WWF

REPORT

INT

2016

Soy Scorecard

Assessing the use of responsible soy for animal feed

Sustainability | Conservation | Biodiversity

CONTENTS

On the cover

Jaguars, native to many parts of South America, including the Amazon, the Cerrado and the Chaco, are under threat from irresponsible soy expansion.

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SUMMARY

The WWF Soy Scorecard 2016 shows that while some front-running companies are leading the way on responsible soy, far too many are lagging behind – or hiding from responsibility completely.

69
133

OF THE COMPANIES WE SURVEYED DECIDED NOT TO REPORT ON THEIR USE OF RESPONSIBLE SOY

Every year millions of tonnes of soybeans are used to feed animals reared for meat and dairy products. On average, European consumers eat 61kg of soy per year, most of it in the form of animal products like chicken, pork, beef and farmed fish as well as eggs, milk, cheese and yogurt. The world's appetite for soy shows little sign of slowing down. The Food and Agriculture Organization (FAO)'s projections suggest demand for soy could almost double by 2050 as the global population grows and diets change.

Much of this soy is grown in South America, where too often its cultivation comes at the expense of amazing natural ecosystems such as the Amazon, Cerrado and Chaco – home to spectacular wildlife like jaguars, giant anteaters and armadillos. In half a century, the area of land used to grow soy has increased tenfold. Soy farms now cover over 1 million square kilometres. The area of South America devoted to soy grew from 17 million hectares in 1990 to 46 million hectares in 2010, mainly on land converted from natural ecosystems — and it continues to expand.

It's too high a cost to pay. The current best solution is responsible soy – grown without damage to the environment.

The WWF Soy Scorecard 2016 scores and ranks 133 leading companies on their use of responsible soy. It looks at how these companies source soy for animal feed or animal products, so they can see how well they are addressing one of the world's most serious environmental challenges: the irresponsible production of soy.

This is the second in a series of WWF Soy Scorecards assessing European buyers of soy.

What do the results show?

The WWF Soy Scorecard 2016 finds that the brands whose products we consume daily are doing far too little to protect irreplaceable habitats, spectacular wildlife and people's rights in South America.

While some companies are making commendable progress on soy, worryingly, others are making no progress at all – or are simply hiding from accountability.

By and large the retail sector has made the best showing in the Scorecard, with some dairy companies also taking a lead. However, the companies that are unbranded, like meat and egg processors, are less visible to consumers and show less engagement on the soy issue. Meanwhile, the feed industry is not doing enough despite their central role in the soy supply chain for animal products. Companies, along with consumers and governments, must step up and take urgent action to prevent further loss of rich and diverse landscapes that are vital to the health of the planet, people and species. **Everyone needs to take responsibility**.

Sourcing soy that is certified by the Round Table on Responsible Soy (RTRS) or ProTerra is currently the most credible option for companies to ensure responsible, deforestation- and conversion-free products. **There is no excuse for any company not to begin sourcing and using responsible soy now.**

HEADLINE FINDINGS

- **More than half of the companies (69 out of 133) we surveyed decided not to report to WWF on their use of responsible soy. In the absence of information, we assume that the vast majority of these companies are not doing anything at all to move toward responsible soy.**

+ **16 companies (25 per cent of respondents) are in the "leading the way" category: they have made strong commitments to responsible, deforestation-free soy, and most of the soy they use comes from certified sources.**

+ **45 companies (70 per cent of respondents) are RTRS members, and of those 38 have submitted their annual report to RTRS. One company is also a ProTerra member.**

+ **54 companies (84 per cent of respondents) calculated their soy footprint either partly or fully, while 46 companies (72 per cent of respondents) have reported using responsible soy.**

+ **27 companies (42 per cent of respondents) have committed to 100 per cent responsible soy, while 34 companies (including those that committed to responsible soy) have made generic "deforestation-free" commitments. This sends a clear signal to the soy industry and to governments that they are serious about removing deforestation from their supply chains.**

For the sake of simplicity, we say "use" to represent how companies can and do support responsible soy through any of the supply chain options available through RTRS and ProTerra. Companies buying RTRS credits or mass balance are not, technically, "using" responsible soy, but they are directly supporting responsible soy production.

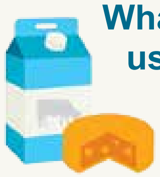
Areas of the Amazon rainforest, shown here, have been cleared for soy.

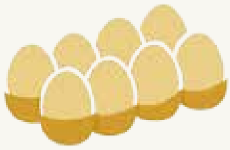
© BRENT STIRTON/GETTY IMAGES

WHAT'S THE PROBLEM WITH SOY?

Soy is one of Earth's fastest growing crops, and its expansion is having a negative impact on vital ecosystems. Demand will only increase, so urgent action is needed – from companies that use soy, governments and financial institutions, and from consumers.

What's soy used for?





High in protein and energy, soy is a key part of the global food supply. It produces more protein per hectare than any other major crop. Three-quarters of soy is used to feed animals, mostly as soy meal. On average, European consumers eat 61kg of soy per year, most of it in the form of animal products like chicken, pork, beef and farmed fish as well as eggs, milk, cheese and yogurt.

Soy can also be used as soy oil, in margarines and many baked and fried products, as well as in other consumer goods like soap and cosmetics. You'll find soy derivatives like the emulsifier lecithin in countless processed foods too, from chocolate to salad dressing. Only about 6 per cent of the soy grown globally is consumed directly as whole beans used to make products like soy burgers and tofu. Another small – but increasing – proportion is used as oil for biodiesel.

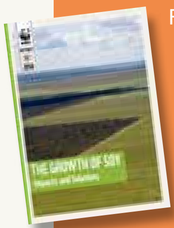
Demand for soy skyrocketing

Global consumption of animal products has risen sharply in recent years – and so has the demand for soy. Irreplaceable ecosystems in South America, such as the Amazon, Cerrado, Chaco and Atlantic forest, are being cleared to make way for soy plantations.

In half a century, the amount of soy produced has increased tenfold. Soy farms now cover over 1 million square kilometres – equivalent to the total area of France, Germany, Belgium and the Netherlands combined. The area of South America devoted to soy grew from 17 million hectares in 1990 to 46 million hectares in 2010, mainly on land converted from natural ecosystems, and it continues to expand. Other important producers are the US, India and China, with a total of around 50 million hectares in 2013[1]. In the US recent cropland expansion at the expense of natural grasslands has been reported, with soy as the first crop in 20 per cent of the area. Cropland expansion outpaces agricultural and biofuel policies in the US[2].

After cattle ranching, soy production was until recently the main driver of deforestation in the Amazon. Thanks to the Soy Moratorium, deforestation caused

THE GROWTH OF SOY: IMPACTS AND SOLUTIONS REPORT



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

All facts in this section, unless otherwise stated, come from *The Growth of Soy*.

1 Kroes, H., Kuepper, B. 2015. *Mapping the Soy Supply Chain in Europe: A Research Paper Prepared for WNF.*
2 Environ. Res. Lett. 10 (2015) 044003.

by soy has been reduced to almost zero during the last decade, while Amazonian soy production doubled in the same period, on already deforested areas (see annex).

Nevertheless, soy continues to be a serious threat to the vulnerable, biodiversity-rich Atlantic rainforest in Paraguay and Argentina. In the Cerrado – a vast expanse of savannah and forest in Brazil that's home to around 5 per cent of all species on Earth – soy farms now cover 15 million hectares, or an area the size of England[3] and expansion is still converting large remaining areas of natural habitats. WWF recently identified these three areas as among the 11 "deforestation fronts" most at risk of large-scale forest loss over the next 15 years.

Other lesser-known ecosystems have felt the impact too. Soy expansion is a big threat to one of South America's last frontiers, the Gran Chaco in Argentina, and to Bolivia's Chiquitano forest – the largest patch of tropical dry forest on the planet. Natural grasslands in Argentina and Uruguay are also being lost to soy cultivation.

Negative consequences for the environment, people and species

The destruction of these natural ecosystems has severe and far-reaching consequences.

Soy is grown in some of the most important areas for biodiversity on the planet. Species under threat include the jaguar, maned wolf and giant anteater, among many others. Habitat loss has led to sharp declines in biodiversity: between 1970 and 2010, vertebrate species populations in Latin America fell by 83 per cent, the steepest decline anywhere in the world[4].

SOY IS GROWN IN SOME OF THE MOST IMPORTANT AREAS FOR BIODIVERSITY ON THE PLANET

People are suffering too. Clearing forests for agriculture threatens local and indigenous communities whose way of life depends on the forest and the resources it provides: evictions of indigenous communities to make way for soy production have been documented in Argentina and Paraguay. In addition, soy production tends to use large quantities of agrochemicals, which can contaminate soils and water supplies, threatening people and nature's health. Other negative impacts include soil erosion, pest and disease outbreaks, and the loss of pollinators.

While soy is a highly profitable crop, not everybody shares the economic benefits. In the Americas, soy tends to be grown on an industrial scale: this can disadvantage smallholders and lead to a loss of rural jobs. Conflicts have arisen as more land becomes concentrated in fewer hands. Exploitative labour conditions have also been reported on soy farms.

Deforestation is also a major cause of global climate change, as well as affecting local rainfall patterns and water supplies.

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3 Rudorff, B., Risso, J. et al. 2015. *Geospatial Analyses of the Annual Crops Dynamic in the Brazilian Cerrado Biome: 2000 to 2014.*
4 WWF. 2014. *Living Planet Report.*

Urgent action needed

The world's appetite for soy shows little sign of slowing down. **FAO projections suggest demand for soy could almost double by 2050** as the global population grows and diets change.

Recent studies have shown that soy production could increase massively without new destruction of natural ecosystems. For example, increasing the low productivity of Brazilian cultivated pasturelands by only 20 per cent would liberate enough land to meet growing soy demand until 2040 without cutting down one single tree[5].

If ever-growing global demand for soy is to be met without negative impacts on people and nature, then the soy industry needs to change. And that can't just be up to the producers. **Everyone needs to take responsibility**.

5 Strassburg, B., Latawiec, A. et al. 2014. *When enough should be enough: Improving the use of current agricultural lands could meet production demands and spare natural habitats in Brazil.* Global Environmental Change (28).

A dry soy plantation in Barreiras, Brazil.

