

WITH FUNDING FROM
 AUSTRIAN
DEVELOPMENT
COOPERATION



DONAU SOJA

**Civil Dialogue Group "Arable Crops"
Brussels, 6 February**

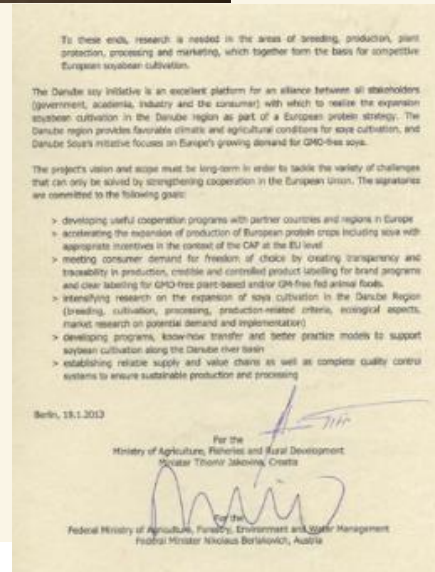
Donau Soja is...

- An independent member-based organization
- Fully democratic and transparent
- Supported by 20 governments in Europe
- A truly European organization working for the benefit of all
- Based in Vienna – where the soy bean first arrived in Europe
- Members in 22 countries
- Not-for-profit (recognized as such by the Austrian Government)
- Interprofessional: plant breeding, farming, processing, food and feed production, distribution, retail and civil society



Agrarhandel Hoffmann GmbH | Agricultural Research & Development station Turda | Agronova Ltd. | Anzengruber Josef | Auf der Landwehr GmbH | Beinhundner Klaus | Bokelmann GbR | Bonafarm Group | Conviva Group GmbH | Durlacher GmbH | Enengel Franz | EWROL Sp.z.o.o. | Geflügelhof Teichweiden Gesellschaft für Gesunde Tierrernährung (GGT) | Geflügelhof Wirtz | Global Seed | Gnaser Frischeisproduktions GmbH | Grain & Feed Chamber | Hölzl Franz | Hubert Haager Neumühle | Intergrain S.A./ Sodrvestro Group of companies ITC Agrar GmbH | Kammerberger Alfred e.U. | Lambrecht Josef | MagGrow Agricultural Magnetics | Manufaba | MCS Vagohid Zrt. | Metz Rosmarie | Mitterer GmbH | my lab International GmbH | MTÜ Eesti Sojalit | Oleificio San Giorgio | Oriental Lotus Food Trade and Investment GmbH | Saatztucht Gleisdorf GmbH | Sandmayr Alfred | SC Agro Iulia SRL | SC Agrotinave SRL | SC Orgapic SRL | SC Transapicola | Schrrall GesnBR | Schubert Andrea | SOFAMA | Synthesis Agro Kosalting | Tatschl Produktions GmbH | Ukrainian Association of Producers and Processors of Soy | Zemedelske Druzstvo Vsestary

