

Prepared for the UK Roundtable on Sustainable Soya
October 2020

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Executive summary

In 2019 the **UK imported 3.5 million tonnes of soybean equivalents** representing the volume of whole soybeans required to produce the total quantity of soya imported by the UK.

When combined with the volume of embedded soya imported into the UK, the total consumption amounts to around 4.2 million tonnes soybean equivalent. The majority of this, approximately 75%, is used within animal feed, meat, dairy and eggs.

Based on confidential member submissions and feedback from traders and certification scheme owners, it is estimated that **32% of soya imported into the UK in 2019 was covered by a deforestation and conversion free certified soya standard**. Whilst this represents a small (5%) increase compared to 2018, within this we have seen an increase in the uptake of physical certification (2% to 7%) moving beyond book and claim-based policy compliance. If soya sourced from territories considered at low risk of deforestation (North America and Canada) and soya covered by an Amazon Soy Moratorium contract are added to this figure, **the total proportion of soya imported into the UK in 2019 considered to be from sources at low risk of deforestation/conversion or covered by a deforestation and conversion free certified soya standard amounts to 62%**.

We have seen encouraging progress from the Roundtable's industry members. This year 70% of Roundtable members had a policy in place, a 20% increase from last year. Of those who did not have a policy in place, all were buying book and claim certification to cover some (in some cases all) their soya sourcing. There has also been a small increase in those members with clear timebound plans, now 60%, a 10% increase. Members have demonstrated significant progress in implementation, with many reporting 100% compliance with their policy commitments to purchase book and claim certified soya covering their entire volumes by the end of 2020.

The UK's approach continues to act as an example to other national initiatives across Europe, with lessons being shared directly with the French, Danish and Swedish national initiatives. The ongoing discussion and progress being made through such exchanges led to the development and publication of a pan-European Joint Sustainable Soy Declaration in 2019 and the creation of a formalised platform for European national initiatives to work together to build a consistent European market message.

While the Roundtable and UK industry continue to make progress, challenges remain. There is a priority need to increase the uptake of sustainable soya, building on the progress achieved to date, in particular supporting the livestock industry to accelerate progress and reaching out to those sectors not yet fully engaged and in need of further support. Over the coming year, the UK Roundtable will deliver this support through a sector-led approach, likely to include food service and animal feed sectors. The Roundtable will look to identify approaches that can be replicated across multiple sectors.

There remains the need to accelerate work on industry-wide solutions in order to simplify sustainable choices and provide the means to mainstream sustainable soya in the UK. Building on the review of the FEFAC Soy Sourcing Guidelines and opportunities through UK feed assurances schemes, 2021 can be a year to set down concrete implementation plans to integrate sustainable soya into animal feed.

Identifying approaches to sharing data across the supply chain, specifically volume, country of origin and sustainability claims are key to ensuring transparency and supporting sustainable sourcing decisions. Work next year, in conjunction with the Soy Transparency Coalition, traders and other key RT members, will support this evolution in data sharing.

Outside of the UK we will look to strengthen global engagement with other key consumer countries across Europe and in China, to align and magnify the demand-side signal. This includes building on existing relationships with other European national initiatives and through the China Sustainable Soy Trade Platform. Equally, we need to continue to explore opportunities for global engagement and collaboration with producers, supporting platforms in Argentina, Brazil and Paraguay including newly emerging landscape initiatives.

The rising ambitions of the private sector are clear, both in soya with the creation of the Soy Transparency Coalition and the review of the FEFAC Soy Sourcing Guidelines, but also across commodities with this year's launch of the CGF Forest Positive Coalition of Action, which aims to act within and beyond individual supply chains across soya, palm oil and paper. Combined with the EC Action Plan on Forests and the renewed commitment of the Amsterdam Declaration Partnership there is a clear, growing momentum for change that the UK can be a part of towards deforestation free commodity supply chains.

Looking forward

It was originally hoped that 2020 would mark a significant year for sustainability in the UK as we prepared to host COP26 and take up the Chair of the Amsterdam Declaration Partnership. Whilst these events have been postponed to 2021 due to the global Covid-19 pandemic, we have seen a shift in the global dialogue in favour of an economic recovery rooted in long term sustainability, rebuilding with a sustainability ambition.

This is a time for accelerated action; at the release of this report the Convention on Biological Diversity (COP15) and COP26 are just seven and twelve months away. These are opportunities to catalyse global change, building on rising UK Government ambitions as demonstrated by the Global Resource Initiative, proposals for a due diligence obligation on forest-risk commodities and the development of the National Food Strategy.

Significant challenges remain for UK actors, as industry and Government continue to respond to Covid and manage the task of leaving the European Union. It remains critical to work collaboratively to support policies and actions that deliver resilient sustainable supply chains that work for all – from producers to consumers. It is paramount that the UK has a positive domestic context in which it can frame global collaboration and driving action.

The UK Sustainable Soya Initiative will continue to support UK industry actors and Government to achieve greater impacts and continually demonstrate progress. Next year's Annual Progress Report will demonstrate the progress made towards members' collective goal of demonstrating meaningful and demonstrable progress by 2020 and will frame the state of play of the UK's contribution to sustainable soya production in the build up to COP26.

The next annual report will be published in October 2021.

1. Introduction

In March 2018 an industry-led UK Roundtable on Sustainable Soya (UK RT) was convened by the UK Government through the Partnerships for Forest Programme, following the success of the UK Roundtable on Sourcing Sustainable Palm Oil which was created in 2012.

Industry requested the Roundtable be established due to concerns that the production of soya for UK consumption was contributing to the loss of forests and other native vegetation in landscapes in South America with impacts both on the environment, including loss of biodiversity and carbon and on local communities and human rights.

Roundtable members acknowledged soya production was not the only driver of deforestation - timber harvesting, cattle ranching, and land speculation were also significant contributors - but were mindful of the anticipated increase in global demand for soya.

Whilst Roundtable members recognised that a long-term view of what 'sustainable' soya looks like should consider a much broader range of environmental, social and economic factors beyond deforestation, the decision was taken from the outset to focus efforts on deforestation and conversion building on the momentum from industry to act in this space.

This soya Roundtable aims to facilitate the discussions of buyers and specifiers of soya in the UK and is supported by a wider UK Sustainable Soya Initiative.

1.1. The UK Roundtable on Sustainable Soya

The role of the Roundtable is to provide buyers and specifiers of soya in the UK with a platform to provide:

- a renewed impetus for action on sustainable soya – *'the need to act'*
- consensus around a framing goal and scope – *'what we want to achieve'*
- stronger and closer collaboration on the practicable steps necessary to convert the Goal into action plans within supply chains – *'what we need to do'*
- a means of tracking and communicating our progress *'how are we doing?'*

Through private-public collaboration, the Roundtable aims to support long term sustainability of agricultural industries in producing countries and a *mass market* move to secure, resilient supplies of sustainable soya to the UK and the UK livestock industry. A large focus of the UK Roundtable is on soya used in animal feed, as it is estimated that 75% of all soya imported by the UK is used as animal feed or embedded in imported meat, eggs or dairy products.¹ On a global level this estimate is higher at 90%.²

The following goal was agreed by members of the UK Roundtable on Sustainable Soya at a meeting of members on the 12th July 2018, at the full launch of the UK RT following several working group meetings:

¹ https://www.wwf.org.uk/sites/default/files/2020-07/RiskierBusiness_July2020_V7_0.pdf

² <https://www.greenpeace.org.uk/challenges/soya/>

“The UK recognises the need to accelerate progress towards a secure, resilient supply of sustainable soya to the UK.

The UK Government supports Roundtable signatories’ commitment to soya that is legal and cultivated in a way that protects against conversion of forests and valuable native vegetation.

This will be achieved by signatories committing to:

- *Publish timebound plans, by April 2019, to achieve this;*
- *Meaningful and demonstrable progress towards this Goal by 2020”*

1.2. This report

The purpose of this report is to provide an update on progress towards meeting the goal of the UK Roundtable. This is the third progress report of the UK Roundtable and sets out our current understanding of the UK soya footprint in terms of volumes, source and sustainability credentials at a national level, as well as progress made by the members of the Roundtable. This report uses the latest national data (calendar year 2019) and matrix of progress submissions collected over summer 2020.

2. How we measure progress

Members of the UK Roundtable on Sustainable Soya are asked to create public commitments that support the key principles of the Goal of the Roundtable, namely ensuring **legality and protection against the conversion of forests and valuable native vegetation for soya cultivation**. This is in line with the definitions developed by the Accountability Framework Initiative (AFi).

Soya volumes are considered legal, deforestation and conversion free in compliance with this goal through either:

- purchases of certified soya from standards that require legal compliance, prohibit legal deforestation and prohibit legal conversion of other valuable native vegetation (book and claim or mass balance models)
- a balance of soya from countries agreed by Roundtable members to be low risk of illegality, deforestation or conversion (for example, USA, Canada)

Efeca will also consider contracted purchases of soya from the Amazon in compliance with the Amazon Soy Moratorium. However, it is recognised that information on these purchases is currently only available at a trader level and not routinely passed down the supply chain.

Efeca is also aware of the development of alternative models for the verification of soya that is produced legally and free from deforestation and conversion of other valuable native vegetation, for example as part of a regional or landscape approach. Currently this is not available on the market but will be reviewed by the Roundtable, through the supply chain working group, as and when available, in full consultation with members.

