

# EUROPEAN SOY MONITOR

.....  
Insights on the European  
uptake of responsible and  
deforestation-free soy in 2019



the sustainable  
trade initiative



**Prepared by Schuttelaar  
& Partners for IDH, The  
Sustainable Trade Initiative.**

**Important Notice on Contents  
– Estimations and Reporting.**

All information in this report is derived or estimated using both proprietary and publicly available information. Where information has been obtained from third party sources and proprietary sources, it is clearly referenced. The following authors and IDH staff contributed to the report: Ronald Hiel, Doutzen Wagenaar, and Ruth de Jong from Schuttelaar & Partners, and Guilherme do Couto Justo and Margaux Duchâtel

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IDH, The Sustainable Trade Initiative is an international

organization that convenes, finances, and manages large programs to accelerate transitions toward sustainability in partnership with multinational and smaller companies, governments, and civil society. Headquartered in the Netherlands, IDH delivers scalable, economically viable impact on the Sustainable Development Goals. IDH operates globally in different industry sectors ranging from cocoa and tea to cotton and soy, and encourages joint investment in innovative models to realize long-term solutions for environmentally and socially sustainable production and trade.

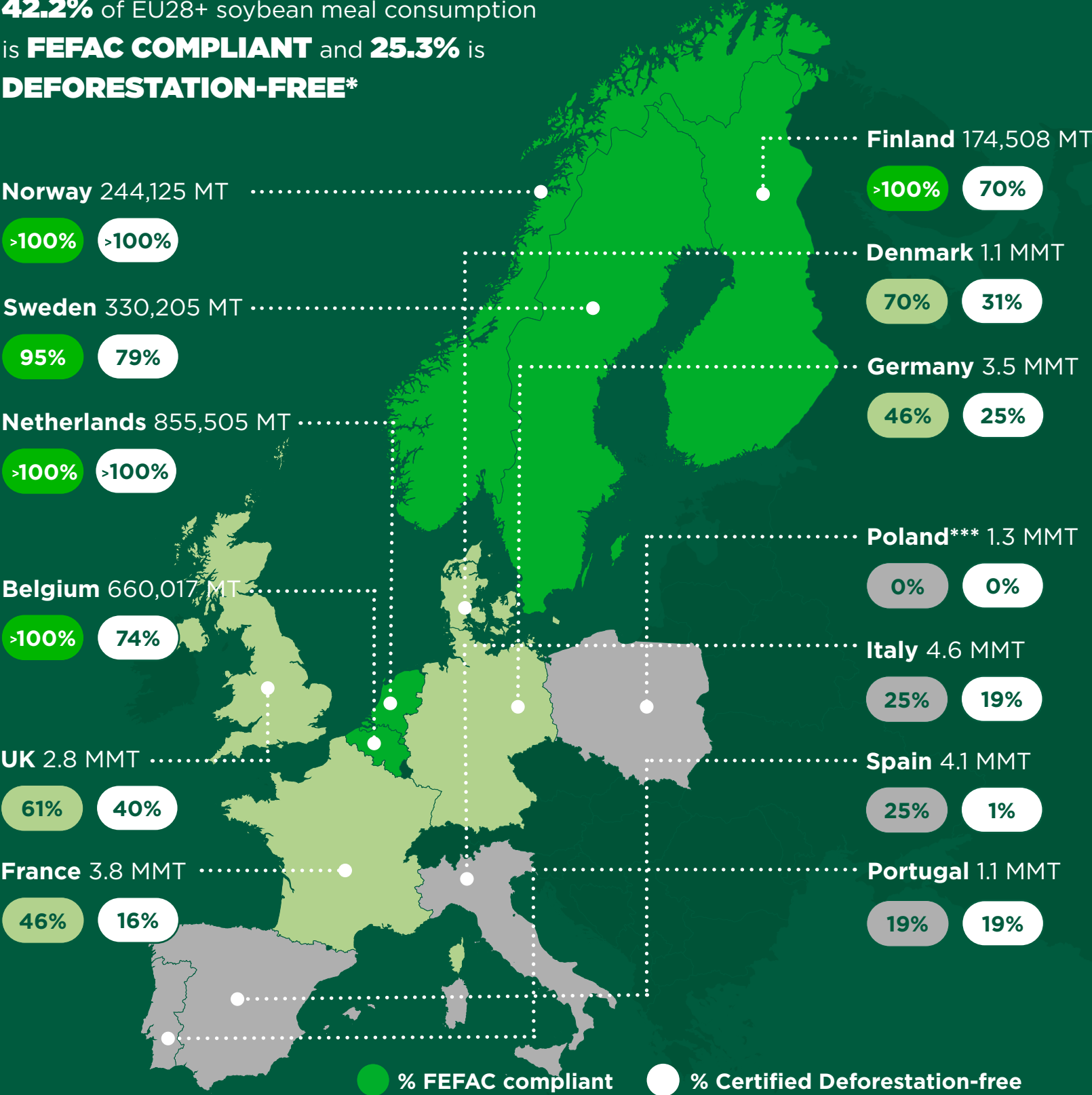
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# European consumption of responsible and deforestation-free soy in 2019

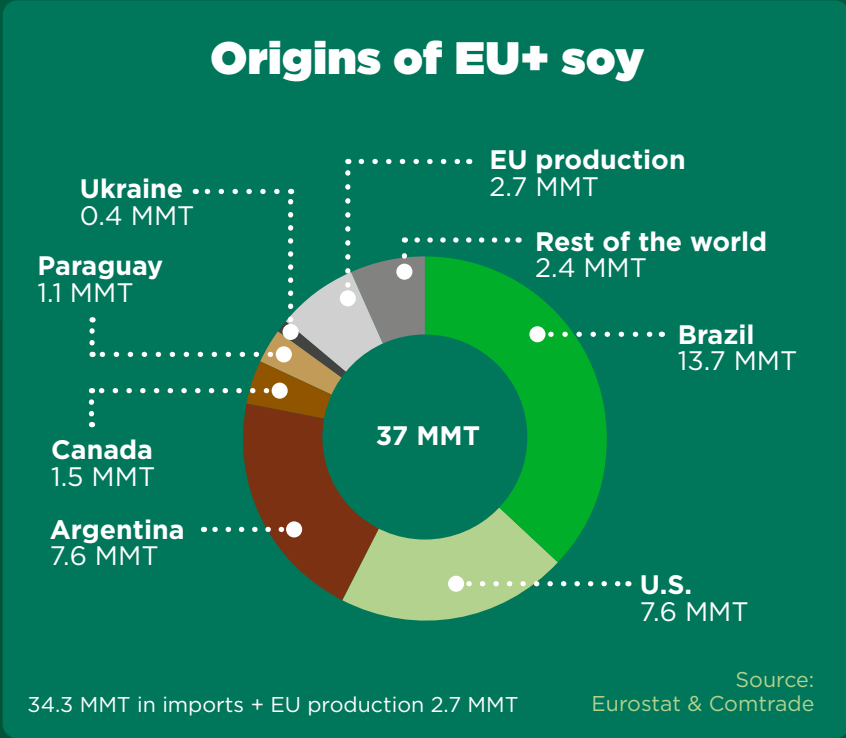
**42.2%** of EU28+ soybean meal consumption is **FEFAC COMPLIANT** and **25.3%** is **DEFORESTATION-FREE\***



Due to methodological differences a one-on-one comparison with last year's report is not entirely possible.

\*For the calculation of deforestation-free we only took into account the volumes under the schemes which have been benchmarked by IUCN/ Profundo as deforestation-free (RTRS, Proterra, ISCC+, Danube / Europe Soy, CRS/BFA and SFAP- Non Conversion). \*\*Net import of soybeans in soybean meal equivalents 11.9 MMT + net import of soybean meal 18.3 MMT + own soy production in soybean meal equivalents 2.2 MMT. All calculated in soybean meal equivalent. \*\*\*No information available.