POLITICAL SUPPORT: DONAU SOJA DECLARATION



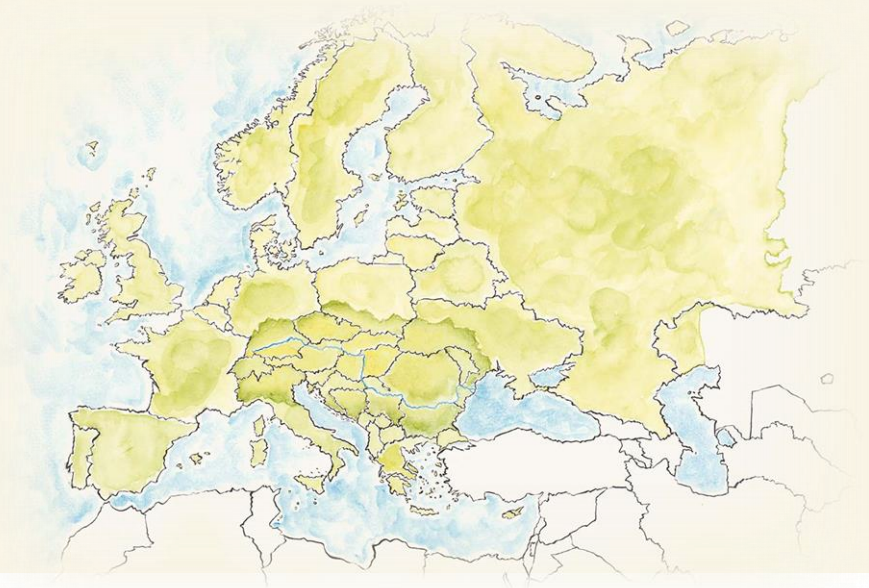
EUROPE SOYA DECLARATION



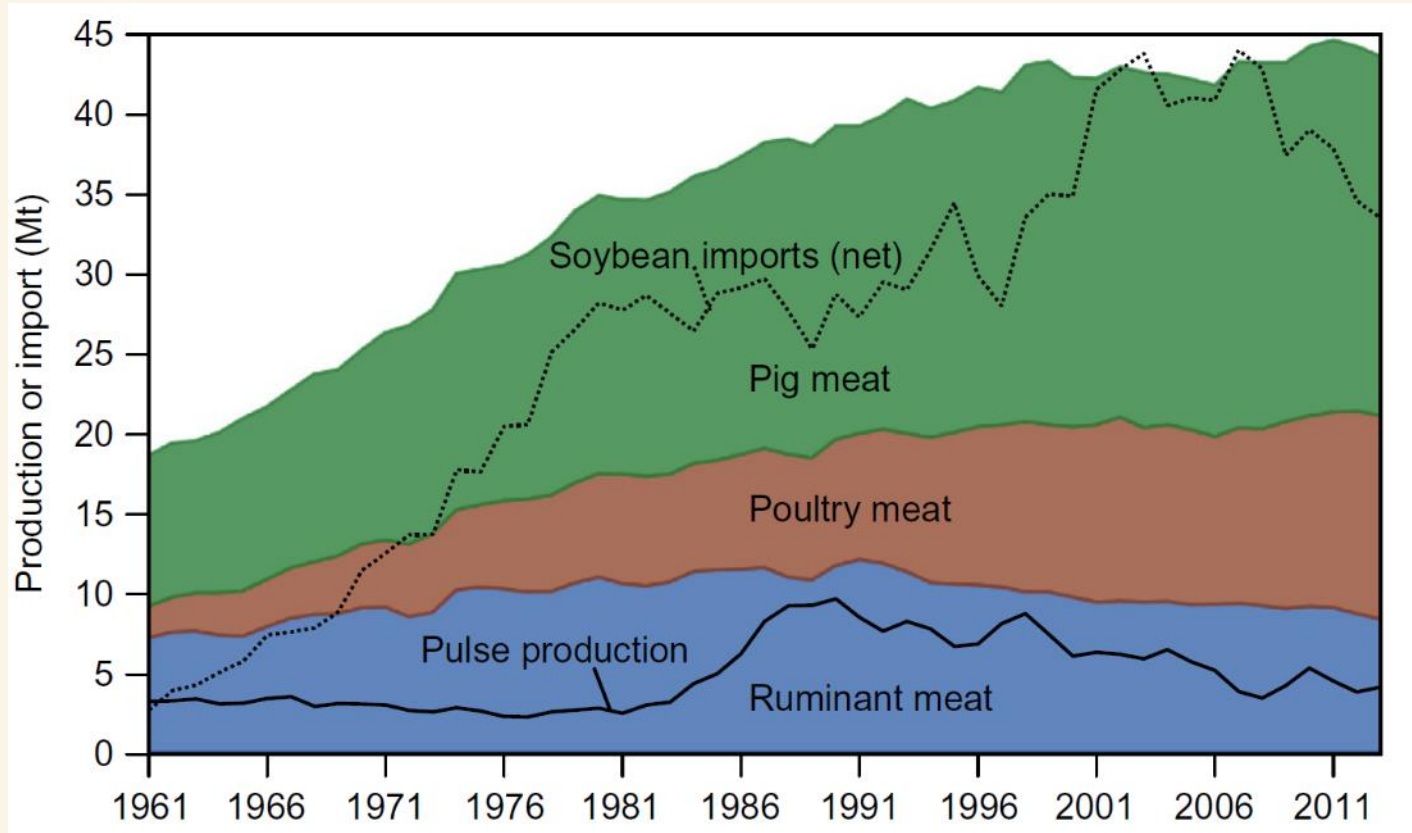
- Draft was aligned with Hungary, Austria and Germany
- Declaration was signed by 14 Agriculture Ministers in July 2017 in Brussels
- Declaration was signed by 4 more countries in January 2018 in Berlin



WHY WORK WITH SOY IN EUROPE?



