



RSPO

Roundtable on Sustainable Palm Oil

RSPO Stakeholder Awareness and Reputation Study

Wave 2: June 2024

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About the study

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Introduction and objectives

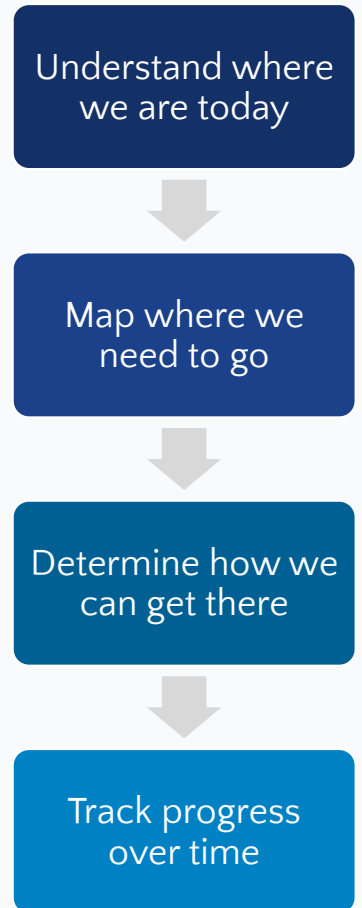
RSPO commissioned global reputation research specialists, Echo Research, to conduct an annual global reputation study across multiple stakeholder audiences.

The objectives of the study are to:

- ✓ Track familiarity, perceptions and reputation of RSPO
- ✓ Track familiarity, perceptions and reputation of RSPO certification
- ✓ Track perceptions of RSPO's communications and stakeholder engagement
- ✓ Provide actionable insight for communications strategy and reputation management.

This is a report of findings from the second annual study conducted between February and June 2024.

It follows the first study carried out in 2023.



A multi-method approach was used to maximise engagement with hard-to-reach audiences.

Online survey

- ❖ 10-minute online survey available in 12 languages
- ❖ Targeting all member and non-member stakeholder categories
- ❖ Fieldwork dates:
 - ❖ Wave 1: 01 February – 10 March 2023
 - ❖ Wave 2: 18 March– 10 June 2024

Telephone interviews

- ❖ 30-minute semi-structured telephone / video conferencing interviews all conducted in English.
- ❖ Targeting ‘hard-to-reach’ audiences: Banks and investors, Academics, research institutions, think tanks, IGOs
- ❖ Fieldwork dates:
 - ❖ Wave 1: 23 January – 15 February 2023
 - ❖ Wave 2: 12 February – 14 March 2024

Wave 2
551 completes via online survey



Wave 2
20 telephone interviews



Profile of participants by stakeholder type and region



WAVE 2 2024: SAMPLE PROFILE		Asia & Pacific	Europe	Latin America & Caribbean	Africa & Middle East	North America	TOTAL
Ordinary	Oil palm growers	52	2	19	3	0	76
	Retailers	2	7	0	0	1	10
	Consumer goods manufacturers	24	80	2	0	31	137
	Palm oil processors & traders	52	35	17	4	13	121
	Banks & investors	4	2	0	0	0	6
	Environmental or nature conservation organisations	7	0	0	0	1	8
	Social or development organisations	1	4	0	0	0	5
Associate	Supply chain associate/supply chain group managers	52	84	4	1	16	157
Affiliate	Individuals/organisations/associations	11	11	5	0	2	29
Other	Academia, research institutions, think tanks	10	7	0	0	1	18
	IGOs	1	2	0	0	1	4
TOTAL PARTICIPANTS		216	234	47	8	66	571

Navigating this report

For analysis purposes we have grouped participants into the following categories.

Stakeholder group

- **Oil palm growers**
- **Supply chain:** Retailers, Consumer goods manufacturers, Palm oil processors & traders, Supply chain associate/supply chain group manager, affiliate individuals/organisations/associations
- **Influencers outside supply chain:** Banks & investors, Environmental or nature conservation organisations, Social or development organisations, Academia/ research institutions/think tanks, IGOs

Membership

- **RSPO members**
- **RSPO non-members**

Region

- **Asia & Pacific**
- **Europe**
- **Latin America & Caribbean**
- **North America**

Note: sample size too small to report on Africa & Middle East separately

Statistical significance

Differences between subgroups have been tested for statistical significance at the 95% confidence level. Significant differences are denoted by the following symbols:

- ▲ ▼ Significantly different compared to the overall total or significantly different wave-on-wave

Perceptions of RSPO

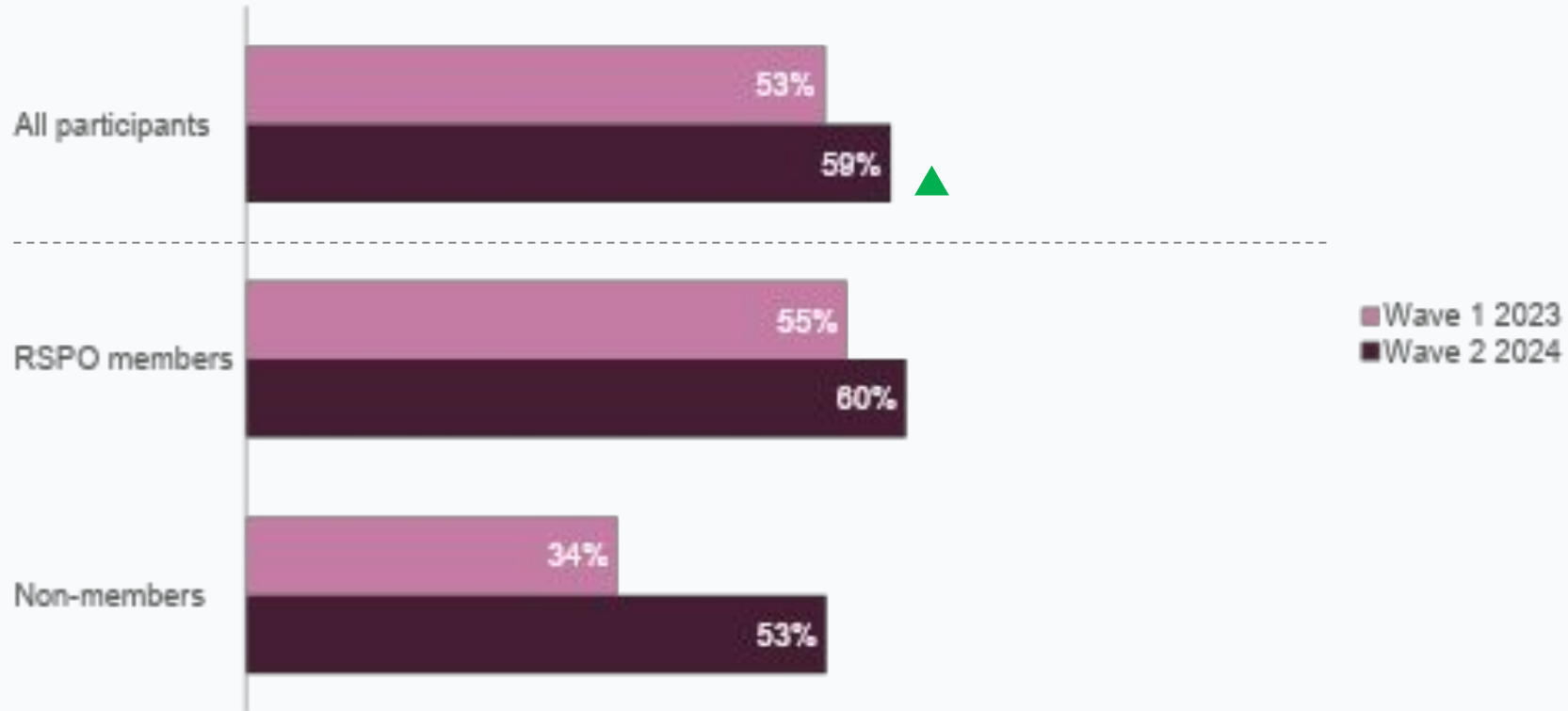
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FAMILIARITY WITH THE ROUNDTABLE ON SUSTAINABLE PALM OIL (RSPO)

The proportion of participants who know RSPO 'very well' is significantly higher than a year ago

% who know RSPO very well – by membership



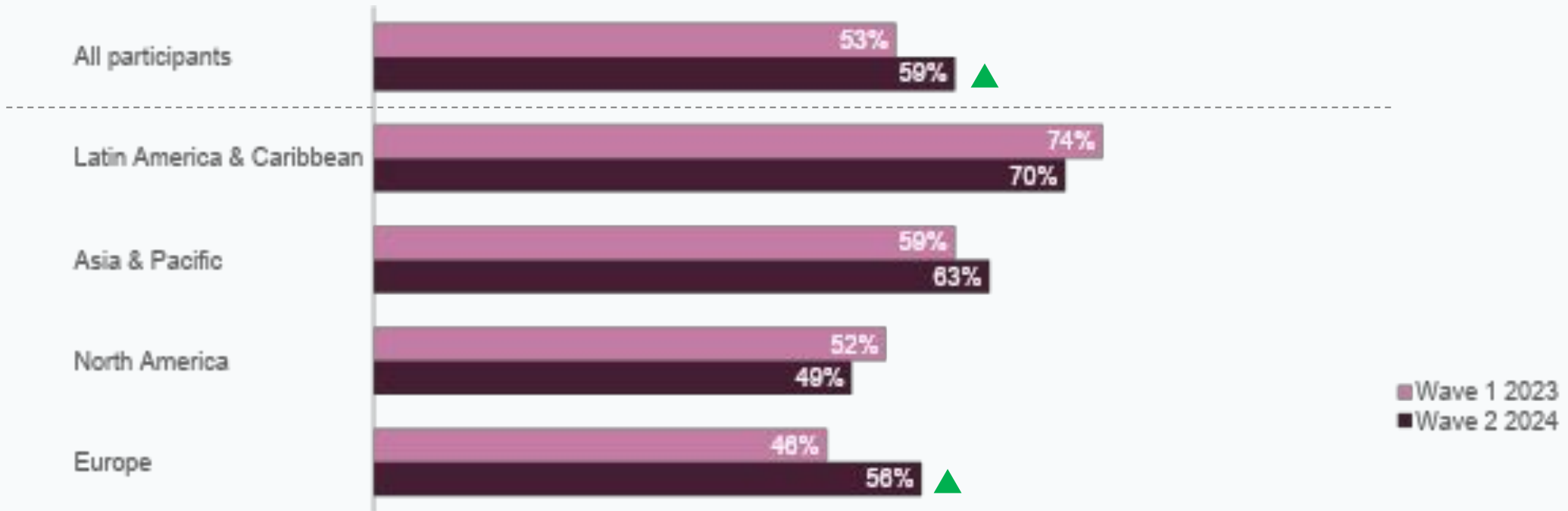
Q. How familiar are you with the Roundtable on Sustainable Palm Oil (RSPO) as an organisation?
Base: All participants; Wave 1 2023 (n=657), Wave 2 2024 (n=571)

▲ ▼ Significantly different between waves

FAMILIARITY WITH THE ROUNDTABLE ON SUSTAINABLE PALM OIL (RSPO)

At a regional level, familiarity with RSPO is highest in Latin America & Caribbean. Familiarity with RSPO in Europe increases year-on-year

% who know RSPO very well - by region



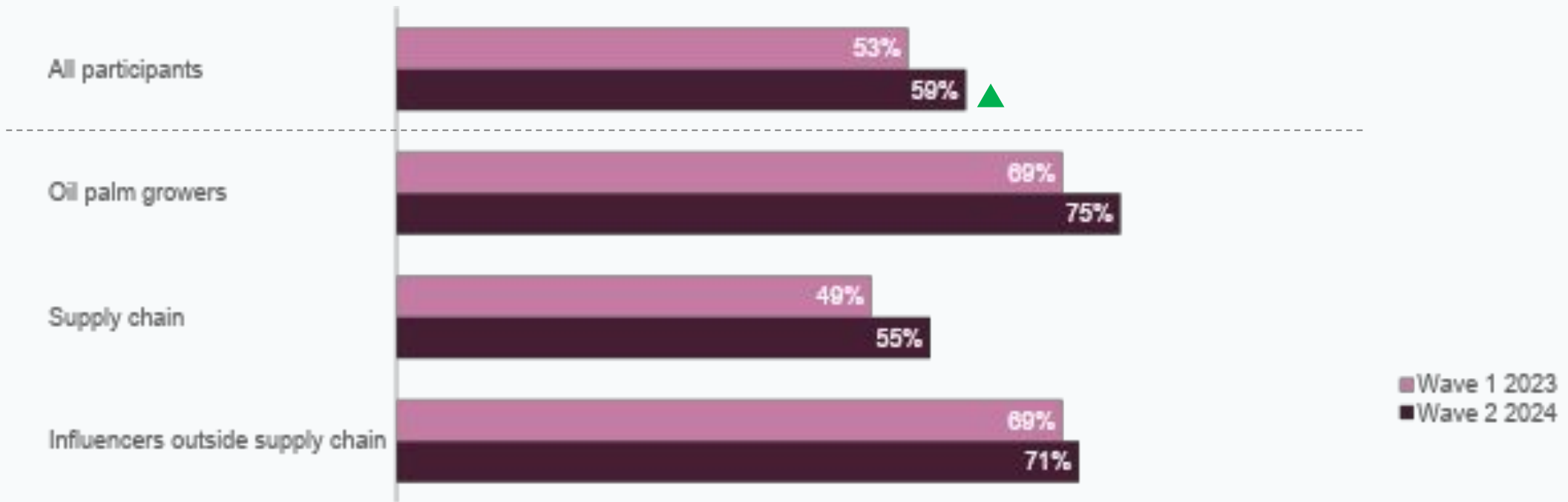
Q. How familiar are you with the Roundtable on Sustainable Palm Oil (RSPO) as an organisation?
Base: All participants; Wave 1 2023 (n=657). Wave 2 2024 (n=571) - Africa & Middle East not shown due to low base size

▲ ▼ Significantly different between waves

FAMILIARITY WITH THE ROUNDTABLE ON SUSTAINABLE PALM OIL (RSPO)

