



Oil & Fat Industry in Kazakhstan & Uzbekistan Current Situation

«Kazakhstan Oil & Fat Union» Association
Accredited in National Chamber of Entrepreneurs
«ATAMEKEN»
2021

Eurasian Economic Union

- 187 mln Population
- >20 mln square km of land
- >6,8 mln ton oil & Gas consumption / year
- + 34 mln Uzbekistan Population (Supervisory Member of EAEU)



Technical Regulation of Oil & Fat Industry

- TR CU 021/2011 On Food Safety (Horizontal)
- TR CU 024/2011 On the Safety of Oil and Fat Products (Vertical)
- TR CU 033/2011 On the Safety Milk and Dairy Products (Vertical)
- TR CU 022/2011 Food products in Terms of their Labeling (Horizontal)
- Uniform Sanitary Requirements of EAEU

MTK 238



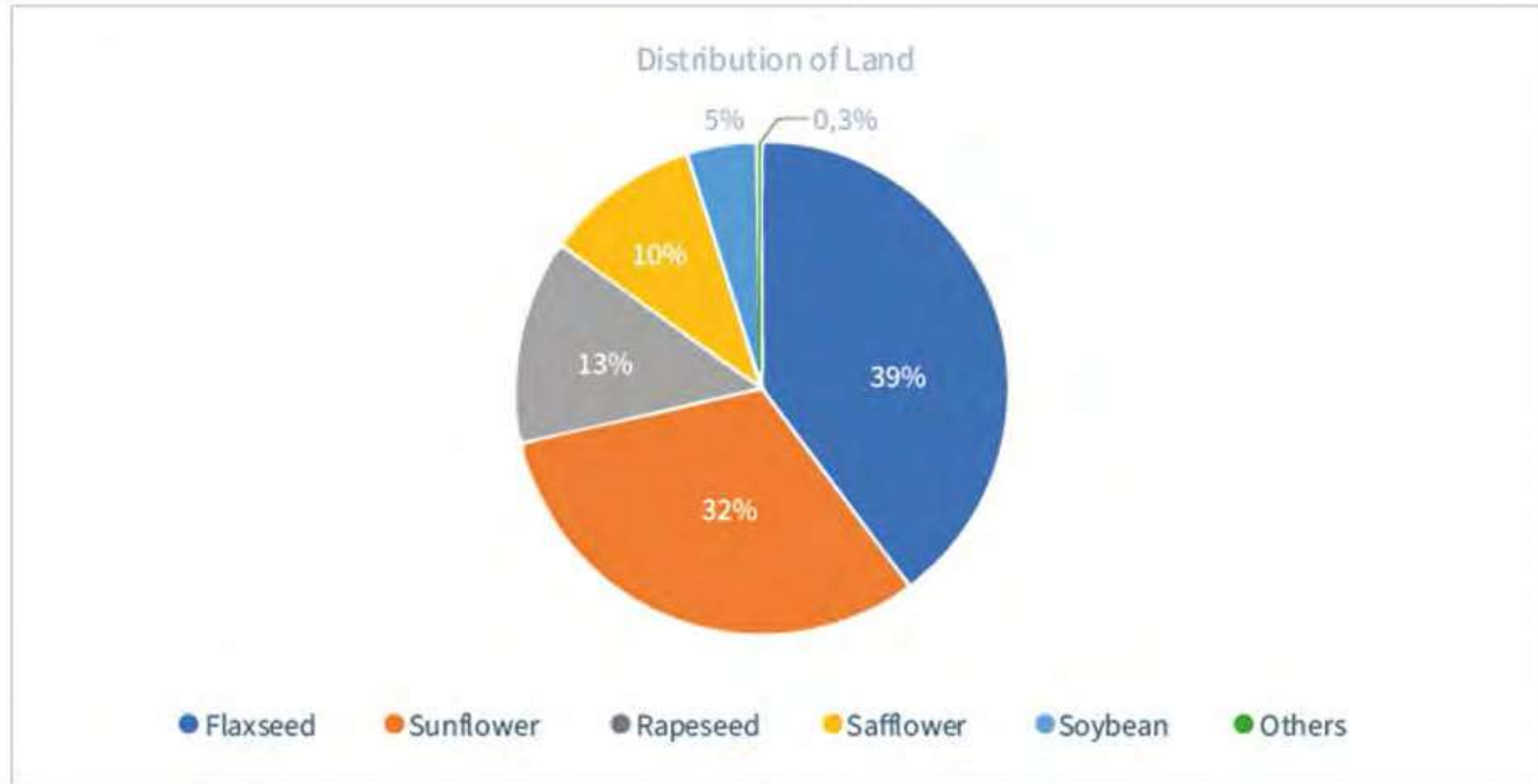
ЕАЭС Евразийский
экономический
союз



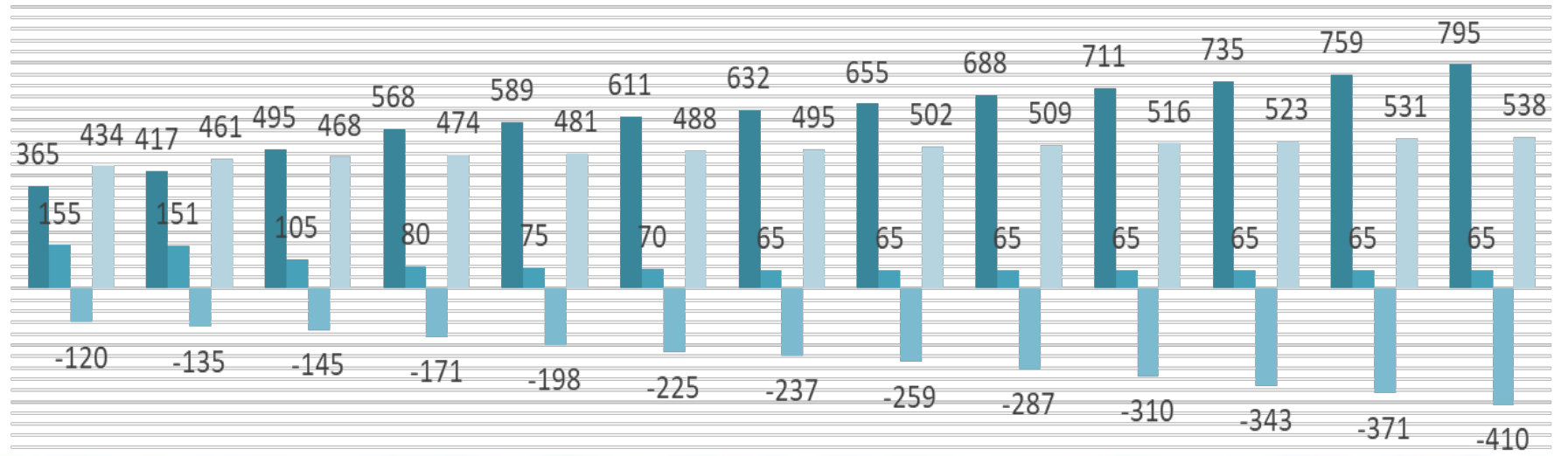
Key factors for the successful development of the fat and oil industry in the Republic of Kazakhstan as Main Supplier of Uzbekistan

- High share of imported vegetable oils
- Free capacities for oil refineries
- Agricultural land resources
- Export potential of fat and oil products in the markets of Central Asia and China
- Export potential of organic fat and oil products in European markets
- Development of animal husbandry in the Republic of Kazakhstan
- Increased global demand for fat, oil and protein foods

