



WWF

REPORT

INT

2014



Soy Report Card

Assessing the use of responsible soy for animal feed in Europe

Sustainability | Conservation | Biodiversity

CONTENTS

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SUMMARY

The WWF Soy Report Card 2014

shows that using responsible soy is possible now, and some forerunning companies are leading the way. WWF urges all companies to take action immediately to ensure the soy they use has not contributed to destruction of forests, grasslands or savannahs.



THE MAJORITY OF COMPANIES ARE LAGGING BEHIND IN COMMITMENTS — AND EVEN MORE IN CONCRETE ACTIONS

In this Report Card, WWF holds up a mirror to 88 of Europe's major retailers, food service companies, consumer goods manufacturers and dairy, meat, egg and feed companies. It looks at how these companies source soy for animal feed or animal products, so they can see how well they are addressing one of the world's most serious environmental challenges: the irresponsible production of soy.

The picture is disappointing. Some frontrunner companies have made strong commitments to stop sourcing irresponsible soy from recently cleared forests, savannahs and grasslands. They have also started buying "better soy" from producers who adhere to robust responsible production guidelines.

The majority, however, are lagging behind in commitments – and even more in concrete actions such as buying responsible soy. This leaves producers with little incentive to certify their soy as responsible and risks the integrity of some of the world's most valuable ecosystems, like the Amazon, Cerrado and Chaco.

There is still time for companies to take action and support responsible soy. But they need to act now to prevent further loss of rich and diverse landscapes that are vital to the health of the planet, people, and species like the jaguar, maned wolf and anteater.

What's the problem with soy?

Mainly used in feed for animals in the meat and dairy supply chains, soy is the fastest expanding crop in the world. Its growth has come at great environmental and social cost. Ever since soy production began increasing in South America in the 1960s, soy has been associated with clearance of some of the world's most crucial ecosystems, such as the Amazon and Cerrado, leading to loss of biodiversity. This loss of valuable forests and other native vegetation means that the carbon storage services they provide are lost forever, contributing to global climate change. Soy production is also linked with unsafe and excessive use of pesticides, violation of land rights and unfair labour conditions.

NGOs and companies involved in the soy supply chain have tried to tackle these problems by establishing sustainability schemes the Round Table on Responsible Soy (RTRS) and ProTerra, which set standards for responsible soy production and aim to



**THE READY
AVAILABILITY OF A
VARIETY OF SUPPLY
CHAIN OPTIONS
MEANS THERE IS
NO EXCUSE FOR
COMPANIES NOT TO
BEGIN SOURCING AND
USING RESPONSIBLE
SOY NOW**

transform the soy industry to more responsible practices. Companies that actively commit to these schemes support responsible soy production and no longer contribute to habitat loss, while also benefiting from decreased reputational risk, enhanced social licence to operate, market differentiation and other advantages.

WWF has strongly supported the RTRS since its inception in 2006. Its standard requires members not to clear native forest or any land that is important for wildlife and people; adhere to Better Management Practices (BMPs); and treat communities and workers fairly. Progressive producers from South and North America, India and China have worked hard to become certified. The first RTRS-certified soy arrived on the market in 2011 and certified volumes are steadily increasing. Unfortunately, only just over half of certified soy has been sold to date. Buyers are not purchasing enough RTRS soy, so producers don't have the incentive to improve practices and become certified.

For several years, WWF has been asking companies that use soy, such as those in the retail, meat and animal feed sectors, to join the RTRS. WWF has pressed companies to put publicly available policies and timebound plans in place to reach 100 per cent RTRS-certified soy by 2015, and to start buying or specifying increasing amounts of certified soy.

What does the Report Card reveal?

PLEASE NOTE:

For the sake of simplicity, WWF has used the term "use" throughout the Report Card to represent how companies can and do support responsible soy through any of the supply chain options available through the RTRS and ProTerra. WWF notes that companies using the RTRS credit trading system are not, technically, "using" responsible soy, but rather purchasing credits to support responsible soy production.

Assessing 88 companies from Denmark, France, the Netherlands, Sweden and the UK on their direct or indirect use of soy for animal feed, this Report Card is a first step toward understanding the industry's commitment to and use of responsible soy. WWF looks at the companies' commitments, plans and concrete actions to find out who is living up to their responsibility to make sure the soy they use does not harm the environment or people. This publication is the first in a series, and WWF intends to enlarge its scope to encompass more countries, companies and product lines (such as soy oil) in future editions.

While there are encouraging signs, the overall results are disappointing. A group of forward-thinking companies – 31 per cent of the companies surveyed – have made full or partial commitments to use only responsible soy. Some of these commitments have been followed up with tangible actions. But only a few companies are on track to be using 100 per cent responsible soy by 2015, and just 42 per cent of companies in the Report Card have started buying it. Companies as a whole have a long journey ahead of them before responsible soy becomes the norm.

Of the companies that have made commitments, more than half have done so as part of a national initiative. Others have made their own individual corporate commitments. Another group has made commitments to "deforestation-free" supply chains as a result of the Consumer Goods Forum's deforestation resolution. Some companies have signed up to the Soy Moratorium, which has been instrumental in stopping trade in soy grown in recently deforested areas of the Brazilian Amazon. Commitments are an important first step, but they are not enough. WWF wants to see companies develop clear policies on responsible procurement of soy, make action plans with timebound targets to

ensure they are using 100 per cent responsible soy by 2015, and take concrete actions immediately to fulfil these plans.

The ready availability of a variety of supply chain options means there is no excuse for companies not to begin sourcing and using responsible soy now. This includes covering part or all of their use through RTRS credits. This is crucial not only because it will get companies on the road to 100 per cent responsible soy in the longer term, but also because it sends a potent signal to soy producers that there is a growing market for responsible soy, thus driving more producers to commit to certification schemes.

Nevertheless, WWF is pleased that several companies are taking a leadership role and are on track toward fulfilling 2015 goals. These companies include **Arla** (Denmark); **Ahold** and **FrieslandCampina** (Netherlands); **HKScan Sweden**, **ICA Sweden** and **Lantmännen** (Sweden); and **Marks & Spencer** and **Waitrose** (UK).

WHAT IS RESPONSIBLE SOY?

WWF defines “responsible soy” as soy certified according to the RTRS. For companies that choose non-genetically modified (non-GM) soy, WWF recommends RTRS non-GM and ProTerra.

According to WWF analyses, the RTRS and ProTerra multi-stakeholder initiatives have robust environmental and social criteria and third party auditing systems as well as other attributes that define credible certification schemes. As with all standards for better production that it supports, WWF asks both schemes to continuously improve. WWF actively supports the RTRS on this journey, and also asks ProTerra to strengthen its governance, transparency and the level of assurance it offers buyers.










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Soy is used to feed livestock such as pigs



HEADLINE FINDINGS

-  Too many companies still have not even taken the basic first step of joining a credible certification scheme in order to begin the process of sourcing responsible soy. Only 31 out of 88 of the assessed companies are members of the RTRS.
-  14 of the companies have made individual commitments to use 100 per cent responsible soy for the full scope of their operations by 2015 or sooner, and an additional 13 have made similar commitments for partial (often national) scope.
-  27 per cent of the companies that submitted answers have not made commitments on responsible soy or “no deforestation”, while 32 companies did not respond to WWF’s questionnaire.
-  Just 42 per cent of companies in the Report Card have started buying responsible soy, amounting to roughly 850,000 tonnes.
-  Six companies have already bought 50 per cent or more responsible soy, so are right on track to meet their 2015 commitments.
-  National commitments in the Netherlands, Sweden and Switzerland have made a big difference in raising awareness, creating commitment and spurring action among even non-branded companies.
-  More companies need to make individual corporate commitments for the full scope of their global operations.



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A soy field in the Cerrado, a vital ecosystem under severe threat from soy expansion

SOY: AN INTRODUCTION

Soy has expanded more than any other crop on Earth over the past few decades, mainly for use in animal feed. This has had a devastating impact on crucial ecosystems. With

demand set to continue increasing, we need to take action now.

Soy and its uses

Most of the world's soy is produced to feed the animals we eat – and demand is growing.

**THREE-QUARTERS
OF TOTAL SOY GOES
INTO PRODUCING
ANIMAL FEED FOR
LIVESTOCK**

For thousands of years, soybeans have been grown in Asia. Since their early cultivation, the number of ways soy is used has increased. Today, only around 6 per cent of soybeans are eaten directly as whole beans or in products like tofu and soy sauce. Soy oil is also used as an ingredient in many baked and fried products, such as margarine, and in other consumer goods, like soap and cosmetics. Soy derivatives, such as the emulsifier lecithin, are a key ingredient in many processed foods, from chocolate to ice cream. Another small – but increasing – proportion of the world's soy is used to create oil for biodiesel.

However, the vast majority of soy – around three-quarters of total soy volumes – goes into producing protein-rich animal feed for livestock, especially poultry and pigs. Soy is one of the world's most popular animal feed ingredients because it produces more protein per hectare (ha) than any other major crop, is one of the most profitable crops and can adapt to many different climatic conditions.

With rising global populations and incomes, demand for animal products such as meat, dairy and eggs has skyrocketed over the past few decades. Between 1967 and 2007 pork production rose by 294 per cent, egg production by 353 per cent and poultry by 711 per cent.

As a result, demand for soy-based feed has soared too – at the expense of some of the world's most vital forests, grasslands and savannahs being cleared for soy fields.

Figure 1

AVERAGE GRAMS OF SOY USED PER KILO OF PRODUCTS*



Source: Hoste and Bolhuis, 2010

*In the Netherlands

The growth of soy and associated issues



SOY FIELDS NOW COVER MORE THAN 1 MILLION SQUARE KILOMETRES OF THE WORLD

Soy has expanded more than any other crop in the world in recent times, with costly consequences for the environment.

In just 50 years, global soy production has grown tenfold, from 27 to 269 million tonnes. Cost-effective, soy-based animal feed has been instrumental in allowing the farming industry to produce meat and dairy for declining costs, as well as in bringing economic benefits and addressing food security. However, it has also had irreversible negative impacts on valuable natural ecosystems, and workers and communities.

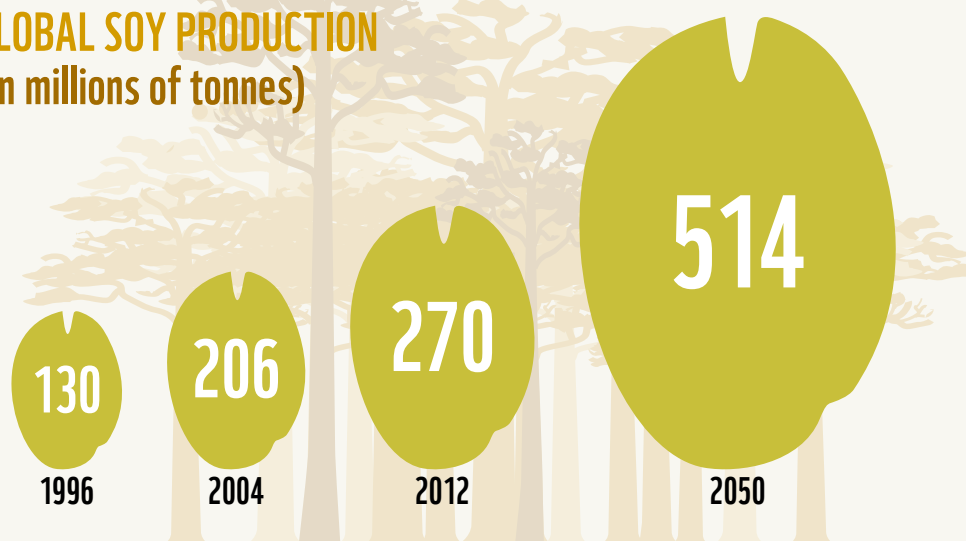
Millions of hectares of forest, grassland and savannah have been converted to agriculture, either directly or indirectly, as a result of the global boom in soy production. Much of this has been in environmentally vital areas of South America, where soy production grew by 123 per cent between 1996 and 2004 – the fastest rate anywhere in the world. In total, the area of South America devoted to soy grew from 17 million ha in 1990 to 46 million in 2010. Other key soy producers include China, India and the United States. The main importers are the EU and China, while the US, Brazil and Argentina have the greatest soy consumption per capita.

