
Consumer country profiles

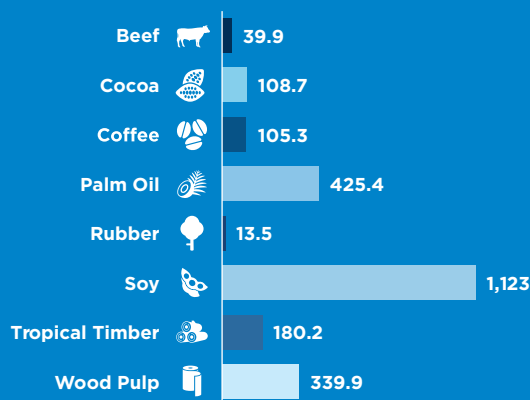


Belgium

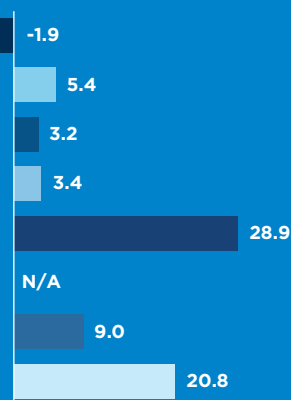


DEMAND & IMPORTS TRENDS

AVERAGE ANNUAL NET IMPORTS, 2011-16, '000 TONNES



AVERAGE NET IMPORT YOY GROWTH, 2011-16, (%)



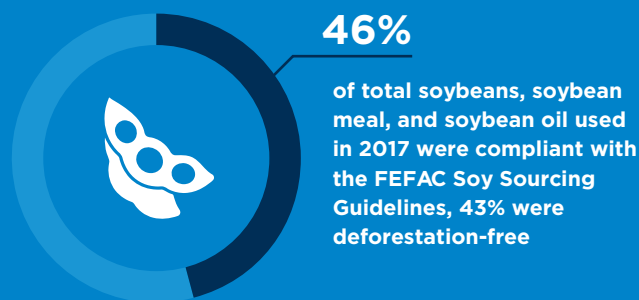
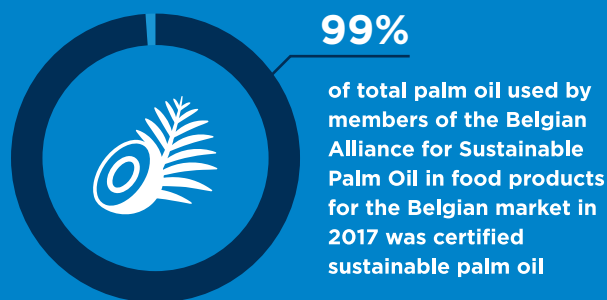
SHARE OF REGIONAL NET IMPORTS, 2011-16, (%)



TOP SOURCES OF SUPPLY 2018

Beef	France	Netherlands	UK
Cocoa	Côte d'Ivoire	Nigeria	Ghana
Coffee	Brazil	Viet Nam	Honduras
Palm Oil	Netherlands	Indonesia	Malaysia
Rubber	Indonesia	Côte d'Ivoire	Thailand
Soy	Brazil	Canada	Netherlands
Tropical Timber	Cameroon	Gabon	Brazil
Wood Pulp	USA	Brazil	Netherlands

SUSTAINABILITY SOURCING PERFORMANCE



(A) Import data is sourced from Food and Agriculture Organisation (FAO), International Tropical Timber Organisation (ITTO), and IDH. Net imports refer to total imports adjusted for re-exports. For tropical timber, the unit of measurement for net imports is 1000m3. For soy, net imports are based on 2017 data. Regional import data was aggregated from data of 28 European Union (EU) countries and 4 European Free Trade Association (EFTA) countries where data is available. Intra-regional trade is included in the regional figures. Data on top sources of supply is sourced from International Trade Centre (ITC). Data for wood pulp is based on import value, data for other commodities is based on import quantity. Re-exporters are included. (B) Data on sustainable sourcing performance is sourced from IDH.

GOVERNMENT & PRIVATE SECTOR INITIATIVES

EXAMPLES OF GOVERNMENT & PRIVATE SECTOR INITIATIVES



- “Beyond Chocolate” partnership to combat deforestation and ensure a liveable income for cocoa producers



- Belgian Alliance for Sustainable Palm Oil (BASP) supports members to ensure that by 2020 all food products containing palm oil, and intended for the Belgian market, contain only sustainable palm oil.
- Solvay has committed to source 100% of its palm oil sustainably



- Since 2016, Colruyt Group has 100% of its soy compensated by the Round Table on Responsible Soy (RTRS)



- Public procurement policy requiring sustainable sourcing of timber
- Agreement between the government and the timber industry to increase the market share of responsibly sourced timber in Belgium
- Participation in the multi-stakeholder platform Congo Basin Forest Partnership
- Vandemoortele has committed 100% of its packaging to be recycled or FSC/PEFC certified by 2020

COMPANIES, WWF ASSESSMENT, 2016



Palm Oil



Soy

Colruyt Group	9/9	13/24
Lotus	9/9	N/A
Aigremont	8/9	N/A
Vandemoortele	8/9	4/24
Belgian Pork Group	N/A	0/24

No Belgian companies were assessed by Forest 500 in 2018

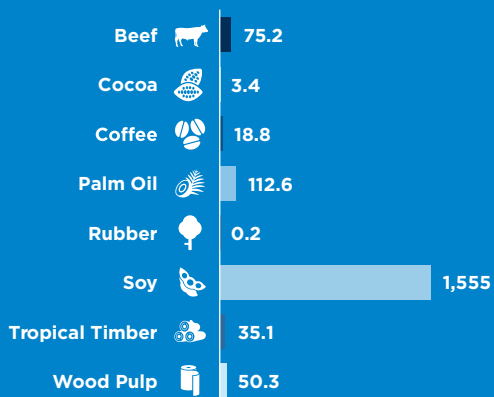


Denmark

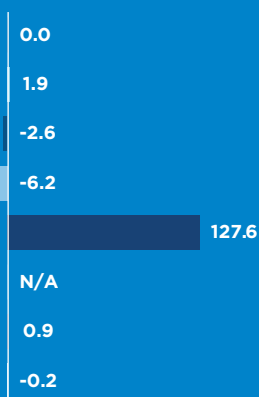


DEMAND & IMPORTS TRENDS

AVERAGE ANNUAL NET IMPORTS, 2011-16, '000 TONNES



AVERAGE NET IMPORT YOY GROWTH, 2011-16, (%)



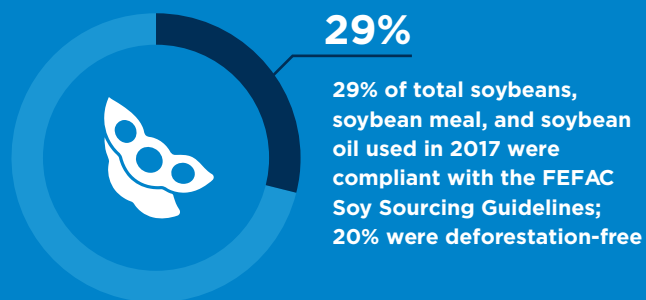
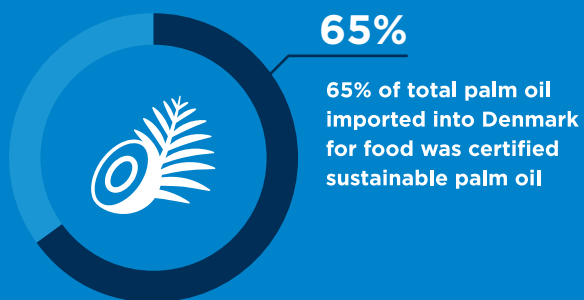
SHARE OF REGIONAL NET IMPORTS, 2011-16, (%)



TOP SOURCES OF SUPPLY 2018

Commodity	Source 1	Source 2	Source 3
Beef	Netherlands	Germany	Poland
Cocoa	UK	Nicaragua	Peru
Coffee	Sweden	Germany	Brazil
Palm Oil	Indonesia	Germany	Malaysia
Rubber	Germany	Sweden	Netherlands
Soy	China	Germany	Italy
Tropical Timber	Brazil	Germany	Peru
Wood Pulp	USA	Finland	Germany

SUSTAINABILITY SOURCING PERFORMANCE



(A) Import data is sourced from Food and Agriculture Organisation (FAO), International Tropical Timber Organisation (ITTO), and IDH. Net imports refer to total imports adjusted for re-exports. For tropical timber, the unit of measurement for net imports is 1000m3. For soy, net imports are based on 2017 data. Regional import data was aggregated from data of 28 European Union (EU) countries and 4 European Free Trade Association (EFTA) countries where data is available. Intra-regional trade is included in the regional figures. Data on top sources of supply is sourced from International Trade Centre (ITC). Data for wood pulp is based on import value, data for other commodities is based on import quantity. Re-exporters are included. (B) Data on sustainable sourcing performance is sourced from IDH.

