



**Feed Radar 2023 –
Environmental destruction and human rights
violations linked to animal feed –
are companies taking responsibility?**

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Introduction

In Germany, the demand for foods of animal origin, such as meat and dairy products, remains very high, despite the considerable negative impacts on the environment, health and animal welfare. The need to use a vast amount of land for feed production poses a particular problem, as it leads to the loss of ecosystems that are vital for protecting the climate and species, causes competition for land for the production of food for direct human consumption and stirs up social conflicts in some crop-growing regions. Around 60 per cent of the grain grown in the European Union is fed to livestock. Despite this, domestic feed production is nowhere near enough to meet the needs of the around 10 million cattle, 20 million pigs and 160 million poultry in Germany alone. As a result, Germany remains highly dependent on imports of soy-based feed, mostly from South America, and palm oil continues to be an important feed additive.

Rainforests, dry forests, wetlands and grasslands in South America and Asia are being destroyed, partly to produce feed containing palm oil and soy for livestock farming in Germany. Around 11 per cent of global greenhouse gas emissions can now be attributed to these kinds of changes in land use. Habitat loss is also affecting the last remaining strongholds of unique biodiversity in places like Indonesia, Brazil and Colombia. Alongside climate change, the continual expansion of industrial land use is the biggest driver of global species extinction, and it is provoking enormous social tension.

The DUH Feed Radar regularly investigates companies along the entire animal products supply chain in terms of their due diligence obligations relating to the use of feeds based on soy and palm oil. As well as looking at companies' targets, this year's Feed Radar has, for the first time, also examined the performance of companies in reaching their targets for using more sustainable and conversion-free feed. The report also focuses on the extent to which the requirements of the EU Regulation on Deforestation-free Products (EUDR), which comes into effect at the end of next year, have already been implemented.

Protein feedstuffs as a driver of deforestation – the case of soy



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Soy is one of the world's most important sources of protein. The soybean plant is easy to cultivate, is available at relatively low cost and has an extremely high protein content. Soy has all but relegated to insignificance the protein feedstuffs that used to be customary in Germany, such as field beans and peas. The vast majority of soy in Germany is used in animal feed in the form of meal, with more than 85 per cent of the crop being used as fodder for three groups of animals: poultry, pigs and dairy cattle.¹ Farmed salmon from aquaculture imported from Norway or Chile is also frequently fed with soy in feedstuffs.

In recent years, most of the deforestation risk associated with soy cultivation has originated in Brazil (around 74 per cent).² After cattle farming, soy cultivation is the biggest driver of forest destruction in South America. Latterly, the clearance of forests for soy production has shifted from the Amazon rainforest to other, less protected ecosystems, such as the Cerrado, a species-rich wooded savannah. Between January and May 2023, 353,200 hectares of this land were destroyed, the largest expanse in the last five years. Around 56 per cent of the soy that is imported into Germany now comes from the Cerrado. A study carried out by Deutsche Umwelthilfe (DUH) and Repórter Brasil in 2022 showed that soy cultivation has destroyed 4.2 million hectares of land in the Cerrado over the past two decades – an area larger than the entire Netherlands.³ As well as threatening biodiversity, continued land clearance also disrupts local water cycles, which is already reducing rainfall and further weakening the forests. Little by little, these ecosystems are losing their indispensable function as greenhouse gas sinks

- 1 https://www.duh.de/fileadmin/user_upload/download/Projektinformation/Naturschutz/Soja/Studie_Deutsche-Sojalieferkette_DUH-Profundo_200930.pdf
- 2 Trase (2022) Assessing tropical deforestation in Germany's agricultural commodity supply chains, Trase: Stockholm, Sweden
- 3 "Die Spur der Zerstörung durch Soja im brasilianischen Cerrado" [The trail of destruction caused by soy in the Brazilian Cerrado]: https://www.duh.de/fileadmin/user_upload/download/Projektinformation/Naturschutz/Soja/Gemeinsamer_Bericht_Zerst%C3%B6rung_durch_Soja.pdf

in the fight against climate change. The United States is another important supplier of soy to Germany. There, too, ecosystems are under threat and unsustainable practices are widespread.