2.1 Certification options

Efeca developed a certification standard briefing³ (latest edition April 2020), which reviewed certification schemes as requested by Roundtable members. The schemes named below were all found to meet principles of legality and the avoidance of deforestation and conversion of native vegetation within their criteria. While these standards do vary in scope and implementation (we would advise consulting the full briefing for more information) they all demonstrate progress against the goal of the Roundtable and can be used to support member claims. *Please note, this is not an exclusive or exhaustive list of standards that support the Roundtable goal principles.*

- ADM Responsible Soya (version 2)
- Cargill Triple S
- Cefetra Responsible Soy
- Donau Soja/Europe Soya
- ISCC+
- Proterra

³ <https://www.efeca.com/wp-content/uploads/2020/04/Certification-Standards-Briefing-2020.pdf>

- RTRS
- US Sustainability Assurance Protocol (USSAP) (note: US considered to be at low risk of illegality, deforestation or conversion)

Other criteria that were identified as important to members such as transparency were also included in the briefing, enabling members to select which schemes best suited their individual requirements beyond the goal of the Roundtable. This list is regularly reviewed and updated as requested by members and scheme owners.

2.2. Member submissions

In order to estimate the proportion of soya imported into the UK that can be claimed as deforestation and conversion free, Efeca gathered confidential data submissions from UK soya buyers and specifiers. Each member completes a 'Matrix of Progress' annually, in which they are asked to report on their progress against their commitments and provide evidence.

These member submissions are then sense checked with scheme owners, not only to include volumes not reported by Roundtable members but also to reduce the risk of double counting across the supply chain, for example reporting book and claim certificates twice at a producer and retailer level.

3. UK imports

The UK imports soya beans, meal and oil directly from producer countries and through inter-European trade. While soya oil can be used to produce biofuels, according to the UK Department for Transport only 1% came from soya sources in 2019.⁴ According to a recent WWF study, 90% of the UK's soya imports was used to manufacture products, mostly food and animal feed and so this will be the focus of this study.⁵

3.1. Soya imports

Typically, soya consumption is reported as 'soya bean meal equivalents', this is to reflect that when a soybean is crushed only a proportion of that weight is soya meal. In order to better reflect the impact of the UK's consumption of soya, the Roundtable also identifies the soybean equivalent, the volume of soybeans required to produce the meal and oil used in the UK.

The table below has been created using publicly available data from the UN Comtrade database, which allows the user to track the trade of commodities using HS codes both from producer countries to consumer countries and intra-community trade as is common across Europe.

Using UN Comtrade data, it is possible to calculate the country of origin of soya entering the UK by reallocating the volume of soya that enters via a re-exporter, such as the Netherlands. In the table below any soya from the Netherlands and Ireland has been reallocated to their sourcing countries as the volumes were deemed significant (over 50,000 metric tonnes).

2019 UK soya import sourcing data, based on UN Comtrade database

	Soybean meal equivalents (Tonnes)	Soybean equivalents (Tonnes)	Share of UK imports ⁶
Argentina	1,093,703	1,508,556	42%
Brazil	702,878	969,488	27%
N America (USA and Canada)	363,173	500,928	14%
Paraguay	202,610	279,463	8%
China	62,621	89,812	2%
Other countries	155,838	214,947	6%
Total	2,580,823	3,563,194	

The table shows that Argentina remains the UK's most significant sourcing partner, representing nearly half of all imports. Soya imported from Argentina is more likely to be traded as soya meal as opposed to whole beans and sold into the animal feed sector as 'soya of any origin' which is suitable for pigs and other livestock where the source of the soya is not critical

⁴ RTFO Biofuel data, 2019. <https://www.gov.uk/government/statistics/renewable-fuel-statistics-2019-fifth-provisional-report> Note: assuming 1000 litres equals 1 tonne, the estimated volume of soya used for biofuels would be 34,800, the source of which in 2019 was Argentina.

⁵Riskier Business, WWF. 2020. https://www.wwf.org.uk/sites/default/files/2020-07/RiskierBusiness_July2020_V7_0.pdf

⁶ Please note this is percentage share is the same for both soybean meal and soybean equivalents

for nutritional reasons. This is closely followed by Brazil, which interviews with Roundtable members has shown is where the majority of the UK's 'high protein' soya is sourced. This soya is more likely to feed into the poultry sector, which requires soya with a high protein content in order to produce large birds in small timescales.

14% of the UK's soya is sourced from North America, and this trade flow has varied since the UK Roundtable's inception, due to the changing trading arrangements between the USA and China. Whereas previously China would buy a large proportion of US soya, more recently China has been purchasing more of their soya requirements from Brazil and Europe has increased the volume of US soya as prices have decreased.

These findings are supported by a study conducted by AIC and its trader members: ADM, Cargill, Cefetra and Glencore. The study summarised the volume of soya imported by the four traders by origin as set out below. Note, there is a slight difference between the soybean meal equivalent reported above and in the trader data below (250,823 tonnes). This could be due to smaller importers bringing in very low volumes of soya or to errors in HS code recording in the publicly available data used to create the table above. Similarly, the reported percentage share for some countries is slightly different, due to the trader's ability to track more directly to source.

AIC Trader member soybean/meal origins based on 2019 import data

	Soybean meal equivalents (Metric tonnes)	Share of UK imports
Argentina	943,000	40.5%
Brazil	627,000	27%
N America (USA and Canada)	389,000	16.5%
Paraguay	371,000	16%
Total	2,330,000	100%

For a more in-depth breakdown of the sourcing of soybeans, soya meal and soya oil, please see Annex A.

3.2. Imported products containing soya: embedded soya

In addition to importing soya bean, meal and oil for consumption in the UK, each year the UK also imports products that will have soya 'embedded' within them, for example, poultry or pork which will have been reared abroad on a diet including soya and then exported for consumption in the UK market.

To calculate the volume of imported 'embedded' soya there are several conversion factors available (for information on conversion factors see Annex B), which can be used to calculate a proxy value of soya as part of the whole product. Several of these conversion factors are set out in the table below; as can be seen, there is significant variation between different sources. These differences can occur for a number of reasons, including the age and design of the study the conversion factor is based on, or differences at a country or regional level e.g. in countries

where cattle are reared predominantly on grass the reliance on soya will be much smaller. Therefore, these calculations can only provide an approximate estimate to provide guidance on the significance of embedded imports to the UK.

Average embedded soya volumes based on 2019 product imports

	Volume of imports (2019)	RTRS Soy Calculator		WWF Riskier Business report (2020)		Dutch Soy Barometer (2014)	
Chicken	419,563	317,190	0.756	241,249	0.575	251,738	0.6
Pork	447,892	227,081	0.507	117,796	0.263	147,804	0.33
Cheese	535,367	97,437	0.182	77,200	0.1442	160,610	0.3
Beef	252,799	114,012	0.451	45,504	0.18	101,120	0.4
Margarine	78,759	18,981	0.241			4,726	0.06
Eggs	78,187	41,674	0.533	24,003	0.307	2,815	0.036
Milk (per m3)	227,910	8,433	0.037	3,874.47	0.017	6,837	0.03
Soya volumes (estimate)		824,808		509,626		675,649	
Average soya volume				670,028			

Based on the range of conversion factors above, the UK indirectly imports an estimated 509,626 – 824,808 tonnes of soya in the form of meat and dairy products, or 670,028 as an average. While this is slightly higher than last year (estimated 645,472 tonnes) the increase is likely due to updates to both the RTRS Soy Calculator and the WWF Riskier Business report conversion factors, as the volume of imports has remained consistent. As expected, chicken and pork are the highest contributors to the UK's embedded soya footprint, with 41% of embedded soya and 23% respectively.

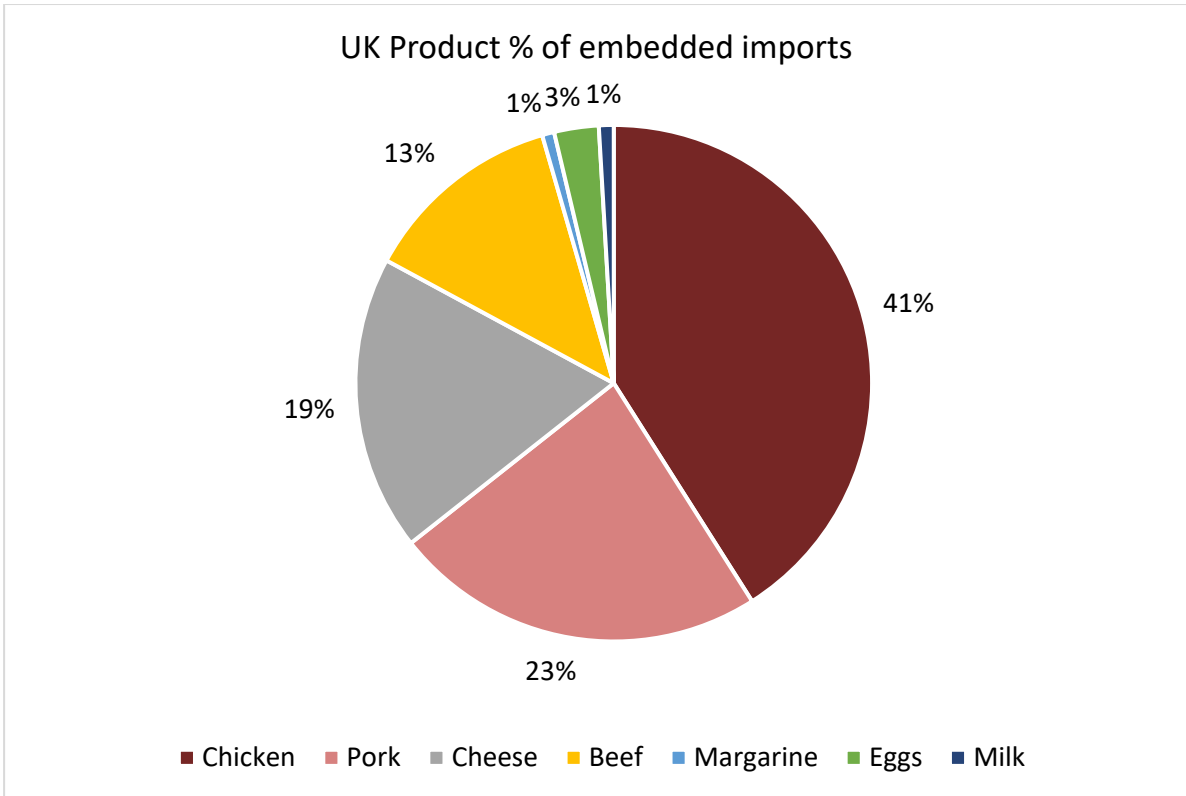


Figure 1 Breakdown of products with a proportion of embedded soya

Within the UK we know that there will be variances in soya inclusion in livestock diets across sectors depending on a number of factors including integration, raising conditions (grass fed) the degree of home-mix vs compound feed used etc. This year Efeca partnered with the Agricultural Industries Confederation (AIC) who conducted a study on the volume of soya used by each animal sector within the UK, in partnership with Agriculture and Horticulture Development Board (AHDB), to support the whole supply chain to better understand their soya usage and inform sourcing decisions. Please see Annex C for more information on this study.

