



Prepared for the UK Roundtable on Sustainable Soya

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Note: this report was revised in November 2022, to correct a minor error in the executive summary.

Executive Summary

The UK Roundtable on Sustainable Soya was first convened in 2018, following concerns that the production of soya for UK consumption was contributing to the loss of forests and other native vegetation in soy producing countries, with impacts both on the environment, people and planet. In particular concerns were focused on the protection of important landscapes such as the Cerrado in Brazil and the Gran Chaco in Argentina, as most of the UK's soya is produced in South America.

Roundtable members recognise that 'sustainable' sourcing includes a broad range of environmental, social and economic factors but took the decision from the outset to focus efforts on deforestation and conversion, building on industry momentum and recognising this as a time sensitive need for change. Since its inception the Roundtable has been a convening space for industry to share lessons across the supply chain and where Government can present proposals and updates, including recent developments in legislation to obligate some companies to complete due diligence on commodity supply chains to ensure legality. This report summarises the progress of the UK towards resilient, sustainable soya supply chains. In 2021, the UK imported 2.5 million tonnes of soybean meal equivalents, a 6% year on year decrease. Compared to 2020, the UK imported considerably more soya from Paraguay, increasing by 45% in 2021. Similarly, India (33% increase) and the USA (24% increase) have also seen enhanced volumes in comparison to the previous year. However, both Argentina, Canada and European production have decreased. Though these may appear significant changes, when considering imports over five years there is overall a strong level of consistency. For example, Argentina remains around 42-45% over the Roundtable reporting period, we perhaps see the greatest level of variation between Brazil and the USA, which is to be expected given that both countries are the top global producers and have been significantly impacted by trade policy between the USA and China, but even these only vary by 5-10% over the five-year reporting period shown.

As well as direct soya imports, this report also analyses the UK's imports of 'embedded' soya, where the UK consumes meat or dairy products (amongst others) reared in other countries. This year the UK's imports of embedded soya grew by 6% to close to 800,000 tonnes. While some sectors such as dairy have seen a decline in imports, which AHDB suggests may be a result of changes to trade regulation following Brexit, other sectors such as pork have seen an increase. This may be due to the competitive pricing of European pigs associated with a lower cost of production compared to those reared in the UK. UK pig farmers have been under sustained pressure due to a shortage of labour in the processing sector initially and then latterly high input costs, which have then been exacerbated by the invasion of Ukraine by Russia. AHDB report that this could lead to rising imports of pork in the future, as the UK's sow herd declines.

Using the national import data, and the information provided by UK Roundtable members regarding uptake of certification, we estimate approximately 34 % of the UK's soya used in animal feed is physically deforestation and conversion free and a further 30% is covered by a sustainability standard with criteria preventing deforestation and conversion driven by soy production, If the FEFAC risk methodology were to be applied to the unallocated volume remaining, the estimated level of deforestation and conversion risk varies between 17% and 1.7% subject to country of origin.

Each year, Roundtable members complete a 'Matrix of Progress' questionnaire, where they are asked to report on progress against their commitments. In this the fifth year of reporting it is possible to see the significant progress made by Roundtable members in this time. Since the initial baseline report in 2018, the number of companies with a policy in place has increased by 26%, and those with existing policies have since strengthened them to be aligned with the Roundtable goal. In addition, there has been an increase in the number of Roundtable members with an action plan in place, increasing from 30% of members to 80%.

Beyond the quantitative data, it is important to acknowledge the efforts being made by companies across the UK's soya supply chain, both to learn more about where the UK's soya originates, but also to engage suppliers and move beyond purchases of credit-based certification towards gathering greater assurance of the soya physically entering the UK. This work can be seen in the national uptake of sustainable soya, which steadily grew as companies successfully created policies and purchased credits to support soy farmers in line with their consumption, but which has plateaued over the past three years.

Challenges remain when creating action plans, with many companies reporting that without collaborative working and shared solutions it will be challenging to achieve physical flows on an individual company basis. Industry now needs additional support to transition to more physical assurance that soya is verified to be deforestation and conversion free. As industry awaits further information on incoming due diligence regulation, the year to come is one where we must create shared solutions to these challenges, building on the strong foundation of work achieved between 2021 and 2022 and create and operationalise practical solutions for the UK market. This can only be achieved by working collaboratively both in the UK and with other markets to help all soya users to make progress.

1 Introduction

The UK Roundtable on Sustainable Soya (UKRT) was first convened in March 2018 and is funded by the UK Government through the Partnerships for Forests programme. This followed the success of the UK Roundtable on Sourcing Sustainable Palm Oil which was created in 2012.

Each year, Efeca as secretariat of the Roundtable produces this Annual Progress Report (APR), summarising the UK's progress towards the goal of the Roundtable (i.e., uptake of legal, deforestation and conversion free soya). This report relates to the UK's use of soya in 2021 where, like last year's report we recognise the challenging circumstances industry has faced as a result of the continuing impact of the Covid-19 pandemic, rising energy prices and Brexit.

These challenges have resulted in logistical challenges (shortage of hauliers), price increases on input costs (e.g., bedding, feed, fuel) and pressures from lower cost product imports (as a result of lower costs of production). Similar to last year, we as the Secretariat has been acutely aware that many member companies have needed to focus on maintaining supply chains to meet customer demand. Despite these challenges, UK industry has continued to remain engaged and make strong progress, as this report shows.

1.1 What is the UK Roundtable on Sustainable Soya?

UK industry requested the Roundtable be established in 2018, due to concerns that the production of soya for UK consumption was contributing to the loss of forests and other native vegetation in soy producing countries, with impacts both on the environment, including loss of biodiversity and carbon sequestration benefits, and on local communities. There were particular concerns around the protection of important landscapes such as the Cerrado in Brazil and the Gran Chaco in Argentina, as most of the UK's soya is produced in South America.

Roundtable members acknowledge that soya production is not the only driver of deforestation (activities such as timber harvesting, cattle ranching, and land speculation are also significant contributors), but are mindful of the anticipated future increase in global demand for soya. It is estimated that the UK's demand for soya could equal a production area of 1.2 million hectares (an area nearly the size of Northern Ireland at 1.4 million hectares).¹

Roundtable members recognise that a long-term view of what 'sustainable' soya looks like should consider a much broader range of environmental, social, and economic factors beyond deforestation, and the need to consider other levers for change including meat reduction in diets and alternative protein sources for animal feed. However, the decision was taken by members from the outset to focus efforts on deforestation and conversion, building on the momentum from industry to act in this space. As well as industry momentum, the past year has also seen the development of legislative demands on companies from the UK and European governments, alongside action in the USA. These new regulations will require companies to demonstrate due diligence regarding deforestation and conversion within commodity supply chains. Increasingly, the work of the Roundtable is also linking into activities to reduce the

¹ <https://uksoymanifesto.uk/why-we-need-one/>

carbon footprint of businesses and mitigate climate change, connecting into a wide range of commodities beyond soya.

The Roundtable aims to facilitate discussions and action between soya users across the UK supply chain and beyond and is supported by a wider UK Sustainable Soya Initiative. The role of the Roundtable is to provide buyers and specifiers of soya in the UK with a platform to provide:

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

Through private-public collaboration, the Roundtable aims to support long term sustainability of agricultural industries in producing countries and a *mass market* move to secure, resilient supplies of sustainable soya to the UK and the UK livestock industry. Initially, Roundtable members aim to ensure all soya entering the UK is legally produced (to meet incoming due diligence obligations) and free from deforestation and conversion as a priority. A large focus of the UK Roundtable is on soya used in animal feed, as it is estimated that 90% of all soya imported by the UK is used as animal feed or embedded in imported meat, eggs, or dairy products.²

The Roundtable goal is as follows and was agreed by members of the UK Roundtable on Sustainable Soya following several working group meetings in 2018, this was then reviewed in November 2020.

“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:

- *sustainable resilient supplies of soya for the UK which are legal and cultivated in a way that protects against conversion of forests and valuable native vegetation; and*
- *help drive global mass market transition to sustainable supply chains.*

Roundtable signatories commit to publishing their own policies and timebound plans for achieving this goal within 6 months of joining the Roundtable and to publicly update on progress annually.

² https://www.wwf.org.uk/sites/default/files/2020-07/RiskierBusiness_July2020_V7_0.pdf

1.2 This report

The purpose of this report is to provide an update on progress towards meeting the goal of the UK Roundtable. This is the fifth progress report of the UK Roundtable and sets out our current understanding of the UK soya footprint in terms of volumes, source, and sustainability credentials at a national level, as well as progress made by UK industry towards the Roundtable's goal. This report uses the latest national publicly available data (calendar year 2021) and is supported by confidential industry information. For more information on the methodology behind this report, please see the annex.

As the fifth report in the series, the report will also reflect on the progress made over the past five years, exploring the impact of the Roundtable to date and considering where further action is needed to deliver on members shared ambition.