Familiarity with RSPO remains highest among oil palm growers

% who know RSPO very well - by stakeholder group



Q. How familiar are you with the Roundtable on Sustainable Palm Oil (RSPO) as an organisation?
Base: All participants; Wave1 (n=657), Wave 2 2024 (n=571)

▲ ▼ Significantly different between waves

OVERALL REPUTATION OF RSPO

Over three quarters of those familiar with RSPO consider it to have a good or excellent reputation, citing it as the global standard for sustainable palm oil

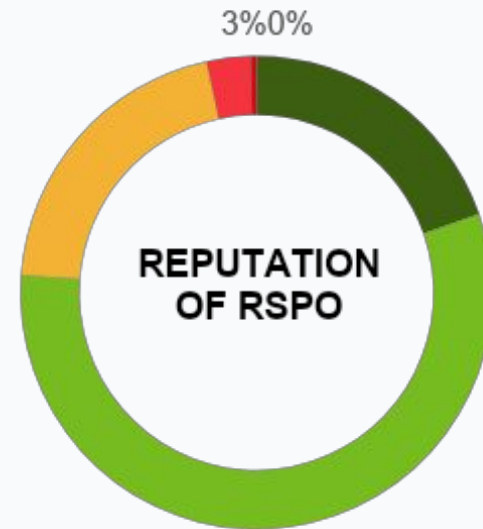
Excellent / good reputation (76%)

- Sustainability / environmental impact
- Global standard and recognition

*“A project that **supports sustainable palm oil production**, benefiting the ecosystem, environment, community, and society.”*
Oil palm grower, Asia Pacific

*“**They are the global standard** around palm oil sustainability in terms of international recognition. It is a benchmark that is globally recognised.”*
Bank / investor, Asia Pacific

*“Currently the **only certification system recognised in the EU** and has good practices for human rights.”*
Consumers goods manufacturer, Europe



- Excellent
- Good
- Neither good nor poor
- Very poor

Neither good nor poor (20%)

- Certification challenges and costs
- Transparency and information sharing

*“I am **not clear on the process to secure the certification** and updates of progress. Very low transparency on the website.”*
Supply chain associate/ manager, Europe

Poor / very poor reputation (3%)

- Market perception and credibility

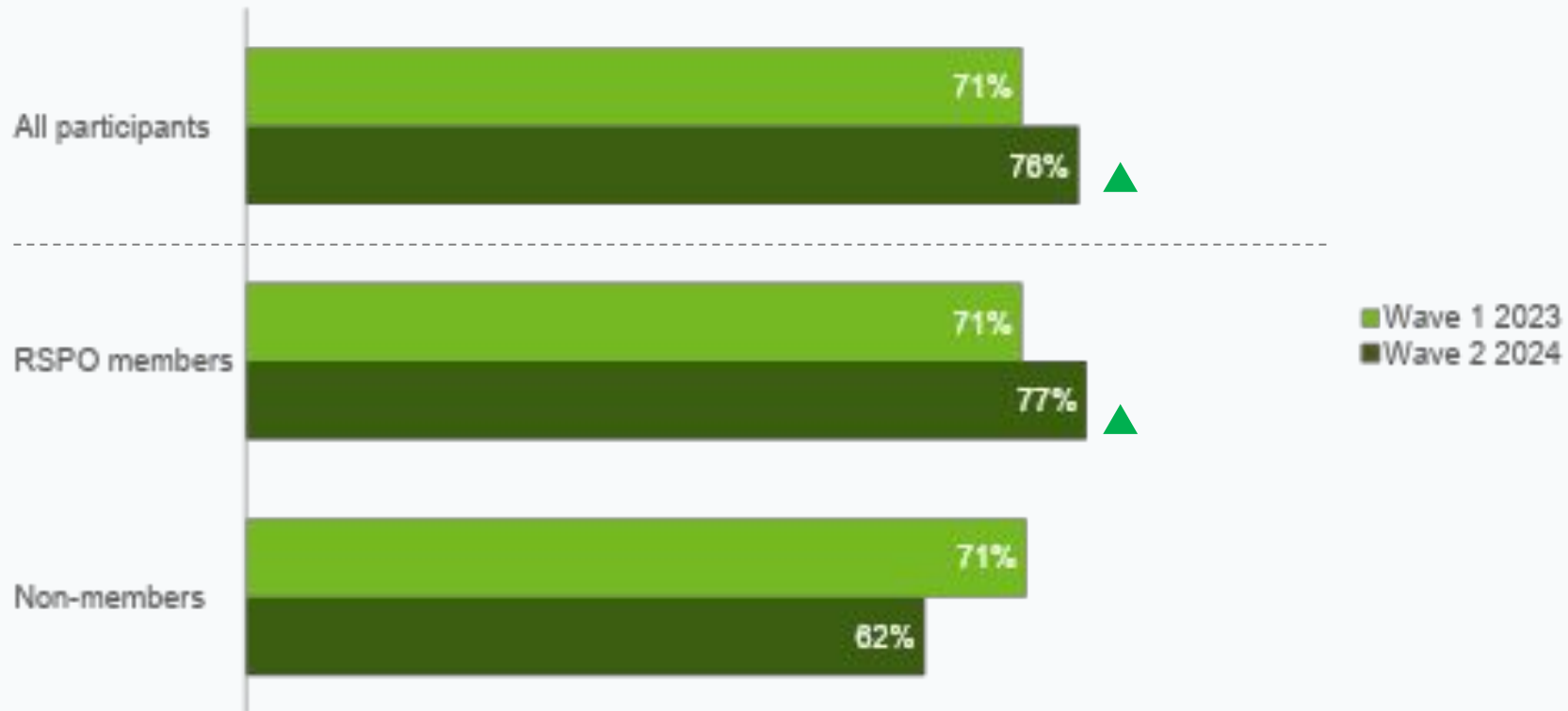
*“In the media, RSPO is almost always portrayed negatively, as the **measures in the palm regions are said to be insufficient.**”*
Supply chain associate/ manager, Europe

Q. Based on your own opinions and everything you have seen, read or heard, how would you rate the overall reputation of RSPO as an organisation? Q. Why do you say that?
Base: All participants who know at least a little about RSPO (n=560)

OVERALL REPUTATION OF RSPO

RSPO's reputation has increased significantly in the last year, specifically among RSPO members

% rating RSPO's reputation as excellent / very good – by membership



Q. Based on your own opinions and everything you have seen, read or heard, how would you rate the overall reputation of RSPO as an organisation?
Base: All participants who know at least a little about RSPO (n=560)

▲ ▼ Significantly different between waves

OVERALL REPUTATION OF RSPO

RSPO's reputation remains strong by region, though this strength has dropped year-on-year in Latin America & the Caribbean

% rating RSPO's reputation as excellent / very good – by region



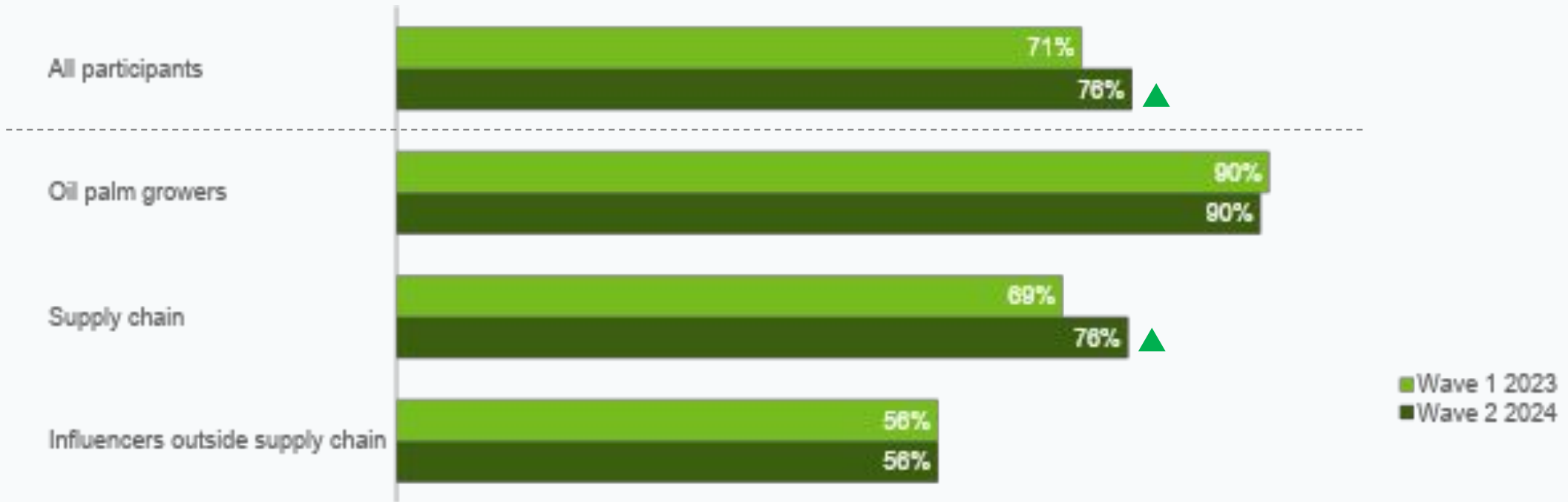
Q. Based on your own opinions and everything you have seen, read or heard, how would you rate the overall reputation of RSPO as an organisation?
Base: All participants who know at least a little about RSPO (n=560) – Africa & Middle East hidden due to low base sizes

▲ ▼ Significantly different between waves

OVERALL REPUTATION OF RSPO

RSPO's reputation has significantly increased among stakeholders in the supply chain; RSPO's reputation remains strongest among oil palm growers

% rating RSPO's reputation as excellent / very good – by stakeholder group



Q. Based on your own opinions and everything you have seen, read or heard, how would you rate the overall reputation of RSPO as an organisation?
Base: All participants who know at least a little about RSPO (n=560)

▲ ▼ Significantly different between waves

ADVOCACY TOWARDS RSPO

RSPO continues to have excellent advocacy scores, driven in part by recognition of its positive work regarding sustainability and the environment

Advocates (67%)

- **Commitment to sustainability and environmental Protection**
- **Positive impact on business and farmers**

*“RSPO is performing its role in **promoting environmental sustainability** to the best of its abilities within certain constraints.”*

Academia/research institution/think tank, Asia Pacific

*“RSPO is related to **environment conservation** that minimised negative impact to ecosystems, protect endangered species, and climate change mitigation.”*

Oil Palm Grower, Asia Pacific

*“As an organization that works with smallholder farmers towards RSPO certification, we have felt the **positive impact and benefits of RSPO.**”*

Oil Palm Grower, Asia Pacific



- Speak highly without being asked
- Speak highly if asked
- Neutral if asked
- Critical if asked
- Critical without being asked
- Don't know

Neutral (25%)

- **Lack of knowledge**
- **Criticism of effectiveness**

“I don't have enough expertise to speak in favour or against it.”

Supply chain associates/manager, Europe

*“We don't see any improvement since 2022... there seems to be **backsliding on its principles and criteria.**”*

Social or Development Organisation, Asia Pacific

Critics (7%)

- **Standards and processes**
- **Impact and effectiveness**

*“Criticisms regarding the **effectiveness of its standards, enforcement mechanisms, and inclusivity in decision-making processes.**”*

Palm oil processors & trader, Europe

RSPO's net advocacy score (advocates minus critics) is 60% - this outperforms the average seen across Echo clients (38%)

Q. Which of the following statements best describes your overall opinion of RSPO?

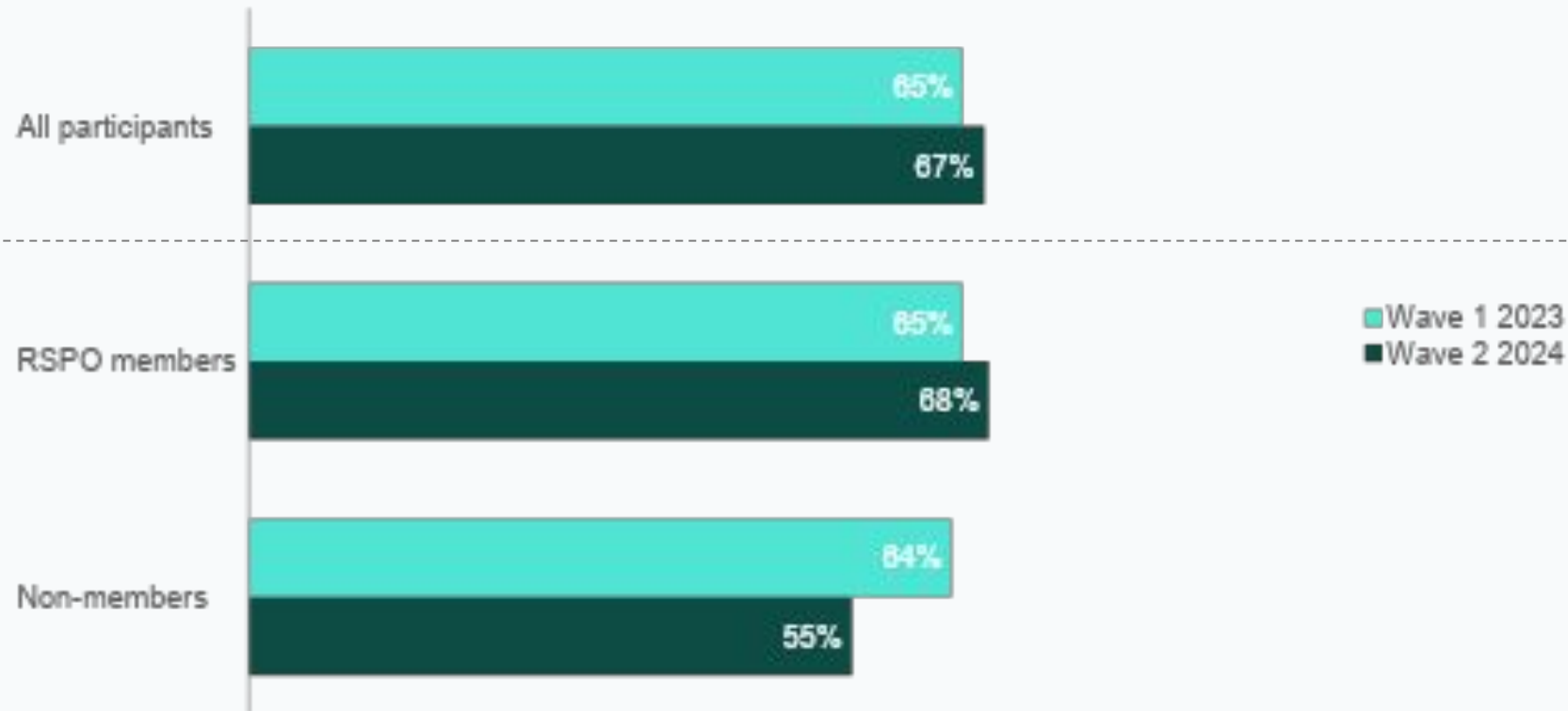
Q. Why do you say that?

