



# SOY BAROMETER 2014

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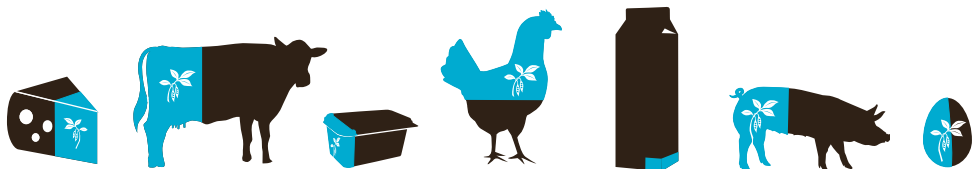
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# THE SECRET LIFE OF SOY



301

GRAMS  
OF SOY

400

GRAMS  
OF SOY

66

GRAMS  
OF SOY

605

GRAMS  
OF SOY

34

GRAMS  
OF SOY

336

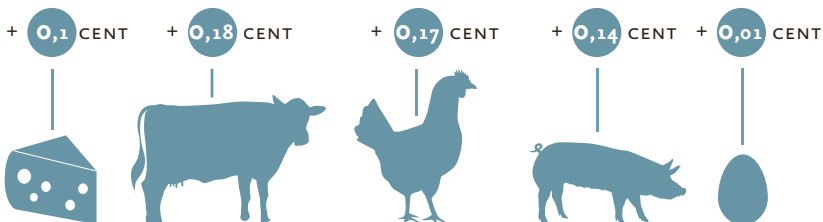
GRAMS  
OF SOY

36

GRAMS  
OF SOY

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PER KILO / PER LITRE / PER EGG



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HOW MUCH MORE WOULD WE HAVE TO PAY IF  
WE USE **RTRS** CERTIFIED SOY?

PER KILO / PER EGG

# INTRODUCTION

When people hear the word “soy” most of them think of soy milk and meat substitutes such as tofu. But many of us don’t realise that soybeans are present in more than half of the products in the supermarket, in one way or another, and that we consume more soy than we think.

The majority of soybeans are used to manufacture soybean oil and protein rich **soymeal**, an important ingredient in livestock feed, used for the production of meat, milk and eggs. **Soybean oil** is also found in many other products, such as detergents and biodiesel.

The global consumption of soy is increasing, partly because of population growth, but also because of rising prosperity in countries such as China. This has led to an explosive growth in worldwide meat consumption, leading in turn to an increasing need for fodder, and thus soy.

Soy production provides income, but also has great social, environmental and economic impacts in countries where soy is grown. To address these problems and to seek solutions, Dutch civil society organisations founded the Dutch Soy Coalition in 2004. The coalition collaborates with scientists, the private sector and civil society organisations in soy producing, processing and consuming countries to find ways to reduce the negative effects of soy production.

The Dutch Soy Coalition focuses on the three R’s of **Replacement**, **Reduction** and **Responsibility**: **Replacement** of imported soy in animal feed, **Reduction** of soy consumption and taking a **Responsible** approach to soybean production. This publication is mainly focused on the two R’s of Replacement and Responsibility.

In the Netherlands, various parties are committed to ensuring that we will only process and use responsible soy. But how are these developments evolving? Are things going in the right direction? The Dutch Soy Coalition addresses these questions, and more, in the latest edition of the Soy Barometer, the third in its series. For more details, please see the background report, which you can order from the Dutch Soy Coalition.

## NEGATIVE EFFECTS OF SOY PRODUCTION



### DEFORESTATION

Forests, savannahs and grasslands have been destroyed to make way for soy cultivation. In addition to the loss of biodiversity and clean water, this has also led to an increase in greenhouse gas emissions, which, in turn, negatively impact the environment.



### SOIL DEGRADATION

Large areas of natural vegetation have been replaced by soy monoculture. Once the soil becomes less fertile, fertiliser is used to compensate. This leads to the loss of natural nutrients and degradation of the soil.



### LAND CONFLICTS

Large farm enterprises and businesses have been known to acquire land by clearing forests illegally or by dispossessing local communities of their land. Since tenants and local communities often do not hold official land titles, they have little opportunity to claim their land rights.



### FOOD SECURITY

Increased soybean production can put local food supplies at risk: land that was originally used for the cultivation of corn, rice, oats and beans is now used for the cultivation of soy, endangering the food security of local communities.



### MODERN SLAVERY

Cases of forced labour practices have been reported in soy farming. Some workers are expected to pay back their 'advances', employment is seasonal, and therefore temporary by definition, and working conditions are sometimes poor.