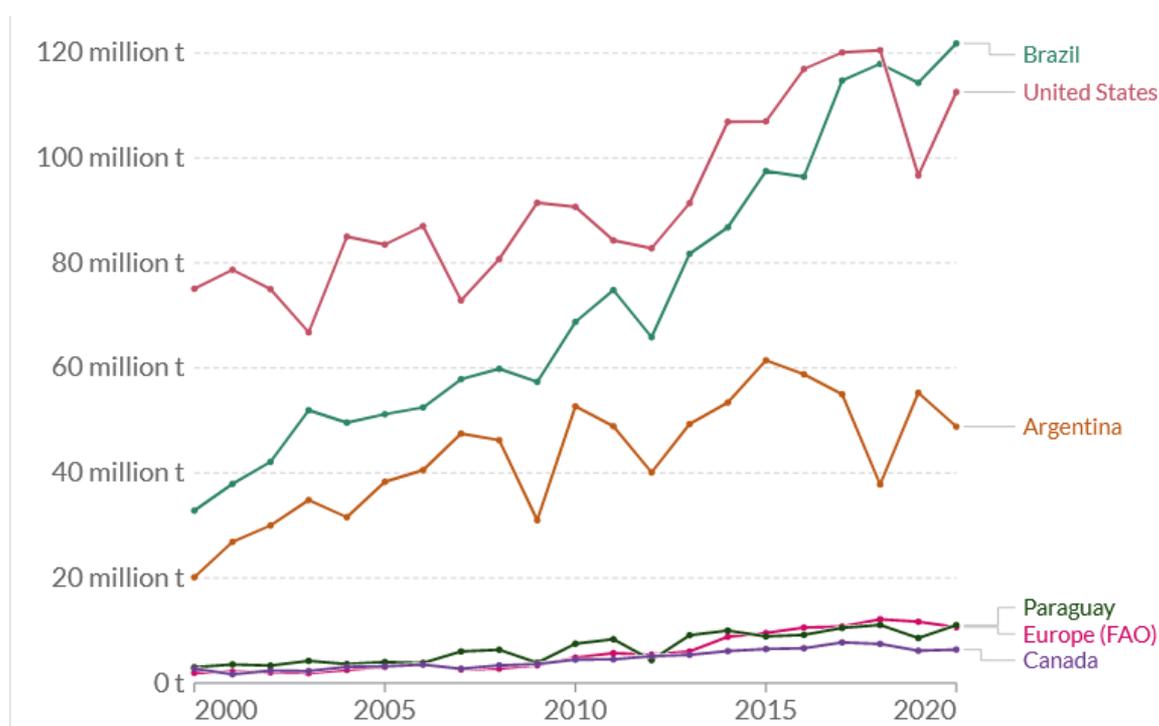
2 Overview of soya imports to the UK

When describing the UK’s consumption of soya, it is important to consider this within the context of global production and use.

2.1 Global soya production

Soy is a globally traded commodity and is valued for its use in animal feed as a key source of protein, and as a source of vegetable oil. The majority of the world’s soya (80%) is produced by three countries, Brazil, the USA and Argentina. since the 1950’s the global production of soy has increased 15 times over.³ Figure 1 shows clearly how production in the top three countries has increased significantly even since 2000, with Brazil increasing production four-fold.

Figure 1: Graph to show the growth in global soybean production (FAO)⁴

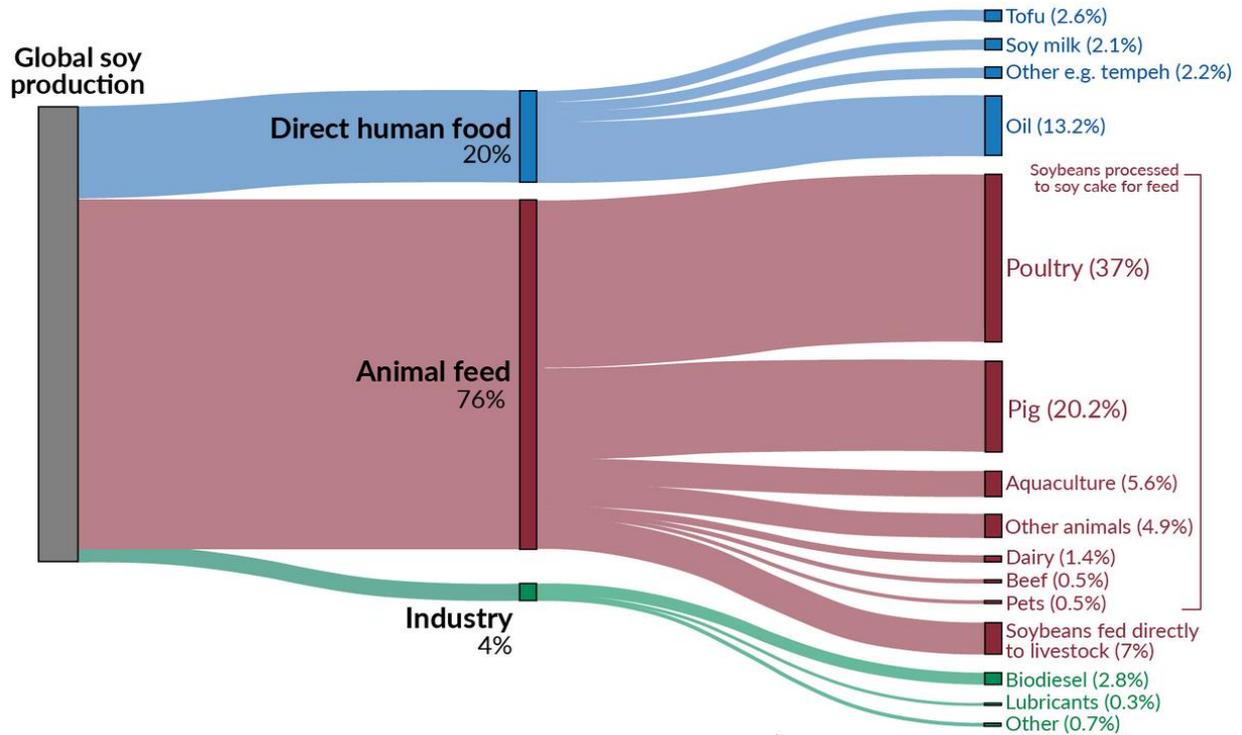


As shown in figure 2, soya is used for a number of reasons, but the vast majority (76%) is used in animal feed. The remaining soya is used directly as food for humans, usually as a vegetable oil (with similar uses to sunflower and rapeseed oil) but also as tofu and as a dairy milk alternative. Finally, a small amount (4%) is used for industrial purposes, such as fuel and paint.

³ <https://www.worldwildlife.org/industries/soy>

⁴ FAO via Our World in Data <https://ourworldindata.org/soy>

Figure 2: Graphic to show global uses of soya (FAO)⁵

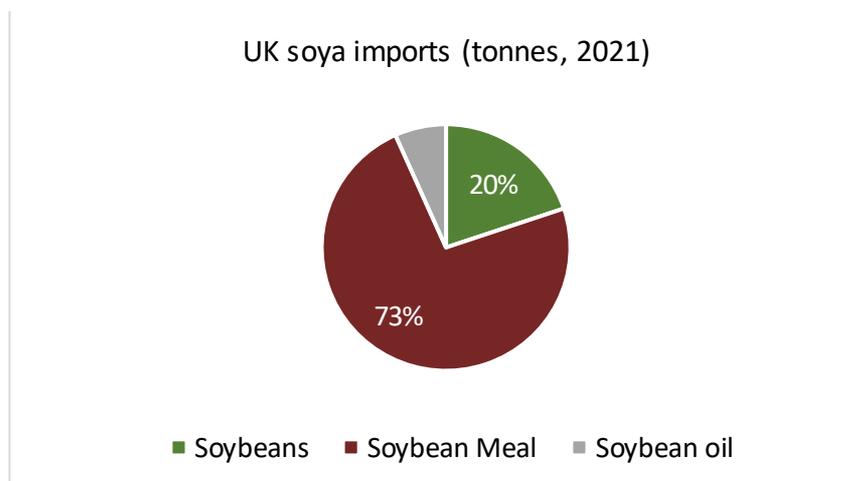


According to the European Soy Monitor report, 354 MMT of soya was produced globally in 2020, meaning the UK represents less than 1% of the world's global soy production.⁶

2.2 Direct imports of soya to the UK

In 2021 the majority of the UK's soya imports when comparing tonnage were soybean meal (73%), with a smaller proportion imported as whole beans ((20%) and soybean oil (7%).

Figure 3: Breakdown of 2021 UK soya imports based on tonnage (UN Comtrade)



⁵ FAO via Our World in Data <https://ourworldindata.org/soy>

⁶ European Soy Monitor, 2022. <https://www.idhsustainabletrade.com/publication/european-soy-monitor-2020/>

Imports or use of soya can be reported in two forms. 'Soybean meal equivalents' reflects that when a soybean is crushed only a proportion of that weight is soya meal, most commonly used in animal feed (approximately 72.5% of the whole bean). The Roundtable also reports using a soybean equivalent figure, which is the volume of whole soybeans required to produce the meal and oil used in the UK. This can be more helpful to identify the impact of the UK's consumption in producer countries as it relates more closely to land used to meet the UK's consumption, but may result in an overestimated volume, as this approach does not reflect that one soybean could be used by different industries e.g., as soybean meal for animal feed and soya lecithin in a chocolate bar. Both of these figures are presented in the report.

The table below summarises publicly available trade data from the UN Comtrade database, which tracks trade between countries using product HS codes.

Where soya has been exported to the UK from a country that is unlikely to be a soya producer (for example Ireland), it is possible to reallocate that soya to the original producer countries by analysing those countries own imports, for example Ireland may import a significant volume of soya from the USA and Argentina. In the UN Comtrade data below any soya imported from the Netherlands and Ireland has been reallocated to likely producer country based on their own import data as the volumes reported were deemed significant (over 50,000 tonnes).

