



THE SOY STORY REVISITED

HOW RETAILERS' COMMITMENTS TO
TACKLING SOY-DRIVEN DEFORESTATION
AND CONVERSION COMPARE

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Front cover: Soya or Soy beans (Glycine soja) plantation, Paraná, Brazil. © Michel Gunther / WWF

This page: Triggered forest fire and deforestation for planting soybeans. © Andre Dib / WWF-Brazil.

EXECUTIVE SUMMARY

- Soy production – primarily for use in animal feed – continues to be a major driver of forest and habitat loss. Despite efforts to decouple deforestation and habitat conversion from commodity supply chains, **2025 targets set by retailers will be missed.**
- This Scorecard, developed by WWF, evaluates UK retailers across five criteria, awarding scores based on the strength of their strategies, action plans, and broader efforts to deliver deforestation- and conversion-free (DCF) soy.
- UK retailers are leading the way globally, with **10 out of 11** of the UK's major supermarkets having clear, robust commitments to source and support the transition to DCF soy production, with public plans outlining their strategies for achieving these goals. This represents significant leadership from within the sector and should send a strong demand signal for DCF soy in the UK and beyond.
- **Sainsbury's** and **Waitrose** – representing 10% of UK grocery market – stand out with leading strategies, earning top marks against scoring criteria. Both have set out a clear pathway to source DCF soy, are supporting industry-wide transformation, and are investing in support for the transition to sustainable soy production.
- Three retailers – **Sainsbury's**, **Tesco**, and **Waitrose** – have shown leadership by investing in initiatives to tackle the barriers to achieving DCF landscapes in high-risk sourcing regions¹, recognising the role soy-sourcing companies must play in supporting an equitable transition for soy producers.
- The scoring shows that **Iceland** and **Asda** – representing almost 15% of the UK grocery market – are lagging behind, with less engagement in industry-wide initiatives than their peers. **Tesco** and **Iceland** were also the only retailers to not meet the criteria for disclosure.
- Whilst this Scorecard focuses on UK supermarkets, the criteria are applicable to any company sourcing soy.

With the window to safeguard our forest ecosystems rapidly closing, responsible companies must accelerate action to tackle deforestation and habitat conversion. WWF urges all soy-sourcing companies to use this scorecard to evaluate and strengthen their own policies and practices.