### GENETIC MODIFICATION

Genetic modification (GM) has been used to make much of the soy grown in North and South America resistant to the herbicide glyphosate (especially Roundup Ready soy). The use of genetically modified soy has led to heated discussions regarding its benefits and drawbacks.



### DRAINAGE OF WETLANDS

Wetlands are being drained on a large scale to create new land suitable for soy cultivation. The use of pesticides in these wetlands leads to severe water pollution, threatening areas that are essential for drinking water, livestock and biodiversity.



### PESTICIDES AND FERTILISERS

The use of pesticides and fertilisers carries certain health risks. Their use can also contaminate ground and surface water.



### BIODIESEL

Soybean oil is increasingly being used to make biodiesel. New land is often cleared and forests are felled to make room for soybean cultivation. This leads to additional greenhouse gas emissions, which causes biodiesel to have negative environmental impacts.

# SOY IS EVERYWHERE

Soybeans are edible beans that grow on an annual plant in temperate, subtropical and tropical climates in the United States, South America (especially South Central Brazil, Argentina and Paraguay), Asia (especially Central India and Northeast China) and, to a limited extent, in Russia, Africa (especially Angola and Mozambique) and Europe (mainly in the Ukraine and Italy). The global soybean harvest has increased by 140% in the past 20 years. In 2013, the main soy producing country was the USA, followed by Brazil and Argentina.

Despite these percentages, you will not easily find a packet of soybeans in the supermarket, because soy is mainly used in processed foods. The most recognisable soy products are food items such as soy milk, soy sauce, tofu and other meat substitutes. Yet only 6% of the soybeans produced worldwide are used for such foods, mainly in Asia. The majority of soybeans are used to produce soymeal and soybean oil.

Soymeal is a much-used ingredient in fodder because it is very protein-rich. The high demand for soy in recent decades has been a direct result of the growing global population and related consumption patterns. Humans are consuming increasing amounts of dairy and meat and more and more soy is needed to feed the growing number of livestock.

Soybean oil is mainly used in food products, such as mayonnaise, margarine, sauces and dressings, but can also be found in biscuits, ready meals, ice cream and other snacks. Soybean oil can even be found on the labels of cosmetics, detergents and cleaning products.

In addition, an increasing amount of soybean oil is used in biodiesel production, mainly in the USA. Lecithin, a by-product of the soybean pressing process, is used by the food industry as an emulsifier in products such as chocolate and peanut butter.

# GLOBAL SOY PRODUCTION 1993 2003 2013

IN 1,000,000 TONNES OF SOY BEANS

51 67 89

1993 2003 2013

USA

1 2 5

1993 2003 2013

EUROPE

15 15 13

1993 2003 2013

CHINA

2 4 9

1993 2003 2013

PARAGUAY

0 2 2

1993 2003 2013

BOLIVIA

11 35 49

1993 2003 2013

ARGENTINA

23 52 82

1993 2003 2013

BRAZIL

5 8 12

1993 2003 2013

INDIA

---

115 191 276

1993

2003

2013

TOTAL

(INCL. OTHER COUNTRIES)

# NEGATIVE IMPACTS OF SOY IN PRODUCTION COUNTRIES

In Europe, soy is the import crop that causes the most deforestation: some 60% of the deforestation caused by crops exported to Europe is the result of soybean cultivation. Soy is grown primarily in North- and South America, and with the expansion of the areas where soy is grown, millions of hectares of forest, savannah, grasslands and wetlands are disappearing. This doesn't only translate to an invaluable loss of biodiversity, but also to the disruption of water management, with significantly increased risks of droughts and floods. Moreover, deforestation leads to the release of greenhouse gases, contributing to climate change.

Wherever intensive soy cultivation takes place, the landscape changes completely. The disappearance of natural vegetation causes soil to lose its protective fertile layer, making it a less conducive environment for plant growth. To compensate, fertiliser and many pesticides are used for the cultivation of soybeans. These farming solutions pollute ground- and surface water, and endanger the health of the people living in the vicinity of soy plantations.

In recent years, soy production has spread to sensitive areas that are actually not suitable for soy cultivation. Not only in the Amazon, but also in drier areas such as the *Chaco* and wetlands such as the *Pantanal*. To ensure a good harvest in areas that are too wet or dry, (GM) seeds are used with a range of pesticides that are suitable for the soy, but disastrous for the rest of the area. Most of the soy grown in these areas and elsewhere is genetically modified (GM) - in Argentina up to 99%.