Minor ingredient, major impact – animal feed made from palm oil

One of the main uses of palm oil in animal feed is as a binding agent. According to information provided by companies, the proportion of palm oil in the total volume of animal feed is very small (0.1%–2%). Nevertheless, feeding livestock in order to support Germany’s consumption of animal products still involves the use of a total of around 113,000 tonnes of non-certified palm oil in feed.⁴ This means that Germany’s animal feed and candle sectors are jointly responsible for the majority of its consumption of non-certified palm oil, and that the animal feed industry is one of the country’s largest consumers of palm oil overall.

Around 80 per cent of the palm oil in the feed sector is used in raising poultry for meat and eggs. Artificial calf milk, known as milk replacer, accounts for 10 per cent of the palm oil in feed, while pig feed accounts for 8 per cent. Around 2 per cent of the palm oil is fed to other livestock.⁵ Only around 25 per cent of the feed containing palm oil in Germany is certified as sustainable.⁶ The animal feed sector is therefore partly responsible for the fact that the German Federal Government’s target of sourcing 100 per cent of palm oil from deforestation-free supply chains by 2020 was missed by around 40 per cent.

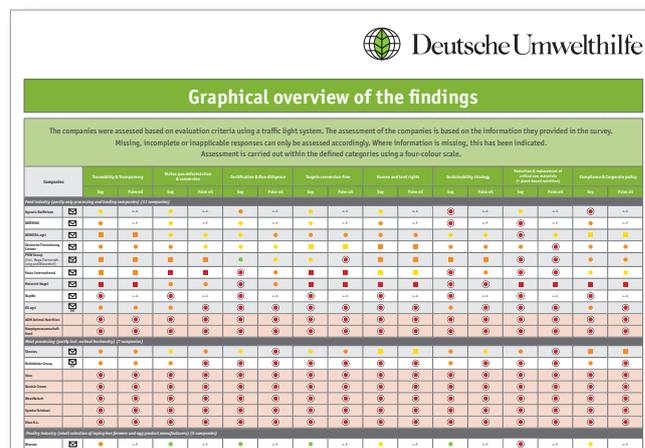
Summary of findings

Many of the 62 companies surveyed were generally willing to be transparent about their use of animal feed, as shown by the relatively high response rate of around 63 per cent. However, detailed information, such as the exact origin and the exact proportion of raw materials that are already sustainable, was often not shared. This may indicate that companies still lack adequate oversight of their supply chains. This impression is confirmed by the fact that the proportion of fully segregated supply chains remains low, particularly for soy. Sectors that are increasingly using non-GMO feeds, such as parts of the poultry and dairy industries, have a clear advantage here, because obtaining GMO-free certification has necessitated segregated commodity flows for many years.

The majority of companies do not yet meet the requirements of the EU Regulation on Deforestation-free Products (EUDR), which will come into effect at the end of 2024. The regulation calls for the complete physical separation of goods that comply with the standards from those that do not, as well as the traceability of

goods all the way back to the place where they were grown. Companies also need to make significant improvements in terms of the due diligence obligations prescribed by the EUDR, including the requirement to implement comprehensive risk assessment and risk avoidance systems.

Graphical overview of the findings



You can find the full table on the website: www.duh.de/fileadmin/user_upload/download/Projektinformation/Naturschutz/Entwaldung/Futtermittel Radar Tabelle 2023 Englisch 19 12 23.pdf

There has been an encouraging increase in the proportion of animal feed containing certified sustainable soy and palm oil in recent years. However, most companies rely solely on certification systems and industry initiatives to avoid deforestation or human rights risks. MRV (monitoring, reporting and verification) systems, engagement with suppliers and compliance structures are overlooked. Few industry players carry out full commodity mapping for soy and palm oil in their supply chains.

The increasing commitment to using feeds containing only conversion-free soy and palm oil, i.e. resolutely rejecting the conversion of any natural areas into agricultural land, is another positive step. Overall, however, reducing or replacing the use of soy and palm oil – two commodities linked to deforestation – continues to pose a challenge. The problem is particularly apparent where palm oil is concerned. Measures being pursued as a means of bringing about change mainly focus on ending the use of palm oil as a raw material. In the case of soy, efforts generally involve switching to varieties grown in Europe, but not reducing usage per se. No company in the downstream value chain is explicitly aiming to reduce the production and sale of animal products.