3.3. Certification

Of the certification schemes reported, overall, the use of trader owned schemes and RTRS were relatively even (16% and 15% of total imports respectively) along with a smaller volume of Proterra (1%).

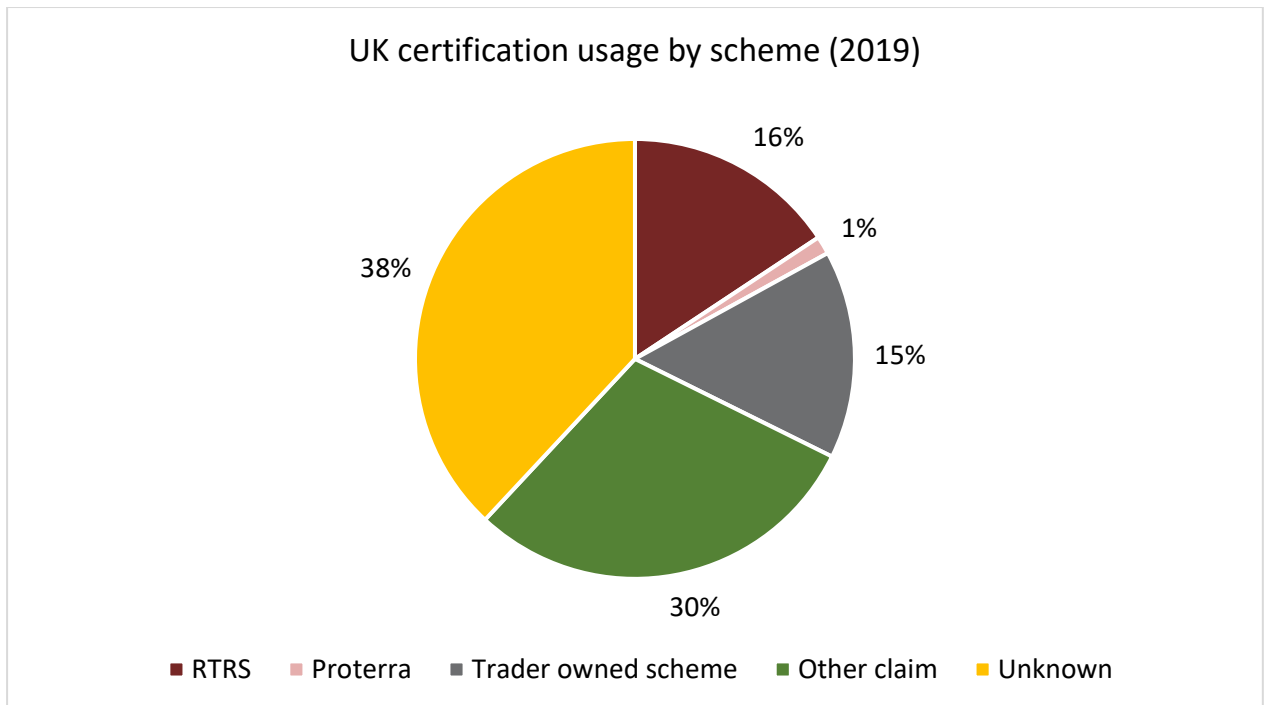


Figure 2 the UK's use of certification broken down by scheme, 2019

This is a significant change to last year's report, which showed RTRS being much more prominent (22% of all sourcing). This change is the result of the increasing interest in moving beyond book and claim models, to approaches with a greater physical link. Trader schemes made up 89% of all these physical certification claims.

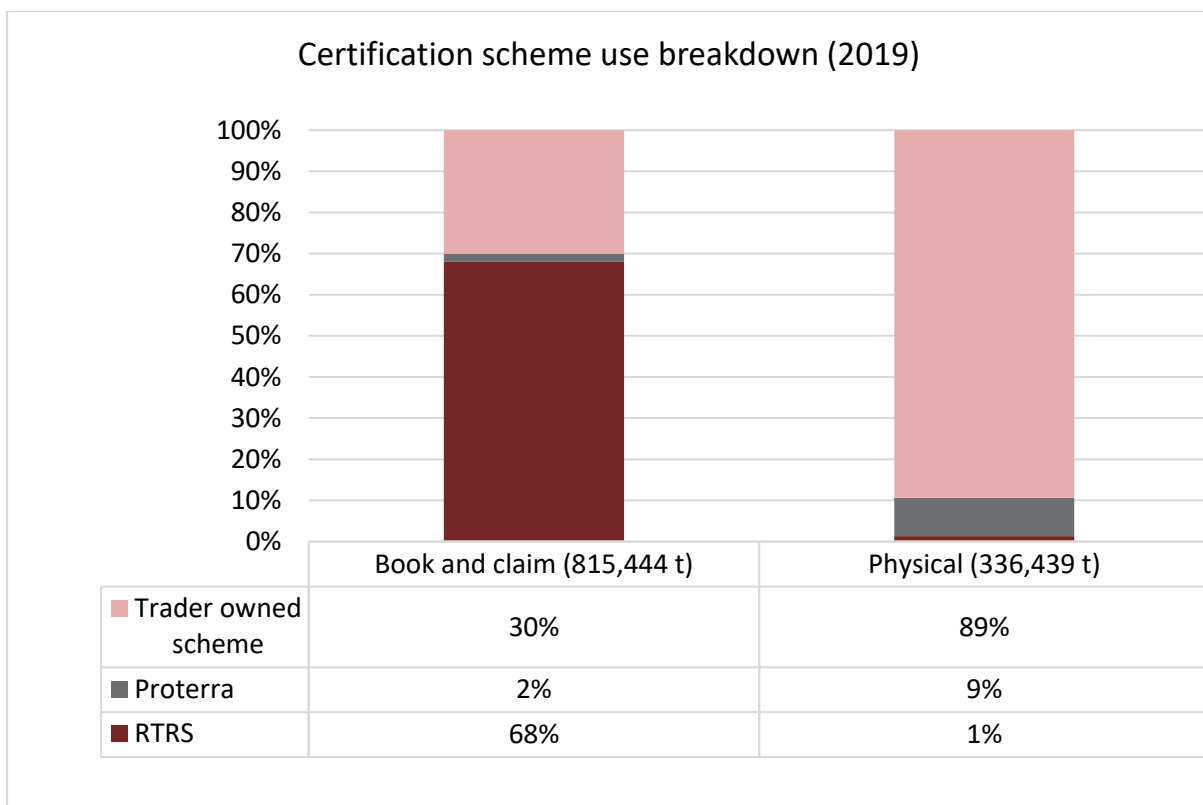


Figure 3 Breakdown of sustainable soya scheme usage by type, 2019

3.4. UK soya usage and deforestation and conversion free claim

In **soybean equivalents**, representing how many whole beans are needed to produce this volume of soya product, in 2019 the **UK imported 3.5 million tonnes of soya**, when combined with 0.67 million tonnes of embedded soya the UK's total consumption would be 4.2 million tonnes.

Based on confidential member submissions and feedback from traders and scheme owners, it is estimated that **32% of soya imported into the UK was covered by a deforestation and conversion free soya standard.**

If soya sourced from territories considered at low risk of deforestation (e.g. the USA and, Canada) and soya covered by an Amazon Soy Moratorium contract as reported by traders is included in this figure, this would increase to **62% of the UK's sourcing by volume being from sources at low risk of deforestation/conversion or covered by a deforestation and conversion free certified soya standard.**