Increased soy cultivation has also caused various social problems. Small-scale farmers, who are dependent on the land and water for their survival, see their environment changing into large soy plantations. Powerful corporations force locals to hand over their land, sometimes through violence. Without official land titles, thousands of subsistence farmers are losing their land, and thus, their income.



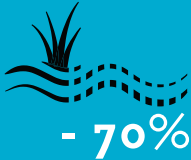
## IMPACT IN NUMBERS

### 300% GROWTH FROM 1993 TO 2013

Soy production in Latin America increased by 300% between 1993 and 2013, from 18.4 million hectares to 55.6 hectares.



+ 300%

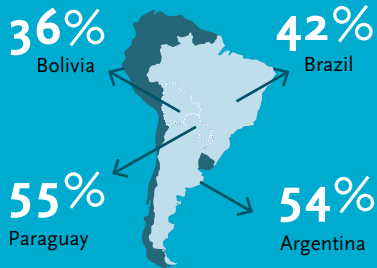


### 70% LOSS OF THE SALADILLO WETLANDS IN CÓRDOBA, ARGENTINA

In the province of Córdoba, Argentina, 70% of the Saladillo wetlands have been lost as a result of the construction of canals for soy cultivation. In addition, 20% has been destroyed, with major implications for water management.

### CROPLAND USED FOR SOY CULTIVATION

A very large part of the cropland in South America is used for soy production.



10

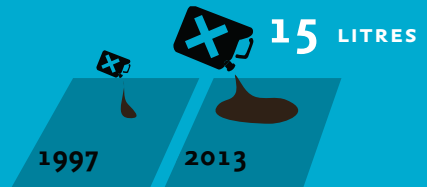


### 10 COMPANIES USING SLAVERY IN BRAZIL

According to the *Slave labour laundry list*, based on information from the Brazilian government, it appears that still at least ten soybean companies in Brazil are guilty of modern slavery practices.

### FROM 3 TO 15 LITRES OF POISON PER HECTARE

Currently, an average of 15 litres of chemicals per hectare is used for the production of soy in South America.



# THE GLOBAL SOY TRADE

The cultivation of soybeans in producing countries is the first link in the soy chain, but there are enormous varieties in scale. There are millions of small-scale farmers in South America, Asia and Africa who grow soy on less than 50 hectares of land. However, most soy is grown on huge industrial farms of up to 100,000 hectares, mainly in Brazil and Argentina.

Some two-thirds of the global soybean production - 173 out of 276 million tonnes - is exported. Brazil is the largest supplier, and its soybean exports have increased by 75% in the past six years. Argentina is the third-largest soy exporter, but leads the world ranking when it comes to the export of soymeal and soybean oil.

Soy is harvested, purchased, processed and subsequently traded in the form of beans, meal or oil. Four multinational companies dominate the global soy trade and processing industry: Archer Daniel Midlands (ADM), Bunge, Cargill and Louis Dreyfus. These multinationals are mainly from the United States and Europe. Other key players are the Brazilian Maggi Group, Japan's Marubeni and Dutch-Chinese Nidera. These key traders sell their (processed) soy stock to the feed industry and the food- and cosmetics industries. Multinational companies such as Unilever, Danone, Procter & Gamble, Mondelēz and Nestlé play an important role in these industries.

China is the world's main soy importer, followed by the European Union. In 2013, China imported more than half of the globally traded soy, while the European Union purchased the most soy meal. China's demand for soy is increasing due to the country's population growth, economic growth and the associated increase in meat consumption.

# WORLDWIDE SOY IMPORT & EXPORT 2008 2011 2013

IN 1,000,000 TONNES OF SOYBEANS, -MEAL AND -OIL

EXPORT 

29 49 57

BRAZIL

43 43 50

USA

41 43 37

ARGENTINA

6 7 8

PARAGUAY

4 5 4

INDIA

1 1 2

BOLIVIA

0 1 2

UKRAINE



TOTAL PRODUCTION

IMPORT 

9 9 8

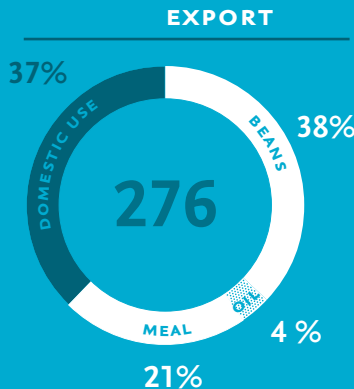
THE NETHERLANDS

32 29 24

REST OF EUROPE

40 54 65

CHINA



# DUTCH IMPORT AND EXPORT OF SOY

The Netherlands is an important global trading partner and the second largest exporter of agricultural products in the world, after the United States. The Netherlands is also the largest importer of soy in the European Union and thus an important link in the European soy chain. About a quarter of the soy imported by the European Union arrives through the Dutch ports of Amsterdam and Rotterdam. The Netherlands imports soy mainly from South America, especially from Brazil.

