

Terms of Reference: Soy Monitoring Report Europe 2018

August 1, 2019

1. Background

IDH's Soy program aims to make responsible production of soy mainstream and thereby reduce tropical deforestation. We do this by working on governance, in the field, in Mato Grosso, Brazil, but also on the market side, to increase uptake of responsibly produced soy. The monitoring report is an essential part of improving governance, as there is limited data available on the total production and import of responsible soy (defined as FEFAC Soy Sourcing Guideline Compliant).

The report facilitates the market uptake of responsible soy in Europe and increase awareness on the options to do so. IDH and IUCN NL published the first [Soy Monitoring report](#) in April 2019 over the 2017 data. The report shows that only 22% (7.6 million tons) of the total soy use in Europe was compliant with the FEFAC Soy Sourcing Guidelines, and only 12% of European soy imports (4.2 million tons) was deforestation-free. Moreover, currently the production of responsible soy is higher than demand in Europe – an unsustainable situation in itself. In light of all the 2020 zero-deforestation commitments, urgent action by end-buyers is required.

2. The objective of the assignment

The IDH soy monitoring report is an annual report, with the objective of improving the data every year. This assignment will thus continue the work of monitoring responsible soy market uptake in Europe, however it is foreseen to be shorter, as a large part of the context was described in the first report. While giving an overview for all countries, this report is foreseen to especially dive into the top 10 European countries in terms of size of their imports, thereby also including Eastern Europe; as well as the respective sectors. The report will identify gaps, barriers and opportunities for actions to take by different stakeholders along the supply chain in each country. This will include insights into the market availability of responsible and deforestation-free soy and the potential of EU demand.

Opportunity for action and giving examples of what has been done will be a particular focus in this report; highlighting what is being done at the different national roundtables for example.

The consultancy is expected to use and improve the methodology applied in the previous report, especially doing further analysis on how much each sector (e.g. dairy) uses per country. Aside from data collection and calculations (embedded soy), the consultancy is expected to carry out report writing, positive and normative data analysis and design, all in close collaboration with IDH. Stakeholders are to be consulted on the country chapters and on a pre-final draft. IDH has an in-house text editor who will support the editing and writing.

Data collection in the soy sector is difficult. Data on the use in feed will be collected with the support of the national feed alliances and FEFAC, to be cross-referenced by European level data from FEDIOL and COCERAL. Production side data requires contact with scheme owners. The consultancy will be in frequent contact with IDH partners, therefore a certain level of stakeholder engagement is also required; also to ensure future stakeholder support.

3. Scope of the report

A draft table of contents, to be adjusted with the consultant based on new insights:

1. Infographic
 - Based on key data from report, in similar format as the last version.
2. Executive Summary
3. Preface to be written by IDH
4. Chapter 1: Overview of global trade
 - Main producer and consumer countries, for beans, meal and oil.
 - (tbd, other context, such as US-China trade war)
5. Chapter 2: Production
 - Short introduction to soy
 - Updates on context per producing country (e.g. outcomes of the Cerrado Working Group in Brazil, IDH landscapes work, but also deforestation figures & attribution to soy)
 - Geographic distribution of compliant soy production, broken down per standard and country
 - EU soy production
6. Chapter 3: Consumption.
 - Overview of soy trade in Europe in 2018, including responsible soy market uptake.
 - Overview of soy use per sector – poultry, eggs, dairy, pork, beef.
 - Updates on European context, initiatives and actions, e.g. EU communication on Stepping Up EU Action against Deforestation and Forest Degradation; Soft Commodities Forum Report, Collaborative Soy Initiative etc.
7. Chapter 4: Deep dive in top 10 users of soy
 - Market overview (per sector, imports, (re)exports, total use, etc.)
 - Share of compliant soy (Including FEFAC and other standards and schemes)
 - Initiatives in the countries (including country specific context (non-gm preferences, national protein strategies and NGO attention). Non-repetitive compared to the last report; focusing on examples & opportunities for action.
8. Conclusions and policy/action recommendations

4. Method of work

The consultant is responsible for all data collection.

- Hard data will be gathered from the feed and trade sectors. IDH will provide initial contacts of the feed national associations and a questionnaire will be sent out to them in coordination with FEFAC. Aggregated data from the trade will be received via FEDIOL and COCERAL.
- Trade figures can be extracted from the major global trade databases (e.g. EuroStat. ITC Trade Map, USDA, FAOStat, etc.) and where necessary include expert opinions
- Contextual information, for example on the national roundtables/ initiatives – also here, IDH will provide contacts, however the consultant is also expected to use their own network and connections.

Regular calls will be held between IDH and the consultant to provide feedback. As the consultant will be in contact with many of IDH's stakeholders, we stress the importance of asking for information in a timely way, providing enough information on the process etc.

5. Deliverables and timeline

Below is the timeline for this assignment with deliverables:

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| Kick-off meeting | September 2 |
| Questionnaire, detailed timeline and interview list | September 9 |
| Questionnaire out | September 30 |
| Final draft chapters 1 & 2 | November 3 |
| Stakeholder consultation | November 25 |
| Final draft (to editor and designer) | December 16 |
| Final version for publication | January 6, 2020 |

The deliverables include a final report that is expected to be around 30 pages and will be published, raw data used in the report and raw files of the graphs and design for IDH's communication use.

6. Consultant profile

For this assignment, IDH is looking for an independent and credible consultant (individual or team) with the following profile:

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|-------------|---|
| Experiences | <ul style="list-style-type: none"> – Relevant network in Europe, both in public and private sectors – Experience working with actors in soy – Experience with commodity data collection and analysis; preferably also on soy – Experience with engaging with different types of stakeholders in both public and private sectors |
| People | <ul style="list-style-type: none"> – In-depth knowledge in global deforestation-free movement, both in European and in producer countries' contexts. – In-depth knowledge in forest-risk commodity supply chains, preferably with soy – Good English verbal and written skills – Strong analytical skills – A track record of similar work and previous working experience |

7. Submission of proposals

Please send a proposal (maximum 5 pages, excluding Annexes), including a proposed approach, timeline and budget, before August 18, 2019 to Chih-Ching Lan, at lan@idhtrade.org. Any inquiries can also be directed to this email address.