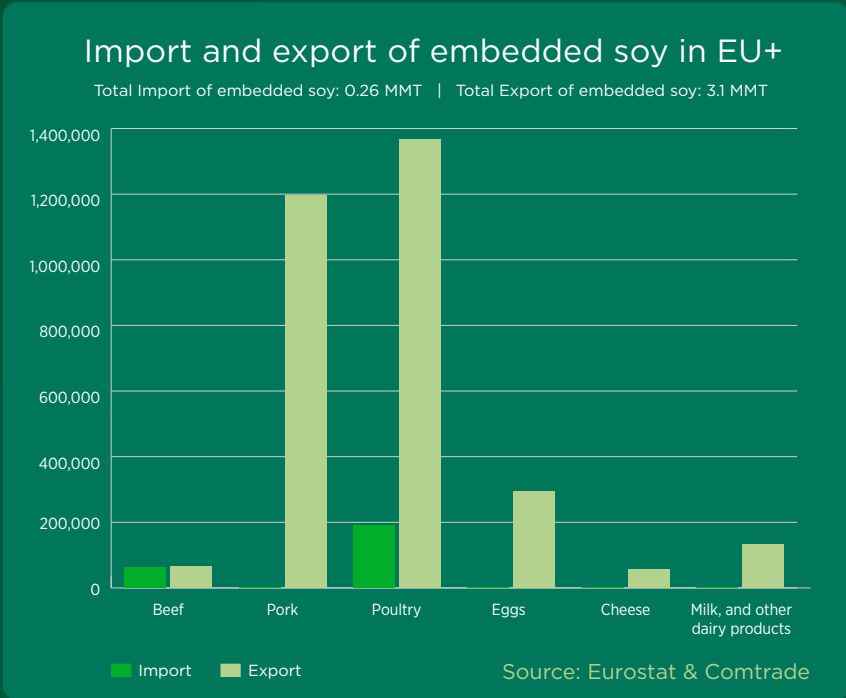
## EUROPE OVERVIEW



**32.43 MMT**  
Soybean meal available\*\*

**2.85 MMT**  
EU+ net export embedded soy

**29.58 MMT**  
EU+ soybean meal consumption  
 $32.43 - 2.85 = 29.58$



FEFAC estimated that **80.4%** of EU soy imports are from **low deforestation risk areas**

## GLOBAL OVERVIEW

**334 MMT**  
global soy production

**33 MMT**  
is FEFAC SSG compliant soy

**120.5 M**  
hectares total production





# Preface

**With this third Soy Monitoring report, I am glad to introduce new data on the uptake of FEFAC Soy Sourcing Guidelines compliant and deforestation-free soy in 2019. The uptake of certified soy in 2019 is slightly higher than in 2018. This report is a summary of the most vital developments and figures in the soy market of 2019. It bridges the gap between 2018 and 2020, as we will publish the 2020 report by the end of this year.**

Soy is among the most crucial commodities in its potential for impact on both the social and environmental agendas. IDH is working closely with its public and private partners to create transformation towards more sustainable production patterns. To create this change,

accurate and reliable insights are essential. It is vital to carefully take into consideration the large importers that process soy in producing countries and ship the soy to other countries; to choose appropriate conversion factors for embedded soy; to prevent double counting when companies in the same supply chain cover their soy footprint with certificates and to account for responsible soy that is lost along the supply chain.

Given the challenges to account for these factors in reliable and comparable data, which trends shine through? It is clear to me that there is still significant room for supply chain actors to take bolder action and advocate for responsible soy. A better balance is needed in some market segments and countries for real and meaningful action. It is concerning to see the discrepancy between different countries, especially by those that are signatories of the Amsterdam Declaration Partnership and committed to leading this movement across the EU. From a policy perspective, the European Green Deal and the EU-wide due diligence law to respect human rights and the environment, expected to be issued this

summer, will demand businesses to take a completely different approach in their supply chains and concrete actions towards a more sustainable supply chain.

Nonetheless, there are promising developments. For instance, the work that we are doing on the ground in Brazil with local stakeholders in the landscape. We have seen farmers working towards the transition to more sustainable productive systems by adopting no-till and integrating crops & livestock and their openness to partnerships with private sector actors that will help accelerate this transition. I am glad to see that the countries with collective action plans for responsible soy are now working together under the flag of the European National Soy Initiatives (ENSI). I am proud of our sustainable sourcing platform **SourceUp** that connects committed buyers to landscape initiatives globally and helps them source at scale in line with sustainability commitments. I see positive developments in transparency such as the **Accountability Framework** and the work of the **Soy Transparency Coalition**. Not to mention the various developments in

collective action to monitor land conversion and to compensate farmers that want to refrain from expansion.

Many of the solutions we need to transition to responsible soy are there, the next step is to ensure commitments are translated into time-bound purchase requirements. In 2020 we called upon the entire sector to act, underlining the urgency of action required both in European consumer countries and in producer countries, and by actors along the entire value chain. The solutions are there, action needs to be taken now.



> Daan Wensing  
CEO IDH, The Sustainable Trade Initiative





# Definitions

## FEFAC compliant soy

Soy that is certified under one of the 19 standards that are positively benchmarked against the FEFAC Soy Sourcing Guidelines 2015 (in 2021 a new version of the Guidelines has been published). These standards can be found on [www.sustainabilitygateway.org/european-feed-manufacturers-federation-fefac-soy-benchmarking-tool](http://www.sustainabilitygateway.org/european-feed-manufacturers-federation-fefac-soy-benchmarking-tool).

## Certified deforestation-free soy

Soy that is certified under one of the 6 standards that are indicated in the 2019 Profundo benchmark study (Setting the bar for deforestation-free soy: Proterra, RTRS, SFAP non-Conversion, Danube Soy, ISCC soy and CRS/BFA) as deforestation-free soy standards. Although the study also focuses on wetlands and HCVA's, we will stick to the term deforestation-free instead of conversion-free.

## Low-deforestation risk soy

Soy that originates from countries or regions with a small risk of deforestation or land conversion. The risk-categories are developed by FEFAC in cooperation with international experts.

## Soybean meal available for domestic consumption

The reference volume for the calculation of FEFAC compliant and deforestation-free soy. The available soybean meal for domestic consumption is calculated by summing all soy imports and own soy production, subtracting soy exports and adding the net-import or net-export of embedded soy.





## Uptake of responsible soy in 2019

The world's soybean production declined to 334 million ton in 2019 compared to the 359 million ton in 2018. Brazil was by far the biggest supplier of soy products to EU28+ (EU28, Switzerland and Norway), followed by the United States and Argentina. Looking at the uptake of FEFAC Soy Sourcing Guidelines compliant (referred

to as FEFAC compliant) soy in EU28+, we notice a slight overall increase in the uptake of FEFAC compliant and conversion-free soy; however, for most of the individual countries in this report, a minor decline in FEFAC compliant and conversion-free soy can be observed. In 2019, the attention for tackling deforestation and

conversion increased and new initiatives advocating for responsible soy emerged. However, the conversion of natural ecosystems such as the Cerrado, the Gran Chaco and major parts of Paraguay continued. Furthermore massive forest fires in Brazil were dominating the international news, highlighting

the vulnerability of natural ecosystems. Therefore, it remains of vital importance for all supply chain actors to translate their no-deforestation commitments into clear purchase conditions.





**1,044,317 MT SOYBEAN MEAL**  
available for the Belgian livestock sector

—

**384,300 MT NET EXPORT**  
embedded soybean meal

=

**660,017 MT DOMESTIC**  
soybean meal consumption

**>100%**  
of domestic  
soybean meal  
consumption **FEFAC**  
**SSG compliant.**

**74%**  
of domestic  
soybean meal  
consumption  
deforestation-free.



**1,518,347 MT SOYBEAN MEAL**  
available for the Danish livestock sector

—

**467,773 MT NET EXPORT**  
embedded soybean meal

=

**1,050,574 MT DOMESTIC**  
soybean meal consumption

**70%**  
of domestic  
soybean meal  
consumption **FEFAC**  
**SSG compliant.**

**31%**  
of domestic  
soybean meal  
consumption  
deforestation-free.

## Global and European soy trade

In 2019, 120 million hectares were dedicated to soy production worldwide compared to 125 million in 2018.<sup>1</sup> In addition to a reduction of hectares planted, extreme weather conditions resulted into yield losses, especially in the United States.<sup>2</sup> Brazil on the contrary, experienced a significant production increase<sup>3</sup> which also explains their more dominant export position of soy products to the EU28+. As a result of the trade tensions between China and the United States, China<sup>4</sup> scaled up its own soy production with an increase of 13% to 18.1 million tonnes. In August 2018 the first signals of African Swine Fever were reported in China, the emergence of the disease had dramatical consequences for the swine population worldwide in 2019. Consequently, also impacting the demand for and price of soy. Soybean production in the European Union was 2.7 million tons, remaining rather stable over the years despite the ambition of the EU to produce more protein crops.<sup>5</sup>

## Available soybean meal consumption

In this report, the calculations are made with the soybean meal that is available for consumption in the EU28+ or in a specific country as the reference. To calculate the soybean meal available for domestic consumption, the imported and exported soybeans and soybean meal, the production of soybeans in EU28+ and the embedded soy imported and exported are taken into account as can be shown in Table 1. All volumes of soybeans are converted into soybean meal using a conversion factor of 0.8.