Base: All participants who know at least a little about RSPO (n=560)

ADVOCACY TOWARDS RSPO

Advocacy remains strongest among members, but has softened among non-members

% advocates – by membership



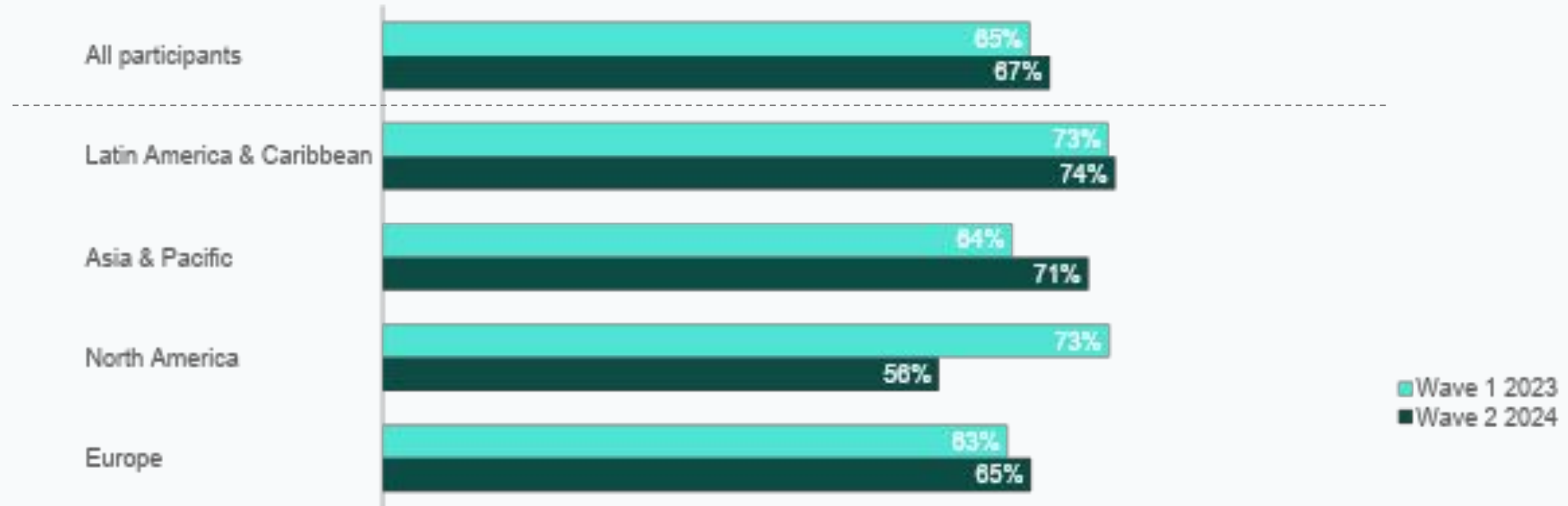
Q. Which of the following statements best describes your overall opinion of RSPO?
Base: All participants who know at least a little about RSPO (n=560)

*% advocates is 'would speak highly if asked' or 'would speak highly if not asked'

*There were no significant differences wave-on-wave

North America has the lowest proportion of advocates with a high proportion of neutrality

% advocates – by region



Q. Which of the following statements best describes your overall opinion of RSPO?

Base: All participants who know at least a little about RSPO (n=560) – Africa & Middle East not shown due to low base size

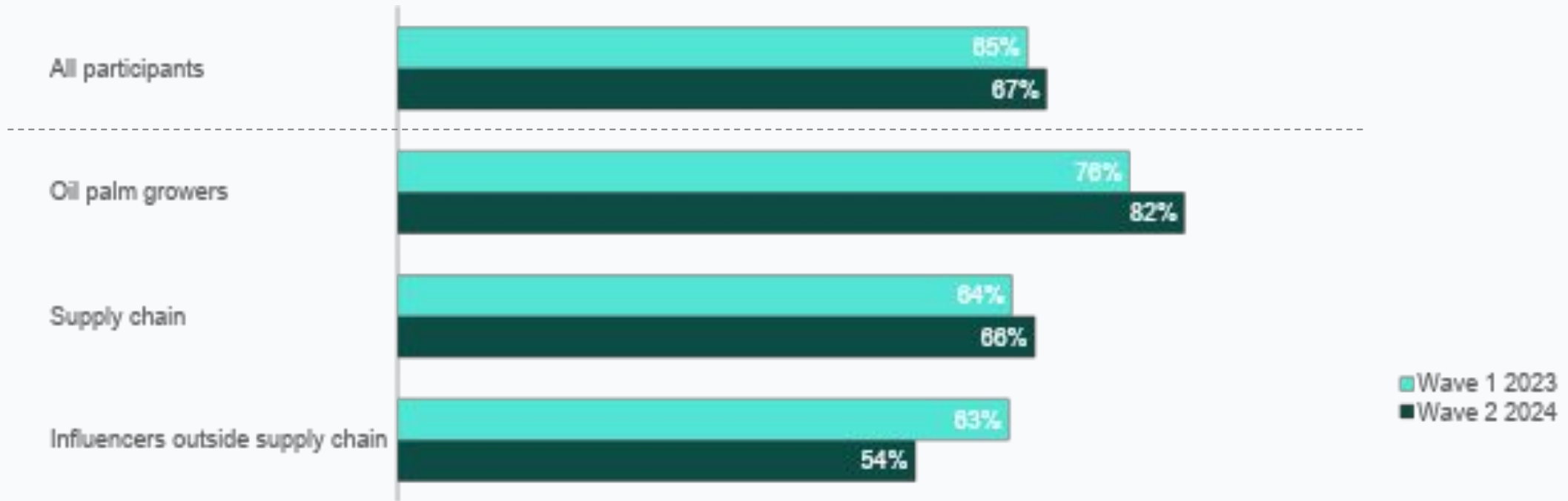
*% advocates is 'would speak highly if asked' or 'would speak highly if not asked'

*There were no significant differences wave-on-wave

ADVOCACY TOWARDS RSPO

Oil palm growers have the largest proportion of advocates, reflective of their high familiarity and overall positive perceptions surrounding RSPO's reputation

% advocates – by stakeholder group



Q. Which of the following statements best describes your overall opinion of RSPO?
Base: All participants who know at least a little about RSPO (n=634)

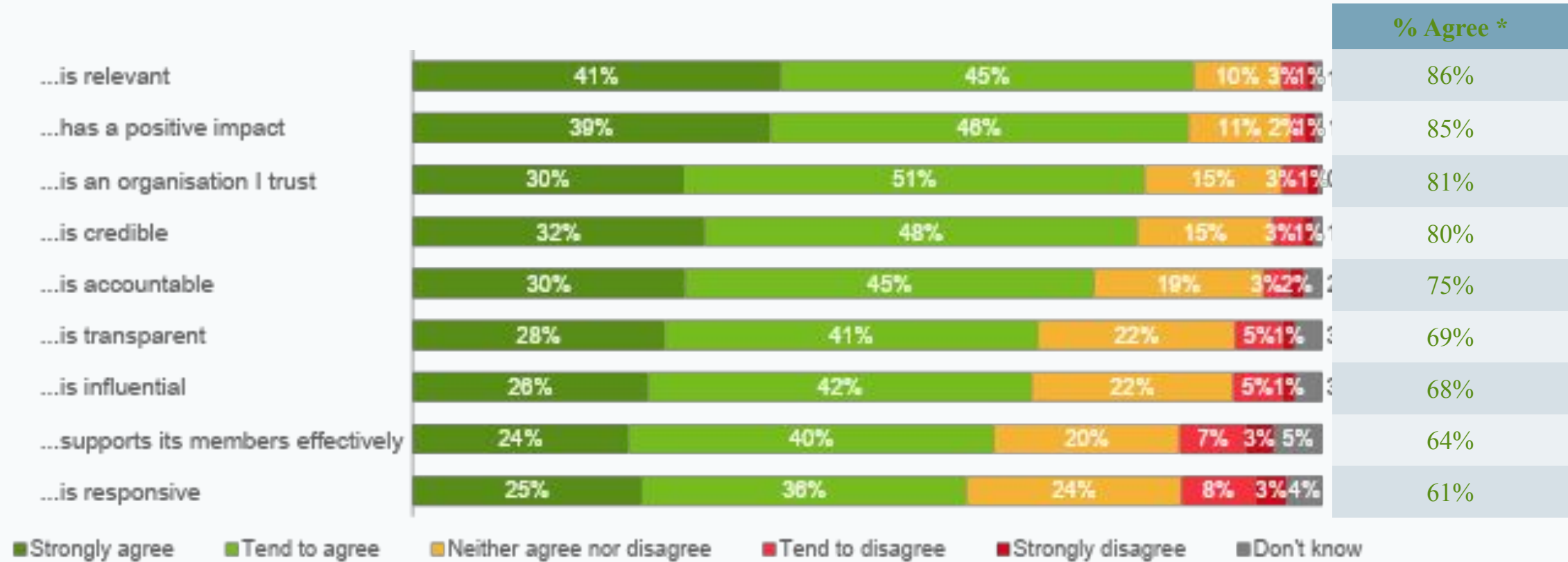
*% advocates is 'would speak highly if asked' or 'would speak highly if not asked'

*There were no significant differences wave-on-wave

PERCEPTIONS OF RSPO AS AN ORGANISATION

Of the attributes, RSPO is rated most highly for its relevance, positive impact and trust

RSPO...



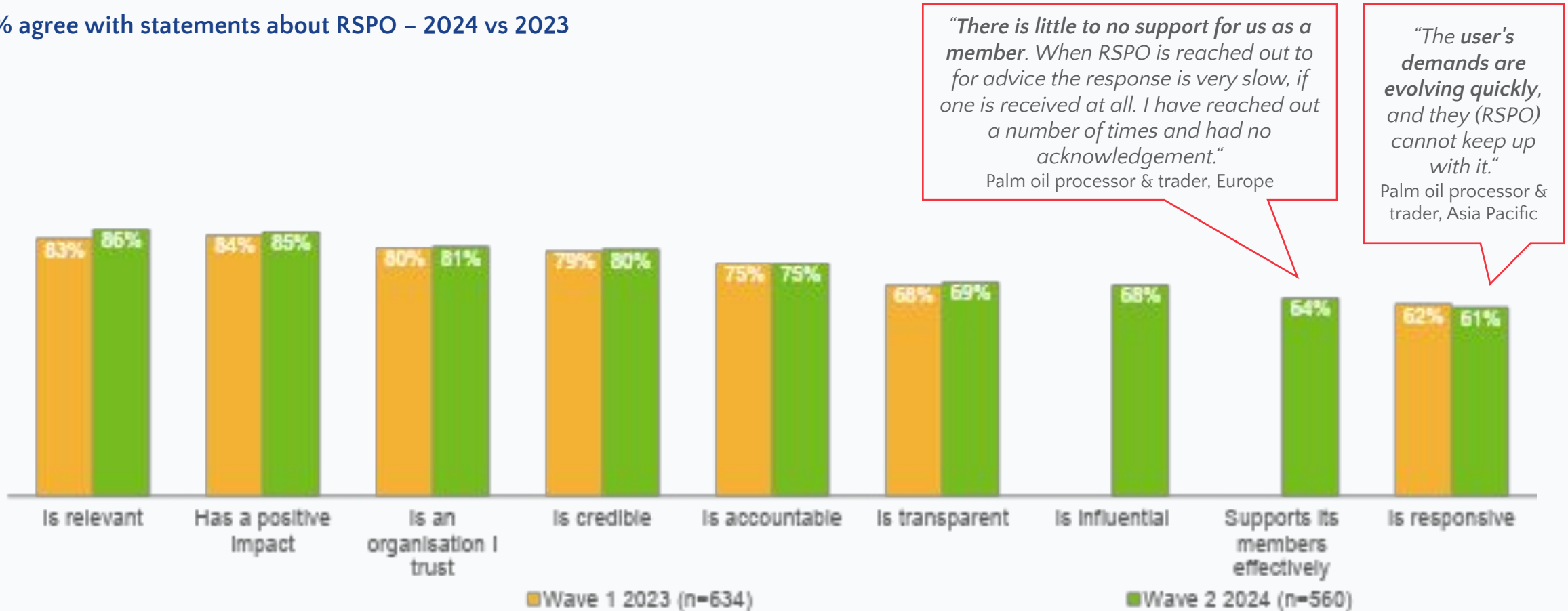
Q. To what extent do you agree or disagree with the following statements about RSPO as an organisation?
 Base: All participants who know at least a little about RSPO (n=560)

*% agree is 'strongly agree' or 'tend to agree'

PERCEPTIONS OF RSPO AS AN ORGANISATION

Perceptions of RSPO's support and responsiveness marginally weaker than the other attributes, perceptions have not changed year-on-year

% agree with statements about RSPO – 2024 vs 2023



Q. To what extent do you agree or disagree with the following statements about RSPO as an organisation?
Base: All participants who know at least a little about RSPO (n=560)

