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Proposal for UK Roundtable on Sustainable Soya

Proposal
Prepared for the UK Roundtable on Sustainable Soya
July 2018

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Executive summary

The expansion of soya production has been a significant driver in the loss of forest and other native vegetation in South America, with consequent impacts on bio-diversity, carbon emissions, water systems and local communities. In addition to soya, timber harvesting, cattle ranching and land speculation are also significant contributors to forest loss.

In the UK, a significant number of companies have already committed to eliminating deforestation associated with soya through a range of initiatives including the Statement of Support for the Cerrado Manifesto and the Consumer Goods Forum ‘zero-net deforestation’ commitment. The UK is a signatory to the New York Declaration on Forests and the Amsterdam Declaration; through the DFID funded Partnerships for Forests (P4F) Programme the UK government is committed to supporting the private sector to transition to sustainable supply chains for agricultural commodities, ensuring a level playing field and driving up standards globally. On behalf of DFID and BEIS, Efeca has been engaged through P4F to support buyers and specifiers of soya in the UK to establish a UK Roundtable on Sustainable Soya.

Approximately 90% of soya consumed in the EU is used in livestock feed. Soya is imported into the UK directly as soya bean, meal or oil and indirectly within finished products (e.g. imported meat products from animals fed on a diet including soya). Imports have grown steadily from an estimated 2.7 million tonnes in 2011 to 3.1 million tonnes of soya bean equivalents in 2017. It is estimated that approximately 20-30% of UK soya meal consumed in the UK in 2017 was purchased to a certified or verified standard (meeting the benchmark of the FEFAC Soya Sourcing Guidelines) with a ‘sustainable’ or ‘responsible’ claim.

Concerns about the impacts of soya production have largely been focused on links to deforestation in South America. In developing this initiative, a much broader range of environmental, social and economic factors have been considered that might better describe a long-term view of what ‘sustainable’ soya looks like; whilst these wider issues are important, there is a danger, in setting a very wide scope, that clarity of purpose and impetus for action is lost. For this reason, the proposal for the UK Roundtable on Sustainable Soya, is to focus at the outset on the deforestation/conversion agenda, particularly within the priority landscapes of the Cerrado, Gran Chaco, Atlantic Forest and Amazon, and in terms of usage within the UK, animal feed and livestock sector.

The following Goal has been developed:

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 to achieve this by April 2019;
- meaningful and demonstrable progress towards this Goal by 2020.

The drafting of the Goal has been carefully considered and consulted. The intention is to support the full implementation of legal frameworks in producing countries, essential as a foundation for long term sustainability, but recognise that the law, even when fully applied, will not protect

all forests or valuable native vegetation. For this reason, members are asked to commit to the avoidance of legal conversion of forests and valuable native vegetation. The timelines have been chosen to reflect, in the case of April 2019, a desire to inject greater urgency into the process of converting shared objectives into action and in the case of 2020, the significance of this date for existing industry and Government commitments.

In joining the Roundtable, the UK supply chain can send a clear market signal through a shared public goal, but we recognise we won't achieve our objective without achieving change on the ground, in producing countries. To be impactful for the longer term, industry action plans will need to recognise and respond to the challenges faced by producers, drawing on the support and experience of partners and wider participants already working in South America, alongside the support of government.

Through the collaborative efforts of the private and public sector the UK 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

Introduction

The expansion of soya production has been a significant driver in the loss of forest and other native vegetation in South America, with consequent impacts on biodiversity, carbon emissions, water systems and local communities. In addition to soya, cattle ranching and land speculation are also significant contributors to forest loss. At a global level, it is estimated that deforestation and forest degradation represent between 10 to 20% of global anthropogenic CO₂ emissions; this includes forest loss but also below ground carbon (the so called ‘upside down forests’) such as in the Brazilian Cerrado.

Considerable efforts have been made to halt deforestation, through global-leading environmental legislation such as the Forest Code in Brazil, to the industry-led Amazon Soy Moratorium that since 2006 has dramatically reduced forest loss in the Amazon Biome. Demand-side initiatives in other European countries, notably the Netherlands, have already successfully shown the potential for action when supply chains work together to give a clear market signal. The UK Roundtable on Sustainable Soya aims to build upon this work.

In the UK, a significant number of companies have already committed to eliminating deforestation associated with soya through a range of initiatives including the Statement of Support for the Cerrado Manifesto, Consumer Goods Forum ‘zero-net deforestation’ commitments, New York Declaration and others. These companies are now seeking to accelerate the implementation of these commitments with the support of government.

The UK is a signatory to the New York Declaration on Forests and the Amsterdam Declarations. Through the Partnerships for Forests (P4F) Programme¹ the UK government is committed to supporting the private sector to transition to sustainable supply chains for agricultural commodities, ensuring a level playing field and driving up standards globally. P4F’s programmes have recently been extended to Latin America, to soya producing countries. The government’s ambitions have been further articulated in the recently published 25-Year Environment Plan, ‘A Green Future’ and support the UN Sustainable Development Goals.