In 2019, EU28+ imported more than 15 million tonnes of soybeans and almost 19 million tonnes of soybean meal. Export of soybeans and soybean meal to countries outside EU28+ was with 243.880 tonnes of beans (195.104 tonnes of soybean meal equivalents) and 461.408 tonnes of meal very small. Most of the soybeans and soybean meal imported to the EU28+ remain in EU28+ for crushing and use in feed, food or fuel. In addition to direct soy imports, also embedded

**Table 1** Calculation of soybean meal available to the EU28+ in 2019 in tonnes

Import (tonnes)		Export (tonnes)		Net import (tonnes)
Import soybeans to EU28+ (x0.8)	12,091,932	Export soybeans from EU28+ (x0.8)	195,104	11,896,828
Import soybean meal to EU28+	18,797,295	Export soybean meal from EU28+	461,408	18,335,886
EU28+ soybean production (x0.8)	2,193,600			2,193,600
<b>Soybean meal available for EU28+ market</b>				<b>32,426,314</b>
<b>Import embedded soy to EU28+</b>	<b>263,087</b>	<b>Export embedded soy from EU28+</b>	<b>3,114,065</b>	<b>-2,850,978</b>
<b>Total soybean meal available for consumption in EU28+</b>				<b>29,575,336</b>

soy is imported to EU28+ (263.087 tonnes of embedded soy), whilst export of embedded soy is with more than 3 million tonnes significantly higher – showing the important role of the EU28+ in animal based production.

## FEFAC compliant soy

Table 2 provides an overview of the certified and sold volumes under the positively benchmarked standards. The total production of FEFAC compliant soy increased tremendously to over 33 million tonnes. The significant increase was almost entirely caused by the increase of soy reported under the American SSAP program (increase of 10 million tonnes). Of the 33 million tonnes certified, 15.6 million tonnes were estimated to end up in EU28+, which is an increase of 1.45 million tonnes compared to 2018. For most of the standards, EU28+ is the only or main end market. Note that we consider the 15.6 million tonnes of soybeans for EU28+ (12.5 million tonnes of soybean meal) as our reference, whether or not all this soy was actually recognised as responsible soy until the end of the supply chain. Of the total soybean meal available for consumption in the EU28+ (29.6 MMT); 42,2% was FEFAC compliant soy. This is higher than the 38% in 2018.



European soybean meal consumption

This report focuses on soybean meal available for domestic consumption at the EU28+ level and at the level of individual countries. Soybean meal available for domestic consumption is calculated by adding the import of soybean meal and soybeans (converted into meal), the European soybean production (converted into meal) and the import of embedded soy and subtracting the soybean meal and soybean export and the embedded soybean meal exported. In the annexes provided online for EU28+ and for individual countries, all detailed Eurostat and Comtrade data can be found and a detailed overview of the steps taken to calculate the percentage.

Five soy standards were able to sell more certified soy in EU28+, Cargill with its Triple-S programme, Donau Soja/Europe Soya, Proterra, RTRS and ISCC+. Where five others, Agricultura Certificada, Amaggi, CRS, SFAP Non-Conversion and SSAP reported a very similar or slightly lower uptake. Although, RTRS certified a lower volume (minus 500,000 tonnes) than in 2018, the absolute uptake of both certificates and physical soy was higher. In addition, certificates from 2018 were sold in 2019. For the non-GMO standards Proterra, Donau Soja/Europe Soya, it remained a challenge to sell all soy as non-GMO and sustainably produced soy in 2019. Although uptake was better than in 2018. Similar to 2018, some of the traders were reluctant to report on their soy program's volumes, origins and destinations, with Cargill, Amaggi and Cefetra as the only exceptions. Some of the traders informed us that there is a lack of demand for their own FEFAC compliant soy scheme, whereas the demand increased for traceable and conversion-free soy. It appears that many of the traders focus on selling RTRS and other dominant certified soy standards and in addition begin to offer their own solutions for conversion-free and traceable soy. We expect that trend will continue to grow in the future.

Table 2 Certified FEFAC compliant soy per benchmarked standard

Name	Producing countries	Total volume certified soybeans globally (tonnes in beans)	Destined for EU28+ (tonnes in beans)
Agricultura Certificada	Argentina	350,000	80,000
Amaggi	Brazil	59,000	0
Cargill Triple-S	Brazil	317,000	200,000
Cefetra CRS	Brazil, Argentina and Paraguay	621,000	633,226*
Donau Soja + Europe Soya	Italy, Ukraine, Romania, Serbia, Austria, Russia, Croatia, Hungary, Poland, Switzerland, Germany	675,000	675,000
Proterra	US, Argentina, Ukraine, Brazil, Canada, Indonesia, Uruguay, Germany, Italy, Russia	2,988,373	2,988,373
RTRS	Brazil, Argentina, Paraguay, China and India	4,085,655	3,652,006***
Sustainable Farming Assurance Program	Brazil	470,000	470,000
US Soy Sustainability Assurance Protocol (SSAP)	United States	22,888,032	5,930,000
ISCC+	Argentina, Austria, Bosnia and Herzegovina, Brazil, Czech Republic, Greece, Croatia, Hungary, Paraguay, Romania, Serbia, Slovenia, Slovakia, Ukraine	1,160,156	1,000,000
ADM responsible soybean standard	No info.	No info.	No info.
Bunge Pro-S	No info.	No info.	No info.
FEMAS	No info.	No info.	No info.
Louis Drefus Company	No info.	No info.	No info.
Programma Coamo	No info.	No info.	No info.
Total in beans		33,614,216	15,628,605
Total in meal (x0.8)		26,891,373	12,502,884

\*Including some uptake of 2018 soy. \*\*We will not report sepeately about the BFA standard because it includes RTRS, SFAP and CRS. The Sustainable Feed Standard does not exist anymore and was also removed from the list. \*\*\*Total uptake of Book & Claim and Mass Balance volumes by European companies, this figure can include some certificates from 2018.



154,535 MT SOYBEAN MEAL  
available for the Finnish livestock sector

+

19,974 MT NET IMPORT  
embedded soybean meal

=

174,508 MT DOMESTIC  
soybean meal consumption

>100%  
of domestic  
soybean meal  
consumption FEFAC  
SSG compliant.

70%  
of domestic  
soybean meal  
consumption  
deforestation-free.



3,809,258 MT SOYBEAN MEAL  
available for the French livestock sector

-

4,365 MT NET EXPORT  
embedded soybean meal

=

3,804,893 MT DOMESTIC  
soybean meal consumption

46%  
of domestic  
soybean meal  
consumption FEFAC  
SSG compliant.

16%  
of domestic  
soybean meal  
consumption  
deforestation-free.





**3,610,193 MT SOYBEAN MEAL**  
available for the German livestock sector

—

**63,901 MT NET EXPORT**  
embedded soybean meal

=

**3,546,292 MT DOMESTIC**  
soybean meal consumption

**46%**  
of domestic  
soybean meal  
consumption **FEFAC**  
**SSG compliant.**

**25%**  
of domestic  
soybean meal  
consumption  
**deforestation-free.**



**4,238,864 MT SOYBEAN MEAL**  
available for the Italian livestock sector

+

**340,349 MT NET IMPORT**  
embedded soybean meal

=

**4,579,213 MT DOMESTIC**  
soybean meal consumption

**25%**  
of domestic  
soybean meal  
consumption **FEFAC**  
**SSG compliant.**

**19%**  
of domestic  
soybean meal  
consumption  
**deforestation-free.**

## Deforestation and conversion-free soy

The launch of the Accountability Framework in June 2019 brought the discussion about deforestation and conversion-free commodities to a new level, thanks to clear definitions of concepts such as conversion, deforestation, forests and natural ecosystems. In this report we will attempt to consequently talk about deforestation and conversion free soy following the definitions of the Accountability Framework.