GOVERNMENT & PRIVATE SECTOR INITIATIVES

EXAMPLES OF GOVERNMENT & PRIVATE SECTOR INITIATIVES



- DANIDA sponsored research to improve cocoa fermenting techniques in Ghana



- Partnership for Green Public Procurement / Forum on Sustainable Procurement
- Danish government supported a training programme for Indonesian palm oil firms
- Danish Food and Drink Federation Initiative for Sustainable Palm Oil



- Danish International Development Agency (DANIDA) supported the “Responsible Sourcing of Soy, Cattle and Palm Oil Project”
- The Danish Ethical Trade Initiative launched a working group on soy



- Public procurement policy requiring legal and sustainable sourcing of timber

COMPANIES, FOREST 500 ASSESSMENT, 2018



Palm Oil



Soy



Tropical Timber

Total Score

	Palm Oil	Soy	Tropical Timber	Total Score
Arla Foods	✓	✓	✓	3/5
Biomar	✓	✓	✗	2/5
DLG Denmark	✓	✓	✗	2/5
Bestseller A/S			✗	1/5
Danish Agro	✗	✗	✓	1/5
Hamlet Protein		✓	✗	1/5

(C) Data on government & private sector initiatives is sourced from Forest 500, IDH and literature review for cocoa, palm oil, soy, and timber & paper. For data sourced from Forest 500, timber and paper were combined. Forest 500 selected companies based on: (1) risk of being linked to deforestation; and (2) influence within the political economy of deforestation. Ticks indicate commodity specific policies. Companies are assessed based on: (1) Intent & Awareness; (2) Commodity Commitments; (3) Scope & Ambition; (4) Reporting, Monitoring & Implementation; and (5) Social Commitments. Companies are scored out of 100 points, and these points are converted to between zero and five points.

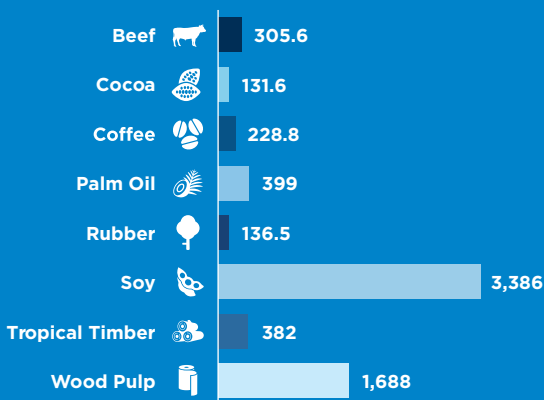


France

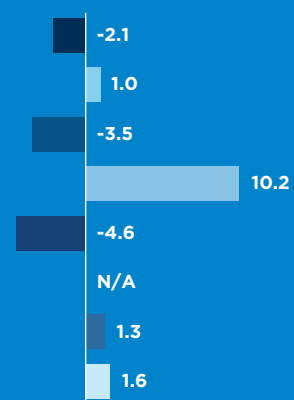


DEMAND & IMPORTS TRENDS

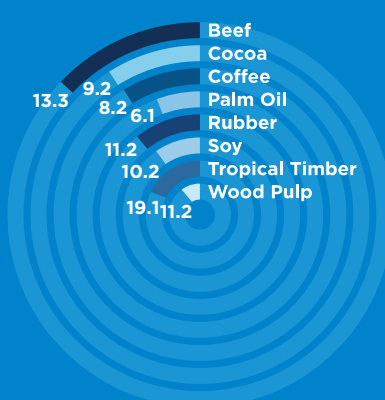
AVERAGE ANNUAL NET IMPORTS, 2011-16, '000 TONNES



AVERAGE NET IMPORT YOY GROWTH, 2011-16, (%)



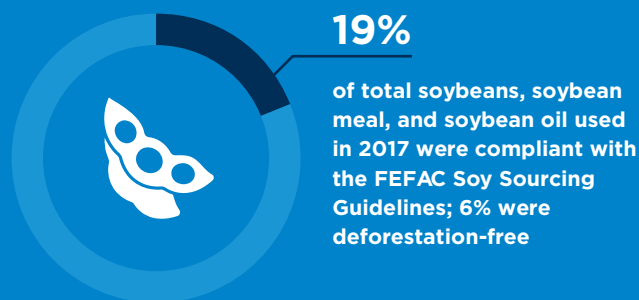
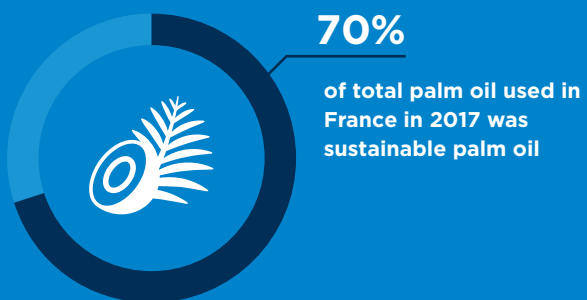
SHARE OF REGIONAL NET IMPORTS, 2011-16, (%)



TOP SOURCES OF SUPPLY 2018

	Beef	Netherlands	Belgium	Germany
	Cocoa	Côte d'Ivoire	Ghana	Belgium
	Coffee	Brazil	Switzerland	Viet Nam
	Palm Oil	Netherlands	Indonesia	Malaysia
	Rubber	Indonesia	Thailand	Côte d'Ivoire
	Soy	Brazil	USA	Canada
	Tropical Timber	Cameroon	Brazil	Belgium
	Wood Pulp	Brazil	Sweden	Finland

SUSTAINABILITY SOURCING PERFORMANCE



(A) Import data is sourced from Food and Agriculture Organisation (FAO), International Tropical Timber Organisation (ITTO), and IDH. Net imports refer to total imports adjusted for re-exports. For tropical timber, the unit of measurement for net imports is 1000m3. For soy, net imports are based on 2017 data. Regional import data was aggregated from data of 28 European Union (EU) countries and 4 European Free Trade Association (EFTA) countries where data is available. Intra-regional trade is included in the regional figures. Data on top sources of supply is sourced from International Trade Centre (ITC). Data for wood pulp is based on import value, data for other commodities is based on import quantity. Re-exporters are included. (B) Data on sustainable sourcing performance is sourced from IDH.

GOVERNMENT & PRIVATE SECTOR INITIATIVES

EXAMPLES OF GOVERNMENT & PRIVATE SECTOR INITIATIVES



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- The Danish Ethical Trade Initiative launched a working group on soy



- Public procurement policy requiring legal and sustainable sourcing of timber

COMPANIES, FOREST 500 ASSESSMENT, 2018



	Palm Oil	Soy	Tropical Timber	Total Score
L’Oreal	✓		✓	4/5
Carrefour	✓	✓	✓	3/5
Danone	✓	✓	✓	3/5
AFM	✓	✗	✓	2/5
Casino Guichard Perrachon	✓	✓	✓	2/5
Groupe Avril	✓	✓	✗	2/5
Kering			✓	2/5
LVMH	✓		✓	2/5
Rougier Group			✓	2/5
Saint Gobain			✓	2/5
Fleury Michon, Groupe		✗	✗	1/5
Groupe Savencia	✗	✗	✗	1/5
Invivo		✗	✗	1/5
Groupe Lactalis	✗	✗	✗	0/5
Le Goouessant		✗	✗	0/5

(C) Data on government & private sector initiatives is sourced from Forest 500, IDH and literature review for cocoa, palm oil, soy, and timber & paper. For data sourced from Forest 500, timber and paper were combined. Forest 500 selected companies based on: (1) risk of being linked to deforestation; and (2) influence within the political economy of deforestation. Ticks indicate commodity specific policies. Companies are assessed based on: (1) Intent & Awareness; (2) Commodity Commitments; (3) Scope & Ambition; (4) Reporting, Monitoring & Implementation; and (5) Social Commitments. Companies are scored out of 100 points, and these points are converted to between zero and five points.