Leaders and laggards

The meat industry is especially non-transparent and, in general, seriously lagging behind. Only the Tönnies Group took part in our survey. To date, pork producers in particular appear to have only an inadequate overview of their supply chains. The sector is fully focused on an industry solution that will transfer the responsibility

4 https://www.giz.de/de/downloads/FONAP%20Palm%20C3%B6lstudie%202019_final.pdf
 5 https://www.giz.de/de/downloads/FONAP%20Palm%20C3%B6lstudie%202019_final.pdf
 6 https://www.giz.de/de/downloads/FONAP%20Palm%20C3%B6lstudie%202019_final.pdf

and measures for improving the situation to the farmers operating in the upstream finishing stage. The chain and mass catering sector and feed manufacturers are also trailing behind. Across all assessment categories, the dairy industry and the food retail trade are, on average, in the lead, albeit only with mediocre scores. This is doubtless due to several factors, such as market structure or the extent of value chain integration or the proportion of non-GMO feed used. Thanks to its position and market power in the value chain, food retail can therefore drive change and support the development of more sustainable supply chains.

Other factors that are inhibiting progress include global corporate structures with correspondingly slow decision-making processes and differing levels of brand awareness. Where companies were not yet the focus of civil society's campaigning efforts, this too had a noticeable effect.

Conversion-free cultivation and its importance for biodiversity and the climate – how are industries performing?

One prerequisite of a sustainable value chain is that it must not involve the conversion of land for the production of raw materials, i.e. the destruction of important ecosystems. The EU Regulation on Deforestation-free Products has so far only stipulated evidence of zero deforestation in the legal standard. However, being conversion-free is no less important. While fewer and fewer forests are being converted, especially linked to Germany's consumption of soy-based feed, there is an increase in the conversion of other ecosystems, such as scrubland – and the trend is rapidly accelerating. This development is affecting relevant parts of the Cerrado dry savannah in Brazil, for example. For this reason, companies were asked about the extent to which they already take conversion-free cultivation into account in their sustainability efforts, and what their future targets are. The poor level of response indicates that the topic of conversion-free cultivation is not yet on the agenda for many. Those companies that are aware of the importance of this approach now only need to take relatively small steps to achieve it. This is obviously easier where soy is concerned, as it is possible to switch to European products with corresponding certifications or standards. Conversion-free palm oil is given even less attention. Compared with other sectors, the food retail trade often already takes conversion-free cultivation into consideration in its change processes.

Building transparency and using certifications

Many of the companies surveyed still find increasing their transparency challenging, particularly in the case of palm oil. Commodity mapping and reviewing physically separated supply chains are key means of driving improvements, but organic and other standards, the labelling of GMO-free products by organisations like the German Association for Food without Genetic Engineering (VLOG) and focusing on European countries of origin also have an impact. In terms of its supply chain model, the majority of soy is sourced in

accordance with the mass balance concept. However, a role also continues to be played by the weakest supply chain model, book & claim, in which only certificates (credits) are traded.

To date, certification has been the main route to greater sustainability as far as many businesses are concerned. However, there is still a lack of transparency when it comes to the proportion of certified goods as a percentage of the total volume. The responses available for analysis paint a mixed picture, with the proportion of certified inputs varying considerably. Large parts of the poultry and dairy industries are committed to purchasing GMO-free feed and generally favour certificates that also cover other sustainability considerations such as conversion-free cultivation. As a result, the proportion of certified goods is particularly high in these sectors. So far, only a small proportion of the pork product group has been certified, with the exception of individual company programmes. Encouragingly, the use of standards is, for the most part, focused on gold standards – but still primarily based on mass-balanced goods.

On the whole, consumers are given virtually no information at the point of sale about the origin and sustainability of the feed used to produce the final animal-based product.



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Alternative raw materials and vegetarian/vegan options

When it comes to their sustainability efforts in relation to soy and palm oil, the retail and wholesale sector and the chain and mass catering sector primarily focus on vegetarian and vegan products. Such products are usually available to at least some extent, and some companies are working to expand the range. In individual cases, soy is being replaced by certified products from Europe or work is underway on projects designed to make the protein components of feed more sustainable. The other sectors stand out for their silence or lack of and insufficient action in this regard. Where measures are taken, these primarily involve replacing soy with European alternatives and certified GMO-free products. In the case

of palm oil, the few companies that are looking for ways to improve sustainability have opted to replace the raw material. Switching away from and reducing the consumption of high-risk ingredients has become an important topic for feed producers. Agravis, for example, claims to have replaced 40 per cent of its soybean meal. In addition, some – albeit limited – research and work are being done in the industry aimed at reducing the quantity of high-risk components in animal feed.