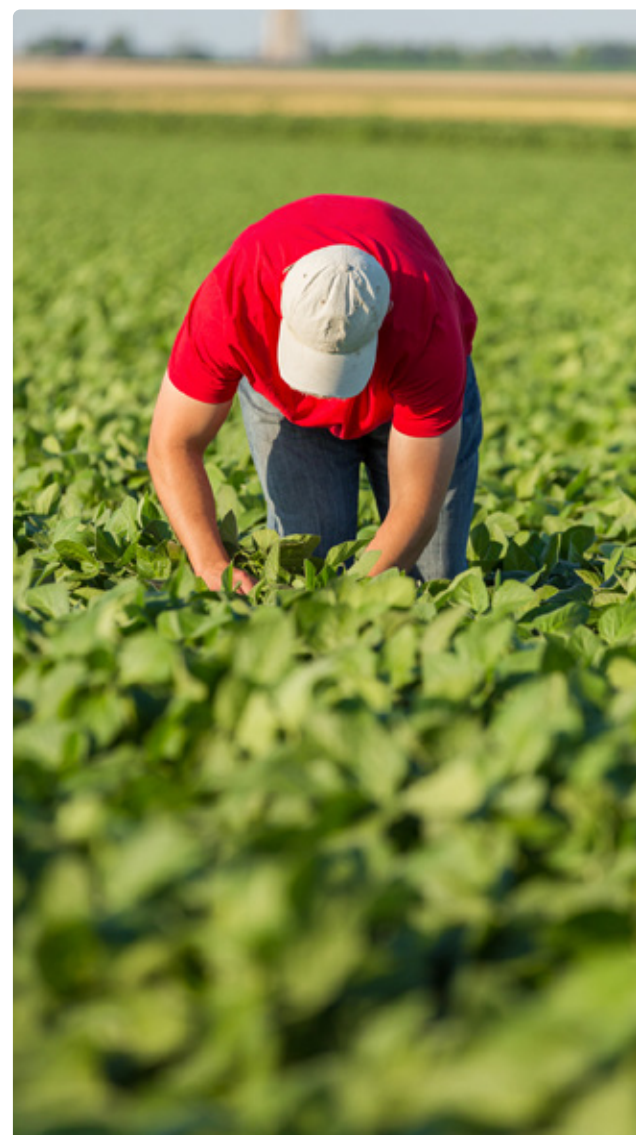
## Deforestation and Conversion-free soy in EU28+

In the 2017 and 2018 report, six of the FEFAC compliant soy standards were considered to offer soy that was produced in a way that protected forests, wetlands, and high-conservation value areas in a robust manner. Those are RTRS, ISCC+, Proterra, Donau Soja/ Europe Soya, CRS and SFAP Non-Conversion; together accounting for 9,418,605 tonnes of soy (7,534.884 tonnes of meal) in 2019. That means that of the total 15.6 million tonnes of FEFAC compliant soy destined for the European market (EU28+), more than half (60%) was certified deforestation-free. Correspondingly, of the total soybean meal available for consumption in the EU28+ (29.6 MMT); 25,3% (7.5/29.6) was deforestation-free soy.

The benchmark to identify the deforestation and conversion-free standards will be renewed in 2021 via the Transparency Tool aligned with the new FEFAC Soy Sourcing Guidelines and the benchmark against those Guidelines. Until the new benchmark results are available, we report on certified deforestation-free soy (the six schemes) and on soy coming from areas with a low risk of conversion, using the risk-classification as provided by FEFAC. FEFAC's

team of international experts indicated that there is a possible risk of conversion regarding soy from the Brazilian Cerrado, Paraguay and the Argentinean Gran Chaco. This does not entail that all soy from these areas is produced with conversion, on the contrary, this is often a small percentage (<5%). The percentages below show the expected volume of European soybean and soybean meal imports from these regions. Meaning that from all soy from Brazil, an estimated 50% is from the Cerrado.

Brazil - Cerrado	50%
Paraguay	16%
Argentina - Gran Chaco	3%



**2,027,792 MT SOYBEAN MEAL**  
available for the Dutch livestock sector

—

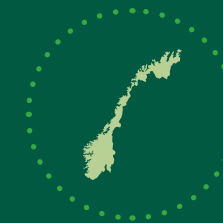
**1,172,287 MT NET EXPORT**  
embedded soybean meal

=

**855,505 MT DOMESTIC**  
soybean meal consumption

**>100%**  
of domestic  
soybean meal  
consumption **FEFAC**  
**SSG compliant.**

**>100%**  
of domestic  
soybean meal  
consumption  
**deforestation-free.**



**210,891 MT SOYBEAN MEAL**  
available for the Norwegian livestock sector

+

**3,420 MT NET IMPORT**  
embedded soybean meal

=

**244,125 MT DOMESTIC**  
soybean meal consumption

**29,814 MT DOMESTIC**  
soybean meal consumption for farmed-fish

**>100%**  
of domestic  
soybean meal  
consumption **FEFAC**  
**SSG compliant.**

**>100%**  
of domestic  
soybean meal  
consumption  
**deforestation-free.**





**2,582,040 MT SOYBEAN MEAL**  
available for the Polish livestock sector

—

**1,307,336 MT NET EXPORT**  
embedded soybean meal

=

**1,274,704 MT DOMESTIC**  
soybean meal consumption

**0%**  
of domestic  
soybean meal  
consumption **FEFAC**  
**SSG compliant.**

**0%**  
of domestic  
soybean meal  
consumption  
**deforestation-free.**



**965,943 MT SOYBEAN MEAL**  
available for the Portuguese livestock sector

+

**101,513 MT NET IMPORT**  
embedded soybean meal

=

**1,067,457 MT DOMESTIC**  
soybean meal consumption

**19%**  
of domestic  
soybean meal  
consumption **FEFAC**  
**SSG compliant.**

**19%**  
of domestic  
soybean meal  
consumption  
**deforestation-free.**

Taking these percentages and the total EU28+ imports, an estimated 7.3 million tonnes of the total 37 million tonnes are coming from regions where a risk of deforestation can be present. The remaining 29.7 million tonnes are from low-risk areas. That means that 19,6% comes from high and 80,4% comes from low-risk areas. As soon as traceability in the supply chain improves, the risk of actual exposure to a conversion-risk can be determined with more accuracy. The Trase tool (at the moment of writing up to date until 2018) can also be of support in obtaining better estimations of the volume of low-risk soy imports.

### Summary: EU28+ uptake of FEFAC compliant and deforestation-free soy

Assessing the aggregated information from all benchmarked soy schemes and the calculated soybean meal available for consumption in the EU28+, a slight increase in the uptake of FEFAC compliant and deforestation-free soy can be observed (from 38 to 42% and from 19% to 25%).



### Developments per country

For the analysis per country, in addition to Eurostat and Comtrade data, the figures provided by the national feed associations (the FEFAC members) are also used as a starting point. The associations collected and aggregated the information from their members. Where possible, the data from the soy standards was used to further substantiate this figure – here information provided by RTRS was especially valuable. In the annexes detailed information per country can be found whereas the infographics per country in this report provide a brief overview of direct and embedded soy available in the country.

**The countries with a National Soy Initiative (e.g. the Netherlands, Sweden, the United Kingdom, Norway) or with collective arrangements for buying responsible soy (such as Belgium) perform better than the ones without.** In addition, for those countries where there was no data available in 2017 and 2018, this remained the case for the 2019 report. There are substantial barriers in collecting the data. These barriers are mainly rooted in the fact that there is often no traceability of responsible soy in the supply chain and that some companies consider the actual uptake of responsible soy confidential/competitive information.