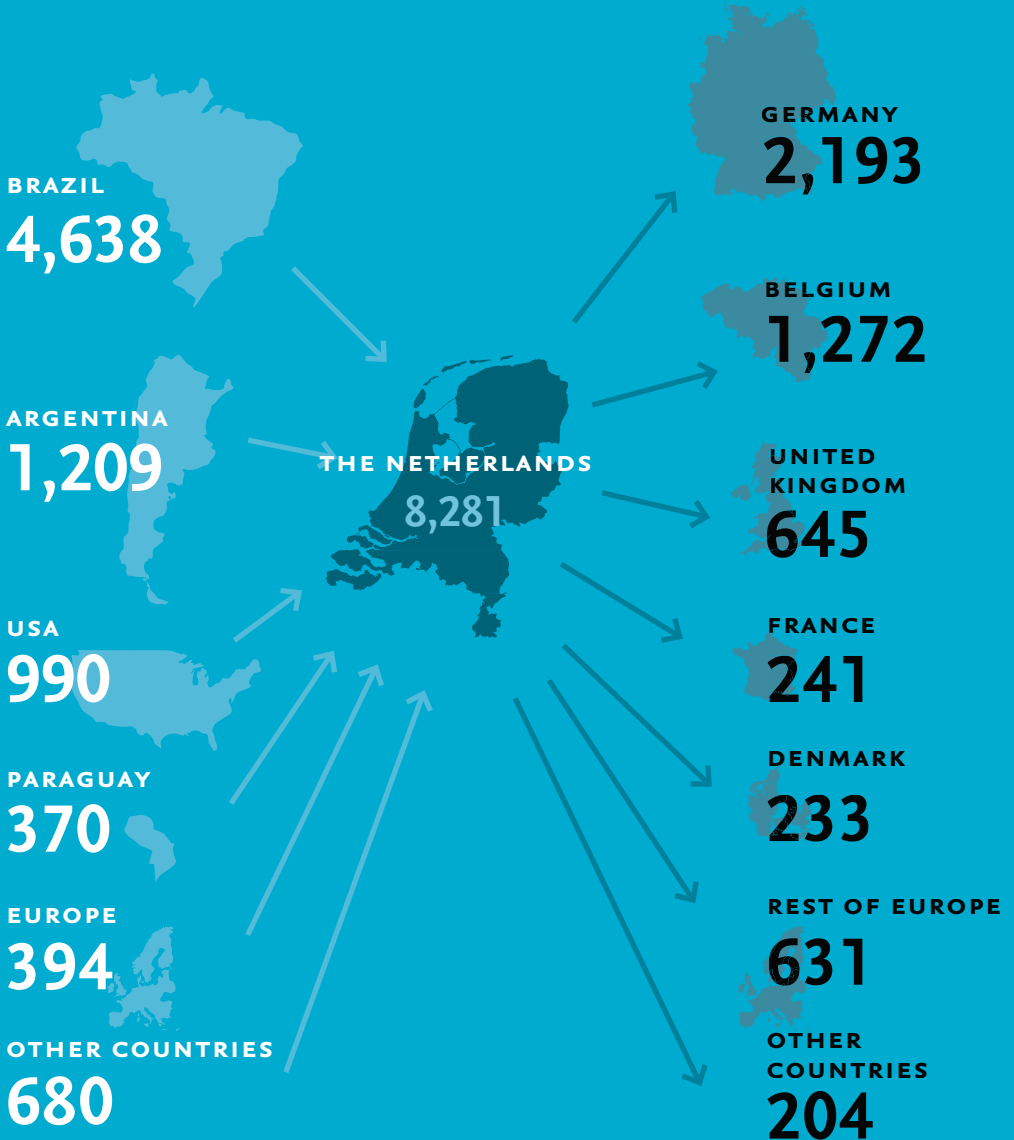
The amount of soy annually imported by the Netherlands requires a total surface for cultivation that is comparable to 80% of the Netherlands.