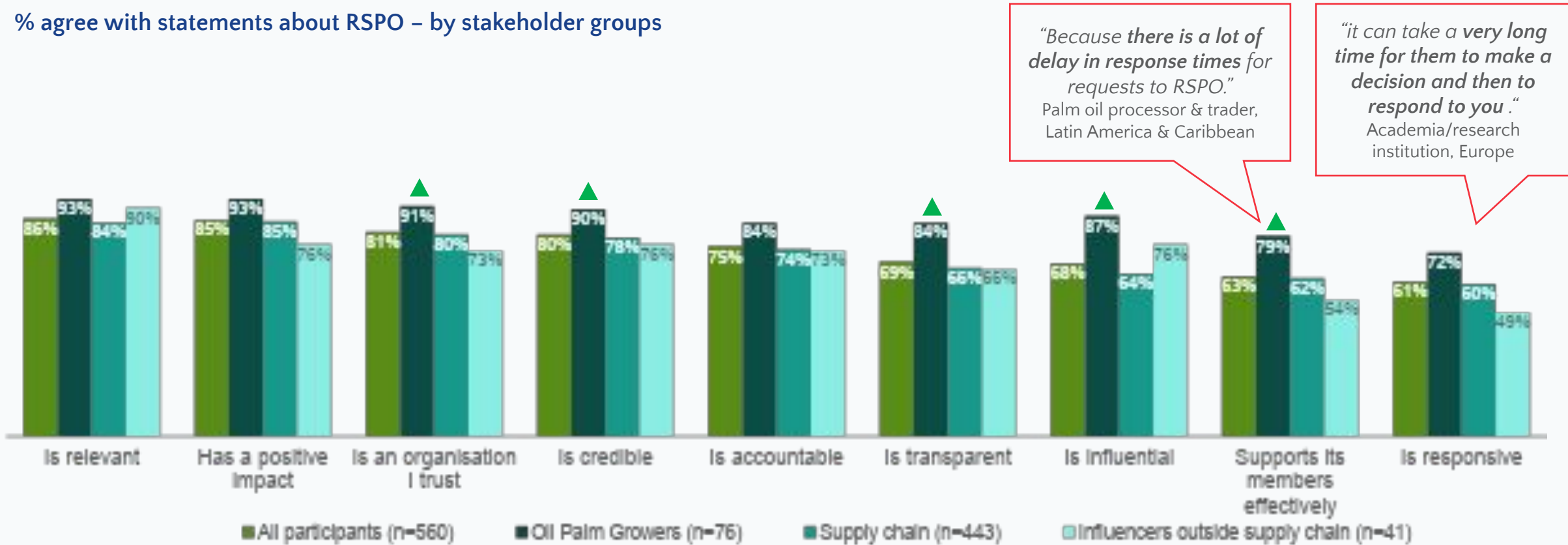
*% agree is 'strongly agree' or 'tend to agree'

*There were no significant differences wave-on-wave

PERCEPTIONS OF RSPO AS AN ORGANISATION

Oil palm growers rate most attributes more positively than other stakeholder audiences, influencers outside the supply chain are least likely to agree that RSPO is responsive

% agree with statements about RSPO – by stakeholder groups



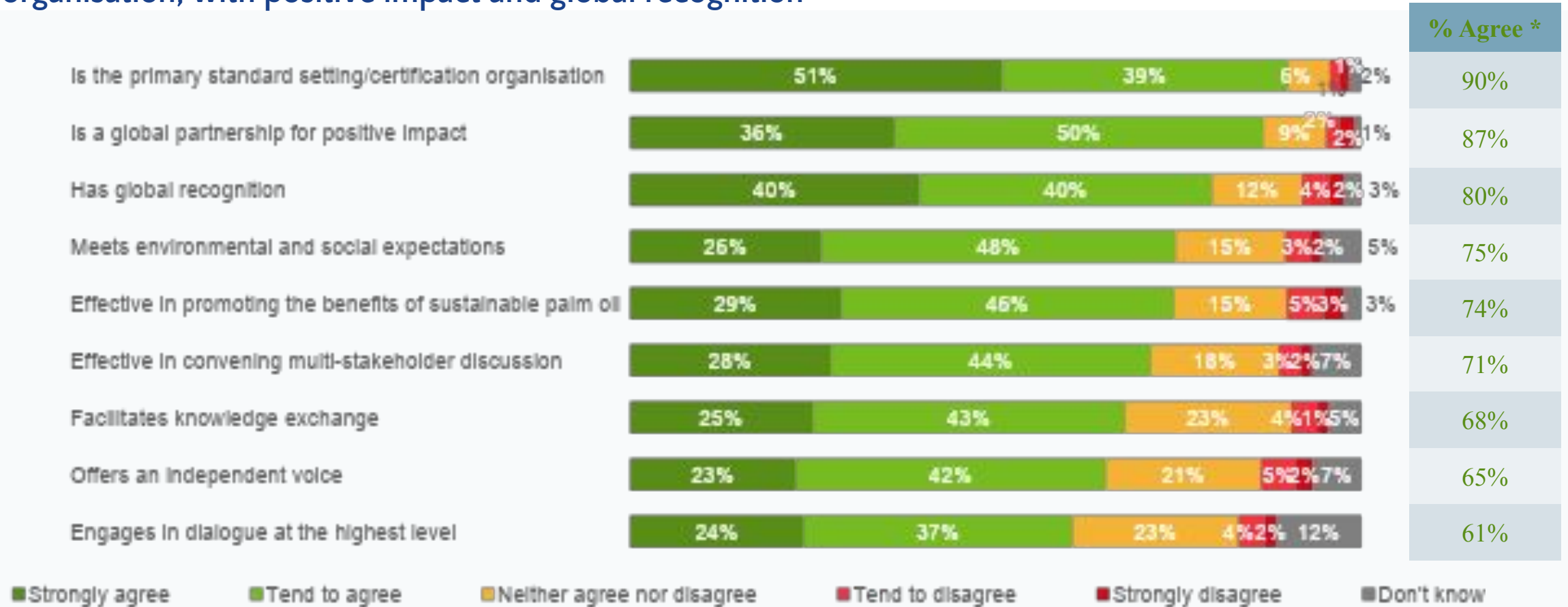
Q. To what extent do you agree or disagree with the following statements about RSPO as an organisation?
Base: All participants who know at least a little about RSPO (n=560)

*% agree is 'strongly agree' or 'tend to agree'

▲ ▼ Significantly different compared to the overall total

PERCEPTIONS OF RSPO'S WORK

There is strong agreement among participants that RSPO is the primary standard and certification organisation, with positive impact and global recognition



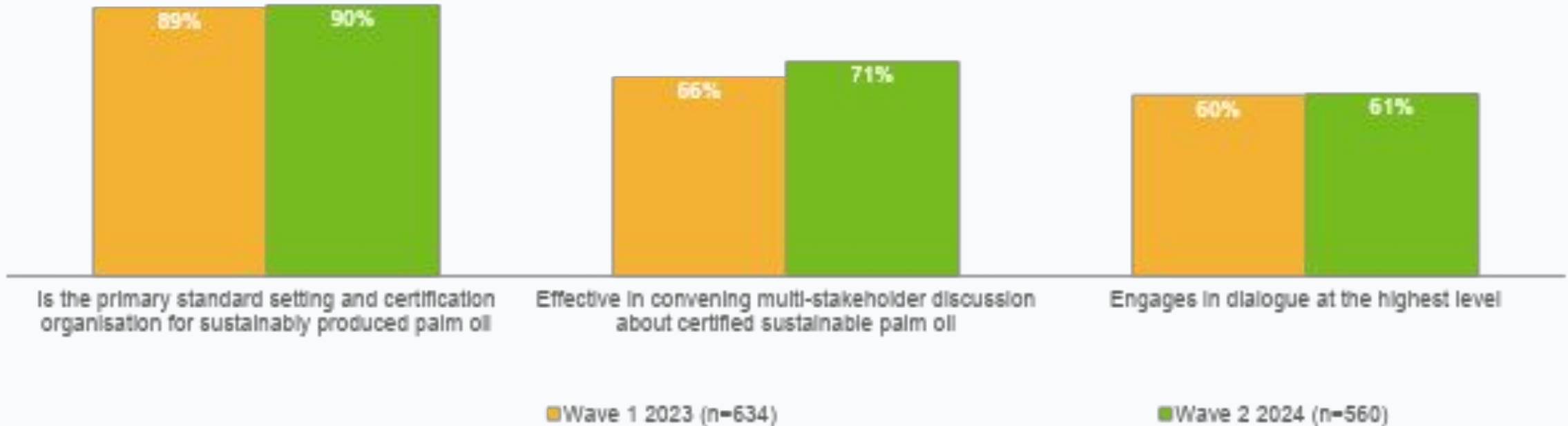
Q. To what extent do you agree or disagree with the following statements about RSPO's work?
 Base: All participants who know at least a little about RSPO (n=560)

*% agree is 'strongly agree' or 'tend to agree'

PERCEPTIONS OF RSPO'S WORK

Perceptions of RSPO's work have not changed year-on-year, there continues to be less recognition that RSPO 'engages in dialogue at the highest level'

% agree with statements about RSPO's work – 2024 vs 2023



Q. To what extent do you agree or disagree with the following statements about RSPO's work?
Base: All participants who know at least a little about RSPO (n=560)

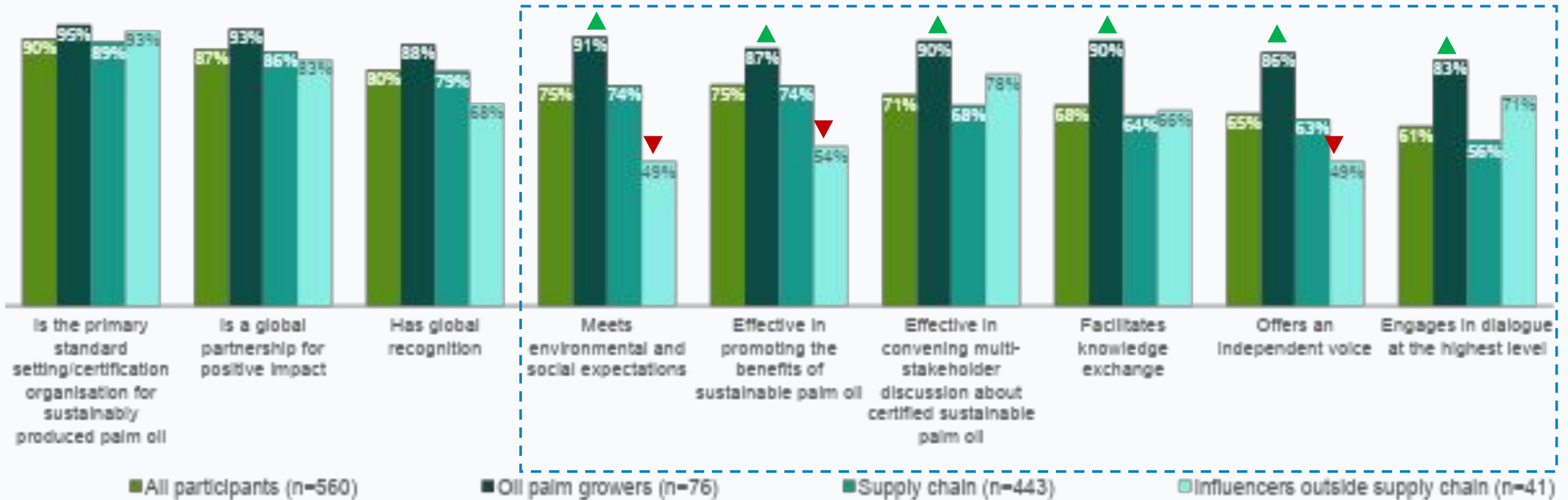
*% agree is 'strongly agree' or 'tend to agree'

*There were no significant differences wave-on-wave

PERCEPTIONS OF THE ROLE OF RSPO

There is some disconnect between stakeholder audiences regarding aspects of the effectiveness of RSPO's work

% agree with statements about RSPO's work – by stakeholder group



Q. To what extent do you agree or disagree with the following statements about RSPO's work?
 Base: All participants who know at least a little about RSPO (n=560)

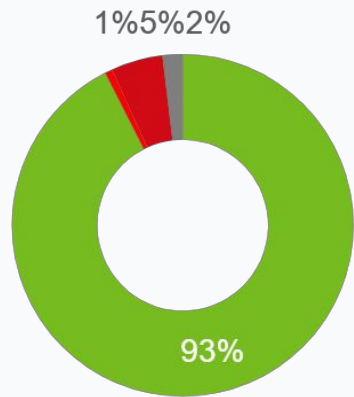
*% agree is 'strongly agree' or 'tend to agree'

▲ ▼ Significantly different compared to the overall total

RSPO MEMBERSHIP

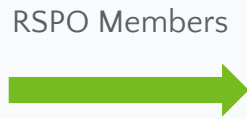
Almost all members are likely to continue with their membership going forward, with 80% stating they are 'very likely'

Membership of RSPO

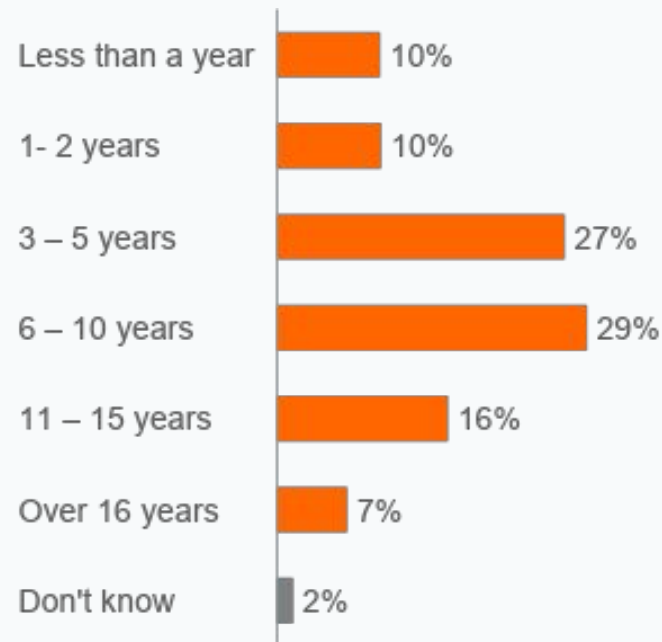


- Yes
- No but considering membership
- No and not considering membership
- Not sure / Don't know

Q. Are you / your organisation a member of the Roundtable on Sustainable Palm Oil (RSPO)? Base: All participants (n=571)

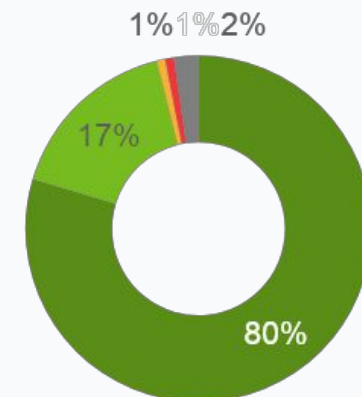


Length of membership



Q. For how many years have you / your organisation been a member of RSPO? Base: All members of RSPO (n=528)

Likelihood to continue membership



- Very likely
- Fairly likely
- Fairly unlikely
- Very unlikely
- Not sure / Don't know