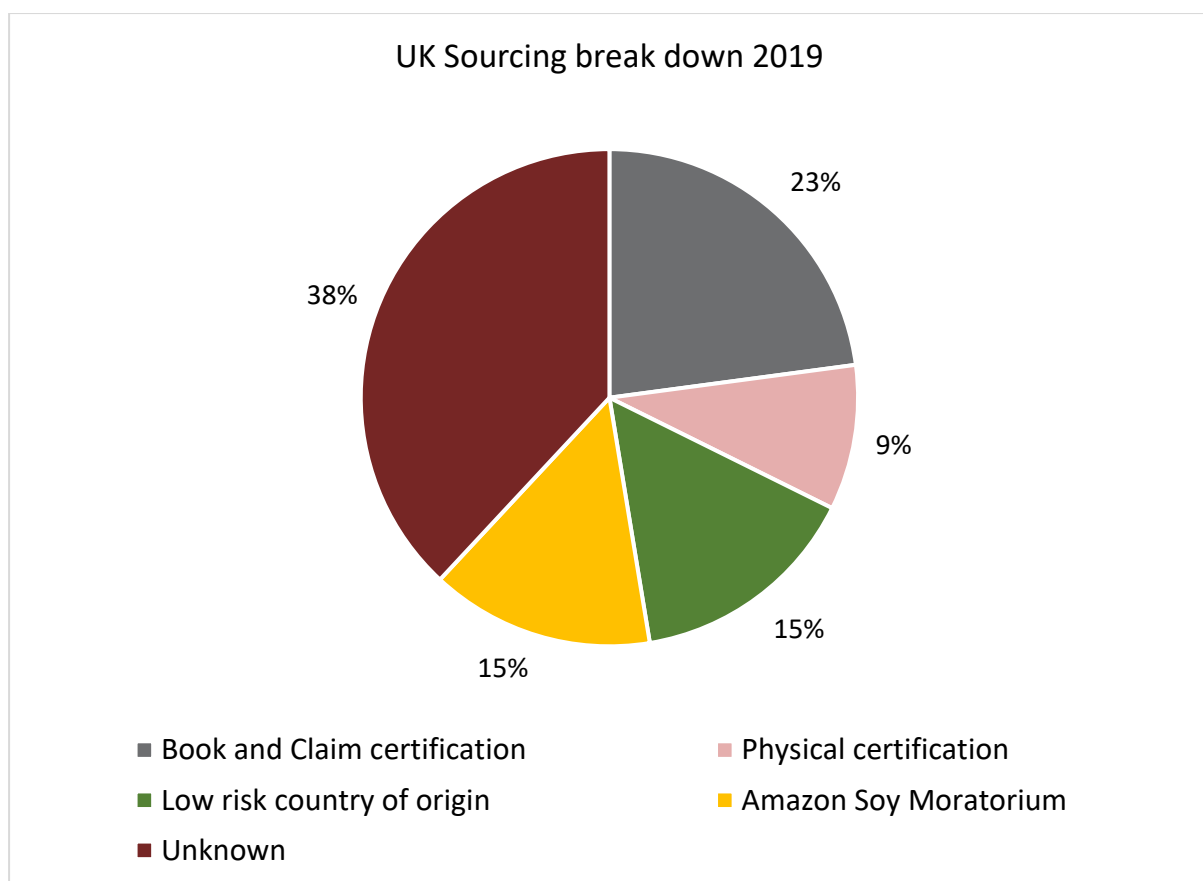


Figure 4 Breakdown of soya deforestation/conversion free status

This is a 5% increase in certified soya from last year's report, or a 17% increase since the baseline. It should be noted that the total volume of soya imports has also increased, if considering the change in volume specifically, there has been a 132% increase in certified soya volumes compared to the baseline report (2017).

4. Main findings: UK Roundtable on Sustainable Soya

Within the matrix of progress⁷, members are asked to provide an update on their progress over the year across four areas, assessment, policy, timebound plans and transparency (specifically implementation of their plans).

This year, Efeca has also split submissions by point in the supply chain, those members which are consumer facing such as retailers and food service, and ‘upstream’ members such as traders, feed producers and suppliers. Unfortunately, it was not possible to break this category into more detail without revealing commercially sensitive information. The membership will be reviewed annually and if a more granular breakdown can be provided in future reporting years this will be provided.

Of the publicly listed members of the Roundtable at the time of this publication 24⁸ or 89% completed a Matrix of Progress (MoP). Of those who did not submit, two were upstream companies and one was a recently joined new member.

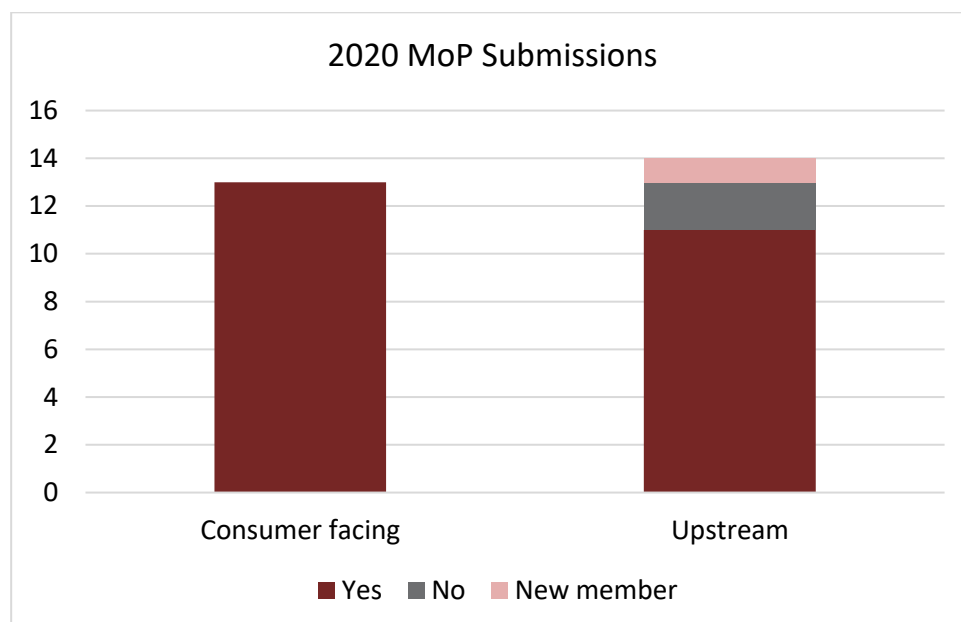


Figure 5 Breakdown of MoP submissions by sector

In the following sections, Efeca has taken the information reported in the Matrix of Progress submissions to report on member progress. Where a Matrix has not been submitted, Efeca has used knowledge gathered from publicly available sources and technical assistance delivered to provide a clear picture of progress. Where no information was available it has been assumed that the member has not met that expectation e.g. does not have a policy in place.

⁷ The matrix of progress template is available via the Efeca website.

⁸ Please note, while there are currently 29 publicly listed members of the Roundtable, WWF UK is removed as they do not buy or specify soya directly. Also, Tulip and Dalehead have merged to become Pilgrim's Pride. For the full list of members see the Efeca website: <https://www.efeca.com/sustainable-soya-initiative/>

4.1. Assessment and policy

When members join the Roundtable, they are first advised to conduct a risk and priority assessment to better understand where soya is used within their supply chain. The aim is to identify where (in which products) soya may be used, approximate volumes, an understanding of countries of origin and any existing sustainability claims or evidence that soya used is not at risk of deforestation or conversion. This information can be refined over time but helps organisations to prioritise their actions. In last year’s report it was found that all members who had completed a MoP had conducted an assessment of soya in their supply chain, and the same is true this year. New members have also reported starting this process, referring to tools like the RTRS soy calculator⁹ as being a helpful starting point.

In 2019, 19 (70%) of Roundtable members had a policy in place, a 18% increase from last year. Of those remaining, 2 had policies pending sign off, and 2 were new members (i.e. joined the UK Soya RT within 6 months) and in the process of assessing the soya volumes used in their supply chain and starting to write policies.

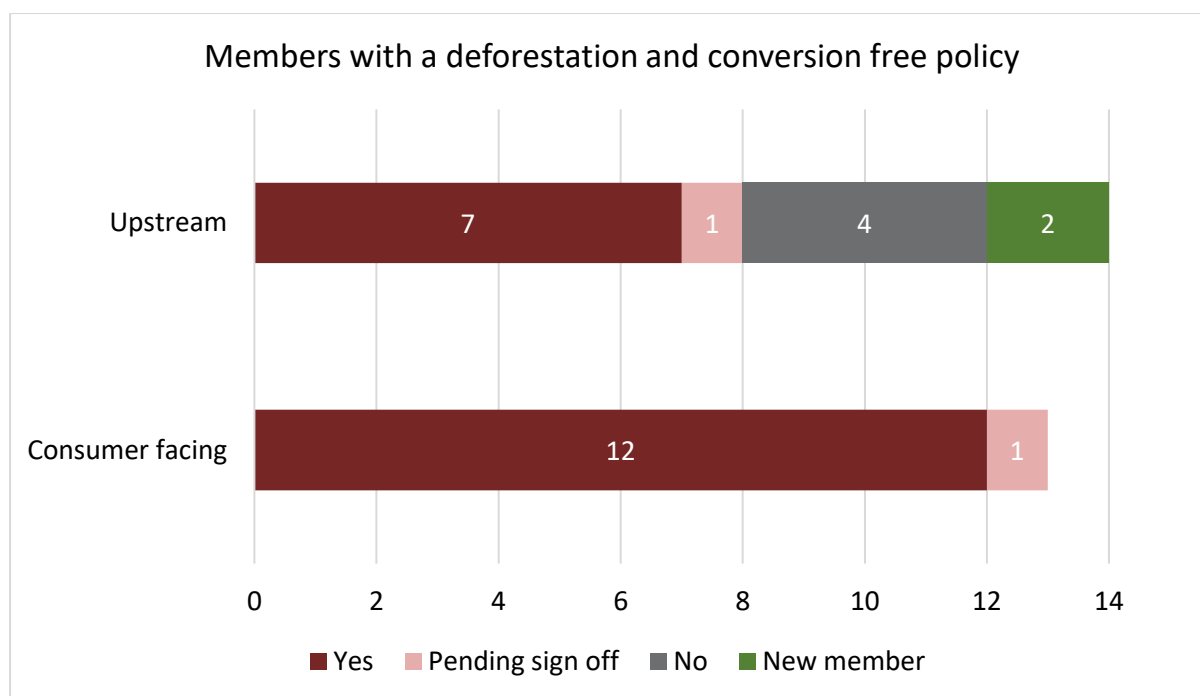


Figure 6 Breakdown of members who have a deforestation and conversion free soya policy

Of these four upstream companies who did not have a policy in place, all were buying book and claim certificates to cover some (in some cases all) their soya sourcing.

