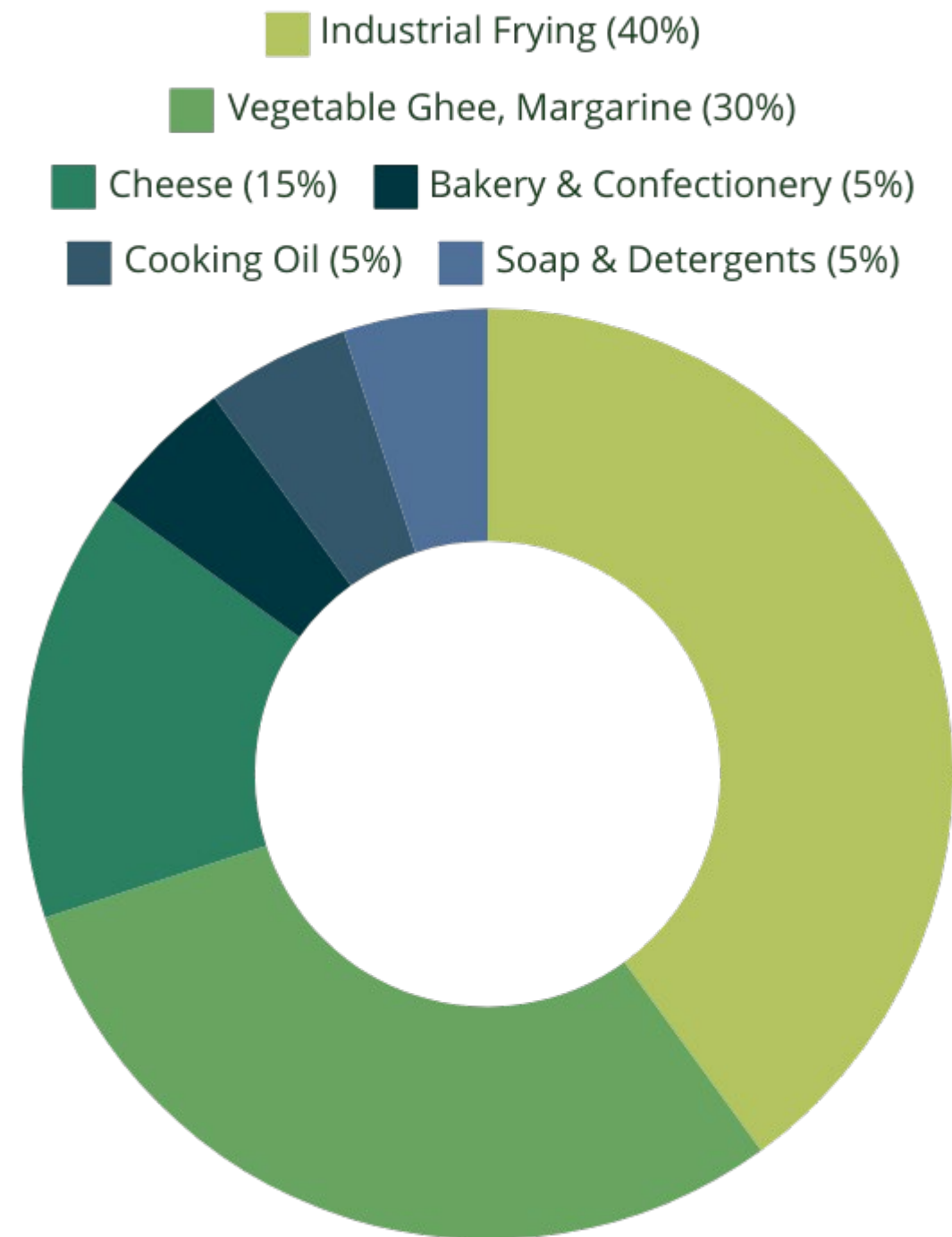
10/ Egypt Oils & Fats Imports



11/ Egypt Oils & Fats Consumption



12/ Egypt Usage of Palm Oil By Sector



13/ Why Choose Malaysian Palm Oil?

- **Affordability:** Malaysian palm oil is one of the most cost-effective vegetable oils on the market.
- **Versatility:** Palm oil is a highly versatile product. Due to its natural properties, it can be used in a wide range of food applications.
- **Year-Round Availability:** Unlike some other vegetable oils, palm oil is a perennial crop.
- **Nutritional Value:** Palm oil is naturally rich in vitamins E and A, as well as coenzyme Q10, which have antioxidant properties.
- **Sustainability Efforts:** Malaysia is firmly committed to implementing competent agricultural practices through certifications like the Malaysian Sustainable Palm Oil (MSPO), which focuses on responsible production methods.



MPOC Egypt

Thanks

Lamyaa El Enany