Figure 4: Table to show UK soya imports, based on UN Comtrade data

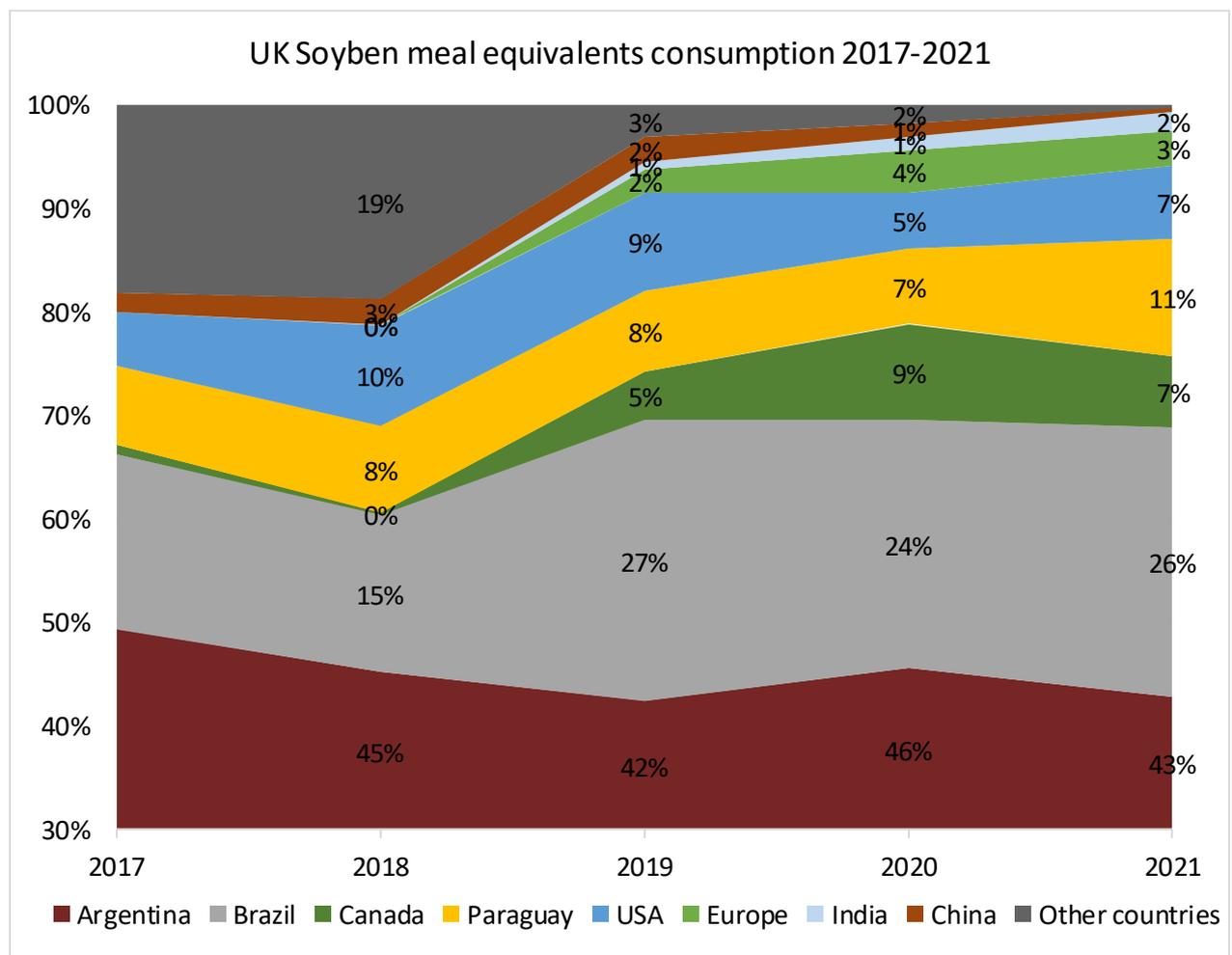
	2019 Soybean meal equivalents (Tonnes)	2020 Soybean meal equivalents (Tonnes)	2021 Soybean meal equivalents (Tonnes)	2021 Share of UK imports	Year on year change
Argentina	1,093,703	1,248,614	1,104,612	43%	-12%
Brazil	702,878	657,808	672,778	26%	2%
Canada	118,608	254,468	175,735	7%	-31%
Paraguay	202,610	201,409	292,605	11%	45%
USA	244,565	147,176	182,301	7%	24%
Europe	57,628	113,780	86,758	3%	-24%
India	17,474	36,374	48,329	2%	33%
China	62,621	32,623	10,587	0.4%	-68%
Other countries	80,736	50,375	5,650	0.2%	-89%
Total	2,580,823	2,742,986	2,579,354		
Total as soybean equivalents	3,563,194	3,783,429	3,557,730		-6%

A comparison of 2020 and 2021 shows that although there has been a slight overall decline in soybean equivalents in 2021 (decreased by 6%) there has been significant year on year change for some producer countries. Specifically:

- The UK imported considerably more soya from Paraguay compared to the previous years, increasing by 45% in 2021.
- Similarly, India (33% increase) and the USA (24% increase) have also seen enhanced volumes in comparison to the previous year.
- However, imports from some countries have decreased, for example Argentina (-12%), Canada (-31%) and European sources (-24%).

These shifts may appear significant when only considering the year-on-year change. However, when reviewing the UK's top sources of soya over the last five years, there is overall a strong level of consistency (see figure 5). For example, Argentina remains around 42-45% over the Roundtable reporting period, we perhaps see the greatest level of variation between Brazil and the USA, which is to be expected given that both countries are the top global producers and have been significantly impacted by trade policy between the USA and China, but even these only vary by 5-10% over the five-year reporting period shown. What can also be seen is the growing level of understanding of where the UK's soya is sourced from, as we see the volume of soya from 'other countries' reducing and the emergence of new country breakdowns such as Europe, India and China.

Figure 5: Graph to show UK soya imports 2017-2021, based on UN Comtrade data



2.3 Indirect imports of soya to the UK

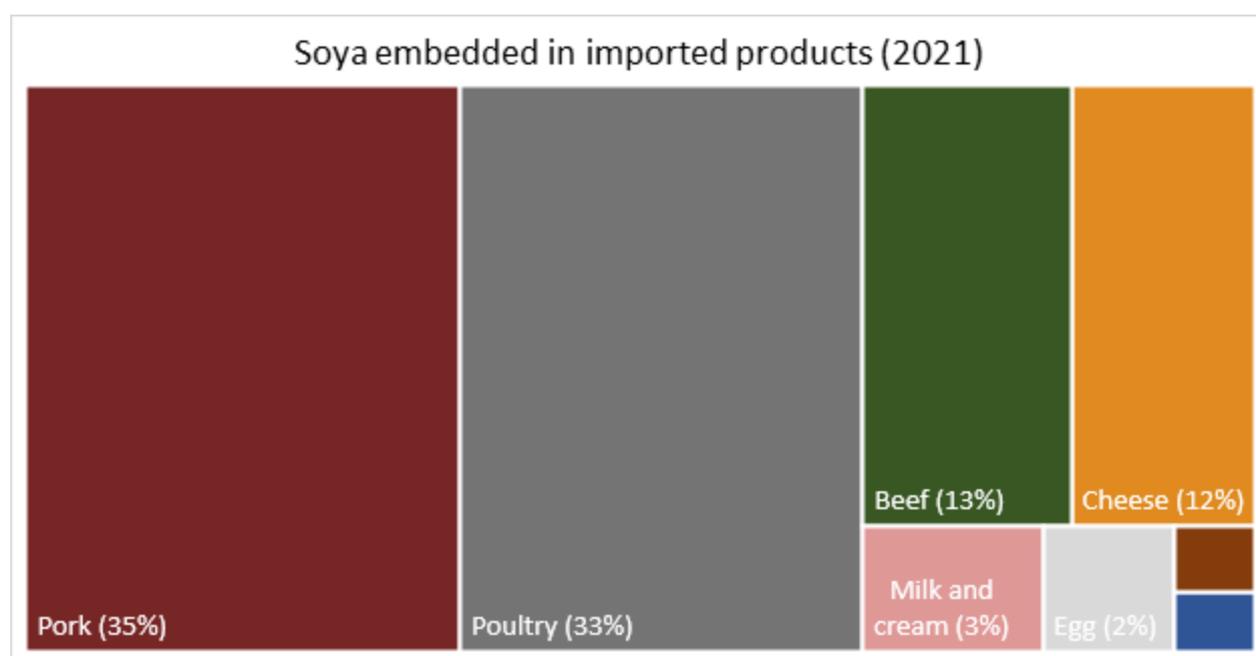
It is important to recognise that as well as importing soya directly from producer countries as soybean meal, oil and whole beans the UK also imports a significant volume of soya ‘embedded’ within products. For example, pigs reared in Denmark will have been fed soya as part of the feed ration before being exported to the UK as bacon.

Each country will have its own agricultural systems and ways of working, which will impact the proportion of soya used in diets, and prevalence of alternatives. For example, the UK and Ireland rear cattle in a more grass-based feed system in comparison to other markets. This can make it particularly challenging to identify the volume of soya that can be attributed to the UK’s imports of meat and dairy products.

To address this challenge, many companies and academics will use a ‘conversion factor’, which can provide a proxy figure or estimate for the volume of soya used, based on global averages. These can vary significantly across different sources, and so this report reflects an average of three sources. The sources are the Dutch Soy Barometer (published 2014), the RTRS Soya Calculator (2020) and WWF Riskier Business (2020). The volume of imported products that may contain soya can be tracked using HS codes, part of the internationally standardised system to classify traded products. For more information on the methodology used, please see the Annex.

In 2020, the UK’s average volume of embedded soya imports was approximately 750,000 tonnes. This year this average volume, is 798,037 tonnes, a 6% increase. The majority of embedded soya imports are found within pork and poultry supply chains (see figure 6).