4.2. Timebound plans

This year, 59% of members had a timebound plan in place, a 10% increase on last year’s reporting, showing significant progress since the baseline report (where 23% of members had a timebound plan).

⁹ <https://responsiblesoy.org/rtrs-soy-footprint-calculator?lang=en>

Most progress has been made by consumer facing companies with eleven companies having a timebound plan in place compared to five upstream companies. The UK Roundtable has targeted support to upstream members over the past year and created stronger engagement with the food service industry to create a more consistent market message. These results show progress has been made but that there is clearly more work to be done.

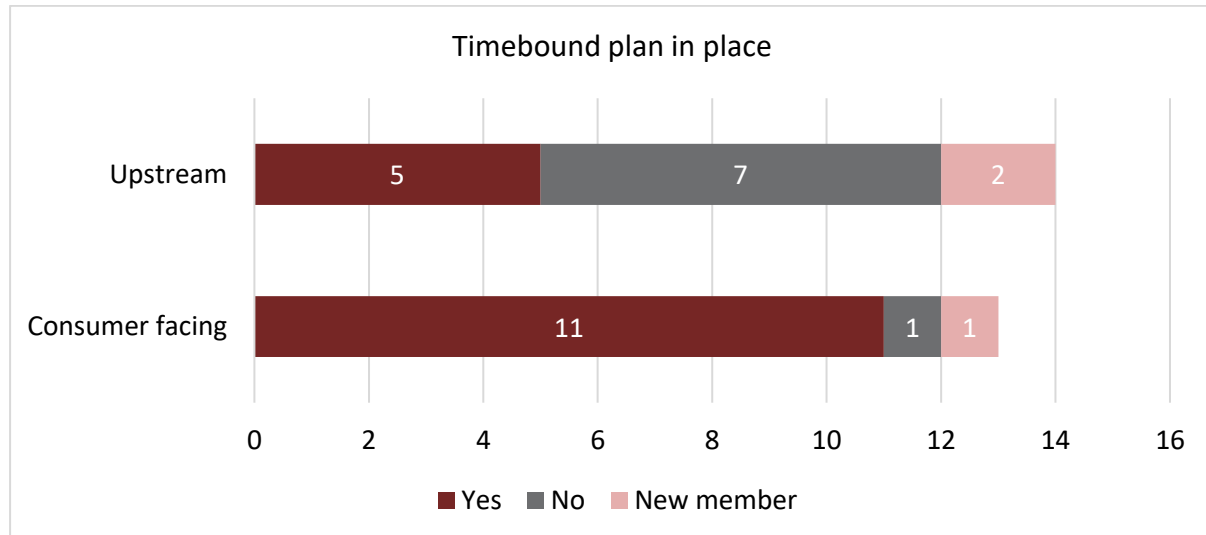


Figure 7 Breakdown of RT members with a timebound plan in place

Of those companies that have reported, most have an ambition to be sourcing 100% deforestation and conversion free soya by 2025, and within this, many of the consumer facing companies also express the ambition to achieve this through physical supply chain models, for example using mass balance or alternatives to certification such as verified sourcing areas, again by 2025. All members have supported this transition by starting with the aim of having 100% of their supply chain covered with book and claim certificates purchases by the end of 2020. Navigating a path towards physical supply chains of deforestation/conversion free soya has been the focus of the supply chain working group of the UK Sora RT this year (see section 5 below).

4.3. Implementation

Figure 8 below shows the progress members have made against their own sourcing policies between baseline (2018), and 2020 APR, in support of the goal of the UK Roundtable. For example, 2 members reported 100% compliance with their sustainable soya policy in the baseline report two years ago, compared to 8 in this year's report. In last year's report, most members reported 0-33% of their soya met their policy, therefore there has been a clear increase in the number of members who are covering 100% of their known soya usage with at least book and claim certification, as many members choose to cover their entire volume from the outset.

From the Matrix of Progress submissions, it is also possible to see that many members are using a mix of book and claim and more physical supply chains. By comparing the changes between the baseline, 2019 report and this year it is possible to track the progress of companies from an initial position of little understanding or progress against their policy towards a much greater take up of soya that is deforestation and conversion free. This year, three members have reported no progress in terms of the assessment of their total soya usage (shown as 0%

progress in Figure 8 below), as they have yet to gain an understanding of the total soya volumes in their supply chain.

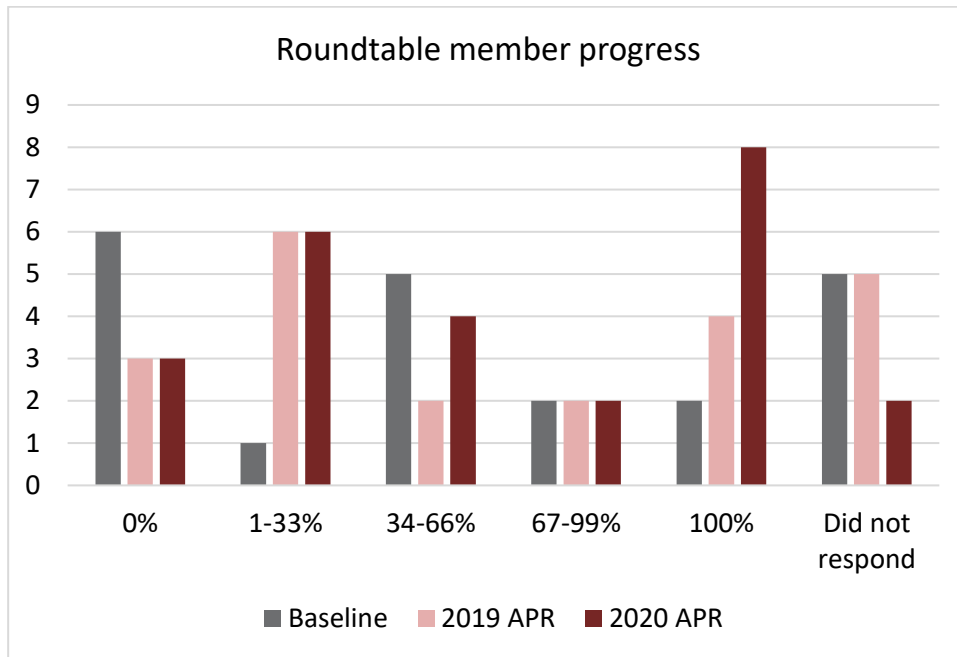


Figure 8 Breakdown of member progress towards their individual targets

Figure 9 below breaks down member progress as reported this year, based on role in the supply chain,

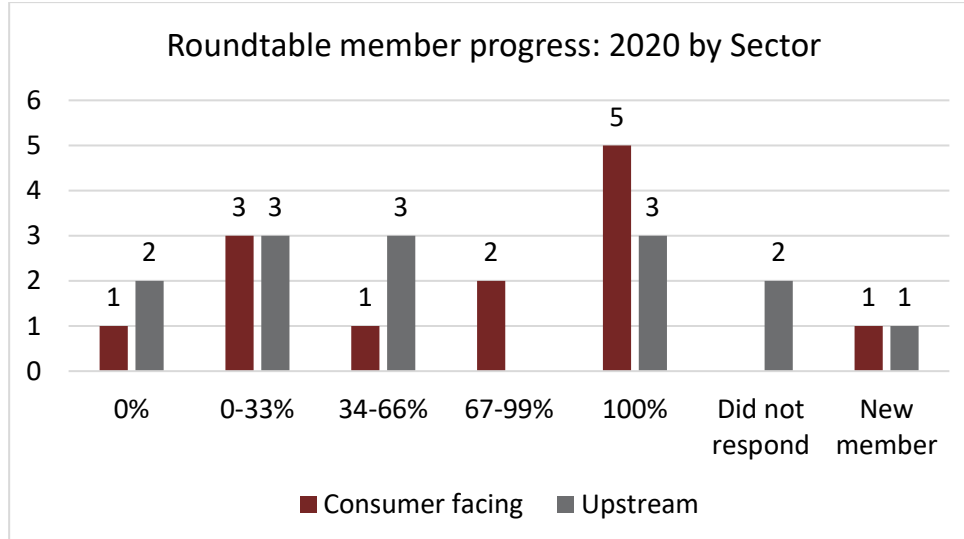


Figure 9 Breakdown of 2020 member progress by supply chain role

Many of the consumer facing company members reporting 100% compliance to their soya policies have chosen to purchase book and claim certified soya for their whole usage with a commitment to transition to physical supply chain models (e.g. mass balance) beyond this, up to 2025.

For the upstream company members there is more variation in progress. This may in part be due to the nature of the supply chain, for example contract purchasing of livestock where

companies may have limited control or knowledge of feed. Three upstream companies chose to purchase book and claim certified soya to cover their entire usage, calculated using the weight of meat and dairy products sold, and are now working to validate and refine this data for example identifying soya coming from areas at lower risk of deforestation such as the USA, or through engaging with producers in the supply chain. Other upstream actors currently only cover the volume requested by their customers, for example supporting sustainable soya policies for retail customers but not food service who may be less engaged.

4.4. Data challenges and opportunities

In July 2019, the supply chain working group was established to explore data and monitoring issues and more broadly look at ways to promote wider take up of sustainable soya in the UK and support members in a transition beyond book and claim-based compliance to physical supply chains of sustainable soya.

To support the workings of this group, AIC in collaboration with its trader members presented new data on the UK's imports of soya, including volume, country of origin and any deforestation or conversion free claims (see Annex C).

At the October 2019 Roundtable, the AIC announced plans to research the proportion of soya used by the various animal sectors with the support of their members. The findings of this study were presented to the supply chain working group in July 2020 (see Annex C).