Q. How likely are you to continue your membership with RSPO? Base: All members of RSPO (n=528)

RSPO MEMBERSHIP: REASONS FOR CONSIDERATION / NON-CONSIDERATION

Reasons for not considering RSPO membership include lack of relevance and lack of awareness of the benefits of membership

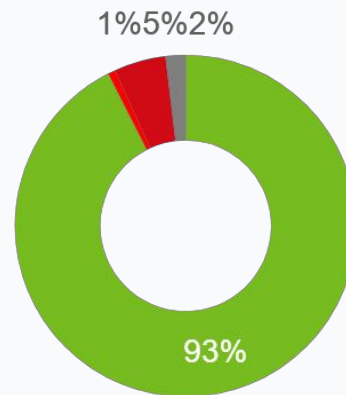
Reasons for considering becoming a member of RSPO

“Given that RSPO has thousands of members and I assume that Malaysian NGOs are a tiny minority now, so I think it’s good to have representation.”
Non-Member: Academia/research institutions/think tank, Asia Pacific

“To be able to more closely follow the process of standard adjustments and politics.”
Palm oil processor & trader, North America

Q. What interests you about potentially becoming a member of RSPO?
Base: Non-members of RSPO considering membership (n=4*) *Caution low base size

Membership of RSPO



■ Yes
■ No but considering membership
■ No and not considering membership
■ Not sure / Don't know

Q. Are you / your organisation a member of the Roundtable on Sustainable Palm Oil (RSPO)?
Base: All participants (n=571)

Reasons for not considering becoming a member of RSPO

“It is just not relevant for our organisation.”
IGO, Europe

“I am not directly involved in the production of palm oil. I am a concerned citizen from Malaysia and will join if an avenue allows me to come.”
Academia/research institution/think tank, Asia Pacific

“I do not know what the benefits are for our company.”
Palm oil processor & trader, Europe

Q. Why are you not currently considering RSPO membership?
Base: Non-members of RSPO not considering membership (n=28*) *Caution low base size

Perceptions of RSPO's certification

03

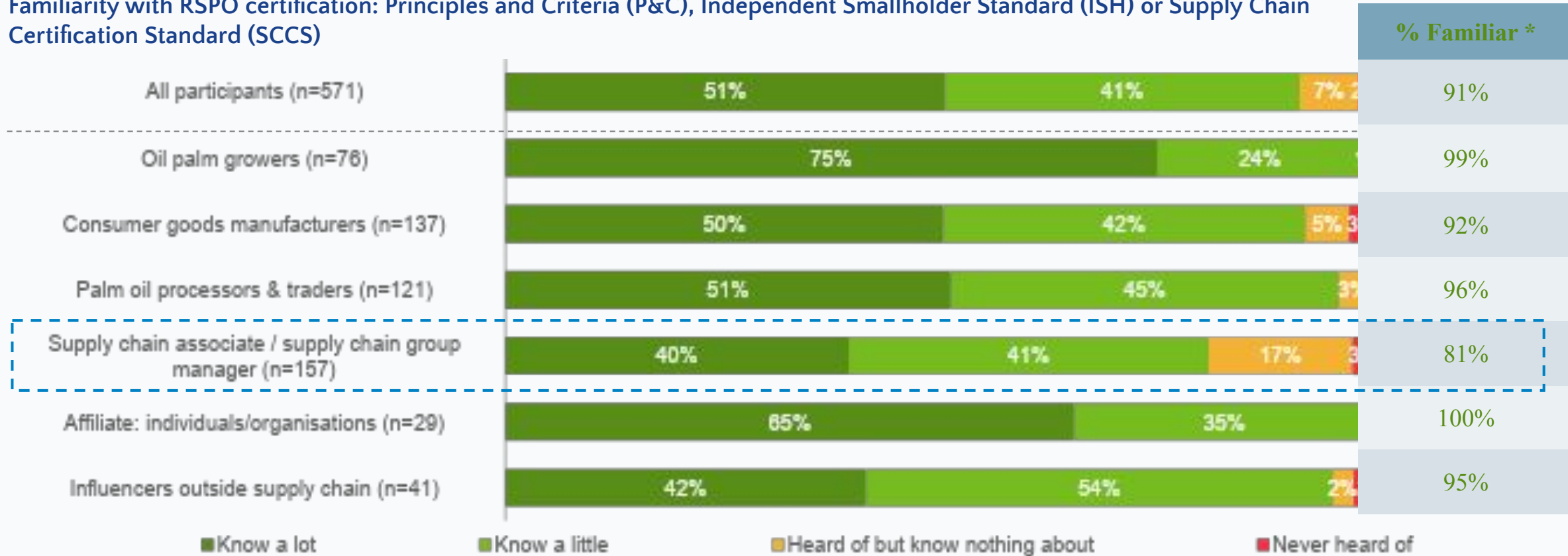


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FAMILIARITY WITH RSPO CERTIFICATION

Overall familiarity with RSPO's certification is high among all stakeholder groups; there is an opportunity to further educate supply chain associates/managers

Familiarity with RSPO certification: Principles and Criteria (P&C), Independent Smallholder Standard (ISH) or Supply Chain Certification Standard (SCCS)



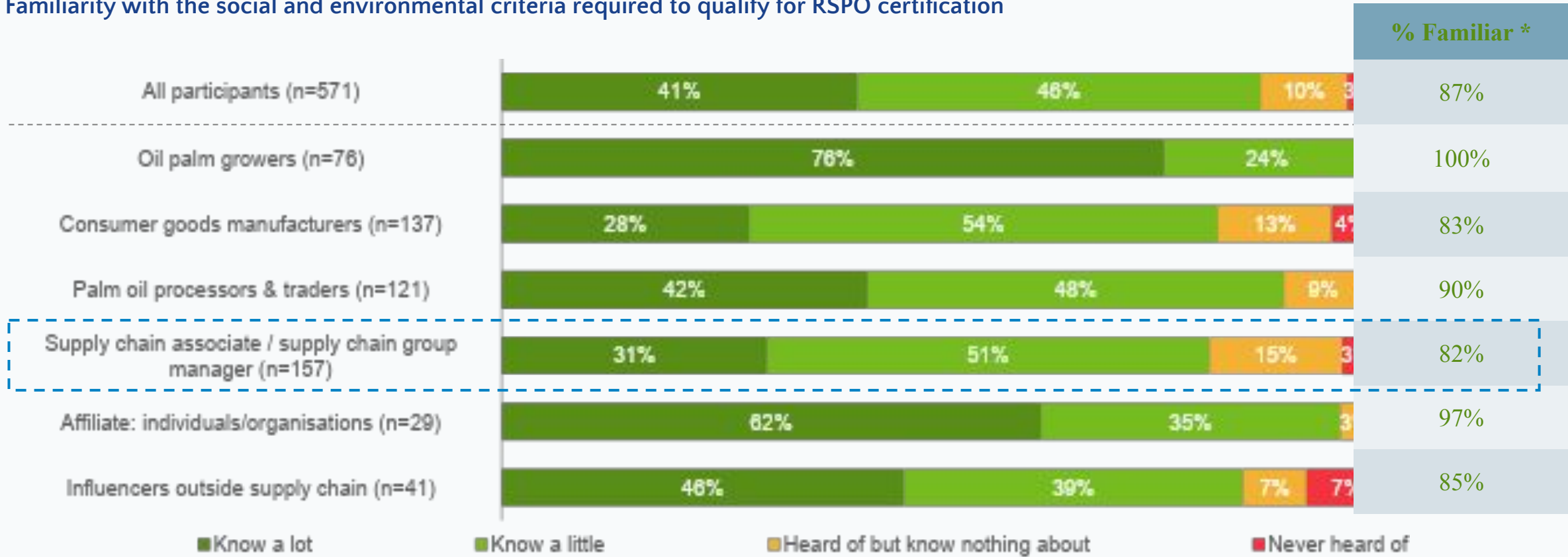
Q. How familiar are you with the following...
Base: All participants (n=571)

*% familiar is 'know a lot' or 'know a little'

FAMILIARITY WITH RSPO CERTIFICATION

Familiarity with the criteria required for certification is lower than awareness of the certification itself, emphasising the need for further communication

Familiarity with the social and environmental criteria required to qualify for RSPO certification



Q. How familiar are you with the following...
Base: All participants (n=571)

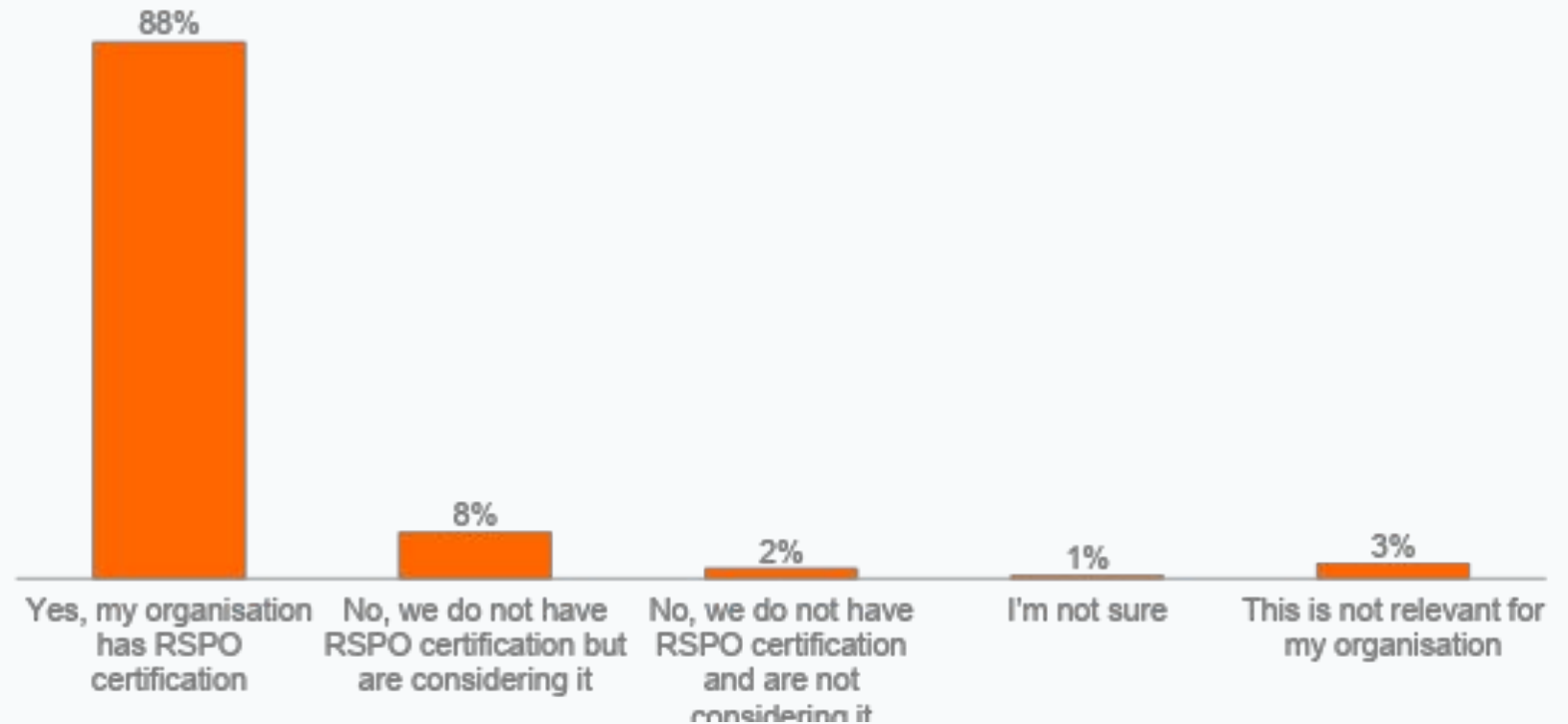
*% familiar is 'know a lot' or 'know a little'

PERCEPTIONS OF RSPO CERTIFICATION

Almost 90% of RSPO members report that their organisation has RSPO certification

RSPO members classified as:

- Oil Palm Growers
- Consumer Good Manufacturers
- Palm Oil Processors & Traders
- Supply Chain Associates
- Supply Chain Group Manager



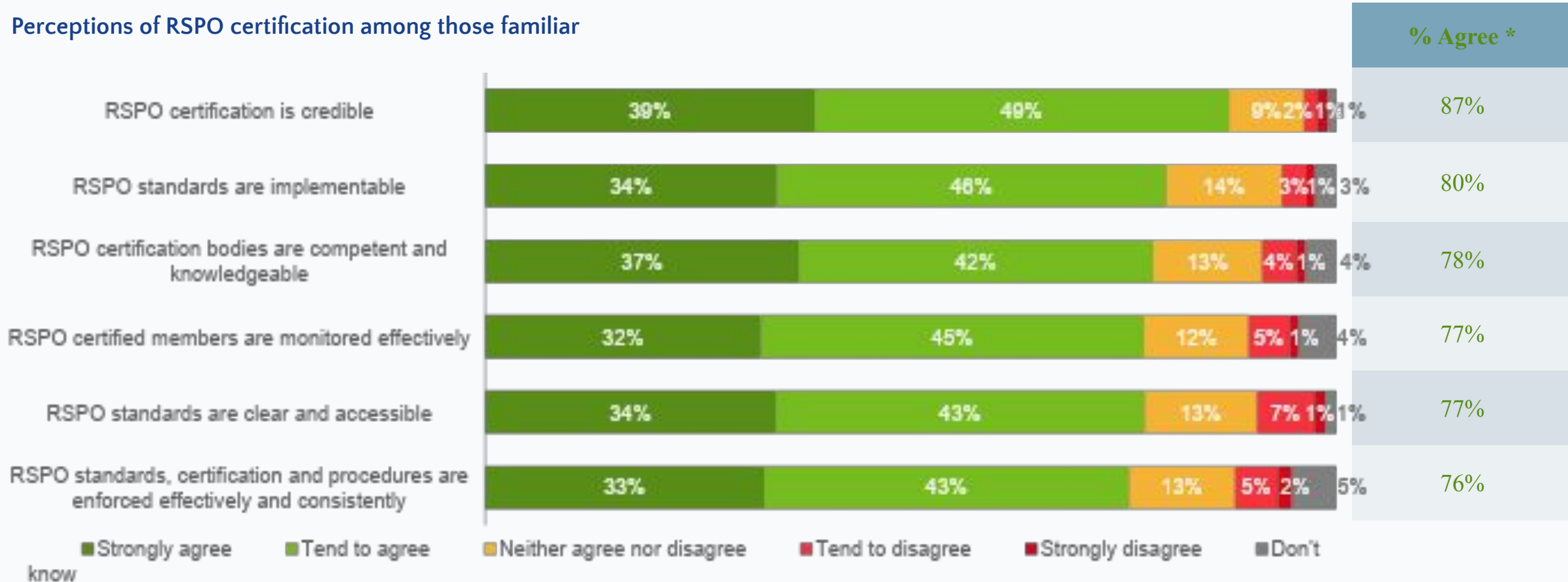
Q. Is your organisation RSPO certified?