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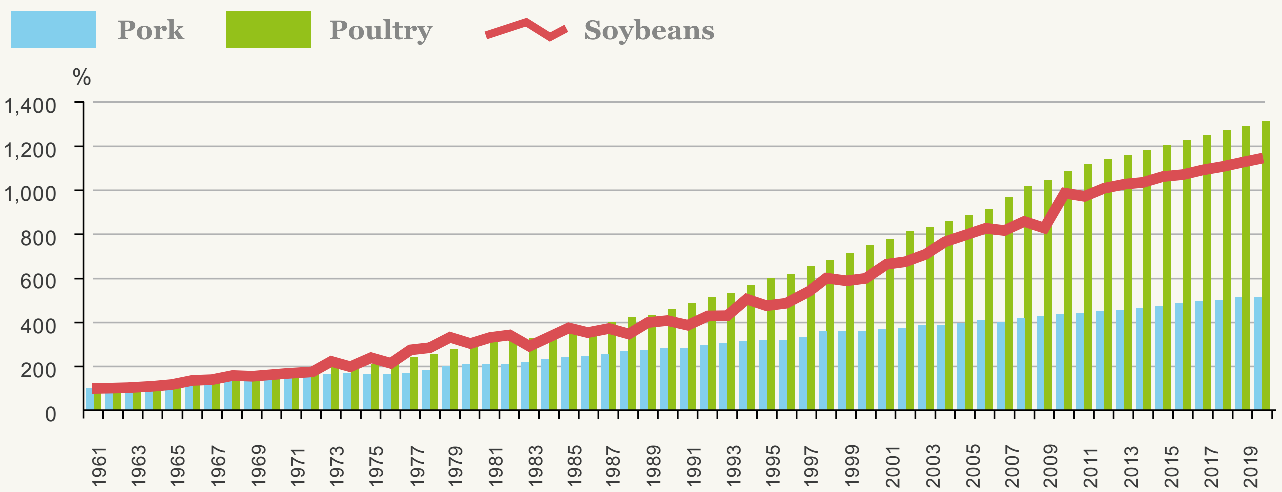
Figure 1

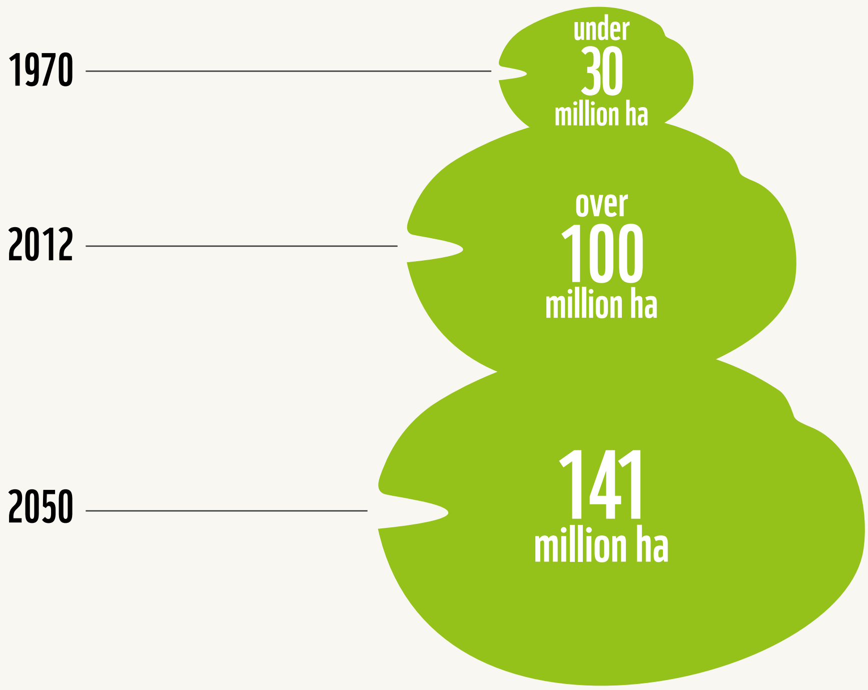
CURRENT AND PROJECTED DEVELOPMENT OF SOYBEAN AND MEAT PRODUCTION: 1961-2020



Source: KPMG. 2013. *Sustainable Insight. A roadmap to responsible soy*: *Approaches to increase certification and reduce risk.*

Figure 2

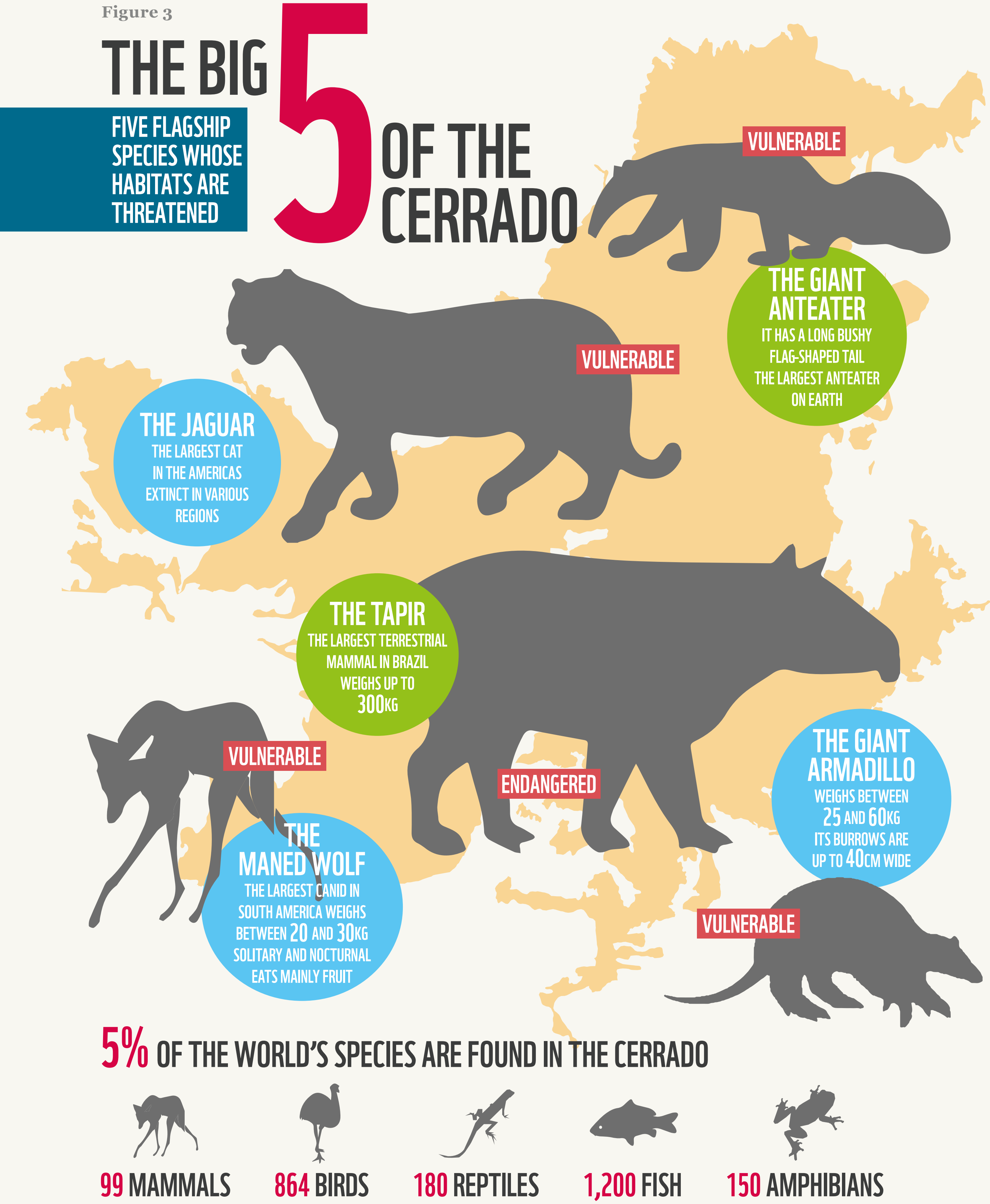
GROWTH IN GLOBAL SOY AREA



Sources: Agralytica. 2012. *Connections 2012 Soybean Market Scan*; FAOSTAT. 2013. *FAO Statistics Yearbook 2013*; Bruinsma, J. 2009. *The resource outlook to 2050: by how much do land, water and crop yields need to increase by 2050?* Paper presented at the FAO Expert Meeting, 24-26 June 2009, Rome on “How to Feed the World in 2050”.

THE SOY INDUSTRY NEEDS TO CHANGE. AND THAT CAN'T JUST BE UP TO THE PRODUCERS. **EVERYONE NEEDS TO TAKE RESPONSIBILITY**

Figure 3



THE BIG 5 OF THE CERRADO
FIVE FLAGSHIP SPECIES WHOSE HABITATS ARE THREATENED
VULNERABLE
THE GIANT ANTEATER
IT HAS A LONG BUSHY FLAG-SHAPED TAIL
THE LARGEST ANTEATER ON EARTH
VULNERABLE
THE JAGUAR
THE LARGEST CAT IN THE AMERICAS
EXTINCT IN VARIOUS REGIONS
THE TAPIR
THE LARGEST TERRESTRIAL MAMMAL IN BRAZIL
WEIGHS UP TO 300KG
ENDANGERED
VULNERABLE
THE MANED WOLF
THE LARGEST CANID IN SOUTH AMERICA WEIGHS BETWEEN 20 AND 30KG
SOLITARY AND NOCTURNAL
EATS MAINLY FRUIT
THE GIANT ARMADILLO
WEIGHS BETWEEN 25 AND 60KG
ITS BURROWS ARE UP TO 40CM WIDE
VULNERABLE
5% OF THE WORLD'S SPECIES ARE FOUND IN THE CERRADO
99 MAMMALS
864 BIRDS
180 REPTILES
1,200 FISH
150 AMPHIBIANS

WHAT CAN COMPANIES DO?

In the coming decades, the world will consume more soy than ever before. It doesn't have to come at the expense of nature or people. Companies must take action now.

It is possible to produce more soy without destroying more forests, savannahs, grasslands and wetlands, while also respecting the rights of local people, providing decent working conditions and reducing the use of agrochemicals.

The best immediate option for companies is to commit to using only soy that is responsibly-produced, and deforestation- and conversion-free. Sourcing soy that is certified by RTRS or ProTerra is currently the most credible option for companies to implement these commitments in a transparent and verifiable way.

For the longer term, additional strategies, like reducing consumption and waste, and finding responsible alternative protein sources, are essential to the achievement of zero conversion as well as for ensuring the global footprint stays within the carry capacity of the planet. Companies are encouraged to additionally, but not exclusively, start working on these strategies.

At the same time other actors like governments and consumers also need to act. See page 33 **for more information.**

Round Table on Responsible Soy

WWF helped to set up RTRS a decade ago. Nearly 200 members have since joined, including many major producers, traders and buyers. To achieve RTRS certification, soy producers must not clear native forest or any land that is important for wildlife and people; respect the law; follow Better Management Practices in areas such as fertilizer and pesticide use; and treat communities and workers fairly.

The first RTRS-certified soy came onto the market in 2011. In 2015 2.3 million tonnes of soy – representing 0.7 per cent of global supply – were RTRS-certified. We expect to see a strong increase in volumes of responsible soy over the next few years. One of the purposes of this Scorecard is to encourage companies to take action and follow through on the commitments they have made to buying and using responsible soy, and to encourage others to follow suit.

