

# Raw material quality and availability – Impact on input costs



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Nutreco

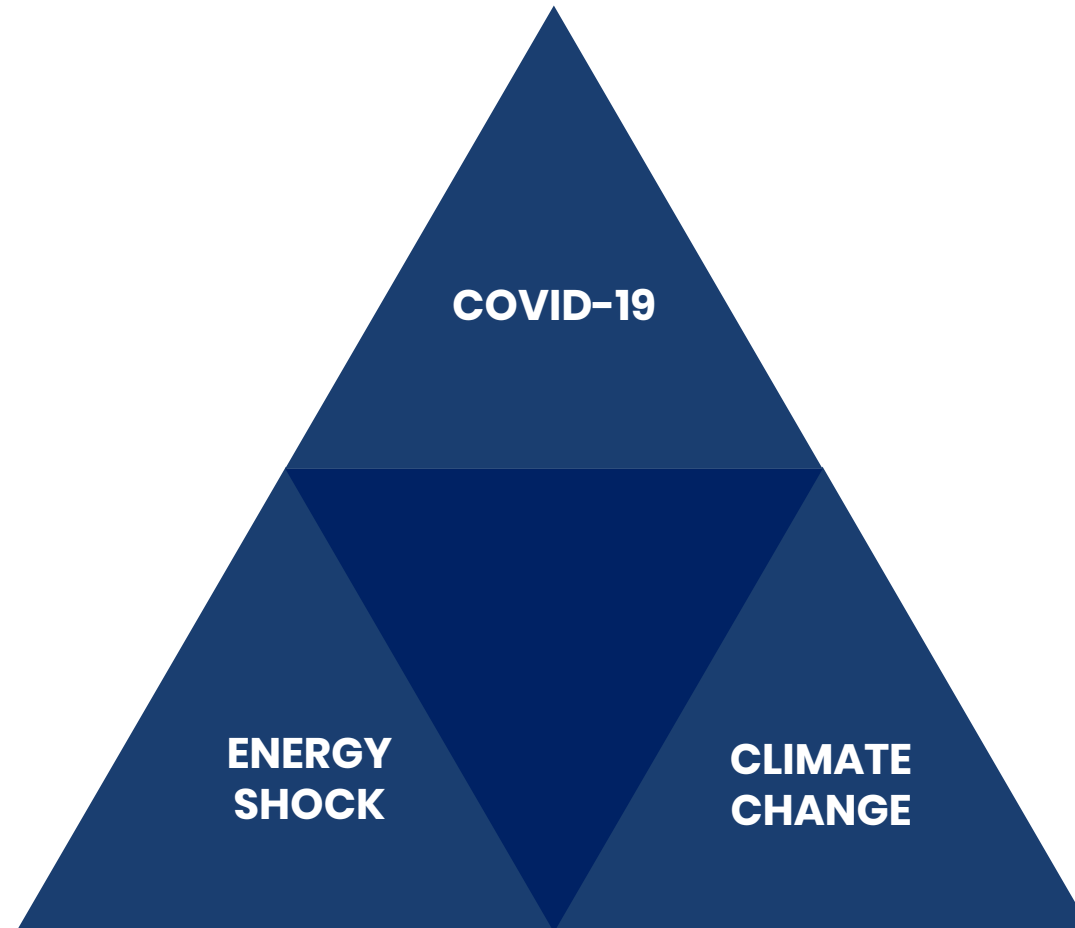


**AVAILABLE –  
at the right  
price, period  
and place**

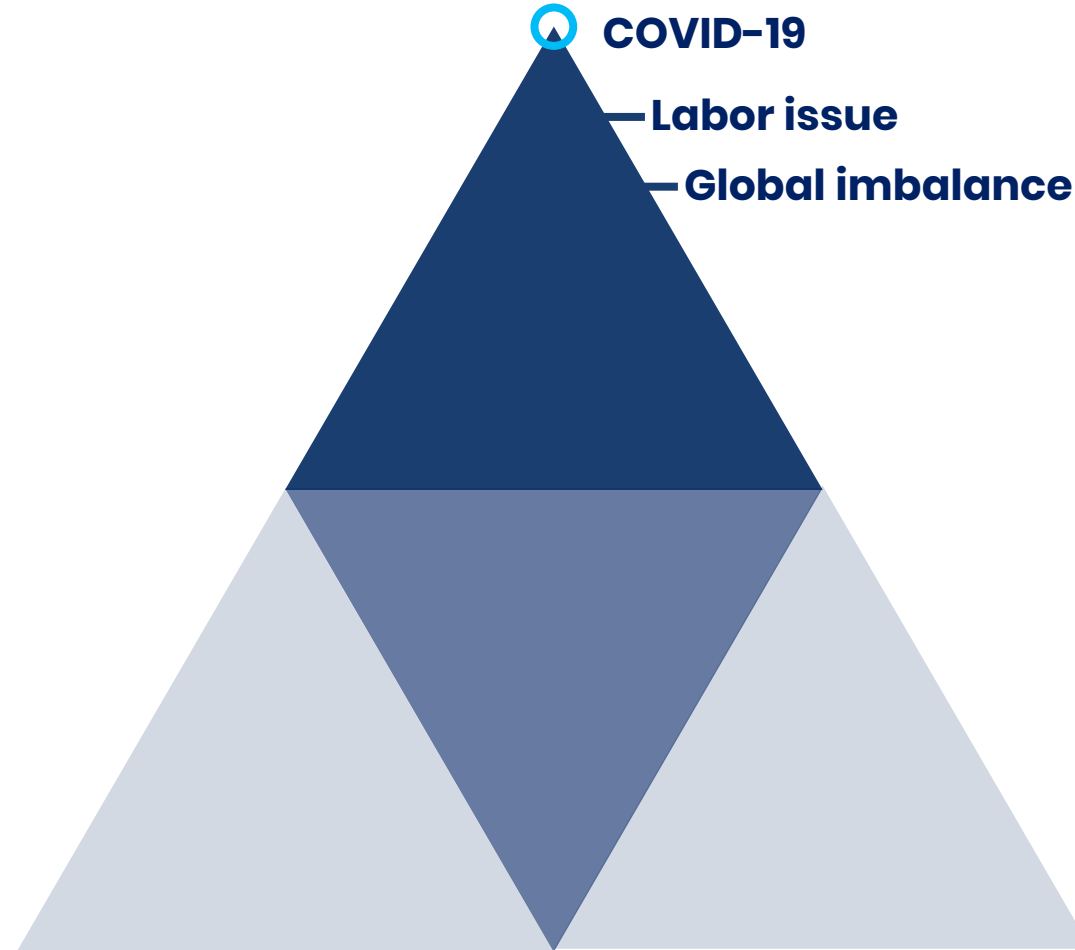