Distribution of Land by Oilseeds Cultivation

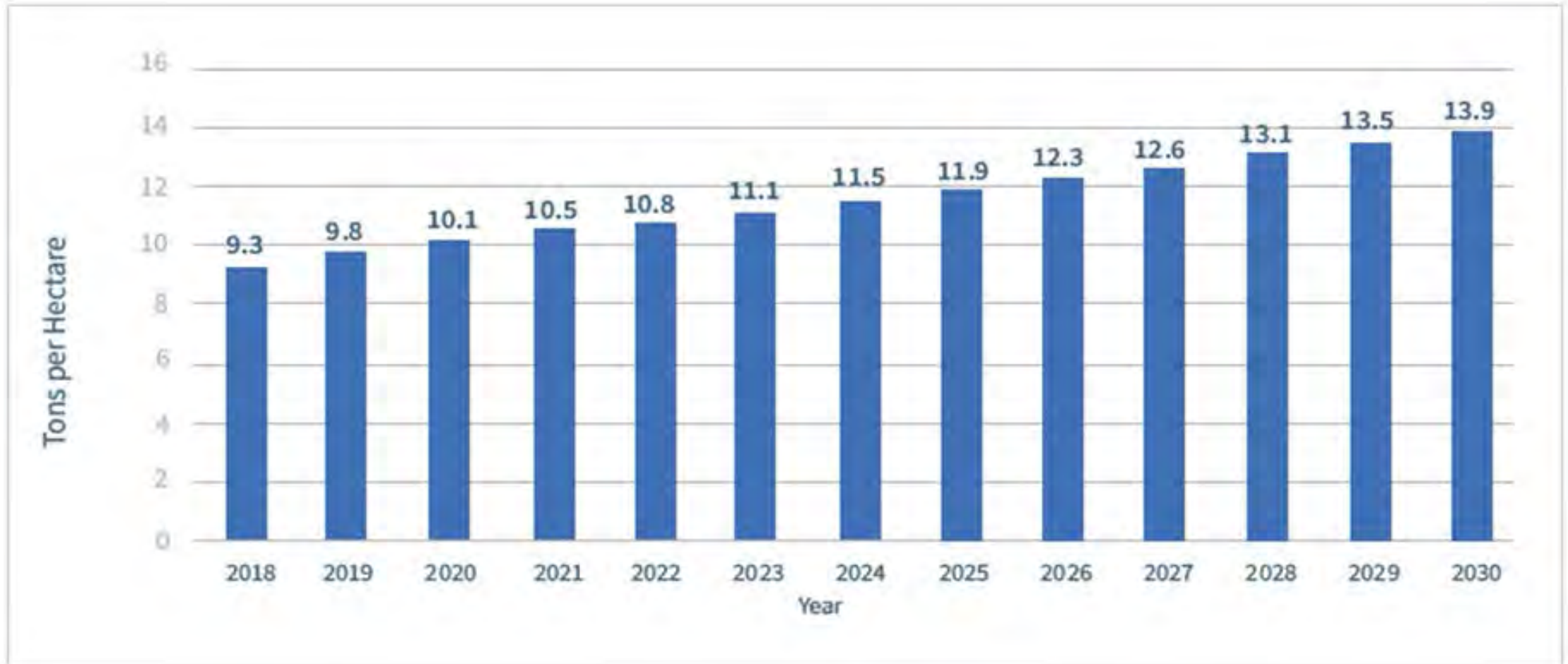


Forecasts Balance for Vegetable Oils during the Period 2020-2030 (in Tons (Thousands))



Year	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Production	365	417	495	568	589	611	632	655	688	711	735	759	795
Import	165	151	105	80	80	75	70	65	65	65	65	65	65
Export	120	135	145	171	198	225	237	259	287	310	343	371	410
Internal consumption	434	461	468	474	481	488	495	502	509	516	523	531	538