Figure 6: Graph to show proportion of embedded soya per import category, based on UN Comtrade data



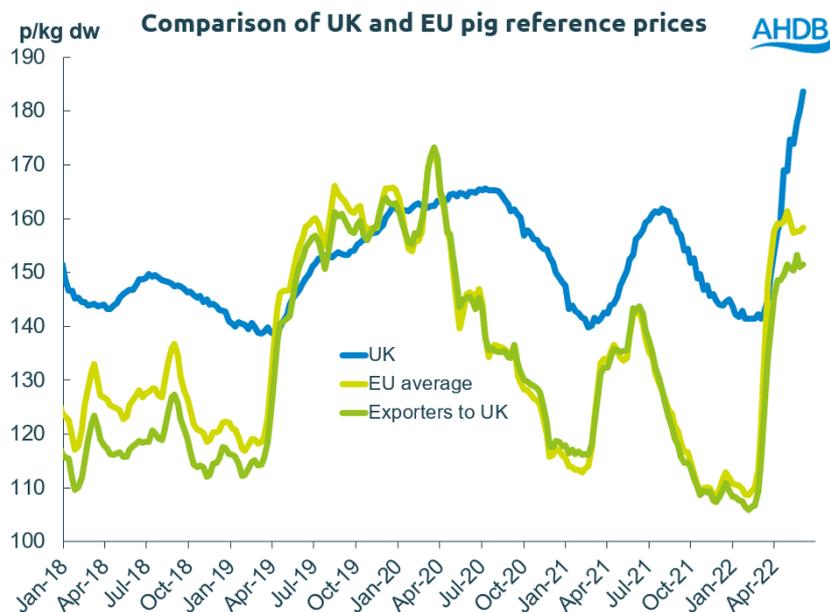
Note: the brown and dark blue shown here represent butter and soya sauce (each representing 1% of imports)

This increase in embedded soya is to be expected as 2021 saw an increased number of food service businesses making purchases compared to 2020 having reopened and operating in a manner more similar to before the Covid-19 pandemic. However, at the start of 2021 companies also needed to respond to changes in trade requirements following the UK's exit from the European Union. As a result, while trade has increased, this increase is smaller than expected as companies adjusted to the new system.

The impact of Brexit, for example adjusting to new trade requirements has been felt particularly in dairy, which have seen an 11% decrease in imported volumes in 2021. AHDB analysis attributed lower volumes of imports in 2021 "due to the impact of Brexit as well as continued disruption from the pandemic" though notes that volumes increase again in 2022.⁷ Beef imports also declined slightly in 2021 (-3%) and this may be for similar reasons as dairy. Ireland is the UK's most significant trade partner for these products, representing 71% of beef imports and 38% of dairy.

In comparison, imports of pork have increased, and this may be due to the competitive pricing of European pigs associated with a lower cost of production compared to those reared in the UK. UK pig farmers have been under sustained pressure due to a shortage of labour in the processing sector initially and then latterly high input costs (such as feed and fuel), which according to AHDB have been exacerbated by the impact of Russia's invasion of Ukraine. As a result of these challenges, AHDB report this could lead to a decline in the size of the UK's sow herd in 2022, which may result in continued imports of pork in the future, perhaps rising by 5% in 2022.⁸

Figure 7: An AHDB graph comparing prices between UK and EU pigs⁹



⁷ <https://ahdb.org.uk/news/uk-dairy-import-volumes-return-to-pre-brexite-levels>

⁸ <https://ahdb.org.uk/pork-market-outlook>

⁹ Note p/kg dw refers to pounds per dead weight KG of pork.

3 UK Roundtable member submissions

Each Roundtable member completes a 'Matrix of Progress' annually, in which they are asked to report on progress against their commitments and provide information on the volume of soya in their supply chain that contributes towards the goal of the roundtable, for example through supporting certification.

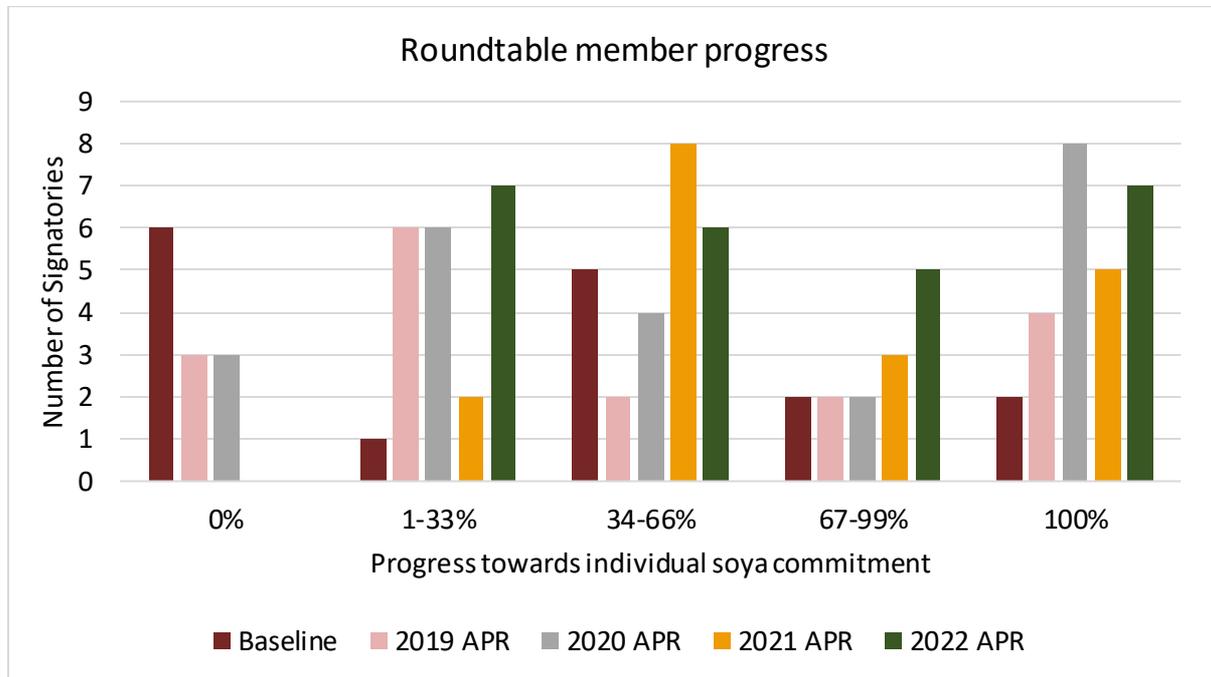
The collective findings from member submissions are then sense checked with certification scheme owners, not only to include volumes not reported by Roundtable members but also to reduce the risk of double counting across the supply chain, for example reporting book and claim certificates twice at a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

This allows the group to estimate the proportion of soya imported into the UK that can be claimed as deforestation and conversion free, and also allows Efeca to support individual companies to make progress.

1. **Creating Policies:** In the initial baseline report (2018) Of the UK Roundtable 56% of companies had a specific deforestation free soya policy in place. This year not only has the number of reporting companies grown, but 80% now have a soya policy. The remaining two companies are recent members, currently developing polices. More than half (61%) had aligned their policy with the UK Soy Manifesto commitments.
2. **Turning policies into action plans:** Of the companies who have a policy in place, 80% had accompanying action plans. This is a substantial improvement on the baseline report, where it was reported that only 30% of companies had a timebound plan in place. Challenges remain when creating action plans, with many companies reporting that without collaborative working and shared solutions it will be challenging to achieve physical flows on an individual company basis. A number of companies signposted to their involvement in sector working groups which will help develop solutions (see below).
3. **Setting ambitious targets:** Interestingly, in 2018 many companies expected to achieve meaningful and demonstrable progress against their commitment by 2020. Reflecting on this time we can say that many companies achieved this, buying a significant volume of certified credits to support sustainable production and send a strong market signal. Now many companies (82%) have set a target of 2025 to achieve physically deforestation and conversion free supply chains, building on this success.
4. **Progress towards full action plan implementation:** The proportion of the UK's direct soya imports linked to a certification scheme has more than doubled since 2018, up to 31%. Figure 8 shows a consistent improvement since the baseline report, with those companies reporting 0% progress declining and those reporting upwards of 67% increasing. It should be recognised that this includes the purchases of certified credits in line with a companies' soya policy, and so should not be interpreted as the percentage of soya that is physically assured as deforestation and conversion free. Interestingly, the number of companies reporting 100% compliance has declined compared to the 2021 annual progress report). Comparing qualitative responses this could be attributed to companies improved understanding of their supply chains and soya usage, correcting

previous overestimates or choosing not to report on credits purchased to focus on claims that can be linked more directly to soya entering their supply chain.

Figure 8: UK Roundtable member progress towards individual commitments



- According to this year's Matrix of Progress submissions, 43% of companies are currently specifying requirements for deforestation and conversion free soya to suppliers, with a further 48% reporting they plan to do so in the next 12 months. When asked about how companies are supporting suppliers to make the transition to deforestation and conversion free soya many reported supplier engagement as a key focus. For example, many have held webinars, training sessions and events to engage and educate suppliers, including through the Roundtable. This includes inviting them to join the Roundtable's webinar with RTRS on the role of mass balance certification. Companies also reported the use of supplier surveys and questionnaires to engage suppliers and to improve understanding of where soya is used and in what volumes. Finally, some companies reported engaging with their own buying teams, to ensure soya requirements were embedded within usual business practices.