INTRODUCTION

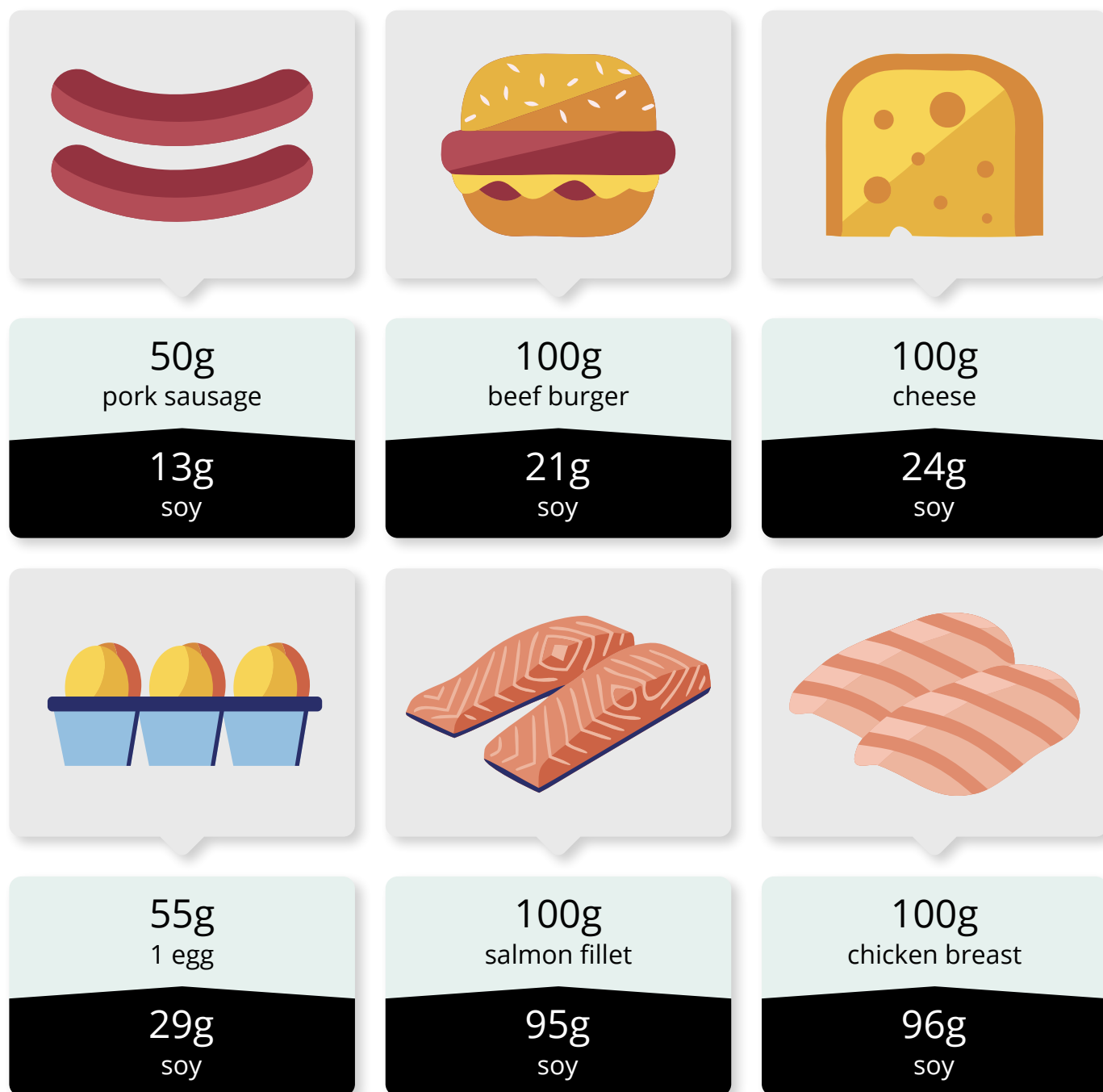
Soybeans are one of the most important crops in the world, yet few of us are aware of how much soy we eat – because we tend to consume it indirectly. The animals we eat, or from which we consume eggs or milk, are fed with soy. In fact, almost 80% of the world's soybean crops are fed to livestock, especially for chicken, pork, salmon, egg, and dairy production (milk, cheeses, butter, yogurt, etc). Soy oil is also commonly used for cooking and can also be found in margarine, chocolate, non-dairy milks, ice cream or baked goods, as well as in cosmetics and soaps.

Our hunger for this bean has led to vast amounts of deforestation and habitat conversion in some of our most precious places, particularly in South America. The Cerrado, a vast tropical savanna, neighbouring the Amazon, a lesser-known ecosystem that is 8 times the size of the United Kingdom, is home 5% of the world's biodiversity. The Cerrado also plays a vital role in the fight against climate change, storing 13.7 billion tonnes of carbon² – more than 36 times the annual net carbon emissions from the UK in 2024³. Once covering an area half the size of Europe, only 20% of the Cerrado's original vegetation remains intact. The Cerrado facilitates the water cycle that keeps the Amazon alive, but in 2024 suffered its worst drought recorded in over 700 years⁴ due to climate change and increased water stress in the region.

Without tackling global appetite for meat and animal products, further demand for soy fuels greater pressure on the wooded grasslands of the Cerrado, and other ecosystems like the Gran Chaco in Argentina and Paraguay. The UK is an important market for soybeans and given the environmental impact of production, it must act on its responsibility to end soy driven deforestation and habitat conversion globally.

Companies that source soy products have a clear responsibility to account for their environmental impacts and ensure that consumers are not unknowingly contributing to deforestation and habitat conversion. As global trade faces increasing volatility, and with climate and nature pressures intensifying, 2025 must mark a decisive shift from ambition to implementation. To make this shift, companies must move beyond voluntary pledges to deliver credible, transparent, and measurable actions that address the root drivers of deforestation and conversion across their supply chains. With COP30 in Belém, Brazil on the horizon, there is an opportunity for companies to stand with government leaders and show their commitment to tackling this critical global challenge.

HOW MUCH SOY AM I EATING?



The soy in animal feed connects our everyday meals to deforestation in places like the Cerrado. Food companies have the power — and responsibility — to break that link and ensure our food protects nature instead of destroying it.

SO WHERE ARE WE NOW?