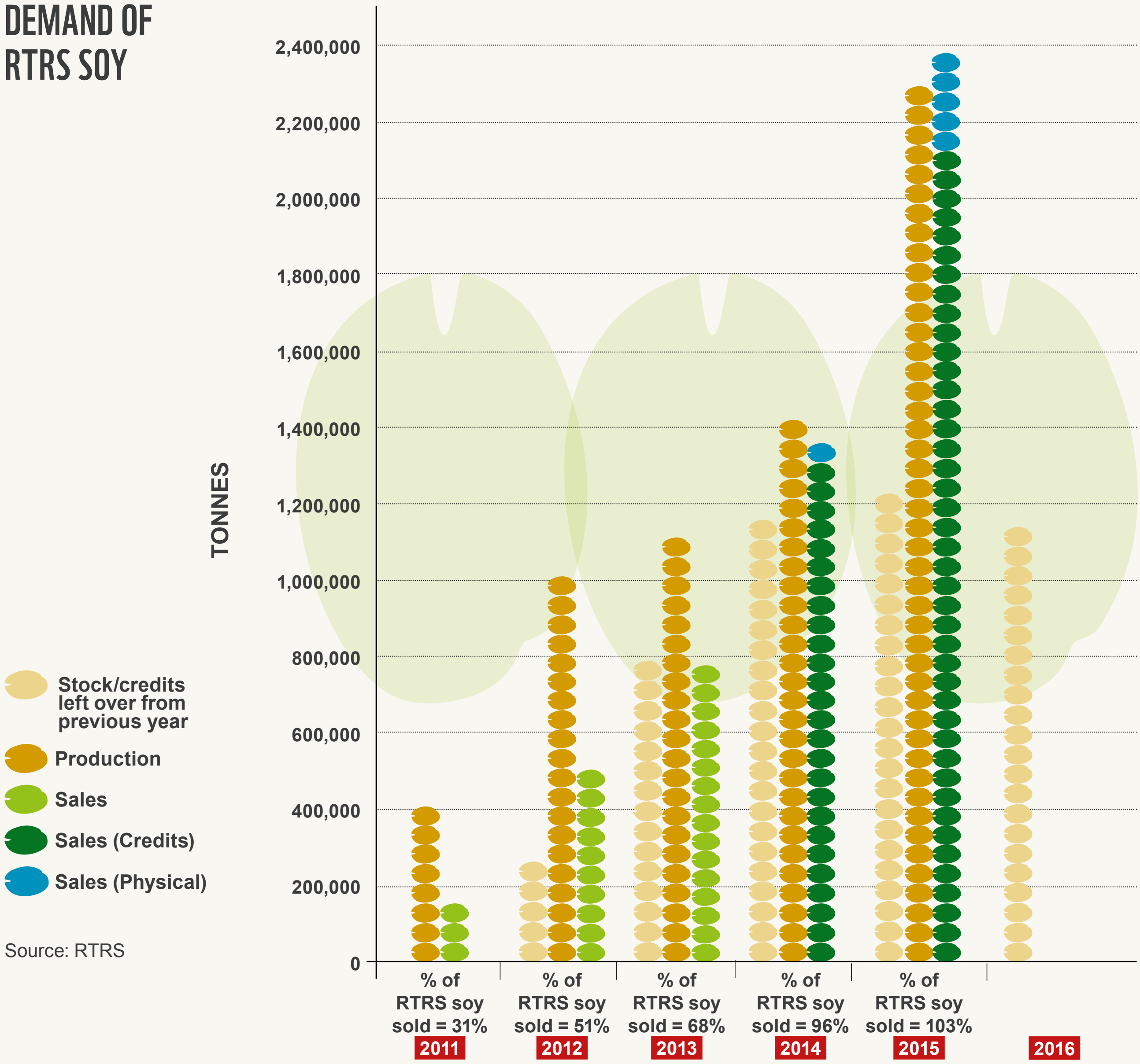
ProTerra

The ProTerra standard is broadly equivalent to RTRS, but exclusively certifies non-genetically-modified (GM) soy. In 2015, 3.6 million tonnes of soy were certified by ProTerra. Though WWF is calling for improvements in ProTerra's governance and transparency, for a decade it has been a credible alternative for companies that want to use responsible and GM-free soy.

See the annex on page 39 for more information about RTRS and ProTerra.

Figure 4

SUPPLY AND DEMAND OF RTRS SOY



Source: RTRS

Deforestation-free supply chains

Many leading companies have committed to "deforestation-free" supply chains.

The Consumer Goods Forum, which represents 400 of the world's largest manufacturers and retailers, has committed to work toward achieving an end to deforestation by 2020. Furthermore, a number of international banks, as part of the Banking Environment Initiative, have launched the Soft Commodities' Compact to help their clients build sustainable supply chains. Both initiatives identify soy as one of the four key drivers of deforestation, and advise companies to choose RTRS-certified soy.

Soy Moratorium in the Brazilian Amazon

In 2006, following international concern from consumers and pressure from major companies like McDonald's, Carrefour and Tesco, Brazil's main processors and exporters pledged that they would not buy soy produced on any recently deforested land in the Amazon. Initially the Moratorium was set for two years, but it has proved so successful in limiting deforestation that it has been renewed every year since. In May 2016 it was renewed for an indefinite period.

New York Declaration on Forests

In 2014, many governments, companies and NGOs signed the New York Declaration on Forests. It pledges to halve natural forest loss by 2020, and strives to end it by 2030 – including deforestation related to soy.

Building on these developments

We urgently need to build on these developments to create a responsible soy industry. The longer we delay, the more irreplaceable forests and natural ecosystems will be lost, causing even greater damage to biodiversity, people and the climate.

ABOUT THE SCORECARD

Part of an effort to transform the soy industry, WWF's Soy Scorecard brings transparency to the use of soy by companies who either buy soy directly (such as feed companies) or buy animal products containing embedded soy (such as retailers, meat and egg processing companies and brands).

This is the second in a series of WWF Soy Scorecards assessing European buyers of soy. These, as well as future WWF Soy Scorecards, will trace progress of companies over time.

The aim of the Scorecards is to highlight those companies deep into the supply chain that have no consumer face, holding up a mirror to 133 of Europe's major retailers, food service companies, processed food manufacturers and dairy, meat, egg and feed companies.

This Scorecard shows them – and the rest of the world – how well they are addressing one of our most serious environmental challenges: the irresponsible production of soy.

HOW COMPANIES WERE ASSESSED

The WWF Soy Scorecard 2016 measures 133 European companies' commitments, plans and actions on responsible soy.

The companies are based in Belgium, Denmark, Finland, France, the Netherlands, Poland, Sweden, Switzerland and the UK, though many also operate internationally. These countries account for a large share of soy use in Europe. Europe is currently the prime market for responsible soy and strong demand there is expected to influence other markets.

Some of the companies buy soy directly to make animal feed; others process, buy and sell products in which soy is already embedded, such as meat, eggs, dairy and farmed fish. WWF selected the companies based on its judgement of the main (embedded) soy users.

As in our first Scorecard in 2014, we focused on the use of soy in animal products as this accounts for almost three-quarters of all soy produced globally, and an even higher proportion (93 per cent) in Europe[6]. We focused on the use of soy in purchased meat, eggs, dairy and farmed fish. Though large proportions are embedded in purchased processed foods, most companies have not started calculating those volumes yet.

COMPANIES WERE ASSESSED ON BOTH COMMITMENTS AND ACTIONS

We didn't assess companies' use of soy oil or soy for human consumption, in products such as margarine or tofu. However, some companies have made progress in sourcing responsible soy for these uses, and we've highlighted this where relevant.

Companies were assessed on both commitments and actions, as outlined in the table below. **The maximum achievable score is 24 points**.

Commitment/action	Maximum number of points
Membership of RTRS or ProTerra; submission of RTRS annual report 2015	2
Public commitments	**9**
✔ Responsible (RTRS/ProTerra) soy	✔ 3
✔ No deforestation	✔ 2
✔ No conversion of other valuable landscapes	✔ 2
✔ Protect High Conservation Values	✔ 1
✔ Soy Moratorium	✔ 1
Soy purchasing	**13**
✔ Transparency around soy use in animal feed	✔ 3
✔ How much responsible soy was purchased	✔ 8
✔ Supply chain options	✔ 2
Support of small- or medium-sized producers	**5***
✔ Purchase of credits	✔ 1
✔ Financial support of projects	✔ 4*

*Maximum total for purchase, supply chain options and financial support of projects capped at 10

6 Kroes, H., Kuepper, B. 2015. *Mapping the Soy Supply Chain in Europe: A Research Paper Prepared for WNF.*

EUROPE IS CURRENTLY THE PRIME MARKET FOR RESPONSIBLE SOY

We also asked for additional policies on areas such as using non-GM soy, responsible alternatives, and reducing waste and consumption. We've listed these, but not analysed or scored them.

The assessed companies are classified into five groups:

- Leading the way
- Well on the path
- Started the journey
- Not yet in the starting blocks
- Non-respondents

For more details, please visit soyscorecard.panda.org/methodology

A soy processing facility.

SOY SCORECARD 2016: KEY STATS

IN 2016, SOME COMPANIES ARE MAKING COMMENDABLE PROGRESS ON SOY. BUT MANY MORE ARE MAKING NO PROGRESS AT ALL OR ARE SIMPLY HIDING FROM ACCOUNTABILITY

133 COMPANIES ASSESSED IN **9** EUROPEAN COUNTRIES,
UP FROM **88** COMPANIES IN **5** COUNTRIES IN **2014**

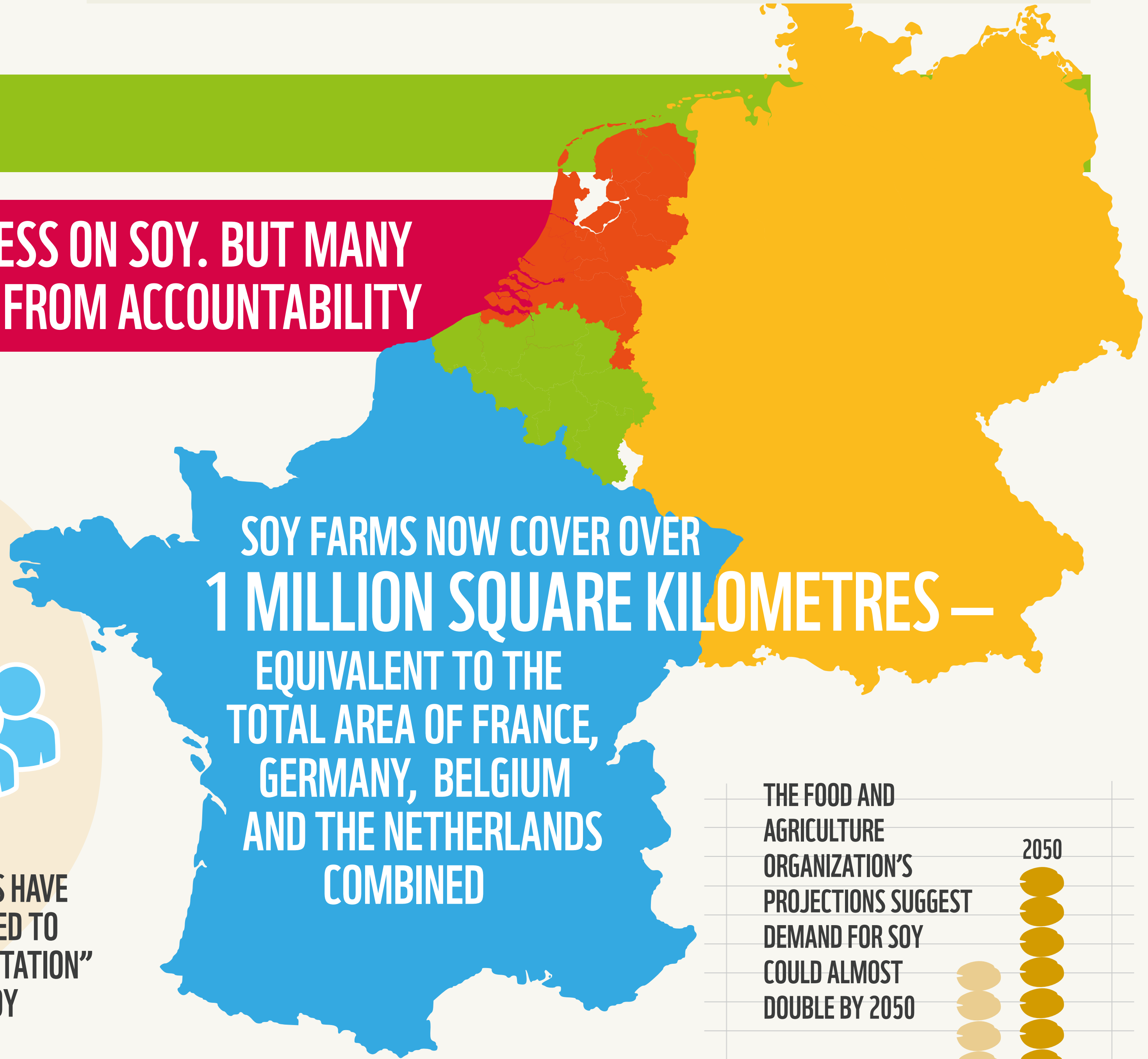
64 COMPANIES RESPONDED

27 COMPANIES HAVE COMMITTED TO USING 100 PER CENT RESPONSIBLE SOY

46 COMPANIES HAVE REPORTED USING RESPONSIBLE SOY

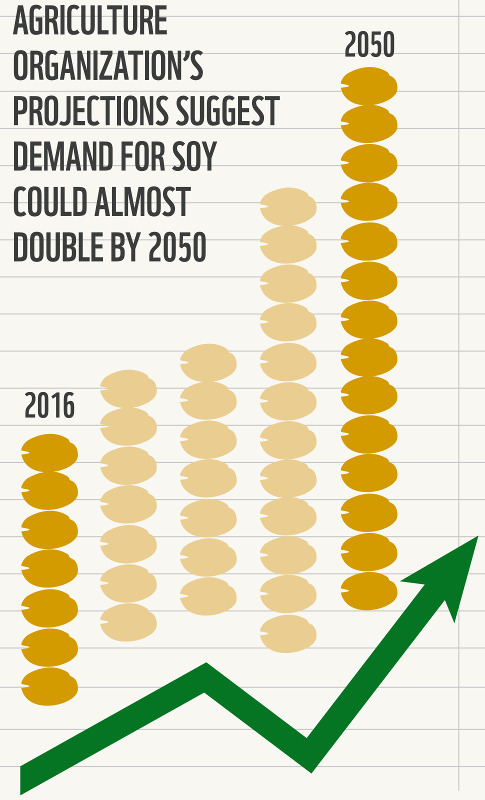
45 RESPONDENTS ARE RTRS MEMBERS

34 COMPANIES HAVE COMMITTED TO "NO DEFORESTATION" FOR SOY



SOY FARMS NOW COVER OVER
1 MILLION SQUARE KILOMETRES –
EQUIVALENT TO THE TOTAL AREA OF FRANCE, GERMANY, BELGIUM AND THE NETHERLANDS COMBINED