4 Measuring deforestation and conversion free soya sourcing

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

For the purposes of this report, soya volumes are considered in compliance with the goal of the UK Roundtable (i.e., supporting the production of soya that is legal and protect forests and valuable native vegetation) through either:

- Being linked to purchases of certified soya volumes from standards that require legal compliance, prohibit legal deforestation, and prohibit legal conversion of other valuable native vegetation (book and claim or mass balance models)
- Provision of alternative evidence to certification that soya can be verified as legally produced and without deforestation and conversion. This may include (but not be limited to):
 - Sourced from countries agreed by Roundtable members to be at lower risk of deforestation or conversion. Currently Roundtable members have agreed this to be the USA, Canada and Europe.
 - Contracted purchases of soya from the Amazon in compliance with the Amazon Soy Moratorium. Though, it is recognised that information on these purchases is currently only available at a trader level and not routinely passed down the supply chain.
 - Soya that is verified as produced legally and free from deforestation and conversion of other valuable native vegetation, for example as part of a regional or landscape approach, satellite mapping or on the ground auditing. It is recognised that this is not currently widely available across the soya supply chain but work in this space is ongoing.

4.1 Certification options

Recognising the wide variety of certification schemes available it is important to distinguish those that meet the principles of legality and the avoidance of deforestation and conversion of native vegetation within their criteria.

The European Feed Manufacturers' Federation (FEFAC) launched a revised version of the FEFAC Soya Sourcing Guidelines¹⁰ (FEFAC SSGs) in 2021, alongside a benchmarking tool. First published in 2015, the guidelines act as a "professional recommendation" for feed operators and others, with essential and desirable criteria across six pillars:

¹⁰ <https://fefac.eu/wp-content/uploads/2021/02/FEFAC-Soy-Sourcing-Guidelines-2021-1.pdf>

- Legal compliance,
- Responsible working conditions,
- Environmental responsibility,
- Good agricultural practice,
- Respect legal land use, and
- Protection of community relations.

The FEFAC SSGs include ‘desirable’, i.e., non mandatory, criteria on deforestation and conversion, and the benchmarking tool¹¹ allows users to easily view which schemes comply with these criteria. While the standards that meet the 2021 soya sourcing guidelines ‘desirable’ criteria on deforestation and conversion do vary in scope and implementation, they all demonstrate progress against the goal of the Roundtable and can be used to support member claims.

At the time of publication, the following standards had successfully been benchmarked against the FEFAC guidelines¹², and all meet the desirable no deforestation and conversion criteria:

- ADM Responsible Soya (version 2)
- Agricultura Sustentable Certificada (ASC) + Module on Non-conversion
- Amaggi Responsible Standard + Deforestation and conversion free module
- Bunge Pro-S Assuring Sustainable Sourcing
 - CSQA Sustainable Cereal and Oilseed Standard (DTP 112)
 - Cargill Triple S Soya Products
- Cefetra Certified Responsible Soya Standard
- Donau Soja/Europe Soya
- FEMAS Responsible Sourcing Module 2021 (note this is not a standard but can be used to specify deforestation and conversion free assured soya).
- ISCC EU/Plus
- Louis Dreyfus Company (LDC) Program for Sustainable Agriculture
- PROFARM production standard
 - Proterra
 - RTRS
- Sustainable Farming Assurance Programme
- US Soy Sustainability Assurance Protocol (USSAP)

Each of these schemes offers a range of chain of custody models but these chain of custody models can be split into three broad categories:

¹¹ <https://sustainabilitygateway.org/european-feed-manufacturers-federation-fefac-soy-benchmarking-tool/>

¹² As above.

Figure 9: Table setting out different chain of custody models in sustainable soya standards

Chain of custody model	Description
Credits or certificates	<p>In a certificate trading system, the credit and certificate transactions are usually completed electronically, as the administrative record flow is not connected to the physical flow of materials or products throughout the supply chain.</p> <p>For this reason, this model cannot guarantee that the physical output actually contains items from a certified source.</p> <p>However, it can be a useful first step for downstream companies, as it allows them to support a producer of sustainable soya and/or account for the impact of soya used in their products. Purchasing credits or certificates can drive demand for sustainable produce and build volumes to allow other chain of custody models to become available.</p>
Mass Balance	<p>A mass balance model involves the use of both certified and uncertified product. The volume of certified product entering the operation is controlled, and only an equivalent amount can then be sold as certified.</p> <p>The physical mixing of certified and uncertified product is allowed but not required – the important thing is that the quantities of both are controlled and documented. Similar to the above, there is no guarantee that all of the soya entering the supply chain meets the standard but again helps to build sustainable volumes.</p>
Segregation	<p>The segregation model ensures that soya from multiple certified sources is kept separate from that of uncertified sources throughout the supply chain, and that output quantities should correspond to the input quantities.</p>

There are also models within each of these categories for example regional credits, area mass balance etc. and companies are advised to consider each scheme individually before taking a decision as to which best suit the needs of their business.

4.2 Measuring progress towards the goal of the UK Roundtable

In previous years, AIC and traders who participate in the UK Roundtable have also provided volumes of soya imports entering animal feed supply chains, including identifying the volume of soya purchased from the Amazon in compliance with the Amazon Soy Moratorium. The methodology to provide this data is currently being revised, and so will not be available until later in the year. For the purposes of this report, an average volume has been used based on

historical data, but this will be reviewed and updated once the trader's own data becomes available.

Using the national UN Comtrade import data above, and the information provided by UK Roundtable members regarding uptake of certification, **we estimate approximately 34 % of the UK's soya used in animal feed is physically deforestation and conversion free** (see figure 10).

Figure 10: Table to show the breakdown of UK direct soya imports considered by the Roundtable to be deforestation and conversion free

	SBM equivalent volume/% of total direct imports
Total soybean meal equivalents	2,579,354
Sourced from countries agreed by Roundtable members to be at a low risk of illegality, and lower risk of deforestation or conversion (Canada, USA, Europe ¹³)	444,794 (17%)
Estimated contracted purchases of soya from the Amazon in compliance with the Amazon Soy Moratorium. ¹⁴	445,340 (17%)
Volume of direct imports remaining	1,689,220 (66%)

In addition to these volumes, UK industry has also continued to purchase soya linked to sustainable soya certification standards to cover the volume of soya used within their individual supply chains. In addition to the 34% reported above, **a further 30% of the UK's soya imports are covered by a sustainability standard with criteria preventing deforestation and conversion**, shown in figure 11.

As in previous years, most purchases are linked to a 'credit' chain of custody model, which do not provide assurance on the physical flows of soya entering the supply chain but do support the sustainable production of soya and pays a premium to soya farmers.

¹³ Note this refers to soya that has been produced in Europe, i.e., soya imported via the Netherlands would be considered in the context of the Netherlands own soya imports.

¹⁴ Based on an average of 517,499 tonnes in 2019 and 373,181 tonnes in 2020.

Figure 11: Table to show the breakdown of UK direct soya imports linked to a deforestation and conversion free sustainability standard

Chain of custody model	SBM equivalent volume/% of total direct imports
Credits	602,262 (23%)
Certification beyond credits ¹⁵	193,350 (7%)
Volumes of direct imports remaining in animal feed not verified as DCF or linked to a DCF certification scheme	893,607 (35%)

The European Feed Manufacturers Federation has created a risk-based methodology to calculate deforestation risk, based on soya country of origin. The methodology identifies a potential risk of deforestation and conversion associated with soya coming from the Brazilian Cerrado, the Argentinean Gran Chaco, and various geographies within Paraguay, allocating a percentage deforestation risk at a country level. This analysis is intended to act as a guide to inform future analysis and stakeholder engagement.

As per the tables below, the FEFAC methodology allocates a 50% risk of Brazilian soybean and soybean meal imported to the EU coming from the high-risk Brazilian Cerrado region, a 5% risk of all imports from Argentina coming from the high-risk Gran Chaco region¹⁶ and a risk of 16% of imports from Paraguay coming from various regions that are deemed to have a higher deforestation risk.

Figure 12: Table to show FEFAC Deforestation Risk Classifications

Country	High-risk region	Share of EU imports from high-risk region
Brazil	Brazilian Cerrado	50%
Paraguay	Various	16%
Argentina	Gran Chaco	5%

If we assume that the 893,607 tonnes of ‘unattributed’ soya entering the UK is sourced from a range of countries in line with the national average (e.g. 43% originates in Argentina) rather than any one country, then this FEFAC deforestation risk methodology could be applied to identify what proportion of this remaining volume of soya is likely to be at risk, as presented in

¹⁵ This includes area mass balance, mass balance and segregated chain of custody models

¹⁶ <https://www.idhsustainabletrade.com/uploaded/2021/06/2019-IDH-European-Soy-Monitor-report.pdf>

figure 13.¹⁷ Again this is a desk based exercise, but one that can be reviewed and compared to trader's own data expected to be released later in 2022.