EUROPEAN PROTEIN SUPPLY



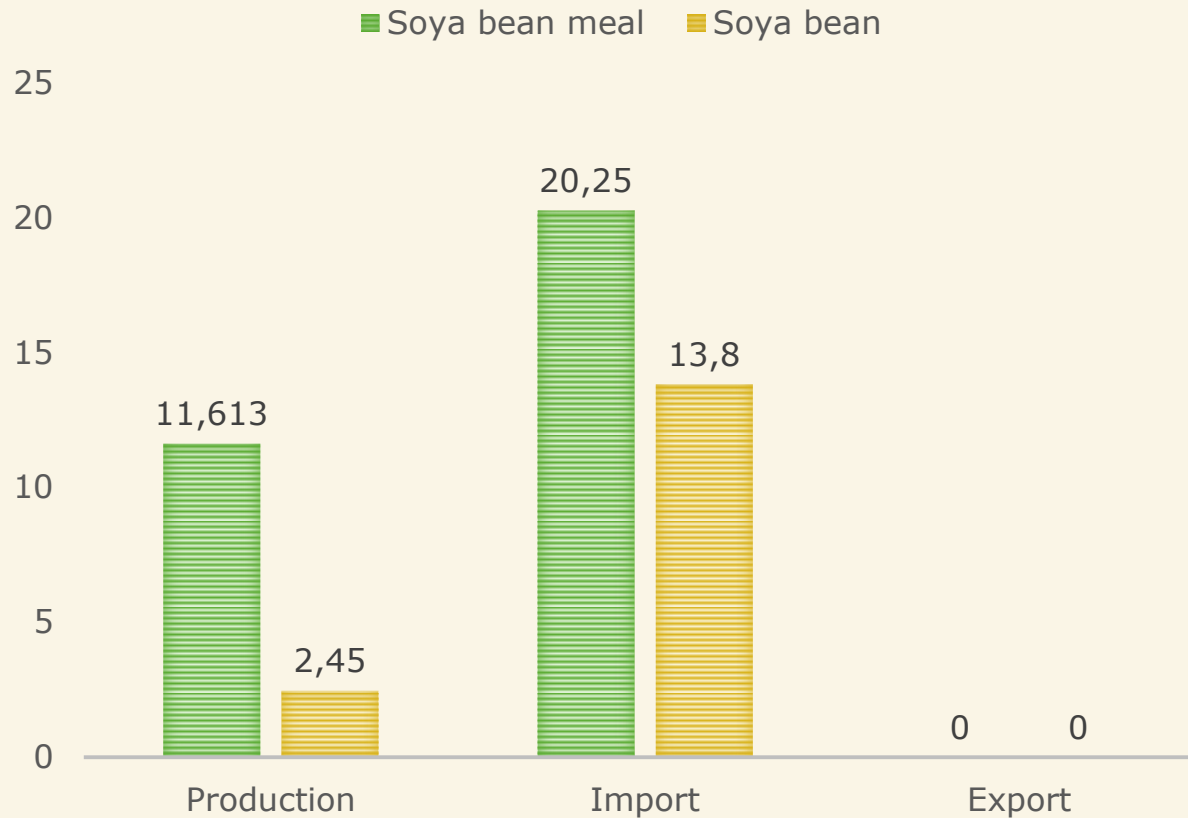
SOYBEAN SUPPLY IN EU-28



16 **MILLION**
HECTARES

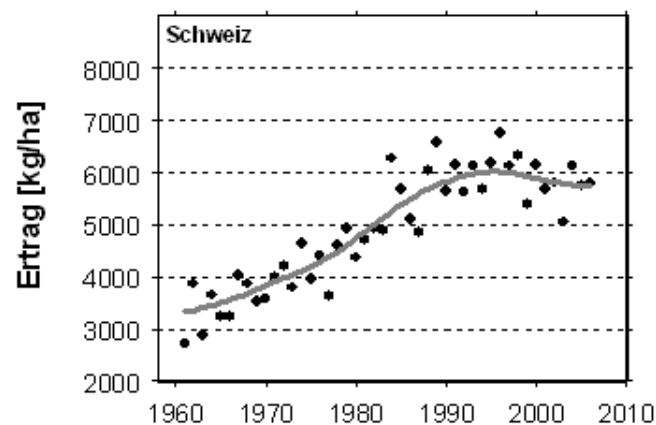
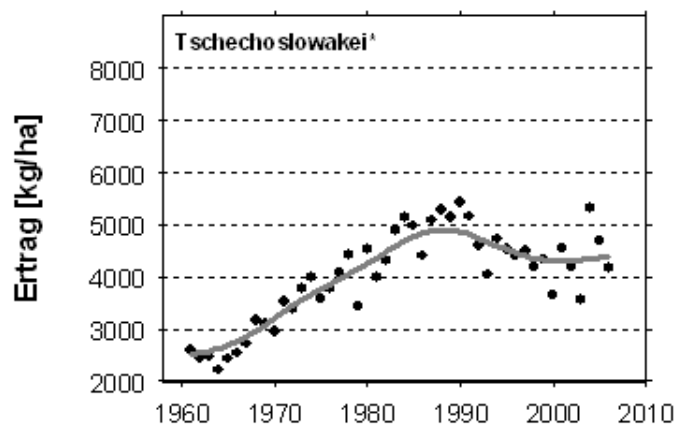
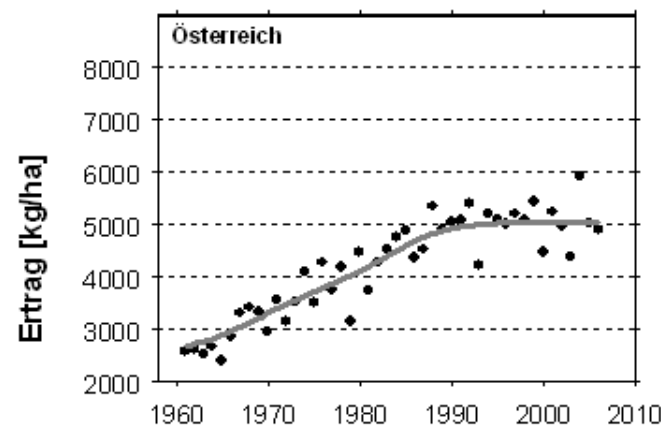
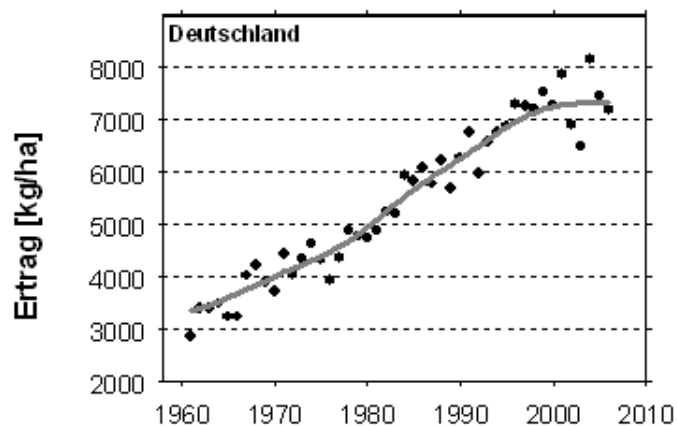
IN NORTH & SOUTH AMERICA ARE
