



# Sustainability and U.S. Soy Impact and business drivers

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COLLEGE VOICES

# The environment is Gen Z's No. 1 concern – and some companies are taking advantage of that

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## MILLENNIALS AND GEN ZS FEAR BUSINESS LEADERS ARE NOT CURRENTLY FOCUSED ON PROTECTING THE ENVIRONMENT.

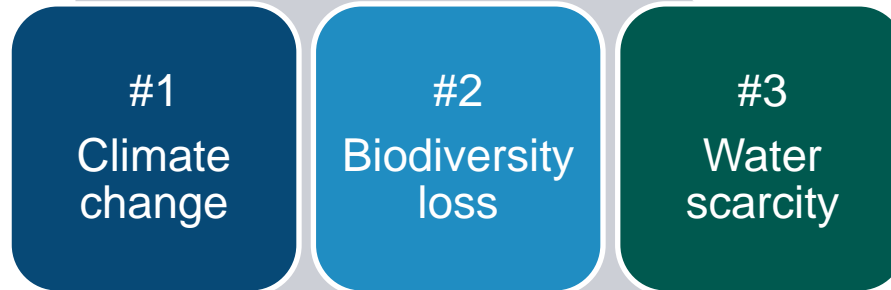
60% of all respondents fear business will deprioritize combatting climate change in the aftermath of the pandemic.



# Global Food and Retailer Company Perspectives



Responsible Sourcing Requirements and Guidance in Place to Address....



- Responsible Sourcing May Include...
- Certified and/or Benchmarked by Other Organizations
  - Assessed as Compliant by Third Party
  - Sourced From Low-Risk Countries
  - Verified through other Programs (SSAP, RTRS)

All 4 Companies have Regenerative Agriculture initiatives.





# Japan has the highest number of supporters of the Task Force on Climate-related Financial Disclosures (TCFD)

<b>Japan</b>	<b>527</b>
UK	384
US	345
Australia	125
France	117

Source: Task Force on Climate-related Financial Disclosures 2021 Status Report





# SDGs & Environmental Impact

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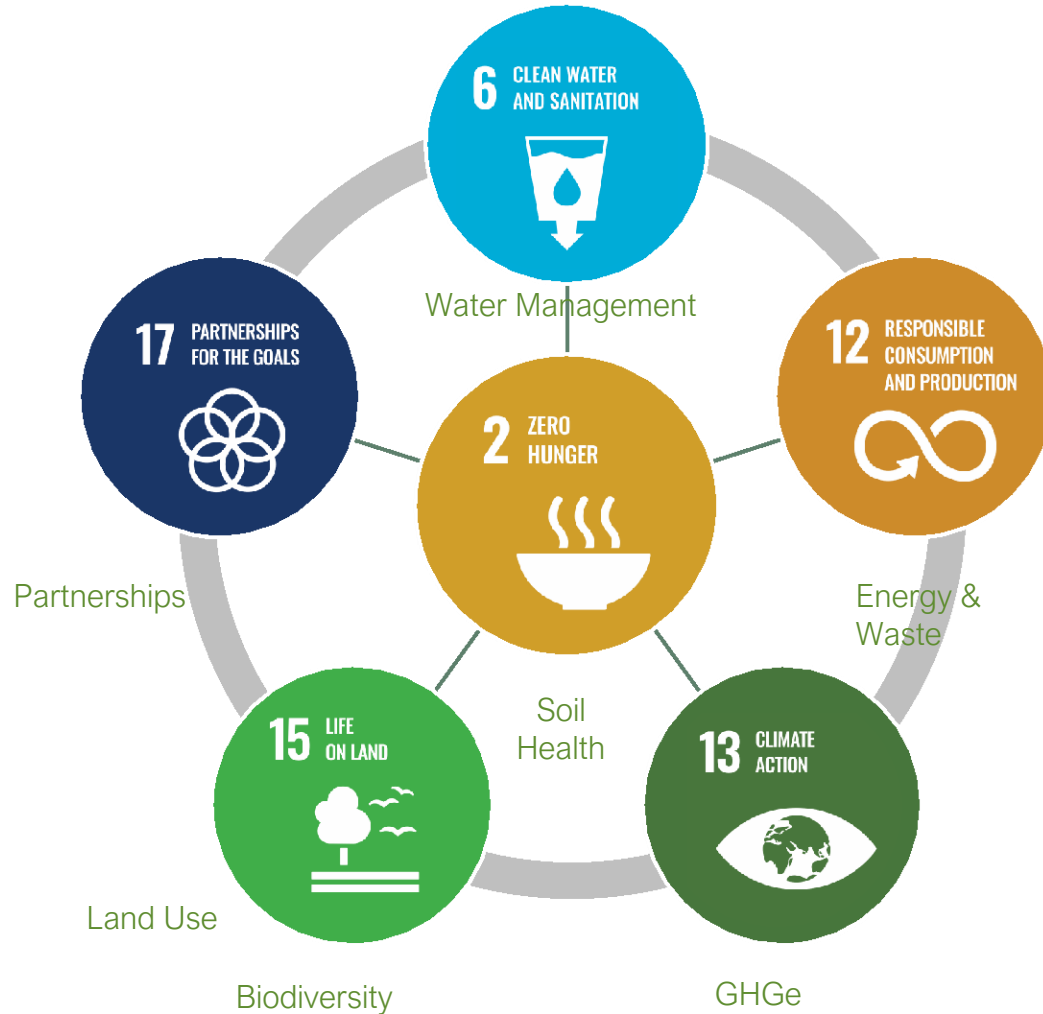