Base: All members of RSPO within key stakeholder groups (n=474)

PERCEPTIONS OF RSPO CERTIFICATION

There is strong agreement that RSPO's certification is credible, that standards are implementable and certification bodies are competent

Perceptions of RSPO certification among those familiar



Q. To what extent do you agree or disagree with the following statements about RSPO's Certified Sustainable Palm Oil (CSPO) certification?

Base: All participants at least a little familiar with RSPO certification (n=522)

*% agree is 'strongly agree' or 'tend to agree'

PERCEPTIONS OF RSPO CERTIFICATION

Agreement with statements regarding RSPO's certification is strongest among oil palm growers, and lowest among those outside the supply chain

% agree* with statements about RSPO's certification – by stakeholder groups



Q. To what extent do you agree or disagree with the following statements about RSPO's certification?
Base: All at least a little familiar with RSPO certification (n=522)

*% agree is 'strongly agree' or 'tend to agree'

▲ ▼ Significantly different compared to the overall total

REASONS WHY DISAGREE WITH STATEMENTS ABOUT RSPO CERTIFICATION

A small minority are critical of RSPO's certification, citing ambiguity in the wording of the standards, concerns about the audit process and competency of certification bodies

Standards are clear and accessible
8% DISAGREE

*"There were several requirements where the **wording was unclear and we required external consultant support**, which we had to pay for, in order to help us interpret the requirements correctly."*
Consumer goods manufacturer, North America

*"In the **interpretation of some standards, requirements, or guidelines**, there are things that are not specific and give rise to different criteria."*
Affiliate organisation, Latin America & Caribbean

Standards, certification and procedures are enforced effectively and consistently
7% DISAGREE

*"Auditors have collusive relations with the companies that pay them to be audited. **Audit teams are not independent** when visiting estates, workers and communities."*
Social/development organisation, Europe

*"There is extensive evidence that social criteria and indicators are routinely violated by certified operations and these **non-compliances are not identified** by auditors."*
Social/development organisation, Europe

Certification bodies are competent and knowledgeable
5% DISAGREE

*"The capacity of the certification companies needs to be further enhanced. They **need to be more critical and better trained on what the RSPO standard actually means**."*
Palm oil processor/ trader, Asia Pacific

*"In the LATAM region there is a lack of certifying bodies and those that do exist **do not necessarily know the standard in depth**."*
Oil palm grower, Latin America & Caribbean

Standards are implementable
4% DISAGREE

*"Full supply chain certification is not possible to achieve. The task is too much and the **ask from suppliers and distributors is too high to become members** and under the audit process."*
Supply chain associate/ manager, Europe

*"Standards that demand things that are not relevant in our countries...they have copied the standards from Asia to America **without taking into account the context of our countries**."*
Oil palm grower, Latin America & Caribbean

Q. Why do you disagree that [PIPE IN STATEMENT]?

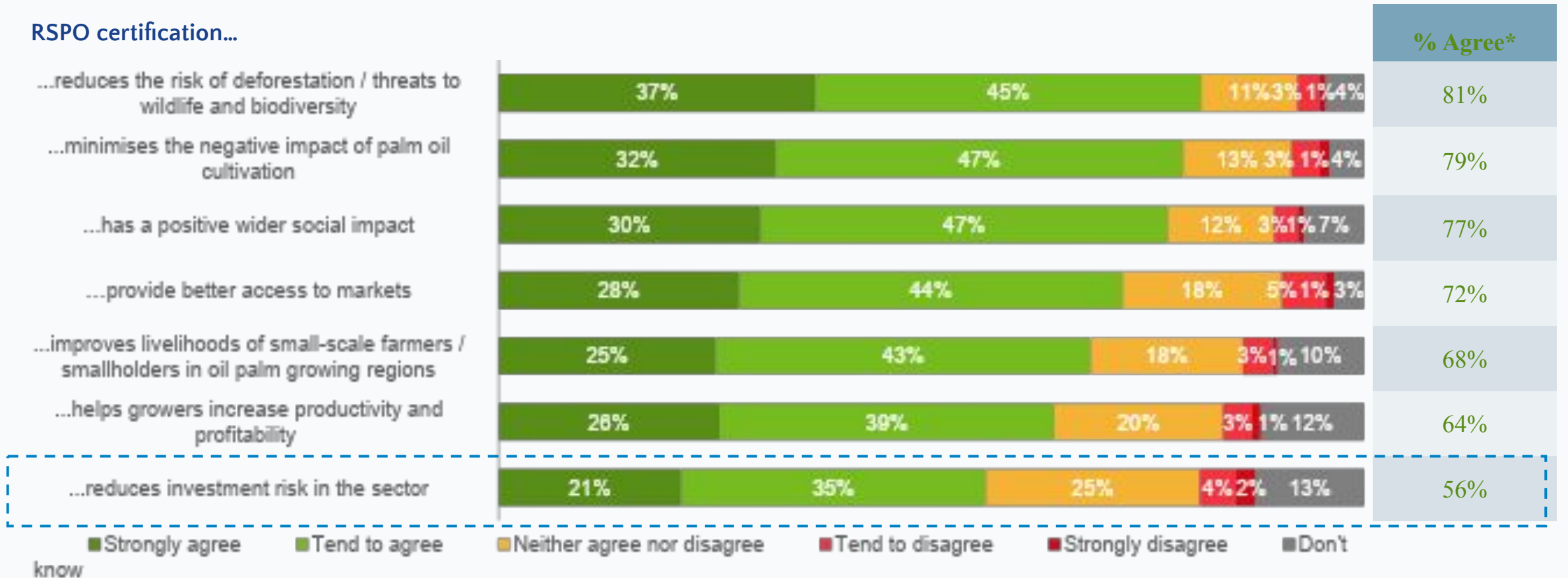
Base: Those who know RSPO certification at least a little and disagree with the statement shown (base sizes vary for each statement)

*% disagree is 'strongly disagree' or 'tend to disagree'

PERCEIVED IMPACT OF RSPO CERTIFICATION

RSPO certification is recognised for its impact in reducing deforestation and minimising the negative impact of palm oil cultivation, less so for reducing investment risk in the sector

RSPO certification...



Q. To what extent do you agree or disagree that RSPO's Certified Sustainable Palm Oil (CSPO) certification scheme has the following impact?

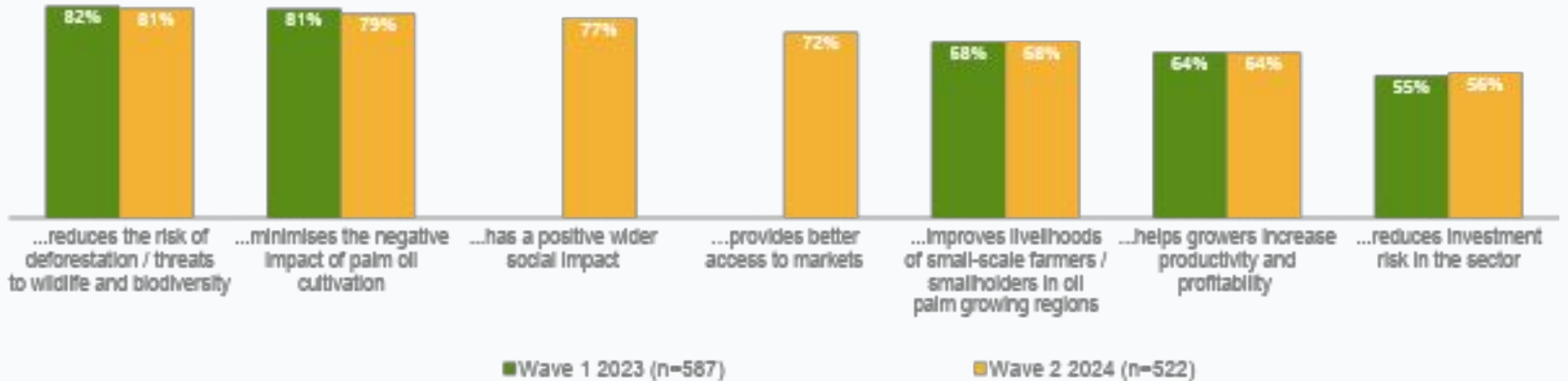
Base: All at least a little familiar with RSPO certification (n=522)

*% agree is 'strongly agree' or 'tend to agree'

PERCEIVED IMPACT OF RSPO CERTIFICATION

There is a consistent pattern wave-on-wave in the level of agreement regarding the impact of RSPO certification

% agree with statements about perceived impact of RSPO certification – 2024 vs 2023



Q. To what extent do you agree or disagree that RSPO's Certified Sustainable Palm Oil (CSPO) certification scheme has the following impact?

Base: All at least a little familiar with RSPO certification (n=522)

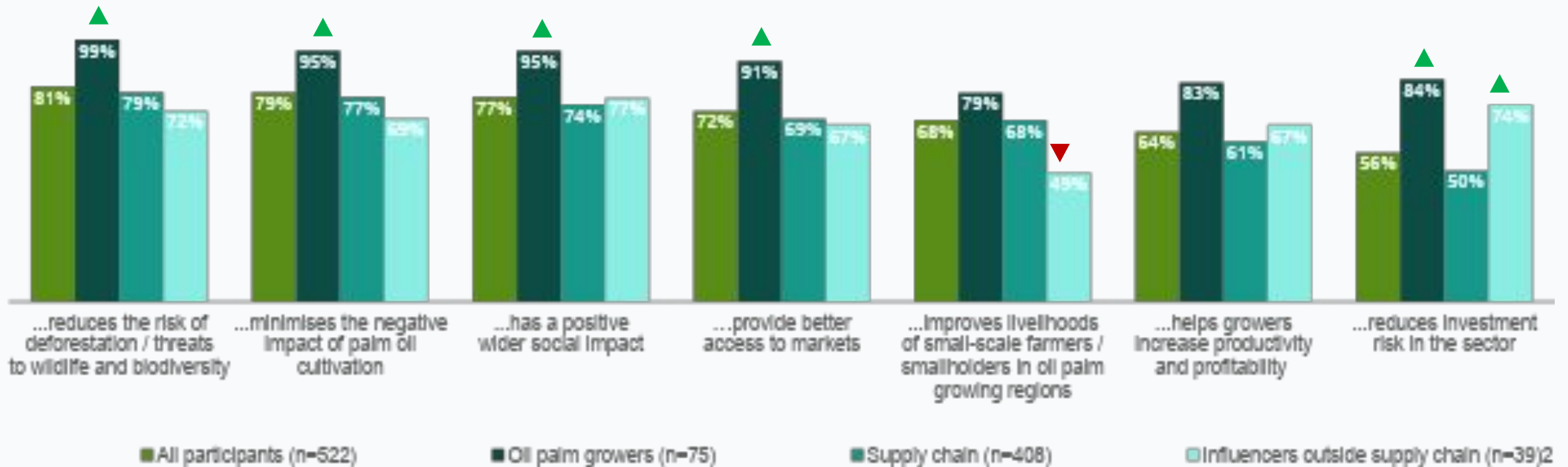
*% agree is 'strongly agree' or 'tend to agree'

*There were no significant differences wave-on-wave

PERCEIVED IMPACT OF RSPO CERTIFICATION

As was the case with perception of RSPO certification, sentiment regarding the perceived impact of RSPO certification is strongest among oil palm growers

% agree with statements about perceived impact of RSPO certification – by stakeholder group



Q. To what extent do you agree or disagree that RSPO's Certified Sustainable Palm Oil (CSPO) certification scheme has the following impact?

