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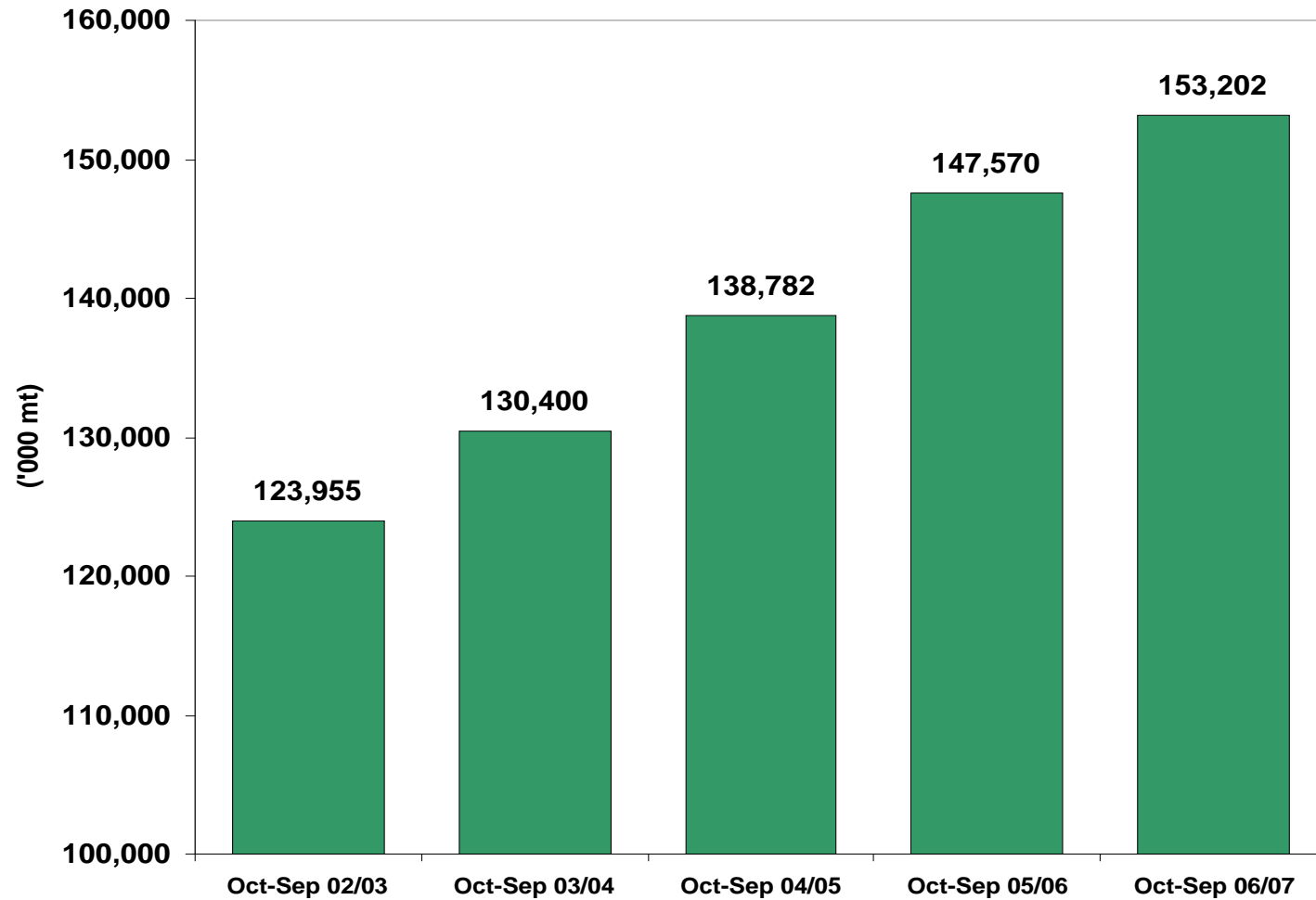
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