### Developments in the area of landscape protection and joint action

The uptake of FEFAC compliant soy is increasing, possibly also caused by an increased attention for conversion-free soy. In the summer of 2019, forest fires in the Amazon dominated the news and various actors called for urgent action. Despite some attempts to remove the Amazon Moratorium, it remained in place and is effectively protecting the forest from deforestation. Increasingly, stakeholders focus their attention on Brazil's Cerrado. In February 2019, the Soft Commodities Forum, in which all major traders are organized, announced a commitment to a common framework for



**5,158,302 MT SOYBEAN MEAL**  
available for the Spanish livestock sector

—

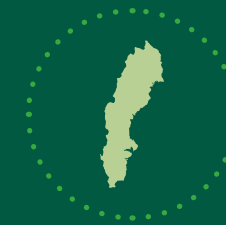
**1,044,210 MT NET EXPORT**  
embedded soybean meal

=

**4,114,092 MT DOMESTIC**  
soybean meal consumption

**25%**  
of domestic  
soybean meal  
consumption **FEFAC**  
**SSG compliant.**

**1%**  
of domestic  
soybean meal  
consumption  
**deforestation-free.**



**247,601 MT SOYBEAN MEAL**  
available for the Swedish livestock sector

+

**82,604 MT NET IMPORT**  
embedded soybean meal

=

**330,205 MT DOMESTIC**  
soybean meal consumption

**95%**  
of domestic  
soybean meal  
consumption **FEFAC**  
**SSG compliant.**

**79%**  
of domestic  
soybean meal  
consumption  
**deforestation-free.**





**2,540,294 MT SOYBEAN MEAL**

available for the UK livestock sector

+

**267,270 MT NET IMPORT**

embedded soybean meal

=

**2,807,564 MT DOMESTIC**

soybean meal consumption

**61%**

of domestic  
soybean meal  
consumption **FEFAC**  
**SSG compliant.**

**40%**

of domestic  
soybean meal  
consumption  
**deforestation-free.**

regular reporting and monitoring of progress on transparent, traceable, and quantifiable soy supply chains in the Cerrado. In addition, the Forum announced to cooperate with the Cerrado Working Group (Grupo de Trabalho do Cerrado -GTC) to design appropriate financial incentives to compensate farmers that refrain from their legal right to convert part of their land.

In addition to the discussion on traceability and conversion, the question arises whether farmer certification is effective to tackle overarching issues in the landscape. It is clear that land conversion is a multi-faceted issue in which various stakeholders are involved. Certification rewards farmers for environmental protection, whilst also helps them to professionalize their business and implement best agricultural practices. When certified farmers work together, dedicated supply chains with responsible and conversion-free soy can be built, also from higher risk regions. In Brazil, RTRS farmers are already working together to create such supply chains. In addition to certification, joint action at the landscape level is needed to cover the complex issue of conversion. Hence, it is promising to see that at local level (e.g. state or municipality), multistakeholder initiatives start to emerge which set joint targets and actions to produce more responsible soy, protect the ecosystem and include local actors in the value creation in the region. In the future, these biome-based and local landscape approaches are likely to become important instruments in the protection of valuable ecosystems and guaranteeing verified responsible sourcing of crops.<sup>6</sup>

## Conclusions and recommendations

This 2019 update shows an overall increase in uptake of FEFAC compliant and conversion-free soy, but also a decrease in some countries. Overall it is clear that more action is needed from the different supply chain actors to increase the up-take of responsible soy in the European market.

### For FEFAC compliant standards:

- Improve transparency about certified volumes and production regions.
- Improve transparency about supply chain models. In case of Book & Claim certificates, communicate clearly about the trading system used to sell these certificates, the customers and the final users/owners of the certificates.
- Improve traceability of certified soy in the supply chain, in cooperation with the supply chain actors.

### For feed companies:

- Commit to the Responsible Sourcing Declaration as proposed by FEFAC and proactively offer FEFAC compliant soy in feed products.
- Discuss a time-bound plan with downstream actors in the supply chain to move from Book & Claim to physical supply chain solutions.
- Align with your National Soy Initiative to make impact at scale.

### For traders:

- Make use of the Accountability Framework to specify the no-deforestation or no-conversion commitment.
- Discuss a time-bound plan with downstream actors in the supply chain to move from Book & Claim to physical supply chain solutions.
- Align with your National Soy Initiative to make impact at scale.
- Explore options with competitors to pool conversion-free soy in the supply chain to create segregated flows of conversion-free soy.

### For food companies & retailers:

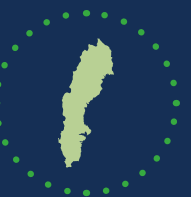
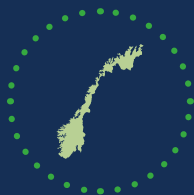
- Make use of the Accountability Framework to specify the no-deforestation or no-conversion commitment.
- Make a clear reference to FEFAC compliant and conversion and deforestation-free soy in the purchase conditions.
- Agree upon a time-bound plan to move to solutions in the physical supply chain.
- Align with your National Soy Initiative to make impact at scale.

We also like to point your attention to the recommendations as provided by in IDH's report **The urgency of tackling tropical deforestation** on avoiding deforestation and land conversion in supply chains.





# Annex





Belgium

Calculation percentage FEFAC compliant soy

The Belgian Feed Association reported that 365,000 tonnes of FEFAC compliant soy (CRS, SFAP and 180,000 tonnes of RTRS) was acquired by the animal feed industry in 2019. In addition, via imports of compound feed from the Netherlands another 220,000 tonnes of FEFAC compliant soy was used in Belgium. This makes a total of 585,000 tonnes of FEFAC compliant soy used in the feed industry. In addition, also other actors in the Belgium food chain acquired RTRS certificates (122,895 tonnes). This means that in total **107%** of the domestic soybean meal consumption was **FEFAC compliant** (707,945 tonnes / 660,017 tonnes).

Calculation percentage conversion-free soy

All 3 standards (RTRS, BFA and SFAP) used by the Belgian Feed industry are considered to provide conversion-free soy. This is in total 365,000 tonnes. The RTRS certificates bought by other Belgian food companies and retailers add up to 122,895 tonnes. The percentage of the imported soybean meal volume in compound feed coming from the Netherlands which is verifiable conversion free is unknown and for that reason cannot be taken into account. As a result we estimate that at least **74%** of the domestic soybean meal consumption is **conversion-free** (487,895 / 660,017).

Soybean meal available for the Belgium livestock sector

In tonnes	Import	Export	Net available
Soybean meal	1,323,408	557,170	766,238
Soybeans x 0,8	437,443	159,364	278,079
Net availability			1,044,317

Source: Eurostat

Calculation of embedded soybean meal footprint

	Import			Export		
	Animal products (tonnes)	Soy conversion factor	Embedded soy (tonnes)	Animal products (tonnes)	Soy conversion factor	Embedded soy (tonnes)
Beef	58,375	0.29	16,929	131,252	0.29	38,063
Pork	86,451	0.44	38,038	674,432	0.373	251,563
Poultry	297,567	0.8217	244,510	511,418	0.824	421,409
Cheese	336,838	0.3574	120,386	250,140	0.447	111,813
Eggs	236,203	0.3935	92,946	125,128	0.405	50,677
Other dairy products	1,749,940	0.03574	62,543	1,926,798	0.0447	86,128
Total			575,352			959,652
Net export						384,300

This leads to a domestic soybean meal consumption of:

1,044,317

–

384,300

=

660,017 MT

Denmark

Calculation percentage FEFAC compliant soy

According to the Danish feed association Dakofo, its members used 400,000 tonnes of **FEFAC compliant** soy. The feed industry did not buy RTRS certificates. Other Danish actors in the food chain (a.o. Arla) bought 330,211 RTRS certificates. Together, this corresponds to **70%** of the domestic soybean consumption (730,211 tonnes / 1,050,574 tonnes).

Calculation percentage conversion-free soy

Because it is not known whether the 400,000 tonnes of FEFAC compliant soy is also conversion-free, only the 330,211 tonnes of RTRS certificates acquired by the downstream companies are taken into account. This means that the soy volume that is certified **conversion -free** is 330,211 / 1,050,574 = **31%**.