Soya is imported into the UK directly as soya bean, meal or oil and indirectly within finished products (e.g. imported meat products from animals fed on a diet including soya). Imports have grown steadily from an estimated 2.7 million tonnes in 2011 to 3.1 million tonnes of soya bean equivalents in 2017.² The bulk of directly imported soya is used within animal feed, the high protein content of soya beans from South America being particularly important for the poultry and pork industry but also for the dairy, beef and aquaculture sectors.

On behalf of DFID and BEIS, Efeca has been engaged through the Partnerships for Forests Programme to support buyers and specifiers of soya in the UK to establish an industry-led UK Roundtable on Sustainable Soya.

¹ <https://partnershipsforforests.com/>

² WWF & RSPB, Risky Business, 2017 <https://www.wwf.org.uk/sites/default/files/2017-10/Risky%20Business%20-%20October%202017.pdf>

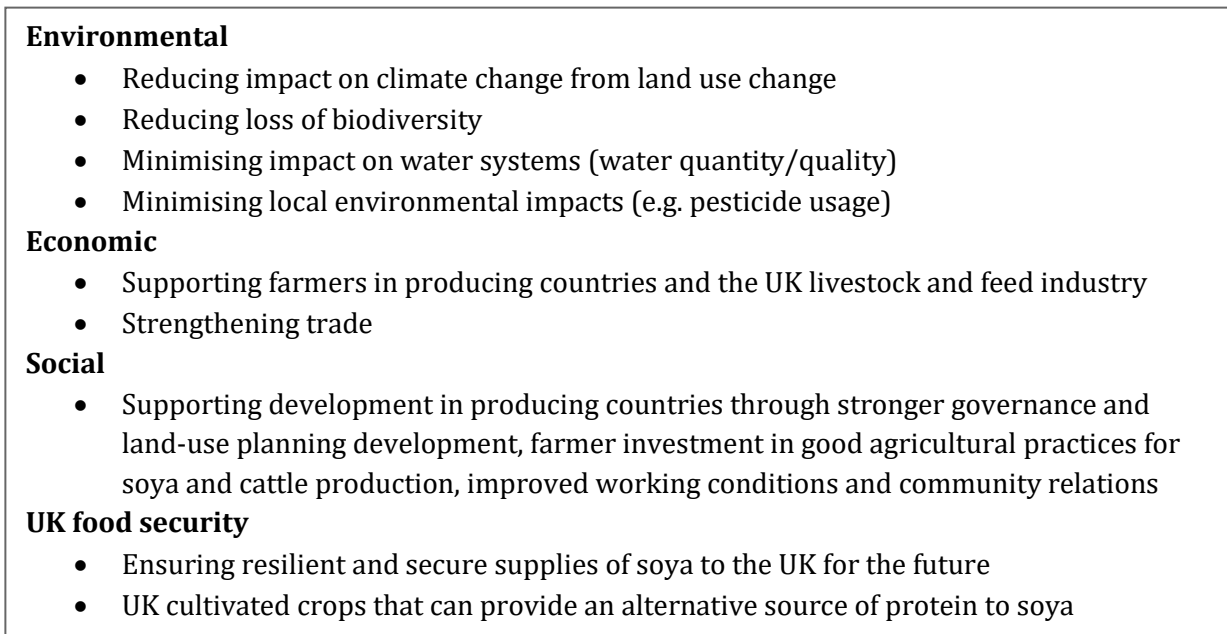
The role of the Roundtable is to provide:

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

Through this collaboration of the private and public sector the UK Roundtable on Sustainable Soya 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.

Developing our Goal

Current concerns about the impacts of soya production have largely been focused on links to deforestation in South America, described in relation to biomes (e.g. the Cerrado) and/or countries (e.g. Brazil). In developing this initiative, a much broader range of environmental, social and economic factors have been considered that might better describe a long-term view of what 'sustainable' soya looks like, see below:



If we consider these to be issues relating to the sustainable *production* of soya, there is a parallel and connected emerging sustainable *consumption* debate which is looking to understand the relative roles and impacts of plant versus meat diets in meeting the protein needs of growing global populations. This is relevant to soya because the demand for soya is in large part driven by increasing meat consumption. These 'layers' of soya sustainability are represented in the diagram below:

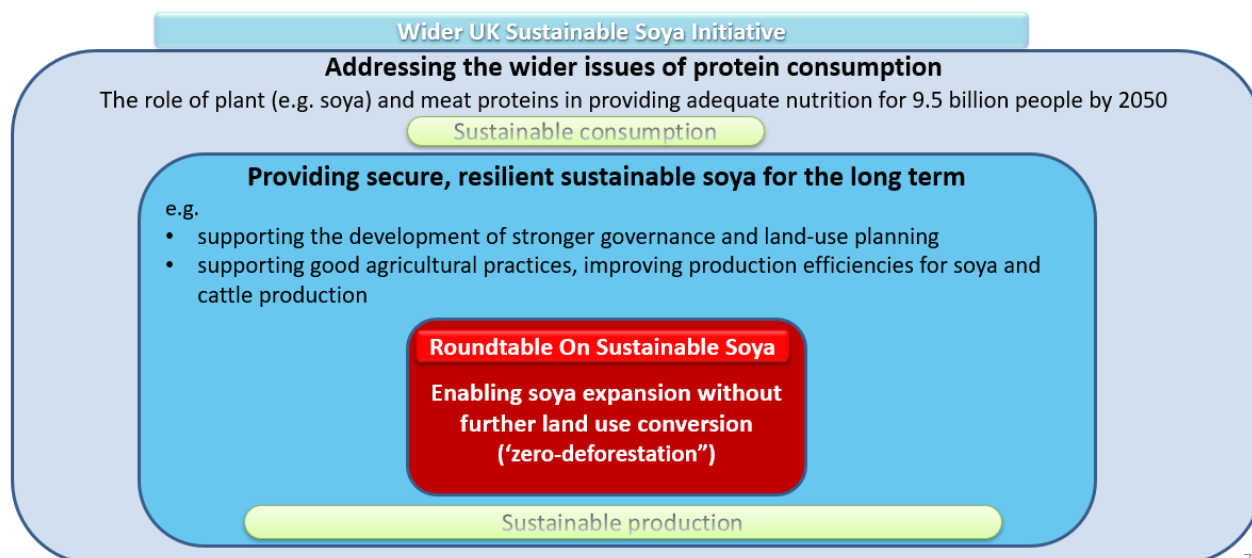


Figure 1 The 'layers' of soya sustainability

These wider issues are critical to the development of a longer-term approach to sustainable soya but there is a danger, in setting a very wide scope, that clarity of purpose and impetus for action is lost.

For the purposes of the UK Roundtable on Sustainable Soya it is proposed to adopt the following scope:

- To focus at the outset on the deforestation/conversion agenda, as this presents the most urgent case for action. There is space within the wider UK Sustainable Soya Initiative to look at a wider set of activities that may be needed to embed sustainability in the longer term and look to explore the wider debate on 'sustainable consumption'. This will be driven by Roundtable members.
- To prioritise action to address land use conversion within the priority landscapes of the Cerrado, Gran Chaco, Atlantic Forest and Amazon.
- In terms of soya usage, to prioritise our efforts around animal feed (as the largest consumer of UK imported soya) including poultry, pork dairy and eggs, beef and farmed fish but include within the scope soya used directly as an ingredient (e.g. soya milk and by-products such as lecithin) to ensure a level playing field and support best practice. Soya in finished goods (UK manufactured or imported) are in scope although we recognise the soya footprint of these products may be more difficult to map.

We recognise it is neither possible nor desirable to separate environmental and social impacts of soya cultivation within our work on soya. Most initiatives including certification and other standards already include criteria on both. So, whilst we have set our focus on the avoidance of further deforestation and conversion we expect the supply chain initiatives developing out of the UK Roundtable will address both; we will be looking to collate examples of work 'beyond deforestation' as part of our annual monitoring and reporting programme.

Finally, in relation to scope, the UK Roundtable on Sustainable Soya is:

- Technology 'neutral'. Soya should be responsibly sourced irrespective of GM status. GM/Non-GM will remain the remit of individual member companies outside of this Initiative
- Not seeking to promote a move away from soya produced in South America

The proposed Goal

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 to achieve this by April 2019;
- meaningful and demonstrable progress towards this Goal by 2020.

The Goal has been developed to recognise the following key issues:

- **Legality** within soya production remains a challenge but is important as a foundation for longer term sustainability
- **Native vegetation**: Landscape protection should extend beyond forests to other valuable **native vegetation** such as the savannah of the Cerrado
- **Beyond legality**: Even when fully complied with, the law will not protect all forests or valuable native vegetation. The Roundtable Goal asks members to commit to the avoidance of legal deforestation/conversion of valuable native vegetation.
- **Definitions**: A single definition of 'sustainable' or 'responsible' soya is not yet agreed but we can (and should) make progress whilst continuing to drive for greater agreement on definitions

In relation to the timebound milestones:

- **2020**: remains a significant milestone for industry and Government and should be recognised within the Goal. 100% compliance by this date is unlikely to be achievable for all actors in the supply chain but there is an expectation of 'meaningful' and 'demonstrable' progress by 2020.
 - **Meaningful progress**: a policy in place and good progress made towards the UK Roundtable Goal for your priority soya volumes in line with your timebound plan.
 - **Demonstrable progress**: in line with the Matrix of Progress, a publicly available report of progress made up to 2020
- **April 2019**: reflecting the need to inject urgency into converting shared objectives into action through the creation and transparent sharing of timebound plans. The forum of the Roundtable and supporting activities presents the opportunity to work collaboratively to achieve this. An example of how the Goal could be converted into action and monitored through the Matrix of progress is shown below (see Table 1 below).

