SOY EUROPEAN TASKFORCE
Conference Call
10th November 2015
1 – 3 PM GMT, 2 – 4 PM CET
AGENDA

- **Belinda Howell**, RTRS European Task Force Chair and vice-president - Introduction
- **Marcelo Visconti**, RTRS Executive Director - Welcome
- **Olaf Brugman**, RTRS President – European Soy Strategy Syntegration
- **Lieven Callewaert**, RTRS Europe Representative – Task Force Europe update
- **Sandra Mulder**, WWF update
- **Juliana Lopez**, AMAGGI – Responsible Soy Production & Task Force Brasil update
- **Christophe Calu-Mérite**, Feed Alliance – Perspective from the Feed industry
- **Augusto Friere**, ProTerra Foundation – Non-GMO Soy update
- **Belinda Howell**, RTRS Executive Board – RTRS Standard Review
OPENING AND WELCOME

Belinda Howell, European Task Force Chair
Retailers’ Soy Group representative; RTRS Executive Board member

COMPETITION STATEMENT

"Today, we are meeting as members of the Round Table on Responsible Soy. We take competition compliance seriously. Whilst discussions can cover matters of interest to our industry, we cannot discuss or exchange sensitive commercial information.

If at any time during this meeting, you think our discussions may be in breach of competition rules, please inform the Chair. The Chair may close the meeting at any time if s/he believes that discussions are in breach of competition rules."
WELCOME TO THE NEW EXECUTIVE DIRECTOR

Marcelo Visconti, Executive Director

INTRODUCTION AND BACKGROUND
SYNTTEGRATION

Olaf Brugman
RTRS President & Rabobank

FUTURE STRATEGY FOR RESPONSIBLE SOY IN EUROPE

Strategy Syntegration Workshop
Malik Institute St. Gallen (Switzerland)
26-29 January 2016
UPDATE TASK FORCE EUROPE

Lieven Callewaert, RTRS European Representative

UPDATE ON THE EUROPEAN MARKET

Membership Update
European Market Uptake 2015
RTRS Seminar Italy (Bologna)
UPDATE TASK FORCE EUROPE

Production & Sales of RTRS & non-GMO certified Responsible Soy

1,396,125 tonnes MB & Credits available
### New members 2015 - non europeans

<table>
<thead>
<tr>
<th>Names</th>
<th>Country</th>
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<tr>
<td>Agrex do Brasil</td>
<td>Brazil</td>
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<tr>
<td>Dandong Lao Dongbei Agri-Husbandry Co., Ltd</td>
<td>China</td>
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<td>Woolworths Holdings</td>
<td>South Africa</td>
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<td>Teamfood Colombia S.A.</td>
<td>Colombia</td>
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<td>World Resources Institute</td>
<td>US</td>
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<td>Associação Amigos da Terra</td>
<td>Brazil</td>
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<td>Canadian Seed Institute</td>
<td>Canada</td>
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<td>Alligare Gestão Empresarial</td>
<td>Brazil</td>
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<td>Semear Engenharia Agronômica</td>
<td>Brazil</td>
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<tr>
<td>Cerquality Consultoria em Sustentabilidade e Certificação Ltda</td>
<td>Brazil</td>
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<td>Bio3 Consultoria</td>
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### New members 2015 - europeans

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<th>Names</th>
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<tr>
<td>De Heus Voeders B.V.</td>
<td>The Netherlands</td>
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<td>Meat Friends Roosendaal B.V</td>
<td>The Netherlands</td>
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<td>Dutch Protein &amp; Services BV</td>
<td>The Netherlands</td>
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<td>DMK Deutsches Milchkontor GmbH</td>
<td>Germany</td>
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<td>Martin &amp; Servera AB</td>
<td>Sweden</td>
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<td>Hankkija Oy (Netherlands)</td>
<td>The Netherlands</td>
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WWF UPDATE

Sandra Mulder, WWF Netherlands

WWF SOY SCORECARD 2016
RESPONSIBLE SOY PRODUCTION

Juliana Lopez, RTRS Task Force Brazil (representing Gisela Introvovini – TFB Chair)