Forecasts for Oilseeds Production per Hectare for the Period 2020-2030



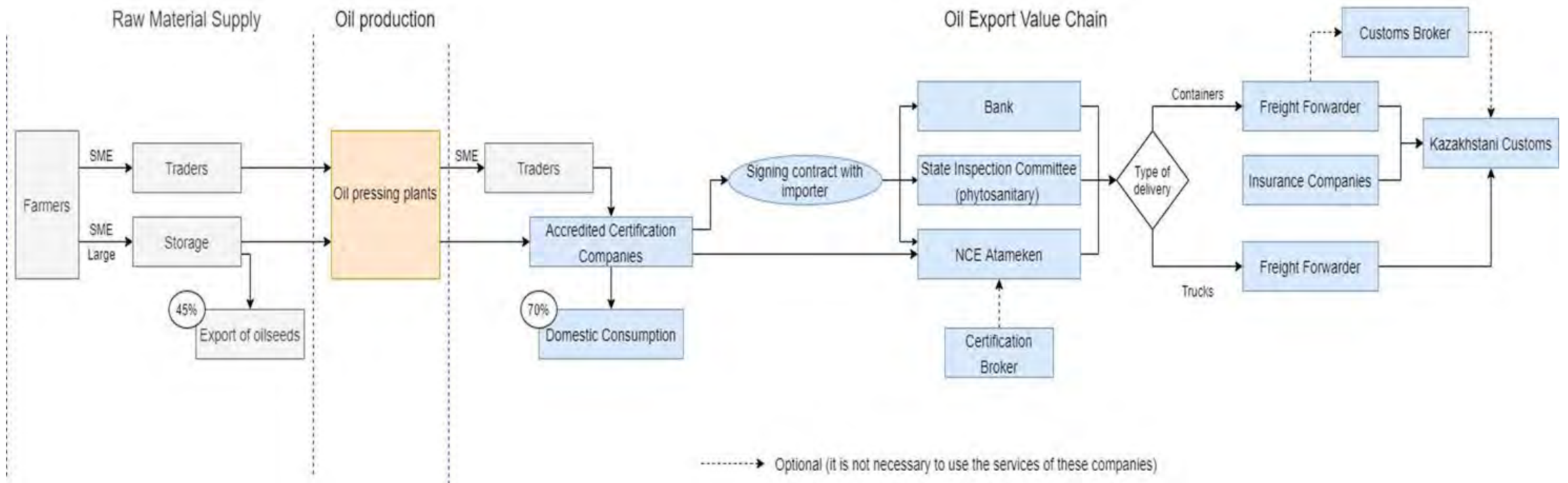
Value, Volume and Share of KZ's Oilseeds Export by Countries 2019

Importers	Trade Value (in USD (Thousands))	Tons	Share in KZ's Export (as a Percentage)
China	94,489	62,821	22.3
Belgium	91,270	260,373	21.5
Uzbekistan	82,039	286,511	19.4
Poland	29,321	85,367	6.9
Russian Federation	21,793	54,551	5.1
Mongolia	21,460	48,380	5.1
Afghanistan	16,364	48,844	3.9
Turkey	15,971	37,784	3.8
Germany	13,691	34,382	3.2

