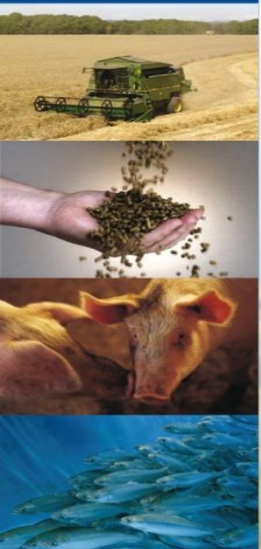


Responsible Soy Sourcing – The FEFAC Soy Sourcing Guidelines

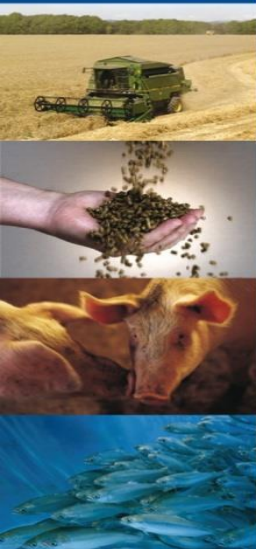
Anton van den Brink
FEFAC Senior Policy & Communication Manager

EU Fishmeal Sustainability Workshop
Copenhagen, 25 October 2019



Who is FEFAC?

- European Association of Compound Feed Manufacturers
- Founded in 1959
- 23 EU Member Associations and 9 associate/observer members
- 163 mio. T of industrial compound feed production in 2018
- Committee on Fish Feed Production chaired by Ole Christensen (Biomar)



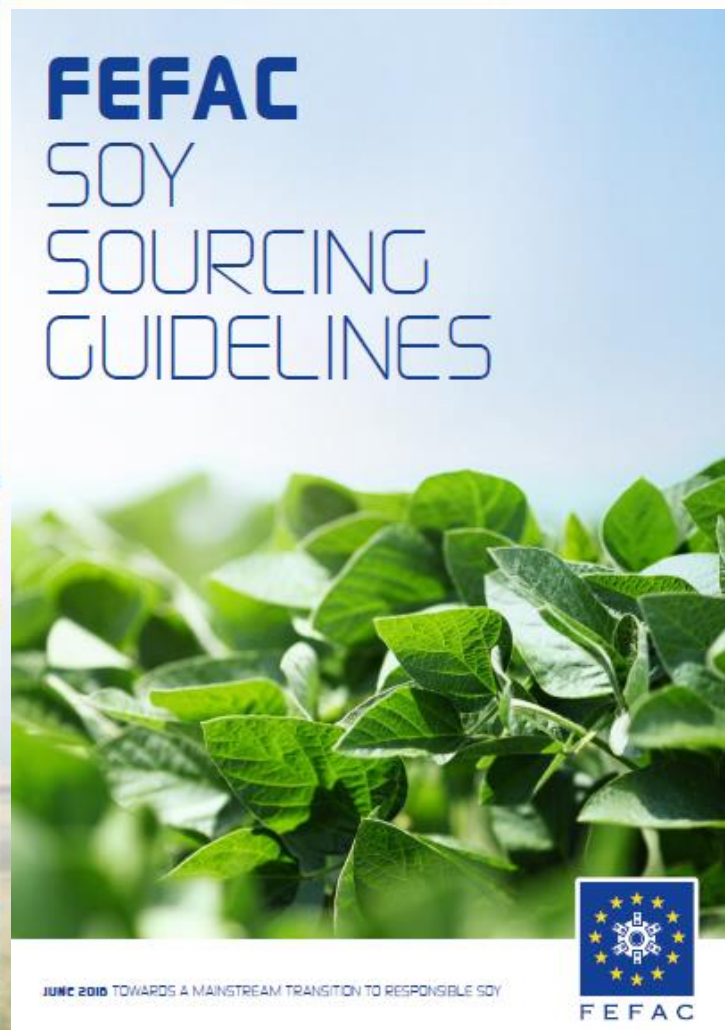
FEFAC engagement on aquaculture



European Aquaculture
Technology and Innovation Platform

The logo includes a stylized map of Europe on the right, colored in shades of purple, blue, and green. The text 'European Aquaculture Technology and Innovation Platform' is centered below the map.

