

RTRS HEADLINES

2019

Looking beyond 2020

The Round Table on Responsible Soy Association (RTRS) closes another year marked by sustained growth

FACILITATING THE GLOBAL DIALOGUE ON SOY

As a global multi-stakeholder soy platform, RTRS has made significant progress



RTRS Annual Conference 2019



 **Utrecht**
The Netherlands

 **+270**
participants

 **150**
organizations

Hosted by
Rabobank

 **20**
countries

 **44**
speakers

 **10**
sponsors



Task Forces



2

Brazilian Task Forces



+30

organizations



35

participants

Representing the
local soy value chain



Building on the initiatives implemented to date and to further empower its mission as a global multi-stakeholder platform, RTRS has convened the **Collaborative Soy Initiative**, bringing together certification standards, companies, NGOs and experts in support of a common objective: 100% sustainable soy globally.

Operating as a multi-stakeholder platform

In recognition of RTRS as a multi-stakeholder platform on soy and its value in the soy value chain, RTRS was invited to participate in several key conversations:

MARCH



RTRS was invited by the **United Nations** to become an official signatory of the **Declaration on “Gender-Responsive Standards and Standards Development”**.

OCTOBER



RTRS participated as expert on the panel **“Ways forward - Overcoming Implementation Challenges”** at the **Sustainable Consumption for Biodiversity and Ecosystem Services Worldwide Conference**, held by the **Federal Ministry for the Environment, Nature Conservation and Nuclear Safety** in Berlin, Germany.

DECEMBER



RTRS participated in the **European Union Agricultural Outlook Conference**, entitled **Sustainability from Farm to Fork**. It was organized by the **Directorate-General of Agriculture and Rural Development** in Brussels, Belgium.

Promoting the growth of production, trade, and use of responsible soy

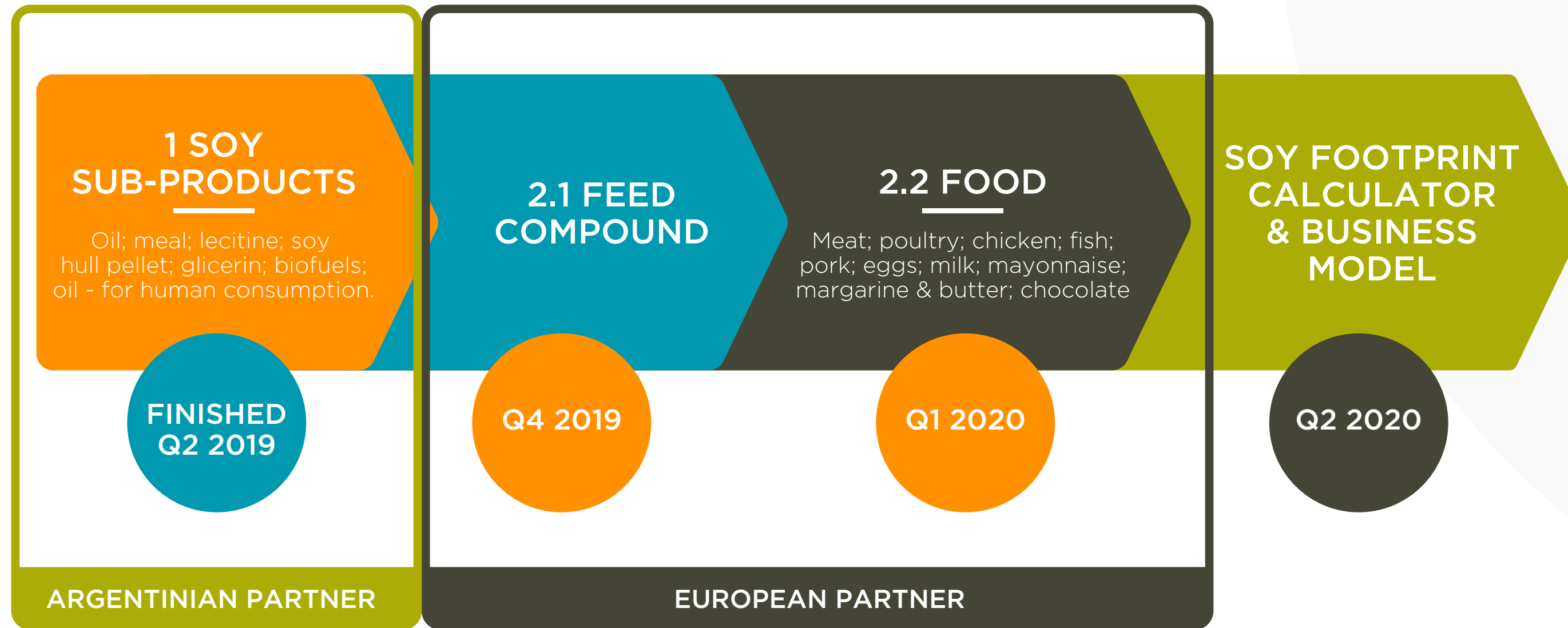
RTRS is also making headway on two relevant fronts: **measurement of Greenhouse Gases (GHGs)** and **the RTRS Conversion Factors System & Soy Footprint Calculator**.