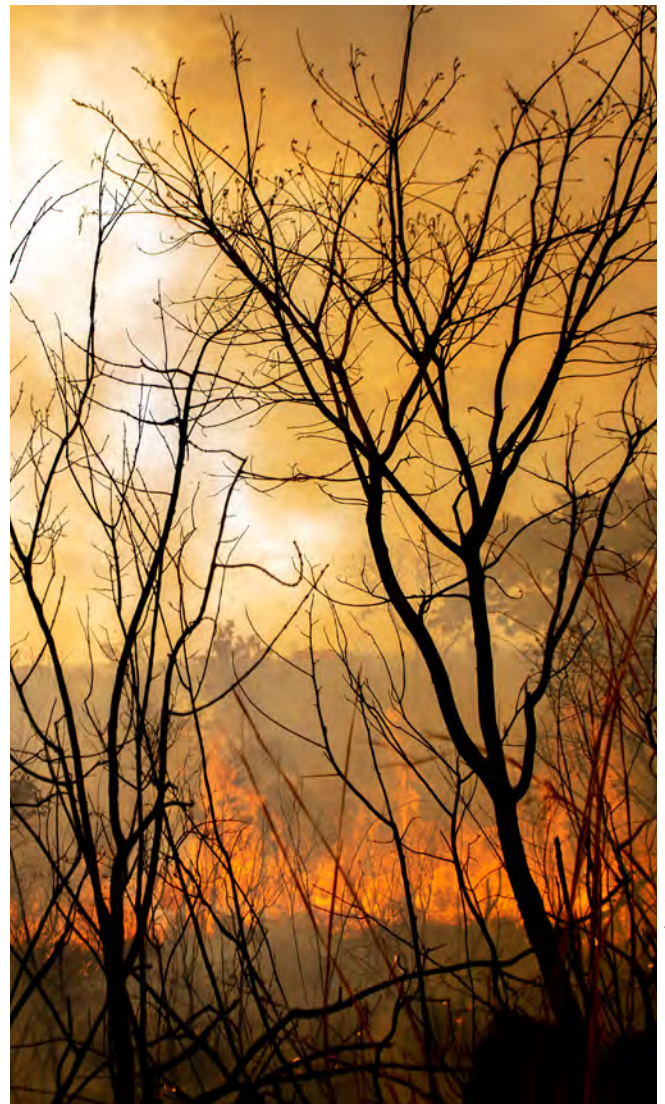
Over the past two decades, many food companies have attempted to tackle deforestation through voluntary efforts. But the truth is: these actions alone haven't been enough to stop forests from being cleared. In 2025, we are still consuming food that is destroying forests.

The transition to DCF soy remains difficult due to the complexity of the supply chain. Mass-mixing of soy and inadequate traceability systems mean it is currently not possible to trace imported soybean back to the farm it was produced on. The UK government already has a potential solution: a law that would require businesses to check where the food they are buying comes from and take responsibility for destructive production impacts. Despite UK Government committing to this law in 2021, it has yet to be enacted. Meanwhile, the EU's equivalent, EUDR, has been delayed by a further year, despite promises to implement it in 2023. These delays only allow destruction to rage on, and leave companies in limbo on how to ensure their businesses can operate within the law.

Powerful actors in the soy supply chain, responsible for the trading of soy, are responding to demand for DCF soy, but largely by sourcing from low-risk regions, such as the United States, while continuing to support destructive business-as-usual practices in other markets. This means that high-risk regions are missing out on access to DCF soy markets and the financial support needed for a sustainable transition.

Shifting supply away from these regions does little to reduce overall deforestation. Additionally, the lack of economic incentives remains a major barrier to adopting more sustainable practices.

Now more than ever, it is critical that companies actively support the transition to DCF and sustainable soy production – and call on governments to provide the regulatory and financial frameworks needed to make this shift possible.



RESULTS AND RECOMMENDATIONS

WWF has developed this Soy Scorecard as a tool to help companies assess their impacts related to soybean production, given soy's disproportionate role in driving forest destruction. The Scorecard serves both as a guide and an incentive – offering companies a framework to understand how to reduce soy-related impacts in food systems, while recognising those making meaningful progress.

The Scorecard is built around five key criteria that WWF has identified as critical for reducing supply chain impacts on deforestation and habitat conversion.

- 1 Strength of commitments**
- 2 Transparency and quality of disclosure**
- 3 Support for industry-wide action and standards**
- 4 Advocacy for effective government policies**
- 5 Investment in high-risk sourcing regions to support producers**

WHAT OUR SCORING SHOWED

UK retailers have long recognised the increasing risks of deforestation on their ability to stock shelves in the long-term. That is why they set critical targets to achieve 100% DCF supply chains by the end of 2025. This concerted effort by UK retailers is world-leading for their sector, but the 2025 targets are set to be missed. The critical next step will be the courage to retain these commitments with determination, rather than delaying further.