Figure 13: Table to show the FEFAC Deforestation Risk methodology applied to unattributed soya (UN Comtrade)

Country	Soybean equivalents (tonnes)	Volume from areas with higher risk of deforestation
Brazil (26% of imports)	233,321	116,616
Paraguay (11% of imports)	100,978	16,156
Argentina (43% of imports)	382,464	19,123
Other countries	176,934	176,934
Total	893,607	328,830

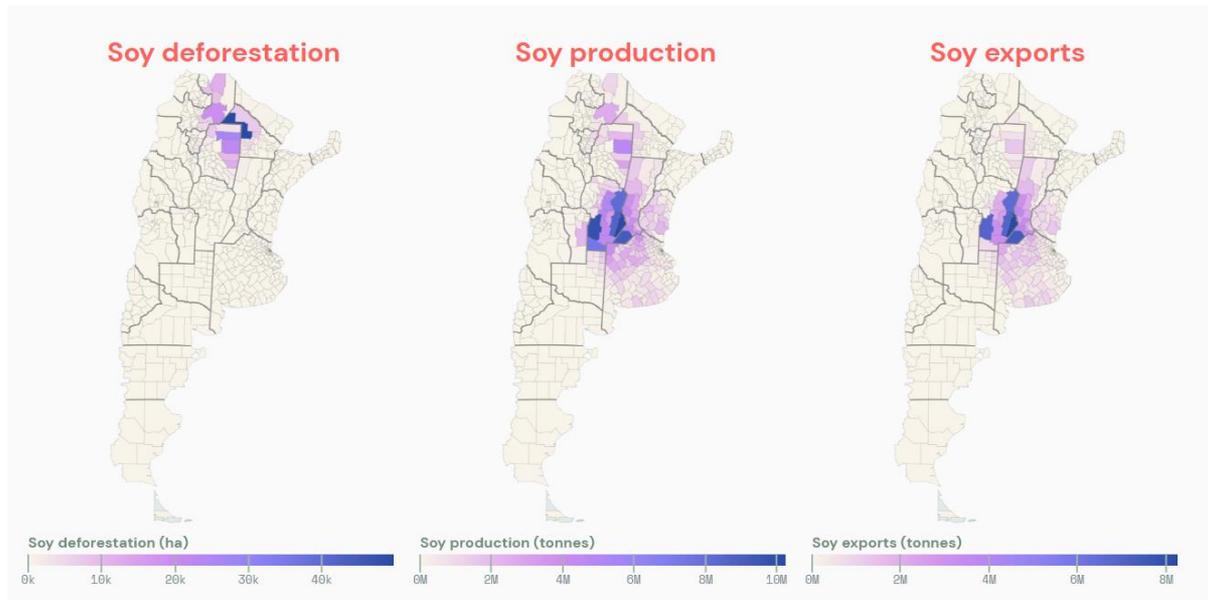
This desk-based exercise indicates that 328,830 tonnes of soya may be linked to areas with a higher risk of deforestation and conversion, this equates to 13% of all direct imports. If we assume that all of the 'unknown' soya was sourced from Brazil, the country assigned the greatest level of risk by FEFAC, then this percentage would increase to 17%. However, it is more likely that much of this volume is sourced from Argentina, given the high proportion of UK imports that originate there, and based on previous AIC data. If this were the case and all this volume originated in Argentina then 44,680 tonnes of soya or just 1.7% of imports may be linked to areas at risk.

This comparatively low proportion of soya at risk is supported by recent analysis using Trase data. The 2021 study has found that most soy exports from Argentina do not come from deforested land. The maps in figure 14 below show departments in Argentina that account for 95% of deforestation, the areas where soya is produced and where Argentina's exports of soya originate. Therefore, it is possible to claim that the risk of soya associated with deforestation entering the UK's supply chain is relatively low.¹⁸

¹⁷ As it is not possible to concretely assign a country of origin to embedded soya imports these have been excluded from the analysis.

¹⁸ Reis, T. (2022). Opportunities for deforestation-free sourcing in Argentina. Trase. <https://doi.org/10.48650/FRWB-1N06>

Figure 14: Maps to show deforestation, soy production and exports within Argentina¹⁹



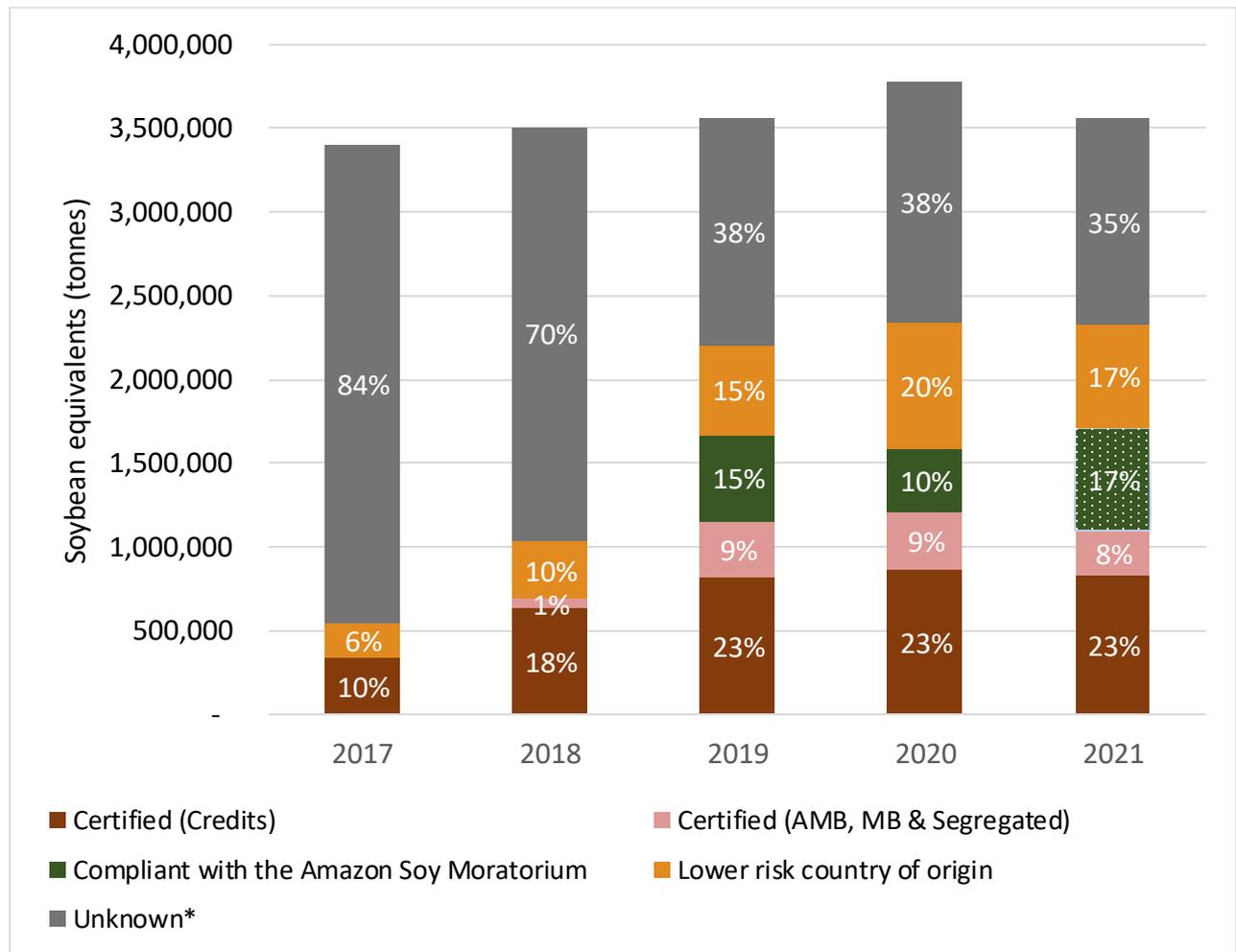
4.3 Summary of the UK’s progress towards deforestation and conversion free soya supply chains.

Through the UK Roundtable, industry has made significant progress since its launch in 2018, learning more about where soya in the UK supply chain is sourced from and taking steps to ensure that soya has not had a negative impact on people or the environment.

The graph below summarises the UK’s total imports of soya each year since the 2017 baseline report, and uses information gathered through Roundtable member matrix of progress updates, and data provided by AIC on the use of soya in animal feed where available to identify what proportion of the UK’s soya remains at risk or requires additional investigation.

¹⁹ As above.

Figure 15 Progress towards the goal of the UK Roundtable on Sustainable Soya (2021)



*Volumes of direct imports remaining not verified as DCF or linked to a DCF certification scheme

In this report, the fifth since the UK Roundtable on Sustainable Soya was established it is possible to see the progress that has been made by UK industry, and the improved understanding of the UK's soya sourcing.

Using the volumes reported as from a lower risk country of origin or predicted to be compliant with the Amazon Soy Moratorium, approximately 34% of direct imports are verified as deforestation and conversion free.

We can also see that the proportion of soya purchased against a certification scheme has remained consistent, with 23% of direct volumes linked to a credit purchase and an additional 8% linked to a chain of custody model providing more physical assurance. This is a slight decrease in comparison to the previous year, many companies have attributed this to more detailed assessments of how soya is used in their supply chains, with some companies revising figures.

As in previous years, the 'unknown' proportion of soya has remained the same, where there is insufficient evidence to make a claim. This figure will improve as developments are made in passing assurance of the physical verified deforestation and conversion free status of soya along

the supply chain (see section 5.2.1 for further details), and as traders' own commitments are delivered. For example, many traders shipping soya to the UK have their own commitments to transparency and deforestation and conversion free sourcing. ADM and Viterro have made commitments that are aligned with the UK Roundtable goal with target dates of 2025, and Cargill's target is 2030.

This year shows that the UK is remaining consistent and continues to consolidate the gains made over the past five years in spite of a challenging market environment. However, this also shows that the UK may not be able to make further improvements without making progress on delivering physical assurance of deforestation and conversion free soya to the UK market. Through the Roundtable and other initiatives UK industry is making progress, and it is anticipated that these gains will be reflected in future trade data as it becomes available.

5 Reviewing the past five years

Since the UK Roundtable on Sustainable Soya was established in 2018, the UK has seen significant changes that have impacted the commodity market, agricultural supply chains and food and drink sector. These range from political changes such as those linked to BREXIT, and incoming Due Diligence regulations on forest risk commodities in the UK and Europe, to a global pandemic which dramatically changed how we purchased and consumed soya. More recently increasing costs of fuel, driven in part by Russia's invasion of Ukraine has led to a market which may be less supportive of change.

Despite this challenging working environment, UK industry has continued to convene together and work collaboratively, and as a result has continued to make progress against the Roundtable's goal. Progress has been made in four main areas of activity, and these have been summarised below.