The challenge of how best to share basic soya sourcing information: volume, country of origin and sustainability claim continues to be explored through the working group and sector plans (see below).

5. Impact of the UK Sustainable Soya Initiative

It is essential that the UK Roundtable on Sustainable Soya support the creation of meaningful impacts both in and beyond the UK. The UK Roundtable forms part of the wider UK SSI which supports engagement and outreach to both producer and consumer countries and initiatives, as well as innovative platforms and tools. Through working within this wider context, the UK hopes to support change at a broader level and thus achieve greater impact.

5.1. Supporting a mass market movement

Since the creation of the UK SSI, a key request of Roundtable members has been for the development of solutions for mass market uptake of sustainable soya. By creating a mass market movement, the UK SSI helps to create a level playing field and encourages stability of supply which lessens the risk of price fluctuations. It is also a strong market signal and call for action across the supply chain. To support this mass market movement, the following action has been taken.

Supporting UK uptake and progress

This year has seen an increase in interest in sourcing sustainable soya and the Roundtable from industry actors who had little or no prior knowledge of how soya is used within their supply chain. In order to support them the UK Sustainable Soya Initiative partnered with Proforest to produce a **beginner's guide to sustainable soya**, based on the Soy Toolkit.¹⁰ Together Efeca and Proforest produced two guides, the first a broad introduction to the importance of sourcing sustainable soya and describing where and how soya is consumed, and the second a step-by-step guide to identifying the volume of soya used in the supply chain, creating a policy, and practical implementation guidance such as how to buy book and claim certified sustainable soya. These briefings will be added to both the UK SSI's online resource page (hosted on the Efeca website) and the Soy toolkit platform.

Over the past year the Roundtable has also **partnered with UK associations** to reach out and engage with their membership on the importance of sustainable soya sourcing, including the Grain and Feed Trade Association (GAFTA), the National Farmers Union (NFU), National Pig Association (NPA) and Chilled Foods Association (CFA) amongst others, attending meetings and presenting on the topic and the role of the UK Soya Roundtable. While not all association members will feel the need to be members of the Roundtable, through these partnerships there is the opportunity for greater industry outreach and engagement to create industry wide change and to develop guidance and support that can be targeted to industry specific needs. These are also an opportunity to explore remaining challenges in sustainable soya sourcing including data sharing through feed supply chains and capturing soya usage in ingredients and derivatives.

Role of certification

In April 2020 an updated **certification standard's briefing** was released on the Efeca website. This was a revised version of the original certification briefing produced in 2018 and provided updated information on schemes already included and added several new options such as European Soya and the USSAP as requested by members. The briefing sets out how each of the

¹⁰ <https://www.soytoolkit.net/welcome>

identified schemes meets the principles of the Roundtable goal and also includes additional criteria which may be important to members for example on transparency to enable members to select schemes that most suit the needs of their business. To support this briefing Efeca also produced a secondary, supporting guide that explains the different certification options available in the soya market, from book and claim, to mass balance and segregated.

Linked to this work, the Roundtable has continued to engage with FEFAC on the update of the **FEFAC Soya Sourcing Guidelines**¹¹ (SSGs). Efeca as secretariat was invited to attend the meeting of the FEFAC Soya Drafting Group in January to provide insights into the approach taken by the UK and other European initiatives. The revised SSGs were consulted on over October 2020 with the aim of being finalised in January 2021. It is anticipated that certification schemes will then go through a revised benchmarking process to be finalised in May 2021.

The UK Soya Roundtable supply chain working group

The supply chain working group first met in August 2018, with three proposed objectives. The first was to **build consensus** and a **common understanding** of our objectives in supporting the transition to physical supply chains of sustainable soya. The second was to identify **options** for the practicable steps necessary to make this transition within UK supply chains, including understanding where the **barriers and opportunities** are. Finally, the group wished to support the communication of progress and to clearly set out **the monitoring and reporting** requirements for industry.

The membership of the supply chain working group is more heavily weighted to ‘upstream’ members of the Roundtable, supported by retail and food service companies to ensure work to meet the described aims are practical and replicable across UK industry.

The group has been pursuing activity under two main workstreams:

Workstream 1: Develop models for action to broaden the take up of sustainable soya across the wider UK animal feed industry to support a mass market transformation to legal and deforestation and conversion free soya and ensure a level playing field in the UK.

- As part of this workstream, the group has explored the potential to include sustainable soya sourcing in existing UK feed assurance requirements which could then be adopted by feed customers through FEMAS standards and have the potential to be incorporated within consumer facing labels such as Red Tractor or Lion Mark, in both instances simplifying the specification of deforestation/conversion-free soya. This work is ongoing and is in part reliant on the revision of the FEFAC Soya Sourcing guidelines described above. This could have a significant impact on UK industry, for example, 90% of pork consumed in the UK carries the Red Tractor label.

Workstream 2: Find practical ways to support the transition to physical supply chains of sustainable soya - but not with the aim of achieving a segregated supply of sustainable soya to the UK.

¹¹ https://fefac.eu/wp-content/uploads/2020/07/fefac_soy_sourcing_guidelines_en.pdf

- Within the group, targeted sector based meetings have been ongoing, beginning with the pork and poultry industry, to explore how these sectors could accelerate the transition to sourcing sustainable soya. These sectors were chosen primarily for their significant use of soya, but also due to the different challenges these supply chains present, for example within the pork sector solutions are required that enable not only the very large companies but also the many thousands of independent pork producers to practically and economically include sustainable sourcing requirements in their feed specifications.

In addition to these two workstreams the supply chain working group tasked themselves with identifying other actions (alongside or in addition to certification) that UK RT members could take to support sustainable production of soya. At the request of the group, the four main traders of soya to the UK provided data on the volume of soya imported by the UK, the country of origin and any deforestation or conversion free claims for 2019. **The study found that of the proportion of imported soya which carried no deforestation or sustainability claim, 88% (approximately 900,000 mt) was of Argentinian origin, with smaller volumes from Paraguay and Brazil (11% and 2% respectively).** This information combined with the UK Roundtable's previous work with Trase to identify key sourcing municipalities in Brazil provides the opportunity to prioritise and support key producer landscapes linked to the UK supply chains.

5.2. UK Government engagement

In March 2020 the Global Resource Initiative (GRI) Recommendations Report,^{12, 13} was published. This was the Report of a Taskforce of leaders from business, finance and civil society convened by Government as part of the 25-year Environment Plan between August 2019 and March 2020 to propose additional actions the UK needs to take to develop sustainable supply chains of forest-risk commodities and provide a model for global leadership.

In response to one of the recommendations from the Taskforce, the Department for Environment, Food and Rural Affairs (Defra) has recently undertaken a consultation process for a proposed law requiring users of forest risk commodities (including soya) to conduct due diligence to ensure these commodities were produced in accordance with laws in the countries where they are produced. Similar proposals for a due diligence obligation on forest risk commodities are in the process of development within the EU currently.

Defra were invited to present this consultation directly to Roundtable members, to answer questions ahead of their feeding into the consultation.

5.3. Supporting a global transition

Over the past year, the UK SSI has attended meetings of French, Danish and Swedish sustainable soya initiatives providing lessons and learnings from the UK experience.

¹² <https://www.gov.uk/government/publications/global-resource-initiative-taskforce>

¹³ <https://www.efeca.com/uk-global-resource-initiative-gri/>

It was encouraging to see continued progress from the Danish Soy initiative that was launched at the end of 2018 with support from and largely mirroring the UK Soya Roundtable approach. The Danish Agriculture & Food Council recently announced a commitment to responsibly produced, verified and deforestation-free soya by 2025 with annual timebound progress milestones¹⁴. This is an important step forward both in terms of building demand for sustainable soya across Europe and in terms of providing a level playing for the pork industry and customers in the UK. Through the **Amsterdam Declaration Partnership**, the UK SSI has led the development of a **joint statement of support** for sustainable soya¹⁵. In conjunction with other European national initiatives, including Denmark, the Netherlands, France, Germany, Sweden, Norway and Austria. This statement published on the Amsterdam Declaration website sets out the national initiatives shared commitment to deforestation and conversion free soya and sets out several activities through which national initiatives can collaborate to achieve the goal. Activities include shared methodologies for monitoring and reporting, engagement with producers and feeding into existing European dialogues and processes.

Together with IDH, this group of national initiatives is looking to formalise working arrangements and support, in order to become a central point of contact for those who wish to engage with European soya buyers, and to better coordinate outreach to other key buyer markets such as China.

The UK Roundtable has also been invited to engage with producer countries, most notably taking part in a dialogue with the **Brazilian Embassy** at the invitation of the Ambassador of Brazil to the United Kingdom. This meeting of Agri-Sustainability talks was the first of what is hoped to be an ongoing meeting, to discuss sustainability within agricultural production, from the perspectives of producers, consumers and regulators.

By continuing to engage globally, the UK SSI intends to strengthen the market signal for resilient supplies of sustainable soya, replicate the success of other markets and encourage consumers yet to act to start through supportive dialogue and information exchange.

¹⁴ <https://agricultureandfood.dk/danish-agriculture-and-food/responsible-soy-production>

¹⁵ https://ad-partnership.org/wp-content/uploads/2020/05/European-National-Soya-Initiatives-Statement_FINAL.pdf

6. Conclusion

In 2019 the **UK imported 3.5 million tonnes of soybean equivalents** representing the volume of whole soybeans required to produce the total quantity of soya imported by the UK.

When combined with the volume of embedded soya imported into the UK the total consumption amounts to around 4.2 million tonnes soybean equivalent. The majority of this, approximately 75%, is used within animal feed, meat, dairy and eggs.