# U.S. Soy advances Nutrition & Food Security, Climate-forward Solutions, and Progress for People and Communities

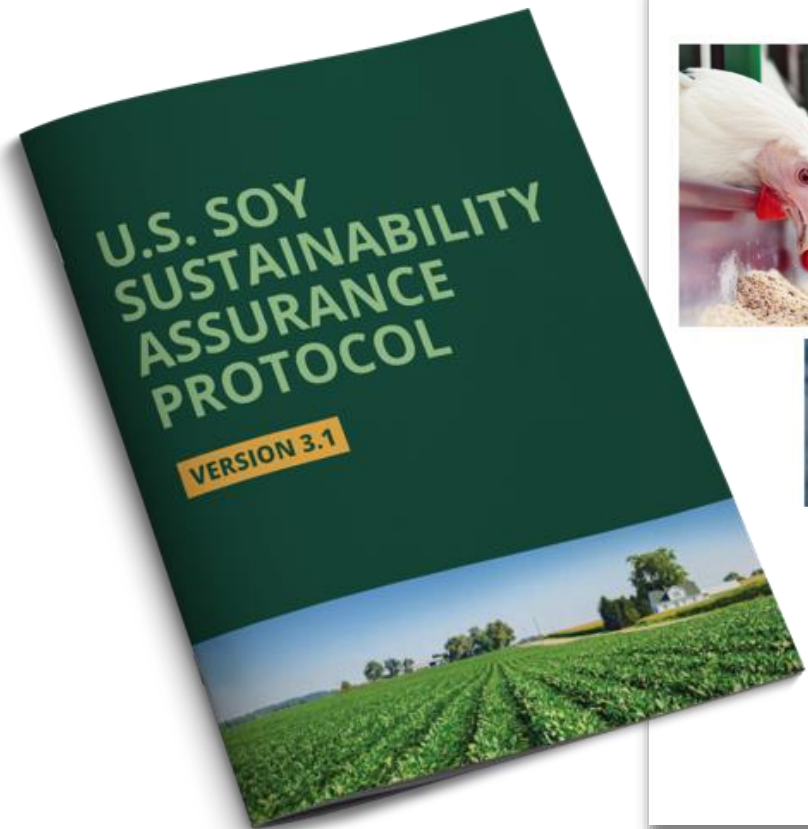


## SDG 2.4

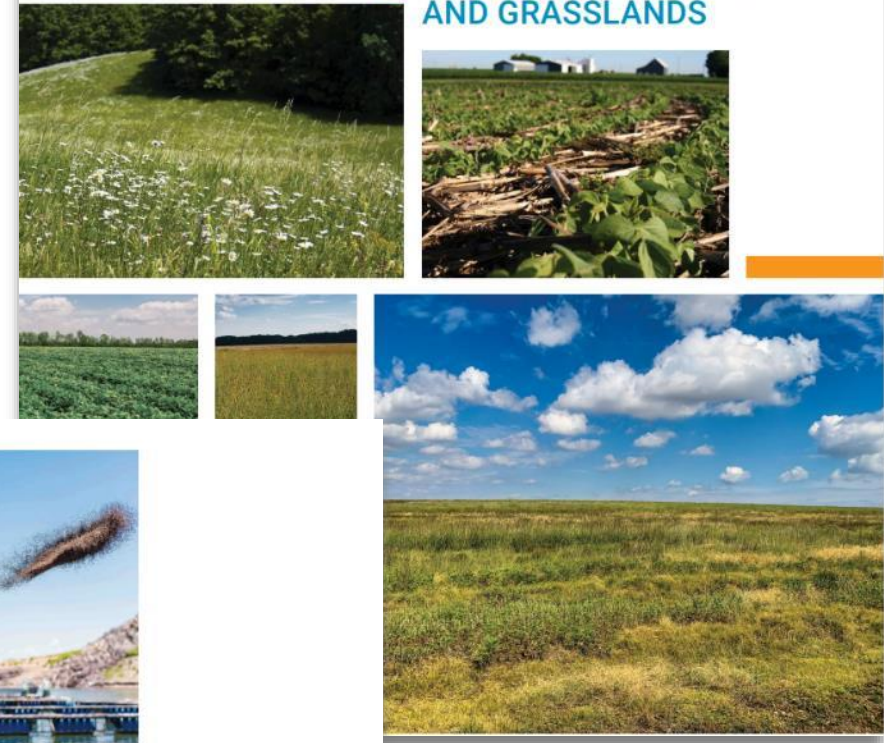
“By 2030, ensure **sustainable food production systems** and implement **resilient agricultural practices** that increase **productivity** and production, that help **maintain ecosystems**, that strengthen capacity for adaptation to climate change, extreme weather, drought, flooding and other disasters and that progressively **improve land and soil quality.**”