THE FOOD AND AGRICULTURE ORGANIZATION'S PROJECTIONS SUGGEST DEMAND FOR SOY COULD ALMOST DOUBLE BY 2050



IN HALF A CENTURY, THE AREA OF LAND USED TO GROW SOY HAS INCREASED **TENFOLD**

3/4 OF **SOY** IS USED TO **FEED ANIMALS**

YOU CAN HELP BY SHARING THIS SCORECARD ON SOCIAL MEDIA OR TWEETING DIRECTLY TO A COMPANY OR BRAND – VISIT SOYSCORECARD.PANDA.ORG NOW

WHAT DO THE SCORECARD RESULTS SHOW?

While there are encouraging signs, the overall results of the 2016 Scorecard are disappointing – as was the case in 2014, when we published the first Soy Report Card.

WWF assessed 133 companies in nine European countries, up from 88 companies in five countries in 2014. Some companies are making commendable progress on soy. But worryingly, others are making no progress at all or are simply hiding from accountability.

Market leaders

A group of market leaders is using only RTRS- or ProTerra-certified soy, reducing their impact on forests and other valuable habitats. Their actions and public commitments demonstrate that it is possible for companies of all sizes and across all sectors to use responsible, deforestation-free soy that does not harm nature or people.

Another group has made commitments on responsible soy and/or deforestation-free supply chains, and started to source responsible soy in small amounts, which are good first steps.

Laggards

WWF URGES THESE COMPANIES TO MAKE THEIR SOY USE AND SOY POLICIES PUBLIC

Many more companies are lagging far behind. This simply isn't good enough.

More than half of the companies have decided not to respond to WWF's questionnaire. In the absence of information, we assume that the vast majority of these companies are not doing anything at all. The fact that only six of the 69 non-respondents (9 per cent) are RTRS members, as opposed to 45 (70 per cent) of the respondent companies, seems to point in that direction.

WWF urges these companies to make their soy use and soy policies public. **Transparency is an essential step on the journey to responsible soy**. Companies should be accountable for their performance. Information is critical for producers and traders to assess the market for responsible soy – without it, they may not have the incentive to move to responsible soy production.

Companies showing progress

Encouragingly, many of the companies and countries that responded have taken steps toward responsible sourcing of soy:

- 16 companies (25 per cent of respondents) are **"leading the way"**: they have made strong commitments to responsible, deforestation-free soy, and most of the soy they use comes from certified sources.
- 10 companies (16 per cent of respondents) are **"well on the path"** – they have made good progress on responsible soy.
- 32 companies (50 per cent of respondents) have **"started the journey"**, meaning they've taken some first steps in the right direction, but still have a long way to go.
- 45 companies (70 per cent of respondents) are **RTRS members**, and of those 38 have submitted their annual report to RTRS. One company is also a ProTerra member.
- 54 companies (84 per cent of respondents) **calculated their soy footprint** either partly or fully.
- 46 companies (72 per cent of respondents) have reported **using responsible soy**.
- 27 companies (42 per cent of respondents) have **committed to 100 per cent responsible soy**, while 34 companies (including those that committed to responsible soy) have made generic **"deforestation-free" commitments**. This sends a clear signal to the soy industry and to governments that they are serious about removing deforestation from their supply chains.

ENCOURAGINGLY, MANY OF THE COMPANIES AND COUNTRIES THAT RESPONDED HAVE MADE PROGRESS IN THE LAST TWO YEARS

A soy field in the Cerrado.

© Jan Gilhuis/Solidaridad

RESULTS

RETAIL AND FOOD SERVICE COMPANIES

leading the way
well on the path
started the journey
not yet in the starting blocks
non-respondent

Company	Country of HQ	Sector	RTRS or PT member	Responsible soy commitment	'No deforestation' commitment	Volume of responsible soy used*	% of responsible soy used*	GM policy	Additional strategies	Status 2014	Score 2016
ICA Sverige	Sweden	Retail	RTRS	✓ BY 2015	✓ BY 2015	21,700 t	100%	No	Yes		23.5
Axfood	Sweden	Retail	RTRS	✓ BY 2015	✓ BY 2015	7,406 t	100%	Yes	Yes		22
Coop Sweden	Sweden	Retail	RTRS	✓ BY 2015	✓ BY 2015	11,795 t	100%	No	Yes		22
Martin & Servera	Sweden	Food service	RTRS	✓ BY 2015	✓ BY 2015	4,538 t	100%	No	Yes		22
Albert Heijn	Netherlands	Retail	RTRS	✓ BY 2015	✓ BY 2015	36,660 t	100%	No	Yes		21
Jumbo Supermarkten	Netherlands	Retail	RTRS	✓ BY 2015	✓ BY 2015	107,335 t	100%	No	Yes		21
Superunie	Netherlands	Retail	RTRS	✓ BY 2015	✓ BY 2015	180,000 t	100%	No	Yes		21
ICA Gruppen	Sweden	Retail	RTRS	✓ BY 2015	✓ BY 2015	21,700 t	86%	No	Yes	NA	20
Marks & Spencer	UK	Retail	RTRS	✓ BY 2020	✓ BY 2020	25,156 t	52%	No	Yes		18.5
Waitrose	UK	Retail	RTRS	✓ BY 2020	✓ BY 2020	33,574 t	65%	Yes	Yes		18.5
Royal Ahold	Netherlands	Retail	RTRS	✓ BY 2015	✓ BY 2015	50,841 t	44%	No	No		14.5
Colruyt Group	Belgium	Retail	RTRS	✓ BY 2016	✓ BY 2016	6,326 t	25%	Yes	Yes	NA	13
Tesco	UK	Retail	RTRS	⊗	✓ BY 2020	7,289 t	3%	Yes	Yes		9.5
Carrefour	France	Retail	RTRS	⊗	✓ BY 2020	105,000 t	?	Yes	Yes		8.5
KLM Royal Dutch Airlines	Netherlands	Food service	RTRS	⊗	⊗	160 t	67%	No	No		7.5
ASDA	UK	Retail	RTRS	⊗	✓ BY 2020	19,500 t	11%	No	Yes		7
Ruokakesko Oy/Kesko Food	Finland	Retail	RTRS	✓ BY 2020	✓ BY 2020	?	?	Yes	Yes	NA	7
Co-operative Food (UK)	UK	Retail	RTRS	⊗	⊗	525 t	1%	Yes	Yes		6.5
Sainsbury's	UK	Retail	RTRS	⊗	✓ BY 2020	0	0%	Yes	Yes		6
SOK - S Group	Finland	Retail	⊗	⊗	⊗	7,125 t	34%	Yes	Yes	NA	5
Delhaize Group	Belgium	Retail	RTRS	⊗	✓ BY 2020	10,000 t	12%	No	Yes	NA	4.5
WM Morrison	UK	Retail	RTRS	⊗	⊗	8,510 t	7%	Yes	Yes		4.5
Compass Group	UK	Food service	RTRS	⊗	⊗	0	0%	No	Yes		4
Sodexo	France	Food service	⊗	⊗	✓ BY 2020	0	0%	Yes	Yes		3
Nando's	UK	Food service	RTRS	⊗	⊗	?	?	No	Yes		2
Système U	France	Retail	⊗	⊗	⊗	0	0%	Yes	Yes		0.5
Dansk Supermarked Group	Denmark	Retail	⊗	⊗	⊗	?	?	No	No		0
Elior Group	France	Food service	⊗	⊗	⊗	?	?	No	No		0
Pret A Manger	UK	Food service	⊗	⊗	⊗	?	?	No	Yes	NA	0
Albron	Netherlands	Food service	NR	NR	NR	NR	NR	NR	NR		NR
Alma Market	Poland	Retail	NR	NR	NR	NR	NR	NR	NR	NA	NR
Auchan	France	Retail	NR	NR	NR	NR	NR	NR	NR		NR
Brakes	UK	Food service	NR	NR	NR	NR	NR	NR	NR	NA	NR
Casino	France	Retail	NR	NR	NR	NR	NR	NR	NR		NR
Coop Denmark	Denmark	Retail	NR	NR	NR	NR	NR	NR	NR		NR
Dagrofa	Denmark	Retail	NR	NR	NR	NR	NR	NR	NR		NR
E.Leclerc	France	Retail	NR	NR	NR	NR	NR	NR	NR		NR
Eurocash Group	Poland	Retail	NR	NR	NR	NR	NR	NR	NR	NA	NR
Grupa Maspex Wadowice	Poland	Retail	NR	NR	NR	NR	NR	NR	NR	NA	NR
Iceland	UK	Retail	NR	NR	NR	NR	NR	NR	NR		NR
IKEA	Sweden	Food service	NR	NR	NR	NR	NR	NR	NR	NA	NR
Jerónimo Martins Polska	Poland	Retail	NR	NR	NR	NR	NR	NR	NR	NA	NR
Les Mousquetaires/ Intermarché	France	Retail	NR	NR	NR	NR	NR	NR	NR		NR
Piotr i Paweł	Poland	Retail	NR	NR	NR	NR	NR	NR	NR	NA	NR
POLOmarket	Poland	Retail	NR	NR	NR	NR	NR	NR	NR	NA	NR
PSH Lewiatan	Poland	Retail	NR	NR	NR	NR	NR	NR	NR	NA	NR
Whitbread	UK	Food service	NR	NR	NR	NR	NR	NR	NR	NA	NR
Żabka	Poland	Retail	NR	NR	NR	NR	NR	NR	NR	NA	NR

*In some cases the total volumes, and therefore the % of certified soy, are estimated

ANALYSIS: RETAIL AND FOOD SERVICE COMPANIES

Overall, this sector is progressing – but still has a long way to go.

48
companies assessed, 29 responded

13
companies have committed to using 100 per cent responsible soy

20
companies have reported using a total of 607,000 tonnes of responsible soy

19
companies have committed to "no deforestation" for soy

23
respondents are RTRS members

Retail companies sit near the end of the supply chain and can send a powerful message to their suppliers about the need for responsible soy. It's vital they pledge to use only deforestation- and conversion-free soy, and demand RTRS or ProTerra certification. Encouragingly, retail companies as a whole are advancing on this issue – although many still have work to do.

Which companies are performing well?