Based on confidential member submissions and feedback from traders and scheme owners, it is estimated that **32% of soya imported into the UK in 2019 was covered by a deforestation and conversion free certified soya standard**. Whilst this represents only a small (5%) increase compared to 2018, within this we have seen a sharp increase in the uptake of physical certification (2% to 7%) moving beyond book and claim-based policy compliance. If soya sourced from territories considered at low risk of deforestation (North America and Canada) and soya covered by an Amazon Soy Moratorium contract is added to this figure, **the total proportion of soya imported into the UK in 2019 from sources at low risk of deforestation/conversion or covered by a deforestation and conversion free certified soya standard amounts to 62%**.

We have also seen encouraging year on year progress from the Roundtable's industry members. This year 70% of Roundtable members had a policy in place, a 20% increase from last year. Of those upstream companies who did not have a policy in place, all were buying book and claim certificates to cover some (in some cases all) their soya sourcing. There has also been a small increase in the creation of timebound plans, 10% since last year but 36% since the baseline. Members have demonstrated significant progress in implementing their policies with many reporting 100% compliance with their policy commitments to purchase book and claims certified soya covering their entire volumes by the end of 2020.

The UK's approach continues to act as an example to other national initiatives across Europe, with lessons being shared with the French, Danish and Swedish national initiatives. The ongoing discussion and progress being made through such exchanges led to the development and publication of a pan-European Joint Sustainable Soya Declaration in 2019 and the creation of a formalised platform for European national initiatives to work together to build a consistent European market message.

The UK Sustainable Soya Initiative will continue to support UK industry actors and Government to achieve greater impacts and continually demonstrate progress.

The next annual report will be published in October 2021.

Annex A Soybean, meal and oil imports

Soya meal imports

	Quantity (tonnes) 2018	Share of UK imports (vol) % 2018	Quantity (tonnes) 2019	Share of UK imports (vol) % 2019	Year on Year (YoY) volume change%	% of UK imports YoY change
Argentina	1,145,475	57%	1,024,104	48%	-11%	-9%
Netherlands	303,603	15%	342,811	16%	13%	1%
Brazil	59,104	3%	255,020	12%	331%	9%
Paraguay	212,996	11%	194,734	9%	-9%	-2%
Ireland	73,581	4%	105,217	5%	43%	1%
China	59,835	3%	52,047	2%	-13%	-1%
USA	59,735	3%	34,470	2%	-42%	-1%
Other countries	91,439	5%	118,047	6%	29%	1%
Total	2,005,768		2,126,450		6%	

Soybean imports

	Quantity (tonnes) 2018	Share of UK imports (vol) % 2018	Quantity (tonnes) 2019	Share of UK imports (vol) % 2019	Year on Year (YoY) volume change%	% of UK imports YoY change
Brazil	449,867	55%	356,120	55%	-21%	0%
USA	326,739	40%	171,598	27%	-47%	-13%
Canada	7,076	1%	83,854	13%	1085%	12%
Ireland	8,243	1%	9,434	1%	14%	0%
Belgium	14,121	2%	7,298	1%	-48%	-1%
China	4,030	0%	5,855	1%	45%	-1%
Other countries	1,267	0%	9,294	1%	634%	-1%
Total	812,249		643,456		-21%	

Soya Oil

	Quantity (tonnes) 2018	Share of UK imports (vol) % 2018	Quantity (tonnes) 2019	Share of UK imports (vol) % 2019	Year on Year (YoY) volume change%	% of UK imports YoY change
Netherlands	144,155	74%	138,699	74%	-4%	0%
France	15,380	8%	11,413	6%	-26%	-2%
Russia	8,179	4%	10,044	5%	23%	1%
Spain	11,594	6%	8,957	5%	-23%	-1%
Belgium	5,550	3%	5,221	3%	-6%	0%
Ireland	4,701	2%	5,134	3%	9%	1%
Norway	2,015	1%	4,056	2%	101%	1%
Germany	1,574	1%	1,777	1%	13%	0%
Other countries	1,811	1%	2,073	1%	14%	0%
Total	194,959		187,374		-4%	

The soya beans imported into the UK are crushed, and the resulting meal typically used in animal feed. Over the past two years (the entire reporting time of the UK Roundtable) there have been ongoing trade negotiations between the USA and China which have dramatically influenced the global market. Typically, China would purchase a large volume of soybeans from the US, but over the past two years China has purchased from South America, making USA grown soybeans more appealing to the European market due to falling prices. However, this usual market status quo is returning, and as a result the UK's purchases of US soya is decreasing. While the UK continues to source most soybeans from Brazil, there has been an increase in soya purchased from Canada.

The volume of soya meal the UK imports has remained relatively consistent, while there has been a significant year on year change in the volume of soya being sourced from Brazil (9% increase in proportion of UK imports) it is still a relatively small volume compared to what is being sourced from Argentina.

Annex B Soya consumption methodology

This section will explain the methodology used to calculate the estimated amount of soya imported by the UK, in order to identify changes to UK sourcing and the progress of members towards meeting the goal of the UK Roundtable on Sustainable Soya.

The highly complex nature of soya supply chains and end 'uses' means that it can be challenging to accurately capture data on all products containing soya. For this reason, this report will be split into two parts, the first being a UK country level figure and the second a more specific analysis on the activity and progress of Roundtable members.

The national level reporting focuses on soya beans, meal and oil imported into the UK, coming from both producer countries and inter-European trade. Where possible, additional data has been provided on imports likely to contain soya (such as meat products) from which a proportional soya value can be attributed. It should be noted that this will vary across supply chains and will be an estimated figure.

1.1. Data sources

Total volumes of UK imports of soya have been gathered using the International Trade Centre (ITC) Trade Map tool, which uses UN COMTRADE data to provide import/export information based on HS codes. Efeca has worked with the Agricultural Industries Confederation (AIC) which is the trade association and individual traders to ensure this data accurately reflects UK sourcing. Efeca has also consulted with a wider network of partners while producing this report including Trase and the Agricultural and Horticultural Development Board (AHDB).

The International Trade Centre (ITC) is an online service of a suite of tools, funded by the World Bank and the European Commission. It was developed to support global trading decisions, improve transparency and facilitate access to markets. The tools available include maps for trade, market access, investment, trade competitiveness and standards. For the purpose of this study, Efeca has used the Trade Map tool, and its associated datasets.

The Agricultural Industries Confederation (AIC) is the UK trade association for several sections of the agri-supply industry including 90% of UK animal feed, and 90% of UK grain and oilseeds. The association has over 250 members and represents £6.5 billion turnover at farmgate. The AIC supports collaboration throughout the food chain to support modern commercial agriculture in the UK.

The Agriculture and Horticulture Development Board (AHDB) is funded by farmers, growers and others in the supply chain via a levy and is independent of both commercial industry and government. The aim of the AHDB is to support British farming to be resilient and competitive on the global market, accelerate innovation and support industry in understanding the needs of consumers. As a result, AHDB undertakes a range of work including extensive research and development programmes, providing market information and undertaking marketing exercises both in the UK and export markets. The membership of AHDB is formed of six main agricultural areas, pork, dairy, beef and lamb, horticulture, cereals and oilseeds and finally potatoes. Poultry is not a focus of AHDB, but as AHDB has a working partnership with Defra some information related to poultry is included in its publicly available database.

The ITC trade map can provide more detailed breakdowns of soya (e.g. whole beans, meal, oil) and trade by country within Europe. Once the soya has entered the UK market, this figure can be verified with AIC’s member data. Defra’s own import data can also be used via AHDB’s data portal, to explore the volume of soya used in compound feed.

1.2. Indirect soya imports

Some soya consumed in the UK may be imported ‘indirectly’ for example, meat from an animal reared in another country and sold into the UK market.

To calculate the volume of soya associated with these products, proxy calculations can be used to provide a reasonably accurate estimate of the volume of soya that has been used to produce the volume of chicken, pork etc. sold to the UK. Proxy figures vary across different sets of research, and so Efeca has chosen to present a range of figures across a number of sources: RTRS¹⁶ (an independent 3rd party certification scheme), the Dutch Soy Barometer¹⁷ and WWF’s Riskier Business report.^{18,19} Please note that since last year’s progress report both the WWF Risky Business report and the RTRS soy calculator underwent revision, and so the revised conversion factors are used this year.

These conversion factors are intended to provide a proxy calculation for the proportion of soya in a product. For example, according to the WWF Risky Business report, 58% of the weight of a chicken product can be attributed to the volume of soya consumed.

Table A: Common conversion factors applied to soya (kg of soya per tonne of product).

	RTRS Conversion factor	WWF Riskier Business report (2020) conversion factors	Dutch Soy Barometer (2014) conversion factors
Chicken	0.756	0.575	0.6
Pork	0.507	0.263	0.33
Cheese	0.182	0.1442	0.3
Beef	0.451	0.18	0.4
Margarine	0.241		0.06
Eggs (per unit)	0.533	0.307	0.036

¹⁶ <https://responsiblesoy.org/rtrs-soy-footprint-calculator?lang=en>

¹⁷ http://www.bothends.org/uploaded_files/document/Soy_Barometer2014_ENG.pdf

¹⁸ https://www.wwf.org.uk/sites/default/files/2020-07/RiskierBusiness_July2020_V7_0.pdf

¹⁹ Please note, that the Risky Business report has used proxies based on a mid-range estimate from a range of sources.

Milk (per m3)	0.037	0.017	0.03
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1.3. Measuring Progress of Roundtable members

In the preparation of this report, information has been gathered from members using a questionnaire style document called the 'Matrix of Progress'.

The Matrix of Progress is divided into four key areas which enable members to highlight changes and progress made over the course of a year, but also act as a 'pathway' of steps towards the Roundtable Goal. The areas covered are:

- Assessment
- Policy
- Timebound plans
- Transparency

The information from individual member responses has been aggregated to enable Efeca to report on the collective position of members (to ensure individual members' commercially sensitive data is not revealed). To avoid double counting of soya volumes, reporting is measured against progress over time, rather than by supply volumes.