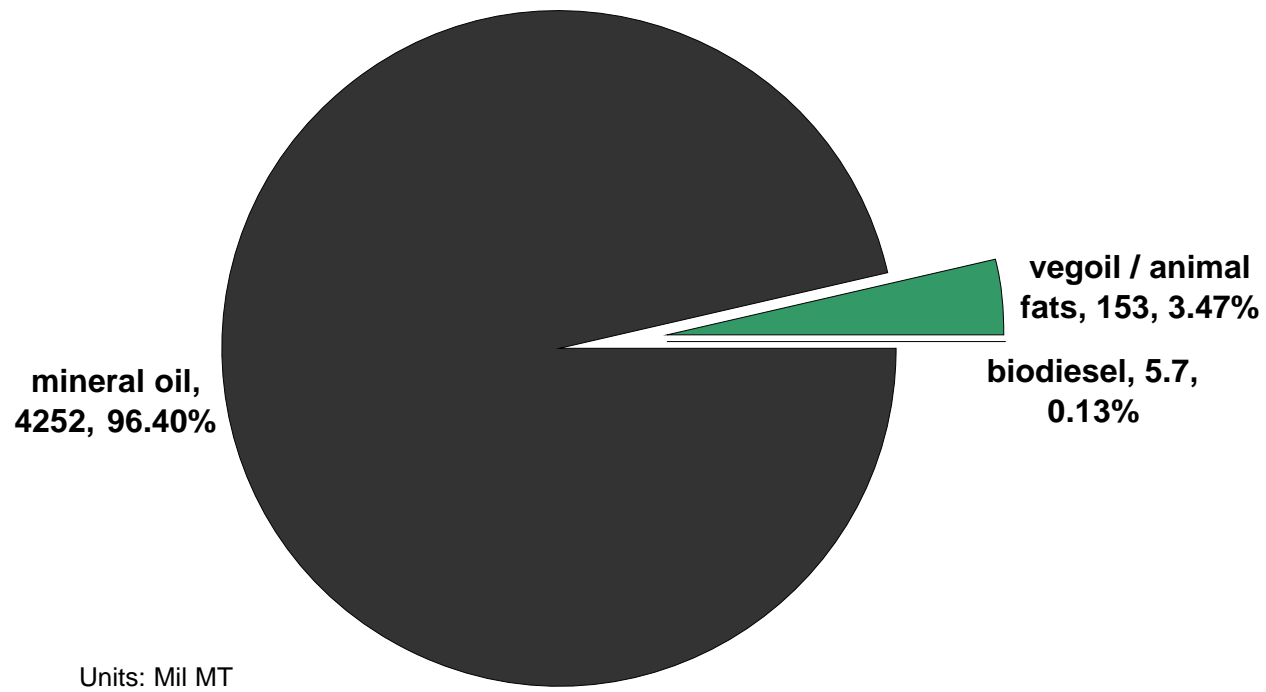
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# World Vegoils & Animal Fats Production