We are pleased to see that seven Swedish and Dutch retailers are "leading the way": **ICA Sverige, Axfood, Coop Sweden, Albert Heijn, Jumbo Supermarkten, Superunie** and **ICA Gruppen**. While food service companies generally performed poorly, Sweden's **Martin & Servera** is a positive exception in the "leading the way" category.

Four companies are "well on the path": **Waitrose** and **Marks & Spencer** from the UK, alongside **Royal Ahold** and **Colruyt Group**. Encouragingly, some companies that did not respond two years ago are now starting the journey by becoming RTRS members and working on policies. They include **Nando's** and **Compass Group**.

Which companies need to do more?

Food service companies are lagging behind. Many are still "in the starting blocks" or still need to start the journey. 19 retail and food service companies out of the 48 that WWF contacted (40 per cent) didn't respond to the questionnaire. This is extremely disappointing.

Commitments to responsible soy

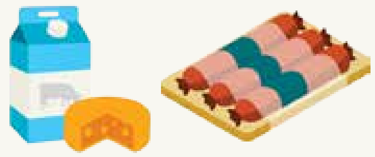
In the retail and food service sector, 23 of the 29 companies that responded (79 per cent) are RTRS members, and almost all of them have submitted their annual report. 24 respondents (83 per cent) calculated their soy footprint, partially or fully, telling us they use 1.6 million tonnes of soy in total.

WWF WELCOMES THE FORWARD MOVEMENT BY SOME RETAILERS WHO HAVE SHOWN THE WAY AND MADE GLOBAL COMMITMENTS TO RESPONSIBLE SOY

13 companies (45 per cent of respondents) have made a commitment to use 100 per cent responsible soy, while 20 have reported using a total of 607,000 tonnes of responsible soy. 19 companies (66 per cent of respondents), including those specifying responsible soy, have pledged to use soy free from deforestation. WWF is happy that the retail and food service sector is giving this clear signal to traders and producers.

WWF welcomes the forward movement by some retailers who have shown the way and made global commitments to responsible soy. However, more retailers should follow suit to assure their customers that their products do not contain irresponsibly-produced soy and reduce their reputational risk. They should push their suppliers to source responsible soy, and if this fails, at least in the short term, they should cover their use of soy with RTRS certificates.

Soy is found in many of the everyday products we buy in the supermarket, including meat and dairy.



RESULTS

DAIRY AND PROCESSED FOOD MANUFACTURERS

- leading the way
- well on the path
- started the journey
- not yet in the starting blocks
- non-respondent

Company	Country of HQ	Sector	RTRS or PT member	Responsible soy commitment	'No deforestation' commitment	Volume of responsible soy used*	% of responsible soy used*	GM policy	Additional strategies	Status 2014	Score 2016
Arla Foods	Denmark	Dairy	RTRS	✓ BY 2015	✓ BY 2015	425,400 t	100%	Yes	Yes		21.5
Skånemejerier	Sweden	Dairy	⊗	✓ BY 2015	✓ BY 2015	8,810 t	100%	Yes	Yes	NA	20.5
BEL Group	France	Dairy	RTRS	✓ BY 2015	✓ BY 2015	58,000 t	70%	No	Yes		20
FrieslandCampina	Netherlands	Dairy	RTRS	✓ BY 2015	✓ BY 2015	200,000 t	90%	Yes	Yes		20
Unilever	Netherlands	Processed food	RTRS	✓	✓ BY 2020	6,200 t	8%	No	Yes		10
Young's Seafood	UK	Processed food	⊗	⊗	⊗	6,759 t	75%	No	Yes		8.5
Danone	France	Dairy	⊗	✓ BY 2020	✓ BY 2020	0	0%	Yes	Yes		8
Vandemoortele	Belgium	Processed food	RTRS	⊗	⊗	0	0%	No	No	NA	4
Groupe Lactalis	France	Dairy	⊗	⊗	⊗	552 t	?	No	No		2
Iglo Group	UK	Processed food	⊗	⊗	✓ BY 2020	?	?	No	Yes		2
Grupa MLEKOVITA	Poland	Dairy	⊗	⊗	⊗	?	?	Yes	No	NA	0
Dairy Crest	UK	Dairy	NR	NR	NR	NR	NR	NR	NR		NR
First Milk	UK	Dairy	NR	NR	NR	NR	NR	NR	NR		NR
Milcobel	Belgium	Dairy	NR	NR	NR	NR	NR	NR	NR	NA	NR
Nestlé	Switzerland	Processed food	NR	NR	NR	NR	NR	NR	NR	NA	NR
OSM Łowicz	Poland	Dairy	NR	NR	NR	NR	NR	NR	NR	NA	NR
Savencia Fromage & Dairy/Bongrain	France	Dairy	NR	NR	NR	NR	NR	NR	NR		NR
Sligro Food Group	Netherlands	Processed food	NR	NR	NR	NR	NR	NR	NR		NR
SM MLEKPOL	Poland	Dairy	NR	NR	NR	NR	NR	NR	NR	NA	NR
Sodiaal	France	Dairy	NR	NR	NR	NR	NR	NR	NR		NR
Solarec	Belgium	Dairy	NR	NR	NR	NR	NR	NR	NR	NA	NR
Ter Beke	Belgium	Processed food	NR	NR	NR	NR	NR	NR	NR	NA	NR

*In some cases the total volumes, and therefore the % of certified soy, are estimated

ANALYSIS: DAIRY AND PROCESSED FOOD MANUFACTURERS

While some companies have made good progress, others lag far behind or did not respond.

22
companies assessed, 11 responded

6
companies have committed to using 100 per cent responsible soy

7
companies have reported using a total of 706,000 tonnes of responsible soy

7
companies have committed to “no deforestation” for soy

5
respondents are RTRS members

Results for dairy and processed food manufacturers that use animal products are mixed, with a number of companies having a long way to go on the journey to responsible soy.

Which manufacturers are performing well?

Four dairy manufacturers are commendably “leading the way”. **Bel Group** has joined the frontrunners of 2014 **FrieslandCampina** and **Arla Foods. Skånemejerier**, a small Swedish subsidiary of Lactalis, is also performing well, though its parent company’s progress is minimal.

Of the processed food manufacturers, **Unilever** is performing best as the only one “well on the path” on embedded soy. The company has also made significant progress on soy used directly for human consumption, its main soy footprint, but this is out of the scope of this Scorecard.

Which manufacturers need to do more?

Of the remaining companies from this sector that responded, five (45 per cent) have “started the journey”, while one is “not yet in the starting blocks”.

Very disappointingly, half the dairy or processed food manufacturers (11 in total) did not respond at all to our questionnaire: they include **Nestlé** (Switzerland); **Dairy Crest** (UK); **Sodiaal** and **Savencia Fromage & Dairy/Bongrain** (France); and **Milcobel** and **Solarec** (Belgium).

Commitments to responsible soy

RESULTS FOR DAIRY AND PROCESSED FOOD MANUFACTURERS THAT USE ANIMAL PRODUCTS ARE MIXED

Only six dairy and processed food manufacturers (55 per cent of the respondents from this sector) have committed to responsible soy, while seven companies including the above (64 per cent of respondents) have pledged to achieve deforestation-free supply chains. Just five companies are RTRS members. This indicates a lack of awareness of the issues surrounding soy by companies that could be seen to be uninterested in offering their consumers responsibly-produced meat and dairy products. Seven companies reported using a total of 706,000 tonnes of responsible soy.

More positively, nine companies (82 per cent of respondents) have started to calculate their full soy volume, reporting a total volume of 1.7 million tonnes between them.

The dairy and processed food manufacturers that have done well have proved that it's possible to calculate their soy use and begin to take the steps to cover that use with responsible soy. Other companies in this sector should follow suit, especially those manufacturing (branded) meat products.

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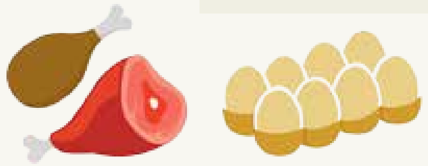
Soy is an ingredient in the feed for animals used in dairy production.



RESULTS

MEAT AND EGG PROCESSING COMPANIES

leading the way
well on the path
started the journey
not yet in the starting blocks
non-respondent

Company	Country of HQ	Sector	RTRS or PT member	Responsible soy commitment	'No deforestation' commitment	Volume of responsible soy used*	% of responsible soy used*	GM policy	Additional strategies	Status 2014	Score 2016
HKScan Sweden	Sweden	Meat	RTRS	✓ BY 2015	✓ BY 2015	34,252 t	100%	Yes	Yes		22
Kronfågel	Sweden	Meat	RTRS	✓ BY 2015	✓ BY 2015	30,800 t	100%	Yes	Yes	NA	20
HKScan	Finland	Meat	RTRS	✓ BY 2018	✓ BY 2018	36,275 t	30%	Yes	Yes	NA	14
Scandi Standard	Sweden	Meat	RTRS	✓ BY 2020	✓ BY 2020	39,700 t	52%	Yes	Yes	NA	14
Atria Scandinavia	Sweden	Meat	RTRS	✗	✗	9,022 t	89%	No	Yes	NA	13
Gebr. van Beek Group	Netherlands	Eggs	RTRS	✗	✗	5,000 t	50%	Yes	Yes		8
Vion Food Group	Netherlands	Meat	RTRS	✗	✗	22,000 t	?	Yes	No		2.5
2Sisters Storteboom	Netherlands	Meat	RTRS	✗	✗	?	?	No	No		2
Compaxo Vlees	Netherlands	Meat	✗	✗	✗	600 t	2%	No	Yes		2
Plukon Food Group	Netherlands	Meat	✗	✗	✗	?	?	Yes	Yes		2
Faccenda Foods	UK	Meat	✗	✗	✗	0	0%	No	No		0.5
Belgian Pork Group	Belgium	Meat	✗	✗	✗	?	?	No	No	NA	0
Pini Polonia	Poland	Meat	✗	✗	✗	?	?	Yes	No	NA	0
2Sisters Food Group	UK	Meat	NR	NR	NR	NR	NR	NR	NR		NR
Animex Foods	Poland	Meat	NR	NR	NR	NR	NR	NR	NR	NA	NR
Atria	Finland	Meat	NR	NR	NR	NR	NR	NR	NR	NA	NR
Bernard Matthews	UK	Meat	NR	NR	NR	NR	NR	NR	NR		NR
Cedrob	Poland	Meat	NR	NR	NR	NR	NR	NR	NR	NA	NR
Danish Crown	Denmark	Meat	NR	NR	NR	NR	NR	NR	NR		NR
Farmutil HS	Poland	Meat	NR	NR	NR	NR	NR	NR	NR	NA	NR
Fermy Drobiu Woźniak	Poland	Eggs	NR	NR	NR	NR	NR	NR	NR	NA	NR
Groupe Doux	France	Meat	NR	NR	NR	NR	NR	NR	NR		NR
Interovo Egg Group	Netherlands	Eggs	NR	NR	NR	NR	NR	NR	NR		NR
Kwetters Holding	Netherlands	Eggs	NR	NR	NR	NR	NR	NR	NR		NR
LDC	France	Meat	NR	NR	NR	NR	NR	NR	NR		NR
Moy Park	UK	Meat	NR	NR	NR	NR	NR	NR	NR		NR
Moy Park France	France	Meat	NR	NR	NR	NR	NR	NR	NR		NR
Munax	Finland	Eggs	NR	NR	NR	NR	NR	NR	NR	NA	NR
Noble Foods	UK	Meat	NR	NR	NR	NR	NR	NR	NR		NR
Renmans	Belgium	Meat	NR	NR	NR	NR	NR	NR	NR	NA	NR
Sokołów	Poland	Meat	NR	NR	NR	NR	NR	NR	NR	NA	NR
Terrena-Gastronome	France	Meat	NR	NR	NR	NR	NR	NR	NR		NR
Tican	Denmark	Meat	NR	NR	NR	NR	NR	NR	NR		NR
Triskalia	France	Meat	NR	NR	NR	NR	NR	NR	NR		NR
Van Rooi Group	Netherlands	Meat	NR	NR	NR	NR	NR	NR	NR		NR
Viangro	Belgium	Meat	NR	NR	NR	NR	NR	NR	NR	NA	NR

*In some cases the total volumes, and therefore the % of certified soy, are estimated

ANALYSIS: MEAT AND EGG PROCESSING COMPANIES

This sector is trailing behind retailers and manufacturers on the road to responsible soy.