Of the 8.3 million tonnes of soy beans, -meal and -oil that entered the Netherlands in 2013 (unprocessed or crushed), 5.9 million tonnes (71%) were exported by the Netherlands to other countries (mainly in Europe). Of the 2.4 million tonnes that remained in the Netherlands, 2.1 million tonnes were processed into animal feed to eventually end up in products such as meat, dairy and eggs. Germany and Belgium are the largest consumers of soy and animal derived products from the Netherlands, followed by the United Kingdom, France and Denmark. More than 1 million tonne of soy is consumed in the Netherlands itself in a variety of forms.

Dutch ports, the meat- and dairy industries, and Dutch subsidiaries of multinational corporations profit from the transit of soy through the Netherlands and from the processing of soy into export products for the food- and livestock industries. This makes them co-responsible for the consequences of soy cultivation in soy producing countries. They should therefore demand minimum criteria on how this soy production takes place.

# DUTCH IMPORT AND EXPORT 2013

IN 1,000 TONNES OF SOYBEANS, -MEAL AND -OIL



# SOYBEAN PROCESSING

There are two major factories that process soybeans in the Netherlands. These so-called soybean crushing plants are owned by two of the biggest soy traders in the world: Archer Daniel Midlands (ADM) in Rotterdam and Cargill in Amsterdam. In 2013, some 2.4 million tonnes of soybeans were crushed in the Netherlands - 76% of all soybeans that were imported by the Netherlands.

Approximately 2.4 million tonnes of soy products were further processed in the Netherlands. The animal feed industry is by far the Netherlands' largest soybean processing sector. Soy meal – and to a lesser extent, soybeans and soybean oil – is a popular ingredient in animal feed, because the animals grow quickly due to the high protein content. Although most of the feed is used by Dutch farmers, a large proportion of the soy used in animal feed indirectly finds its way to other countries in Europe in the form of meat, such as pork and chicken, eggs and dairy products.

There are over 100 feed processing companies active in the Netherlands. The three largest are Agrifirm, ForFarmers and De Heus. In 2013, an estimated 17 million tonnes of fodder was consumed, with a soy content between 7 and 26%. The soy content in animal feed varies by sector. More than 2 million tonnes of soybeans were processed to produce this feed, more than a quarter of the total Dutch imports in 2013.

The poultry and pork sectors are the largest consumers of soy-based animal feed. Some 605 grams of soy is used to produce one kilo of chicken, 336 grams for one kilogram of pork and 400 grams of soy for one kilogram of beef. An average of 36 grams of soy is needed for the production of 1 egg of 60 grams. Major players in these sectors are Plukon (chicken), VION (pork) and the Interovo Egg Group.

# SOY FLOWS THROUGH THE NETHERLANDS 2008 2011 2013

IN 1,000 TONNES OF SOYBEANS, -MEAL AND -OIL



4,994



3,185



102



28  
crush losses



4,756  
soy meal



631  
soy beans



491  
soy oil



368  
pigs and pork



328  
poultry-  
and meat



255  
egg and  
egg products



202  
dairy products  
(milk, cheese, butter)



96  
food products  
(tofu, burgers)



26  
various meat products



25  
cows, beef  
and veal



22  
margarine,  
baking fats



6  
technical products  
(paint, cosmetics)



2008: 9,267  
2011: 8,711

**IMPORT** 2013

**8,281**

2008: 1,436  
2011: 1,138

**CONSUMPTION** 2013

**1,047**

2008: 7,766  
2011: 7,436

**EXPORT** 2013

**7,206**

# SOY CONSUMPTION IN THE NETHERLANDS

The Dutch consume about 13% of all soy imported into the Netherlands: more than 1 million tonnes. The majority of this soy is consumed in the form of meat-, egg- and dairy products. In 2013, the Netherlands produced more than 10 billion eggs, of which no fewer than 3.3 billion were consumed in the Netherlands, either directly or incorporated into finished products.

Of the 1.8 million tonnes of Dutch pork produced in 2013, almost 700,000 tonnes were destined for the Dutch market. The Dutch production of chicken meat has increased by 21% – from 762,000 to 920,000 tonnes – between 2011 and 2013. A large part of the additional production was for export, because the domestic consumption of poultry - 377,000 tonnes - remained virtually unchanged.

Most of the livestock products and foodstuffs containing soy reach Dutch consumers through retail channels. In fact, 59% of consumers buy their meat at the supermarket, compared to 4% who purchase meat at the butcher. Some 35% of the remaining meat reaches the consumer through the hospitality industry, offices and catering and 2% through other channels. Some 81% of sandwich meats are sold via supermarkets, but the sale of eggs takes the cake, with a supermarket sales share of almost 89%.