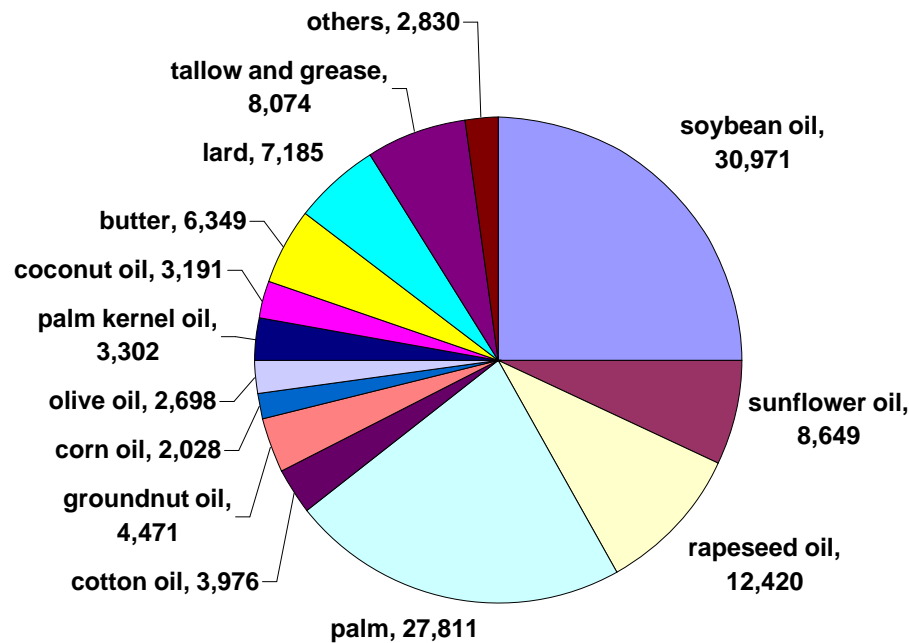
# Market Comparison: Mineral Oil vs. Vegoil / Animal Fats