Soy fields now cover more than 1 million square kilometres of the world – the total combined area of France, Germany, Belgium and the Netherlands.

Approximately 80 per cent of the world's soy is genetically modified (GM). Negative environmental and social impacts are associated with both GM and non-GM production.

Figure 2

GLOBAL SOY PRODUCTION (in millions of tonnes)



Source: Bruinsma, 2009; USDA-FAS, 2013; FAO, 2007

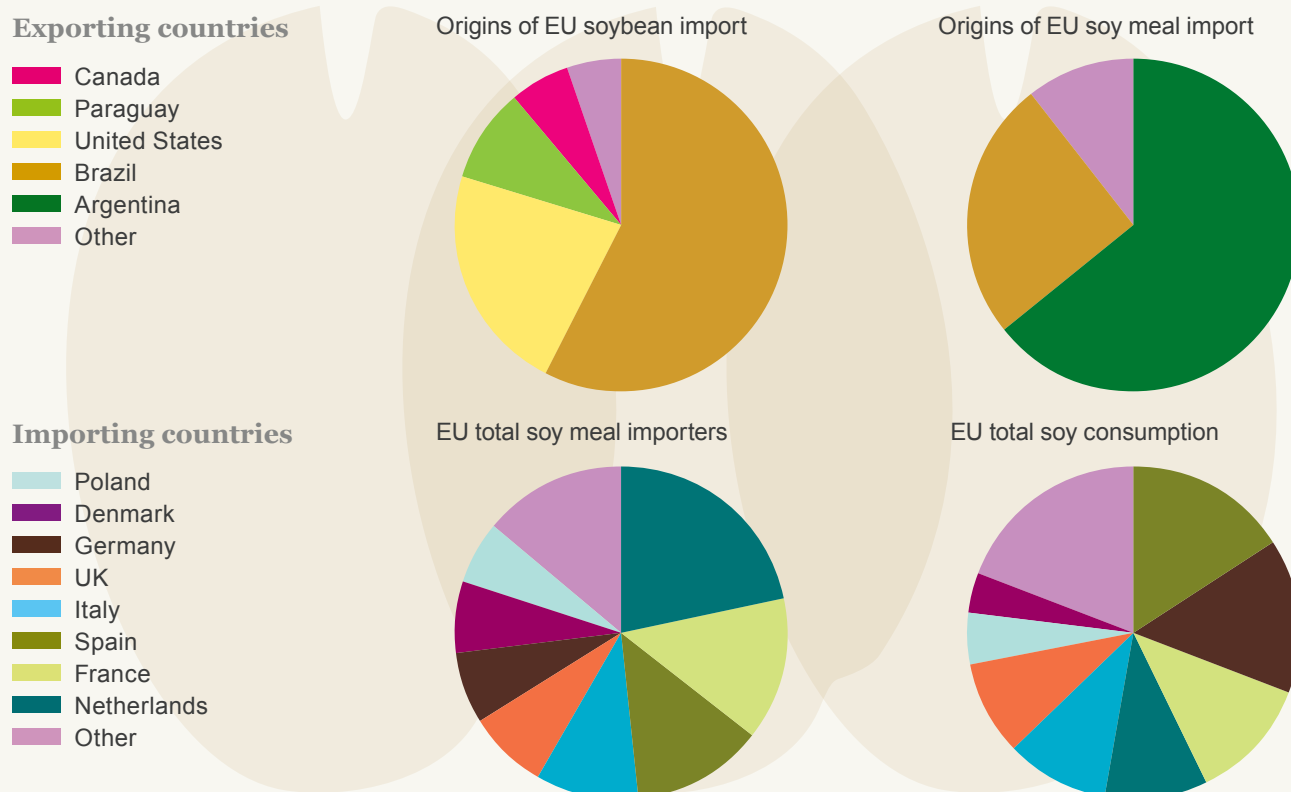
Figure 3



Source: Agralytica, 2012; FAOSTAT, 2013; Bruinsma, 2009

Figure 4

EU SOY IMPORTS AVERAGES FOR 2006-10



Source: ISTA Mielke, Germany, oilworld.de

Soy's impact on nature and people

When soy is irresponsibly produced, its impacts go beyond the loss of forests, grasslands and savannahs.

Forest loss is a key factor in climate change, accounting for up to 20 per cent of global greenhouse gas (GHG) emissions. Furthermore, as ecosystems are destroyed or degraded, we lose many of the ecological services we rely on, from clean water and healthy soils to pollination and pest control. It destroys biodiversity too, putting huge numbers of species and plants into decline. According to WWF's 2012 *Living Planet Report*, species populations in tropical regions have fallen by an average of 60 per cent since 1970.

Clearing forests and other ecosystems also has a social impact. The forests of South America are home to many indigenous communities, providing them with food, shelter, fuel, medicines and livelihoods. Soy has been implicated in the eviction and displacement of indigenous communities in Argentina and Paraguay.

Modern farming technology also requires the use of fertilizers, pesticides and herbicides. Excessive use of agrochemicals is one of the main environmental threats linked to soy production, causing contamination as well as huge impacts on water quality and biodiversity.

Some of the globally important ecosystems under severe threat from soy are shown on the map on the next page.



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Deforestation in the Cerrado to make way for soy fields

Figure 5

LANDSCAPES AT RISK FROM SOY EXPANSION

NATURAL ECOSYSTEMS AFFECTED BY SOY



Forests: are areas spanning more than 0.5ha, with trees at least 5m high and a canopy cover of at least 10 per cent (FAO definition). Forests at risk of soy expansion include the Amazon, the Atlantic Forest and the Chiquitano Dry Forest.



Savannahs: are grassland areas that include a significant number of trees and woody plants, but not so densely spaced as to form a canopy. Much of the Cerrado and the Gran Chaco fall under this category, though both also contain forest areas.



Grasslands: are dominated by grasses and other herbaceous plants. Examples include the North American prairies, the Argentinian Pampas and the Campos in Uruguay.

IT'S NOT ONLY ABOUT FORESTS — GRASSLANDS AND SAVANNAHS CAN ALSO BE NEGATIVELY IMPACTED BY IRRESPONSIBLE SOY PRODUCTION

THE AMAZON

is home to one in every 10 animals on Earth, and plays a vital role in regulating the global climate. Soy has contributed to deforestation in the Brazilian and Bolivian Amazon, both through direct conversion and by displacing cattle production to the forest frontier.

THE CHIQUITANO FOREST

is the world's largest tropical dry forest and one of the most endangered ecosystems on the planet. Soy production is expanding rapidly in Bolivia, accompanied by high rates of forest clearance.

THE GRAN CHACO

is a hot dry plain with a range of habitats from dry thorn forests to palm savannahs. High in biodiversity, its central location in South America makes it an important refuge for migrating birds. Agricultural expansion, largely driven by soy, is the biggest threat to its natural ecosystems.

THE CERRADO

holds around 5 per cent of the world's biodiversity and is one of South America's most important water sources. But since the late 1950s, around half of the Brazilian Cerrado has been converted mostly to agriculture and pastures.



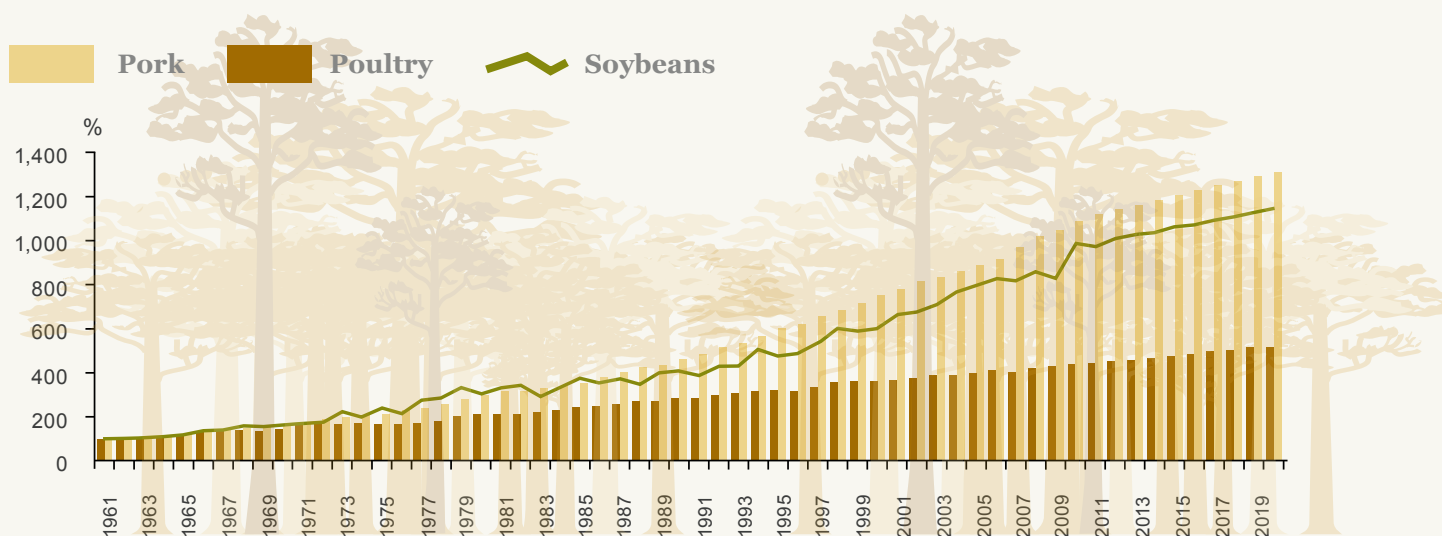
Demand for soy will continue to rise

Already the destruction of key ecosystems due to soy has reached critical and in many cases irreversible levels, threatening species, people's livelihoods and quality of life and driving climate change. But the situation is not static. The world's population will continue to grow. People will continue to get richer, and want more meat and dairy. **As a result soy production will almost double by 2050, according to the Food and Agriculture Organization of the United Nations (FAO).**

More natural ecosystems will be lost and more devastation wrought – unless we take urgent action.

Figure 6

CURRENT AND PROJECTED DEVELOPMENT OF SOYBEAN AND MEAT PRODUCTION: 1961-2020

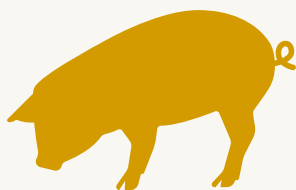


Source: KMPG, 2013

The negative impacts of soy can be avoided

One thing is clear: with demand set to soar, more and more soy is going to be grown. But expansion doesn't have to happen in crucial ecosystems nor at the expense of vulnerable communities.

There are alternatives which allow us to meet the world's increasing demand for soy in a way that does not convert valuable landscapes, while also promoting responsible use of agrochemicals, good and fair community relations and labour conditions, and safeguarding land rights.



EVERYBODY HAS A ROLE TO PLAY IN IMPLEMENTING SOLUTIONS

Everybody has a role to play in implementing solutions, from companies that produce, buy and finance soy to consumers of soy and meat products. All of us have the power to make choices that will help build a more responsible soy industry.

For companies buying soy directly, or indirectly through animal products, WWF believes the most effective way to contribute to minimizing environmental damage is to start sourcing responsible soy. One crucial first step is to join the Round Table on Responsible Soy (RTRS), adhere to its standards, and commit to 100 per cent RTRS-certified soy for global operations under a timebound plan. For markets that favour non-GM soy, companies can choose non-GM RTRS or ProTerra soy. Other strategies companies should consider include reducing waste, promoting healthy diets with less animal protein and exploring alternative responsible protein sources.

For more information on the RTRS, go to [page 45](#).