# Analysis



## U.S. CROP PRODUCTION PRESERVES FORESTLAND AND GRASSLANDS

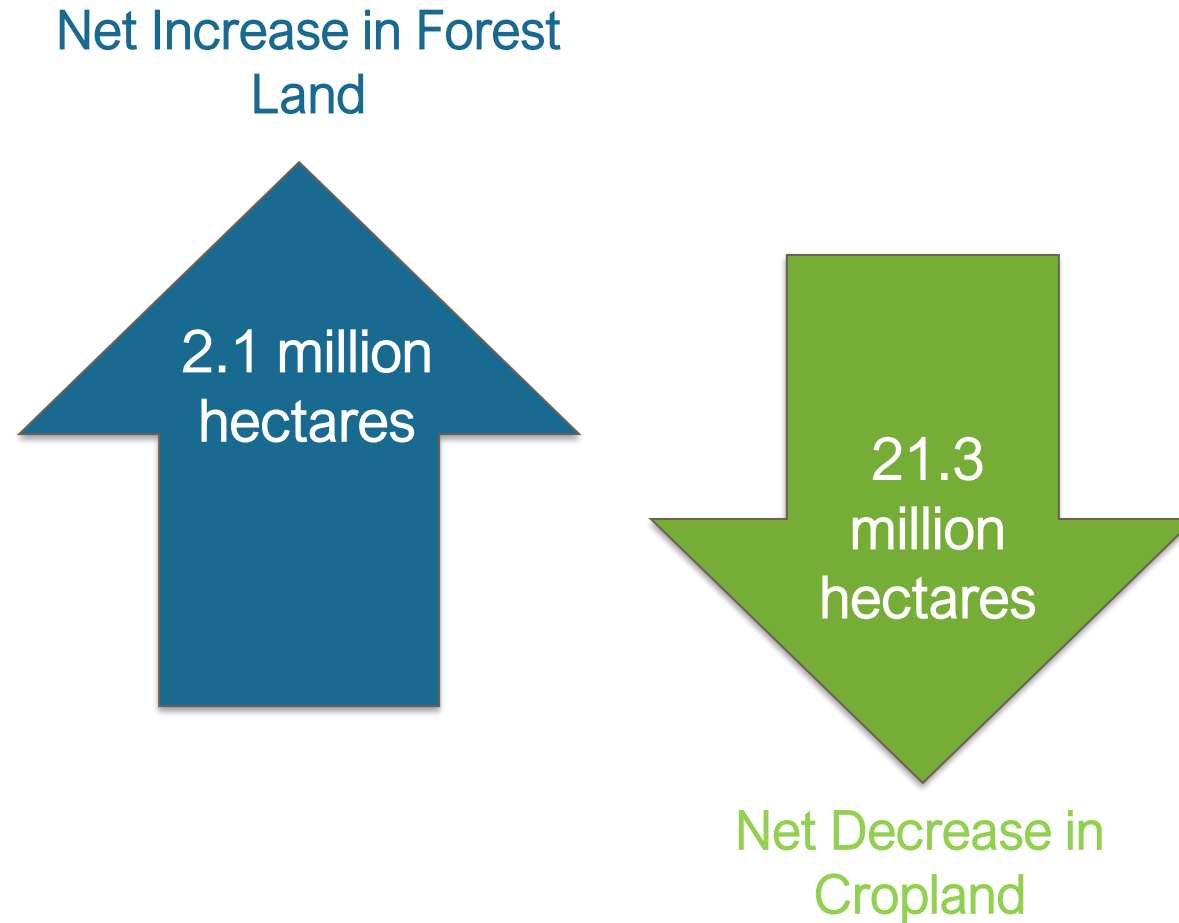


LAND USE CHANGE





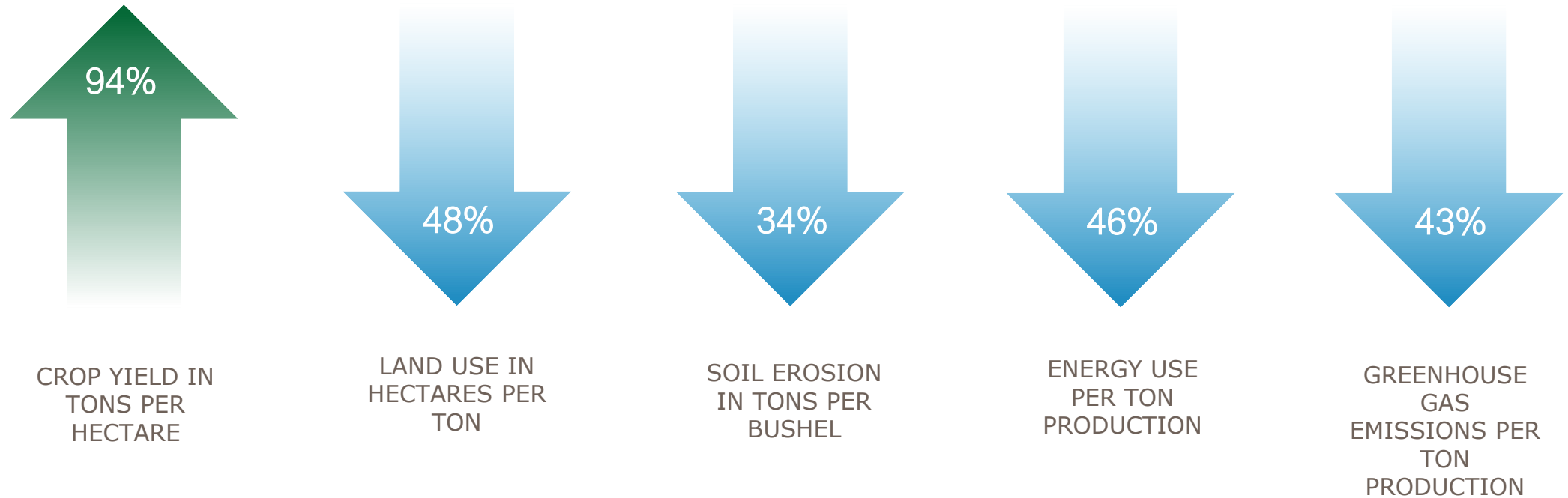
# U.S. Forest Land Increased, Cropland Decreased 1980-2017.