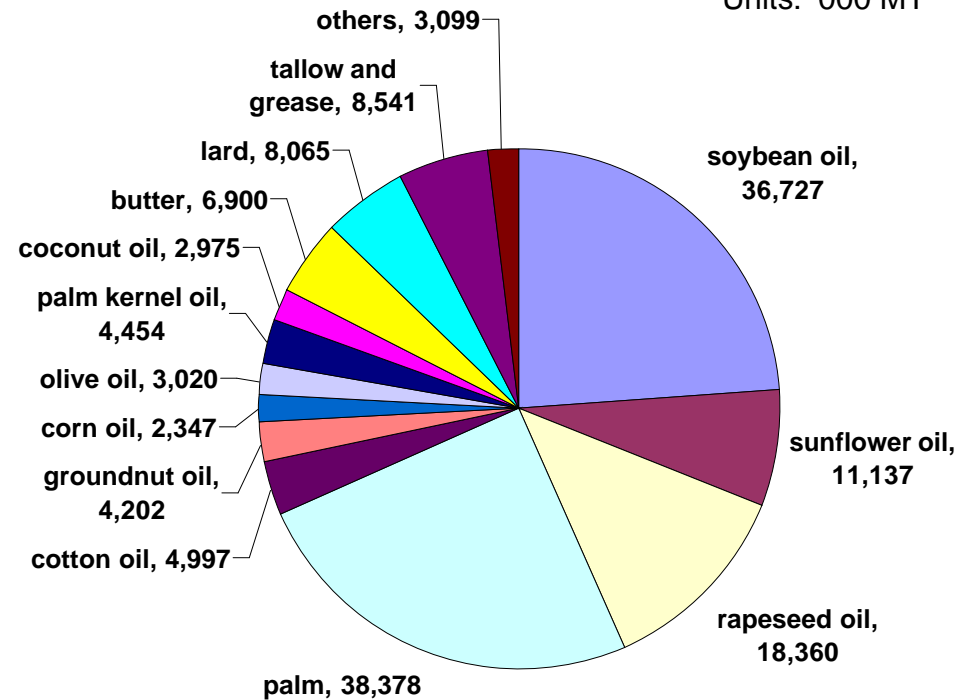
- Veg Oils and Biodiesel are more of an additive than a major blend component.