Goal	Example action	Matrix of progress criteria
<i>Soya from a legal source</i>	Specify your soya meets a responsible soya scheme in line with FEAC soya Sourcing Guidelines	Does your soya policy include a commitment to legal requirements and supporting frameworks in soya producing countries?
<i>Soya cultivated in a way that protects against conversion of forests</i>	Specify your soya meets a responsible soya scheme that excludes legal deforestation and is compliant with the Amazon soya Moratorium <i>Future options: jurisdictional scheme, GTCerrado, CFA Protocol</i>	Does your soya policy include a commitment to forest protection that goes beyond the avoidance of illegal deforestation?
<i>Soya cultivated in a way that protects against conversion of valuable native vegetation.</i>	Specify your soya meets a responsible soya scheme that includes the protection of native vegetation <i>Future options: GTCerrado, jurisdictional scheme, CFA Protocol</i>	Does your soya policy include a commitment to go beyond the protection of forest landscapes to the protection of other valuable native vegetation?

Table 1 An example of how the Goal could be converted into action and monitored through the Matrix of progress

Summary of baseline initial findings

The UK imports soya beans, meal and oil directly from producer countries and through inter-trade within Europe. Approximately 90% of soya consumed in the EU is used in livestock feed³, predominantly in the form of soya meal.

In 2017, the UK imported 756,750 tonnes of soya beans from Brazil (70%), the USA (23%) and Canada (4%). The UK has one soybean crushing facility where the beans are crushed, and the resulting meal used in animal feed.

The majority of soya is imported into the UK as soya meal, approximately 2 million tonnes a year, from the following countries:

Top exporters (2017)	Share in UK imports (vol) %	Quantity (tonnes)
Total		1, 918, 388
Argentina	63%	1, 213, 827
Netherlands	15%	295, 843
Paraguay	10%	184, 831
Ireland	4%	78, 985
China	2%	44, 620
Brazil	1%	33, 172

³ WWF & RSPB, Risky Business, 2017 <https://www.wwf.org.uk/sites/default/files/2017-10/Risky%20Business%20-%20October%202017.pdf>

While most of the UK's soya comes directly from producer countries, 15% is sourced via the Netherlands. This is unsurprising given the role of the Netherlands in European trade generally, and when exploring this further the Netherlands import the majority (93%) of its soya directly from South American producers, see Fig 2 below:

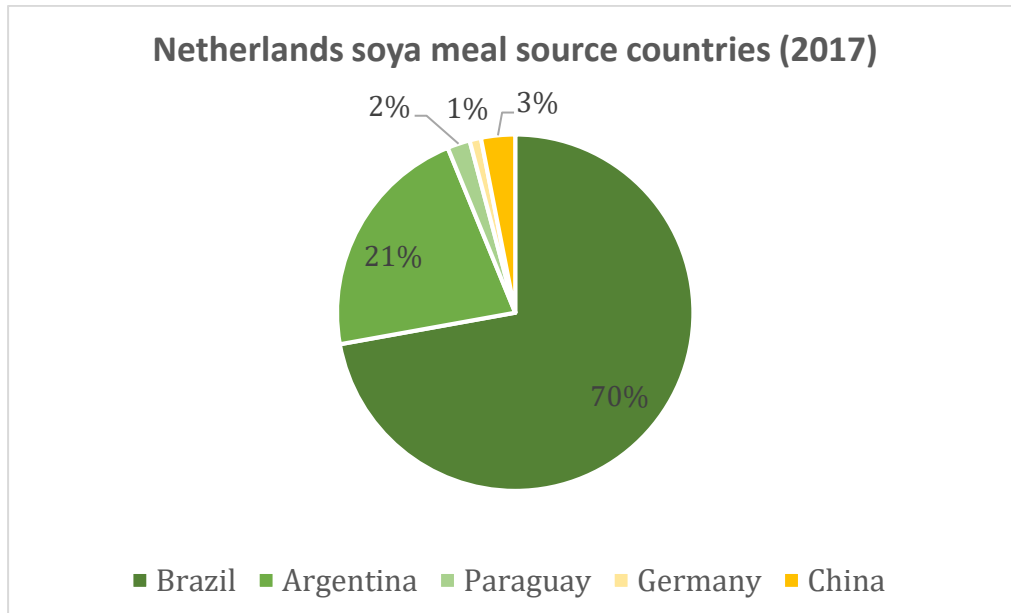


Figure 2 Top sources of soya meal for the Netherlands

As well as 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 reared abroad on a diet including soya and then sold to the UK. The UK imports an estimated 0.8 million tonnes of soya in the form of meat and dairy products, the majority of which is 'embedded' within imported chicken (45%) and pork (20%) see Fig 3 below.