SOURCE: National Resources Inventory Summary Report



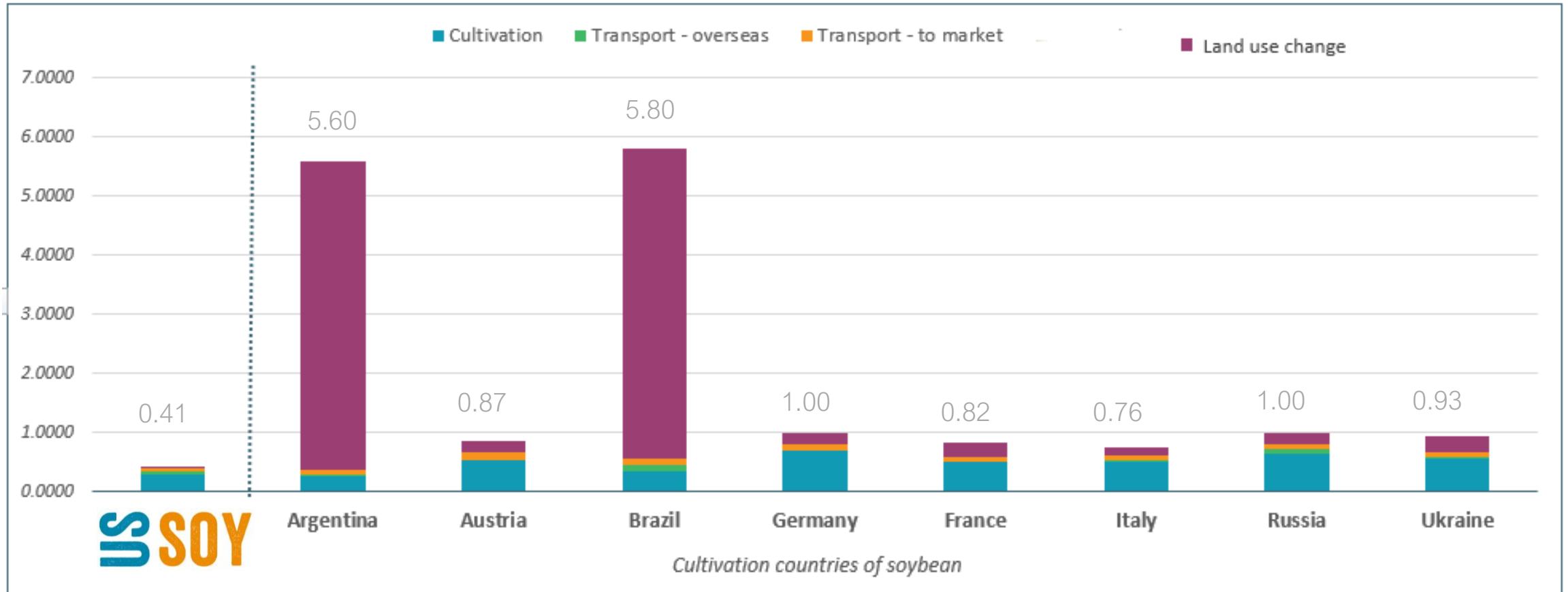
# Environmental Impact of U.S. Soybean Production (1980-2020)



Field to Market: The Alliance for Sustainable Agriculture, 2021. Environmental Outcomes from On-Farm Agricultural Production in the United States (Fourth Edition). ISBN: 978-0-578-33372-4

# Carbon footprint of U.S. Soy

Carbon footprint (including LUC) of soybean for Japan market (kg CO<sub>2</sub>-eq/kg soybean)



Source: Blonk Consultants, Agri-footprint

\*Results based on default emission modelling, including land use change emissions, according to the rules of the PEF-CR-Feed guidance document (European Commission, 2018) as implemented in the Agri-Footprint5.0 database. Specific supply chains may have different results.





# U.S. SSAP

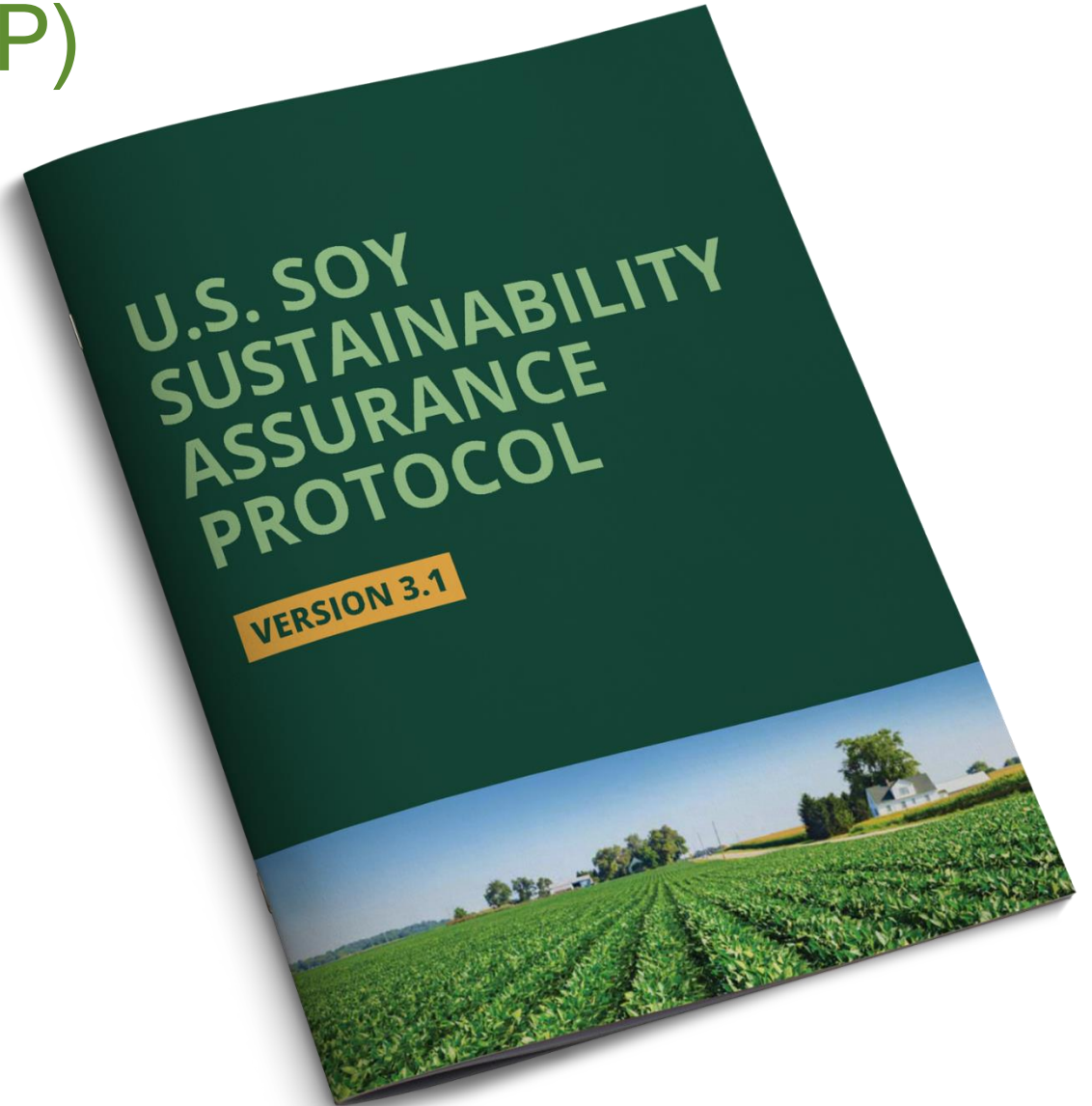
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U.S. Soy Sustainability Assurance Protocol