# World Vegoil Production 2002/03 & 2006/07

Units: '000 MT

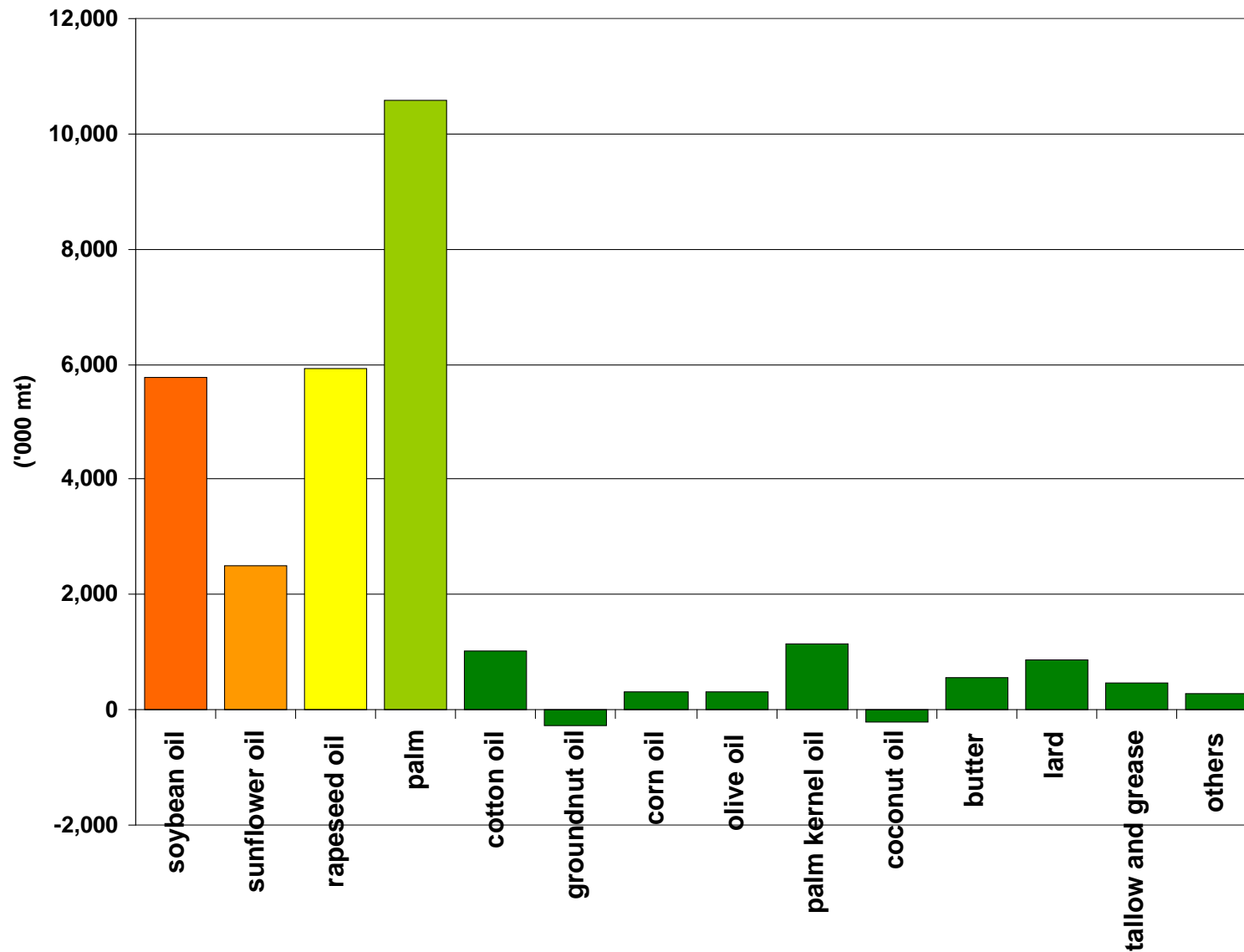


2002 / 2003



2006 / 2007

# World Production Growth 2006/07 vs. 2002/03

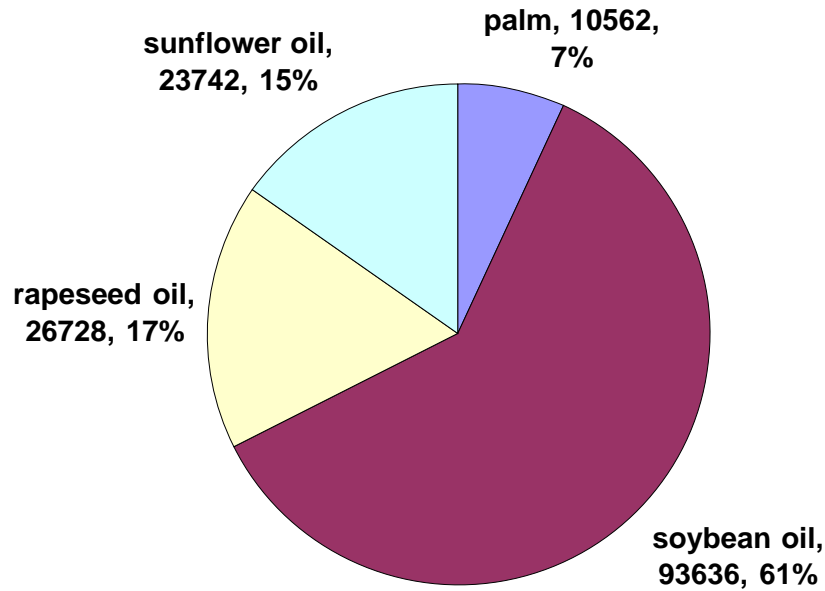


- The large scale crops are also the ones showing significant rates of growth.
- Our business is firmly in the Soy, Rape and Palm world