We have also begun an analysis of different tools available in the market to **measure GHGs**, with a view to assessing the impact of RTRS certification at farm level with regards to carbon emissions and sequestration.

The chosen tool to measure GHGs will ensure it provides a representative, multisectoral perspective.

RTRS is also reviewing the **RTRS Conversion Factors System** to develop an enhanced **Soy Footprint Calculator**, which will help companies and organizations in general calculate the volume of soy used in various applications, such as food, feed and byproducts.

The first phase, carried out by the Agribusiness School of the Austral University (Argentina), was completed in 2019. It included research and development of a conversion factor system for the main industrial soy byproducts (oil, meal, hull, lecithin and biofuels) based on an analysis of industrial processes.



The second phase of the RTRS Conversion Factors System is being developed into the RTRS Soy Footprint Calculator. British consultant 3Keel is RTRS’s partner in this second phase.

RTRS Conversion Factors System –which defines conversion factors for soy byproducts, feed and food products– and the RTRS Soy Footprint Calculator tools will give members access to valuable references when calculating their own soy footprints for the purchase of RTRS-certified material.

The RTRS Soy Footprint Calculator will represent a win-win situation for the entire supply chain.

A tractor with a sprayer attachment is shown working in a field of green crops. The tractor is positioned in the middle ground, moving from left to right. The field is filled with dense, green plants. The sky is a uniform, hazy yellowish-green color. The overall scene is bathed in a warm, golden light.

CERTIFICATION

Here's a look at RTRS's market performance

RTRS sustainable sourcing

 **+5,400**
producers certified
against the RTRS Production Standard in 2019

 Around
1 million
hectares certified
worldwide

Based on partial results reported for 2019 at the time this document was being drafted, RTRS-certified producers account for about **4 million tons of certified soy production** in Latin America (Argentina, Brazil, Paraguay, and Uruguay), and Asia (China and India) Brazil is the largest RTRS producer, with **3.3 million certified tons**.



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Buenos Aires, Argentina



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Buenos Aires, Argentina

ZERO MEANS ZERO

In October, RTRS launched a new campaign focusing on informing audiences about valuable ways to drive impact on the ground: **#ZeroMeansZero**. This campaign has demonstrated that it is possible to meet the growing global demand for soy and, at the same time, preserve native vegetation and protect human rights by improving worker conditions. **#ZeroMeansZero** is based on the premise that it is possible to have forest and food and human well-being.



New members

12
members joined
RTRS in 2019

With them, three new countries: Canada (Restaurant Brands International - RBI), Spain (Vall Companys) and USA (Tyson Foods, Inc).

The organizations that RTRS welcomed on board last year see the Association as a credible partner and a place to work collaboratively towards responsible agricultural and business practices to drive their strategies forward and achieve sustainability goals.