Soybean meal available for the Danish livestock sector

In tonnes	Import	Export	Net available
Soybean meal	1,551,554	63,208	1,488,346
Soybeans x 0,8	30,934	934	30,000
Net availability			1,518,347

Source: Eurostat

Calculation of embedded soybean meal footprint

	Import			Export		
	Animal products (tonnes)	Soy conversion factor	Embedded soy (tonnes)	Animal products (tonnes)	Soy conversion factor	Embedded soy (tonnes)
Beef	80,778	0.29	23,426	66,810	0.335	22,381
Pork	59,175	0.44	26,037	996,451	0.383	381,641
Poultry	76,819	0.8217	63,122	87,897	0.39	34,280
Cheese	102,207	0.3574	36,529	390,506	0.418	163,232
Eggs	11,712	0.3935	4,609	12,707	0.433	5,502
Other dairy products	286,999	0.03574	10,257	591,307	0.0418	24,717
Total			163,980			631,752
Net export						467,773

This leads to a domestic soybean meal consumption of:

1,518,347

–

467,773

=

1,050,574 MT



Finland

**Calculation percentage FEFAC compliant soy**  
The Finnish domestic soybean meal consumption is calculated as 174,508 tonnes of soybean meal in 2019. According to the Finnish feed association, its members used 110,000 tonnes of FEFAC compliant soybean meal. In addition, also Finnish food companies covered their soy footprint with RTRS certificates (in total 76,033 tonnes) That means that **107%** of the domestic soybean meal consumption was **FEFAC compliant** (186,033 tonnes / 174,508 tonnes).

**Calculation percentage conversion-free soy**  
Finland acquired in total 121,586 tonnes of RTRS certificates (certificates bought by feed and food companies). This would mean that 121,586 / 174,508 = **70%** is certified **conversion-free**.

Soybean meal available for the Finnish livestock sector

In tonnes	Import	Export	Net available
Soybean meal	135,602	0	135,602
Soybeans x 0,8	18,932	0	18,932
Net availability			154,535

Source: Eurostat

Calculation of embedded soybean meal footprint

	Import			Export		
	Animal products (tonnes)	Soy conversion factor	Embedded soy (tonnes)	Animal products (tonnes)	Soy conversion factor	Embedded soy (tonnes)
Beef	15,377	0.29	4,459	6,484	0	0
Pork	20,509	0.44	9,024	29,360	0.44	12,918
Poultry	8,439	0.8217	6,935	14,250	0.8217	11,710
Cheese	71,651	0.3574	25,608	17,173	0	0
Eggs	1,757	0.3935	691	9,661	0.3935	3,801
Other dairy products	47,175	0.03574	1,686	183,685	0	0
Total			48,403			28,429
Net import						19,974

This leads to a domestic soybean meal consumption of: 

154,535

 + 

19,974

 = 

174,508 MT

France

**Calculation percentage FEFAC compliant soy**  
According to the French feed association EUROFAC, 1,602,000 tonnes of soy used by its members can be considered **FEFAC compliant**. In addition, other France actors (mainly retailers) acquired for 132,451 tonnes of RTRS certificates, together this corresponds to a percentage of **46%** (1,734,451 tonnes / 3,804,893 tonnes).  
  
**Calculation percentage conversion-free soy**  
Similar to last year’s report on 2018, Eurofac made a distinction between officially

benchmarked FEFAC compliant soy corresponding to 484,000 tonnes, which is mainly subdivided in RTRS (both food&feed companies; 144,451 tonnes), SSAP (217,401 tonnes) and Proterra soy and an additional 1,118,000 tonnes of soy including soybeans cultivated in France (342,824), 2BSvs certified soy, and soy traced to origin by import companies with sustainability policies in line with the FEFAC Soy Sourcing Guidelines. The RTRS, Proterra and soy from France can be considered **conversion-free**, which is **16%** of the total domestic soybean meal consumption.

Soybean meal available for the French livestock sector

In tonnes	Import	Domestic production	Export	Net available
Soybean meal	3,163,450		69,365	3,094,085
Soybeans x 0,8		342,824	108,304	715,173
Net availability	480,654			3,809,258

Source: Eurostat

Calculation of embedded soybean meal footprint

	Import			Export		
	Animal products (tonnes)	Soy conversion factor	Embedded soy (tonnes)	Animal products (tonnes)	Soy conversion factor	Embedded soy (tonnes)
Beef	254,875	0.29	73,914	199,339	0.29	57,808
Pork	271,384	0.44	119,409	479,209	0.458	219,478
Poultry	457,854	0.8217	376,219	361,604	0.675	244,083
Cheese	380,023	0.3574	135,820	680,184	0.267	181,609
Eggs	68,151	0.3935	26,817	40,324	0.326	13,145
Other dairy products	1,020,253	0.03574	36,464	2,130,487	0.0267	56,884
Total			768,643			773,008
Net export						4,365

This leads to a domestic soybean meal consumption of: 

3,809,258

 - 

4,365

 = 

3,804,893 MT



Germany

**Calculation percentage FEFAC compliant soy**  
The German Feed Association (DVT) reported that 1,511,982 of FEFAC compliant soy was acquired by its members. In addition, also other actors (food companies) acquired 107,584 RTRS certificates. This means that **46%** percent of the domestic soybean meal consumption was **FEFAC compliant** (1,619,566 tonnes / 3,546,292 tonnes).

**Calculation percentage conversion-free soy**  
Based on the RTRS credits (and mass balance) soy bought by German market players (both food&feed companies; 149,493 tonnes) and an estimation of the Proterra soy used in Germany (750,000 tonnes), the percentage of certified **conversion-free** free soy is **25%** (899,493 tonnes / 3,546,292 tonnes).

Soybean meal available for the German livestock sector

In tonnes	Import	Domestic production	Export	Net available
Soybean meal	2,325,811		1,654,27	671,538
Soybeans x 0,8	2,936,725	67,280	65,350	2,938,655
Net availability				3,610,193

Source: Eurostat

Calculation of embedded soybean meal footprint

	Import			Export		
	Animal products (tonnes)	Soy conversion factor	Embedded soy (tonnes)	Animal products (tonnes)	Soy conversion factor	Embedded soy (tonnes)
Beef	358,625	0.29	104,001	271,168	0.3	81,350
Pork	884,137	0.44	389,020	1,803,660	0.412	743,108
Poultry	720,590	0.8217	592,109	474,900	0.806	382,770
Cheese	869,510	0.3574	310,763	1,276,440	0.282	359,956
Eggs	398,741	0.3935	156,905	139,134	0.382	53,149
Other dairy products	3,593,790	0.03574	128,442	4,425,806	0.0282	124,808
Total			1,681,240			1,745,141
Net export						63,901

This leads to a domestic soybean meal consumption of: 

3,610,193

-

63,901

=

3,546,292 MT

Italy

**Calculation percentage FEFAC compliant soy**  
The Italian Feed Association Assalzoo reported that 1,165,973 tonnes of FEFAC compliant soy was acquired. This means that **25%** percent of the domestic soybean meal consumption was **FEFAC compliant** (1,165,973 tonnes / 4,579,213 tonnes).

**Calculation percentage conversion-free soy**  
Based on the volume of the Italian domestic soybean production (in meal) of 800,920 tonnes and the acquisition of RTRS certificates of feed companies (89,500 tonnes); the percentage of **conversion-free** soy is **19%** (890,420 tonnes / 4,579,213 tonnes).

Soybean meal available for the Italian livestock sector

In tonnes	Import	Domestic production	Export	Net available
Soybean meal	1,892,247		76,846	1,815,400
Soybeans x 0,8	1,638,525	800,920	15,981	2,423,464
Net availability				4,238,864

Source: Eurostat

Calculation of embedded soybean meal footprint

	Import			Export		
	Animal products (tonnes)	Soy conversion factor	Embedded soy (tonnes)	Animal products (tonnes)	Soy conversion factor	Embedded soy (tonnes)
Beef	385,470	0.29	111,786	117,884	0.29	34,186
Pork	952,984	0.44	419,313	83,984	0.578	48,543
Poultry	66,580	0.8217	54,709	167,363	0.978	163,681
Cheese	533,145	0.3574	190,546	455,626	0.543	247,405
Eggs	34,118	0.3935	13,426	19,868	0.497	9,875
Other dairy products	2,245,240	0.03574	80,245	478,570	0.0543	25,986
Total			870,024			529,676
Net import						340,349

This leads to a domestic soybean meal consumption of: 

4,238,864

+

340,349

=

4,579,213 MT



# The Netherlands

## Calculation percentage FEFAC compliant soy

The Netherlands is a large exporter of animal-based products yet has a relatively small volume of soybean meal available for own domestic consumption, namely 855,505 tonnes. According to feed association Nevedi, their members used 1,567,251 tonnes of soybeans in compound feed in 2019. The members also reported that 1,670,238 tonnes were FEFAC compliant. In addition, other downstream actors from the Netherlands acquired RTRS-certificates corresponding to 82,852 tonnes of soybean meal. That results in a more than **100%** use of **FEFAC compliant** soy.