# Vegoils Planted Area vs. Production

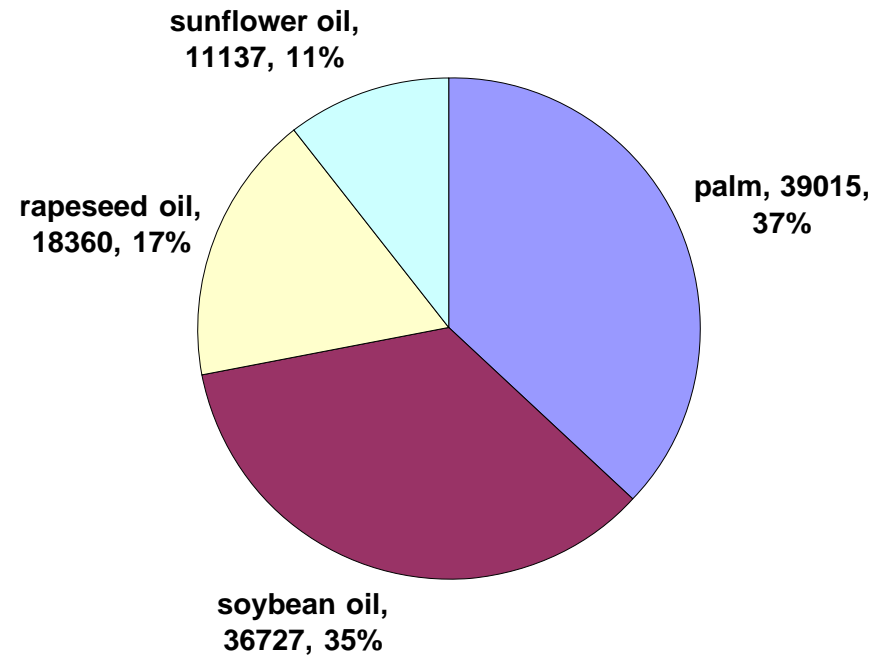
## Planted Area

000's Hectares



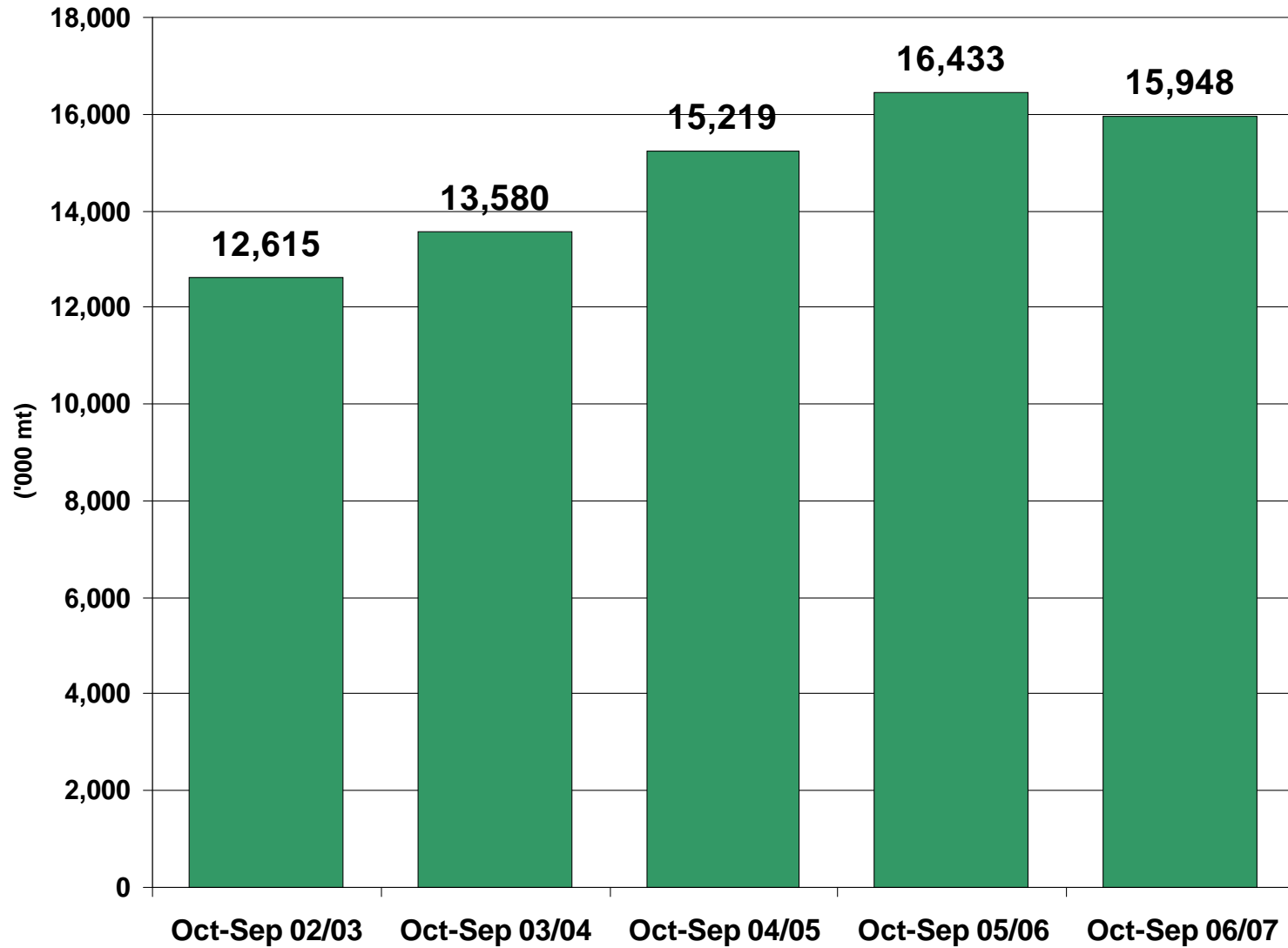
## Annual Production

000's MT



