

SOY - THE 2015 UPDATE



In line with the Netherlands' commitment to contribute to the creation of a more sustainable soy value chain and to find alternatives for soy and reduce soy consumption, the Dutch Soy Coalition publishes a biennial *Soy Barometer*, which measures how these commitments are met. The following is an update on the situation in 2015.

CONCLUSION

The import, processing and consumption of soy in the Netherlands continued unabated in 2015 – mainly for animal feed. However, soybean cultivation continues to cause major social and environmental problems, especially in South America.

The Netherlands' objective to purchase responsible soy was not achieved: only 34% of the target was certified RTRS (Round Table on Responsible Soy) or equivalent in 2015. While supermarkets and the dairy industry met their own targets, the animal feed-, pork- and poultry sectors failed to deliver.

There is no new plan in place for the post-2015 period. In fact, the animal feed sector has abandoned its ambition to meet the RTRS-standard, opting instead for the more attainable minimum European benchmark, the so-called FEFAC Sourcing Guidelines.

Experiments to replace soybeans with regional (European) crops are being carried out, but only on a small scale.

THE CONSEQUENCES OF SOYBEAN CULTIVATION

Large chunks of nature and the natural habitats of (indigenous) communities are destroyed to free up land for soybean cultivation, especially in South America. This leads to the displacement of local vegetation and an increase in greenhouse gases, which contribute to climate change. The excessive use of herbicides causes severe ground- and surface water pollution.

SOY IN THE NETHERLANDS

The Dutch animal feed industry still uses almost as much soy as it did in 2011. Over 8 million tonnes of soybean – all of it cultivated outside of Europe – was imported by the Netherlands in 2013, mainly for animal feed. Although the percentage of soy used in the Dutch animal feed industry fluctuates somewhat, it is expected that usage in 2015 will be on par with that of 2013.

RESPONSIBLE SOY

In 2011, Dutch companies in the soy value chain expressed their intention to use only responsible soy in 2015, but this intention was not honoured. Only 34% of the imported and processed soy was certified according to the RTRS standards, or the equivalent thereof. The Dutch dairy sector did reach its 100% target and Dutch supermarkets are now demanding responsible soy in their purchasing agreements. However, the pork and poultry sectors are lagging behind with a compliance of only 10%.

The European Feed Manufacturers' Federation (FEFAC) presented its own minimum soy sourcing guidelines in 2015. These guidelines are far less stringent, with more relaxed criteria for deforestation and compliance monitoring, for example. Unfortunately, a large part of the Dutch animal feed sector has chosen to follow FEFAC's more flexible guidelines. This does not come close to the sustainability level Dutch companies expressed an intention to meet in 2011, and it is a big step backwards.

THE NEGATIVE IMPACTS OF INCREASED SOYBEAN PRODUCTION:



DEFORESTATION



LAND CONFLICTS



FOOD INSECURITY



DRAINING OF WETLANDS

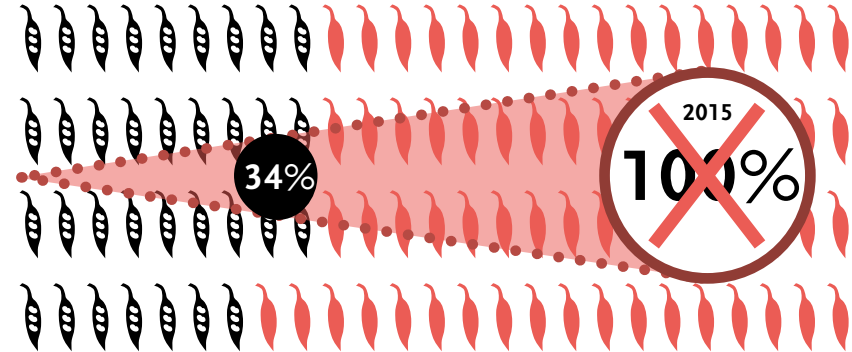


SOIL DEGRADATION



EXCESSIVE USE OF PESTICIDES AND FERTILISER

100% RESPONSIBLE SOY TARGET NOT REACHED IN 2015



In 2014, the *Stichting Ketentransitie Verantwoorde Soja* (“Dutch Foundation for the Supply Chain Transition to Responsible Soy”) was revoked, after which it became impossible to gain insight into the goals and commitments of Dutch companies regarding the import of responsible soy.

REPLACEMENT

Another approach is to replace imported soy with protein rich sources from the Netherlands and Europe. Several small-scale experiments and initiatives are currently being conducted, including GIJS free range eggs and *Aurora Lentekaas* (“spring cheese”), which are produced using local protein rich crops and the *Oerei* (“primal egg”), from chickens that were fed their original diet: insects. Some 300 tonnes of soybeans were produced in the Netherlands itself in 2014, but the large-scale replacement of imported soy with regionally produced protein sources is not feasible yet.

REDUCTION

The third strategy is to reduce the consumption of animal proteins. Most Dutch supermarkets offer a variety of vegetarian products and meat substitutes. The meat industry is also experimenting with blending plant-based raw materials into processed products, but systematic soy reduction has not been deployed in the Netherlands yet.

THE DUTCH SOY COALITION URGES THE DUTCH GOVERNMENT AND BUSINESSES TO:

1. Set new targets with concrete steps that will pave the way towards 100% sustainability of the soy chain (at least RTRS or equivalent), responsible replacement of soy, and reduction of animal protein consumption.
2. Ensure the permanent and transparent monitoring of progress made towards these goals.

2016
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