Supermarket chains play a leading role in the procurement and marketing of soy based products and are therefore a crucial link in finding ways to replace soy, in making soybean production more sustainable, or in reducing the consumption of animal proteins, the three Rs previously mentioned.



# CONSUMPTION IN THE NETHERLANDS & FARMLAND REQUIRED 2013

IN 1,000 TONNES



CONSUMPTION



SOY  
REQUIRED



10,000 football fields

FARMLAND REQUIRED  
SHOWN IN FOOTBALL FIELDS



# STANDARDS FOR RESPONSIBLE SOY

Various certifiable standards for responsible soy co-exist, however these standards may have different approaches to issues such as social- and environmental criteria. This raises questions about how and by whom these criteria are determined, how they are implemented and if and in what way they are (independently) audited. Below is an overview of the main differences:

The certification **GMO-free** indicates that no genetically modified soy was used in the entire chain. There are no other social or environmental criteria associated with this label. The control of non-GM is very strict.

Soy farmers that are certified **organic** may not use chemical pesticides, fertilisers or genetically modified organisms. There are also various requirements in the field of nature conservation, land and labour laws, and health and safety regulations. All stakeholders are involved in the standard and audits are strict.

In addition to organic farming criteria (see above), **EcoSocial**, a Brazilian hallmark, uses a number of social criteria aimed at improving the living conditions of the local population and small-scale farmers. These criteria may be audited via internal or external means.

The standard **Round Table on Responsible Soy (RTRS)** was created from an international platform of soy producers, traders, processors, banks and civil society organisations. The standard has strong social- and environmental criteria. One requirement is that as of 2009 no forest or other valuable natural resources may be destroyed. RTRS may be used for both GM and non-GM soy and there is strict control.

The **ProTerra** standard has strong social- and environmental criteria and certifies only non-GM. Furthermore, ProTerra prohibits farms where deforestation took place after 2004. Diverse stakeholders are now involved and external audits are required, but verification is less transparent than with RTRS. Because ProTerra allows only non-GM soy, it should be possible to track this soy separately.

## VOLUME OF CERTIFIED SOY PROCESSED IN THE NETHERLANDS

X 1,000 TONNES

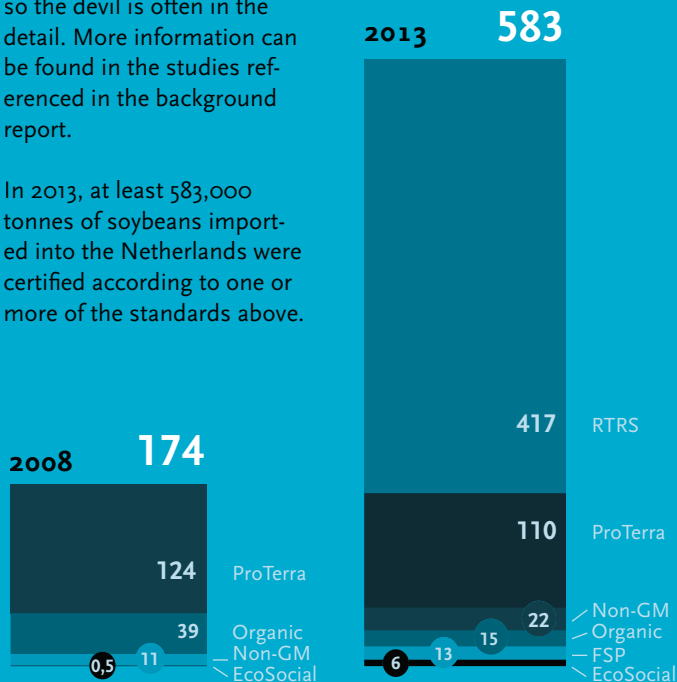
2015

2,400

The **ISCC** standard (International Sustainability and Carbon Certification) is not, or hardly, used in the Dutch food industry, but it is used for biofuels, such as soybean diesel. GM soy is allowed. The standard's social and environmental requirements are not as strict as those of RTRS and ProTerra. External audits are required, but farmers are also taken at their word. Since all EU-approved standards for biofuels – even the weaker ones – are accepted under the ISCC standard, it is uncertain whether they actually conform to ISCC criteria.

Change differences to devil, so the devil is often in the detail. More information can be found in the studies referenced in the background report.

In 2013, at least 583,000 tonnes of soybeans imported into the Netherlands were certified according to one or more of the standards above.