Transparency over how retailers are progressing on these targets is critical to identifying solutions. Encouragingly, 9 out of 11 retailers are already meeting WWF's minimum expectations for up to date, public disclosure on how their soy is sourced, distinguishing between different mechanisms to reduce their impact on forests. The Co-op demonstrated best practice on disclosure, with transparent and comprehensive reporting. Tesco and Iceland missed the mark this year on disclosure, based on out of date or unclear reporting, but it is expected that they should reach this standard of disclosure in their next reporting cycle.

Almost all retailers are backing the development of a robust, industry-wide DCF standard for soy imports through their membership in the UK Soy Manifesto (UKSM). Their action in this group and investment in the standard for animal feed is designed to be globally applicable, which could have a transformative impact on shifting markets beyond the UK. Asda are the only non-members of the UKSM and are encouraged to support the development and adoption of these standards across their supplier base. Lidl-Int has gone one step further and is supporting methods to verify the physical flow of DCF soy shipments from Brazil to France and Germany, in conjunction with soy traders and the Earthworm Foundation⁵.

In order to achieve DCF goals, it is critical to support producers in the transition to DCF production landscapes. Sainsbury's, Tesco,

and Waitrose are putting commitments into action, investing directly in sustainable production by incentivising farmers to protect native vegetation in high-risk regions, like Ipiranga do Norte in Mato Grosso and Mineiros in the State of Goiás. Beyond 2025, WWF expects companies to publicly report on scale of their investments, following suit of Waitrose, who reports a high level of investment into landscape initiatives, taking into consideration the relative amount of soy they source. Sainsbury's have also invested in an additional initiative to support sustainable agriculture in soy and cattle producing landscapes in Western Mato Grosso. These systemic investments are critical to overcoming persistent barriers to the DCF transition—particularly as governments and other powerful supply chain actors continue to fall short.



SCORING METHOD

WWF assessed UK retailers' soy policies, using only publicly available information, to see how they stack up against key criteria that WWF believes are essential to having a robust policy.

WWF have awarded a score based on five assessment criteria (shown in Table 1 in the annex). There was one point available per criteria, aside from investment in landscape initiatives, which could score up to 3 points. Supermarkets could therefore achieve a maximum score of seven points, based on how far their policies, disclosures, and wider efforts are stacking up to advance progress towards

deforestation- and conversion-free soy. WWF have highlighted retailers who have demonstrated best practice for specific criteria.

The scoring criteria used in this assessment is by no means an exhaustive list but instead represents what WWF see as the most important contributions, that all soy-using companies should be taking in the wake of missed 2025 targets.