**FUNCTIONAL –  
with the right  
quality and  
lowest impact**

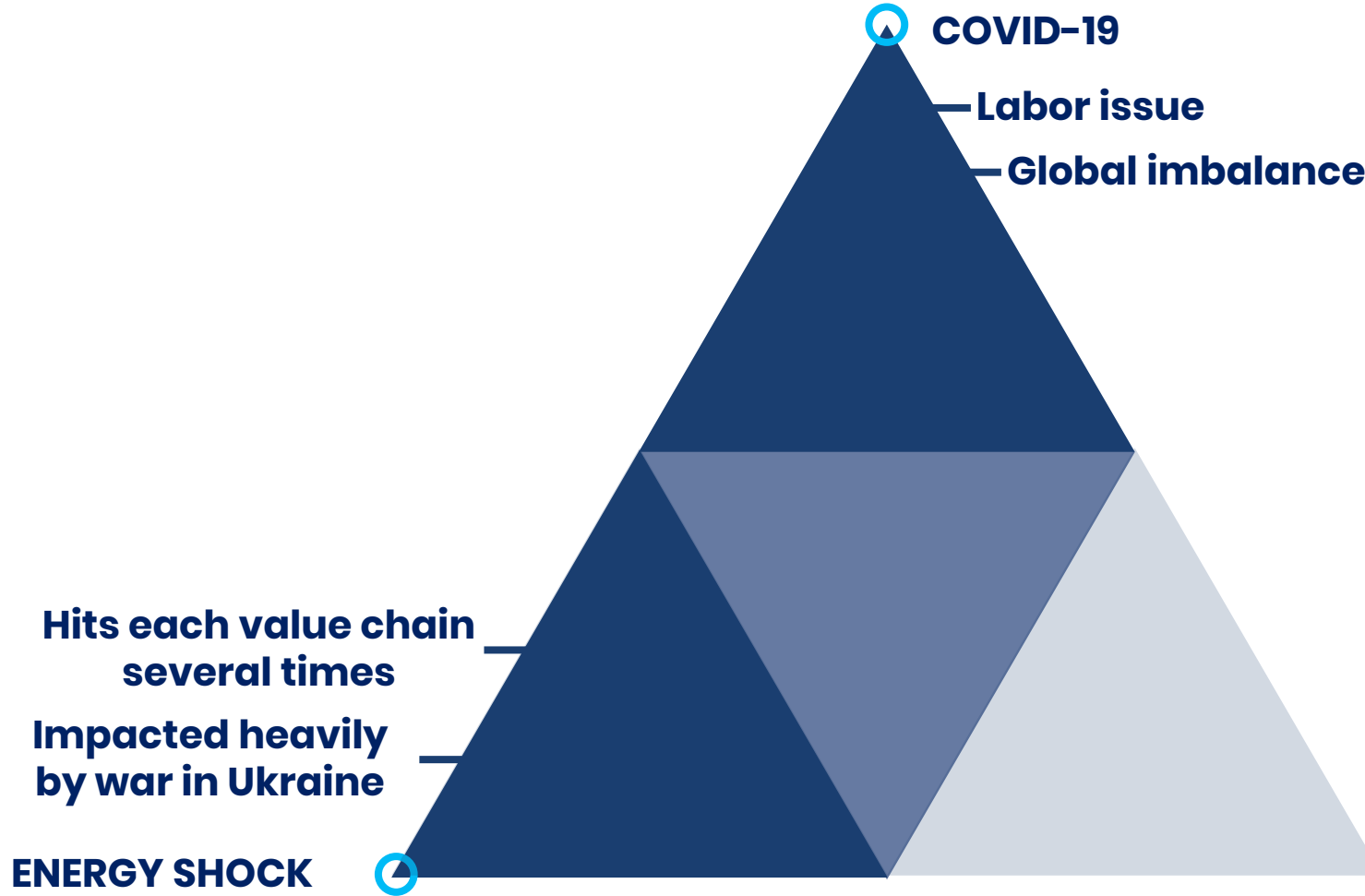
# Availability of Feed Ingredients – What happened?