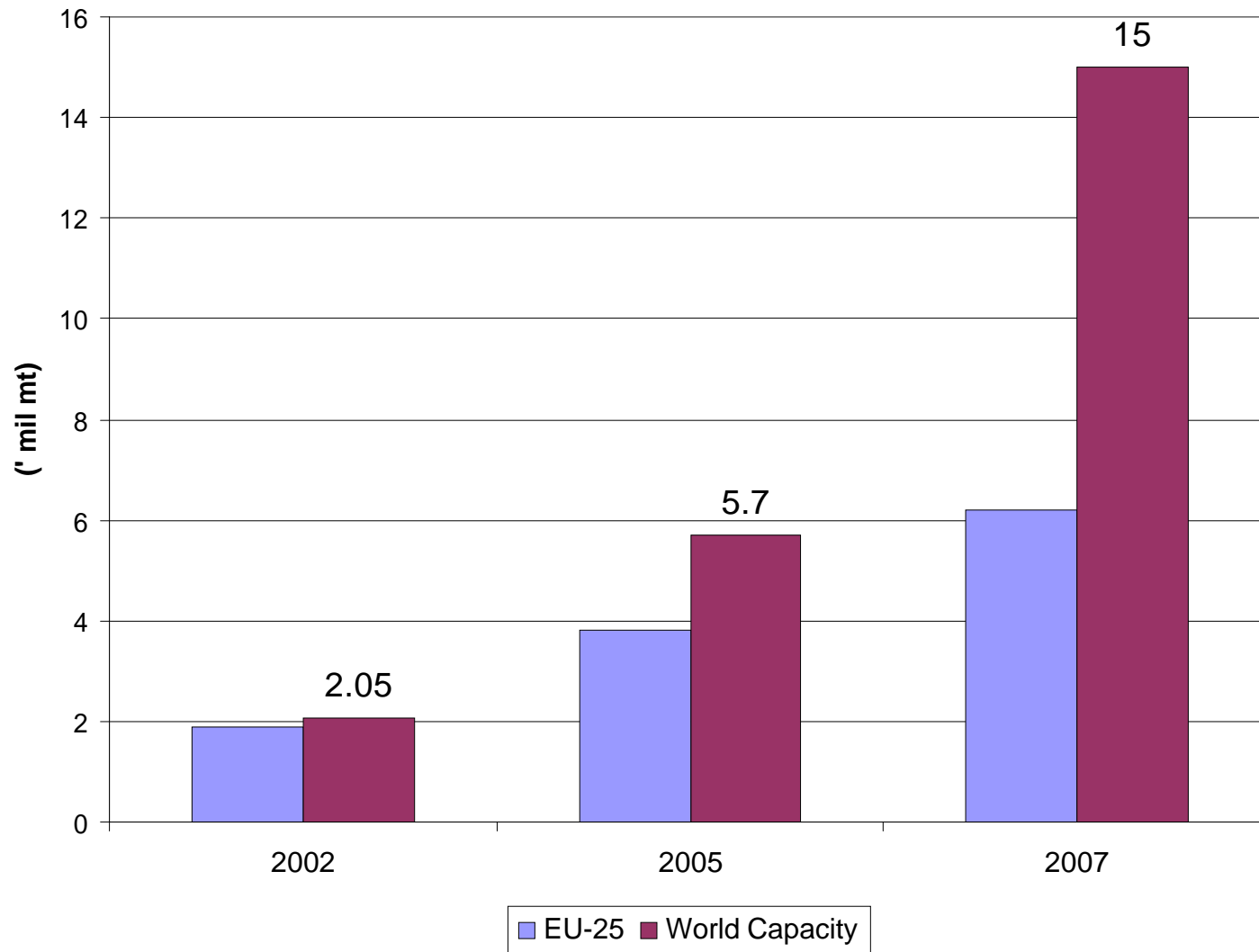
- In terms of production and energy efficiency for veg oil, Palm is by far the most superior crop.
- In a protein deficient world, soy is an equally important crop.