Compliance and corporate policy

The German Supply Chain Due Diligence Act (LkSG), which became applicable at the beginning of the year, appears to be having an impact. Corporate guidelines and measures to ensure compliance with the regulations are in place at most companies – with a few exceptions. The majority of affected businesses are carrying out the mandatory risk analyses and laying down basic procurement guidelines. Some have gone beyond the legal requirements and are in close contact with suppliers or have incentive programmes and comprehensive guidelines or policies. Certain individual companies also report on the measures they are taking (e.g. via the Carbon Disclosure Project (CDP), their own websites or WWF programmes). These reports also compare the results achieved so far with company objectives. However, it is still important to check implementation, and this is mainly done by means of audits. There is a danger here that comprehensive and sufficient measures are not being taken to prevent the existing risk of human rights violations in supply chains. In the event of breaches of the agreements, most companies rely on dialogue with suppliers. However, only a few have made provisions for terminating business relationships as the highest level of escalation.

Background: the problem

For a long time, there were no legally binding regulations governing impacts on the environment and human rights in the supply chains of European companies. Although many companies have made voluntary commitments in recent years, the pressure on ecosystems has continued to increase. Violations of human rights and land rights are still being recorded. Positive measures have so far been limited to just a small share of the market. Pioneers are therefore often at a competitive disadvantage.



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The limited benefits of certification

The majority of companies rely almost entirely on certification systems. Although certificates do play an important role in the development of standards, transparency and information gathering, for example, they cannot replace carrying out independent due diligence obligations and interacting with suppliers.

Many certification systems have serious shortcomings, particularly in terms of segregated traceability and assuring and guaranteeing standards. Evidence of violations by certified companies also keeps coming to light. Independent standards managed by multiple interest groups generally perform better than corporate systems.⁷ However, even sustainability standards with ambitious requirements that go far beyond minimum standards often only have a limited effect on cultivation practices in the producing countries. Certification systems primarily recognise companies that have always produced sustainably. They are also relatively expensive, which means that their share of the overall market often remains very small. This has the result that, for example, around 20 per cent of global palm oil production is certified, compared with just 2.5 per cent in the case of soy. The certification systems therefore often only cover a niche market that is prepared to pay more for sustainability.

Furthermore, supply chain models based on book & claim (mere certificate trading) or mass balance are still widespread. These models do not allow for traceability of the flow of goods or, in turn, for transparency with regard to the areas under cultivation and the associated environmental and human rights risks posed by the respective raw materials. In addition, products that comply with the standards can be mixed with products that do not. The incentive to extend the use of sustainable cultivation methods thus remains very limited overall. Producers can choose to sell their goods in markets with strict or lenient requirements, depending on whether or not they meet the standards.

Company-level strategies should therefore, on top of fulfilling their own responsibilities, always include engaging with suppliers and support them in fulfilling their requirements. As well as ensuring that individual supply chains are sustainable and conversion-free, this will also compel all suppliers to optimise their entire operations for sustainability. This is the only way to achieve systemic change on the ground.

Industry agreements should take these points into account and, instead of relying solely on certification schemes, they should also support appropriate MRV systems that help suppliers improve their sustainability practices and transformation processes and, where possible, build long-term relationships with partners.

⁷ <https://www.wwf.de/fileadmin/fm-wwf/Publikationen-PDF/Amazonas/Setting-the-new-Bar-for-Conversion-free-Soy-in-Europe.pdf>

Animal feed posing a high risk of environmental destruction and human rights violations continues to reach the German market

Large quantities of animal feed containing unsustainable palm oil and soy are still finding their way onto the European market. While 90 per cent of the palm oil used in food for humans is already sourced from sustainability-certified cultivation, only 25 per cent of the palm oil in animal feed is sustainable.⁸

There is an encouraging trend towards higher proportions of certified deforestation- and conversion-free products in soy-based animal feed. According to the IDH European Soy Monitor, 63 per cent of the soy consumed in Germany is now certified under certification systems that prohibit deforestation and conversion. This marks a significant increase.⁹ In 2020, the figure was just 38 per cent. However, there is room for criticism in that some of these certificates still accept book & claim, and not all systems accepted by IDH perform well in areas such as compliance with the rules and credibility.