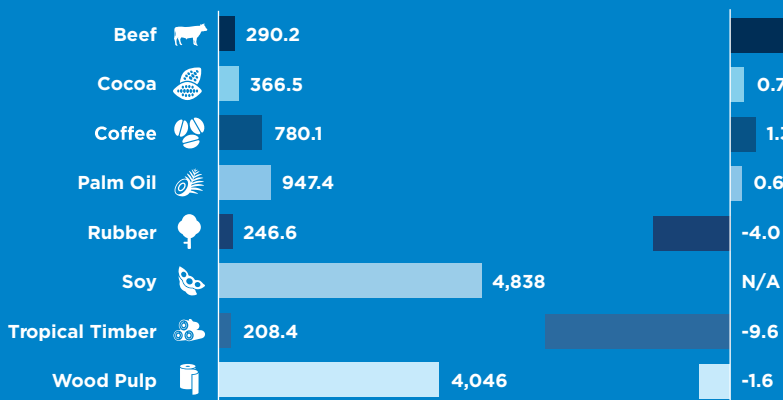


Germany

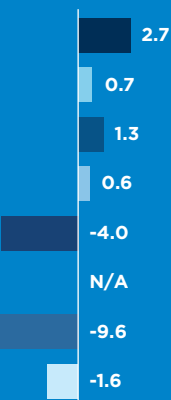


DEMAND & IMPORTS TRENDS

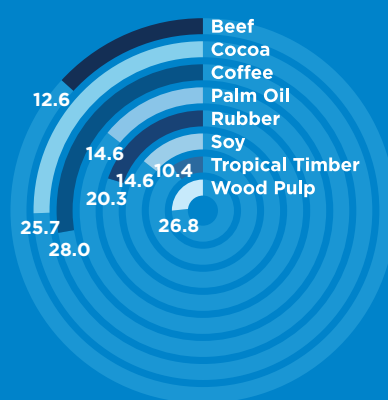
AVERAGE ANNUAL NET IMPORTS, 2011-16, '000 TONNES



AVERAGE NET IMPORT YOY GROWTH, 2011-16, (%)



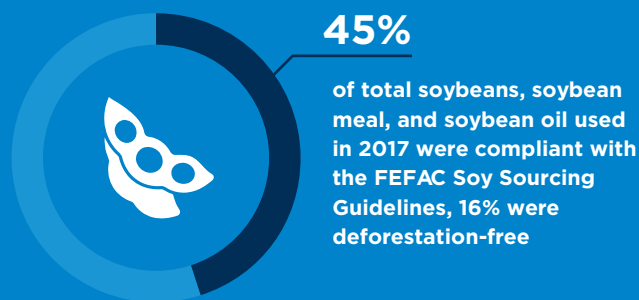
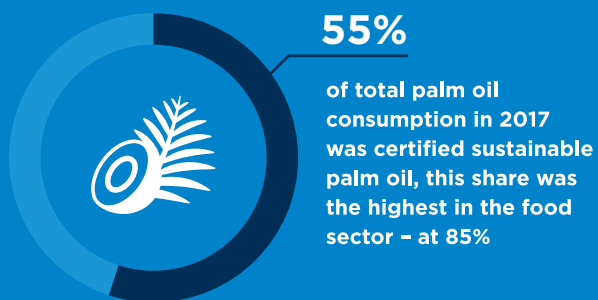
SHARE OF REGIONAL NET IMPORTS, 2011-16, (%)



TOP SOURCES OF SUPPLY 2018

	Beef	Netherlands	France	Poland
	Cocoa	Côte d'Ivoire	Nigeria	Ghana
	Coffee	Brazil	Viet Nam	Honduras
	Palm Oil	Netherlands	Indonesia	Malaysia
	Rubber	Côte d'Ivoire	Indonesia	Malaysia
	Soy	USA	Brazil	Canada
	Tropical Timber	Cameroon	Ghana	Côte d'Ivoire
	Wood Pulp	Brazil	Sweden	Finland

SUSTAINABILITY SOURCING PERFORMANCE



(A) Import data is sourced from Food and Agriculture Organisation (FAO), International Tropical Timber Organisation (ITTO), and IDH. Net imports refer to total imports adjusted for re-exports. For tropical timber, the unit of measurement for net imports is 1000m3. For soy, net imports are based on 2017 data. Regional import data was aggregated from data of 28 European Union (EU) countries and 4 European Free Trade Association (EFTA) countries where data is available. Intra-regional trade is included in the regional figures. Data on top sources of supply is sourced from International Trade Centre (ITC). Data for wood pulp is based on import value, data for other commodities is based on import quantity. Re-exporters are included. (B) Data on sustainable sourcing performance is sourced from IDH.

GOVERNMENT & PRIVATE SECTOR INITIATIVES

EXAMPLES OF GOVERNMENT & PRIVATE SECTOR INITIATIVES



- Multi-stakeholder platform “German Initiative on Sustainable Cocoa” supported by the Federal Ministry of Food and Agriculture (BMEL)



- Forum for Sustainable Palm Oil (FONAP) funded by BMEL
- Pilot implementation of a district-level sustainable oil palm program in Indonesia



- Forum Nachhaltigere Eiweissfuttermittel (Forum on More Sustainable Protein Feeds) supported by BMEL



- Public procurement policy requiring sustainable sourcing of timber
- Thünen Centre of Competence on the Origin of Timber
- Partnership with Norway and Peru to tackle deforestation

COMPANIES, FOREST 500 ASSESSMENT, 2018



Palm Oil



Soy



Tropical Timber

Total Score

	Palm Oil	Soy	Tropical Timber	Total Score
Henkel AG & Co. KGaA	✓		✓	4/5
Bertelsmann SE & Co. KGaA			✓	3/5
Adidas Group			✗	2/5
Aldi Group	✓	✗	✓	2/5
BASF SE	✓		✗	2/5
Maxingvest AG	✓		✓	2/5
Metro AG	✓	✗	✓	2/5
Rewe Group	✓	✓	✓	2/5
Schwarz Group	✓	✓	✓	2/5
Blondeau Group			✓	1/5
Deichmann Group			✗	1/5
Oetker-Gruppe	✓	✗	✗	1/5
PHW Group	✓	✓	✗	1/5

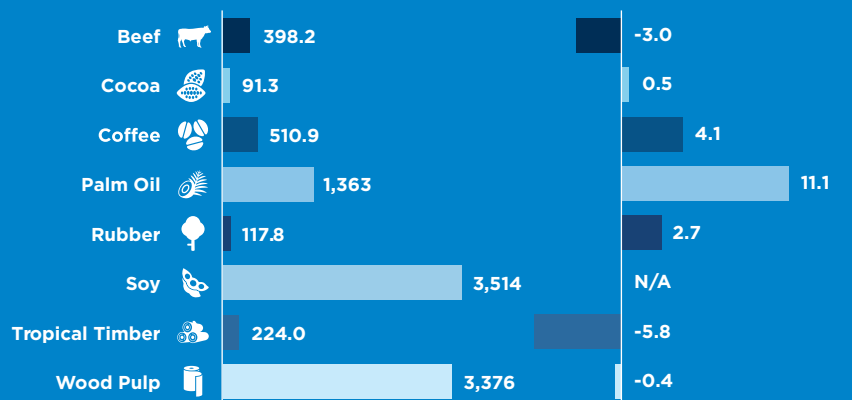
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Italy