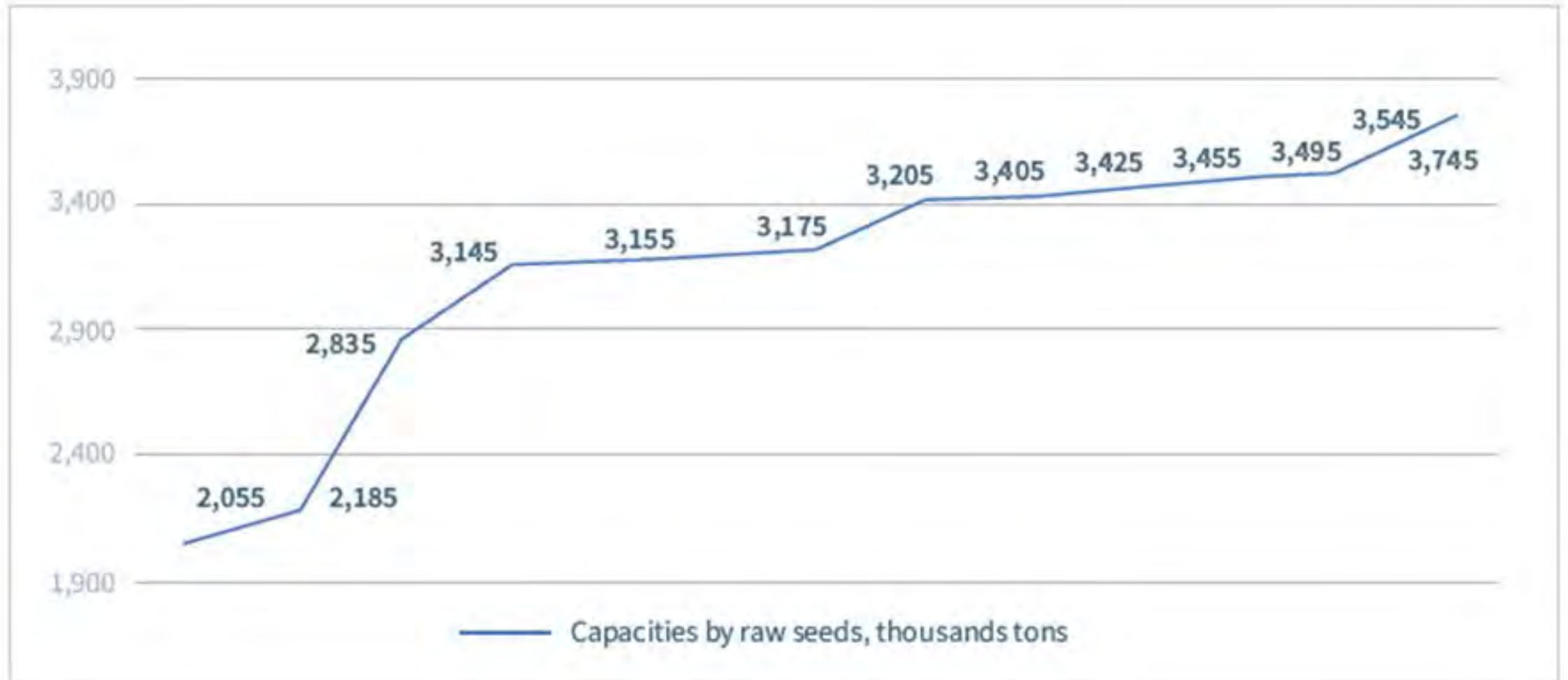
Value, Volume and Share of KZ's Vegetable Oil Export, by Country (2019)

Importers	Trade Value (in USD (Thousands))	Tons	Share in KZ's Export (as a Percentage)
China	99,666	132,990	63.6
Uzbekistan	30,357	40,850	19.4
Tajikistan	12,783	18,019	8.2
Kyrgyzstan	8,584	9,120	5.5
Afghanistan	2,871	3,425	1.8
Islamic Republic of Iran	982	1,224	0.6
Germany	501	395	0.3
Netherlands	387	314	0.2
Russian Federation	294	482	0.2

The whole Value chain of the Oilseeds and Vegetable oils export



Forecasts of Oil Production Capacities for the Period 2018-2030 (in Tons (Thousands))



Falsified Dairy & Fat Products



- Discriminate Palm Oil
- Discriminate Dairy & Confectionery Products
- Great topic for Political Manipulations, Populism Statements & Fake human health concern
- Reduce temps of Trade, Production and Development
- Raise the level of Knowledge for politicians and medicine
- Enlarge the control of final products by taking analysis directly from the shelf
- Clear all Falsified Products from the shelf
- Understand that problem not Palm oil but Fraud

Labeling of Oil & Fat Products

Questions

- inexpediency of the proposal of the Republic of Belarus regarding the decoding of all oils in the composition of products

- lack of methods for control and identification of vegetable oils by fatty acid composition
- high packaging costs for producers of raw materials and finished products

- Why we do not decode animal fats? Russian Federation & Belarus will lose all markets
- European Regulations ask for decoding only allergic components

We are Against

Contaminants

- GE
- 3 MCPD

Trans Fatty Acids in Fat & Dairy products

- **Industrial Trans Fatty Acids**

- Produced hydrogenation of liquid vegetable oils
- Very harmful for human increasing by 1 % can cause heart diseases risks by 10%
- in world practice are often taken into account



- **Neutral Trans Fatty Acids**

- Produced by Ruminants
- Harmless also sometimes useful as anticarcinogenic
- in world practice are not taken into account
- **Uzbekistan**
- Passes to Trans free technologies
- General consumption of Tropical oils will be increased at least 30% in 2 years.

Thanks for Attention

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