Certified responsible soy: supply and demand

The first RTRS-certified soy came on the market in June 2011. To date, 2.5 million tonnes of soy have been certified, predominantly from Brazil (269,833ha) and Argentina (151,264ha). In South America, Paraguay has the third largest certified area with 19,316ha. Outside South America RTRS certification is spreading slowly — 30,008ha have achieved certification in India, and the first soy operations have been certified in the United States (3,075ha) and China (20,103ha).

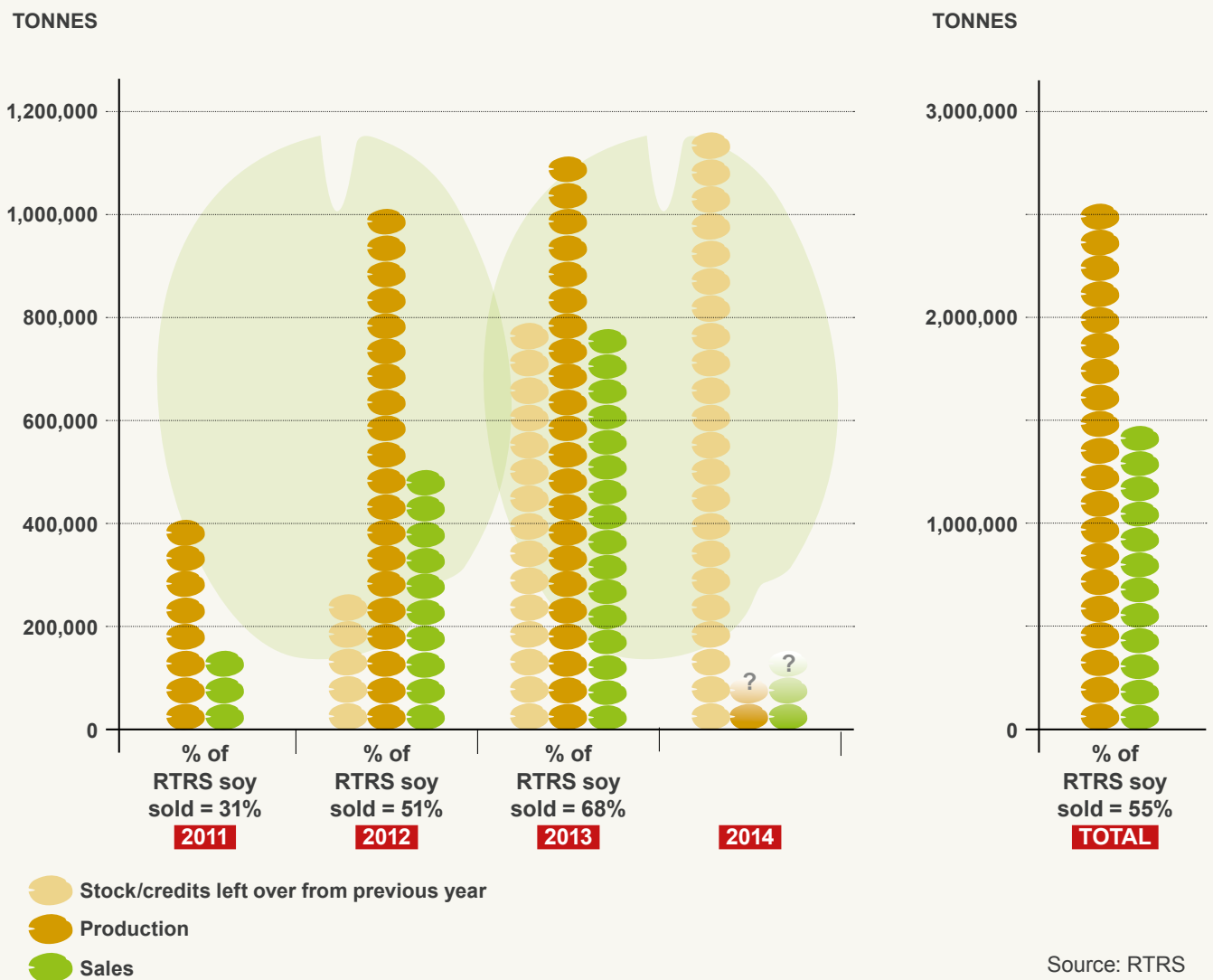
However, only 1.4 million tonnes (55 per cent) of RTRS-certified soy has been sold, mostly as credits through the RTRS certificate trading system. Over 1 million tonnes of RTRS-certified soy produced over the past few years is still available on the market, while upcoming harvests will soon be certified and more producers are joining the scheme.

WWF urges all companies that use soy products to purchase RTRS soy now, not only because it is the best way to mitigate the risk of using irresponsibly-produced soy, but also because producers need to be incentivized to join or stay with the RTRS. Lack of market uptake risks alienating producers from certifying the rest of their farms or from joining the RTRS programme and starting their journey to improve soy production practices.

Volumes for ProTerra-certified soy have been relatively stable during recent years, ranging between 3.4 (2012) and 4.2 (2011) million tonnes per year. Sales data is not public, but according to ProTerra most of its certified soy has been sold.

Figure 7

SUPPLY AND DEMAND OF RTRS SOY



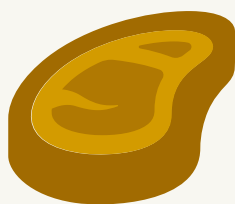
What else is WWF doing to curb the negative impacts of soy?

While certification is a vital tool for market players in making soy production more responsible, complementary strategies are needed. WWF is working with diverse groups, from national governments to banks investing in soy, on many other initiatives all aimed at making soy production more responsible.

WWF supports the following strategies:

Influencing producer country legislation and encouraging land use

planning: In several countries WWF is encouraging governments to introduce and implement policies to conserve forests and native vegetation, which have the potential



REDUCING WASTE AND EATING FEWER ANIMAL PRODUCTS COULD HELP KEEP SOY DEMAND IN CHECK

to halt the irresponsible expansion of soy and other agricultural production. WWF promotes transparent, systematic planning processes for balancing different land uses with conservation of natural environments.

In Brazil, for example, WWF and other civil society organizations have been working with the government and the private sector on Systematic Conservation Planning – a science-based approach that looks at land use within the context of the whole biome.

Promoting Better Management Practices: BMPs can help farmers improve soil health and productivity, reduce the use of inputs such as agrochemicals and water, and mitigate negative environmental impacts. One recent example is a project in Sorriso, Mato Grosso, where WWF-Brazil is working with female soy farmers to improve their production practices. WWF is also promoting expansion of soy production in Brazil on low productivity pastures.

In the United States, WWF and other NGOs are members of Field to Market – the Alliance for Sustainable Agriculture, which brings together grower groups, retailers and other supply chain businesses, and along with civil society promotes continuous improvement using an outcomes-based approach.

Promoting consumer country initiatives: WWF is influencing stakeholders to make national commitments and set deadlines to use 100 per cent responsible soy, resulting in initiatives in the Netherlands, Sweden and Switzerland (see [pages 49 and 50](#)).

Developing Payments for Ecosystem Services (PES) schemes: Converting forests or savannahs to soy is usually more profitable in the short term than conserving them. PES schemes can help to balance this by rewarding those who conserve natural ecosystems and the services they provide. WWF has helped develop a new PES law in Paraguay. In Brazil, WWF is exploring encouraging landowners who conserve more than the legal minimum landscape to sell or lease their natural vegetation to those not in compliance.

Encouraging responsible investment: Financial markets can help to shape the future of the soy industry by diverting capital away from projects that threaten natural ecosystems toward responsible production. WWF recently produced a sustainable investment guide, *The 2050 Criteria*, outlining environmental and social risks and opportunities around soy, and key performance indicators for assessing them. The information in this publication is helping financial institutions play a proactive role in creating a more responsible soy industry.

Reducing consumption and cutting waste: Reducing waste and eating fewer animal products in countries with high intake of animal protein could help keep soy demand in check. Opportunities exist to reduce waste at every step of the soy supply chain, from farm to consumer – and WWF is working hard to raise awareness.

Responsible substitution: Some WWF offices are exploring responsible alternative protein sources, such as other legumes or locally-produced European soy.



THE GROWTH OF SOY: IMPACTS AND SOLUTIONS REPORT

Find more information on the growth of soy, its impact on nature and what we can do about it in WWF's *The Growth of Soy* report at www.panda.org/growthofsoyreport

Figure 8

SOY AND CONSUMERS

How soy and animal products affect vital ecosystems



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Soy is embedded in most of the meat we eat

HOW COMPANIES WERE ASSESSED

The Soy Report Card 2014 assesses 88 European companies' commitments, plans and actions on responsible soy.

Scope



**THE SOY REPORT
CARD 2014
MEASURES TO
WHAT EXTENT 88
COMPANIES ARE
USING RESPONSIBLE
SOY IN ANIMAL
FEED AND DERIVED
PRODUCTS**

The *Soy Report Card 2014* measures to what extent 88 major animal feed, meat, dairy, egg, retail, professional food service and consumer goods companies are using responsible soy in animal feed and derived animal products. The companies are based in Denmark, France, the Netherlands, Sweden and the UK. These countries account for a third of soy use in Europe, and 5 per cent of global soy use. Additionally, a large number of the assessed companies have operations outside their home countries. Some of these companies buy soy directly to make animal feed, others buy and sell products in which soy is already embedded (such as meat, eggs and dairy).

The Report Card focuses on these countries because Europe is currently the prime market for responsible soy and strong demand there is expected to influence other markets.

WWF-Switzerland did not send the Report Card questionnaire to companies in Switzerland, but rather provided information on the country's progress toward a national commitment, which companies signed individually, pledging to use 90 per cent responsible segregated non-GM soy in 2014 (see [page 50](#)).

WWF focused this first Report Card on the use of soy in animal products as this accounts for almost three-quarters of all soy produced globally, and the proportion is even higher for soy used in Europe. This Report Card does not assess the companies' use of soy oil or soy for human consumption.

Method

Companies were assessed according to three engagement levels (commitment, timebound plan and results) across two areas of action (on "responsible soy" and on "no deforestation"). If commitments were public and/or answers were supplemented with documents or web links, the companies were evaluated more positively.

Commitments and results were evaluated positively if related to the RTRS or ProTerra schemes. WWF believes the RTRS is the best system for achieving mainstreaming of responsible soy. For companies that choose non-GM soy, WWF sees RTRS non-GM or ProTerra as the best options. These certification schemes, while not perfect, have the most robust criteria on social and environmental issues, such as forbidding the conversion of all valuable biomes including forests, savannahs and grasslands.

In many cases, companies have clearly set out their commitment to the RTRS for their soy use. However, others, like Marks & Spencer and Waitrose (UK), have been less

clear and have made commitments to source soy from “the best” certified responsible sources “including” the aforementioned schemes. For the purposes of this Report Card, WWF has given these (RTRS member) companies the benefit of the doubt, but urges them to base their commitment to responsible soy more explicitly on the RTRS and ProTerra, or the equivalent, in the future.

WWF also gives some credit for “no deforestation” commitments which many companies have made in the wake of the Consumer Goods Forum resolution to mobilize resources to help achieve zero net deforestation by 2020 (see [page 52](#)). While welcoming “no deforestation” commitments, WWF sees them as incomplete as they do not necessarily protect other biomes like savannahs and grasslands which are being cleared for soy, and they do not address other important issues related to responsible soy production (such as social or other environmental impacts). It is crucial that companies back up their “no deforestation” policies with membership of a credible certification scheme, such as the RTRS or ProTerra, which requires third party verification of all relevant environmental and social standards.

In addition, some of the commitments are captured under companies’ support of the Soy Moratorium. While WWF supports the Moratorium (see [page 52](#)), and gives companies that sign up some credit in the Report Card, it cannot be seen as a comprehensive commitment as it only encompasses the Brazilian Amazon, not other forests or ecosystems affected by soy expansion.

The scope of this assessment did not allow for independent verification of all the information provided by companies. While the Report Card is informed by verifiable data and (publicly) available information where possible, the final assessment is necessarily determined by unverified data provided by companies. It is furthermore based on WWF’s assessment of a company’s intentions if not public and on its actions on responsible soy.