DEDICATED TO SOYA BEANS THAT
ARE EXPORTED TO EUROPE

SOYBEAN SUPPLY IN EU-28



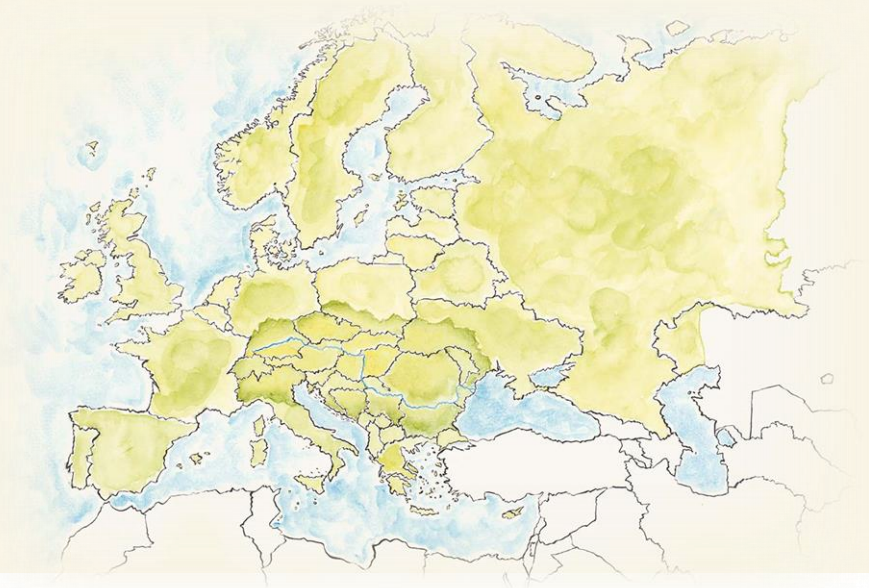


WHEAT YIELDS IN CENTRAL EU



Eitzinger, Kersebaum, Formayer 2009, Landwirtschaft im Klimawandel

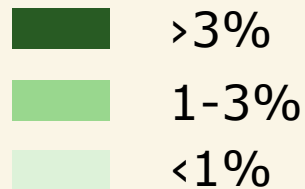
IS SOY BEAN FROM EUROPE READY TO BE A CHANGEMAKER?