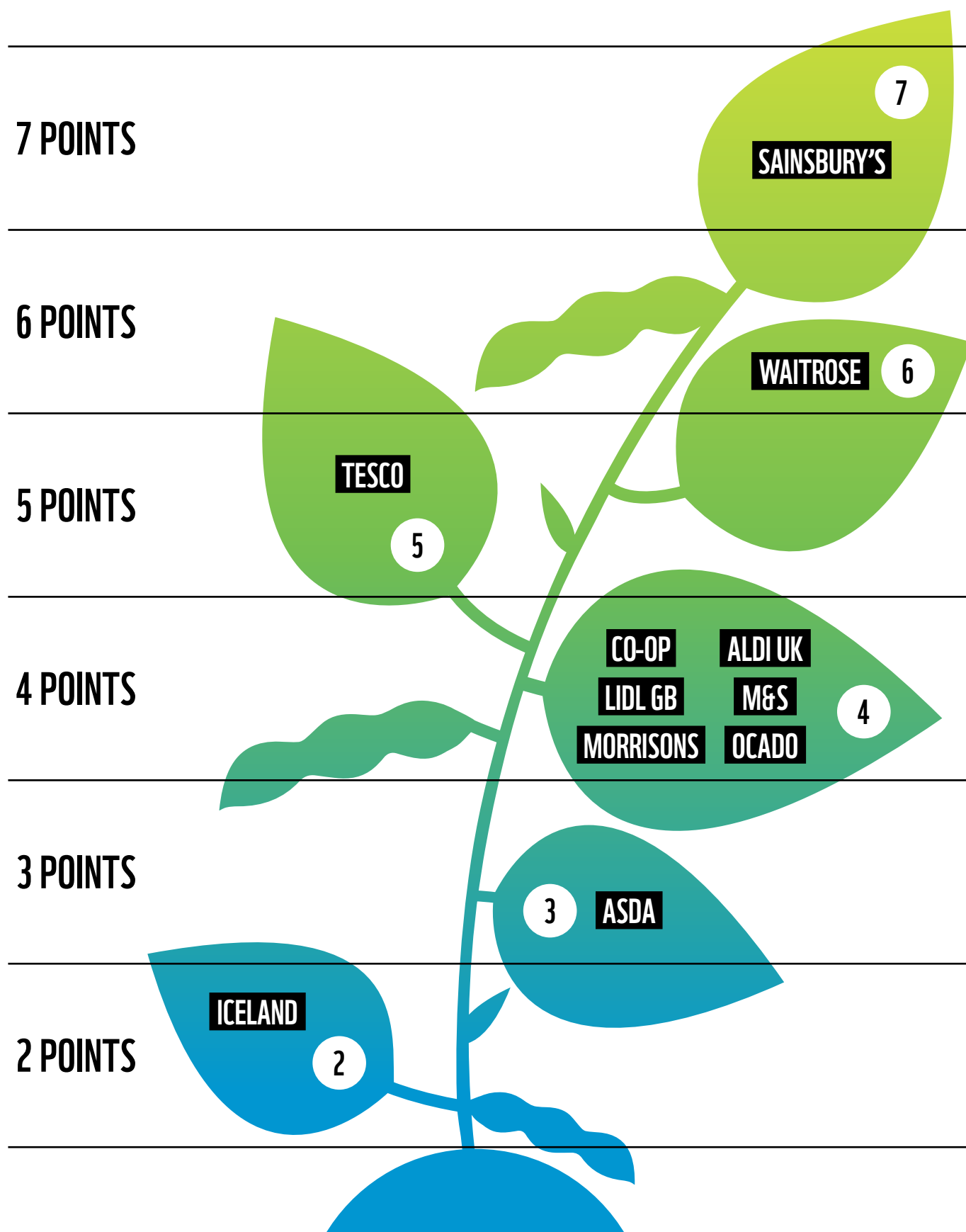
The strategies assessed include those from Aldi, Asda, Co-op, Iceland, Lidl, M&S, Morrisons, Ocado, Sainsbury's, Tesco, and Waitrose. See Table 2 in the annex for further information about where we found retailers' policies.

Table 1: UK retailers' performance against the six assessment criteria used for this scoring exercise. More information on our scoring criteria can be seen in Table 2.

Retailer	Commitment	Disclosure	Market standards	Advocacy action	Investment	Points
Sainsbury's	1	1	1	1	3	7
Waitrose	1	1	1	1	2	6
Tesco	1	0	1	1	2	5
Co-op	1	1	1	1	0	4
Aldi UK	1	1	1	1	0	
Lidl GB	1	1	1	1	0	
M&S	1	1	1	1	0	
Morrisons	1	1	1	1	0	
Ocado	1	1	1	1	0	
Asda	1	1	0	1	0	3
Iceland	1	0	1	0	0	2

Key:  Best practice demonstrated  2/3 points – Foundational  4/5 points – Good practice  6/7 points – Industry leading

WWF-UK'S SUPERMARKET SOY POLICY SCORECARD



WHAT NEXT?

Commitments and policies are just the first step on the journey to tackle deforestation and habitat conversion. Food companies, including retailers, that are lagging behind should use this scorecard to assess where they could go further. These are the four recommendations we make to all food companies to demonstrate leadership in the path ahead:

1

Enhance visibility and traceability for deforestation and conversion free (DCF) sourcing. Support and adopt robust standards on soy imports and implement into contractual agreements with suppliers, creating a consistent and credible framework to effectively evidence DCF sourcing.