WWF asked companies:

- How much soy do you use in animal feed?
- Do you have policies/commitments for responsible (RTRS/ProTerra) soy and timebound plans? If so, what have they achieved?
- Are you committed to “no deforestation”? What timebound plans and achievements apply?
- Are you committed to no conversion of other valuable landscapes?
- Are you a member of the RTRS or ProTerra? When did you join?
- What supply chain system do you use?
- Do you have a policy on responsible substitution of irresponsible soy with other protein sources or local/regional soy?
- Do you have a policy on non-GM soy?

In all cases WWF asked for documentation and (public) web links to support statements.

The results tables organize the assessed companies into three broad performance categories: “Well on the Path”, “Started the Journey” and “Not Yet in the Starting Blocks”. Companies with the strongest commitments, including a timebound plan, and that actually purchased significant volumes of responsible soy, were graded in the top category. Companies that need to improve on commitments, plans and/or actual purchases were graded in the middle group, while companies that lacked commitments or action, or did not respond at all, were categorized in the bottom group. The tables also indicate which companies have a policy on substitution and/or non-GM soy.

For more information on the Report Card methodology, please visit www.panda.org/soyreportcard/2014.

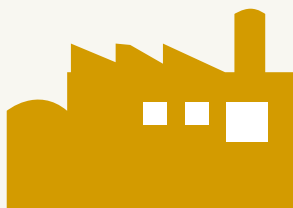


A soy processing facility

© Jan Gilhuis/Solidaridad

WHAT DO THE REPORT CARD RESULTS SHOW?

Some companies are making good progress toward responsible soy – but many others are lagging behind.



SEVERAL COMPANIES THAT HAVE TAKEN ACTION HAVE OUTPACED A MUCH LARGER GROUP OF COMPANIES THAT ARE STILL NOT TAKING FULL RESPONSIBILITY

In the journey toward responsible soy, a small number of companies are making commendable progress to reduce their impact on deforestation and conversion of other valuable habitats. These market leaders have gone beyond promises and policies, and have actually purchased responsible soy. Meanwhile many more are making commitments, which represents a good first step. But it's not enough.

In all sectors there is a contrast between leaders and laggards.

The companies that score well have demonstrated that it is possible to be a responsible member of the soy supply chain and to make strong public commitments to use responsible soy. They also show that companies of all sizes and across all sectors can act responsibly by taking steps to source responsible soy now.

The companies that have taken action have outpaced a much larger group of companies that are still not taking full, or in some cases **any**, responsibility for the environmental and social impacts of the soy they use. Many have started with partial commitments, for example covering only national level use or focusing only on “deforestation-free” soy, but not mitigating other negative impacts of irresponsible soy. WWF calls on companies that have only made partial commitments to enlarge these to cover both the full geographic scope of their usage as well as the full range of issues related to irresponsible soy use.

One positive outcome is that most companies who have not yet progressed, but who did respond to the questionnaire, have asked WWF for more information. This sends a signal that they are receptive to change, and WWF hopes that these companies will get on track by the publication of the next Report Card. It is not too late for these companies to embark on the journey to responsible soy, but they should start now.

There is another category of companies that have not responded and WWF concludes they have not acknowledged the issue at all.

Why are most companies using so little responsible soy?

The complexity of achieving sourcing of responsible soy depends on how deep down the supply chain a company is situated. Because soy is embedded in most meat, dairy and eggs, it can be especially difficult for retailers and manufacturers to know how much soy they are using. Switching to responsible soy to cover all these uses can seem like a daunting and complex task.



**NATIONAL
COMMITMENTS IN
THE NETHERLANDS,
SWEDEN AND
SWITZERLAND
HAVE MADE A BIG
DIFFERENCE IN
RAISING AWARENESS,
CREATING
COMMITMENT AND
SPURRING ACTION**

Still, there is no excuse not to, as a first step, acknowledge the problem and make a commitment to tackle it. WWF encourages all companies to publicly commit and then take action. Actions should include roughly calculating their soy usage, whether it be for animal feed or use in the production of the meat, eggs and dairy they sell, and then buying credits to cover the volume of soy used.

Buying credits is a relatively easy and cost-effective way for companies to move quickly toward 100 per cent responsible soy before traceable supply chains are in place and will help the market to reach critical mass in volumes, so that logistics for developing responsible soy supply chains can be affordable in the long run. For companies already using non-GM soy without environmental or social safeguards, an accessible next step is to buy segregated responsible soy, certified as non-GM RTRS or ProTerra.

Indeed, the results of the Report Card show that some retailers, dairy and feed companies, and the Dutch and Swedish collective group of companies, are already taking these steps, proving that it can be done.

Though not graded in the Report Card, companies in Switzerland that are part of Soy Network Switzerland's commitment to responsible soy have already taken major steps toward traceable supply chains, as 80 per cent of the imports of soy into Switzerland are in the form of physically segregated responsible soy.

The Report Card clearly shows that most animal feed companies and meat and egg companies are dragging their feet. Many consumer goods manufacturers using meat, eggs and dairy in their products have not moved at all.

What supply chain options are companies using?

Some of the companies using responsible soy have reported they are buying RTRS credits to cover the volumes they use. WWF sees the purchase of credits at this stage in the development of the responsible soy market as an important way to immediately reward producers for their responsible production and build up necessary scale. At the same time, where possible, WWF would like to see companies use physical supply chains and welcomes any use of mass balance or segregated systems now and in the future.

[Find out more about RTRS supply chains.](#)



© Declan Doherty

Three-quarters of all soy is used to feed livestock

HOW DID THE COMPANIES SCORE?

The tables are organized into sectors to encourage “like for like” comparisons of company performance.



Key: Progress indicators

Very good

Good

Intermediate

Weak

Insufficient/none

No response

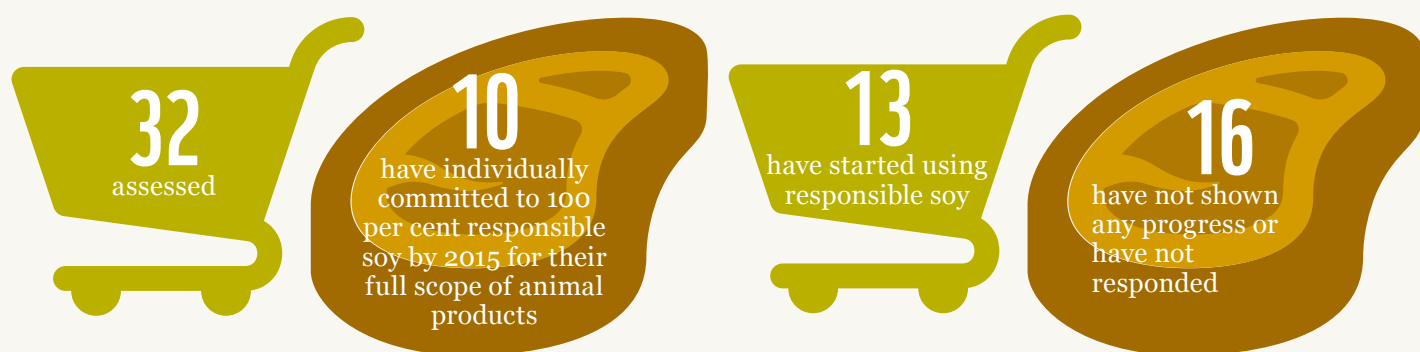
The journey to responsible soy: RETAILERS AND FOOD SERVICE COMPANIES

	COMPANY*	COUNTRY	RESPONSIBLE SOY (RTRS/PROTERRA)			NO DEFORESTATION			RESPONSIBLE SUBSTITUTION?	NON-GM POLICY?
			COMMITMENT/MEMBERSHIP OF RTRS	TIMEBOUND PLAN	ACTUAL PURCHASE	COMMITMENT	TIMEBOUND PLAN	ACTUAL PURCHASE		
WELL ON THE PATH	Ahold	Netherlands	RTRS						NO	NO
	Axfood	Sweden	RTRS						NO	YES
	Coop Sweden	Sweden	RTRS						NO	NO
	ICA Sweden	Sweden	RTRS						NO	NO
	Marks & Spencer	UK	RTRS						YES	PARTLY
	Superunie	Netherlands	RTRS						NO	NO
	Waitrose	UK	RTRS						YES	YES
STARTED THE JOURNEY	ASDA	UK	RTRS						NO	NO
	Carrefour	France	RTRS						YES	YES
	Co-operative Group	UK	RTRS						YES	PARTLY
	Jumbo Supermarkten	Netherlands							NO	PARTLY
	KLM	Netherlands	RTRS						YES	NO
	Martin & Servera	Sweden								
	Morrisons	UK	RTRS						NO	YES
	Sainsbury's	UK	RTRS						NO	PARTLY
	Tesco	UK	RTRS						NO	PARTLY
NOT YET IN THE STARTING BLOCKS	Albron	Netherlands								
	Coop Denmark	Denmark								
	Dansk Supermarked	Denmark								
	Elior	France							NO	NO
	Sodexo	France							YES	NO
	SuperGros	Denmark								
NON-RESPONDENT	Agapes restauration (Flunch)	France								
	Auchan	France								
	Casino	France								
	Compass	UK								
	E.Leclerc	France								
	Iceland	UK								
	Les Mousquetaires/Intermarché	France								
	Nando's	UK								
	Quick	France								
	Système U	France								

Footnote:
 *Within each performance category, companies are listed in alphabetical order.

HOW DID THE RETAILERS AND FOOD SERVICE COMPANIES PERFORM?

Retailers have made some progress, but too many are still lagging behind.



ALMOST NONE OF THE FOOD SERVICE COMPANIES ASSESSED HAVE MADE ANY RECOGNIZABLE PROGRESS, WHICH IS DISAPPOINTING

Overall the Report Card shows that a significant number of retailers have taken steps to commit to and start sourcing responsible soy for animal products, setting an example for other retailers in Europe and the rest of the world. However, an even larger number have made little progress or have not responded. Retailers are generally seen as the first and most important catalyst to responsible sourcing in the supply chain.

Established retail brands topping the Report Card are **Ahold** and **Superunie** (Netherlands); **Axfood**, **Coop Sweden** and **ICA Sweden** (Sweden); and **Marks & Spencer** and **Waitrose** (UK). Only its lack of RTRS membership has prevented **Jumbo Supermarkten** (Netherlands) from being in this top group. Though not included in the Report Card, Swiss retail companies **Migros** and **Coop** have demonstrated leadership since being integrated into the Swiss national commitment.

Retailers that are at the start of their journey and that WWF expects to do better in future Report Cards include **Carrefour** (France); and **ASDA**, **Morrisons**, **Sainsbury's** and **Tesco** (UK).

Unfortunately there are still many retailers and food service companies not yet performing as well as they should, or that have not responded to the questionnaire despite repeated requests. Some of the biggest companies in this category include **Coop Denmark** and **Dansk Supermarked** (Denmark); and **Auchan**, **Casino** and **Les Mousquetaires/Intermarché** (France).

In fact almost none of the food service companies assessed have made any recognizable progress, which is disappointing considering the volume of soy they use and their strong connection with consumers. For example, **Compass** (UK), the world's market leader in food and support services, and **Nando's** (UK), the biggest purveyor of fast food chicken in the country, have not shown any signs of even acknowledging the soy issue or their role in it.

The positive exceptions are the airline **KLM** (Netherlands), with its sustainable catering programme that incorporates responsible soy use, and **Martin & Servera** (Sweden), which has signed up to the Swedish national commitment.

Roundtable membership

Disappointingly, 18 out of the 32 retailers and food service companies scored have still not joined the RTRS or ProTerra – a very basic first step in taking responsibility for the soy they use. On the positive side, the RTRS recently welcomed new members such as **Coop Sweden** and **Tesco** (UK).