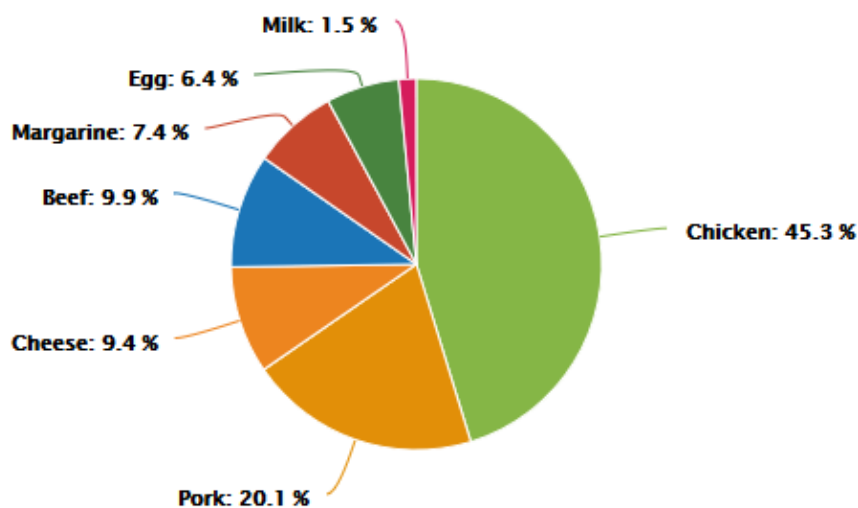


Figure 3 Breakdown of imported embedded soya by product⁴

⁴ Calculated by Efeca using UN COMTRADE data and the proxy calculations of RTRS

In total the UK annually imports approximately **3.1 million tonnes**⁵ of soya bean equivalents directly in the form of soya beans and meal, with at least an additional **0.8 million tonnes** of soya imported indirectly 'embedded' in product. The UK also imports a very small volume of soya oil, but as this is less than 150,000 tonnes this has not been the focus of this study.

Typically, soya consumption is reported as 'soya bean equivalents', this is because when a bean is crushed, 80% forms the meal and 20% the oil.

To convert the volume of soya meal into soya bean equivalents, you must therefore account for the oil that was also part of the original soya bean. In the case of the UK:

1,918,399 (soya meal) / 0.8 =	2,397,999
756,750 (soya beans) =	756,750
Total	3,154,749

Mapping the impact of the UK Soya Footprint

According to research by the USDA, Brazil and Argentina produce on average 3 tonnes of soya per hectare of land⁶. For the UK's direct annual footprint of approximately 3.1 million tonnes of soya this therefore equates to a land footprint of just over 1 million hectares.

Several tools are in development that provide traceability of global soy trade flows that can in turn be linked to indicators of impact in producing countries. TRASE is one example, developed to help governments, companies and investors understand their exposure by linking exported commodities with countries and production areas, overlaying agricultural, environmental and social risk criteria. The tool currently supports data for four countries (Brazil, Paraguay, Argentina and Indonesia) across three commodities (soya, beef and palm oil) but is undergoing continual updates and developments. Soya data is currently available at a national level in Argentina for the year 2016, at sub-national level in Paraguay and at municipality level for Brazil.

Global Forest Watch (GFW) is an online platform that provides data and tools for monitoring forests, supporting companies, government and other stakeholders to improve forest management

Our aim will be to continue work with TRASE, Global Forest Watch and other partners towards a set of 'impact' indicators against which to measure & report on the impacts in producing countries from the actions of the UK Roundtable on Sustainable Soya.

⁵ When a soya bean is crushed, 80% becomes meal and 20% becomes oil. Therefore a 'soya bean equivalent' figure is given to account for the oil and meal produced.

⁶ <https://www.fas.usda.gov/commodities/soybeans>

Sustainability 'status' of UK imported soya

To calculate the volume of 'sustainable' soya imported by the UK, Efeca worked with traders and the feed sector to gather data. According to this data, in 2017 approximately 20-30% of UK soya meal consumed in the UK was purchased to a certified or verified standard (meeting the benchmark of the FEFAC Soya Sourcing Guidelines) with a 'sustainable' or 'responsible' claim. Of this volume, it is estimated that more than half is linked to a trader scheme, with the remaining being linked to Proterra or RTRS, see Fig 4 below. It should be noted that a study of four UK retailers' use of soya in 2016 showed a much higher proportion (60%).⁷ This continues to be a work in progress; we will look to verify these figures before the baseline report is released in August.