2

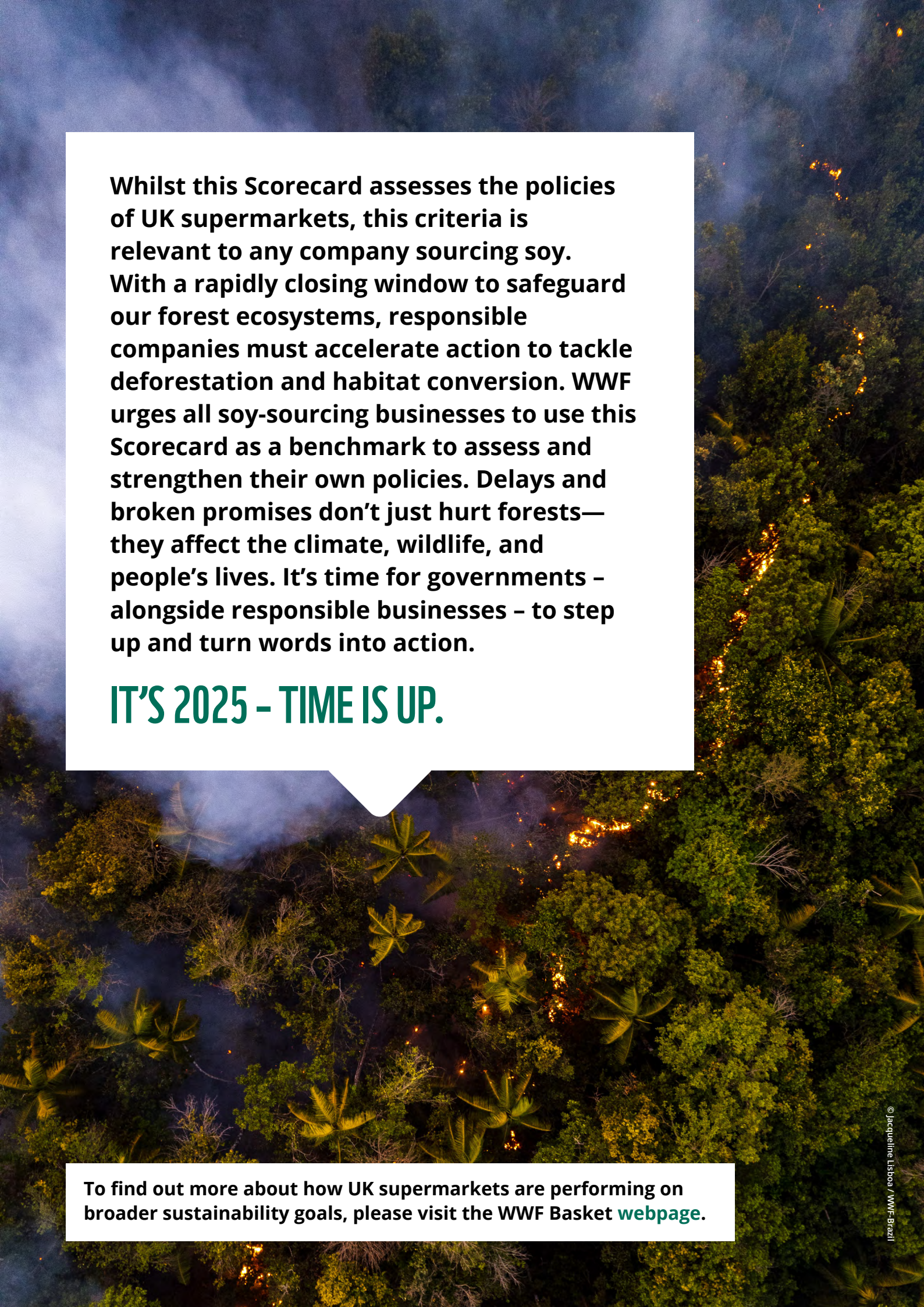
Invest in the protection & restoration of land, supporting landowners with responsible stewardship. There is critical need for finance in high-risk regions, such as the Cerrado in Brazil, which currently produces around 60% of Brazilian soy, leading to rapid loss of vegetation. Investment will enable the protection of habitats and restore degraded land, provide support to producers for sustainable production, reduce greenhouse gas emissions, and relieve ongoing pressures within production landscapes.

3

Advocate government to ensure that legal frameworks are put in place to support a whole shift to DCF supply chains. Companies should use their voice to advocate for legislative and policy changes that would support and enable their businesses and suppliers to make the transition to deforestation and conversion-free soy.

4

Take action in each of these areas while providing public transparency of plans, milestones, and progress in accordance with the recommendations of the globally recognised Accountability Framework initiative.

An aerial photograph of a dense tropical forest at night. The canopy is illuminated by numerous small, bright orange and yellow fires burning within the trees, creating a stark contrast with the dark green foliage. The smoke from the fires is visible, drifting upwards into the dark sky. The overall scene conveys a sense of environmental crisis and deforestation.