36 companies assessed, 13 responded

4 companies have committed to using 100 per cent responsible soy

9 companies have reported using a total of 309,000 tonnes of responsible soy

4 companies have committed to "no deforestation" for soy

8 respondents are RTRS members

Supplying mostly unbranded products to retail and food service companies, the companies in this sector are unknown to most consumers.

Lack of consumer pressure can in part explain why this sector as a whole lags behind both retailers and processed food manufacturers (including the dairy brands) on the journey to responsible soy.

Which companies are performing well?

Only five companies are "leading the way" or "well on the path", such as Swedish company **Kronfågel** (a subsidiary of Scandi Standard), **HKScan (Finland)** and its subsidiary **HKScan Sweden**.

The Dutch companies that have reported have hardly moved from their starting position of 2014, with low scores (partly caused by no disclosure of soy footprint). **Gebr. van Beek Group** – the only egg company to report – is a positive exception with 50 per cent of its soy use certified.

Which companies need to do more?

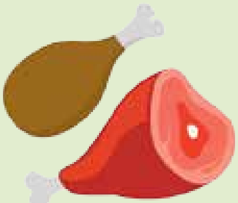
The meat and egg sector has the highest proportion of non-respondents, with just over one-third of the companies (13 out of 36) responding.

Almost all meat and egg companies from Denmark, the UK, France and Belgium failed to respond, including major international companies like **Danish Crown, Groupe Doux** and **Moy Park** (a subsidiary of Brazilian company JBS). If these non-respondents have a policy on soy, they do not appear keen to share it publicly.

Though not yet "in the starting blocks", **Belgian Pork Group** and **Pini Polonia** at least reported.

Commitments to responsible soy

Just 10 meat and egg companies (eight respondents, two non-respondents) in the Scorecard are RTRS members – a disappointing number considering how important these companies are in the soy supply chain.



THE MEAT AND EGG SECTOR HAS THE LOWEST PROPORTION OF RESPONDENTS COMPARED TO THE OTHER SECTORS

Commendably, four companies (31 per cent of respondents) made commitments to responsible, deforestation-free soy – but this is nowhere near enough. 10 of the respondents (77 per cent) calculated their total soy volume and shared it with WWF, reporting a total volume of 0.7 million tonnes. Nine reported using a total of 309,000 tonnes of responsible soy.

The business model of this sector is based on animals fed with cheap, rather than responsible, soy. However, the retailers and brands they supply are increasingly becoming aware of the issues and are starting to ask for soy that is produced responsibly. Forward-thinking companies should be prepared to meet their customers' demands for responsible soy.

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Soy is embedded in most of the meat we eat.

RESULTS
FEED COMPANIES

Total soy use

SMALL: 50,000 tonnes of soy/yr
MEDIUM: 50,000 – 100,000 tonnes of soy/yr
LARGE: 100,000 – 500,000 tonnes of soy/yr
EXTRA LARGE: 500,000+ tonnes of soy/yr

leading the way
well on the path
started the journey
not yet in the starting blocks
non-respondent

Company	Country of HQ	Sector	RTRS or PT member	Responsible soy commitment	'No deforestation' commitment	Total soy use*	Volume of responsible soy used	GM policy	Additional strategies	Status 2014	Score 2016
Raisio Group	Finland	Feed industry	RTRS	✓ BY 2015	✓ BY 2015	Small	4,050 t	Yes	Yes	NA	23
Lantmännen	Sweden	Feed industry	RTRS	✓ BY 2015	✓ BY 2015	Large	114,500 t	No	Yes		21
BioMar	Denmark	Feed industry	RTRS	✓ BY 2020	✓ BY 2020	Large	74,500 t	Yes	No		15.5
De Heus Group	Netherlands	Feed industry	RTRS	✓ BY 2015	✓ BY 2015	Extra large	121,500 t	Yes	No		13
Cooperl	France	Feed industry	RTRS	⊗	⊗	Large	31,000 t	Yes	Yes		8
ForFarmers	Netherlands	Feed industry	RTRS	⊗	⊗	Extra large	234,000 t	Yes	Yes		6.5
Groupe Avril	France	Feed industry	RTRS	⊗	⊗	Large	48,000 t	Yes	Yes		6.5
Nutreco	Netherlands	Feed industry	RTRS and ProTerra	⊗	⊗	Extra large	141,552 t	No	No		6.5
AB Agri (ABF)	UK	Feed industry	RTRS	⊗	⊗	Large	9,630 t	Yes	No		4.5
VanDrie Group	Netherlands	Feed industry	⊗	⊗	⊗	Small	100 t	No	No		2
Volac International	UK	Feed industry	⊗	⊗	⊗	Small	0	No	No	NA	1
Agrifirm	Netherlands	Feed industry	NR	NR	NR	NR	NR	NR	NR		NR
Aveve	Belgium	Feed industry	NR	NR	NR	NR	NR	NR	NR	NA	NR
Carrs Billington	UK	Feed industry	NR	NR	NR	NR	NR	NR	NR	NA	NR
Danis	Belgium	Feed industry	NR	NR	NR	NR	NR	NR	NR	NA	NR
Danish Agro	Denmark	Feed industry	NR	NR	NR	NR	NR	NR	NR		NR
DLG	Denmark	Feed industry	NR	NR	NR	NR	NR	NR	NR		NR
Golpasz	Poland	Feed industry	NR	NR	NR	NR	NR	NR	NR	NA	NR
Group Depre (Voeders Depre)	Belgium	Feed industry	NR	NR	NR	NR	NR	NR	NR	NA	NR
Hamlet Protein	Denmark	Feed industry	NR	NR	NR	NR	NR	NR	NR		NR
Hankkija	Finland	Feed industry	NR	NR	NR	NR	NR	NR	NR	NA	NR
Invivo	France	Feed industry	NR	NR	NR	NR	NR	NR	NR		NR
Le Gouessant	France	Feed industry	NR	NR	NR	NR	NR	NR	NR		NR
Svenska Foder	Sweden	Feed industry	NR	NR	NR	NR	NR	NR	NR		NR
Vanden Avenne	Belgium	Feed industry	NR	NR	NR	NR	NR	NR	NR	NA	NR
Versele-Laga	Belgium	Feed industry	NR	NR	NR	NR	NR	NR	NR	NA	NR
Wipasz	Poland	Feed industry	NR	NR	NR	NR	NR	NR	NR	NA	NR

*As most feed companies did report their total soy volumes to WWF, though chose not to disclose them publicly, WWF decided to indicate a company's soy volume within the context of volume categories

ANALYSIS: FEED COMPANIES

This sector is making disappointing progress in the journey toward responsible soy.

27
companies assessed, 11 responded

4
companies have committed to using 100 per cent responsible soy

10
companies have reported using a total of 779,000 tonnes of responsible soy

4
companies have committed to "no deforestation" for soy

9
respondents are RTRS members

Feed companies are largely invisible to consumers. Yet they trade most of the soy assessed in the Scorecard and have reported the highest volumes. Indeed, the feed sector handles three-quarters of the soy produced in the world.

However, on the whole, feed companies are not engaging well with the soy issue.

Which companies are performing well?

Lantmännen and **Raisio** are clearly leading the way, with **BioMar** and **De Heus Group** following. The feed sector has a relatively large group of companies that have "started the journey" – seven out of the 11 companies that responded (64 per cent) fit this category.

Which companies need to do more?

Fewer than half the companies contacted (11 out of 27) submitted information to WWF. It is particularly disappointing that the numerous non-respondents include major international industry players like **Agrifirm, Hamlet Protein, Danish Agro** and **DLG**. None of the Belgian and Polish feed companies reported.

Most feed companies claim to be following market demands, rather than taking responsibility for their own soy footprints. Some report a commitment to a small subset of purchase criteria for soy, including ensuring that the soy they source is legally produced (according to WWF, "legality" is not enough in and of itself to ensure sustainability.)

Commitments to responsible soy

MOST FEED COMPANIES CLAIM TO BE FOLLOWING MARKET DEMANDS, RATHER THAN TAKING RESPONSIBILITY FOR THEIR OWN SOY FOOTPRINTS

Nine feed companies (82 per cent of those that responded) are RTRS members, and all have submitted their annual progress reports to the organization. However, disappointingly, just four (36 per cent of respondents) have made sufficient commitments to responsible, deforestation-free soy.

All 11 feed companies that reported to WWF have calculated their soy footprint, though not all have disclosed it to WWF. Those that did disclose jointly use around 3 million tonnes of soy annually.

Feed companies buy soy directly from producers, so are ideally placed to take action and buy responsible soy. With the current low price of credits to support responsible soy production, there is no excuse for feed companies not to start sourcing responsible soy now.

Deforestation in the Cerrado to make way for soy fields.

ANALYSIS BY COUNTRY

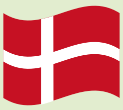
National commitments are a good incentive for joint and individual action on responsible soy. Many strong performers in the 2016 Scorecard are from countries that have made national commitments.

See how your country is performing on responsible soy:

Belgium

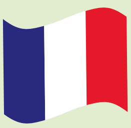
Belgium's results in general were poor, with just four out of 14 companies responding. This is particularly disappointing since the Belgian feed industry had previously made a strong commitment to RTRS soy which it seems not to have fulfilled. **Colruyt Group** is "well on the path", and **Delhaize** and **Vandemoortele** (who is very proactive on moving to responsibly-produced soy oil) have "started the journey" for embedded soy.

Denmark



Denmark, as an important exporter of meat, is lagging behind, with many major players such as **DLG**, **Danish Agro**, **Hamlet Protein** and international meat company **Danish Crown** failing to report to WWF. Some Danish companies referred to their own criteria on soy sourcing, but theirs do not exclude deforestation. Honourable exceptions were dairy company **Arla Foods** and fish feed company **BioMar,** who are "leading the way" and "well on the path" respectively.

France



In France, there was individual progress from **Bel Group, Carrefour, Danone** and two companies with a soy footprint in feed, **Groupe Avril** and **Cooperl**. However, major retailers like **Auchan** and **Les Mousquetaires/Intermarché** and all meat companies again failed to respond, despite probably having an enormous soy footprint.

Finland

Finland, a newcomer in the WWF Soy Scorecard, showed some good results, notably **Raisio Group** and **HKScan**. In February 2016, during the Scorecard reporting period, four major industry players (**Kesko, Arla Finland, HKScan Finland** and **Unilever Finland**), in cooperation with WWF-Finland, launched a Finnish soy commitment. Members have pledged to use 100 per cent RTRS or ProTerra soy in all their private label products by 2020, and are inviting others to join them.

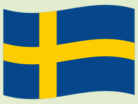
Netherlands

In the Netherlands, retail and dairy companies (**Albert Heijn**, **Jumbo Supermarkten**, **Superunie** and **FrieslandCampina**) reported almost 100 per cent responsible soy in 2015. Some other Dutch companies are progressing. Unfortunately, most feed, meat and egg companies backed out of an earlier national commitment to achieve 100 per cent RTRS for all Dutch soy use by 2015 and have stayed in the starting blocks.

Poland

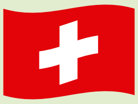
In Poland, responsible soy production is clearly new on the agenda. WWF made strong efforts to reach out to companies, but only two responded, **Pini Polonia** and **Grupa MLEKOVITA**. As Poland is a large user of soy, there is a strong need to raise awareness and urge companies to start the journey to responsible soy.