While some members are direct buyers and specifiers of soya, others are associations representing buyers and specifiers. For associations, rather than completing the matrix of progress, it was asked that they provide a short statement of their commitment and recent activity to communicate the goal of the Roundtable to their members. Finally, it should also be noted that for the purposes of this report, only publicly declared members of the Roundtable have been reported on. Other organisations that are currently working through the process of declaring their commitment to the Roundtable goal are not included in the findings of this report.

1.4. Assumptions

Due to the complexity of the supply chain, and data currently available, several assumptions have been made.

As well as using publicly available data, some individual Roundtable members have kindly provided data in confidence to support findings at a UK level. We have accepted this information without significant verification.

The total figure of imported soya meal reported varies between the various organisations reporting on soya trading, due to differing methods of data collection, the time of year reporting takes place, and choice of HS codes. For this reason, this report favours ITC data, as HS codes can be selected by the user and any assumptions or corrections made to the data is clearly identified.

Where data has either been unavailable, or too complex to analyse at this time, proxy figures have been used to calculate estimates of soya usage. This is seen in the section regarding embedded soya in products such as compound feed and finished goods.

A rapid analysis of exports showed that exports of soybean, oil and meal were relatively small, and therefore it is assumed that soya imports are consumed in the UK.

Annex C AIC and Trader data

Upon request of the Roundtable, the four main traders to the UK: ADM, Cargill, Cefetra and Glencore through their membership of AIC provided data on the UK's imports of soya, provided in soybean meal equivalents. As this data relates just to these four traders, the figures differ slightly to the publicly available national data outlined above.



On behalf of the UK Roundtable membership, thank you to AIC and the traders for providing this information.

1.1 Trader soybean/meal origins based on 2019 import data

UK SOYA IMPORTS – Based on 2019 import data		Metric tonnes	%
1.	Total UK soybean meal imports (Note 1)	2,330,661	100%
2.	UK soybean meal imported from territories carrying no risk of deforestation (Note 2)	389,000	16.7%
3.	UK soybean meal imported compliant with FEFAC schemes carrying zero deforestation standard and not included under row 2 (Note 3)	558,000	23.9%
4.	UK soybean meal imported compliant with ASM contracts and not included under row 3 (Note 4)	375,187	16.1%
5.	Balance of UK soybean meal imports where no sourcing scheme has been requested (Note 5) Balance made up of following origins: Argentina – 888,474, Paraguay – 100,000, Brazil – 20,000	1,008,474	43.3%
6.	Balance of UK soybean meal imports under row 5 which are considered to carry a low risk of deforestation – FEFAC Methodology (Note 6)	871,820	37.4%
7.	UK soybean meal imports carrying a risk of deforestation	136,654	5.9%

SOYBEAN/MEAL ORIGINS – Based on 2019 import data	Metric tonnes	%
Argentina	943,000	40.5%
Brazil	627,000	27%
N America (United States and Canada)	389,000	16.5%
Paraguay	371,000	16%
TOTAL	2,330,000	100%

Note 1 – Where beans are supplied to the UK market, the soybean meal equivalent is used to express import volumes – calculated at 72.5% yield.

Note 2 – Where beans or meal are supplied to the UK market from territories with no deforestation risk (US, Canada).

Note 3 – Where beans or meal are supplied to the UK market from territories where there is a deforestation risk but where deforestation risk is mitigated by sourcing from schemes compliant with FEFAC Soy Sourcing Guidelines which carry zero deforestation standards according to EFCA benchmark study:

- RTRS
- Proterra
- ISCC+
- Cefetra Responsible Soy (CRS)
- Cargill ‘Triple S’
- ADM Responsible Soybean Standard version 2 (note version 1 would be placed in current FEFAC)
- Donau Soja/European Soya (would qualify under Note 2)
- 2BS
- The US Sustainability Assurance Protocol (would qualify under Note 2)

Note 4 - Where beans or meal are supplied to the UK market under Amazon Soy Moratorium contracts.

Note 5 – Where beans or meal are supplied to the UK market where no request for any sourcing scheme has been made. The supply of soya to the UK is a direct function of market demand.

Note 6 – Where beans or meal are supplied to the UK market from territories where deforestation is a risk. The risk is calculated using a methodology developed by FEFAC in conjunction with CIARA and ABIOVE and weights the risks as follows: Brazil (Cerrado) – 50% (SCF considers the contribution of soy in deforestation to be significantly lower than the FEFAC estimate), Argentina (Gran Chaco) – 3%, Paraguay – 100%. The Paraguayan figure is unknown due to insufficient data, hence the precautionary approach. More information has been sought from Paraguayan partners in order to arrive at a representative figure.

Disclaimer

AIC have exercised due and customary care in preparing this report. No warranty, express or implied, is made in relation to the contents of this report.

1.2 Summary of Soybean Meal usage in animal feed in the UK – 2018-2019

Introduction

Discussions held within AIC Committees and in wider fora such as the UK Roundtable on Sustainable Soya had brought into question the accuracy of previously published estimates of the soya bean meal inclusion levels in livestock diets.

Methodology

AIC offered to consult with industry professionals who contribute to the AIC Legal Affairs and Scientific Committee and Feed Material Supply Committee to produce soybean meal inclusion levels for the range of diets that are listed in the Animal Compound Feed Survey conducted by

AHDB on a monthly basis. Input was also received from members of the AIC Fish Feed Committee.

The information received was passed on to AHDB who then calculated average inclusion levels per diet category and matched these figures with the compound feed manufacturing data collected for the period July 2018 – June 2019. DAERA data for the same period has also been included.

AHDB data is not collected for fish feed diets so AIC consulted with their Fish Feed Committee to supply annual UK production data for the same period.

AHDB collect data on poultry feed production from large flock units (IPU survey) and this feed production data has been added, using the same averaged SBM inclusion levels as for the poultry compound feed diets.

The data supplied for cattle diets and for poultry diets has been split in order to give separate soya usage figures for dairy production, for beef and calves, for poultry meat and for eggs.

Disclaimer

AIC have prepared this report to provide an indication of soybean meal use in UK livestock diets. AIC have exercised due and customary care in preparing the report but has not verified the information provided by those companies and individuals that have contributed to this report. The lack of available data from the home-mix sector and some data gaps with integrated producers suggests a considerable margin for error should be taken into account for these estimates (+/- at least 50,000t)

No other warranty, express or implied, is made in relation to the contents of this report.

Average SBM (or equivalent) inclusion levels per diet category*

Diet Category	% SBM
Total Calf Feed	2.5
Compounds for Dairy Cows	3.0
Blends for Dairy Cows	16.2
All Other Cattle Blends	3.3
Cattle Protein Concentrates	12.8
Total Cattle and Calf Feed	
Pig Starters and Creep Feed	19.5
Link/Early Grower Feed	21.0
Pig Growing Feed	15.8
Pig Finishing Feed	5.0
Pig Breeding Feed	9.5
Pig Protein Concentrates	44.5
Total Pig Feed	
Chick Rearing Feed	15.2
Layer Feed	11.2
Broiler Chicken Feed	21.8
Poultry Breeding and Rearing Feed	9.3
Turkey Feed	21.8
All Other Poultry Feed	19.3
Poultry Protein Concentrates	60.0
Total Poultry Feed	
Compounds for Breeding Sheep	3.0
Blends for Breeding Sheep	3.8
Compounds for Growing and Finishing Sheep	1.5
Blends for Growing and Finishing Sheep	3.8
Sheep Protein Concentrates	12.5
Total Sheep Feed	
Horse Feed	3.0
Fish Feed	13.4
Other	10.4

*Data provided by AIC Legal Affairs and Scientific Committee, Feed Material Supply Committee and Fish Feed Committee.

Data Summary

Species	Annual feed production (mt)	SBM usage (mt)
Cattle (dairy)	3,235,200	235,600
Cattle (beef and calf)	1,179,400	45,500
Pigs	2,112,000	208,700
Poultry (meat)	5,374,860	1,113,800
Poultry (eggs)	1,875,540	209,500
Sheep	858,000	20,600
Equine	173,400	5,200
Fish	352,000	47,200
Other	493,900	51,400
TOTAL	15,654,300	1,937,500

Comments

The data gathered reports a total of 1,937,500 tonnes of SBM incorporated into animal feed in the UK during the period July 2018 – June 2019. Recently collected data (AIC) identifies that in 2019, 2,330,661 tonnes were available for inclusion in livestock diets. It is necessary to consider the whereabouts of this 'missing' 0.4m tonnes and, in discussion with industry experts, provide the following explanations:

- The AHDB IPU survey gathers data on feed volumes produced for integrated poultry producers. These are large-scale poultry farming systems running their own feed mills. The AHDB survey may not pick up all of the IPU capacity in the UK as the completion of returns is voluntary. We estimate there may be 100,000t SBM under-reported here.
- Integrated pig production in the UK is an additional sector for which no feed production data is gathered. The AHDB IPU survey covers only poultry production. We estimate that there may be 100,000t SBM under-reported here.

- AHDB and DAERA data does not report all raw material use or feed production by home mixers. These are farmers who buy straights or blends for direct mixing on farm. Attempts have been made in the past to estimate the size of these market sectors with volumes of SBM being used in home-mix dairy, beef and sheep, pig and poultry diets. We estimate that there may be 250,000t SBM under-reported here with the following species split:

Dairy	125,000t
Beef and sheep	25,000t
Pig	50,000t
Poultry	50,000t
Total home -mix	250,000t

The addition of the above estimates brings the total reported usage of SBM in animal feed to 2.4m tonnes.