Whilst this Scorecard assesses the policies of UK supermarkets, this criteria is relevant to any company sourcing soy. With a rapidly closing window to safeguard our forest ecosystems, responsible companies must accelerate action to tackle deforestation and habitat conversion. WWF urges all soy-sourcing businesses to use this Scorecard as a benchmark to assess and strengthen their own policies. Delays and broken promises don't just hurt forests—they affect the climate, wildlife, and people's lives. It's time for governments – alongside responsible businesses – to step up and turn words into action.

IT'S 2025 – TIME IS UP.

To find out more about how UK supermarkets are performing on broader sustainability goals, please visit the WWF Basket [webpage](#).

ANNEX

Table 2: The five assessment criteria used to score retailers' soy policies.

Criteria Area	Criteria	Scoring Guidance	Points available
Commitments	Retain time-bound commitments to sourcing 100% DCF soy	Company has set a public commitment for DCF soy supply chains with a minimum cut-off date of 2020 and 2025 target date. The commitment should align with Accountability Framework initiative (AFi)⁶ aligned definitions. The company should retain this target date in published materials and disclosures throughout the 2026 disclosure cycle, when progress made by the end of 2025 will be communicated.	1
Disclosure	Disclose risk, performance, and progress towards achieving commitment	Company reports annually on progress towards their commitment, disclosing risk and performance, related to eliminating deforestation and habitat conversion from supply chains. Disclosures should cover the full scope of the company's production and sourcing, including quantitative information on physical DCF materials, according to the AFi's recommendation. Transitional mechanisms that support sustainable soy production but are not verified DCF should be reported separately. In its disclosures, the company should identify gaps related to fulfilling its commitment by the target date, what the company is doing to close them in specific segments of its supply chains, and when the commitment will be fulfilled.	1
Industry Participation & Standards	Support and adopt robust DCF standards on soy imports and implement into contractual agreements with suppliers	Company funds and supports the development and implementation of an independent and globally applicable DCF standard for monitoring, reporting and verifying DCF soy embedded in products and supply chains. In the UK, this includes adopting the AIC EUDR-aligned standard⁷ for which % deforestation free can be reported. To cover the full scope of DCF soy sourcing, companies support the development and adoption of a DCF animal feed standard with the British Standards Institute (BSI). This standard should be AFi aligned.	1

Criteria Area	Criteria	Scoring Guidance	Points available
Advocacy & Action	Advocate for robust regulation and national forest protection agreements	Company demonstrates active participation in cross-industry platforms seeking to increase uptake of sustainable soy. The company is public in advocacy calls to government on the need for robust and supportive policy frameworks, such as the EUDR and the equivalent for UK Forest Risk Commodities legislation, as well as demonstrable support for long-standing forest protection agreements in key sourcing regions, such as the Amazon Soy Moratorium.	1
Investment*	Invest in the sustainable production of soy by supporting protection of native vegetation in high-risk sourcing regions	Company provides investment to incentivise sustainable production in high-risk regions to transition to DCF landscapes. Initiatives with strict DCF production outcomes, targeted at regions with high-risk of deforestation and conversion, and incentives for producers are the priority. Points will be awarded based on the scale, credibility, and integrity of the initiative. 2 points for investment in initiatives such as the Responsible Commodities Facility Cerrado Programme 1. • Investment in DCF (minimum) production of soy by supporting landowners with responsible stewardship, providing finance to credible initiatives that incentivise soy farmers to protect native vegetation. 1 point for initiatives such as the Western Mato Grosso Landscape Initiative with PCI or the Sorriso landscape project with Earthworm and PCI. • Providing finance to support producers and landowners to protect and restore native vegetation, where the impacts may not result in full DCF production but increase sustainable practices with region.	Maximum 3 points available.

*Disclaimer: WWF-UK is not authorised to conduct regulated investment activities and consequently none of the information presented on the projects presented is intended to constitute investment advice to be any investor, promotion of a specific investment opportunity or other form of regulated investment activity.

Table 3: List of UK supermarket retailers included in this analysis, along with links to company web pages which were used to allocate points, correct as of 13 October 2025.

Retailer	Information used to inform analysis
Aldi	Deforestation policy
Asda	Zero Deforestation commitment
Co-op	Soy Commitment Sustainability reporting
Iceland	Sustainable sourcing – soy
Lidl	Soy policy DCF buying policy
M&S	Soy policy
Morrisons	Soy policy
Ocado	Soy Supplier Requirements
Sainsbury's	Requirements for Soy Feed Nature Positive Commitments Proforest PCI Western Mato Grosso
Tesco	Sustainability Report 2025 Approach to Disclosure Protecting Forests Factsheet (2023)
Waitrose	Ethic and Sustainability webpage Soy policy 2024/2025 Sustainability report
Additional public facing communications	Investment in the BSI DCF animal x deforestation regulations Signed letter to traders on the Amazon Soy Moratorium

ENDNOTES

¹ Responsible Commodities Facility (2025)

² WWF (N.D.)