Commitments

More encouragingly, 13 companies have made full, partial or limited commitments to use responsible (RTRS) soy and another three have made commitments to “no deforestation” or the Soy Moratorium. But that still leaves 16 making weaker claims, no commitments at all or failing to respond. Given that the use of soy is widespread and growing, as is knowledge of the challenges it poses to sustainability, WWF would have expected a much greater awareness of the issue.

But what do these commitments cover?

Most commitments by retailers only cover their own brands. While this is a first step, in the future WWF asks retailers to take responsibility for everything on their shelves in all the countries where they operate. Only then can they claim that they are doing all they can to ensure that their outlets are free of irresponsible soy.

Using responsible soy

There is some encouragement in the fact that 13 of the companies scored reported that they are using at least some responsible soy already. However, only **KLM** is using levels above 50 per cent and the majority are using none or very little.

Retailers and food service companies play a powerful role

Retailers and food service companies are powerful actors in the food sector. They all need to start pushing manufacturers as hard as they can to take control of their supply chains, and to eliminate irresponsible soy and supply only RTRS or ProTerra soy. This includes asking manufacturers to use 100 per cent responsible soy in all their products.

IN CONCLUSION

These results show there are options for all retailers to act as responsibly as their competitors at the top of the Report Card. It is clearly possible for retailers not only to make the right commitments, but to follow them up with action and to use their influence to shift their suppliers. WWF urges retailers to demand RTRS- or ProTerra-certified soy, and thus send a sustainability signal that impacts the whole supply chain. Only then can their customers be assured they are not contributing to further destruction of valuable landscapes.



© Jan Gilhuis/Solidaridad

Soy meal from soybeans grown in Brazil



Key: Progress indicators

	Very good
	Good
	Intermediate
	Weak
	Insufficient/none
	No response

The journey to responsible soy: CONSUMER GOODS MANUFACTURERS (INCLUDING DAIRY COMPANIES)

	COMPANY*	COUNTRY	RESPONSIBLE SOY (RTRS/PROTERRA)			NO DEFORESTATION			RESPONSIBLE SUBSTITUTION?	NON-GM POLICY?
			COMMITMENT/ MEMBERSHIP OF RTRS	TIMEBOUND PLAN	ACTUAL PURCHASE	COMMITMENT	TIMEBOUND PLAN	ACTUAL PURCHASE		
WELL ON THE PATH	Arla	Denmark	RTRS						NO	PARTLY
	FrieslandCampina	Netherlands	RTRS						PARTLY	NO
STARTED THE JOURNEY	Associated British Foods	UK	RTRS						NO	PARTLY
	BEL Group	France							NO	NO
	Iglo Group	UK								
	Lactalis	France							NO	PARTLY
	Unilever ¹	Netherlands	RTRS						YES	YES
NOT YET IN THE STARTING BLOCKS	Bongrain	France							YES	NO
	Danone	France							NO	PARTLY
	First Milk	UK							YES	NO
	Sodiaal	France							YES	NO
NON-RESPONDENT	Dairy Crest	UK								
	Findus Group/Young's	UK								
	Stegeman	Netherlands								

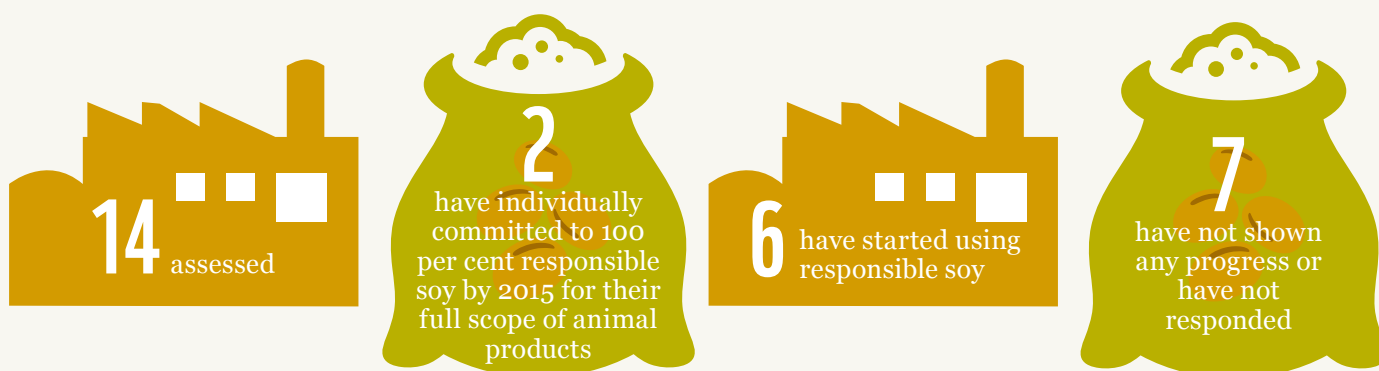
Footnote:

1. For this Report Card Unilever has only been assessed on its policy, plan and results for (indirect) soy use in animal feed, as this is the scope of the publication. Since Unilever's policy on soy oil and direct soy use in food, with volumes 40 times the (indirect) use of soy meal, is very advanced, the rating in this Report Card does not represent their overall achievements on responsible soy.

*Within each performance category, companies are listed in alphabetical order.

HOW DID THE CONSUMER GOODS MANUFACTURERS PERFORM?

WWF is disappointed that so many consumer goods manufacturers are still not taking action on responsible soy.



THE BEST PERFORMERS, SUCH AS ARLA AND FRIESLANDCAMPINA, ARE SHOWING THE WAY, BUT THERE ARE TOO MANY COMPANIES LAGGING BEHIND

Consumer goods manufacturers are companies that produce branded, processed products for consumers. As the scope of this project is restricted to addressing the use of soy in feed for animal products, WWF has assessed companies' use of soy for branded dairy, meat and eggs only and not their (direct) use of soy (oil) in other food products.

Overall the Report Card shows some progress among the consumer goods manufacturers. The best performers are showing the way – but there are still too many lagging behind. The dairy brands **Arla** (Denmark) and **FrieslandCampina** (Netherlands) are leading with commitments and actions on responsible soy. Meanwhile the **BEL Group** (France) has scored highly on actual progress, partly due to its support of WWF projects in Brazil helping soy farmers to improve sustainability and reach RTRS certification.

However, WWF is disappointed that the manufacturing industry is comprised of a substantial number of companies that are still choosing to run the risk of sourcing irresponsible soy, despite the availability of RTRS and ProTerra, particularly on the European market.

Some of these companies are global brand leaders with substantial influence on the European and global market. WWF urges them to follow the good example of **Arla** and **FrieslandCampina** and help set the stage for transformation by the rest of the soy industry.

A special mention must be made for the global consumer goods giant **Unilever** (Netherlands). It is a founding member of the RTRS, and shows global leadership in commitment to and action on responsible soy oil, which the company purchases directly and which represents the biggest volumes of its soy use. Unilever is now starting to require responsible soy for its indirect soy use in animal products, representing less than 5 per cent of its soy footprint. Because this Report Card focuses on soy used for animal feed (and not soy oil), the rating of Unilever does not represent its overall achievements on responsible soy.

Roundtable membership

Only four of the assessed manufacturers are members of the RTRS.

Commitments

Just half of companies have made commitments to responsible soy for use in animal products, “no deforestation” supply chains, or the Soy Moratorium. That leaves seven companies with no commitments at all or no response. This indicates a lack of awareness of the issues surrounding soy by companies that could be seen to be uninterested in offering their consumers responsibly-produced meat and dairy products.

But what do these commitments cover?

Some of the manufacturers that have made commitments to responsible soy, such as **Arla** (Denmark) and **FrieslandCampina** (Netherlands), are applying these to the full scope of their products – whether their own brands or products they make for others to sell. This is welcome and shows the potential for brands to play a role in making responsible soy mainstream.

Using responsible soy

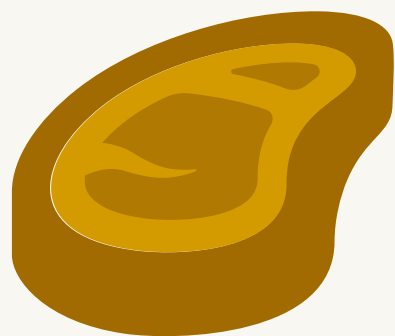
It is positive that several brands are taking these issues seriously and are using responsible soy already. However, WWF is concerned that well-known international brands like **Danone** and **Lactalis** (France) are not yet taking their responsibility seriously.

Manufacturers play a crucial role

Manufacturers are a key player in the soy supply chain. As with retailers they are in a position to push actors further up the supply chain and in particular the non-branded meat companies, feed companies and the traders that are key to shifting entire supply chains to responsible soy. If the industry as a whole is to become more responsible, this needs to happen urgently.

IN CONCLUSION

WWF is disappointed that there are still a large number of companies in the manufacturing industry taking little or no action on responsible soy. WWF hopes that consumer goods manufacturers with a top score will continue to push even harder to help set the stage for transformation of the rest of the soy industry.



Key: Progress indicators

 Very good
 Good
 Intermediate
 Weak
 Insufficient/none
 No response

The journey to responsible soy: MEAT AND EGG COMPANIES

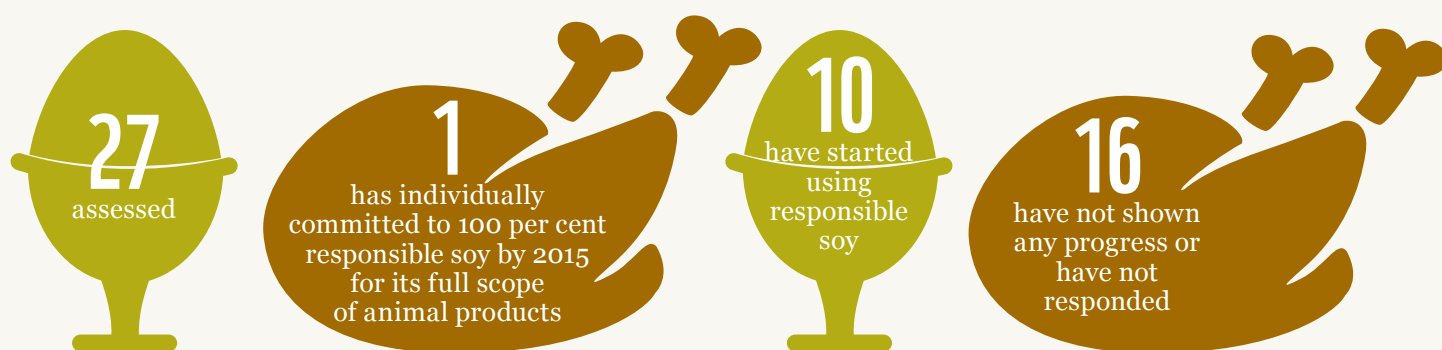
	COMPANY*	COUNTRY	RESPONSIBLE SOY (RTRS/PROTERRA)			NO DEFORESTATION			RESPONSIBLE SUBSTITUTION?	NON-GM POLICY?
			COMMITMENT/ MEMBERSHIP OF RTRS	TIMEBOUND PLAN	ACTUAL PURCHASE	COMMITMENT	TIMEBOUND PLAN	ACTUAL PURCHASE		
WELL ON THE PATH	HKScan Sweden	Sweden	RTRS						NO	YES
STARTED THE JOURNEY	2 Sisters Food Group	UK	RTRS						YES	PARTLY
	Compaxo Vlees	Netherlands							YES	NO
	Danpo	Denmark							NO	NO
	Gebr. Van Beek Group	Netherlands	RTRS						NO	PARTLY
	Matines	France							YES	PARTLY
	Plukon Food Group	Netherlands							NO	NO
	Storteboom	Netherlands	RTRS						NO	PARTLY
	VanDrie Group	Netherlands							YES	NO
	Van Rooi Group	Netherlands							NO	NO
	VION Food Group	Netherlands	RTRS						YES	PARTLY
NOT YET IN THE STARTING BLOCKS	Cooperl	France							YES	PARTLY
	Faccenda	UK							NO	NO
	Tulip	UK								
NON-RESPONDENT	Bernard Matthews	UK								
	Bigard	France								
	Danish Crown	Denmark								
	Groupe Doux	France								
	HKScan Denmark ²	Denmark	RTRS							
	Interovo Egg Group	Netherlands								
	Kwetters Holding	Netherlands								
	LDC	France								
	Moy Park	UK								
	Noble Foods	UK								
	Terrena-Gastronome	France								
	Tican	Denmark								
	Triskalia	France								

Footnote:
2. HKScan Denmark is a daughter company of the Finnish HKScan Group. HKScan Group became an RTRS member in March 2014 and committed publicly on 1 April 2014 that by the end of 2018, all soy used in its entire meat value chain will meet the strict requirements of the RTRS.