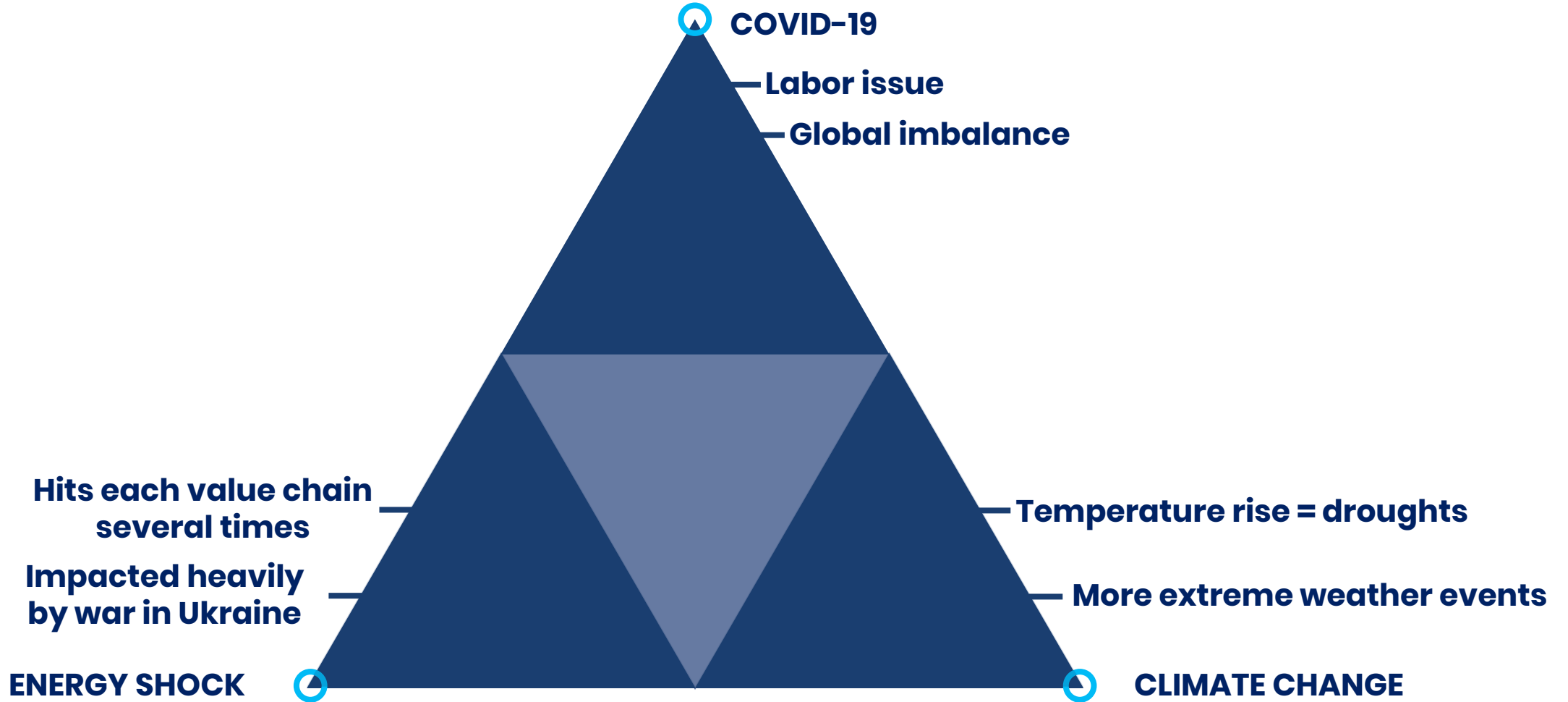
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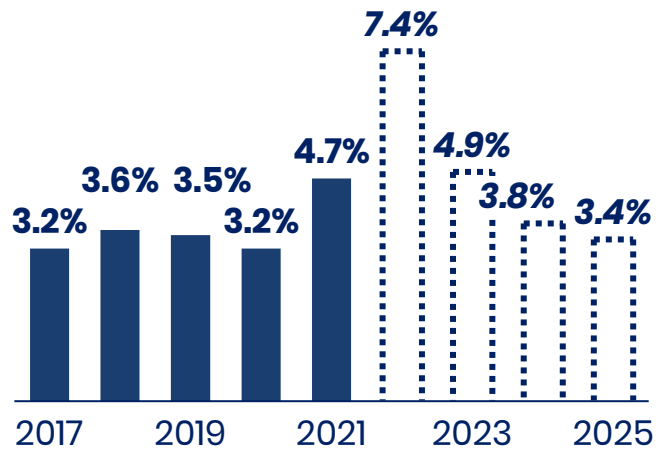
# Availability of Feed Ingredients – What happened?