COMMITMENT

**100 %**  
RTRS SOY  
**2015**  
NETHERLANDS

# INITIATIVES AND PROGRESS

A number of Dutch companies have decided to start or join initiatives that encourage certified soy cultivation, sometimes in collaboration with civil society organisations.

In 2011, Dutch supermarkets, LTO Netherlands (an organisation that represents the interests of employers and businesses in the Dutch agricultural- and horticultural sectors), the Dutch Margarine, Fats & Oils Board, representatives of the dairy-, poultry- and pork sectors and a number of civil society organisations signed the **Covenant for Responsible Soy** (*Intentieverklaring Verantwoorde Soja*). In the statement, the parties agreed that by 2015 all soy used for the production of meat, dairy, eggs and other foods in the Netherlands, should be RTRS (or equivalent) certified.

In 2012, the business signatories founded the **Dutch Foundation for Chain Transition Responsible Soy** (*Stichting Ketentransitie Verantwoorde Soja*) to achieve the aforementioned goals. Of the 1 million tonne of RTRS soy that would be purchased in 2013 according to the letter of intent, 417,000 tonnes was realised.

Solidaridad and the RTRS have supported the **Farmer Support Programme** (FSP) since 2009, with the aim of supporting small-scale farmers to produce responsible soy and prepare them for certification. A number of Dutch companies support this programme. In 2013, 85,000 small-scale soy producers in South America, Asia and Africa received support, of which 17,000 were already producing 75,000 tonnes of RTRS soy in 2013.

IDH (The Sustainable Trade Initiative) has supported processors or buyers who invest in certifying soy with the **Soy Fast Track Fund** (SFTF) since 2012. In 2013, 21 projects in Brazil, Argentina and Paraguay received SFTF support to attain certification for 3 million tonnes of soy by 2015. Both the FSP and SFTF received financial support from the Dutch government.



4% 7% 25%

2008 2011 2013

**CERTIFIED SOY**  
IN THE NETHERLANDS

In 2006, Brazilian soy traders announced the **Soy Moratorium** and have since been working on its implementation with civil society organisations and the Brazilian government. As a result, in 2013 the Netherlands used no soy cultivated in deforested areas of the Amazon after July 2006.

In 2013, 5.5 million tonnes of soy was certified worldwide under a sustainability standard. This was 2% of the world's total soy production. That same year, the Netherlands purchased and processed 10% of this certified production (0.2%).

To ensure that soy is actually produced without causing social and environmental problems in the world, the share of certified soy must increase significantly and the standards should be continuously improved. Moreover, the implementation of, and compliance with, the rules should be independently and thoroughly audited.

**TOWARDS**



**100 %**  
**RTRS SOY**  
**2015**  
NETHERLANDS



# EUROPEAN SOY USE AND PROTEIN DEPENDENCY

The consumption of meat, dairy and eggs is rising in Europe. The per capita consumption of meat in the Netherlands is more than 80 kilos a year (the global average is 43 kg). European livestock requires an increasing amount of protein-rich animal feed, but instead of producing more protein-rich crops, the European production of these crops has actually decreased in the last decade. Protein-rich crops, such as soy, are imported from other parts of the world, because it is more economically attractive to do so. European farmers also grow few protein-rich crops because soy from South America is cheaper, and because other crops such as wheat and corn yield more.

Currently, cultivation of protein-rich crops in the European Union supplies only 20-30% of the protein supply in the food, and only a small percentage of this is soy. More than 31 million tonnes of soy is used in Europe each year, of which only 3.6% is produced in Europe. Currently, some 1.1 million tonnes of soybeans are grown on 417,000 hectares of farmland across 28 EU countries – a fraction (0.4%) of the global soybean production.

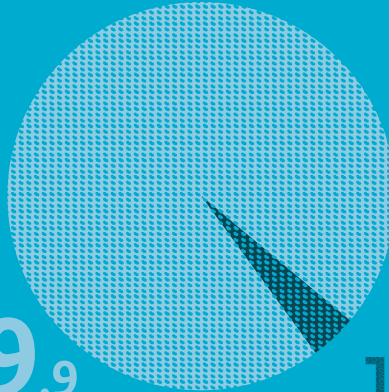
Thus, Europe is highly dependent on other continents for its protein supply. An additional effect is the risk that agricultural land in South America becomes impoverished, while nutrients accumulate in European soils. Because the Netherlands imports so many raw materials – such as soy – it even has a nutrient surplus, also known as a manure surplus.

Europe could become less dependent on the import of soy and contribute to the reduction of the negative impacts of soy production by taking the cultivation of protein-rich crops into its own hands.