*Within each performance category, companies are listed in alphabetical order.

HOW DID THE MEAT AND EGG COMPANIES PERFORM?

Lack of consumer pressure leaves the meat and egg sector trailing behind on the road to responsible soy.



AMONG MEAT AND EGG COMPANIES, IT IS MOSTLY THOSE IN THE NETHERLANDS SHOWING ANY REAL PROGRESS

Sitting in the middle of the soy supply chain and supplying mostly unbranded products, these companies are unknown to most consumers. Lack of consumer pressure can in part explain why this sector as a whole lags behind both retailers and consumer goods manufacturers (including the dairy brands) on the journey to responsible soy.

By and large, it is mostly companies in the Netherlands showing any real progress. This can primarily be attributed to their participation in the Dutch national commitment (see [page 49](#)). These companies include the **Gebr. Van Beek Group** (eggs), **Storteboom** (poultry) and the **VION Food Group** (pork), who have been involved in earlier Dutch soy initiatives as well (including buying the first certified soy in 2011). The best performer is **HKScan Sweden**. The company has individually signed up to the national commitment in Sweden. Its Finnish mother company has just published its global commitment to the RTRS, also covering HKScan Denmark.

Otherwise there is a disappointing lack of leadership on responsible soy in the meat and egg sector.

The large number of non-actors and non-responders in this category shows that much more needs to be done to help shift this sector in a positive direction. Companies that have failed to show progress or submit information include the pork producers **Danish Crown** (Denmark) and **Cooperl** (France), and poultry producers **Groupe Doux** and **LDC** (France), all companies with an international scope.

Roundtable membership

Only six out of the 27 companies are members of the RTRS – a very basic first step in taking responsibility for the soy they use.

Commitments

Just nine companies have made some commitment to use responsible soy. Most of the companies have not even acknowledged the problems inherent in irresponsible soy.

But what do these commitments cover?

Most companies that have made commitments are part of the Dutch national initiative or the Swedish Soy Dialogue (see [page 49](#)). The Dutch commitments are often not individual/company-specific, but rather joint sector organization commitments and cover only the use of soy for production in the Netherlands. While WWF welcomes the Dutch initiative, and especially its results of past years, it urges these companies to make individual commitments as well, while improving implementation to ensure that all the products they produce and trade, including in their international operations, contain RTRS soy by 2015.

Using responsible soy

Again, the tangible progress in this sector is mostly attributable to the use of soy via the Dutch national commitment, and of individual companies such as **Matines** (France) and **HKScan Sweden**. WWF welcomes this progress but notes that it is disappointingly little uptake from a sector that uses large amounts of soy.

The role of the meat and egg sector

Companies in this sector consume a lot of soy meal via the chickens, poultry, pigs and cows they process. They could influence a powerful shift if they took their responsibility seriously and demanded responsible soy from the feed companies that supply them.

IN CONCLUSION

These results show that meat and egg companies, being relatively invisible to consumers, feel little pressure to shift their practices. The Report Card helps unveil the sustainability progress of these companies to their customers in the supply chain. WWF asks companies that buy these meat and egg products to demand responsible soy from their suppliers and for the meat and egg companies to ask the same of farmers and feed companies. Companies exerting B2B market pressure is one strategy that can help make the shifts needed to ensure a sustainable supply of responsible soy.



Key: Progress indicators

	Very good
	Good
	Intermediate
	Weak
	Insufficient/none
	No response

The journey to responsible soy: ANIMAL FEED MANUFACTURERS

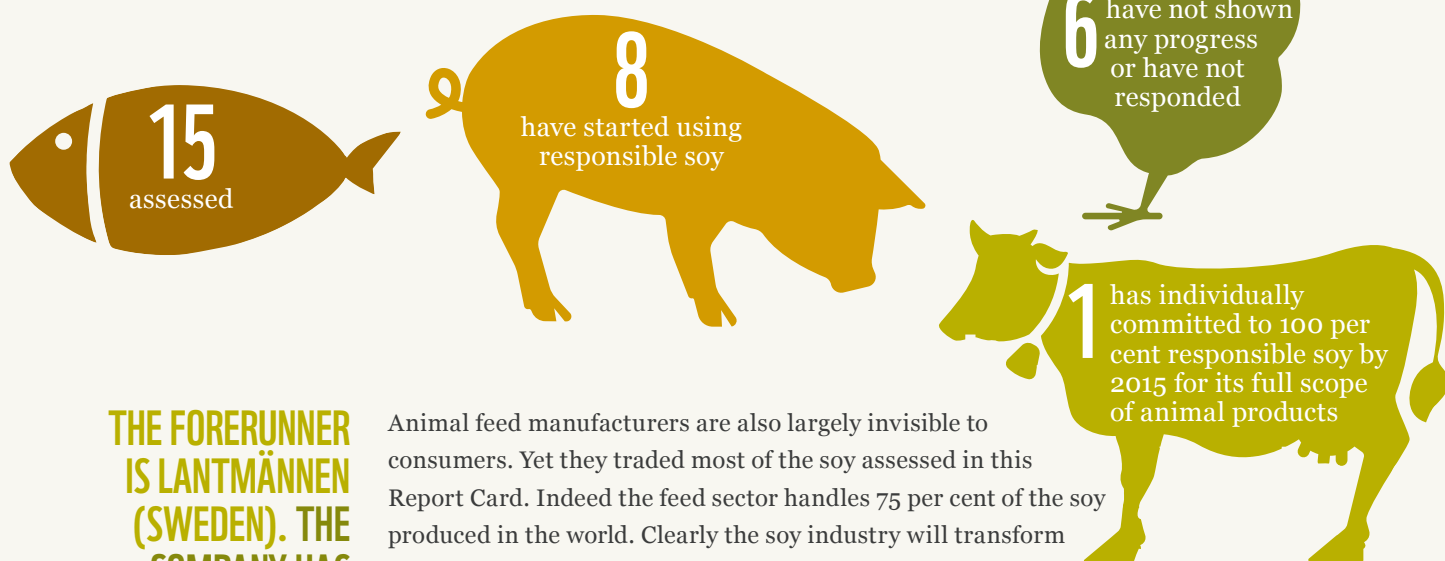
	COMPANY*	COUNTRY	RESPONSIBLE SOY (RTRS/PROTERRA)			NO DEFORESTATION			RESPONSIBLE SUBSTITUTION?	NON-GM POLICY?
			COMMITMENT/ MEMBERSHIP OF RTRS	TIMEBOUND PLAN	ACTUAL PURCHASE	COMMITMENT	TIMEBOUND PLAN	ACTUAL PURCHASE		
WELL ON THE PATH	Lantmännen	Sweden	RTRS						YES	PARTLY
STARTED THE JOURNEY	AB Agri	UK	RTRS						NO	PARTLY
	Agrifirm	Netherlands	RTRS						YES	NO
	BioMar	Denmark	RTRS						NO	PARTLY
	De Heus	Netherlands							YES	NO
	ForFarmers	Netherlands	RTRS						YES	NO
	Glon Sanders	France							YES	PARTLY
	Hamlet Protein	Denmark							NO	YES
	Nutreco	Netherlands	RTRS						NO	PARTLY
NON-RESPONDENT	BOCM PAULS	UK	RTRS							
	DLA Agro	Denmark								
	DLG	Denmark								
	InVivo	France								
	Le Gouessant	France								
	Svenska Foder	Sweden								

Footnote:

*Within each performance category, companies are listed in alphabetical order.

HOW DID THE ANIMAL FEED MANUFACTURERS PERFORM?

Despite handling three-quarters of the soy traded in their countries, this sector is showing a lack of leadership.



THE FORERUNNER IS LANTMÄNNEN (SWEDEN). THE COMPANY HAS SHOWN STRONG LEADERSHIP ACROSS THE BOARD

Animal feed manufacturers are also largely invisible to consumers. Yet they traded most of the soy assessed in this Report Card. Indeed the feed sector handles 75 per cent of the soy produced in the world. Clearly the soy industry will transform faster with the feed sector in the Report Card on board.

The forerunner is **Lantmännen** (Sweden). The company has shown strong leadership across the board in terms of international commitments, plans and actual purchase, followed by fish feed company **BioMar** (Denmark). Though not included in the Report Card, **Fenaco** (Switzerland) should be mentioned for its leadership on responsible soy in the Swiss Soy Network.

Similar to the results in the meat and egg sector, it is again mostly feed companies in the Netherlands that have shown any real progress on responsible soy, which again is largely attributable to the participation of the feed industry in the Dutch national commitment. This reiterates the importance of national initiatives to get unbranded companies involved in market transformation.

However, the Dutch feed industry (including **Agrifirm**, **De Heus** and **ForFarmers**, all large international companies) has only committed to responsible soy for national use, and has not extended its commitment to the international operations of its signatory companies.

In an encouraging move, **Glon Sanders** (France) has started buying ProTerra soy. Furthermore **Hamlet Protein** (Denmark) is ahead of the curve in excluding Amazon soy, and in buying ProTerra-certified soy, in comparison to its Danish counterparts who are lagging behind despite the key role that Denmark plays in Europe's meat export business.

Beyond these examples, there is a lack of leadership in the feed sector in relation to responsible soy. Some of the companies that did not respond to WWF include **DLA Agro** and **DLG** (Denmark); **InVivo** (France); and **Svenska Foder** (Sweden), which is owned by DLG.

Roundtable membership

Just seven out of the 15 feed companies assessed are members of the RTRS – a very basic first step in taking responsibility for the soy they use.

Commitments

Only seven feed companies have made some sort of commitment to use responsible soy. Most of the companies have not even acknowledged the problems inherent in irresponsible soy.

But what do these commitments cover?

BioMar (Denmark), an international fishfeed company, has made a global commitment, though without a timebound plan. While it has purchased a large quantity of responsible soy, WWF urges BioMar to set a clear timeline in order to reach 100 per cent.

Lantmännen (Sweden) has set an example by committing to 100 per cent responsible soy. Most of the other companies that have made commitments have done so as part of the Dutch initiative. This means the commitments cover only the use of soy for national production, and not production abroad. WWF asks that these companies make an additional (individual) commitment to use responsible soy, including in all their international operations.

Using responsible soy

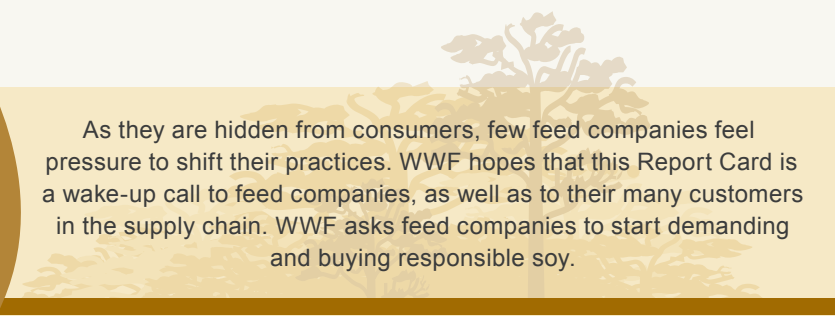
Most of the use of responsible soy in this sector is by **BioMar** (Denmark) and **Lantmännen** (Sweden), and the companies under the Dutch national commitment.

The role of the feed sector

Companies in this sector buy soy from international traders and then produce and sell the feed that ends up embedded in most of Europe's meat, dairy and eggs. Their support is crucial for the transformation of the market.