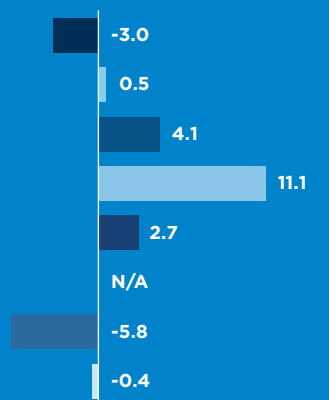


DEMAND & IMPORTS TRENDS

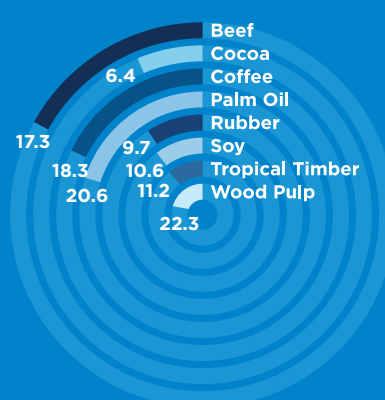
AVERAGE ANNUAL NET IMPORTS, 2011-16, '000 TONNES



AVERAGE NET IMPORT YOY GROWTH, 2011-16, (%)



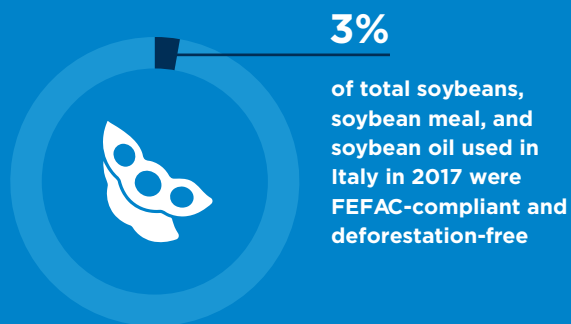
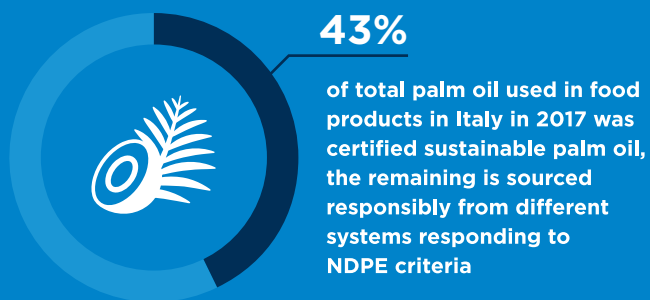
SHARE OF REGIONAL NET IMPORTS, 2011-16, (%)



TOP SOURCES OF SUPPLY 2018

	Beef	France	Poland	Netherlands
	Cocoa	Côte d'Ivoire	Ghana	Peru
	Coffee	Brazil	Viet Nam	India
	Palm Oil	Indonesia	Malaysia	Netherlands
	Rubber	Thailand	Indonesia	Viet Nam
	Soy	USA	Canada	Brazil
	Tropical Timber	Cameroon	Gabon	Côte d'Ivoire
	Wood Pulp	Brazil	USA	Sweden

SUSTAINABILITY SOURCING PERFORMANCE



(A) Import data is sourced from Food and Agriculture Organisation (FAO), International Tropical Timber Organisation (ITTO), and IDH. Net imports refer to total imports adjusted for re-exports. For tropical timber, the unit of measurement for net imports is 1000m3. For soy, net imports are based on 2017 data. Regional import data was aggregated from data of 28 European Union (EU) countries and 4 European Free Trade Association (EFTA) countries where data is available. Intra-regional trade is included in the regional figures. Data on top sources of supply is sourced from International Trade Centre (ITC). Data for wood pulp is based on import value, data for other commodities is based on import quantity. Re-exporters are included. (B) Data on sustainable sourcing performance is sourced from IDH.

GOVERNMENT & PRIVATE SECTOR INITIATIVES

EXAMPLES OF GOVERNMENT & PRIVATE SECTOR INITIATIVES



- Ferrero is a member of the Cocoa & Forests Initiative and is actively working on sustainable cocoa



- The Italian Union for Sustainable Palm Oil brings together companies and trade associations who are committed to 100% certified sustainable palm oil by 2020



- Public procurement policy for paper and furniture
- Members of Assocarta, the trade association of the paper industry, are committed to promoting the use of legal timber through the Codes of Good Practices
- Federlegno-Arredo, the Federation of Wood Furniture, Cork and Furnishing Italian Industries, signed cooperation agreements with Greenpeace and World Wildlife Fund to inform and promote the use of legal timber

COMPANIES, FOREST 500 ASSESSMENT, 2018



Palm Oil



Soy



Tropical Timber

Total Score

	Palm Oil	Soy	Tropical Timber	Total Score
Barilla Holding SPA	✓	✓	✓	3/5
Ferrero Group	✓	✗	✓	3/5
Prada SPA			✓	2/5
Gruppo Veronesi		✓	✗	1/5
Natuzzi			✓	1/5
Gruppo Mastrotto SPA			✗	0/5

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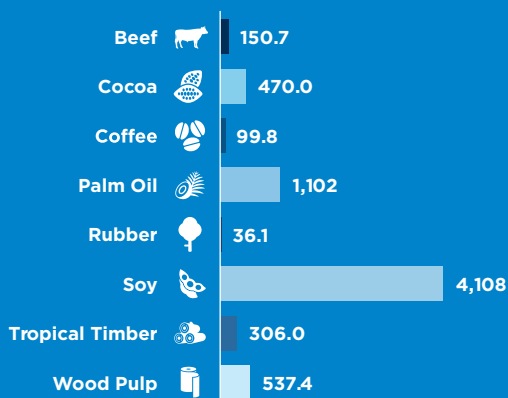


Netherlands

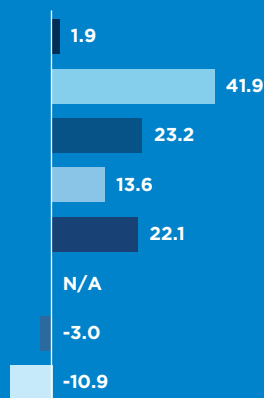


DEMAND & IMPORTS TRENDS

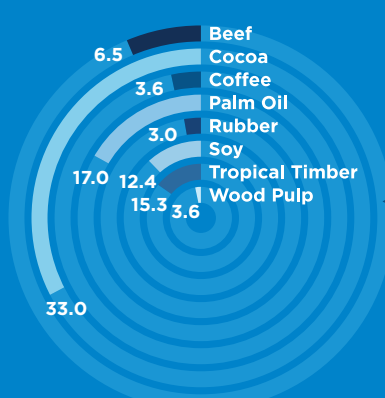
AVERAGE ANNUAL NET IMPORTS, 2011-16, '000 TONNES



AVERAGE NET IMPORT YOY GROWTH, 2011-16, (%)



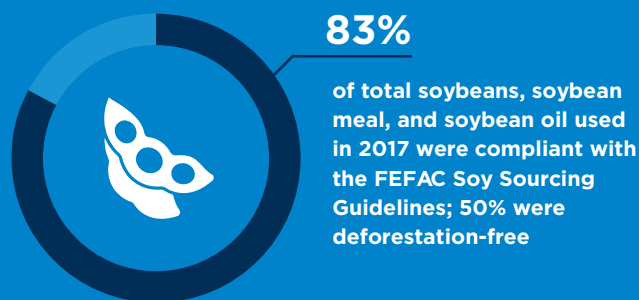
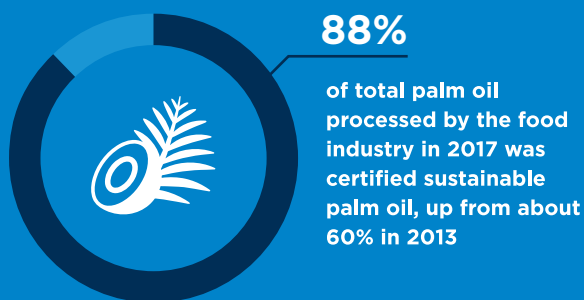
SHARE OF REGIONAL NET IMPORTS, 2011-16, (%)