Meanwhile, German supermarkets and restaurants are still selling meat, dairy products and eggs that have contributed to the destruction of forests or land grabbing. A recent study by Trase and ICV found that at least 16 per cent of the soy production in the Amazon or Cerrado is not compliant with Brazil's Forest Code.¹⁰ There is evidence to suggest that Brazilian laws have been violated in more than 70 per cent of cases. Ensuring compliance with the laws of the countries where the products in their supply chains are grown thus remains an enormous challenge for companies.

New legal framework based on supply chain legislation and the EU Regulation on Deforestation-free Products

In response to the enormous threat that European supply chains continue to pose to human rights and global ecosystems, several legislative projects have been initiated in the EU and Germany with the aim of regulating European supply chains. The German Supply Chain Due Diligence Act (LkSG), which came into force on 1 January 2023, was the first piece of legislation to lay down due diligence obligations relating to human rights and a small number of environmental issues. Work on the Corporate Sustainability Due Diligence Directive (CSDDD) is currently underway at EU level. Once this has been approved, the German law will have to be adjusted to meet the EU requirements.

The historically significant EU Regulation on Deforestation-free Products (EUDR) came into force in June 2023 and will become effective from the end of 2024. Under this regulation, companies trading in beef, cocoa, coffee, palm oil, rubber, soy and timber must prove that their products do not originate from forested land or areas with degraded forests that have been cut down or degraded after 31 December 2020. If they fail to do so, they face the threat of fines, blacklisting and other penalties.¹¹ Companies must also produce due diligence reports demonstrating that they have introduced appropriate measures to verify the origin of their products and that they are compliant with the applicable laws and regulations of the producing countries. The EUDR also stipulates separate (segregated) traceability to the plot of land under cultivation. This means that it must be clear which area



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8 <https://www.bmel.de/EN/topics/food-and-nutrition/sustainable-consumption/sustainable-palm-oil-fonap.html>

9 European Soy Monitor 2021 <https://www.idhsustainabletrade.com/uploads/2023/09/IDH-Soy-Monitor-2021-Final.pdf>

10 <https://resources.trase.earth/documents/Briefings/soy-and-legal-compliance-in-brazil-report.pdf>

11 <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:32023R1115>

of land each product comes from. As a result, it will be possible to clearly assign any environmental destruction and violations of local laws to a supply chain and the corresponding companies. This is a milestone on the road to transparent supply chains. Products resulting from deforestation and EUDR-compliant goods may not be mixed. Segregated supply chains will be mandatory.

As a result, the EUDR is establishing binding minimum standards for access to the EU market. In growing regions that export relatively little to the EU, the desired pull effect towards more sustainable cultivation systems could fail to materialise. It is therefore all the more important that companies set up appropriate MRV systems and interact with suppliers.

Protection of scrubland and other ecosystems falls short

The EUDR may be the first forestry law of its kind in the world, but its impact has already been felt in the United States, for example, where a similar law is being drafted. However, a problem exists in that the new EUDR has based its definition of “forests” solely on that of the FAO (Food and Agriculture Organization of the United Nations), which requires a certain crown density and tree height. The EUDR’s definition of deforestation as “the conversion of forest to agricultural use” does not cover “other wooded land”, such as scrubland, the category into which the Cerrado falls.¹²

There is provision in the text for the EUDR to be evaluated after a year of being in force in order to examine the extent to which the scope of the regulation could be extended to scrubland like the Cerrado. Until such time as these areas are included in the EUDR, the regulation could have the unintentional effect of transferring the expansion of land in agricultural use from “forests” to other important natural ecosystems. Indeed, this process has already been observed in the displacement of land under soy cultivation from the Amazon to the Cerrado – the latter being the leading country of origin for exports into the German market.

It is therefore important that companies switch their entire supply chains to conversion-free animal feed so that no ecosystems are converted. Most certification systems are already trying to make sure that this happens, which is why the step from deforestation-free to conversion-free is relatively small.