# Availability of Feed Ingredients – Uncertainty everywhere

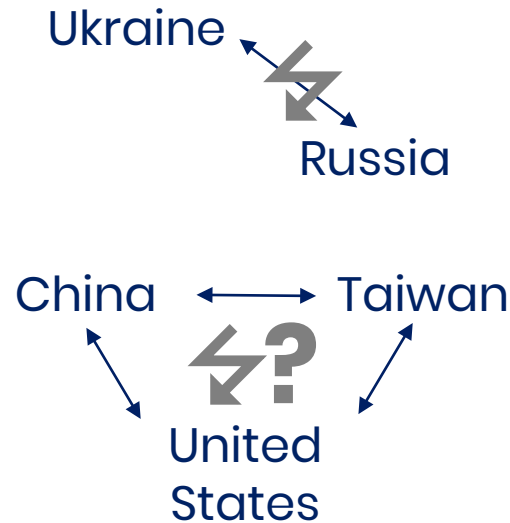
## The Economy

**Global inflation rates**  
year-on-year



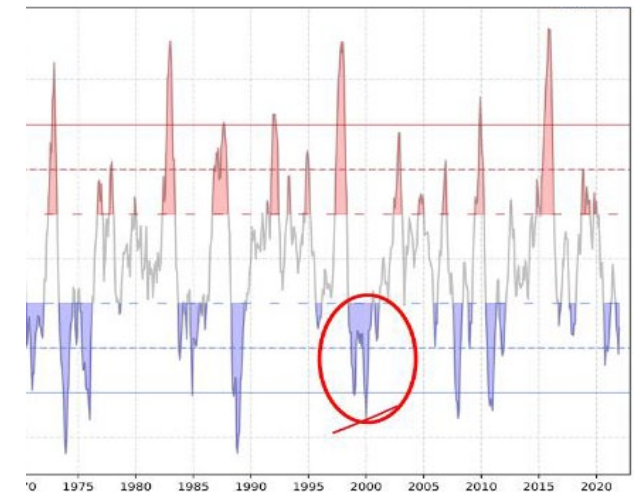
Source: Statista

## Geopolitics



## The weather

*First since 2000 to have three La Nina's in a row*



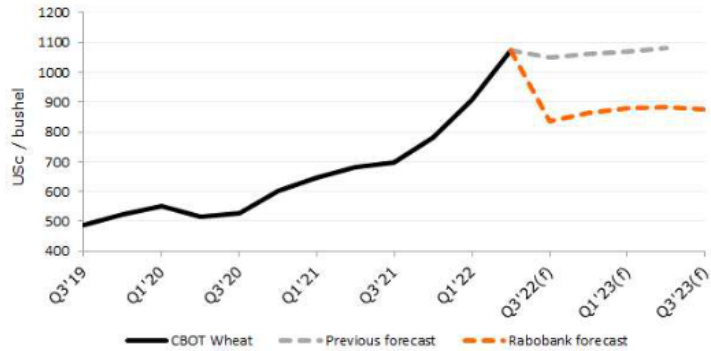
*And let's not forget export bans, logistics issues, currency changes ..*

# Feed Ingredients – Where are markets moving?



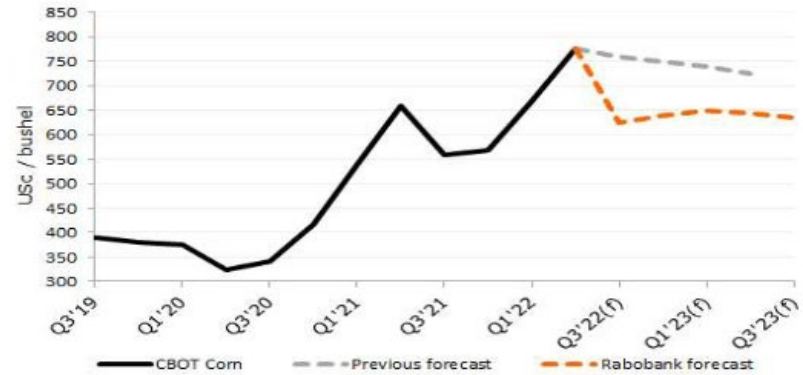
## Wheat

unit	Q4'21	Q1'22	Q2'22	Q3'22f	Q4'22f	Q1'23f	Q2'23f	Q3'23f
CBOT USc/bu	781	905	1073	835	865	880	885	875
Matif EUR/mt	284	311	410	352	345	342	320	310