# U.S. Soy Sustainability Assurance Protocol (SSAP)

- Scheme designed to meet sourcing guidelines in international market
  - Four Directives
- Aggregate/mass balance
- Third party audit
- Certification
- Continuous Improvement Goals



# U.S. Soybean Sustainability Assurance Protocol

## FOUR DIRECTIVES WITH CONTROL MEASURES & REGULATIONS

### 1. Biodiversity and High Carbon Stock

Wetland, grassland, forest, biodiversity

### 2. Production Practices

Conservation tillage, crop rotation, precision farming

### 3. Public and Labor Health, and Welfare

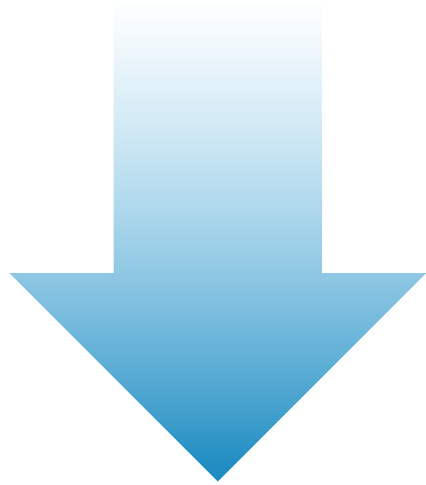
EPA, EEO, OSHA

### 4. Continuous Improvement

CRP, Conservation programs, training and info sharing



# By 2025, U.S. Soybean Farmers Aim to:

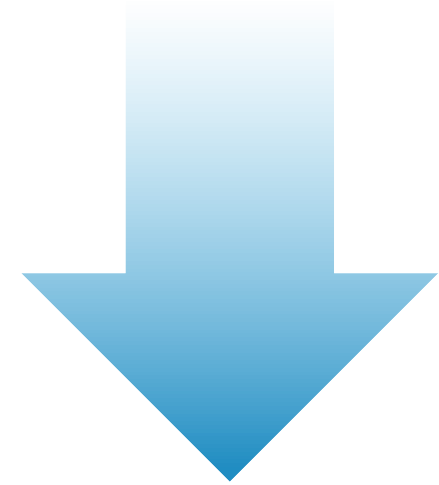
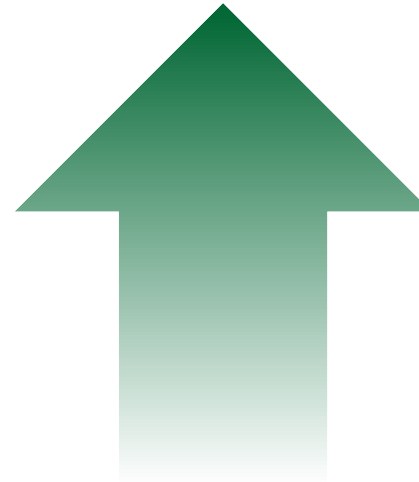


**REDUCE LAND  
USE IMPACT BY  
10 PERCENT**



**REDUCE SOIL  
EROSION 25 PERCENT**

**INCREASE ENERGY  
USE EFFICIENCY  
BY 10 PERCENT**



**REDUCE TOTAL  
GREENHOUSE  
GAS EMISSIONS BY 10  
PERCENT**

*These continuous improvement goals were adopted by key U.S. Soy organizations in 2014 and are based on Field to Market 2000 benchmark.*





# Leveraging the SSAP

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Recognized throughout the Industry

**SSOY**



# U.S. Soy Sustainability Assurance Protocol (SSAP) Globally recognized and 4x Transferable Certificates

- ISO verified process by SGS, the world's leading inspection, verification, testing & certification company
- Positively benchmarked by:



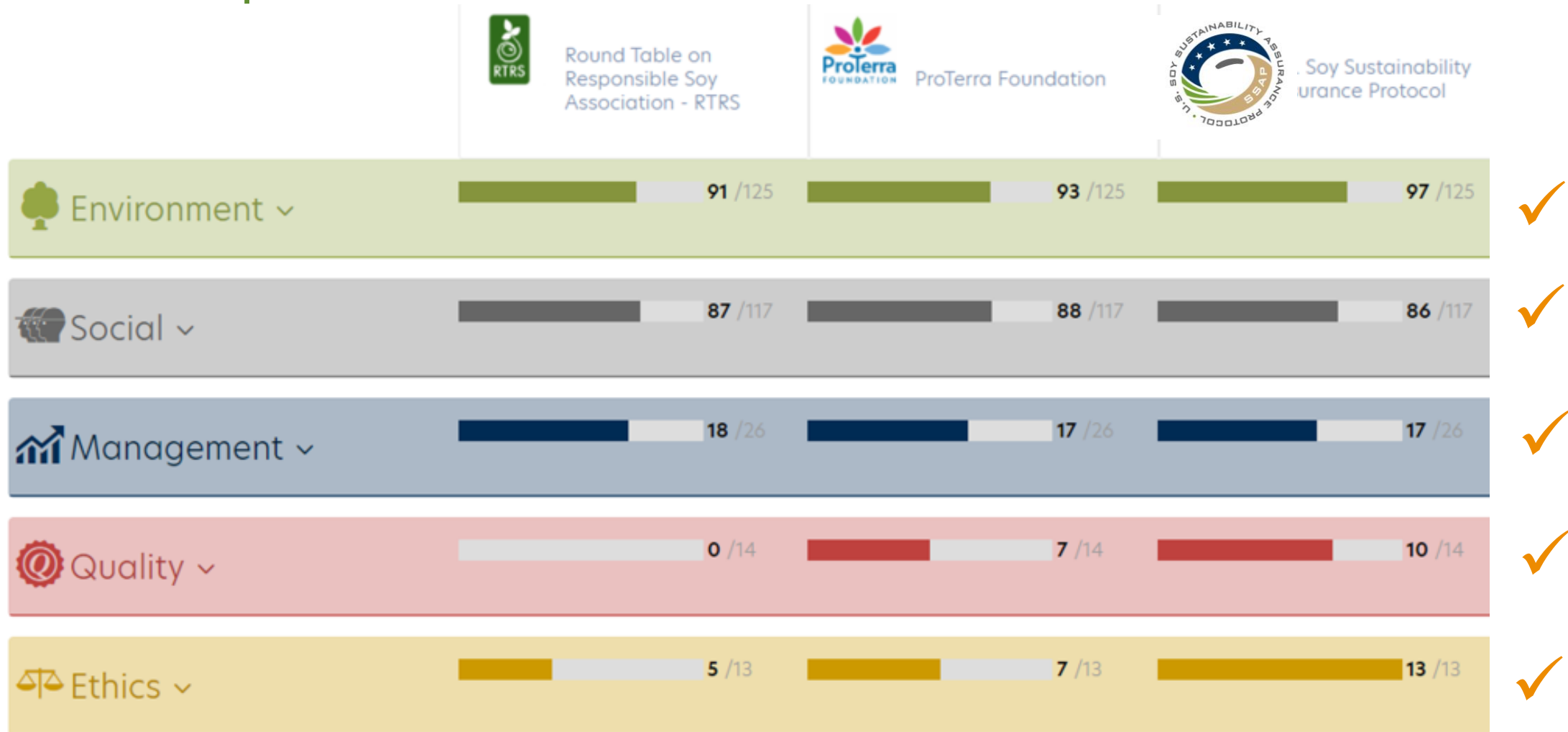
UK Roundtable on  
Sustainable Soya

EU-Renewable  
Energy Directive



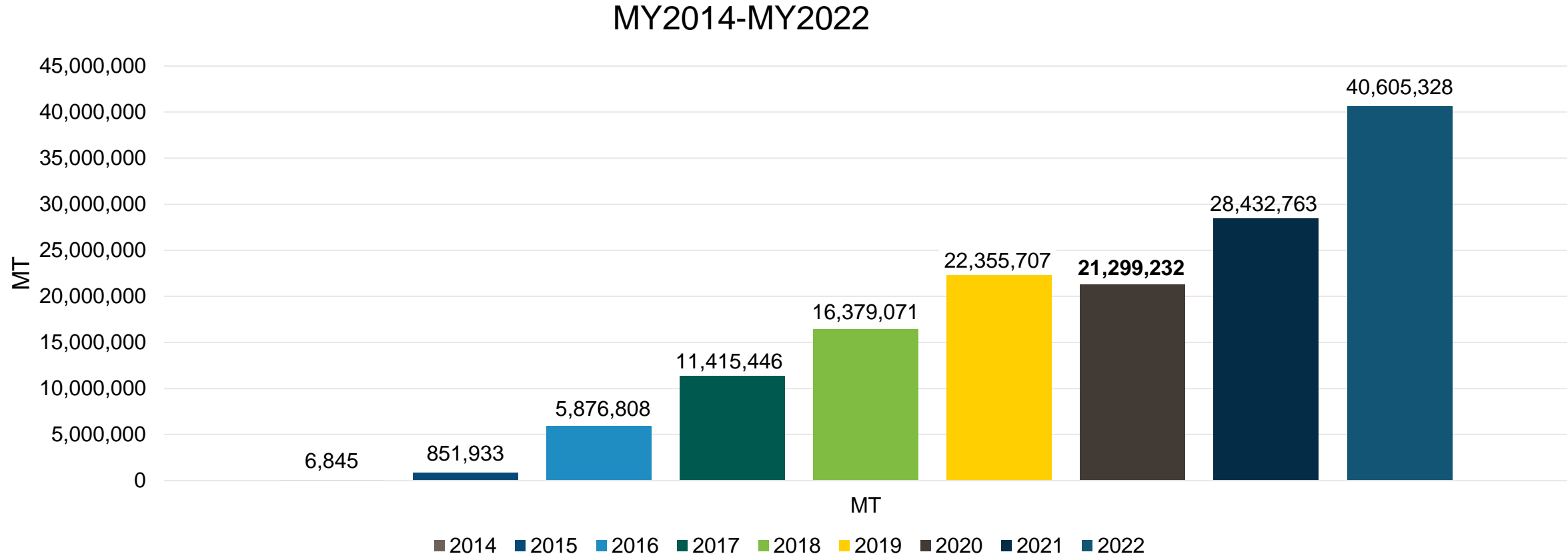


# Comparison of Schemes

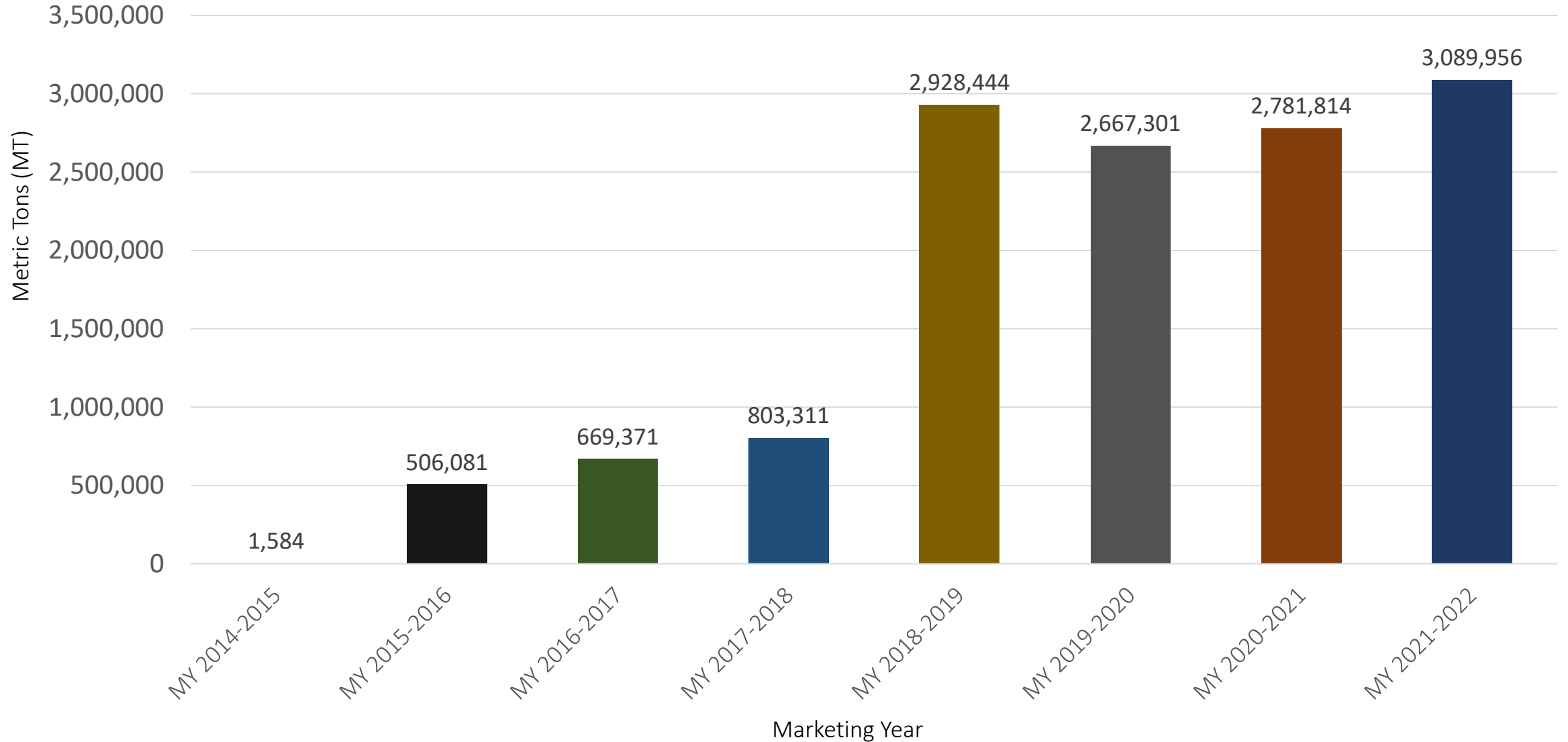


Source: International Trade Centre, EU Feed Industry Sustainable Soy Sourcing Guidelines, Dec 2021

# Verified Sustainable U.S. Shipments for Marketing years 2014-2022



# Verified Sustainable U.S. Shipments for MY15-MY22 Northeast Asia



# Historical SSAP Verified Shipments

Region	2021 TOTAL	2022 TOTAL	2022 (6/1/2022)	2023 (6/1/2023)
Americas	6,654,861	8,197,291	6,168,861	6,467,748
South Asia	370,180	560,094	374,980	216,980
Europe	4,238,163	4,227,027	4,044,779	5,136,387
MENA	287,563	633,948	564,583	501,753
Northeast Asia	2,783,166	3,089,956	2,442,456	2,541,072
Greater China	10,473,744	20,068,465	18,941,431	21,061,356
Southeast Asia	3,625,086	3,828,547	3,320,300	3,528,067
Sub Saharan Africa				193
TOTAL	28,432,763	40,605,328	35,857,390	39,453,556

# Sustainable U.S. Soy Label

- The Sustainable U.S. Soy label is currently being used on 1,000+ stock keeping units (SKUs) or packaging across the globe from 70+ companies
- In NEA, the Sustainable U.S. Soy label is being used on nearly 400 products and growing. Most of those products are in Japan. Though South Korea is growing.