IN CONCLUSION



As they are hidden from consumers, few feed companies feel pressure to shift their practices. WWF hopes that this Report Card is a wake-up call to feed companies, as well as to their many customers in the supply chain. WWF asks feed companies to start demanding and buying responsible soy.

CONCLUSIONS

The WWF *Soy Report Card 2014* reveals that there has been some leadership among companies

along all points of the soy supply chain for animal feed. However, many more companies need to take their responsibility more seriously.



**COMPANIES CANNOT
REST ON EARLY
PROGRESS. THEY
NEED TO PUSH
ALL THE HARDER
TO BUILD MORE
MOMENTUM FOR
THE MARKET AT THIS
CRUCIAL STAGE IN ITS
DEVELOPMENT**

The implications for most companies are clear; they need to shift gears immediately and accelerate their use of responsible soy.

Joining a credible scheme like the RTRS or ProTerra should be seen as the first and most basic step – though many of the assessed companies have not done even that. Going further and making clear public commitments to use only responsible soy by 2015 is also important, but it is even more essential to take early action to deliver on those commitments.

The availability of a variety of options for how to source and use responsible soy, coupled with the fact that there is a surplus of responsible soy available, means that there are simply no excuses for companies not to accelerate their sourcing of it.

The Report Card also reveals that in some European markets (such as the Netherlands, Sweden and UK), significant progress has been made among companies on responsible soy. Dutch and Swedish companies routinely scored at the top of their sectors, which can be mostly attributed to the power of their national industry commitments. Meanwhile, individual UK retail companies are ahead of the curve, although their commitments have not always translated into purchase of responsible soy.

However, these companies cannot rest on this early progress. They need to push all the harder to build more momentum for the market at this crucial stage in its development. RTRS credits are an accessible way to get into the market and can be purchased immediately. Therefore WWF urges all companies to “walk the talk” and start buying.

In France, the “leader position” is still vacant and WWF calls on French companies to follow the examples of their more advanced European competitors.

The Danish market, despite having one of the largest animal products production industries in Europe, has not progressed as far as other countries in the Report Card. WWF calls on Danish players to follow the good example of the Danish dairy company Arla.

Another general trend is that retail has more leading companies in the Report Card than the other sectors. Due to the complexity of the soy supply chain, it is not surprising that unbranded companies do not feel the same consumer pressure. Retailers should play a key role by encouraging their own suppliers to do the

right thing. Demand responsible soy NOW. We will only be able to truly eliminate irresponsible soy from the products we buy if we all take action.

Another positive conclusion that WWF draws from this exercise is that there is more knowledge and awareness in the soy supply chain than expected. Many companies have started to calculate the amount of soy they use. Only with this information can they confidently set targets for covering this use with responsible soy. And by making targets public, companies that buy soy can send a signal to soy farmers regarding how much responsible soy will be needed in the future.

Still, a third of the companies did not respond to WWF, which indicates that awareness among those companies is still low.

Time is running out for soy users to take action. If they fail to do so, a unique opportunity to create a long-term sustainable supply of responsible soy will be lost. For valuable forests, savannahs and grasslands in South America, and the communities within them, this loss will be irreversible.



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Children in a Chiquitanan village: soy expansion does not always lead to improved living standards for local people

RECOMMENDATIONS

Both companies and consumers need to take action now on responsible soy.

We all have a responsibility and a role to play in helping to reduce the negative environmental impacts of soy production.

What can companies do?



- Join the RTRS and commit to 100 per cent RTRS-certified soy for the full scope of use under a timebound plan;
- Calculate soy use, and begin purchasing RTRS-certified soy, or animal products based on RTRS-certified soy, as soon as possible;
- Buy RTRS credits to increase responsible soy capacity in the short term, while supporting the development of mass balance and, ideally, fully segregated certified supply chains;
- Initiate or join national initiatives on responsible soy to create momentum in the market, but also make individual, company-specific commitments to responsible soy;
- Support programmes to help producers implement BMPs and achieve certification;
- For non-GM soy, choose and support the development of RTRS non-GM production and supply chains. When buying ProTerra-certified soy, ask for improvement of governance and verification;
- Explore ways of reducing food waste and consumption of animal products;
- Explore responsibly-produced and locally-grown alternatives to imported soy.

What can consumers do?



- Ask retailers and brands to commit to responsible soy throughout their supply chains;
- Choose animal products from companies that have committed to and started buying RTRS soy;
- If you're concerned about GM soy, ask your retailer about RTRS-certified non-GM soy or ProTerra;
- Consider reducing your consumption of meat, eggs and dairy products – for most people in OECD countries, this will result in a diet closer to government health recommendations;
- Reduce food waste by planning your shopping and meals carefully – only buy and prepare as much as you need.

APPENDICES



© Jan Gilhuis/Solidaridad

Whole soybeans

MULTI-STAKEHOLDER SOY INITIATIVES

Formed in 2006, the Round Table on Responsible Soy (RTRS) aims to produce globally applicable standards to help build a market for responsible soy. ProTerra offers a standard for non-GM soy.

The Round Table on Responsible Soy



The RTRS is a multi-stakeholder initiative whose members include soy producers and traders, environmental and social NGOs, finance institutions, manufacturers, retailers and companies in the feed industry. It has more than 150 members from 20 countries.

The organization has developed and implemented global standards for the responsible production, processing and trade of soy; developed a certification system; and works to build a market for certified-responsible soy.

The RTRS standard, which has been formulated through a rigorous, transparent, multi-stakeholder process, bans the conversion of native forests and non-forest habitat such as grasslands and wetlands of high conservation value.

It also demands legal compliance, conservation and, where needed, restoration of riparian vegetation areas and respect for land tenure claims. It promotes BMPs and ensures fair working conditions too. The RTRS also encourages chain-of-custody certification along the supply chain to make sure claims about products containing responsible soy in the marketplace can be verified. In addition, it includes a non-GM module.

Producers have been certified in Brazil, Paraguay, Argentina, Uruguay, the United States, China and India. In 2013, the RTRS certified over 1 million tonnes of soy. Total certified soy since 2011 is 2.5 million tonnes. Unfortunately slow market uptake means that only 55 per cent of this has been sold.

WWF supports the RTRS and is committed to working within it to strengthen its criteria and to increase the market uptake for responsible soy. WWF works with other RTRS members to continuously strengthen the scheme by participating on the Executive Board, as well as in a number of working groups. As a partner, WWF retains the right to criticize the platform when we feel it is necessary.

For companies that buy and use soy, the RTRS can offer them the assurance that the products they sell have not been produced with “tainted soy”, thereby reducing reputational risk and providing an option for market differentiation.



ProTerra

In 2004 WWF-Switzerland and the Swiss retail chain Coop developed a set of criteria for responsible, non-GM soy, known as the Basel Criteria. This evolved into the ProTerra standard, created in 2006 by CERT ID, a private company. In 2012, the ownership and responsibility for the ProTerra certification programme was transferred to the ProTerra Foundation, an independent, not-for-profit organization.

Suppliers from Brazil meeting the ProTerra requirements have an annual capacity of around 4 million tonnes. ProTerra's standard is comparable to the RTRS's, but WWF believes the scheme's governance, transparency and level of assurance need to improve. The standard offers a label, which may be used in the consumer market.



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Soy is an ingredient in the feed for animals used in dairy production

PROGRESS IN MARKETS FOR RESPONSIBLE SOY

There are opportunities and challenges related to responsible soy across global markets.

China



China used to be an important producer and exporter of soy. It was the first country to cultivate soy and still produces approximately 12 million tonnes per year, with an average farm size of only 0.2-0.3ha. Average yields are low, and can potentially be increased. The NGO Solidaridad has recently established projects to support Chinese farmers with BMPs, so these producers can eventually meet RTRS standards. In November 2013 the first Chinese company, Sinograin, became certified for 20,103ha of its production area.

However, China's rapid economic development is leading to higher meat consumption. As a result, China has become a net importer of soy since the 1990s. Soy consumption doubled in the last decade, from 26.7 million tonnes in 2000 to 55 million tonnes in 2009, of which 41 million tonnes were imported. China's imports are projected to increase by 59 per cent by 2021-22.

Between 2000 and 2010, soy trade between China and Brazil increased tenfold. Almost half of Brazil's soy exports go to China. While Europe predominantly imports soy meal, China imports whole soybeans, which are crushed locally. China's increasing demand will lead to even larger exports from Brazil and the United States, as well as from other producers such as Argentina and Paraguay.

The changing destination of trade could have political and environmental impacts. In recent years, pressure from European consumers and environmental organizations has helped to check the spread of soy into natural ecosystems, notably the Amazon. To date, Chinese consumers have not demonstrated the same concern over deforestation. However, because of its importance to food security, the long-term sustainability of soy and the effects of climate change on soy productivity and soy prices could be important issues for China in the future.

Considering its role as the world's major soy importer, China will need to increase its use of responsible soy if the global soy industry is to shift toward greater responsibility.

Multinational companies, including several companies in the Report Card, have a part to play in introducing responsible soy to China. WWF calls on all companies that use soy to make global commitments, thus helping their subsidiaries and partners around the world to take the next steps toward responsible soy.

Denmark



Total import of soy into Denmark is 1.6 million tonnes, which is used mainly in the feed industry for animal products for internal consumption and for export. The Danish Ministry of Food, Agriculture and Fisheries has convened stakeholders in the Danish value chain to establish a national process focused on creating a national commitment to the responsible sourcing of soy (and palm oil). The initiative's working group is made up of representatives from the animal feed industry, meat industry, dairy industry, retailers and NGOs along with the Ministry of Foreign Affairs. Unfortunately, to date, these efforts have failed to result in an industry commitment to responsible soy, which is one reason why Danish companies fared poorly in the Report Card.

Finland



WWF-Finland assessed soy usage on a national scale for the first time in 2012. It surveyed the amount, origin and quality of soy used and results showed that companies were already aware of the environmental and social issues surrounding soy production.

The **survey** revealed some companies had already taken steps toward using responsible soy, with approximately a quarter of all soy used in Finland being sourced responsibly. As a result, a national target to use only responsible soy in Finland by 2015 was set. WWF-Finland continues to encourage and support companies to achieve this target, challenging all major companies in the soy supply chain to work toward it.

France



France is Europe's second largest soy importing country. It imported 4.3 million tonnes of soy in 2013, and most of that was used to feed animals.

The two main feed company associations, SNIA and Coop de France Nutrition Animale, which represent 80 per cent of French feed companies, have created the "Sustainable Procurement for Animal Feed" platform. With over 15 feed companies as members, the platform is focused on identifying responsible sources of animal feed into France, including both imports of responsibly-produced protein and substitution of imports with responsible locally-grown protein sources. WWF-France has welcomed the platform, while publicizing its concerns that so far procurement of responsible soy has not been a priority for the initiative.

France has more land devoted to agriculture than any other country in Europe. Some local protein alternatives to soy are grown in France, like rapeseed and sunflower, allowing substitution of imported protein sources like soy. Such local sources have already enabled France to be less dependent on imported proteins than most countries in the EU. Currently, French dependency on imported protein sources accounts for "only" 56 per cent of the country's total usage, compared to the European average of 77 per cent. However, as noted above, the French industry has not taken much action regarding the responsible sourcing of soy and only limited amounts of ProTerra soy have been purchased by players in the French market to date.

India



In India most soy is grown by smallholders. Some 5 million smallholders grow soy on 1-2ha each and there is potential to increase productivity considerably. NGO Solidaridad, with funding from European companies such as FrieslandCampina (Netherlands), has set up several projects to help Indian producers to implement BMPs and reach RTRS certification. These have resulted in a significant increase in yields (up to 54 per cent) and lower use of agrochemicals. In 2013, 16,778 farmers in India were RTRS-certified.

While 4 million tonnes of its total 11 million tonnes of soy is exported as soy meal, India is a net importer of soy oil. Over 1 million tonnes of soy oil is imported to India from Argentina and to a lesser extent Brazil, for use as cooking oil. Because all soy grown in India is non-GM, there is a growing interest from Europe in Indian soy meal and lecithin.