5.1 Government actions

The past five years have shown Government's taking further steps to support the creation of deforestation free and sustainable commodity supply chains.

In 2020 the UK Government began public consultation as to whether it should introduce due diligence on forest risk commodities. This proposed three main activities:

- That larger companies would be prohibited from using agricultural commodities that had not been produced in line with laws in the countries where they originated
- Require those companies to undertake due diligence, i.e., checking for risks of illegal deforestation in their supply chains
- Require companies to publish information about their due diligence exercise

This legislation was successfully introduced in the Environment Act 2021, as part of a wider package of measures to improve sustainability of supply chains. At this time, Government is currently considering responses to a second consultation that took place at the start of 2022 to explore how this legislation should be implemented.²⁰ At the time of publication, it is not clear which commodities will be considered in scope, and the exact requirements for obligated companies. The UK Roundtables on soya and palm oil were both utilised as opportunities for UK Government to provide updates to industry and gather feedback.

Similarly, due diligence is also being introduced at a European level, though this will go beyond the UK regulation as it will require that products sold in the EU do not come from deforested or degraded land, i.e., beyond illegal deforestation. The regulation was approved by vote in the European Parliament in September 2022, taking a step closer to implementation stage.²¹ As part

²⁰https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1080235/du-diligence-uk-supply-chains-summary-of-responses.pdf

²¹ [Climate change: new rules for companies to help limit global deforestation | News | European Parliament \(europa.eu\)](https://www.europa.eu/en/press-communications/infographic/infographic-climate-change-new-rules-for-companies-to-help-limit-global-deforestation)

of this approval, the latest version of the regulation includes respect for indigenous peoples' and local communities' rights to free, prior and informed consent as a condition for goods to enter the EU.

Both the UK and EU due diligence obligations will have an impact on UK industry, and many companies welcome these actions as a way to 'raise the bar' across industry to ensure that the mass market is stepping up to support the creation of deforestation free supply chains. However, companies have also expressed a keen desire to learn more about how this legislation will be implemented, particularly with regard to accepted evidence of compliance. According to WWF's Riskier Business report, certification coverage remains just 1-2% in the UK's top sourcing countries of Brazil, Argentina and Paraguay.²² This is not to say that all soya from these countries contributes to deforestation, but traceability through soya supply chains remains challenging and therefore demonstrating compliance with incoming regulations may also be difficult without further guidance.

Finally, as summarised in the 2021 annual progress report COP26, hosted in Glasgow, led to a number of commitments on the development of sustainable commodity supply chains and climate change. As we approach COP27 in November 2022 we can expect progress updates on these commitments including a shared roadmap from traders for enhanced supply chain action consistent with a 1.5-degree Celsius pathway.²³

5.2 Cross supply chain engagement and action

Arguably one of the most significant successes of the UK Roundtable has been the convening of industry across the supply chain, to discuss solutions to the shared challenge of deforestation and conversion. Though many RT members are also part of sector specific sustainability groups for many this was the first time each part of the supply chain would be represented in a single meeting.

Many RT members have identified "*understanding different perspectives in the supply chain and from industry bodies*"²⁴ as a key achievement of the Roundtable as it "*helped us to understand the challenges faced by soy farmers and traders*".²⁵ The Roundtable has delivered this support through two activities, the first being regular RT meetings held both in person to allow for informal networking and virtually during the pandemic. The second activity has been a series of working groups, allowing sub-groups of the Roundtable to convene on a particular topic before bringing this back to the wider group. These groups have included:

5.2.1 The data sharing working group

This group contains representatives from across the supply chain but with a greater focus on upstream companies.

AIC (with support of members) has provided to the working group and roundtable

²² https://www.wwf.org.uk/sites/default/files/2020-07/RiskierBusiness_July2020_V7_0.pdf

²³ <https://ukcop26.org/agricultural-commodity-companies-corporate-statement-of-purpose/>

²⁴ Anonymised feedback from a Roundtable members matrix of progress submission (2022).

²⁵ As above.

- An analysis of the use of soya in different animal feeds, including estimates used in home mixed feed
- An annual summary of the UK's soya imports, including the proportion that is linked to lower risk source countries, the amazon soy moratorium and certification

Together this group has identified that embedding and/or aligning deforestation and conversion free sourcing with existing feed safety and quality mechanisms would be the simplest way to ensure mass market adoption of action. AIC (with support from members) has created the FEMAS Responsible Sourcing Module 2021, a voluntary module within the FEMAS standard which allows users to specify FEFAC SSG benchmarked certified soya.

Following ongoing discussions with the UK Soy Manifesto group, AIC and this group are also exploring opportunities to create a verified deforestation and conversion free (vDCF) specification within FEMAS or owned by AIC, which would allow claims of vDCF soya to be shared across the supply chain as an interim step towards sustainability, which the FEFAC SSGs also address for example, good agricultural practices and labour rights.

5.2.2 The pork sector working group

This group contains representatives from traders, feed manufacturers and the pork sector (both large integrators and independent pig farmers).

Using feed data provided by AIC, the group was able to estimate the volume of soya used by the pork sector, and the associated costs of certifying this volume based on estimated costs of credits and mass balance certification.

Together the group has established a template for a sector wide transition plan, despite increased resourcing pressures in recent years. This is expected to be formally agreed following developments within the data sharing working group, for example the creation of the AIC/FEMAS vDCF specification.

In addition, the group has been able to engage in coordinated outreach activities, for example presenting the pork sector transition plan to the Retail Soy Group, and meeting with Defra to discuss approaches to supporting the pork supply chain through this transition.

5.2.3 Dairy, beef and lamb working groups

While the UK Roundtable has established sector working groups where needed, it was agreed early in the Roundtable's development that the group should not reinvent the wheel.

The UK Cattle Sustainability Platform (UK CSP) is an existing group of beef sector companies (with some crossover with lamb) that exists under the umbrella of the Global Roundtable on Sustainable Beef. Rather than duplicate this work Efeca, as Secretariat of the Roundtable, has coordinated with the UK CSP leaders to support the group as they developed a UK CSP soya commitment. This was shared through the Roundtable meetings and is an umbrella activity which each UK CSP member company could then adopt in their individual supply chain.

Similarly Dairy UK is the UK's dairy association representing a significant proportion of the UK's dairy herd, and with support from the Roundtable the group has added sustainable soya

sourcing to the environmental pillar of the Dairy Roadmap, which sets out actions for Dairy UK and members on a range of sustainability goals.

These association/sector level commitments have helped build confidence and provided assurance that companies are moving together as a market, ensuring companies can make progress while remaining competitive.

5.3 Outreach and engagement

Over the five years of the UK Roundtable engaging with other national initiatives across Europe and beyond has been key to delivering a strong, consistent market message to producer countries, and to building a greater number of soya users (and associated volumes) to support a mass market transition.

The UK Roundtable, alongside the Amsterdam Declaration Partnership was a key actor in convening the European National Soya Initiatives (ENSI) group, which brings together initiatives across Denmark, France, Germany, the Netherlands, Norway, Sweden, Austria and the UK. Together the group developed a joint statement, committing to collaboration that supported the production of soya that was legal, deforestation and conversion free and protected human rights.²⁶

This group has been an opportunity to learn and share lessons. For example, the Danish national initiative used both the UK and Swedish groups as inspiration when established the soya initiative in Denmark. When the Danish feed industry announced a sector wide commitment to ensuring all soya consumed would be deforestation and conversion free by 2025²⁷ the UK and other national initiatives were also able to learn from this, bringing findings back to company members.

More recently, in 2020 the French launched the French Soy Manifesto, a collective industry commitment to ensure all physical shipments of soya into France are deforestation and conversion free.²⁸ Several UK companies wished to follow this ambition, and in November 2021 launched the UK Soy Manifesto. The membership of this group has grown from 27 to 33 companies, representing more than 60% of the UK's soya consumption. Finally, in 2022 the Dutch supermarkets created a similar joint commitment to 100% deforestation and conversion free soya by 2025.²⁹ Together Europe consumes approximately 30 million tonnes of soya each year, so by encouraging more of these national commitments across Europe (and other markets) it is possible to increase our leverage in these global commodity markets.

²⁶ https://ad-partnership.org/wp-content/uploads/2020/05/European-National-Soya-Initiatives-Statement_FINAL.pdf

²⁷ <https://agricultureandfood.dk/danish-agriculture-and-food/responsible-soy-production>

²⁸ <https://www.earthworm.org/uploads/files/210202-French-stakeholders-manifesto-to-fight-imported-deforestation-linked-to-soybean.pdf>

²⁹ <https://vakbladvoedingsindustrie.nl/en/article/a-deforestation-and-conversion-free-soy-chain-in-2025>

5.4 Supporting innovation and learning

As well as an improved understanding of deforestation and conversion free supply chains and the development of action plans that will deliver this ambition, the Roundtable has also acted as a convening space to support innovation and learning.

One of the clearest areas of learning has been around the linkages between sustainable commodity sourcing and reducing company scope 3 emissions. Most food and drink businesses (and therefore palm oil and soya users) have made commitments and targets to reduce their emissions but face the challenge of how to robustly track their progress. There is also a need for greater consistency across measuring and reporting, to ensure that different reports are comparable and fit for purpose. In 2022 WRAP presented their Scope 3 Measurement and Reporting protocols for UK food and drink businesses to the UK Roundtable, which bring together guidance from the Greenhouse Gas Protocol and Forest, Land and Agriculture (FLAG) guidance under the Science Based Targets Initiative (SBTI).³⁰

In addition to carbon and emissions, the Roundtable has also been able to feed into the creation of new technologies, for example the use of isotopic testing to support greater traceability of soya based on the chemical profile of different soya producing areas. This work is still in development but has previously seen success when verifying authenticity and reducing food fraud.

the Roundtable has also been a conduit for discussion in broader areas of sustainability. This year the work of the Roundtable was recognised by the Soil Association as an activity to support the adoption of sustainable soya policies, and as a mechanism that could extend beyond deforestation and conversion to explore wider sustainability issues such as pesticide use.