# Examples SUSS Logo in Japan

Product : **TOFU**  
Company : Miyoshi Food



Promoted as safe and secure soy grown under contract.  
Print SSAP mark since 2018

外国産大豆

解説: 豆類食品工業ではアメリカのオハイオ州周辺で10年以上契約栽培を行っています。オハイオ州はアメリカの北部に所在し、冬では氷雪下りも稀にも気温が下がります。そのため、害虫が患いにくく、大豆収穫時に農薬が少なくなるため、安心出来る大豆が栽培できるとされています。また半凍り豆で、第一品質検査を行うことで安定した供給が可能となっています。海外の大豆採りも国内では非常に珍しい。毎年大豆の品質チェックを現地で行っています。その他、栽培地や気候環境に詳しい、新しい地域での栽培地も毎年研究し、より良い品種を探しています。



Promoting the company's commitment to U.S. soybeans on its official website

Product : **TOFU**  
Company : Itami Food



SSAP adopted by a long-established tofu store found in 1958 in Hokkaido



受賞歴

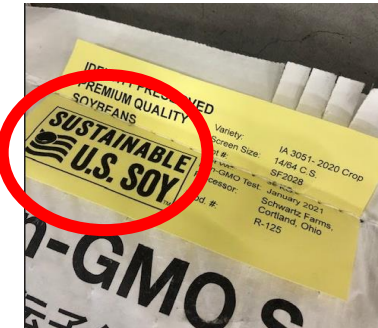
アメリカ大豆サステナビリティ アンバサダーアワード2018 受賞



当店自産の本願豆腐「HANAMIZUKI もめん」が、「アメリカ大豆サステナビリティアンバサダーアワード2018」を受賞しました。この豆腐は、北海道産の大豆「とよみづき」に高い特性を持つ、アメリカ・バージニア州産の「MHL1028」という品種を使用しており、「とよみづき」とバージニア州の花「ハナミズキ」にちなんで名づけられました。この受賞を機に、札幌市はサステナブル（＝持続可能）な方法で生産されているMHL1028を学校給食で使用することを決定しました。

U.S. Soy Ambassador Award 2018 on official website

Product : **Soy Oil & SOYBEAN**  
Company : Saitama Ryokoku



サステナブルな生産方法に基づいた安心・安全な輸入大豆を提供します

当社の輸入大豆の多くは、当社と十年来の取引があるアメリカ合衆国・オハイオ州のSchwartz Farmsで生産されたNon-GMO大豆と、商社と連携し現地のサプライヤーから提供頂いた加工適正に優れた大豆となります。豆腐加工適正に優れた高蛋白質大豆、味噌、豆乳にすぐれた高蛋白質大豆などを取り揃えております。



Importer explains the added value of SSAP on its official website

# Examples SUSS Logo in Japan



Product : **TOFU READY-TO EAT SERIESE**  
Company : SAGAMIYA





Product : **TOFFU PROTEIN SERIESE**  
Company : ASAHICO



NEW



NEW



NEW



NEW



# Examples SUSS Logo in Japan

Product : **TOFU BAR**  
Company : ASAHICO



Product : **TOFU BAR**  
Company : Seven & i







What does the future hold

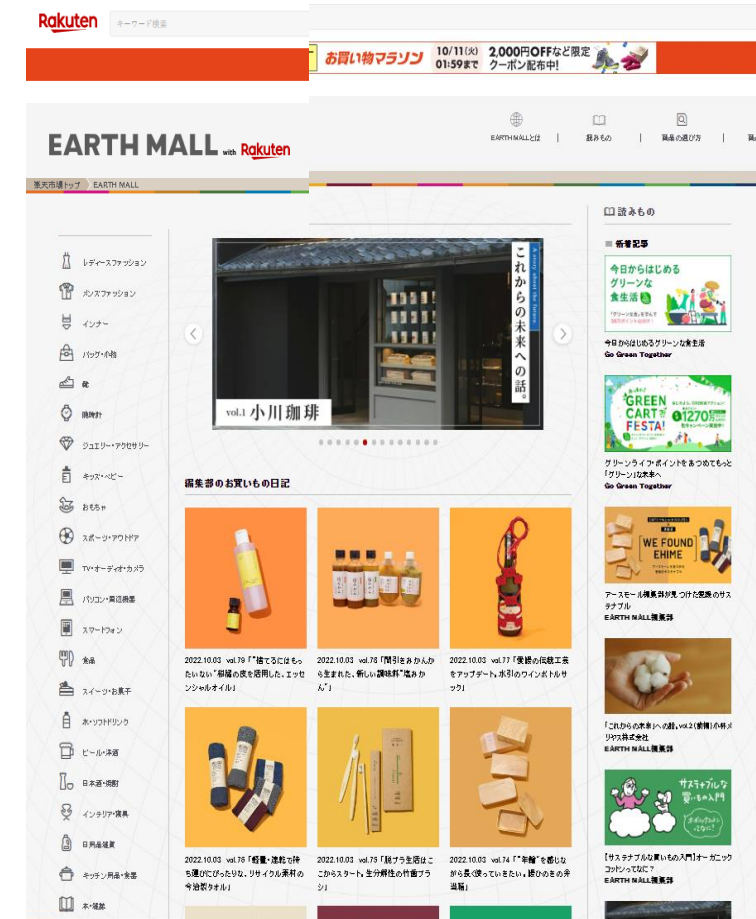
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SSOY



# What will the future bring?

- Consumers want **TRANSPARENCY** that their food is produced **SUSTAINABLY**
- Two-thirds of consumers are more attracted to brands focused on **making the world a better place**
  - E.g. [Earth Mall with Rakuten](#): 130,000+ sustainable labeled products. 2021 sales up 290%+, Site traffic up 5x
- Carbon version of calories
  - E.g. Marubeni and Sustainable Management Promotion Orgn. experiment with changing consumer behavior by displaying carbon footprint of food menu items
- The world is changing – U.S. Soy and USSEC are here to deliver solutions!





# SOY.ORG

## USSEC.ORG | USSOY.ORG