Base: All at least a little familiar with RSPO certification (n=522)

*% agree is 'strongly agree' or 'tend to agree'

▲ ▼ Significantly different compared to the overall total

REASONS WHY DISAGREE THAT RSPO CERTIFICATION HAS A POSITIVE SOCIAL IMPACT

While real evidence of social impact is perceived as harder to demonstrate, there are also concerns regarding the consistency of implementation and monitoring once certification has been awarded

RSPO certification has a positive wider social impact (e.g., on human rights, gender equity and local communities)
4% DISAGREE

*“The weakness of RSPO is that the **social things are more difficult to enforce**...do they really look for it when giving the certification...how much do they scrutinize the human rights or gender issues or if the farmers and local communities are happy?”*
Academia/research institutions/think tank, Asia Pacific

*“Because **the standards**, which are good, **are not actually upheld.**”*
Social/development organisation, Europe

*“I disagree with the statement that RSPO’s certification scheme has a positive wider social impact based on several factors: 1. **Limited benefits for local communities**...2. **Challenges in implementation**... 3. **Limited inclusivity**...while RSPO certification may have positive intentions regarding social impact, there are **concerns about the effectiveness and inclusivity of its implementation**, which can hinder its ability to generate significant positive outcomes for wider social well-being.”*

Palm oil processor & trader, Europe

*“**Certified companies do not demonstrate tangible social impacts**, it becomes only a plan to demonstrate to an auditor with minimal efforts and not programmes that benefit communities.”*
Palm oil processors & trader, Latin America & Caribbean

*“There are **other sustainability mechanisms that are generating greater social impact**, as they are more closely monitored by clients: NDPE, EUDR, due diligence of compliance with sustainability policies of client companies.”*
Oil palm grower, Latin America & Caribbean

*“**I have seen no evidence to prove it.**”*
Supply chain associate/manager, Asia Pacific

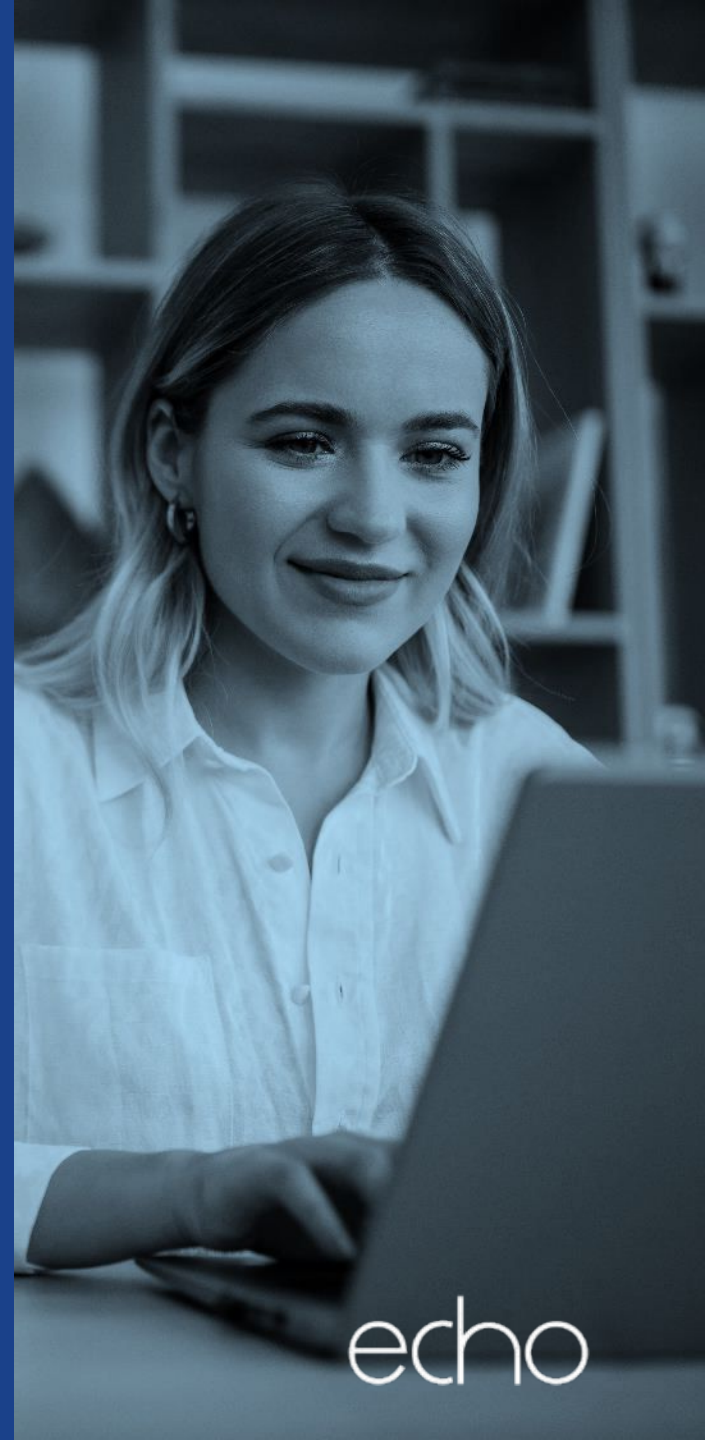
Q. Why do you disagree that RSPO’s certification has a positive wider social impact?

Base: Those who know RSPO certification at least a little and disagree with the statement ‘RSPO’s certification has a positive wider social impact’

*% disagree is ‘strongly disagree’ or ‘tend to disagree’

Communications, and engagement

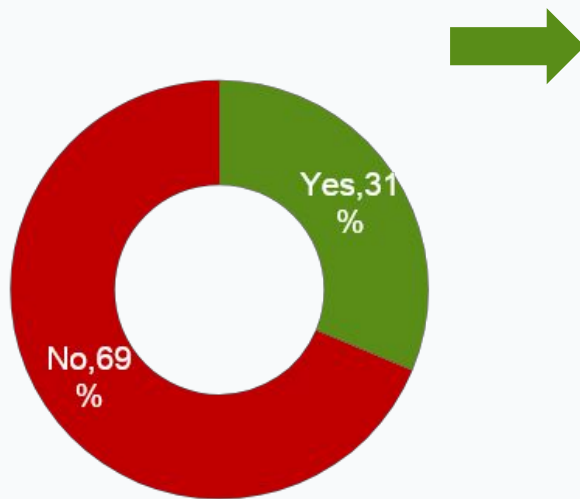
04



RSPO GOVERNMENT ENGAGEMENT ACTIVITIES

Almost a third of participants are aware of RSPO's government engagement, activities with the EU are commonly referenced. Over three quarters believe RSPO's engagement activities are effective

Awareness of RSPO's government engagement

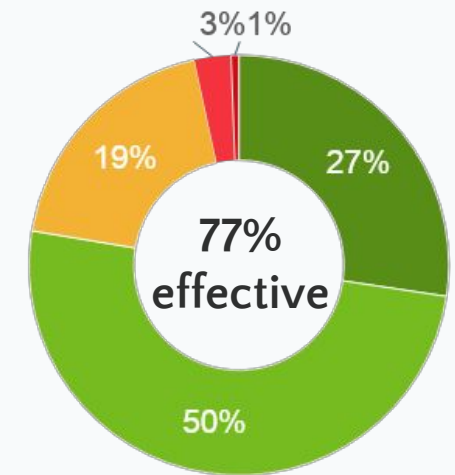


Government engagement activities aware of



*Other markets mentioned in terms of engagement included India, Honduras, Malaysia, Mexico, South Africa and the USA

Effectiveness of government engagement activities



Very effective
Fairly effective
Neither
Fairly ineffective
Very ineffective

Q. Are you aware of any engagement activities that RSPO has undertaken with governments at a national or international level in the last 12 months?
Base: All participants (n=571)

Q. What government engagement activities are you aware of?
Base: Participants aware of engagement activities (n=179)

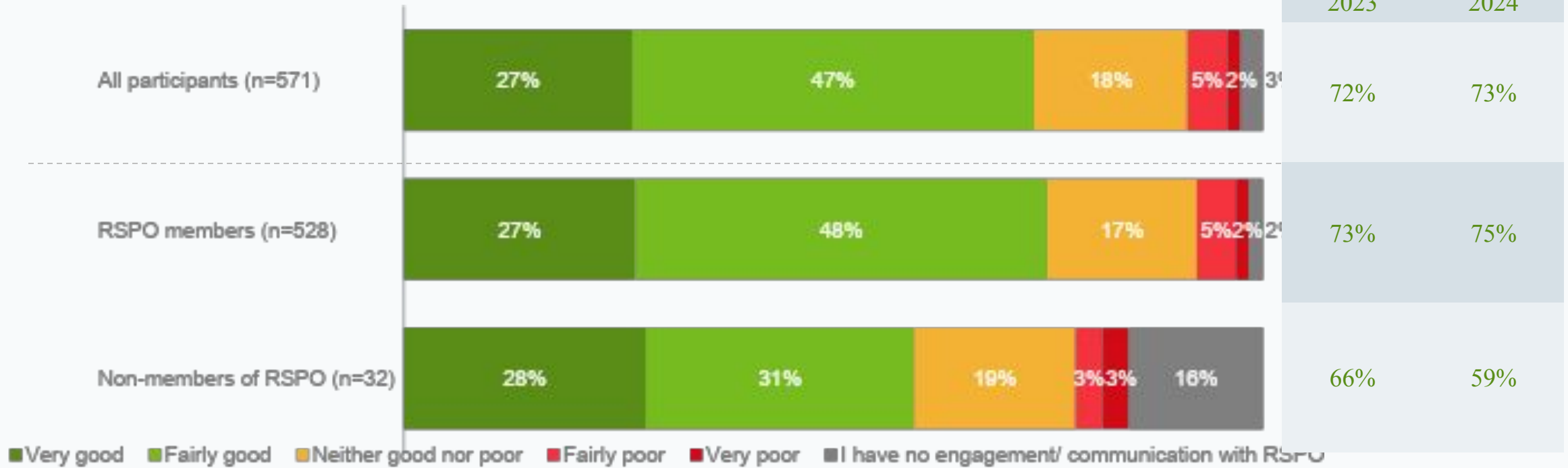
Q. How effective do you consider these activities have been in advancing the interests of RSPO members?
Base: Participants aware of engagement activities (n=179)

*% effective is 'very effective agree' or 'fairly effective'

QUALITY OF RSPO COMMUNICATIONS AND ENGAGEMENT

73% of participants rate the quality of RSPO's communications and engagement as good; members rate communication and engagement more positively than non-members

Overall quality of communication and engagement



Q. How would you rate the overall quality of RSPO's communications and engagement with you?
Base: All participants (n=571)

*% good is 'very good' or 'fairly good'

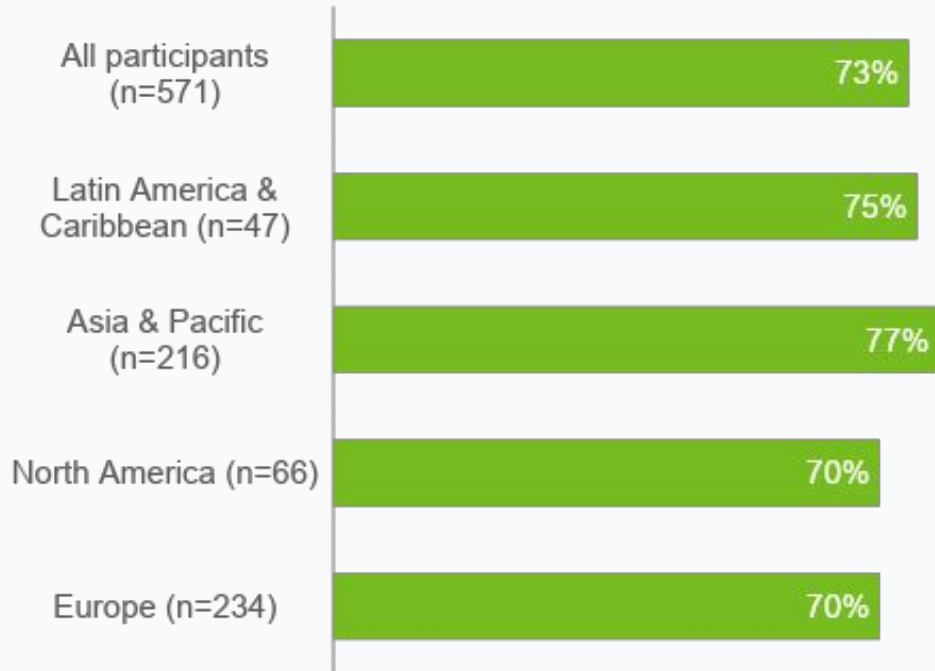
*There were no significant differences wave-on-wave

QUALITY OF RSPO COMMUNICATIONS AND ENGAGEMENT

The further down the supply chain participants are, the less likely they are to rate communication and engagement as highly

% rating RSPO's communications as fairly or very good

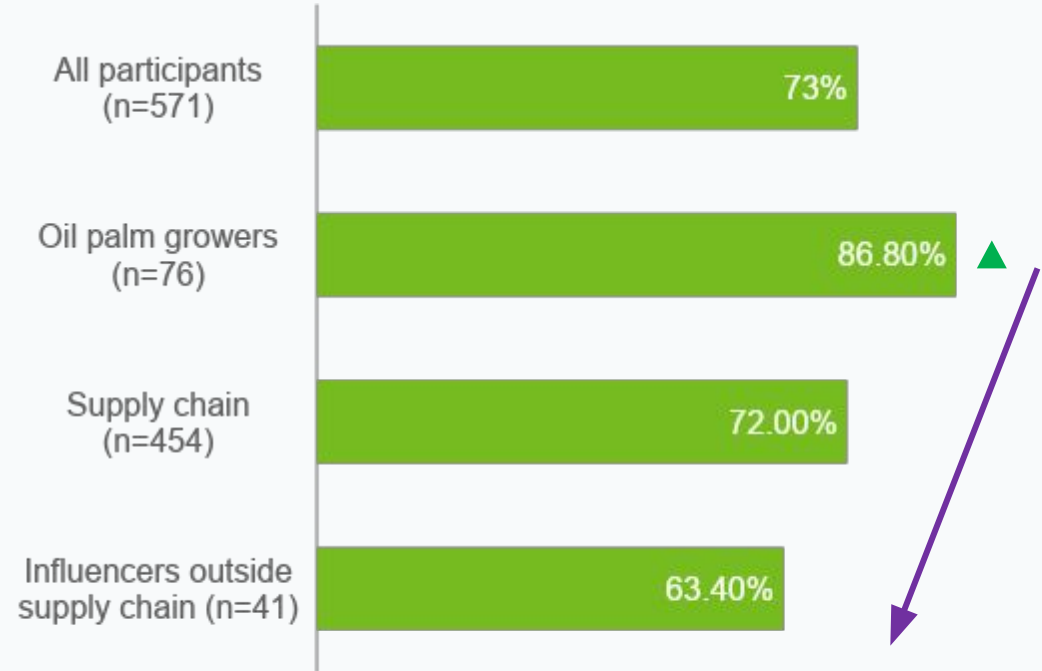
By region



*Not plotted on chart, Middle East & Africa, due to low base size

Q. How would you rate the overall quality of RSPO's communications and engagement with you?
Base: All participants (n=571)

By stakeholder groups



SUGGESTIONS FOR HOW RSPO COULD IMPROVE THEIR COMMUNICATON AND ENGAGEMENT

Suggestions to further enhance relationships focus on more proactive, timely, tailored and frequent communications which consider individual stakeholder needs, including language