## Calculation percentage conversion-free soy

Of the 1,670,238 tonnes of FEFAC compliant soybean meal used by the feed sector, 1,056,863 were covered by RTRS certificates, 191,437 by other conversion-free schemes (e.g. Proterra) and 421,938 by other FEFAC compliant standards. That means that more than **100%** of the soybean meal available for domestic consumption (855,505) was certified **conversion-free**.

Soybean meal available for the Dutch livestock sector

In tonnes	Import	Export	Net available
Soybean meal	2,662,323	3,177,937	-515,615
Soybeans x 0,8	3,291,724	748,318	2,543,406
Net availability			2,027,792

Source: Eurostat

Calculation of embedded soybean meal footprint

	Import			Export		
	Animal products (tonnes)	Soy conversion factor	Embedded soy (tonnes)	Animal products (tonnes)	Soy conversion factor	Embedded soy (tonnes)
Beef	421,484	0.29	122,230	488,093	0.3	146,428
Pork	249,152	0.44	109,627	1,022,992	0.354	362,139
Poultry	588,340	0.8217	483,439	1,583,015	0.755	1,195,176
Cheese	399,996	0.3574	142,958	920,416	0.35	322,146
Eggs	274,638	0.3935	108,070	440,470	0.263	115,844
Other dairy products	2,241,963	0.03574	80,128	2,139,091	0.036	77,007
Total			1,046,452			2,218,740
Net export						1,172,287

This leads to a domestic soybean meal consumption of:

2,027,792

–

1,172,287

=

855,505 MT





Norway

**Calculation percentage FEFAC compliant soy**  
Norway imported 44,077 tonnes of soybean meal and 323,061 of soybeans (converted to meal). It also exported quite some soybean meal (156,223 tonnes). This leads to a net availability of soybean meal equivalents of 210.891 tonnes. In addition to the import of soybeans and soybean meal, 385,082 tonnes of soy protein concentrates were acquired for the aquacultural sector. This was all Proterra certified and is registered under a different HS-code (2610).

Norway is a net importer of embedded soy for livestock based products. Looking only into the livestock products, 3,420 tonnes of embedded soybean meal equivalents were imported. However, Norway is also an important exporter of farmed-fish products. In 2019, Norway produced 1,443,000 tonnes of farmed fish of which 1,359,000 tonnes are exported. To produce the 1,443,000 tonnes of fish 385,082 tonnes of soy protein concentrates are used. The domestic consumption of farmed fish in Norway was 84,000 tonnes (1,443,000 – 1,359,000), this leads to a usage of 22,416 tonnes of soy protein concentrate for domestic consumption ((385,082/1,443,000)\*84.000). Since the unity of measurement in this report is soybean meal, we convert the soy protein concentrate to soybean meal, using the conversion factor 1.33 (voetnoot). This leads to a domestic consumption of (embedded) soybean meal for the consumption of farmed fish of 29.814 tonnes (1,33 \* 22.416 tonnes). We add this to the other embedded soy to come to the overall calculation of **domestic soybean meal consumption: 210.891 + 3,420 + 29,814 = 244,125**.

FEFAC’s Norwegian member reported the use of 554,833 tonnes of soybean meal of which 100% was considered to be FEFAC compliant. That means that more than **100%** (553,833/244,125) of the domestic soybean meal consumption is **FEFAC compliant**.

**Calculation percentage conversion-free soy**  
Norwegian food and feed companies acquired 35,566 tonnes of RTRS certificates. In addition, all soy protein concentrate used in aquaculture (385,082 tonnes of soy protein concentrates) was Proterra certified. This means that more than **100%** of the domestic soybean meal consumption is **conversion-free**.



Soybean meal available for the Norwegian livestock sector

In tonnes	Import	Export	Net available
Soybean meal	44,077	156,223	-112,146
Soybeans x 0,8	323,061	24	323,037
Net availability			210,891

Source: Eurostat

Calculation of embedded soybean meal footprint

	Import			Export		
	Animal products (tonnes)	Soy conversion factor	Embedded soy (tonnes)	Animal products (tonnes)	Soy conversion factor	Embedded soy (tonnes)
Beef	10,415	0.29	3,020	60	0.29	17
Pork	994	0.44	437	3,665	0.44	1,613
Poultry	1,030	0.8217	847	1,166	0.8217	958
Cheese	16,304	0.3574	5,827	10,381	0.3574	3,710
Eggs	796	0.3935	313	361	0.3935	142
Other dairy products	8,294	0.03574	296	24,660	0.03574	881
Total			10,741			7,321
Net import						3,420

This leads to a domestic soybean meal consumption of: **210,891 + 3,420 + 29,814\* = 244,125 MT**

\*Domestic consumption of (embedded) soybean meal for the consumption of farmed fish



Poland

Calculation percentage FEFAC compliant soy  
No information available on FEFAC compliant soy.

Calculation percentage conversion-free soy  
No information available on FEFAC compliant soy.

Soybean meal available for the Polish livestock sector

In tonnes	Import	Domestic production	Export	Net available
Soybean meal	2,619,486		95,258	2,524,227
Soybeans x 0,8	69,961	12,288	24,437	57,813
Net availability				2,582,040

Source: Eurostat

Calculation of embedded soybean meal footprint

	Import			Export		
	Animal products (tonnes)	Soy conversion factor	Embedded soy (tonnes)	Animal products (tonnes)	Soy conversion factor	Embedded soy (tonnes)
Beef	24,381	0.29	7,071	382,145	0.29	110,822
Pork	660,253	0.44	290,511	448,008	0.44	197,123
Poultry	88,905	0.8217	73,053	1,460,851	0.8217	1,200,381
Cheese	104,366	0.3574	37,301	258,529	0.3574	92,398
Eggs	10,701	0.3935	4,211	222,430	0.3935	87,526
Other dairy products	493,349	0.03574	17,632	1,367,223	0.03574	48,865
Total			429,779			1,737,116
Net export						1,307,336

This leads to a domestic soybean meal consumption of: 2,582,040 – 1,307,336 = 1,274,704 MT

Portugal

Calculation percentage FEFAC compliant soy  
According to the Portuguese animal feed association IACA (*Associação Portuguesa dos Industriais de Alimentos Compostos para Animais*), 200,000 tonnes of the soybean meal used by its members were FEFAC compliant (ProTerra and other non-GM standards). This means that 19% percent of the domestic soybean meal consumption was FEFAC compliant (200,000 / 1,067,457).

Calculation percentage conversion-free soy  
ProTerra soy is considered to be conversion-free and the other non-GMO soy (e.g. Donau Soja/ Europe Soy) is considered to be conversion-free as well. Consequently, this means that also 19% of the domestic soybean meal consumption was certified conversion-free.

Soybean meal available for the Portugese livestock sector

In tonnes	Import	Export	Net available
Soybean meal	113,320	52,089	61,231
Soybeans x 0,8	910,145	5,433	904,712
Net availability			965,943

Source: Eurostat

Calculation of embedded soybean meal footprint

	Import			Export		
	Animal products (tonnes)	Soy conversion factor	Embedded soy (tonnes)	Animal products (tonnes)	Soy conversion factor	Embedded soy (tonnes)
Beef	120,992	0.29	35,088	14,160	0.29	4,106
Pork	100,957	0.44	44,421	34,194	0.571	19,524
Poultry	73,442	0.8217	60,347	27,061	0.882	23,868
Cheese	62,385	0.3574	22,296	8,912	0.543	4,839
Eggs	11,350	0.3935	4,466	24,972	0.371	9,265
Other dairy products	244,920	0.03574	8,753	225,703	0.0543	12,256
Total			175,372			73,858
Net import						101,513

This leads to a domestic soybean meal consumption of: 965,943 + 101,513 = 1,067,457 MT



Spain

**Calculation percentage FEFAC compliant soy**  
The Spanish feed association reported the use of 4,523,411 tonnes of soy in the compound feed industry, of which more than 1 million tonnes of soybean meal equivalents are SSAP compliant. In addition, Spanish food companies acquired for 30,000 tonnes RTRS certificates or mass balance soy. No specific information is available on soy imported under other FEFAC compliant schemes. With a total domestic soybean meal consumption of 4.114.092 tonnes, this means that **25%** was **FEFAC compliant** (1,030,000 tonnes / 4,114,092 tonnes).