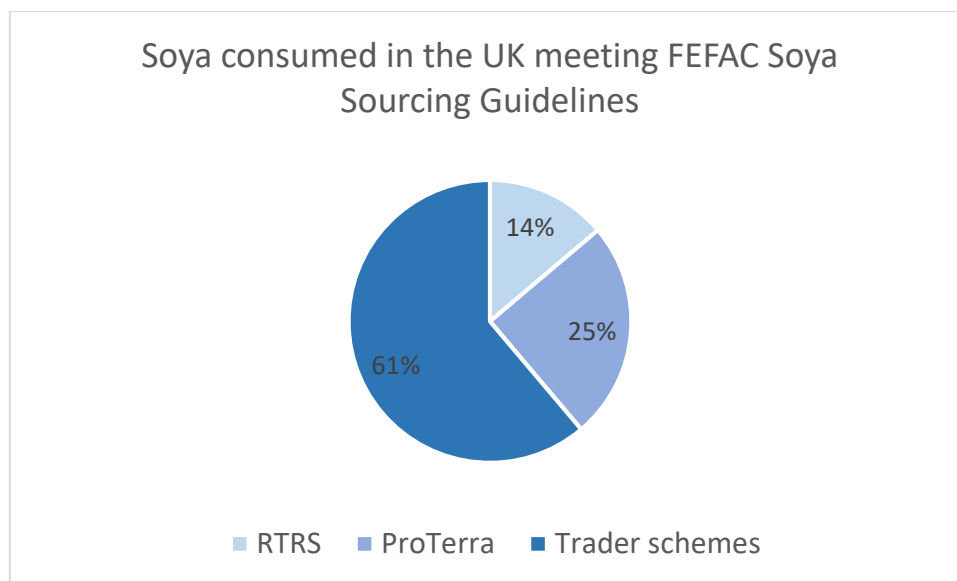


Figure 4 Breakdown of FEFAC compliant soya consumed in the UK

Most of the certified/verified soya is currently purchased through 'credits'.

Consumption

As stated above, 90% of Europe's soya usage is in animal feed.

Within the UK, the Agricultural and Horticultural Development Board (AHDB) with the support of Defra gathers information on the volume of soya imported into the UK and how compound feed use is split across sectors.

Feed production is split into the following proportions by volume (tonne) - see Figure 5 below:

⁷ Soy reporting initiative, March 2017. KPMG and IDH, <https://www.idhsustainabletrade.com/uploaded/2017/06/Soy-reporting-initiative-Final-IDH-Report-May-2017.pdf>

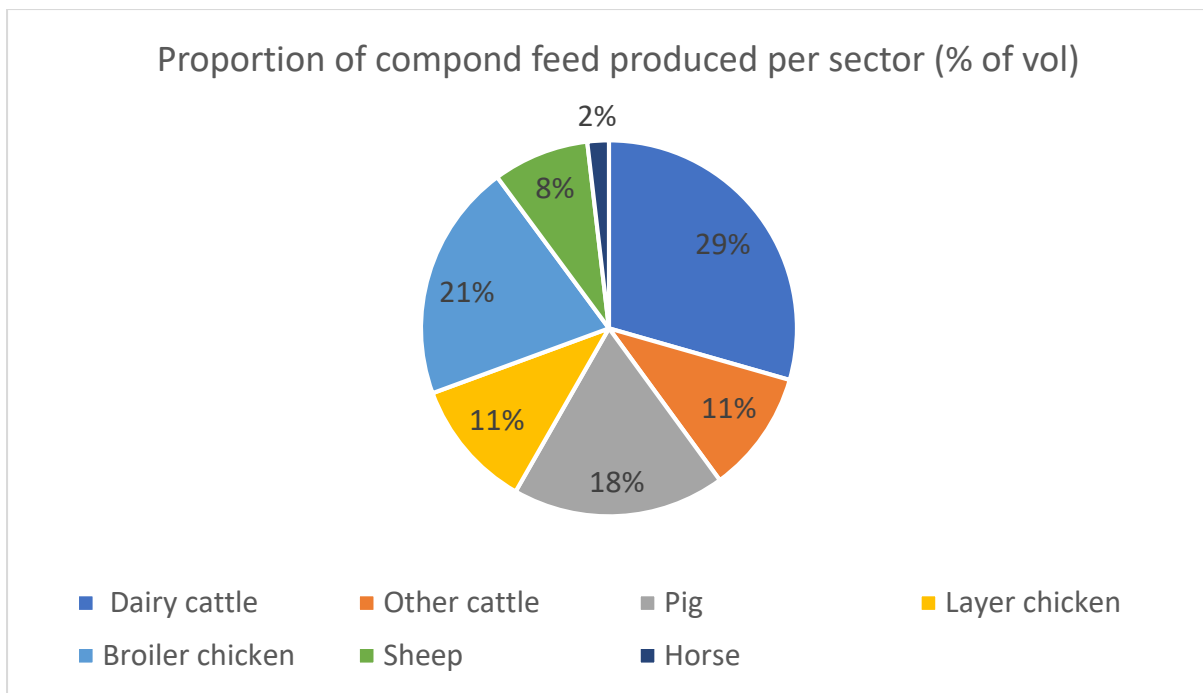


Figure 5 Proportion of compound feed production by sector

While the graph shows the dairy cattle sector has the highest consumption of compound feed, the proportion of soya within feed for each sector will vary. According to the latest compound feed data from Defra (2017) soya typically makes up approximately 9.3% of compound feed but we know that some sectors will use a higher proportion than others.

Calculation of soya consumption by sector is complicated further as farmers and producers in the UK will also use a 'home mix', which is where the farmer buys ingredients for feed directly (including soya) to create their own blends, as opposed to buying a compound 'pre-made' feed.