TIMELY RESPONSES TO EMAILS AND ENQUIRIES	FREQUENT, PERSONALISED & TAILORED TRAINING AND ENGAGEMENTS	ENHANCED MULTILINGUAL COMMUNICATION / LOCAL CONTEXT CONSIDERATION	INCREASED TRANSPARENCY AND PROACTIVE OUTREACH
<p><i>“Act and respond quickly to all complaints.”</i></p> <p>Palm oil processor & trader, Asia Pacific</p>	<p><i>“Personalize emails to send communications specifically directed to the type of member.”</i></p> <p>Consumer goods manufacturer, Europe</p>	<p><i>“Communication is in English with the main offices, and not all of us speak the language.”</i></p> <p>Oil palm grower, Latin America & Caribbean</p>	<p><i>“In nearly 10 years of membership, we have NEVER had someone from RSPO proactively reach out.”</i></p> <p>Consumer goods manufacturer, North America</p>
<p><i>“Improve response times to requests.”</i></p> <p>Oil palm grower, Latin America & Caribbean</p>	<p><i>“Greater dissemination of events in a personalized manner, not just through social networks.”</i></p> <p>Individuals/ organisations/ associations, Latin America & Caribbean</p>	<p><i>“We need a Japanese version for the manual and all other documents with more accurate language.”</i></p> <p>Supply chain associate/ manager, Asia Pacific</p>	<p><i>“Be more transparent on a global level but also pay attention to the micro details and macro details.”</i></p> <p>Supply chain associate/manager, Europe</p>
<p><i>“Improve turnaround time on those emails that are answered.”</i></p> <p>Palm oil processor & trader, Europe</p>	<p><i>“Organize socialisation, seminars, and training regularly and for free.”</i></p> <p>Palm oil processor & traders, Asia Pacific</p>	<p><i>“Take local contexts into account. Promote the implementation of interim measures within reasonable timeframes.”</i></p> <p>Oil palm grower, Middle East & Africa</p>	<p><i>“Not only send data and be transparent to its members but all the actors surrounding the RSPO domain.”</i></p> <p>Oil palm grower, Middle East & Africa</p>

Q. How can RSPO improve their communication and engagement with you? OPEN QUESTION

Base: All participants (n=571)

Challenges & opportunities

05



echo

CHALLENGES FOR RSPO

Smallholder inclusion and compliance regulation are among the main challenges for RSPO

Smallholder engagement & inclusion

*“Ensure that **small producers** are **effectively included** in the RSPO certification process, **recognizing their significant role** in the palm oil industry.”*

Oil palm grower, Latin America & Caribbean

Legislation and regulation compliance

*“The update of the standards and support around the **new regulations** (e.g., EUDR) and ever-changing landscape.”*

Consumer goods manufacturer, Europe

Climate change and the environment

*“Support the initiatives outlined in the **UN Global Compact on environmental sustainability**.”*

Palm oil processor & trader, Latin America & Caribbean

Cost & economic viability

*“The **high cost** of certification that **creates reluctance** for palm oil businesses to join the RSPO.”*

Palm oil processor & trader, Asia Pacific

Market access and demand

*“Managing **supply** in the face of **demand** that is incompatible with sustainable cultivation principles.”*

Supply chain associate/manager, Europe

Q. What do you consider to be the main challenges for RSPO and sustainable palm oil certification over the next five years? OPEN QUESTION

Base: All participants (n=571)

OPPORTUNITIES FOR RSPO

Many of the challenges are also seen as opportunities for RSPO. Consumer awareness and education is also seen as a key opportunity

Compliance with legislation & regulations

*“Helping stakeholders **demonstrate compliance** with EUDR.”*
Supply chain associate/manager, Europe

Consumer awareness & education

*“**Awareness and knowledge** of the public about the **importance** of sustaining our environment and forest”*
Supply chain associate/manager, Asia Pacific

Smallholder engagement & support

*“RSPO has an opportunity to push through **support to smallholder certification** as a way to ensure smallholders are not excluded from supply chains.”*
Consumer goods manufacturer, North America

Government collaboration & support

*“Continuing to **engage with the most influential industry associations, governments, and NGOs** as an input into RSPO's approach and to support positive reputation.”*
Consumer goods manufacturer, North America

Market access and demand

*“In the sales market, **obtaining RSPO certification** is becoming **essential** as customers increasingly **demand certification.**”*
Supply chain associate/manager, Asia Pacific

Q. What do you consider to be the main opportunities for RSPO and sustainable palm oil certification over the next five years? OPEN QUESTION
Base: All participants (n=571)

Summary & recommendations

06

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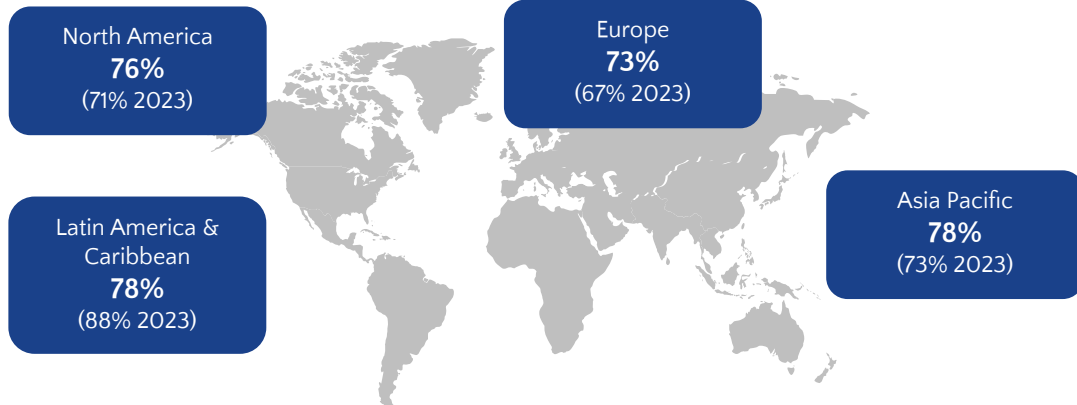
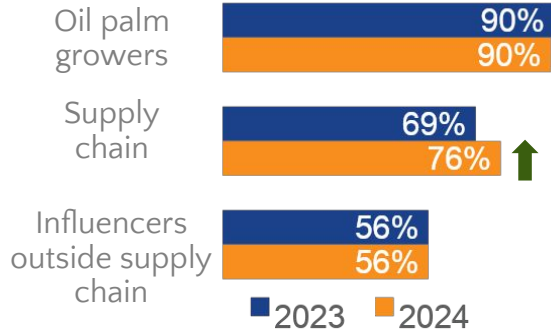
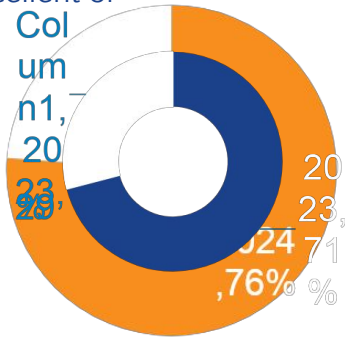
Key findings

1. **Familiarity** with RSPO improves year-on year among members and non-members
2. RSPO's **reputation** improves on 2023 with over three-quarters of participants perceiving it as good or excellent; reputation is **strongest among oil palm growers**
3. RSPO maintains excellent advocacy levels with the proportion of advocates far outweighing critics
4. There is strong agreement that RSPO is **relevant, trustworthy, credible** and has a **positive impact**. While still positive overall, member support and responsiveness are
5. **Oil palm growers** score RSPO highest on **all** reputation attributes, influencers outside the supply chain the lowest
6. Though still recognised by stakeholders are **the primary standard and certification organisation**, perceptions are weaker that RSPO provides an **independent voice** and is **engaging stakeholders at the highest level**
7. RSPO certification is perceived as being extremely **credible** but there is **less agreement** that **monitoring** and **enforcement is enforced effectively and consistently**; this in particular is seen as a weakness by influential stakeholders outside the supply chain
8. The **impact** of RSPO's certification in reducing the risk of deforestation and minimising the negative impact of palm oil cultivation is widely recognised. There is less recognition that certification reduces investment risk in the sector.
9. Three quarters of participants rate the **quality of RSPO's communication and engagement** positively, but there is room for improvement with all stakeholders
10. A third of participants are aware of RSPO's **government engagement** activities, with over three quarters agreeing that it is effective

RSPO SUMMARY DASHBOARD 2023 vs. 2024

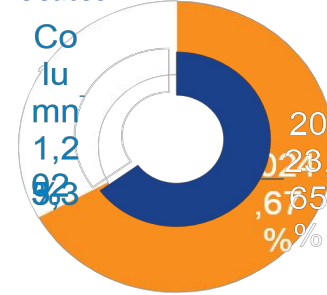
REPUTATION

% excellent or good



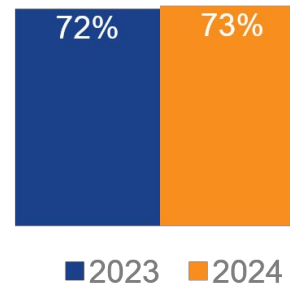
ADVOCACY

% advocates



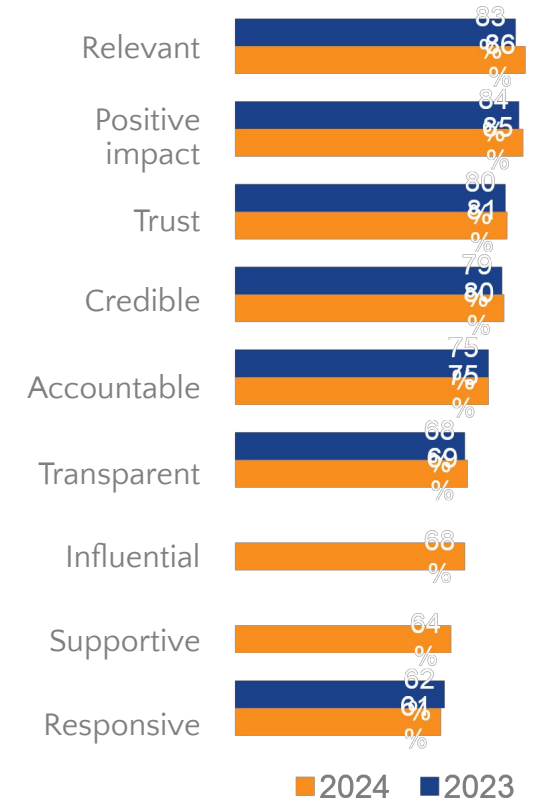
QUALITY OF COMMUNICATIONS

% good



REPUTATION DRIVERS

% agree



RSPO reputational SWOT analysis

STRENGTHS

- Overall reputation, trust and advocacy levels
- Relevance / focus on sustainability
- Leading standard setter for sustainable palm oil
- Credibility of RSPO certification
- Impact on reducing deforestation and negative impact of palm oil cultivation
- Quality of communications and effectiveness of government engagement

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WEAKNESSES

- Responsiveness – speed, quality and clarity of response
- RSPO certification monitoring and enforcement (for a vocal minority)
- Awareness of RSPO's government engagement

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OPPORTUNITIES

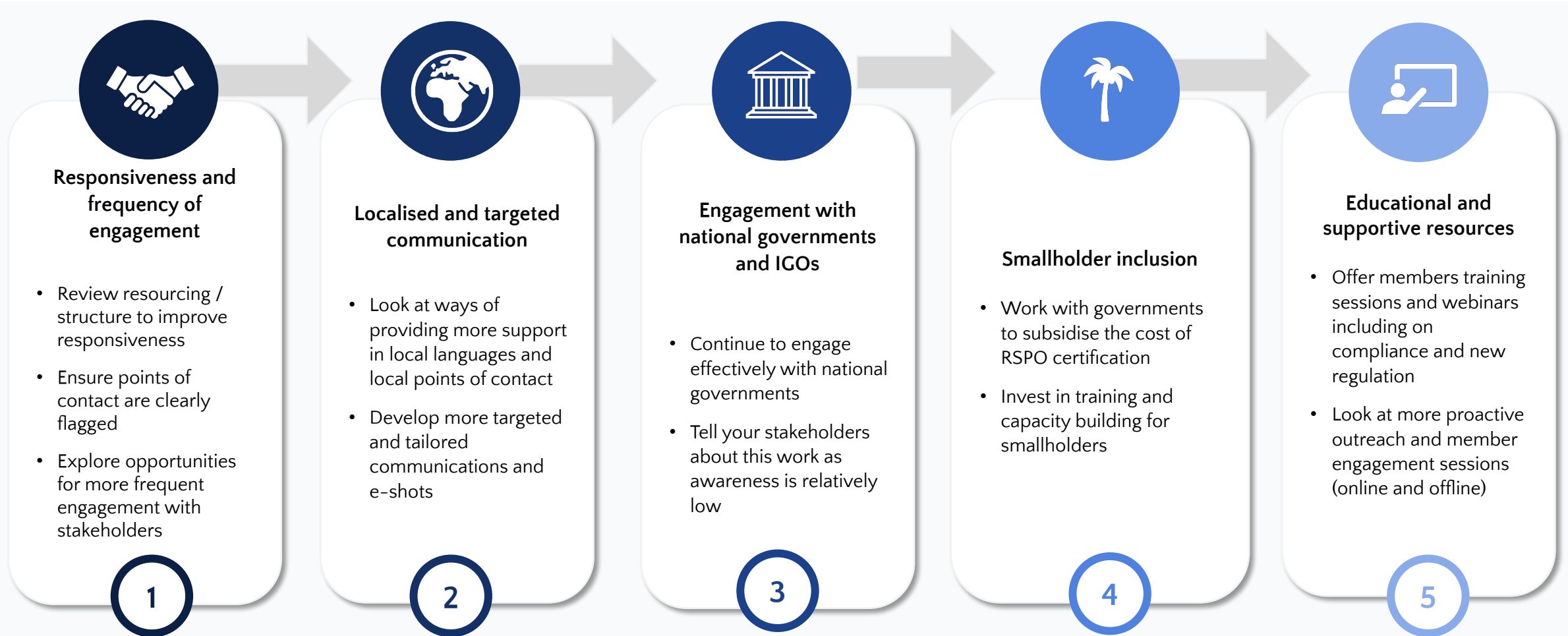
- Expand uptake of RSPO certification
- More support for smallholders – training and cost reduction mechanisms
- Promote the benefits of sustainable palm oil
- More engagement at a governmental level
- Engage in more languages / locally and more frequently

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- Cost to growers of membership / compliance
- Alignment with EU and other legislation
- Achieving government recognition and support
- Lack of demand for sustainable palm oil outside Europe and the US

Recommendations for RSPO's communications and engagement



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AIM FOR BETTER

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