The Netherlands



Dutch companies are significant users of soy, for production within the country. Two-thirds of the soy used for feed in the Netherlands is later exported as animal products. This internal use of soy totals around 1.8 million tonnes. Some Dutch companies also have significant international operations. Meanwhile the Netherlands is a major trader of soy, with an annual turnover of around 8.7 million tonnes.

Pushed by a strong coalition of NGOs, the subject of responsible soy has been on the agenda of companies for quite some time. The Netherlands is the consumer country with the highest number of RTRS members (23).

In December 2011, the Dutch soy supply chain committed to source 100 per cent RTRS soy or equivalent for total production of animal products in the Netherlands by 2015. Retail companies additionally committed to specify only RTRS soy for imported goods by 2015. Meanwhile, the Dutch Sustainable Trade Initiative (IDH) agreed to invest in projects to help farmers in South America reach RTRS certification, to help boost supply.

In 2013, 417,116 tonnes of RTRS-certified soy (23 per cent of all soy used in the Netherlands) was purchased by the organization that was set up to facilitate the transition. Though less than the 50 per cent planned, this was by far the largest purchase of RTRS credits thus far. Due to the nature of the group purchase, these cannot be allocated to a specific sector or to specific buyers. Therefore, in their answers for the Report Card, the companies involved have reported purchasing 23 per cent of their national use.

It should be noted that many Dutch companies also have operations outside the Netherlands that are not included in the national commitment. Except for the retailers, most companies have not committed individually but through their sector organizations. Implementation of the commitment is currently at a critical stage. As the plan from last year was only half fulfilled, WWF urges the initiative to step up and fully implement its plan by purchasing 1.5 million tonnes of RTRS soy in 2014.

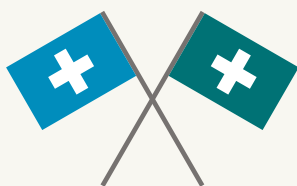
Sweden



As part of the Swedish Soy Dialogue, 27 Swedish food companies and organizations have pledged that in 2014, at least 60 per cent of the soy they use and/or sell will be responsibly produced, rising to 100 per cent in 2015. This commitment covers the national production of meat, eggs and dairy, but also soy in animal products imported by retailers, food service companies and consumer goods manufacturers.

Signed by trade associations, feed industry companies, food manufacturers and retail chains, this voluntary agreement ensures that the soy consumed in Sweden will eventually be produced responsibly under either the RTRS or ProTerra systems. While this commitment covers only domestic use of soy, including imports of retailers, food service and brands, some of the companies in the Dialogue have also made commitments to responsible soy for global operations, such as Arla and HKScan's mother company in Finland. It is expected that this initiative will encompass even more companies in the future.

Switzerland



SOJA

soja netzwerk schweiz
réseau suisse pour le soja
rete svizzera per la soia
soy network switzerland

Switzerland is the most advanced market for responsible soy. Its sustainability efforts are spearheaded by Soy Network Switzerland, a joint venture by 14 main players from the Swiss agriculture and food industries, including Switzerland's biggest retailers, Coop and Migros.

The Network was formed to promote the production and marketing of responsibly-produced soy. It aims to ensure that in 2014, 90 per cent of soy used in Switzerland is certified as segregated responsible and GM-free (accredited by RTRS non-GM, ProTerra, Bio Suisse or Danube Soy certification schemes).

In 2013, 80 per cent of all soy imported for feed in Switzerland was certified according to these schemes (261,617 tonnes). Swiss industry has also been very proactive in investing in future supply by building up supply chains in India.

Find out more about the network at www.soynetwork.ch

The main Swiss players have not been assessed as part of this Report Card since they have all individually signed the voluntary commitment of Soy Network Switzerland. However, since 80 per cent of soy in Switzerland was credibly certified-responsible soy in 2013, companies like RTRS members Migros and Coop should be seen as ranking among the best performers in the Report Card.



UK

The UK imports 2.9 million tonnes of soy every year, as well as significant volumes of animal products. Companies' awareness of the issues around irresponsible soy production is high, thanks to NGO awareness raising campaigns, such as WWF-UK's "Save the Cerrado" campaign in 2010.

Most UK retailers are RTRS members and the major ones have joined forces with major "continental European" retailers to form the Retailers' Soy Group, for which they have a designated representative that sits on the RTRS Executive Board. Additionally,

several companies are members of the European Soy Customer Group that supports the Soy Moratorium. Currently no official national process committing to responsible soy has been initiated in the UK.



US

The US is currently the largest global producer of soybeans, producing 82.5 million tonnes in 2013. Of these, 35.9 million tonnes were exported and 48.4 million tonnes were consumed.

77.2 per cent of domestic consumption was for poultry feed (37.6 per cent), swine feed (24.3 per cent), and cooking oil (15.3 per cent). For international consumption, the majority (81.7 per cent) was used for poultry feed (44.9 per cent), swine feed (17.2 per cent), cooking oil (11.5 per cent) and aquaculture feed (8.1 per cent). Main export destinations for US soybeans, meal and oil include China, the EU and Japan.

US soybeans have played a crucial role in feeding the world, and while farmers have made improvements over the past 30 years on per bushel basis in terms of land use, soil erosion, energy use and GHGs, net impacts on natural resources are large, especially for land use, which has increased. From 1990 to 2013, the area used to grow soy expanded from 22.9 million to 30.7 million ha, a trend that has increased recently with conversion of 2.4 million ha of grasslands and wetlands to soybean production from 2008 to 2011.

To address these issues, WWF and other NGOs are members of Field to Market — the Alliance for Sustainable Agriculture because of their outcomes-based approach to continuous improvement and supply chain membership. While some soy producers have made improvements, there is still a need for greater adoption of BMPs and continual progress to protect ecologically important areas from conversion and to efficiently use finite natural resources such as water and soil. In 2013 The DeLong Co. Inc was the first US company to achieve RTRS certification.

The role of traders



Soybean trading and crushing in the four South American soybean production countries is dominated by a limited number of large, international commodity trading companies. The four most important are ADM, Bunge, Cargill and Dreyfus. There are also a larger group of medium-sized companies.

Although these trading companies usually don't invest in soybean growing as such, they have a large influence on the expansion of the sector. Soybean farmers are often very dependent on these trading companies for seed, credit, other inputs and off take. Through their control of the EU export market, they also provide the production sector with opportunities for expansion. These traders are therefore in a perfect position to promote responsible soy production and trade.

Though all the large traders are RTRS members, only some of the medium-sized ones (Amaggi, Cefetra, Vanden Avenne, Denofa, AGD and Nidera) have been trading RTRS

soy (credits). Amaggi and Nidera also function as soy producers and have achieved RTRS certification for some of their soy farms.

The Soy Moratorium



Established in 2006, after advocacy from NGOs and pressure from consumers, the Soy Moratorium is a compromise solution which pledges not to trade soy from deforested areas within the Amazon biome after July 2006. It was set up by ABIOVE (Brazilian Vegetable Oil Industry Association) and ANEC (Brazilian Grain Exporters Association) and their respective member companies. Several NGOs support the initiative, including WWF and Greenpeace.

The results of the Moratorium have been encouraging. Monitoring has shown that between the 2007-8 and 2012-13 harvests, less than 1 per cent of soy cultivated in the Amazon was in recently deforested areas.

Companies should note that the Soy Moratorium only covers soy linked to deforestation in the Brazilian Amazon. Unfortunately, today, it is the Cerrado which is under the most pressure from soy expansion. In fact, according to Brazil's Environmental Ministry, 50 per cent of the Cerrado has already been cleared for crops, livestock and other uses. Companies must also now look to protect this critical ecosystem.

The current Moratorium is due to expire in December 2014 and a working group has been convened to finalize a follow-up initiative.

Consumer Goods Forum resolution



The Consumer Goods Forum (CGF) is a global industry network of more than 400 retailers, manufacturers, service providers and other stakeholders across 70 countries, with combined sales of EUR 2.5 trillion.

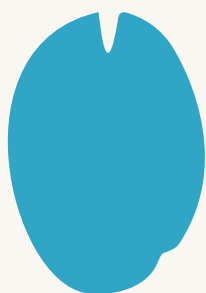
In November 2010, the CGF Board announced a Resolution on Deforestation, including a pledge to mobilize resources within its respective businesses to help achieve zero net deforestation by 2020. This will be achieved both by individual company initiatives and by working collectively in partnership with governments and NGOs.

The CGF works with other stakeholders – such as NGOs, development banks and governments – to create funding mechanisms and other practical schemes to incentivize and assist forested countries to conserve their natural assets and enable them to achieve the goal of zero net deforestation, while at the same time meeting their goals for economic development.

The CGF's Soy Working Group is currently working on setting sourcing guidelines for responsible soy. WWF calls on all companies in the CGF to also make their own individual global commitments to responsible soy.

SUBSTITUTION OF IMPORTED SOY

WWF believes responsible substitution is worth exploring.



**WWF ASKS
COMPANIES
EXPLORING
SUBSTITUTION OF
IMPORTED SOY
TO PURCHASE
RESPONSIBLE SOY TO
COVER THEIR USAGE
IN THE SHORT TERM**

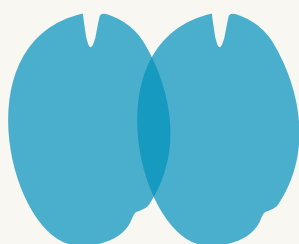
As a response to the growing concerns about the impact of expanding agriculture on ecosystems in South America, as well as excessive dependence on imports for meeting domestic protein needs, some European stakeholders have started initiatives to explore responsible substitution. Their goals are to build high quality European protein supplies customized for the requirements of the European market and, in some cases, to address the demand from some European consumers for GM-free soybeans and soy protein feed. Examples of such initiatives include **Danube Soya**.

WWF supports exploring responsible substitution as a possible complementary strategy in the future to building a market for responsibly-produced imported soy. However, as there are implications for land and water use as well as potential environmental and social issues, these strategies will take time to develop.

Due to the slow nature of these processes and the likely continued dependency on soy imports in the short and long term, companies should at the same time take immediate action to source responsible soy, instead of continuing to use irresponsibly-produced soy.

GENETICALLY MODIFIED SOY

WWF does not support genetic modification, but must work with soy producers regardless of their production system.



**WWF BELIEVES
THAT NON-GM
ALTERNATIVES
SHOULD BE
AVAILABLE FOR ALL
COMMODITIES**

WWF does not promote or endorse genetic modification. We think more research is needed into the impacts of GM organisms, and that no GM products should be released into the environment without a transparent, comprehensive environmental impact assessment and strong safeguards in place. WWF also believes that non-GM alternatives should be available for all commodities.

However, the fact remains that GM soy accounts for over three-quarters of global soy production. In most of North and South America, the proportion is even higher, reaching 99 per cent in Argentina and 89 per cent in Brazil.

If conversion of high conservation value areas, protected areas and unsustainable social development are to be curbed effectively, WWF has to engage with key soy producers, regardless of production system. Engaging in a dialogue with GM soy producers does not mean supporting GM soy.

[Read more about WWF's position on GM products.](#)



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This farm, in Paraná, Brazil, uses no-till cultivation, which can improve soil quality and carbon levels, and reduce erosion and chemical inputs

100%
RECYCLED

BIODIVERSITY

Biodiversity, ecosystems and ecosystem services – our natural capital – must be preserved as the foundation of well-being for all.

BIOCAPACITY

It takes 1.5 years for the Earth to regenerate the renewable resources that people use, and absorb the CO₂ waste they produce in that same year.



BETTER CHOICES

Living within ecological boundaries requires a global consumption and production pattern in balance with the Earth's biocapacity.

EQUITABLE SHARING

Equitable resource governance is essential to shrink and share our resource use.



Why we are here

To stop the degradation of the planet's natural environment and to build a future in which humans live in harmony with nature.

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