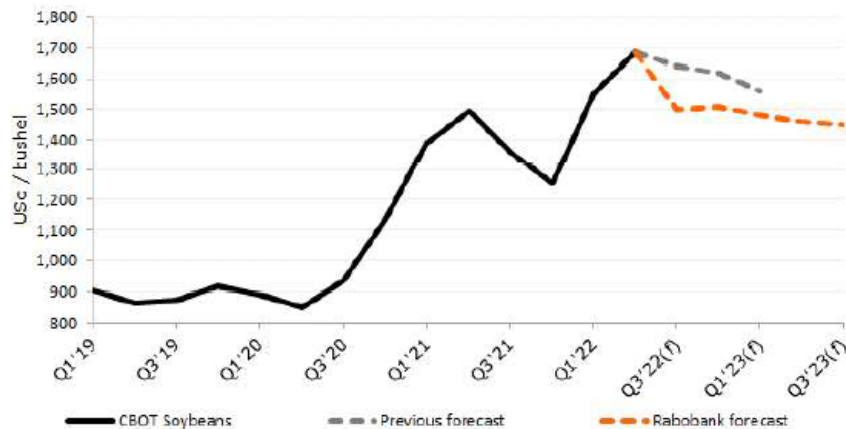


## Corn

Unit	Q4'21	Q1'22	Q2'22	Q3'22f	Q4'22f	Q1'23f	Q2'23f	Q3'23f
Corn USc/bu	567	670	777	625	640	650	645	635

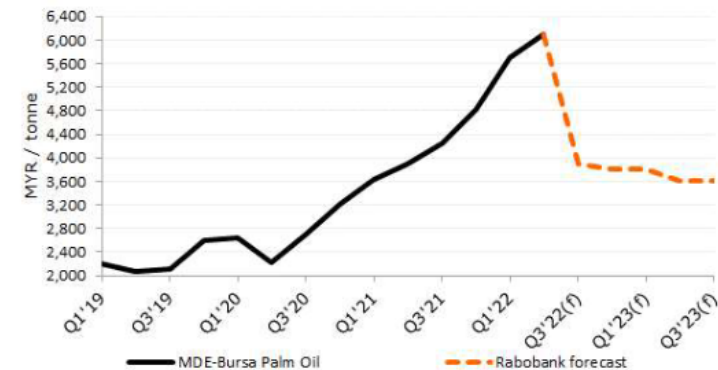


## Soy



## Palm

Palm Oil Unit	Q4'21	Q1'22	Q2'22	Q3'22(f)	Q4'22(f)	Q1'23(f)	Q2'23(f)	Q3'23(f)
MYR/tonne	4,811	5,691	6,089	3,900	3,800	3,800	3,600	3,600





**AVAILABLE –**  
at the right  
price, period  
and place



**FUNCTIONAL –**  
with the right  
quality and  
lowest impact



**Maintain high quality ingredients**



**Be flexible with setting specifications**



**Ensure supply chain control**



**Be careful with new suppliers/ingredients – check regulatory demands**

## Global greenhouse gas emissions and warming scenarios Our World in Data

– Each pathway comes with uncertainty, marked by the shading from low to high emissions under each scenario.  
– Warming refers to the expected global temperature rise by 2100, relative to pre-industrial temperatures.

Annual global greenhouse gas emissions  
in gigatonnes of carbon dioxide-equivalents

150 Gt

100 Gt

50 Gt

Greenhouse gas emissions  
up to the present

1990 2000 2010 2020 2030 2040 2050 2060 2070 2080 2090 2100

**No climate policies**

4.1 – 4.8 °C

→ expected emissions in a baseline scenario if countries had not implemented climate reduction policies.

**Current policies**

2.5 – 2.9 °C

→ emissions with current climate policies in place result in warming of 2.5 to 2.9°C by 2100.

**Pledges & targets (2.1 °C)**

→ emissions if all countries delivered on reduction pledges result in warming of 2.1°C by 2100.