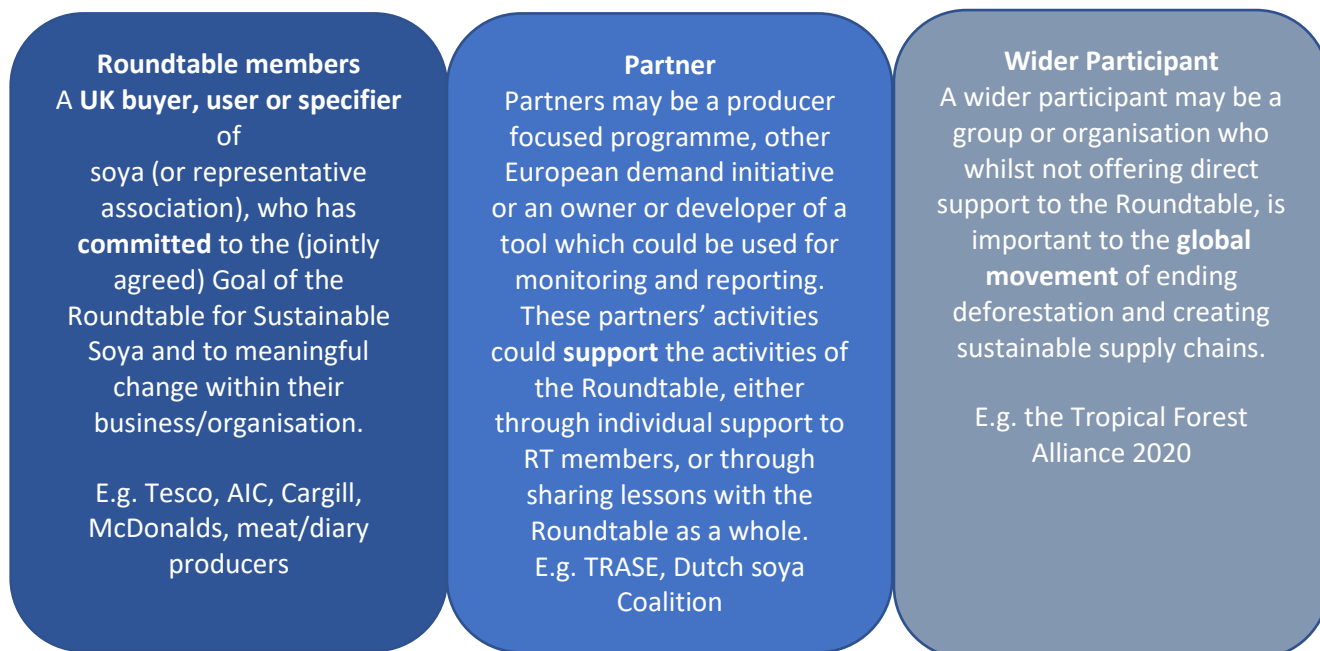
For these reasons, we are currently not able to accurately breakdown the split of soya usage across different sectors, however previous research suggests the largest volume of soya consumption is within the poultry and pork sectors.

Conclusion

Whilst the UK's current uptake of sustainable soya is low, this clearly presents an opportunity to accelerate progress significantly (given the market share represented by members of the Roundtable) and to support progress across existing and developing initiatives in Europe and beyond, in particular China. For more information on how the Roundtable is exploring potential alignment with other demand and supply side soya initiatives, see the next section.

Alignment with other demand and supply side soya initiatives

The core Roundtable membership will be made up of UK buyers and specifiers of soya (and representatives of associations), however, to succeed Roundtable members will need the support of a wide range of partners and wider participants defined below:



To this end, Efeca has begun to engage with both demand and supply side initiatives, to see where we may learn lessons and potentially align our thinking.

We recognise we won't achieve our objective without achieving change 'on the ground', in producing countries. In joining the Roundtable, the UK supply chain can send a clear market signal through a shared public goal, but this is only a first step; this needs then to be converted into timebound practical action plans within supply chains and to be impactful in the longer term these plans will need to recognise and respond to the challenges faced by producers, drawing on the support and experience of partners and wider participants already working in South America, alongside the support of government.

Efeca has already begun to engage with many of these organisations around their existing and developing programmes with producers, including UNDP (Good Growth Partnership/Green Commodities Programme, IDH's jurisdictional work in Mato Grosso in partnership with the local state government's "Produce, Conserve and Include" (PCI) strategy, the Collaboration for Forests and Agriculture, the work of the GT Cerrado, National Wildlife Federation, Nature Conservancy, Tropical Forest Alliance, BV Rio's 'Responsible Commodities Facility' and others.

The Partnerships for Forests programme which funds Efeca's demand-side work (such as facilitating the UK Roundtable on Sustainable Soy) also funds supplier focused programmes and the scope of these programmes has recently been extended into Latin America. This presents a further opportunity to work more closely with local in-country teams focusing on supply-side activities and enabling us to build stronger partnerships.