Sweden



In Sweden, companies that signed up to the Swedish Soy Dialogue have achieved 100 per cent responsible soy. However, some Swedish companies have not made such commitments and/or declined to respond including **Svenska Foder** and **IKEA**.

Switzerland



In Switzerland, members of Soy Network Switzerland (such as supermarket chains **Migros** and **Coop**) were not scored, but assessed collectively: they are among the leading performers globally, sourcing 94 per cent responsible soy. Disappointingly, **Nestlé**, which is not part of the network, did not respond, though as the world's biggest dairy company its (embedded) soy footprint is likely to be substantial.

UK

The UK included two of the good performers in **Waitrose** and **Marks & Spencer**. It has a large group of companies (12) that have "started the journey". 10 UK companies did not respond, including meat company **Moy Park** and **Brakes**, a large international food service company. Five years after the successful WWF-UK "Save the Cerrado" campaign, this is a disappointing picture.

RECOMMENDATIONS

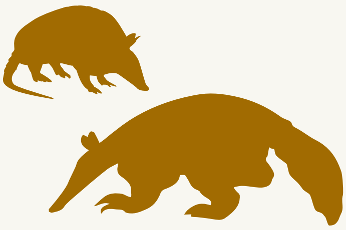
Companies, consumers and governments need to take action now on responsible soy.

What should companies do?

All companies that use soy have a responsibility and a role to play in helping to reduce the negative environmental and social impacts of its production.

By 2020 at the very latest, WWF asks companies to make sure their soy supply chains:

- Are 100 per cent free from deforestation and conversion of natural habitats
- Come from environmentally and socially responsible soy production
- Are fully certified by a credible, transparent, multi-stakeholder scheme for environmentally and socially responsible soy production, such as RTRS or ProTerra.



ALL COMPANIES THAT USE SOY HAVE A RESPONSIBILITY AND A ROLE TO PLAY IN HELPING TO REDUCE THE NEGATIVE ENVIRONMENTAL AND SOCIAL IMPACTS OF ITS PRODUCTION

These asks should apply to both soy used for direct human consumption and soy embedded as animal feed.

To implement these commitments, companies need to develop transparent timebound plans, including actions such as:

- Calculating and publishing soy use, both direct and embedded
- Mapping soy supply chains and the environmental risk related to them
- Defining ambitious and concrete steps to purchase RTRS- or ProTerra-certified soy, or animal products based on RTRS- or ProTerra-certified soy
- Starting to buy credibly certified soy as soon as possible – buying RTRS credits is a good first step
- Asking suppliers and peers to take similar steps
- Joining or initiating national initiatives on responsible soy to create momentum in the market
- Supporting programmes to help producers implement Better Management Practices and achieve certification
- For non-GM soy, choosing and supporting development of RTRS non-GM or ProTerra production and supply chains (when buying ProTerra-certified soy, ask for improvement of governance and verification)

IT'S VITAL THAT CONSUMERS VOICE THEIR CONCERNS AND PUSH COMPANIES TO MOVE FORWARD ON MAKING DEFORESTATION-FREE COMMITMENTS AND USING RESPONSIBLE SOY

- Exploring ways of reducing food waste and reducing consumption of animal products
- Exploring responsibly-produced and locally-grown alternatives to imported soy.

In addition to these individual commitments, companies should actively engage in industry initiatives that are seriously and urgently working to transform the soy sector.

These include the:

- Amazon Soy Moratorium
- New York Declaration on Forests
- Consumer Goods Forum resolution on zero net deforestation.

To implement these, companies should:

- Commit to exclusively buy from traders/companies that can demonstrate they are implementing their commitments on zero deforestation and zero conversion of other natural habitats
- Work with these initiatives and other stakeholders to expand commitments to eliminating deforestation and conversion of South American savannahs such as the Chaco and the Cerrado, as well as Northern American prairies (natural grasslands)
- Influence national and international policies to enable and support private commitments on zero deforestation and zero conversion of other natural habitats.

End users should:

- Individually ask their direct suppliers to source responsibly
- Collectively demand that traders set up systems on the ground to exclude deforestation/conversion from their entire supply chains.

What should consumers do?

It's vital that consumers voice their concerns and push companies to move forward on making deforestation-free commitments and using responsible soy. Their actions can help save some of the world's most vital forests and ecosystems, and the people and species that depend on them.

Consumers should:

- Ask retailers and brands to commit to responsibly-produced, deforestation- and conversion-free soy throughout their supply chains
- Choose animal products from companies that have committed to and started buying RTRS-certified soy
- If concerned about GM soy, ask retailers about RTRS-certified non-GM soy or ProTerra
- Consider reducing their consumption of meat, eggs and dairy products in favour of vegetable proteins – for many people, this will result in a diet closer to health recommendations
- Reduce food waste by planning their shopping and meals carefully – only buy and prepare as much as is necessary.

What should governments do?

Governments have an important role to play in halting deforestation and conversion of natural habitats, both in producer countries and in consumer countries.

What should governments in producer countries do?

- Set a strong legislative and policy framework that halts deforestation and conversion of natural habitats before 2020, while ensuring the proper implementation of existing and future laws.
- Support public-private partnerships aiming to halt conversion of natural ecosystems to soy production.
- Apply integrated land-use planning, especially for agriculture commodities such as soy.
- Sign and implement the New York Declaration on Forests within its given timeframe.
- Adhere to the OECD agriculture guidance.

GOVERNMENTS SHOULD DEVELOP AND IMPLEMENT EFFECTIVE LEGISLATIVE AND POLICY FRAMEWORKS ENSURING THAT ONLY RESPONSIBLE, DEFORESTATION- AND CONVERSION-FREE SOY IS ENTERING THEIR MARKETS

- Be an active advocate globally for deforestation-free and conversion-free commodities, as one element to implement the Paris Agreement on Climate Change and the Sustainable Development Goals.

What should governments in consumer countries do?

- Develop and implement effective legislative and policy frameworks ensuring that only responsible, deforestation- and conversion-free soy is entering their markets by 2020 at the latest.

- EU countries specifically should:
  - Support the development of measures to halt deforestation and forest degradation, such as the EU Action Plan on Deforestation and Forest Degradation, and to address the EU's impact beyond its borders.
  - Sign and implement the Amsterdam Declaration Towards Eliminating Deforestation from Agricultural Commodity Chains with European Countries.

- Review policies, subsidies and overseas development aid to promote conversion-free soy and remove harmful incentives that may promote irresponsible or even illegal soy.

- In public procurement policies, include criteria that exclude all soy coming from conversion in meat, dairy, eggs, fish and other products that contain (embedded) soy.

- Sign and implement the New York Declaration on Forests within its given timeframe.

- Advocate globally and in international fora for deforestation- and conversion-free commodities and responsible markets, as one element to implement the Paris Agreement on Climate Change and the Sustainable Development Goals.

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

ANNEX: WHAT ELSE IS WWF DOING TO CURB THE NEGATIVE IMPACTS OF SOY?

While sourcing certified soy is vital for companies to make their soy supply chain more responsible, WWF also supports a number of complementary strategies.

WWF IS COLLABORATING WITH DIVERSE GROUPS, FROM NATIONAL GOVERNMENTS TO BANKS INVESTING IN SOY, ON MANY INITIATIVES ALL AIMED AT MAKING SOY PRODUCTION MORE RESPONSIBLE

WWF is collaborating with diverse groups, from national governments to banks investing in soy, on many initiatives all aimed at making soy production more responsible. Companies can play a vital role in supporting these strategies, which include:

Influencing producer country legislation and encouraging integrated land-use planning: In several countries WWF is trying to halt the irresponsible expansion of soy and other agricultural production by encouraging governments to introduce policies to conserve forests and native vegetation. For example, in Paraguay WWF has supported extension of the moratorium on forest conversion of the Atlantic Forest. In Brazil, WWF is supporting rigorous implementation of the Forest Code, which calls for reforestation and restoration of previously cleared forests.

WWF promotes transparent, systematic planning processes for balancing different land uses with conservation of natural environments. In Brazil, for example, WWF and other civil society organizations work with the government and the private sector on Systematic Conservation Planning – a science-based approach that looks at land use within the context of the whole biome.

Influencing consumer country legislation and regulations: In several countries, WWF works with governments to develop legislation or other mechanisms to ensure soy imports are responsible and deforestation-free. At the EU level, WWF is part of a coalition of NGOs lobbying for a thorough and robust EU Action Plan on Deforestation and Forest Degradation.

Promoting Better Management Practices (BMPs): BMPs can help farmers improve soil health and productivity, reduce the use of inputs such as agrochemicals and water, and mitigate negative environmental impacts. In Mato Grosso, Brazil, WWF works with soy farmers to improve their production practices, resulting in a first group of farmers achieving RTRS certification in 2015. In Brazil, WWF also promotes the expansion of soy production on low productivity pastures.

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

FINANCIAL MARKETS CAN HELP TO SHAPE THE FUTURE OF THE SOY INDUSTRY BY DIVERTING CAPITAL AWAY FROM PROJECTS THAT THREATEN NATURAL ECOSYSTEMS TOWARD SUSTAINABLE PRODUCTION AND CONSUMPTION

Promoting maintenance of High Conservation Values (HCVs): WWF actively supports the HCV Resource Network and the use of specially licensed HCV assessors. The six HCVs cover a broad array of conservation priorities including biological, ecological and cultural values.

Promoting consumer country initiatives: WWF is influencing stakeholders to make national commitments and set deadlines to use 100 per cent responsible soy, resulting in initiatives in Switzerland, the Netherlands, Sweden and recently Finland (see page 41).

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

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

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

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

ANNEX: MULTI-STAKEHOLDER SOY INITIATIVES

Formed in 2006, the Round Table on Responsible Soy offers a globally applicable standard for responsible soy. ProTerra's standard focuses on non-GM soy only.

Round Table on Responsible Soy

RTRS is a multi-stakeholder initiative whose members include soy producers and traders, environmental and social NGOs, finance institutions, manufacturers and retailers and companies in the feed industry. It has more than 190 members from 25 countries.

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

RTRS HAS MORE THAN 190 MEMBERS FROM 25 COUNTRIES

The RTRS standard, which has been formulated through a rigorous, transparent, multi-stakeholder process, bans the conversion of native forests and non-forest habitat such as grasslands and wetlands of high conservation value. It also demands legal compliance, conservation and, where needed, restoration of riparian vegetation areas and respect for land tenure claims. It promotes Better Management Practices and ensures fair working conditions too. During 2015 and 2016 RTRS is engaged in the first review of its standard. RTRS also encourages chain-of-custody certification along the supply chain to make sure claims about products containing responsible soy in the marketplace can be verified.

Producers have been certified in Brazil, Paraguay, Argentina, Uruguay, the United States, Canada, China and India. In 2015, RTRS certified over 2.3 million tonnes of soy, an increase of 62 per cent on the previous year. Market uptake also increased, to 2.3 million tonnes (a 74 per cent increase), of which 2.1 million came from credits[7]. Though demand and production seem to be "in balance", producers have reported having significant potential to scale up production if demand continues to increase.

WWF is a member of RTRS and is committed to working within it to strengthen its criteria and to increase the market uptake for responsible soy. WWF sits on the Executive Board, as well as in a number of Task Forces and Working Groups. As a partner, we retain the right to criticize the platform when we feel it is necessary.

For companies that buy and use soy, RTRS can offer them the assurance that the products they sell are supporting responsible soy production, thereby reducing reputational risk and providing an option for market differentiation.

7 Information from www.responsiblesoy.org and provided by RTRS.

RTRS also includes a separate line for non-GM soy. While WWF doesn't promote or endorse genetic modification, the fact remains that GM soy makes up around three-quarters of all soy produced globally, and even higher proportions in North and South America. Engaging with GM soy producers is critical if we're to reduce the impacts of soy production at a scale that matters.