Methodology

In this market report, Deutsche Umwelthilfe (DUH) investigated companies from six sectors of the economy that have animal products and therefore animal feed containing soy and palm oil in their supply chains.

For the purposes of carrying out the survey, 62 companies were contacted between July and September 2023. In this case, they were asked to complete an online questionnaire about the use of soy, palm oil (and maize) in their supply chains. Of the 62 companies contacted, 37 took part in the survey or were represented by the German Animal Feed Association (DVT).

The companies surveyed were selected by DUH on the basis of **research into relevant market participants**. No claim is made that the selection of companies in the Feed Radar is exhaustive, and it will be supplemented by further companies in the future if required.

The survey focused on animal products and products for human consumption. **Pet food** was not explicitly considered.

The companies surveyed come from six sectors of the economy:

- » **Feed industry:** importers or producers of single-ingredient and compound feeds
- » **Meat industry:** companies that distribute their own brands and produce private labels for retail and wholesale (especially broiler chickens, pigs and cattle)
- » **Dairy industry:** co-operative dairies, dairy farming and brand manufacturers
- » **Poultry farming for egg production** and manufacturers of egg products
- » **Food retail and wholesale**
- » **Chain and mass catering sector:** fast food chains and fast food restaurants

The survey asked the companies about their objectives, the quality of the standards, the enforcement mechanisms and progress made in terms of implementation. The Feed Radar used selected criteria to assess whether corporate due diligence obligations are being adequately fulfilled.

The companies were assessed based on **evaluation criteria using a traffic light system. The assessment of the companies is based on the information they provided in the survey.** Missing, incomplete or inapplicable responses can only be assessed accordingly. Where information is missing, this has been indicated. Assessment is carried out within the defined categories using a four-colour scale.

¹² https://www.mightyearth.org/wp-content/uploads/RF_OWL_briefing_0923_higherQ.pdf

Conclusions and recommendations

Recommendations for companies

- » Adopt a supply chain policy that prohibits the conversion of natural ecosystems and human rights violations in relation to animal feed in your supply chains and also ensures that production is sustainable.
- » Publish time-restricted action plans detailing how you will achieve your targets.
- » Align your policies with the guidelines set out by bodies such as the Accountability Framework Initiative (AFI).
- » Establish an MRV system to regularly review and communicate your exposure to risks such as ecosystem conversion. Be transparent about what actions have been taken and what progress has been made.
- » Ensure that animal feed is not sourced from farms (including indirect suppliers) that have converted ecosystems or encroached on the territories of Indigenous or traditional communities, on public lands or on nationally protected areas after a certain cut-off date.
- » Support your suppliers to achieve a transformation towards sustainable feed production. Foster long-term partnerships.
- » Insist that your suppliers make voluntary public commitments to ensuring all of their production operations, including those of their sub-suppliers, are free from deforestation, the destruction of ecosystems and human rights violations.
- » Use exacting certification systems. Only use certification systems that benchmark studies show to be highly effective in relation to the protection of ecosystems and biodiversity, good agricultural practices and social criteria, and that score highly in terms of traceability and assuring standards.¹³
- » Take prompt action to ensure that flows of goods are segregated to guarantee the compliance of your standards.
- » Set a binding cut-off date for deforestation and ecosystem conversion that is no later than 1 January 2020.
- » Lay down binding standards for sustainable cultivation and the protection of ecosystems for all regions of origin. For example, prohibit the conversion of precious natural ecosystems like wetlands.
- » Encourage initiatives aimed at replacing animal feed products with locally and sustainably grown fodder crops. Support alternative livestock feeding concepts.
- » Collaborate with initiatives to publicly campaign for a legal framework against imported deforestation at national and European level.
- » Ensure transparency. Publish transparent reports on your progress annually. Build transparency about not only the origin but also the deforestation and conversion risks posed by the soy and palm oil you use and the producers involved.
- » Promote plant-based alternatives to foods of animal origin.

¹³ <https://www.wwf.de/fileadmin/fm-wwf/Publikationen-PDF/Amazonas/Setting-the-new-Bar-for-Conversion-free-Soy-in-Europe.pdf>

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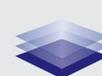
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