“The Roundtable has nevertheless played a role in encouraging and supporting British retailers and businesses to adopt sustainable soya policies, with a focus on monitoring and reporting and increasing uptake of soya certification and feed assurance schemes.” Soil Association, 2022³¹

³⁰ <https://wrap.org.uk/resources/guide/scope-3-ghg-measurement-and-reporting-protocols-food-and-drink>

³¹ <https://www.soilassociation.org/media/24393/stop-poison-poultry-reportv1.pdf>

6 Conclusion

The UK Roundtable on Sustainable Soya has supported significant progress over the past five years. Together the group, representing the whole UK supply chain from trader to customer facing retailers and food service companies has seen an increase in the uptake of certified soya, and in the creation of detailed policies and action plans to ensure all soya entering the UK is deforestation and conversion free.

While national progress towards the goal of the Roundtable has plateaued at 65% of the UK's soya consumption being linked to either verified deforestation free sources or certification this should not be seen as a lack of action by industry over the past year. Many companies have identified that they will be unable to make further progress alone, and this time has been used to set the foundations for collective action.

To delivery greater uptake and assurance of deforestation and conversion free sourcing, the supply chain must act together to create joint action plans. To build these plans companies need two things. Firstly, to understand the starting point, what can be said about soya being used today, and incoming Due Diligence regulations both in the UK and in the EU can help drive greater transparency. This will also require industry to agree on an aligned definition and ways of working, to ensure accurate sharing of data and a level playing field when demonstrating compliance.

Secondly, companies will need support to identify tools and mechanisms that can be used to support greater uptake of soya in line with the Roundtable's goal. Activities such as the data sharing working group and the development of the pork sector transition plan (despite the challenging working environment) are key to meeting both these needs. Both are opportunities to share lessons across the supply chain and to sense check if proposals can be 'operationalised' across the supply chain. In addition, lessons can also be shared across different markets, for example the UK can take lessons from the Danish agricultural industry, and in turn can share lessons with the Dutch market as retailers in the Netherlands create their own soy Manifesto.

Many companies, responding to the call for action of due diligence, increasing NGO pressure are setting public timebound commitments to ensure all soya physically entering their supply chains will be deforestation and conversion free as soon as possible. A consistent learning across all five years of the Roundtable, and other national soya initiatives is that this will only be achieved through collaboration and aligned actions from across the supply chain.

Annex Methodology

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

The highly complex nature of soya supply chains and ultimate end uses means that it can be challenging to accurately capture data on all products containing soya. For this reason, reporting is split into sections, the first being the total volume of soya entering the UK, including the country of origin and any inter-European trade. The second being verifying the proportion of soya linked to deforestation and conversion.

A.1 Data sources

Total volumes of UK imports of soya have been gathered using the International Trade Centre (ITC) Trade Map tool, which uses UN COMTRADE data to provide import and export information based on HS codes.

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

The Agricultural Industries Confederation (AIC) is the UK trade association for several sections of the agrisupply industry including 90% of UK animal feed, and 90% of UK grain and oilseeds. The association has over 250 members and represents £6.5 billion turnover at farmgate. The AIC supports collaboration throughout the food chain to support modern commercial agriculture in the UK. AIC has previously provided its soya supply data reports for use in this annual progress report series, having first provided this for the 2020 (2019 data) APR. This report is a summary provided by the four main traders to the UK of the volume of soya used in animal feed supply chains. This includes country of origin and sustainability claims. The AIC soya supply data report is currently undergoing a methodology review and will be made available before the end of 2022. Once published the findings of this annual progress report will be reviewed and updated as necessary.

The ITC trade map can provide more detailed breakdowns of soya (e.g., whole beans, meal, oil) and covers all soya usage in the UK including soya for human consumption. However, the AIC data presents a more accurate summary of country of origin for most of the UK's soya and provides an additional layer of information that would otherwise not be publicly available. For example, the volume of soya sourced in compliance with the Amazon Soy Moratorium.

A.2 Indirect soya imports

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

To calculate the volume of soya associated with these products, proxy calculations can be used to provide a reasonably accurate estimate of the volume of soya that has been used to produce the volume of chicken, pork etc. sold to the UK. Proxy figures vary across different sets of research, and so Efeca has chosen to present a range of figures across several sources: RTRS³² (an independent 3rd party certification scheme), the Dutch Soy Barometer³³ and WWF's Riskier Business report.^{34,35}

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

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

	RTRS Conversion factor	WWF Riskier Business report (2020) conversion factors	Dutch Soy Barometer (2014) conversion factors
Chicken	0.756	0.575	0.6
Pork	0.507	0.263	0.33
Cheese	0.182	0.1442	0.3
Beef	0.451	0.18	0.4
Margarine	0.241		0.06
Eggs (per unit)	0.533	0.307	0.036
Milk (per m3)	0.037	0.017	0.03

³² <https://responsiblesoy.org/rtrs-soy-footprint-calculator?lang=en>

³³ http://www.bothends.org/uploaded_files/document/Soy_Barometer2014_ENG.pdf

³⁴ https://www.wwf.org.uk/sites/default/files/2020-07/RiskierBusiness_July2020_V7_0.pdf

³⁵ Please note, that the Risky Business report has used proxies based on a mid-range estimate from a range of sources.

Table B: HS Codes captured in this report

HS Code	Description
0201	Meat of bovine animals, fresh or chilled
0202	Meat of bovine animals, frozen
0203	Meat of swine, fresh, chilled, or frozen
020410	Fresh or chilled lamb carcasses and half-carcasses
020421	Fresh or chilled sheep carcasses and half-carcasses (excluding lambs)
020422	Fresh or chilled cuts of sheep, with bone in (excl. carcasses and half-carcasses)
020423	Fresh or chilled boneless cuts of sheep
020430	Frozen lamb carcasses and half-carcasses
020441	Frozen sheep carcasses and half-carcasses (excluding lambs)
020442	Frozen cuts of sheep, with bone in (excluding carcasses and half-carcasses)
020443	Frozen boneless cuts of sheep
0206	Edible offal of bovine animals, swine, sheep, goats, horses, asses, mules, or hinnies, fresh, chilled, or frozen
0207	Meat and edible offal of fowls of the species Gallus domesticus, ducks, geese, turkeys, and guinea fowl, fresh, chilled, or frozen
020711	Fresh or chilled fowls of the species Gallus domesticus, not cut into pieces
020712	Frozen fowls of the species Gallus domesticus, not cut into pieces
020713	Fresh or chilled cuts and edible offal of fowls of the species Gallus domesticus
020714	Frozen cuts and edible offal of fowls of the species Gallus domesticus
021011	Hams, shoulders, and cuts thereof of swine, salted, in brine, dried or smoked, with bone in
021012	Bellies streaky and cuts thereof of swine, salted, in brine, dried or smoked
021019	Meat of swine, salted, in brine, dried or smoked (excl. hams, shoulders and cuts thereof, with bone in, and bellies and cuts thereof)
021020	Meat of bovine animals, salted, in brine, dried or smoked
0401	Milk and cream, not concentrated nor containing added sugar or other sweetening matter
0402	Milk and cream, concentrated or containing added sugar or other sweetening matter

0403	Buttermilk, curdled milk and cream, yogurt, kephir and other fermented or acidified milk and cream, whether or not concentrated or flavoured or containing added sugar or other sweetening matter, fruits, nuts, or cocoa
0404	Whey, whether or not concentrated or containing added sugar or other sweetening matter; products consisting of natural milk constituents, where or not containing added sugar or other sweetening matter
0405	Butter inc. dehydrated butter and ghee, and other fats and oils derived from milk, dairy spreads
0406	Cheese and curd
0407	Birds' eggs, in shell, fresh, preserved or cooked
040721	Fresh eggs of domestica fowls, in shell (excluding fertilised for incubation)
040729	Fresh birds' eggs, in shell (excluding of domestic fowls, and fertilised for incubation)
040790	Birds' eggs, in shell, preserved or cooked
040811	Dried egg yolks, whether or not sweetened
040819	Egg yolks, fresh, cooked by steaming or boiling in water, moulded, frozen or otherwise preserved, whether or not sweetened (excluding dried)
040891	Dried birds' eggs, not in shell, whether or not sweetened (excluding egg yolks)
040899	Birds' eggs, not in shell, fresh, cooked by steaming or boiling in water, moulded, frozen or otherwise preserved, whether or not sweetened (excluding dried)
160241	Hams of swine and cuts thereof, prepared or preserved
160242	Prepared or preserved shoulders and cuts thereof, of swine
160249	Prepared or preserved meat and offal of swine, incl. mixtures (excl. hams, shoulders, and cuts thereof, sausages and similar products, finely homogenised preparations put up for retail sale as infant food or for dietetic purpose, in containers of a net weight of <= 250 g, preparations of liver and meat extracts and juices
160250	Prepared or preserved meat or offal of bovine animals (excl. sausages and similar products, finely homogenised preparations put up for retail sale as infant food or for dietetic purposes, in containers of a net weight of <= 250 g, preparations of liver and meat extracts and juices
210310	Soya sauce

A.3 Measuring Progress of Roundtable members

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

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

- Assessment
- Policy
- Timebound plans
- Transparency

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

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

A.4 Assumptions

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

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

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

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

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