**Calculation percentage conversion-free soy**  
All RTRS soy can be considered **conversion-free**. Hence **1%** (30,000 / 4,114,092) can be considered as certified deforestation-free in 2019. It should be noted that according to CESFAC the percentages of FEFAC compliant and conversion-free soy are significantly higher than stated below.

Soybean meal available for the Spanish livestock sector

In tonnes	Import	Domestic production	Export	Net available
Soybean meal	2,820,947		316,088	2,504,859
Soybeans x 0,8	2,660,410	4,040	11,007	2,653,443
Net availability				5,158,302

Source: Eurostat

Calculation of embedded soybean meal footprint

	Import			Export		
	Animal products (tonnes)	Soy conversion factor	Embedded soy (tonnes)	Animal products (tonnes)	Soy conversion factor	Embedded soy (tonnes)
Beef	124,981	0.29	36,245	194,892	0.29	56,519
Pork	103,402	0.44	45,497	1,719,425	0.571	981,792
Poultry	150,683	0.8217	123,816	241,334	0.882	212,857
Cheese	307,225	0.3574	109,802	114,104	0.543	61,958
Eggs	20,534	0.3935	8,080	122,372	0.371	45,400
Other dairy products	499,873	0.03574	17,865	497,049	0.0543	26,990
Total			341,305			1,385,515
Net export						1,044,210

This leads to a domestic soybean meal consumption of: **5,158,302** – **1,044,210** = **4,114,092 MT**

Sweden

**Calculation percentage FEFAC compliant soy**  
The Swedish domestic soybean meal consumption is calculated as 330,205 tonnes in 2019. According to the Swedish feed association, their members used 243,000 tonnes of soybean meal. Of this volume, 243,000 was FEFAC compliant. The 243,000 contains 172,000 tonnes ProTerra soy, 18,000 tonnes RTRS compliant soy from Candada and 53,000 tonnes organic soy. In addition, downstream actors in the supply chain acquired for 70,557 tonnes of RTRS certificates to cover their embedded soy. That means that 313,557 / 330,205 = **95%** is **FEFAC compliant**.

**Calculation percentage conversion-free soy**  
RTRS soy and ProTerra soy is considered to be conversion-free and hence 260,557 (172,000 + 18,000 + 70,557) of 330,205 = **79%** is considered **conversion-free**.

Soybean meal available for the Swedish livestock sector

In tonnes	Import	Export	Net available
Soybean meal	225,468	0	225,468
Soybeans x 0,8	22,208	76	22,133
Net availability			247,601

Source: Eurostat

Calculation of embedded soybean meal footprint

	Import			Export		
	Animal products (tonnes)	Soy conversion factor	Embedded soy (tonnes)	Animal products (tonnes)	Soy conversion factor	Embedded soy (tonnes)
Beef	76,209	0.29	22,101	6,968	0.29	2,021
Pork	64,493	0.44	28,377	18,323	0.232	4,251
Poultry	57,630	0.8217	47,354	84,499	0.619	52,305
Cheese	135,239	0.3574	48,334	19,431	0.259	5,033
Eggs	4,371	0.3935	1,720	15,146	0.337	5,104
Other dairy products	211,633	0.03574	7,564	159,570	0.0259	4,133
Total			155,450			72,846
Net import						82,604

This leads to a domestic soybean meal consumption of: **247,601** + **82,604** = **330,205 MT**



# United Kingdom

## Calculation percentage FEFAC compliant soy

The domestic soybean meal consumption for the United Kingdom was calculated as 2,807,564 tonnes of soybean meal in 2019. According to AIC, the UK Feed Association, 947,000 officially benchmarked FEFAC compliant soy and in addition, 375,187 tonnes of soy was also considered to be FEFAC compliant. Finally, various food companies bought RTRS credits (395,694) This means that **61%** of the domestic soybean meal consumption was **FEFAC compliant** (1,717,881 tonnes / 2,807,564)

## Calculation percentage conversion-free soy

Consultancy firm EFECA gathered confidential data from UK soy buyers on the extent to which soy was covered by conversion-free standards for the UK Round Table on Sustainable Soya. Calculations by EFECA show that 32% of soy imported to the UK (3.5 million tonnes according to the report) in 2019 was covered by a deforestation and conversion-free standard (1.12 million tonnes). The EFECA report showed that RTRS was the most commonly used scheme, representing 16% of the soy directly consumed in the UK, followed the trader's owned standards (15%) like Cargill Triple S, Cefetra Responsible Soy (CRS) and ADM Responsible Soybean Standard, followed by Proterra (1%). If we take the 1.12 million tonnes of conversion-free soy and calculate it as a percentage of the (in this report) calculated soybean meal consumption (1.12 / 2.807), we arrive at a percentage of **40% conversion-free** soy.

It must be noted that the conversion factor from beans to meal used in this report is 0.8. The EFECA report is based on a conversion factor from beans to meal of 0.725, which results in a different import figure for soybean meal equivalents in both reports.



Soybean meal available for the UK livestock sector

In tonnes	Import	Export	Net available
Soybean meal	2,115,341	70,766	2,044,575
Soybeans x 0,8	514,157	18,438	495,719
Net availability			2,540,294

Source: Eurostat

Calculation of embedded soybean meal footprint

	Import			Export		
	Animal products (tonnes)	Soy conversion factor	Embedded soy (tonnes)	Animal products (tonnes)	Soy conversion factor	Embedded soy (tonnes)
Beef	239,020	0.29	69,316	135,405	0.29	39,267
Pork	420,041	0.44	184,818	243,078	0.335	81,431
Poultry	434,178	0.8217	356,764	383,174	0.874	334,894
Cheese	524,458	0.3574	187,441	205,502	0.263	54,047
Eggs	23,311	0.3935	9,173	73,965	0.361	26,701
Other dairy products	804,247	0.03574	28,744	1,241,260	0.0263	32,645
Total	836,256			568,986		
Net import				267,270		

This leads to a domestic soybean meal consumption of:

2,540,294

+

267,270

=

2,807,564 MT





# Endnotes

- 1 [FAO; FAO Stat, www.fao.org/faostat/en/#data/TP](http://www.fao.org/faostat/en/#data/TP)
- 2 [www.ussoy.org/recapping-the-2019-u-s-soybean-crop-results](http://www.ussoy.org/recapping-the-2019-u-s-soybean-crop-results)
- 3 [www.feednavigator.com/Article/2019/07/02/USDA-sees-record-soybean-harvest-for-Brazil](http://www.feednavigator.com/Article/2019/07/02/USDA-sees-record-soybean-harvest-for-Brazil)
- 4 [www.reuters.com/article/us-china-grain-output-idUSKBN1YA0BH](http://www.reuters.com/article/us-china-grain-output-idUSKBN1YA0BH)
- 5 [www.europarl.europa.eu/doceo/document/A-8-2018-0121\\_EN.pdf](http://www.europarl.europa.eu/doceo/document/A-8-2018-0121_EN.pdf)
- 6 See for instance SourceUp, [www.sourceup.org](http://www.sourceup.org)

## Resources

European Soy Monitor 2017  
[www.idhsustainabletrade.com/publication/european-soy-monitor](http://www.idhsustainabletrade.com/publication/european-soy-monitor)

European Soy Monitor 2018  
[www.idhsustainabletrade.com/publication/european-soy-monitor-2018](http://www.idhsustainabletrade.com/publication/european-soy-monitor-2018)

UK Roundtable on Sustainable Soya: Annual progress report, 2020  
[www.efeca.com/wp-content/uploads/2020/10/UK-RT-on-Sustainable-Soya-APR-19\\_20-final.pdf](http://www.efeca.com/wp-content/uploads/2020/10/UK-RT-on-Sustainable-Soya-APR-19_20-final.pdf)

The Urgency of Action to Tackle Tropical Deforestation  
[www.idhsustainabletrade.com/uploaded/2020/02/IDH\\_The-UoA-to-Tackle-Tropical-Deforestation\\_2020-web.pdf](http://www.idhsustainabletrade.com/uploaded/2020/02/IDH_The-UoA-to-Tackle-Tropical-Deforestation_2020-web.pdf)