ProTerra

ProTerra FOUNDATION

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

ProTerra's standard is comparable to RTRS, but WWF believes the scheme's governance, transparency and level of assurance need to improve. The standard offers a label, which may be used in the consumer market. Volumes of ProTerra-certified soy have declined in previous years. In 2015 however, purchases increased by 28 per cent to 3.6 million tonnes[8].

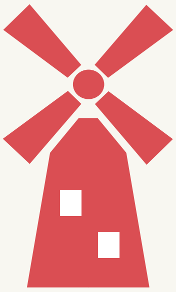
Whole soybeans.

8 Information provided by ProTerra.

ANNEX: PROGRESS ON NATIONAL COMMITMENTS

There are opportunities and challenges related to national commitments.

The Netherlands



Dutch companies are significant users of soy, not only for consumption within the country but also in their international operations. Two-thirds of the soy used for feed is later exported as animal products. Internal use of soy totals around 2.4 million tonnes[9]. Meanwhile the Netherlands is a major trader of soy with an annual turnover of around 8.7 million tonnes.

In 2011, all parts of the Dutch soy supply chain committed to source 100 per cent RTRS soy or equivalent for total production of animal products in the Netherlands by 2015. Meanwhile, the Dutch Sustainable Trade Initiative (IDH) committed to invest in projects to help farmers in South America reach RTRS certification.

In 2013, 417,116 tonnes of RTRS-certified soy was purchased by the Initiative. In 2014, however, most Dutch feed and meat companies backed out of the Dutch soy commitment for their full (national) volumes, in order to follow market demand. In 2014, RTRS credits purchased totalled 252,000 tonnes[10].

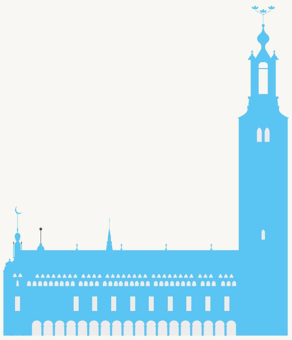
In 2015, the whole Dutch dairy sector and the Dutch retailers kept their promises. Those assessed reported reaching 100 per cent responsible soy, a total of 530,355 tonnes. The total volume of certified material reported to be used by the Dutch feed companies was just below 500,000 tonnes. Dutch feed industry association Nevedi recently reported a total purchase of 823,000 credits in 2015[11].

Finland

In February 2016 four major industry players (Kesko, Arla Finland, HKScan Finland and Unilever Finland) initiated the Finnish soy commitment in cooperation with WWF-Finland. The members of the commitment pledge to ensure that all the soy used in the production chain of their private label products will be responsibly-produced, and either RTRS- or ProTerra-certified, by 2020. The Finnish soy commitment is an open group and the founding members of the commitment challenge other Finnish operators to join in.

9 *Soy Barometer 2014*. A research report for the Dutch Soy Coalition.
10 CBS. https://www.cbs.nl/nl-nl/economie/landbouw/monitor-duurzame-agro-grondstoffen/grondstoffen/soja.
11 Nevedi. https://www.nevedi.nl/nieuws/nieuwsoverzicht/nieuwsbericht/?newsitemid=7516946441.

Sweden



The Swedish Soy Dialogue is a network of Swedish agriculture producers, feed companies, food producers, retailers, sector organizations and WWF. The network aims to raise awareness about soy production issues and driving sustainability in soy production. In 2014 the participating companies voluntarily committed to ensure that soy used for feed which is embedded in the meat, fish, poultry, egg and dairy products they use should be certified against the ProTerra or RTRS standards by 2015. The commitment covers all Swedish products and imported products from the companies' own brands.

By March 2016 all the signatory companies had reported that they had fulfilled their commitment for 100 per cent for 2015 (represented in the Scorecard).

Currently the Swedish Soy Dialogue has 29 signatories and it will welcome new members.

Some of the companies that are multinational have also made commitments to responsible soy for global operations, such as Arla and HKScan Sweden's mother company HKScan in Finland.

Soy Network Switzerland

Switzerland is the most advanced market for responsible soy. Its sustainability efforts are spearheaded by Soy Network Switzerland, a joint venture formed in 2011 that was established as an association in May 2016, consisting of 19 main players from the Swiss agriculture and food industries, including Switzerland's biggest retailers.

Soy Network Switzerland was formed to promote the production and marketing of responsibly-produced soy. It aims to ensure that a minimum of 90 per cent of soy used in animal feed in Switzerland is certified as segregated responsible and GM-free (i.e. RTRS non-GM, ProTerra, Bio Suisse, Danube Soy or Europe Soya certification schemes).

In 2015, 94 per cent of all soy imported for feed in Switzerland was certified according to one of these schemes (285,108 tonnes).

Soy is a major ingredient of feed for chickens.

© DUTCHSCENERY/SHUTTERSTOCK.COM

ANNEX: THE AMAZON SOY MORATORIUM

The Amazon Soy Moratorium has helped to prevent the trade of soy from recently deforested areas of the Amazon since 2008.

IN MAY 2016 THE PARTICIPATING ORGANIZATIONS ANNOUNCED A RENEWAL OF THE MORATORIUM, THIS TIME WITHOUT AN END DATE

Established in 2006, after advocacy from NGOs and pressure from consumers, the Soy Moratorium is a compromise solution by ABIOVE (Brazilian Vegetable Oil Industry Association) and ANEC (Brazilian Grain Exporters Association) and their respective member companies, which pledged not to trade soy from converted areas within the Amazon biome after July 2006 (later changed to 2008 to align with the Forest Code).

Several NGOs support the initiative, including Greenpeace and WWF. It also has the broad support of a group of companies, including McDonald's, and major European retailers such as Tesco and Carrefour.

The Moratorium is a commitment to zero conversion of native vegetation, encompassing forests but also non-forest ecosystems that occur in the Amazon Biome – such as savannahs, grasslands, and wetlands. The results of the Moratorium have been encouraging, as monitoring has shown that between the 2007-8 and 2014-15 harvests, less than 1 per cent of soy cultivated in the Amazon was in recently deforested areas. However, companies should note that the Moratorium has erroneously also been used to promote the image of all Brazilian soy as "deforestation-free", while the Cerrado is the Brazilian biome under the most pressure from soy expansion. According to Brazil's Environmental Ministry, 50 per cent of the Cerrado has already been cleared for crops, livestock and other uses.

In May 2016 the participating organizations announced a renewal of the Moratorium, this time without an end date, and committed to broaden the agenda, including other responsible agreements that will go beyond the zero conversion purchasing criteria.

ANNEX: CGF "ZERO NET DEFORESTATION" RESOLUTION

The Consumer Goods Forum is pushing for zero net deforestation by 2020.

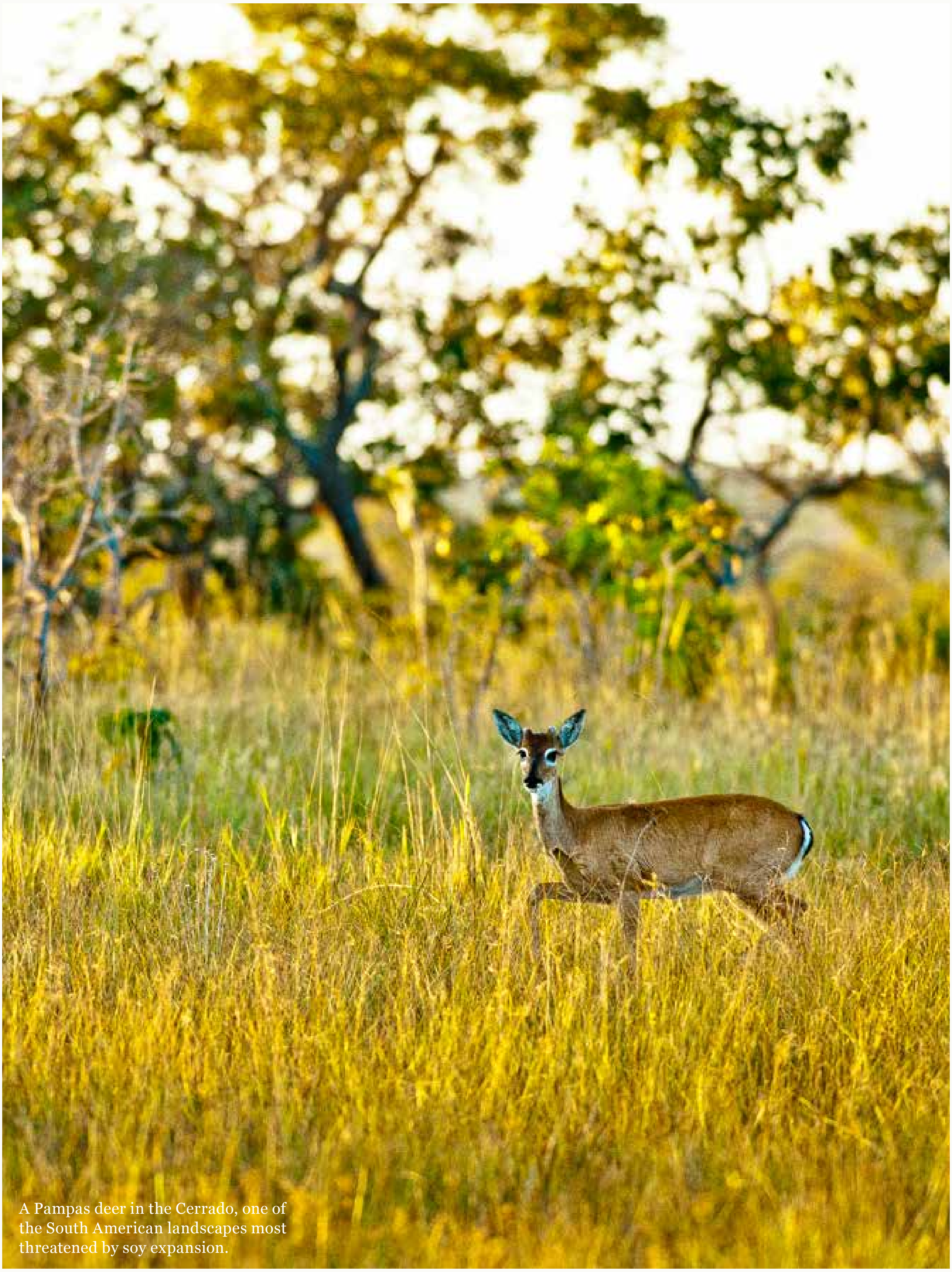
WHILE MANY CGF MEMBERS PUBLICLY COMMIT TOWARD ZERO NET DEFORESTATION FOR PALM OIL OR PULP AND PAPER, ONLY A SMALL GROUP OF MEMBERS HAS COMMITTED WITH REGARD TO THEIR SOY USE

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

In November 2010, the CGF Board announced a Resolution on Deforestation, including a pledge to mobilize resources within its respective businesses to help achieve zero net deforestation by 2020, with a focus on the sourcing of key commodities – palm oil, soy, paper and pulp, and beef. This will be achieved both by individual company initiatives and by working collectively in partnership with governments and NGOs. While many CGF members publicly commit toward zero net deforestation for palm oil or pulp and paper, only a small group of members has committed with regard to their soy use.

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

The CGF's Soy Working Group is currently working on setting sourcing guidelines for responsible soy.


A Pampas deer in the Cerrado, one of the South American landscapes most threatened by soy expansion.

© BENTO VIANA/WWF

WWF SOY SCORECARD 2016

BIODIVERSITY

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

BIOCAPACITY

It takes 1.5 years for the Earth to regenerate the renewable resources that people use, and absorb the CO_2 waste they produce in that same year.

EQUITABLE SHARING

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

BETTER CHOICES

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

INT

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

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