TOP SOURCES OF SUPPLY 2018

	Beef	Germany	Belgium	Ireland
	Cocoa	Côte d'Ivoire	Ghana	Nigeria
	Coffee	Belgium	Germany	Brazil
	Palm Oil	Malaysia	Indonesia	Papua New Guinea
	Rubber	Côte d'Ivoire	Malaysia	Germany
	Soy	USA	Brazil	Ukraine
	Tropical Timber	Belgium	Brazil	Cameroon
	Wood Pulp	Brazil	Uruguay	Finland

SUSTAINABILITY SOURCING PERFORMANCE



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GOVERNMENT & PRIVATE SECTOR INITIATIVES

EXAMPLES OF GOVERNMENT & PRIVATE SECTOR INITIATIVES



- Cocoa Rehabilitation and Intensification Programme (CORIP) in Ghana
- Chocolate Working Group



- 95% of palm oil used in animal feed must be RSPO certified
- Partnership with Indonesian government
- The Dutch Alliance for Sustainable Palm Oil (DASPO)



- 95% of soy used in animal feed must be RTRS certified
- Global Producers Support Initiative
- The Dutch Soy Platform Initiative to promote certified deforestation-free soy



- Timber Procurement Assessment Committee (TPAC) to assess compliance with the Dutch timber procurement requirements
- The Green Deal initiative to promote certified sustainable timber

COMPANIES, FOREST 500 ASSESSMENT, 2018



Palm Oil



Soy



Tropical Timber

Total Score

	Palm Oil	Soy	Tropical Timber	Total Score
Louis Dreyfus	✓	✓		4/5
IKEA Group	✓		✓	3/5
FrieslandCampina	✓	✓	✓	3/5
Royal Dutch Shell	✓	✓		3/5
Ahold Delhaize	✓	✓	✓	2/5
DSM	✓	✓	✓	2/5
Agrifirm	✓	✓	✗	1/5
De Heus	✓	✓	✗	1/5
ForFarmers	✓	✓	✗	1/5
Plukon Food Group		✓	✗	1/5
SHV Holdings	✓	✓	✗	1/5
Spar International	✗	✓	✗	1/5

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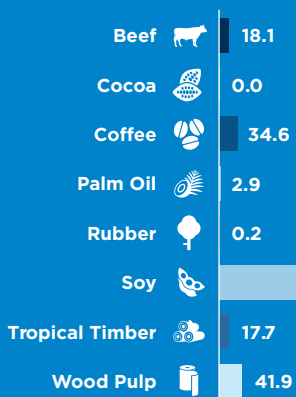


Norway

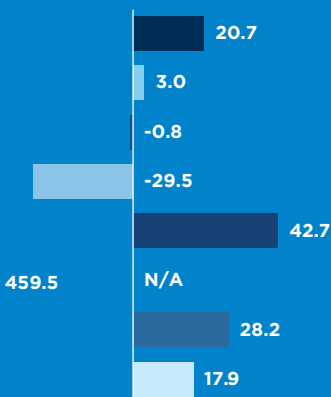


DEMAND & IMPORTS TRENDS

AVERAGE ANNUAL NET IMPORTS, 2011-16, '000 TONNES



AVERAGE NET IMPORT YOY GROWTH, 2011-16, (%)



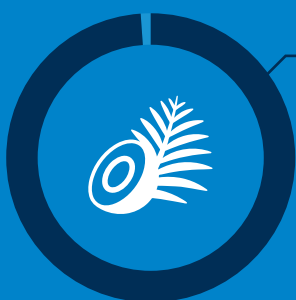
SHARE OF REGIONAL NET IMPORTS, 2011-16, (%)



TOP SOURCES OF SUPPLY 2018

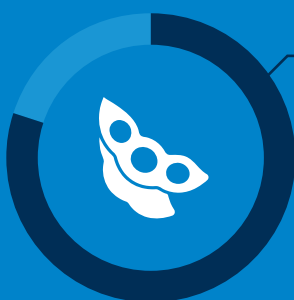
	Beef	Germany	Botswana	Nambia
	Cocoa	Peru	Ecuador	Belgium
	Coffee	Brazil	Colombia	Sweden
	Palm Oil	Sweden	Malaysia	Denmark
	Rubber	Malaysia	USA	Sweden
	Soy	Brazil	Canada	Ukraine
	Tropical Timber	Germany	Brazil	Denmark
	Wood Pulp	Sweden	Finland	Brazil

SUSTAINABILITY SOURCING PERFORMANCE



99%

of total palm oil used by members of the Norwegian Initiative for Sustainable Palm Oil (NISPO) in 2017 was certified sustainable palm oil



80%

of total soybeans, soybean meal, and soybean oil used in 2017 were FEAC-compliant and deforestation-free

(A) Import data is sourced from Food and Agriculture Organisation (FAO), International Tropical Timber Organisation (ITTO), and IDH. Net imports refer to total imports adjusted for re-exports. For tropical timber, the unit of measurement for net imports is 1000m3. For soy, net imports are based on 2017 data. Regional import data was aggregated from data of 28 European Union (EU) countries and 4 European Free Trade Association (EFTA) countries where data is available. Intra-regional trade is included in the regional figures. Data on top sources of supply is sourced from International Trade Centre (ITC). Data for wood pulp is based on import value, data for other commodities is based on import quantity. Re-exporters are included. (B) Data on sustainable sourcing performance is sourced from IDH.

GOVERNMENT & PRIVATE SECTOR INITIATIVES

EXAMPLES OF GOVERNMENT & PRIVATE SECTOR INITIATIVES



- Orkla and Mondelez Norge are active in promoting sustainable cocoa



- Parliament decision to exclude the use of high-deforestation risk biofuels, like palm oil, by 2020
- Blended finance debt fund “&Green” funded by the Norwegian government
- Norwegian Initiative for Sustainable Palm Oil (NISPO)



- Research Council of Norway is developing alternatives to deforestation-linked soy
- Norway’s International Climate and Forest Initiative (NICFI) funded IDH landscape programme in Brazil
- Norwegian Roundtable on Responsible Soy



- Ban on the use of tropical timber in public sector buildings and construction works
- The government pledged 145M kroner (US\$17M) to help prevent illegal logging

COMPANIES, FOREST 500 ASSESSMENT, 2018



Palm Oil



Soy



Tropical Timber

Total Score

Orkla Group	✓	✓	✓	3/5
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(C) Data on government & private sector initiatives is sourced from Forest 500, IDH and literature review for cocoa, palm oil, soy, and timber & paper. For data sourced from Forest 500, timber and paper were combined. Forest 500 selected companies based on: (1) risk of being linked to deforestation; and (2) influence within the political economy of deforestation. Ticks indicate commodity specific policies. Companies are assessed based on: (1) Intent & Awareness; (2) Commodity Commitments; (3) Scope & Ambition; (4) Reporting, Monitoring & Implementation; and (5) Social Commitments. Companies are scored out of 100 points, and these points are converted to between zero and five points.