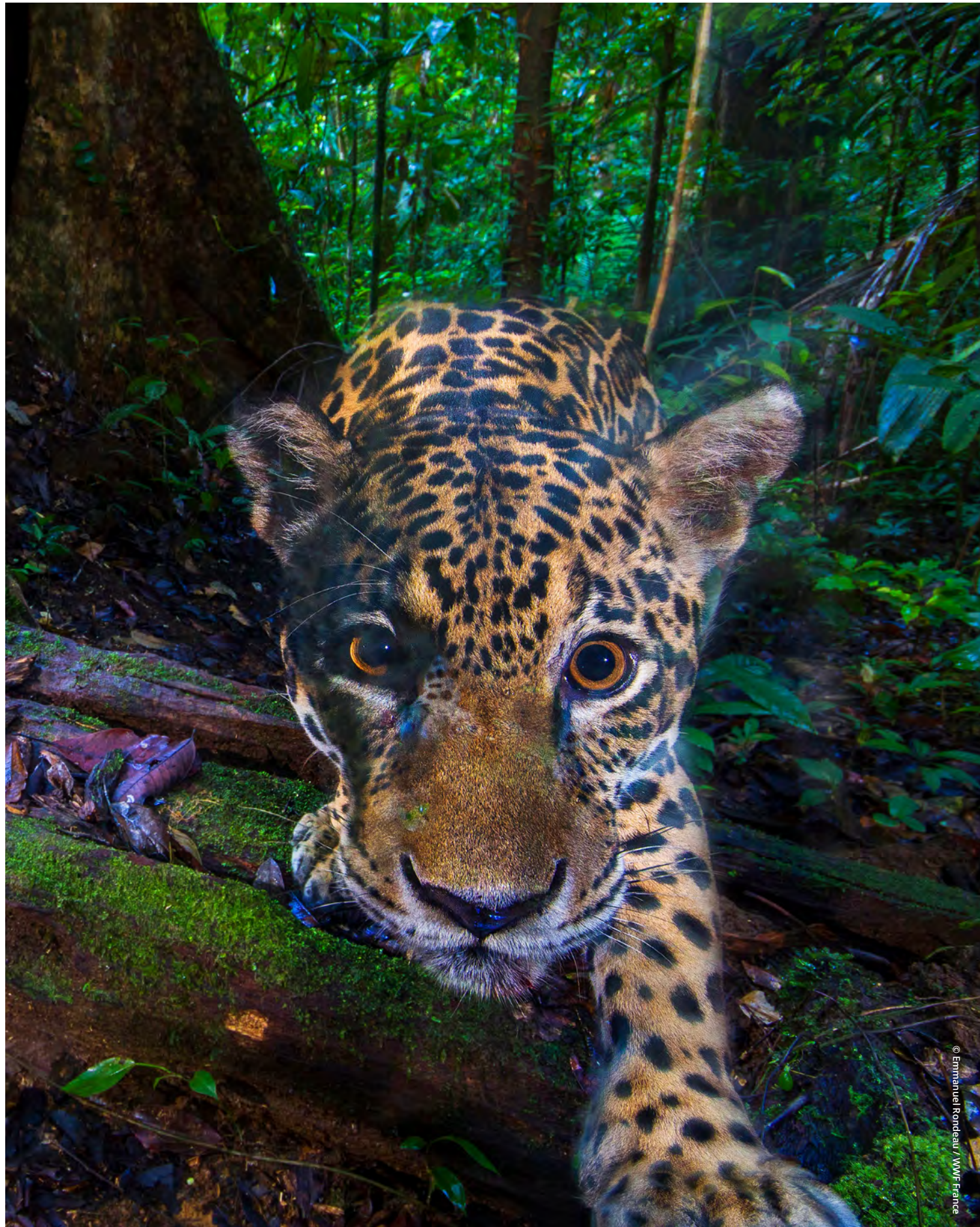
³ GOV-UK (2025)

⁴ Nature (2024)

⁵ Earthworm (N.D)

⁶ Accountability Framework initiative (2025)

⁷ Agricultural Industry Confederation (2024)



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