Industry, Trade and Finance



Civil Society



Observers



RTRS sustainable soy purchase

3,950,000 tons
of certified soy sold
(credits and mass balance)

41%
sales increase
vs 2018

33
new buyers
of RTRS-certified soy

+550k tons
of RTRS physical flow was sold
+75% vs 2018

423k tons
allocated to the biofuel market
+156% vs 2018

Several leading brands —including Arla, Lidl and Unilever— continued to prove their long-term commitment to RTRS and sustainable agricultural practices with the purchase of a total of **810k tons of RTRS certified material**. Forfarmers, Agrifirm and DeHeus purchased **625k tons of RTRS credits**, reflecting the feed industry’s ongoing commitment to RTRS.



338k
tons
for biofuels



256k
tons



180k
tons



330k
tons



224k
tons



155k
tons



280k
tons



190k
tons



155k
tons

33 new buyers

began to purchase RTRS-certified material

Tesco, Vall Companys, Tyson Foods and Nestlé purchased almost 160k RTRS credits. In terms of physical material, Cereal Docks, and ADM International purchased 423k tons with Bunge Iberica as well.

Italian company Cereal Docks became the first European processing plant certified in RTRS's Chain of Custody standard.

RTRS Credits



©CerealDocks Marghera plant

Mass Balance - RTRS Biofuels



©CerealDocks Marghera plant

Global reach

Countries that purchase RTRS Soy

From the uptake perspective, it is important to highlight the annual positive trend in the “buyers map.”

According to RTRS records, in 2016 and 2017, the Netherlands was by far the leading country in RTRS-certified material (RTRS credits) uptake worldwide, accounting for 66% of the total. In 2018, the percentage of RTRS-certified material uptake in the Netherlands significantly decreased to 40% of the total; in 2019, it was **30%**. Many countries including Scandinavian region and the United Kingdom increased their participation and commitment to RTRS-certified material. With smaller volumens, new buyers from Ireland, Japan, Vietnam, and USA dabbled in the RTRS-certified material field.



Widening the scope

We are committed to upholding RTRS as a “state-of-the-art” multi-stakeholder certification scheme and we will continue to work to make it increasingly more robust.

Last June, the 13th General Assembly of the RTRS approved the inclusion of **Chain of Custody requirements for producers** as part of all audits as of 2020. This means that 100% of what will be produced from 2020 onward can be sold through the physical flow modality as well, depending on market demand. This will allow players to increase the uptake of certified physical soy along the value chain.

Considering the environmental and agronomical benefits of crop rotation, a practice that responsible soy producers are required to implement under the RTRS Production Standard, RTRS began developing the **“RTRS Standard on Responsible Corn Production”** in 2019. Once approved by the RTRS General Assembly, in late 2020 RTRS-certified soy producers will be able to certify their corn production, adding RTRS-certified corn to the responsible supply chain.