**2°C pathways**

**1.5°C pathways**

Data source: Climate Action Tracker (based on national policies and pledges as of November 2021).  
OurWorldinData.org – Research and data to make progress against the world's largest problems.

Last updated: April 2022.  
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Source: <https://ourworldindata.org/co2-and-other-greenhouse-gas-emissions>

Global carbon emission

**What is needed is not  
a new equilibrium but  
an actual reduction!**



**Strong  
value chain  
relationships**



**Transparency  
(on logistics, etc.)**



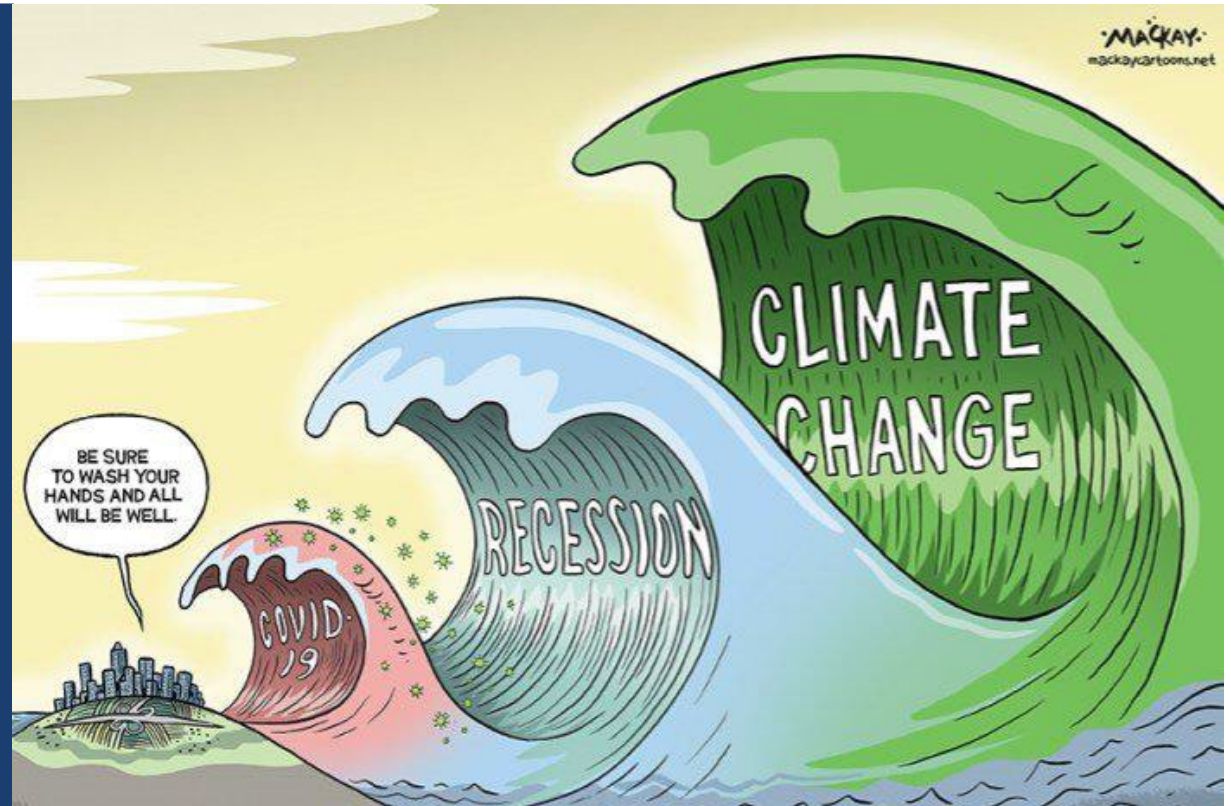
**Local/regional  
sourcing where  
possible**



**Innovation,  
understand real  
needs and  
alternatives**

New normal –  
*Who can tell?*

**Crises will keep coming  
so let's deal with them  
and stay focused on the  
long-term challenges**



**FEED  
TECHNO  
VISION  
2022**



**THANK YOU!**