## World Vegoil / Animal fats Carryover Stock



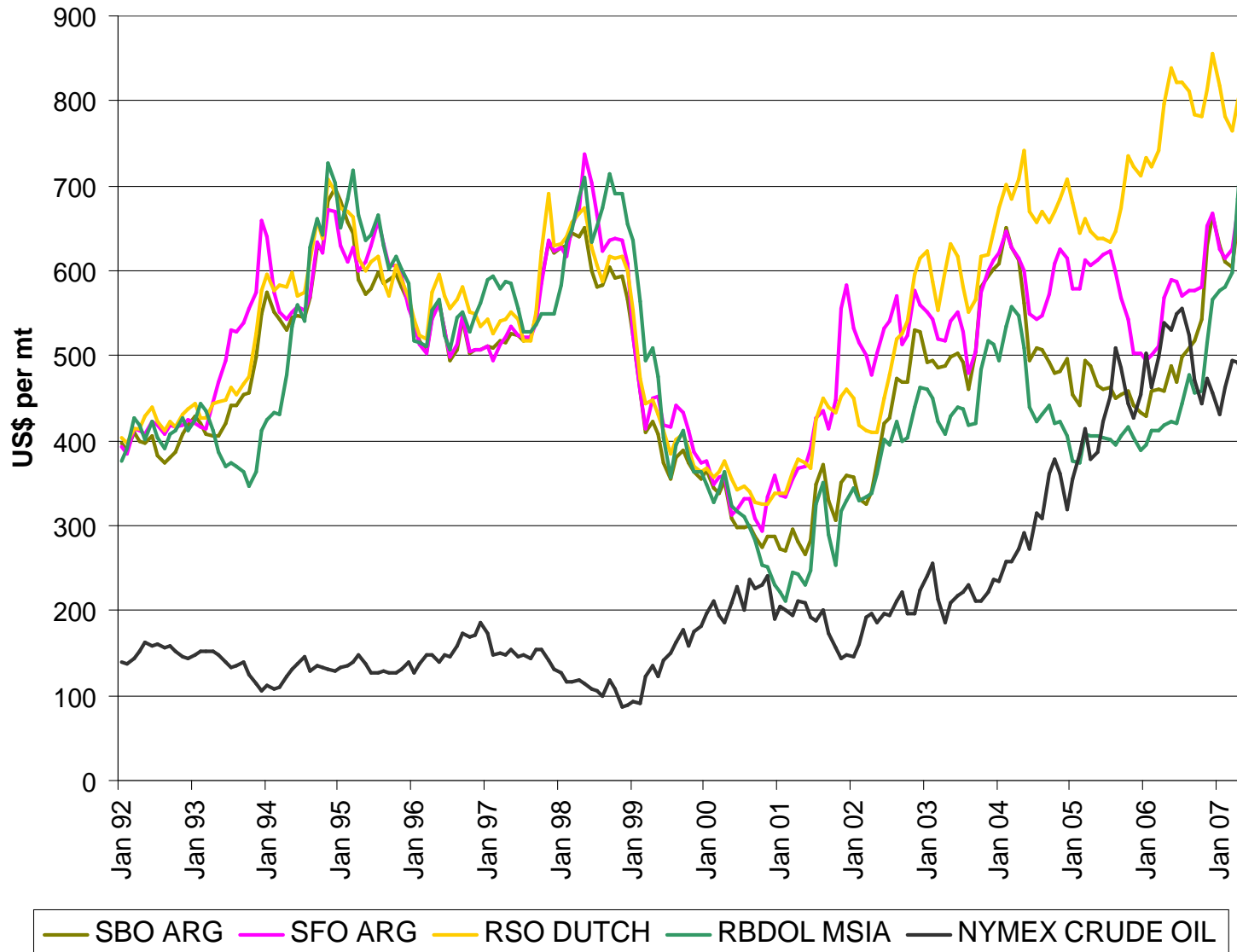
- Our carry over stocks will define what we have as available feedstock over food and oleochemicals (established uses)

# Biodiesel Capacity



- We may have reached a critical point in terms of global capacity for biodiesel.
- The carryover stock vs. useable capacity crunch is maturing this business at warp speed.
- Efficient systems, low processing costs, integration of origination and supply chains, will be key determining factors for success.

# Monthly Oil Prices



- The business remains a simple arbitrage of veg oils and gas oil.
- An ability to manage this arbitrage, coupled with highly efficient production and distribution systems will determine the good investments from the bad.

## End / Questions



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