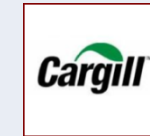
FEFAC and Responsible Soy



3 Farmer Programmes



6 Company/Trader Programmes



2 Member Schemes



7 'Other' Programmes



Content – 59 Criteria spread over 6 themes

- Legal Compliance
- Responsible Working Conditions
- Environmental Responsibility
- Good Agricultural Practices
- Respect for Legal Use of Land Rights
- Protection of Community Relations
- 37 essential criteria and 22 desirable criteria
 - At least 5 desirable criteria must be met



Key elements to FEFAC Soy Sourcing Guidelines

- Not a new standard!
- Existing schemes voluntary apply for a benchmark against the SSG to determine whether they meet the feed industry requirements
 - Benchmarking is performed independently by the International Trade Centre (ITC – WTO Subsidiary)
- FEFAC does not purchase any soy. Intention is to create market transparency and help operators choose what to buy when it comes to “responsible soy”
- SSGS have been FEFAC’s tool in the discussion on deforestation
 - Current version only considers “illegal deforestation”



Problem solved? Sustainability is a moving target

- Downstream market demand for “responsible soy” has not really materialised across the different EU countries
- Political and market reality is increasingly gearing towards “deforestation-free supply chains”
- Question we are facing: Is ‘deforestation-free’ a subset to “certified responsible soy”?
- Or is the EU in fact using more ‘deforestation-free’ soy than “certified responsible soy”? (e.g. soy sourced under Amazon soy moratorium contracts, ‘low deforestation risk’ origins such as US, Canada, Ukraine)



Guilty if not certified?

- IDH-IUCN Soy Monitor 2017 estimations
- “13% of soy used in Europe covered by a ‘deforestation-free certification scheme’”
- “22% of soy used in Europe covered by scheme benchmarked against FEFAC SSG”

European soy use



about

85%

NOT VERIFIED
deforestation free

European soy use



about

75%

is NOT controlled
for illegal deforestation

Challenges for fish meal, similar to soy

- Fish meal also a demonized commodity
- Particularly since Amazon Fires soy (or at least South American soy) soy is being pushed towards 'palm oil status' in public perception
- Meaning: certification in certain cases no longer good enough for the market to get out of trouble
- Going "fish meal / soy free" often presented as the automatically better / more sustainable option (regardless of the origin!)
- A true shame: Investment in sustainability in 3rd countries often made for the European market



Opportunity: Drive for protein sources of EU origin

And nutritionally a highly valued source!

May 2019

EU Feed Protein Balance Sheet

2017/18	Million tonnes						Protein content (feed use) (G)	Million tonnes (crude protein)			% of total feed use
	Protein source	Total EU production (A)	EU imports (B)	EU exports (C)	Total EU Domestic Use (D) = (A) + (B) - (C)	EU total feed use (E)		Feed use EU origin (F)	EU total feed use (H) = (E) * (G)	Feed use EU origin (I) = (F) * (G)	
NON-PLANT SOURCES					9.1	9.1		2.52	2.49	99%	3%
(excluding on-farm use)											
Fish meal	0.4	0.2	0.1	0.5	0.5	0.1	65.0%	0.32	0.29		
Whey powder	1.9	0.1	0.7	1.3	0.9	0.9	12.5%	0.11	0.11		
Skimmed milk powder	1.6	0.0	0.8	0.9	0.2	0.2	34.0%	0.05	0.05		
Processed animal proteins				3.1	2.6	2.6	60.0%	1.56	1.56		
Former foodstuff					5.0	5.0	9.5%	0.48	0.48		

https://ec.europa.eu/info/news/commission-publishes-overview-eu-feed-supply-2019-may-20_en

Resource efficiency champions

Co-products, an essential part of animal nutrition



Other co-products

Fish trimmings

These include the food-grade parts left over after fish has been filleted, along with the frames (heads and backbones) and the viscera. Collectively, they make up about 54% of the fish meal used in Europe (2016, IFFO).



Thank you for your attention!



@FEFAC_EU

FEFAC

Fédération Européenne des
Fabricants d'Aliments Composés

Europäischer Verband
der Mischfutterindustrie

European Feed
Manufacturers' Federation

