

Development of Soy Sustainability Standards – MVO Perspective

Seminar on U.S. Soybean export
Council's certification of Sustainable Soy

10-10-2013

Importance of Soy

- Soy meal for feed
- Soy Oil:
 - Food,
 - Cosmetics
 - Detergents
 - Biofuels

Issues mentioned

- Deforestation
- Soil Degradation
- Land Conflicts
- Food Security
- Labour Conditions
- Agrochemicals
- Biofuels
- ...

Soy Usage

- Increasing consumption of meat, dairy products and eggs
- Soy meal used for noodles, baby food, breakfast products
- Soy oil for frying oils, margarines, sauces, soups, ready-meals, bakery products, candies, cosmetics, industrial products
- Biofuel (RED: EU Approved: RTRS, ISCC,...)
- Biobase products (EC mandated CEN to develop standard for sustainable biobase products)

Soybean Oil usage EU-27

	2011	2012
Food end-use	1150 (45%)	680 (41%)
Biodiesel end-use	930 (37%)	500 (30%)
Direct energy end use	0 (0%)	40 (2%)
Non energy technical end-use	50 (2%)	50 (3%)
Feed end-use	410 (16%)	402 (24%)
	2540	1672

Source: Fediol

Import

- Primarily from South America
- NL: Around 8.7 m ton import, Majority exported

Sustainability Initiatives (Voluntary)

- 2006: Task Force Sustainable Soy
- 2008: Initiative Sustainable Soy
- 2011: Chain Transition Responsible Soy
 - Feed and food sector, retail
 - Supported by IDH and NGO's

KPMG Latest Report

- Growing Soy Market
- Impact on Environment and Society
- For South America: need to control legislation
- Responsible Soy is relevant

KPMG Latest Report

- Demand Lacking
- Availability of certified soy
- More than one scheme (Multiple costs)
- Producers costs

Topics

- Biofuels
- Non-GM
- Soy Alternatives

EU / NL Soy Import (1000 t)

	Argentina	Brazil	US	Canada	Paraguay	Ukraine	Other	Total
Soybeans								
NL		1.034	809	326	489	-	78	2.738
EU	32	5.711	2.101	1.114	1.686	990	495	12.130
Soy Oil								
NL			-				36	36
EU		36	-			42		370
Soy meal								
NL	1.425	3.287	66				25	4.805
EU	8.642	9.370	734	67	170	5	634	19.625