- CERTIFIED SOY PRODUCTION
- TASK FORCE BRASIL UPDATE
  - RT11 – BRASILIA
**UPDATE ON TASK FORCE BRAZIL WORK**

- Participation in producers and producers association events to increase knowledge about RTRS and to have more members
- Visit to companies and producers that wants to certify and understand the benefits of RTRS
- Participation at National Soy Congress (June 22-25th) organized by EMBRAPA (2000 participants)
- RTRS Auditor Course in São Paulo (June 30th – July 3th)
- Communication Agency is now working in Brazil
- P&C’s TFB Meeting

**10th TFB – RTRS MEETING (Oct. 2015)**

- The Future of Agriculture in Brazil

- Some themes and presenters: Risks for Brazilian Agriculture (World Bank) / Crop-Forest-Cattle Rotation (Embrapa) / Biological Control (BUG)
- Communication Workshop – Alfapress
- RTRS 11th International Conference: discussions and suggestions
PERSPECTIVE FROM THE FEED INDUSTRY

Christophe Calu-Mérite, RTRS Executive Board member
Groupe AVRIL (Feed Alliance) – Representative FEFAC

PERSPECTIVE FROM THE FEED INDUSTRY

UPDATE ON FEFAC GUIDELINES
EU MARKET INTEREST IN SUSTAINABLE SOY

THE FRONT RUNNERS:
- Holland ↔ Nevedi
- Belgium ↔ Bemefa

THE BUNCH:
- United Kingdom and Ireland (Irish Board)
- Denmark, France, Germany (non gm)
- Italy (leader = Veronesi)

THE LATECOMERS: South & Central countries
FEFAC VISION ON SUSTAINABILITY:

- need of a baseline requirements for the feed industry in Europe
- need to be connected to the trade world (Abiove, Fediol, Coceral, etc...)
- Fefac makes recommendations, not rules
- wants to leave the choice to the customer between all the different programs

⇔ ITC benchmarking process
UPDATE ON FEFAC SOURCING GUIDELINES

ITC CUSTOMISED BENCHMARKING SYSTEM:

- programmes submitted: **12** (so far)
- programmes which successfully passed the initial benchmarking review: **9**
  * producers: USSEC-ssap; AAPRESID-ac
  * traders: Cefetra-CRS 2.0; ADM-RSS; Cargill Triple-S
  * Fefac members: Bemefa; AIC-Femas
  * standards: **RTRS**
Augusto Friere
Proterra Foundation

- Welcome to Graham Mitchell, Executive Director
- Update on supply and demand for Non-GMO certified soy
NON-GMO SOY - AVAILABILITY & FORECAST

AVAILABILITY AND FORECAST

Metric Tons - Non-GMO Beans

- 2013: 2,960,000
- 2014: 2,445,698
- 2015: 3,635,000
- 2016: 4,000,000

ProTerra Foundation

RTRS
Belinda Howell, European Task Force Chair
RTRS Executive Board member

RTRS PRODUCTION STANDARD REVIEW

• Public consultation period for the Standard for Responsible Soy Production criterion 4.4 closes 15 November 2015 – please respond!

• Call for Standards Review Working Group members – Industry Trade & Finance constituency
Belinda Howell, European Task Force Chair
RTRS Executive Board member

**RTRS ANNUAL PROGRESS REPORTS**

- Call for reports and template open from w/c 4 January 2016
- Deadline for completed reports 1st April 2016
TASK FORCE EUROPE – NEXT STEPS

26 November 2015
RTRS Workshop Italy

How compliance to Sustainability will influence the Competitive advantage in the Food and Feed industry

VENUE
Hotel Bologna Fiera
Piazza della Costituzione 1 - 40128 Bologna
tel. +39 051 41666 - fax +39 051 41665

13h30 – 17h00

REGISTRATION
Please, register before the 11th of November 2015 via RTRS or GMP+International website
THANK YOU!

ANY OTHER BUSINESS?

THANK YOU!
for your participation