EUROPE PRODUCES LITTLE SOY

31

EUROPE USES 31 MILLION TONNES OF SOY,  
BUT PRODUCES ONLY 1.1 MILLION TONNES DOMESTICALLY



29.9

MILLION TONNES

1.1

MILLION TONNES



# REPLACEMENT OF IMPORTED SOY

The production of protein-rich crops in Europe could have the added benefit of making European soil even more fertile, because crops such as peas, lupines and soy bind atmospheric nitrogen to the soil. They need less (artificial) fertiliser and crops that are subsequently grown on the same land can be grown with less manure. Another advantage of growing protein-rich crops in Europe is that it will close the so-called nutrient cycle, which means that the nutrients from the soil can be reused for the cultivation of new crops.

Europe is in the process of looking for sustainable alternatives for its soy imports. A production level of 3.1 tonnes of soy per hectare would already be competitive with South American soy and would reduce the fodder footprint. Europe should, however, heed the pitfalls of soy production: it must not take place at the expense of other crops or natural resources, as is the case in other production countries. There are several initiatives to increase European production, such as “Danube Soy”, cultivation trials in the Netherlands and initiatives in France, Germany and Sweden. In 2013, Friends of the Earth Netherlands organised a cheese production initiative called *Kleine Hoefprint* (“**Little Hoof Print**”), which was based on the use of regionally grown fodder.

There are also other possibilities besides soy cultivation. Bone meal has almost the same nutritional properties as soy fodder and a low carbon footprint. The sustainable production of algae, duckweed, insects and synthetic amino acids could also contribute to the protein values in fodder.

All Dutch parties in the soy chain, including the Dutch government, can play an important role in the development of opportunities to replace imported soy; by investing in research into alternatives, for example, and buying from national and regional suppliers. Should these measures ultimately lead to a loss of market share and income for small-scale soybean farmers in South America, stakeholders should jointly look for possible sustainable alternatives and solutions.



## EFFECTS OF SOY ON FARMLAND



### SOUTH AMERICA

INCREASING SOYBEAN  
PRODUCTION



RESULTS IN  
A DEFICIENCY  
OF NUTRIENTS  
= DEPLETED SOIL



### EUROPE

MANURE SURPLUS



## POTENTIAL AGRICULTURAL LAND AVAILABLE IN EUROPE

**0.5** million  
hectares used for  
soybean cultivation.



**2.4**  
million hectares of  
agricultural land available  
for the European cultivation  
of protein-rich crops.

# CONCLUSION

In 2013, 276 million tonnes of soybean was grown worldwide in an area the size of France and Spain combined, most of it in the United States, Brazil, Argentina and China. More than 11% of the world's soy production ends up in the European Union, of which the Netherlands is the largest soy importer.

The global demand for soy is increasing, but soy production has negative effects on natural resources and local populations. We use a lot of soy in Europe, but we hardly produce any ourselves. To prevent the negative effects of soy production, we should import less soy and only responsible, certified soy.

In 2013, only 2% of all the soy produced worldwide was certified under a sustainability standard. **Of the 2.4 million tonnes of soy that was used in the Netherlands in 2013, 25% was certified, compared to 7% in 2011. The target of 100% by 2015 is therefore not yet in sight.**

In addition to using certified soy, efforts are being made to cultivate soy and other protein-rich crops on European soil. Making soy cultivation in the Netherlands and Europe a truly sustainable and profitable endeavour requires further development.

Real change requires political and corporate will in both producing- and consuming countries. The Netherlands and Europe must seriously invest in domestic soy cultivation, realise a drastic reduction in the consumption of animal proteins and commit to purchasing certified soy. In addition to the current voluntary agreements, strict, enforceable rules must be established. Monitoring compliance with laws and regulations must become much stricter in producing countries.

The Dutch Soy Coalition urges the government of the Netherlands and Dutch companies to put considerable extra effort into ensuring that the soy we use and trade in the Netherlands – both in products for the Dutch market and for export - has no negative impacts in producing countries.

## SOURCES

Soy Barometer 2014, A Research report for the Dutch Soy Coalition, Profundo Research and Advice, September 2014



Observatorio Socioambiental de la Soja  
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## TEXT

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The Dutch Soy Coalition consists of eight Dutch organisations: Both ENDS, IUCN Netherlands Committee, Milieudefensie (Friends of the Earth Netherlands), Oxfam Novib, Solidaridad, Natuur & Milieu, World Wild Fund for Nature and Wetlands International.

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