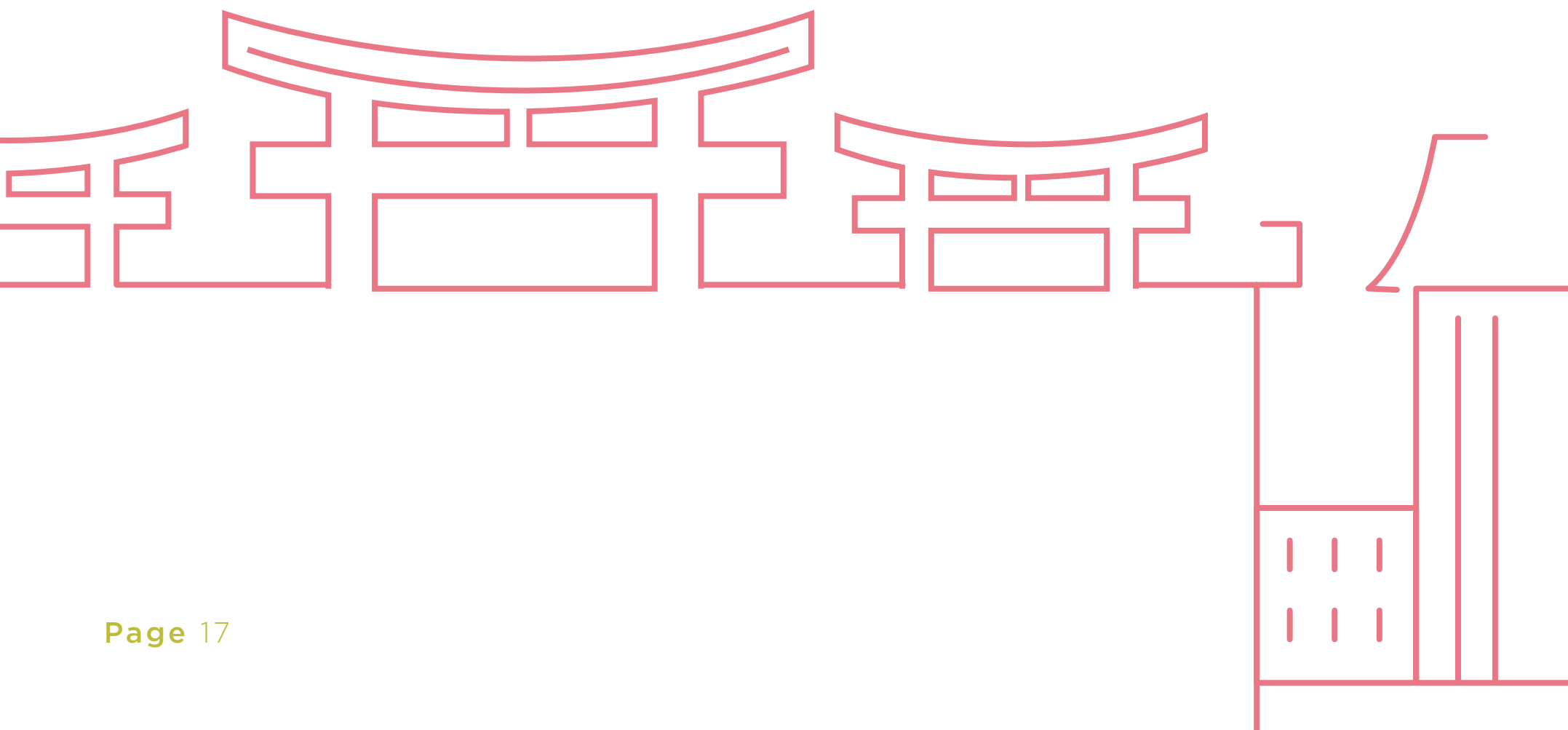


The new standard, like the one for soy, will be based on the five basic RTRS certification principles: legal compliance and good business practices; responsible labor conditions; responsible community relations; environmental responsibility and good agricultural practices.

Towards the end of 2019, RTRS applied for ISEAL Community Member, to later apply for and achieve full ISEAL membership. This has prompted the association to develop an outline of RTRS's Theory of Change (ToC) and create a Monitoring and Evaluation (M&E) System. RTRS's ToC sets short, medium and long-term objectives for social, agronomic and environmental issues, whereas the M&E system collects information from RTRS-certified producers to quantitatively estimate the impact of certification on the ground. It will also provide stakeholders in the soy value chain with quantitative information about the economic, social and environmental benefits of sourcing sustainably-produced soy.



The year culminated with the RTRS Production Standard being recognized as compliant with the Sustainable Sourcing Code for Agricultural Products by the Tokyo 2020 Organizing Committee of the Olympic and Paralympic Games. After a year of hard work, approval of RTRS's application marks a significant first step in the Japanese market.





We recognize all your collective efforts to make these good outcomes come true **and we invite you to be an active partner of RTRS during our 2020 journey.**

responsiblesoy.org