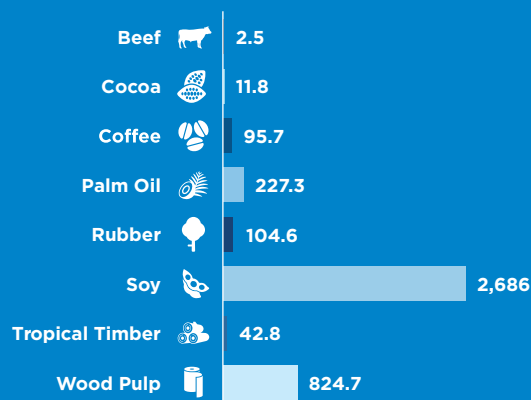


Poland



DEMAND & IMPORTS TRENDS

AVERAGE ANNUAL NET IMPORTS, 2011-16, '000 TONNES



AVERAGE NET IMPORT YOY GROWTH, 2011-16, (%)



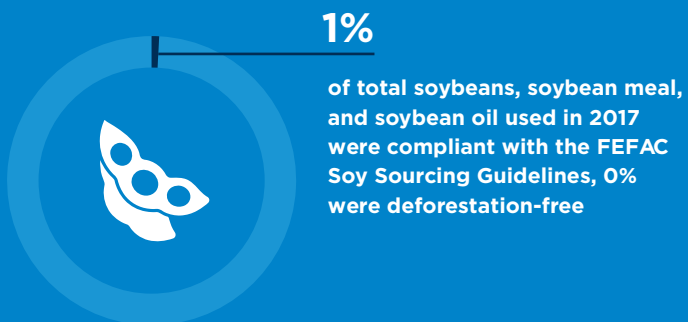
SHARE OF REGIONAL NET IMPORTS, 2011-16, (%)



TOP SOURCES OF SUPPLY 2018

	Beef	Italy	Romania	UK
	Cocoa	Netherlands	Côte d'Ivoire	Germany
	Coffee	Germany	Viet Nam	Brazil
	Palm Oil	Germany	Netherlands	Italy
	Rubber	Côte d'Ivoire	Indonesia	Germany
	Soy	Ukraine	Germany	Belgium
	Tropical Timber	Netherlands	Germany	Belgium
	Wood Pulp	Finland	Sweden	USA

SUSTAINABILITY SOURCING PERFORMANCE



(A) Import data is sourced from Food and Agriculture Organisation (FAO), International Tropical Timber Organisation (ITTO), and IDH. Net imports refer to total imports adjusted for re-exports. For tropical timber, the unit of measurement for net imports is 1000m3. For soy, net imports are based on 2017 data. Regional import data was aggregated from data of 28 European Union (EU) countries and 4 European Free Trade Association (EFTA) countries where data is available. Intra-regional trade is included in the regional figures. Data on top sources of supply is sourced from International Trade Centre (ITC). Data for wood pulp is based on import value, data for other commodities is based on import quantity. Re-exporters are included. (B) Data on sustainable sourcing performance is sourced from IDH.

GOVERNMENT & PRIVATE SECTOR INITIATIVES

EXAMPLES OF GOVERNMENT & PRIVATE SECTOR INITIATIVES



- The Polish Forum on Sustainable Palm Oil brought together over 90 stakeholders, including major retailers, consumer goods manufacturers, regional zoos and NGOs to discuss ways to promote sustainable palm oil.
- Betasoup has committed to 100% Roundtable on Sustainable Palm Oil (RSPO) certified palm oil by 2025

COMPANIES, WWFASSESSMENT, 2016



Palm Oil



Soy

Grupa Mlekovita	N.A	0/24
Pini Polonia	N.A	0/24

No Polish companies were assessed by Forest 500 in 2018

(C) Data on government & private sector initiatives is sourced from Forest 500, IDH and literature review for cocoa, palm oil, soy, and timber & paper. For data sourced from Forest 500, timber and paper were combined. Forest 500 selected companies based on: (1) risk of being linked to deforestation; and (2) influence within the political economy of deforestation. Ticks indicate commodity specific policies. Companies are assessed based on: (1) Intent & Awareness; (2) Commodity Commitments; (3) Scope & Ambition; (4) Reporting, Monitoring & Implementation; and (5) Social Commitments. Companies are scored out of 100 points, and these points are converted to between zero and five points.

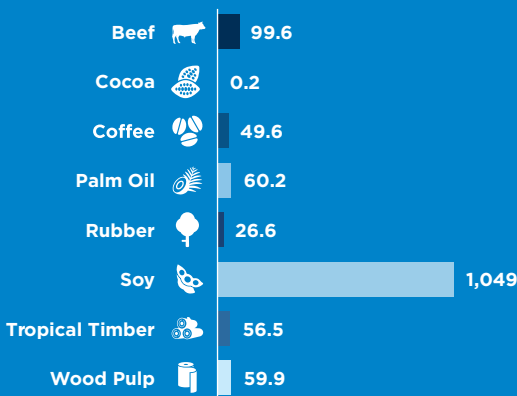


Portugal

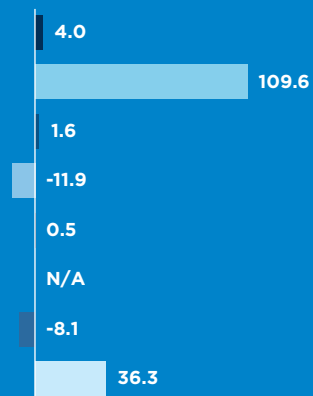


DEMAND & IMPORTS TRENDS

AVERAGE ANNUAL NET IMPORTS, 2011-16, '000 TONNES



AVERAGE NET IMPORT YOY GROWTH, 2011-16, (%)



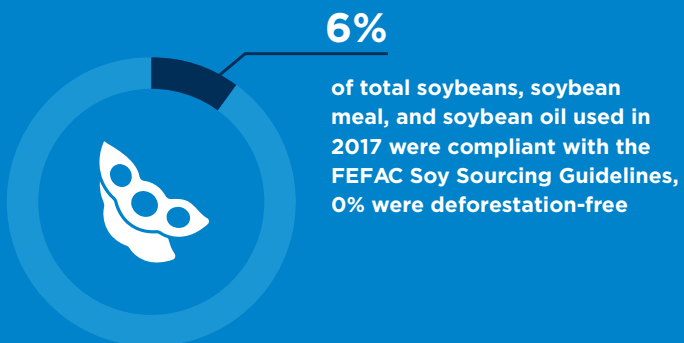
SHARE OF REGIONAL NET IMPORTS, 2011-16, (%)



TOP SOURCES OF SUPPLY 2018

	Beef	Spain	Netherlands	Poland
	Cocoa	Spain	Peru	Netherlands
	Coffee	Viet Nam	Brazil	Spain
	Palm Oil	Spain	Philippines	Netherlands
	Rubber	Indonesia	Côte d'Ivoire	Malaysia
	Soy	USA	Brazil	Paraguay
	Tropical Timber	Brazil	Cameroon	Gabon
	Wood Pulp	Sweden	Spain	UK

SUSTAINABILITY SOURCING PERFORMANCE



(A) Import data is sourced from Food and Agriculture Organisation (FAO), International Tropical Timber Organisation (ITTO), and IDH. Net imports refer to total imports adjusted for re-exports. For tropical timber, the unit of measurement for net imports is 1000m3. For soy, net imports are based on 2017 data. Regional import data was aggregated from data of 28 European Union (EU) countries and 4 European Free Trade Association (EFTA) countries where data is available. Intra-regional trade is included in the regional figures. Data on top sources of supply is sourced from International Trade Centre (ITC). Data for wood pulp is based on import value, data for other commodities is based on import quantity. Re-exporters are included. (B) Data on sustainable sourcing performance is sourced from IDH.

GOVERNMENT & PRIVATE SECTOR INITIATIVES

EXAMPLES OF GOVERNMENT & PRIVATE SECTOR INITIATIVES



- Jerónimo Martins has about 70% of its palm oil used certified by the Roundtable on Sustainable Palm Oil (RSPO) in 2018. The company aims to achieve its “Zero Net Deforestation Goal” by 2020



- The National Feed Manufacturers Association (IACA) is cooperating with soy producers in Mato Grosso for capacity building and fostering long-term supplies of sustainably produced soy
- Jerónimo Martins has 20% of its soy from countries at risk certified as Round Table on Responsible Soy (RTRS) or ProTerra in 2018



- In 2018, Jerónimo Martins has more than 90% of its timber and pulp products certified with standards such as the Forest Stewardship Council (FSC) and the Program for the Endorsement of Forest Certification (PEFC)

No Portuguese companies were assessed by WWF in 2016

No Portuguese companies were assessed by Forest 500 in 2018

(C) Data on government & private sector initiatives is sourced from Forest 500, IDH and literature review for cocoa, palm oil, soy, and timber & paper. For data sourced from Forest 500, timber and paper were combined. Forest 500 selected companies based on: (1) risk of being linked to deforestation; and (2) influence within the political economy of deforestation. Ticks indicate commodity specific policies. Companies are assessed based on: (1) Intent & Awareness; (2) Commodity Commitments; (3) Scope & Ambition; (4) Reporting, Monitoring & Implementation; and (5) Social Commitments. Companies are scored out of 100 points, and these points are converted to between zero and five points.