There has been significant interest in the UK Roundtable on Sustainable Soya from other demand side initiatives, both those already established and those in a similar 'start-up' stage of development. Efeca has engaged with a number of these including two well established initiatives in the Netherlands and Sweden both of which have already made considerable progress against public commitments, a soya working group more recently formed in Denmark under the Danish Ethical Trading Initiative and the on-going work of the China Sustainable Soy Trade Platform. The work in China, led by Solidaridad, represents a significant opportunity to work towards a truly mass-market transformation of soya supply chains globally.

Efeca has also been liaising closely with the feed sector trade bodies of AIC and FEFAC and with the leading certification schemes RTRS, ProTerra and ISCC.

This outreach work is an essential element of the Roundtable. It provides Members with updates and developments on soya as they build their own plans, supports greater alignment and convergence in the market signal for sustainable soya and helps to provide a platform for engagement on collaborative activities outside of individual supply chains whether on opportunities for joint advocacy, the development of supporting tools and other technology or discussions on wider soya issues beyond deforestation.

Monitoring and reporting

Monitoring and publicly reporting progress against the Goal is essential to the credibility and success of the Roundtable. Not only will this provide important information on progress to members, it will also act as a useful communication tool, promoting the benefits of collaboration and encouraging other markets towards similar positive change. Efeca has developed a framework which will ensure Members' data is reported in an aggregated, anonymised format to protect commercially-sensitive data.

The monitoring and reporting will be split into two parts, the UK level data analysis (similar to the baseline reporting above) showing UK soya consumption volumes, flows etc. and secondly the progress of the Roundtable itself. Efeca will also work closely with partners such as the AHDB to provide information on global trends, activities and changes to the market.

The UK Roundtable report will not report on members individually, but instead be an unattributed public statement of the progress made by members collectively through the year. To avoid double counting of soya volumes, reporting will not be based on soya volume data but instead using a questionnaire style document called the 'Matrix of Progress' (see Excel spreadsheet separately). This document is divided into four key areas and will 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

Core questions, relating directly to the achievement of the Goal are mandatory.

A small number of 'additional' questions have been added to allow those who have been exploring soya longer or wish to approach soya from multiple perspectives to show additional progress not covered in the core questions. These questions will request a combination of qualitative and quantitative information and aim to recognise the range of different needs and goals of members. For some members, their plans may focus on informing a membership, whereas others may be seeking to increase purchases of certified products.

Ways of working

Roundtable meetings will take place twice per year, in October/November and April/May.

Additional meetings including working groups, briefings, training workshops or similar will be held as directed by Members.

Once a year, an annual report of progress will be produced by Efeca, using publicly available data and information gathered through the monitoring and reporting outlined above.

Efeca will also assemble a small steering group, made up of volunteer Roundtable members, to shape and provide feedback on the direction of the Roundtable.

What we need from you

To be a member of the UK Roundtable on Sustainable Soya, we ask that you are a buyer or specifier of soya or a trade association representing this group. There is no fee to join, or any ongoing costs to be paid to take part. There is no formal 'sign-up' process or agreement, though we do ask that:

- members commit to the Goal of the Roundtable and take part in meetings, providing information for monitoring and reporting purposes and striving towards continual improvement;
- we have your permission to list your organisation as a member.

How we can help you

Efeca can provide technical support, facilitation and other activities to support members to begin to build their plans to achieve the Goal. A retail sector workshop, looking at how physical supply chains of sustainable soya may be developed to meet the Roundtable Goal is being developed for 9th July.

Other activities proposed could include:

- Foot printing/materiality assessment (webinar and potential linked briefing/assistance)
- Soya policy development (workshop/webinar and potential linked briefing/assistance)
- Background and application of FEFAC Soy Sourcing Guidelines (webinar/workshop)
- On-going programme of targeted briefings/webinars
- Provision of updates on global trends, activities, wider initiatives in the EU and beyond and other programmes that could be of interest.

These will be developed by the direction of Members, Efeca welcome any suggestions or proposals from all sectors representing the soya supply chain.

FAQs

Q: Can a trade association be a member of the Roundtable?

A: Yes – we encourage trade association membership but appreciate a trade association may not be able to make a commitment on behalf of all members. Trade association members would be expected to share the details of the Roundtable with members and encourage and support participation, and may be asked for information from Efeca relating to the sector as a whole

Q: If my trade association is a member, do I have to join?

A: While some members may feel that their trade association adequately represents them and meets their needs, some members may prefer to become members themselves, to demonstrate their commitment to sustainable soya to their customers, shareholders and other stakeholders, and to be able to attend meetings themselves and take part in discussions and help shape the support and future development of the Roundtable.

Q: How will my data be used?

A: Efeca will gather qualitative and quantitative information via the Matrix of Progress in order to create the annual update of progress. This information will be kept confidential and will not be shared without your permission. Efeca's data protection policies (compliant with GDPR 2018) can be found on our website at <http://www.efeca.com/privacy/> alternatively, you can email info@efeca.com for more information. Within the annual report, information will be provided in an aggregated, anonymised format to protect confidentiality and ensure no commercially sensitive information is released. Roundtable members will also have the opportunity to review the report before it becomes publicly available.