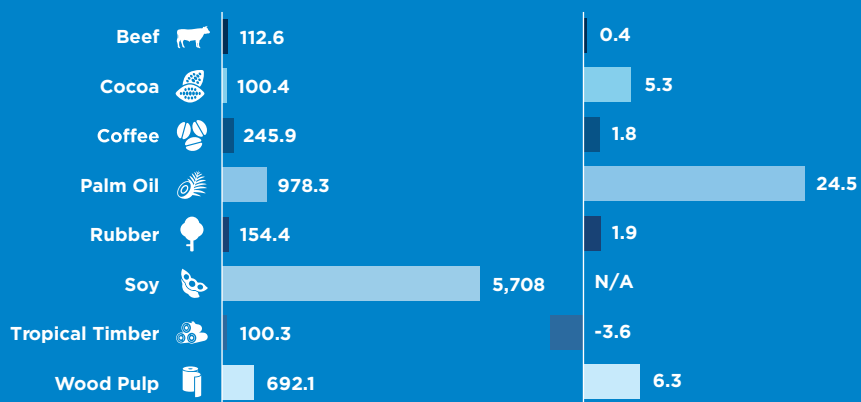


Spain

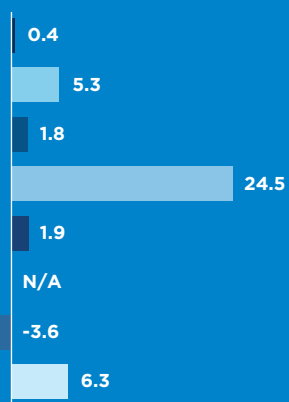


DEMAND & IMPORTS TRENDS

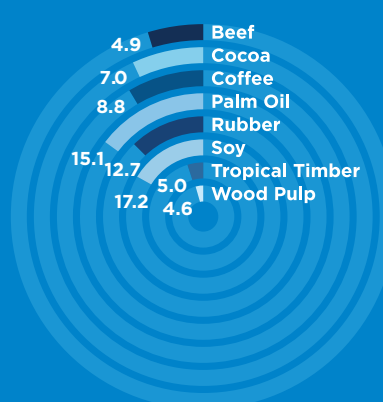
AVERAGE ANNUAL NET IMPORTS, 2011-16, '000 TONNES



AVERAGE NET IMPORT YOY GROWTH, 2011-16, (%)



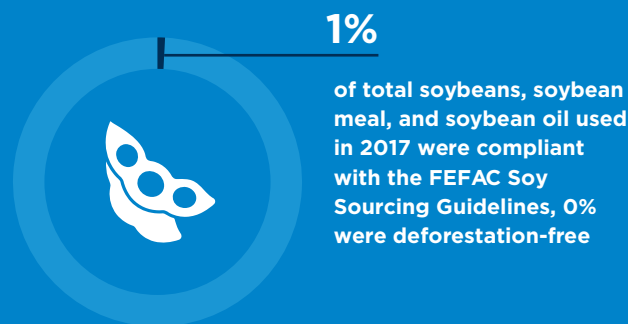
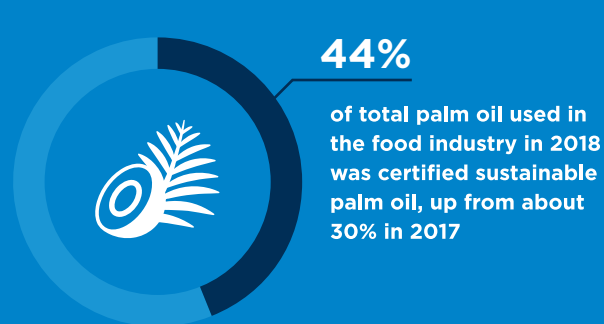
SHARE OF REGIONAL NET IMPORTS, 2011-16, (%)



TOP SOURCES OF SUPPLY 2018

	Beef	Poland	Netherlands	Germany
	Cocoa	Côte d'Ivoire	Ghana	Cameroon
	Coffee	Viet Nam	Brazil	Germany
	Palm Oil	Indonesia	Malaysia	Colombia
	Rubber	Côte d'Ivoire	Indonesia	Thailand
	Soy	Brazil	USA	Ukraine
	Tropical Timber	Brazil	Cameroon	Peru
	Wood Pulp	France	Brazil	Portugal

SUSTAINABILITY SOURCING PERFORMANCE



(A) Import data is sourced from Food and Agriculture Organisation (FAO), International Tropical Timber Organisation (ITTO), and IDH. Net imports refer to total imports adjusted for re-exports. For tropical timber, the unit of measurement for net imports is 1000m3. For soy, net imports are based on 2017 data. Regional import data was aggregated from data of 28 European Union (EU) countries and 4 European Free Trade Association (EFTA) countries where data is available. Intra-regional trade is included in the regional figures. Data on top sources of supply is sourced from International Trade Centre (ITC). Data for wood pulp is based on import value, data for other commodities is based on import quantity. Re-exporters are included. (B) Data on sustainable sourcing performance is sourced from IDH.

GOVERNMENT & PRIVATE SECTOR INITIATIVES

EXAMPLES OF GOVERNMENT & PRIVATE SECTOR INITIATIVES



- The Spanish Foundation for Sustainable Palm Oil aims to promote sustainable palm oil and balance the debate on health and sustainability issues through research, information sharing, and multi-stakeholder dialogues



- Public procurement policy requiring sustainable sourcing of furniture and paper products
- Madrid City Hall together with WWF Spain organised a workshop about public procurement as a tool for promoting sustainable forest management
- The Spanish Timber Trade Association (AEIM) offers a due diligence tool for timber buyers
- The Madera Justa platform aims to promote certified forest products and stop imports of illegal wood into Spain

COMPANIES, FOREST 500 ASSESSMENT, 2018



Palm Oil



Soy



Tropical Timber

Total Score

Inditex S.A.			✓	2/5
Ebro Foods	✗	✗	✗	1/5
Alonso Group			✗	0/5

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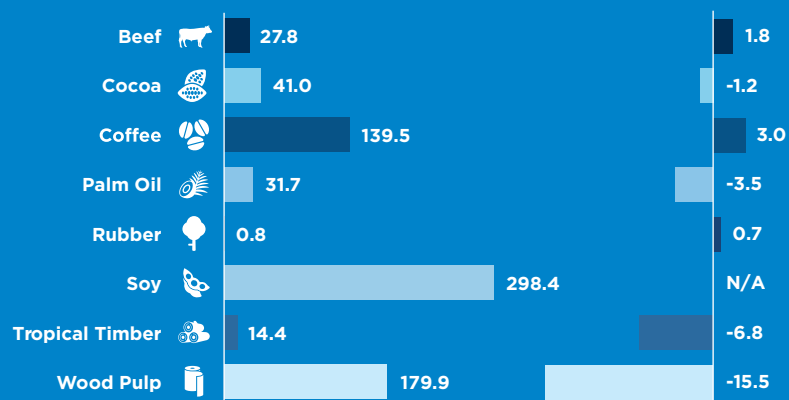


Switzerland

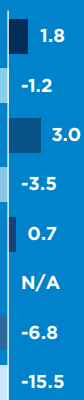


DEMAND & IMPORTS TRENDS

AVERAGE ANNUAL NET IMPORTS, 2011-16, '000 TONNES



AVERAGE NET IMPORT YOY GROWTH, 2011-16, (%)



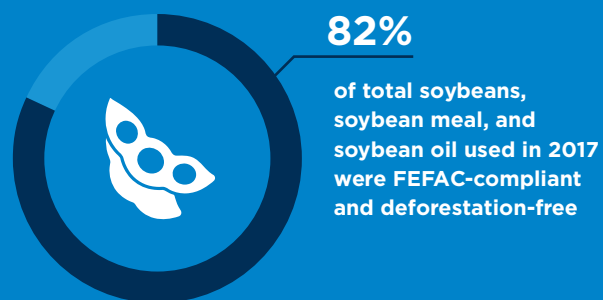
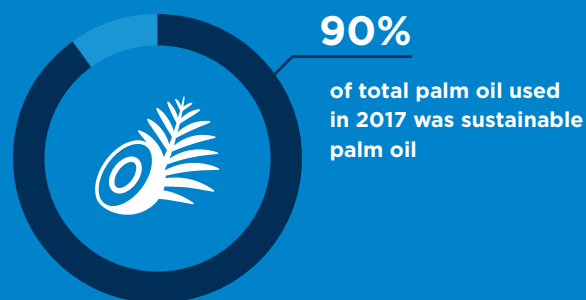
SHARE OF REGIONAL NET IMPORTS, 2011-16, (%)



TOP SOURCES OF SUPPLY 2018

	Beef	Germany	Austria	Ireland
	Cocoa	Ghana	Ecuador	Côte d'Ivoire
	Coffee	Brazil	Colombia	Viet Nam
	Palm Oil	Malaysia	Solomon Islands	Papua New Guinea
	Rubber	Viet Nam	Thailand	Italy
	Soy	France	Ukraine	Austria
	Tropical Timber	Germany	Brazil	Congo
	Wood Pulp	Sweden	Germany	Brazil

SUSTAINABILITY SOURCING PERFORMANCE



(A) Import data is sourced from Food and Agriculture Organisation (FAO), International Tropical Timber Organisation (ITTO), and IDH. Net imports refer to total imports adjusted for re-exports. For tropical timber, the unit of measurement for net imports is 1000m3. For soy, net imports are based on 2017 data. Regional import data was aggregated from data of 28 European Union (EU) countries and 4 European Free Trade Association (EFTA) countries where data is available. Intra-regional trade is included in the regional figures. Data on top sources of supply is sourced from International Trade Centre (ITC). Data for wood pulp is based on import value, data for other commodities is based on import quantity. Re-exporters are included. (B) Data on sustainable sourcing performance is sourced from IDH.

GOVERNMENT & PRIVATE SECTOR INITIATIVES

EXAMPLES OF GOVERNMENT & PRIVATE SECTOR INITIATIVES



- Swiss Platform for Sustainable Cocoa supported by Swiss Federal Government



- Trade agreement with Indonesia to ensure sustainable production of palm oil
- Swiss Palm Oil Coalition



- The European Soy Event “Challenges and opportunities for supermarkets” funded by Swiss State Secretariat for Economic Affairs
- The Soy Network provides criteria to ensure sustainable sourcing of soy for animal feed



- Public procurement policy requiring legal and sustainable sourcing of timber
- Swiss Declaration Requirement requiring companies to declare species of wood and country of origin
- Timber Products Switzerland (HWS) and Swiss Veneer Association (SFV) are promoting legal timber among their members and consumers

COMPANIES, FOREST 500 ASSESSMENT, 2018



	Palm Oil	Soy	Tropical Timber	Total Score
Nestlé S.A.	✓	✓	✓	5/5
Cofra			✓	2/5
Bata LTD.			✗	1/5
Danzer Group			✓	1/5
Glencore	✗	✗		1/5
Lindt & Sprungli AG	✓	✗	✗	1/5
Precious Woods Holding AG			✓	1/5
Ameropa LTD.	✗	✗		0/5

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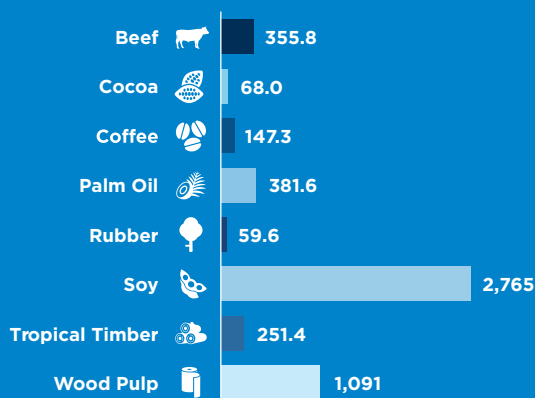


United Kingdom

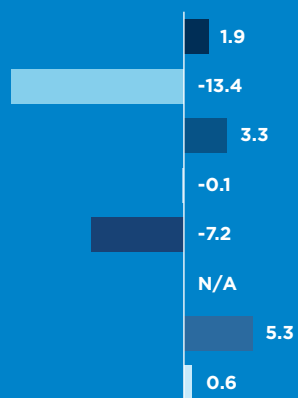


DEMAND & IMPORTS TRENDS

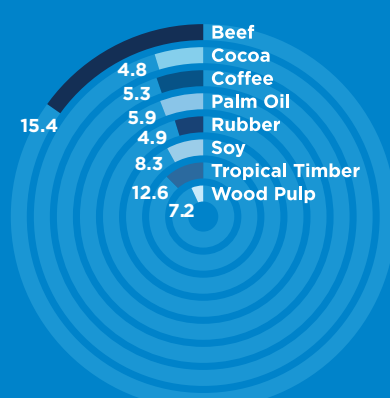
AVERAGE ANNUAL NET IMPORTS, 2011-16, '000 TONNES



AVERAGE NET IMPORT YOY GROWTH, 2011-16, (%)



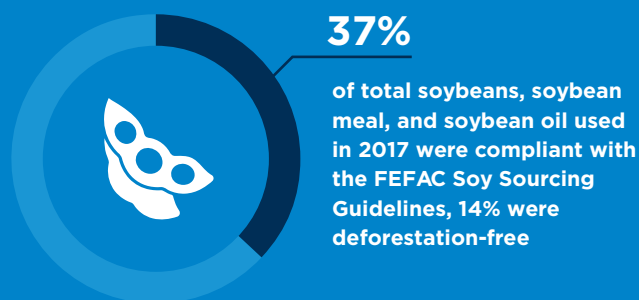
SHARE OF REGIONAL NET IMPORTS, 2011-16, (%)



TOP SOURCES OF SUPPLY 2018

	Beef	Ireland	Poland	Netherlands
	Cocoa	Côte d'Ivoire	France	Ghana
	Coffee	Brazil	Viet Nam	Colombia
	Palm Oil	Papua New Guinea	Netherlands	Indonesia
	Rubber	Malaysia	Thailand	Côte d'Ivoire
	Soy	Brazil	USA	Belgium
	Tropical Timber	Malaysia	Cameroon	Netherlands
	Wood Pulp	Sweden	Brazil	Netherlands

SUSTAINABILITY SOURCING PERFORMANCE



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GOVERNMENT & PRIVATE SECTOR INITIATIVES

EXAMPLES OF GOVERNMENT & PRIVATE SECTOR INITIATIVES



- Sustainable procurement policy requiring purchases of “fairly traded” chocolate
- Cocoa and Forests Initiative to end deforestation in West Africa
- Climate-smart cocoa agriculture in Ghana supported by UK aid



- UK Government Buying Standard
- Roundtable on Sourcing Sustainable Palm Oil
- Africa Palm Oil Initiative supported by the DFID



- Roundtable on Sustainable Soya
- UK Zero Deforestation Soy Transition Plan led by Tesco



- Timber Procurement Policy
- DFID supported ClientEarth in tackling illegal timber trade in Africa
- Responsible Purchasing Policy developed by the Timber Trade Federation (TTF)

COMPANIES, FOREST 500 ASSESSMENT, 2018



Palm Oil



Soy



Tropical Timber

Total Score

	Palm Oil	Soy	Tropical Timber	Total Score
Marks & Spencer	✓	✓	✓	4/5
Unilever	✓	✓	✓	4/5
Kingfisher			✓	3/5
Pearson			✓	3/5
Reckitt Benckiser	✓		✓	3/5
Relx Group			✓	3/5
Associated British Foods	✓	✓	✓	2/5
Boparan Holdings	✓	✓	✓	2/5
GlaxoSmithKline	✓		✓	2/5
J Sainsbury's	✓	✓	✓	2/5
Tesco	✓	✓	✓	2/5
Wm Morrison Supermarkets	✓	✓	✓	2/5
C&J Clark International			✗	1/5
Capri Holdings Limited			✗	1/5
INEOS Group		✗		0/5

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<https://www.idhsustainabletrade.com/tacklingdeforestation>