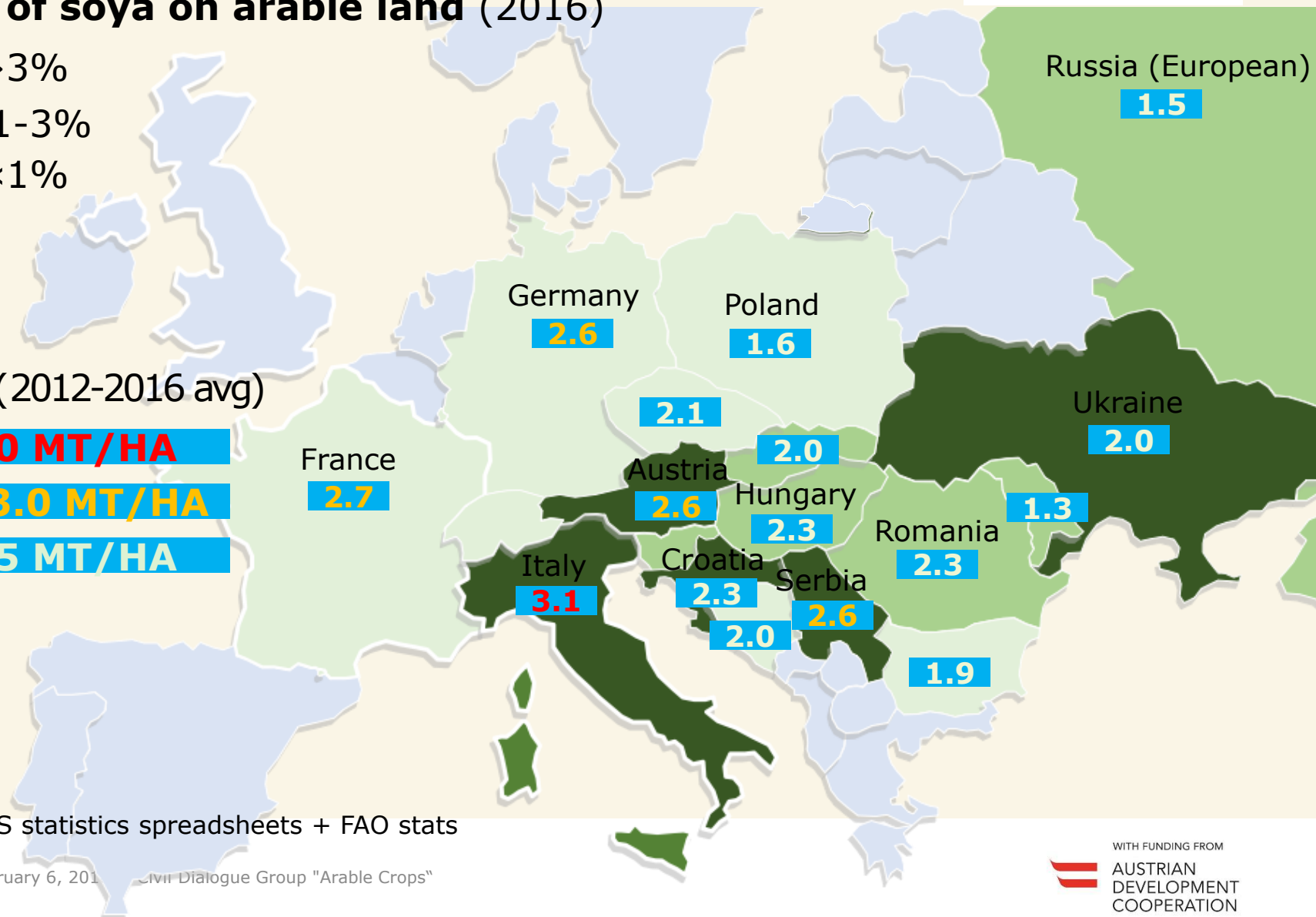
SOY PRODUCTION IN EUROPE



Share of soya on arable land (2016)



Yield (2012-2016 avg)



Source: DS statistics spreadsheets + FAO stats

SOY BEAN MILLS IN EUROPE



Soya oil mills in Europe

Oil mills with ES/DS certification:

1. ADM, Straubing (DE) - ES
2. BAG, Güssing (AT) - DS
3. Bioprotein (RS) - DS
4. Cereal Docks, Camisano (IT) - ES+DS
5. Oleificio, San Giorgio (IT) - ES
6. Vandamme, Kormárom (HU) - DS
7. Victoria Group, Becej (RS) - DS

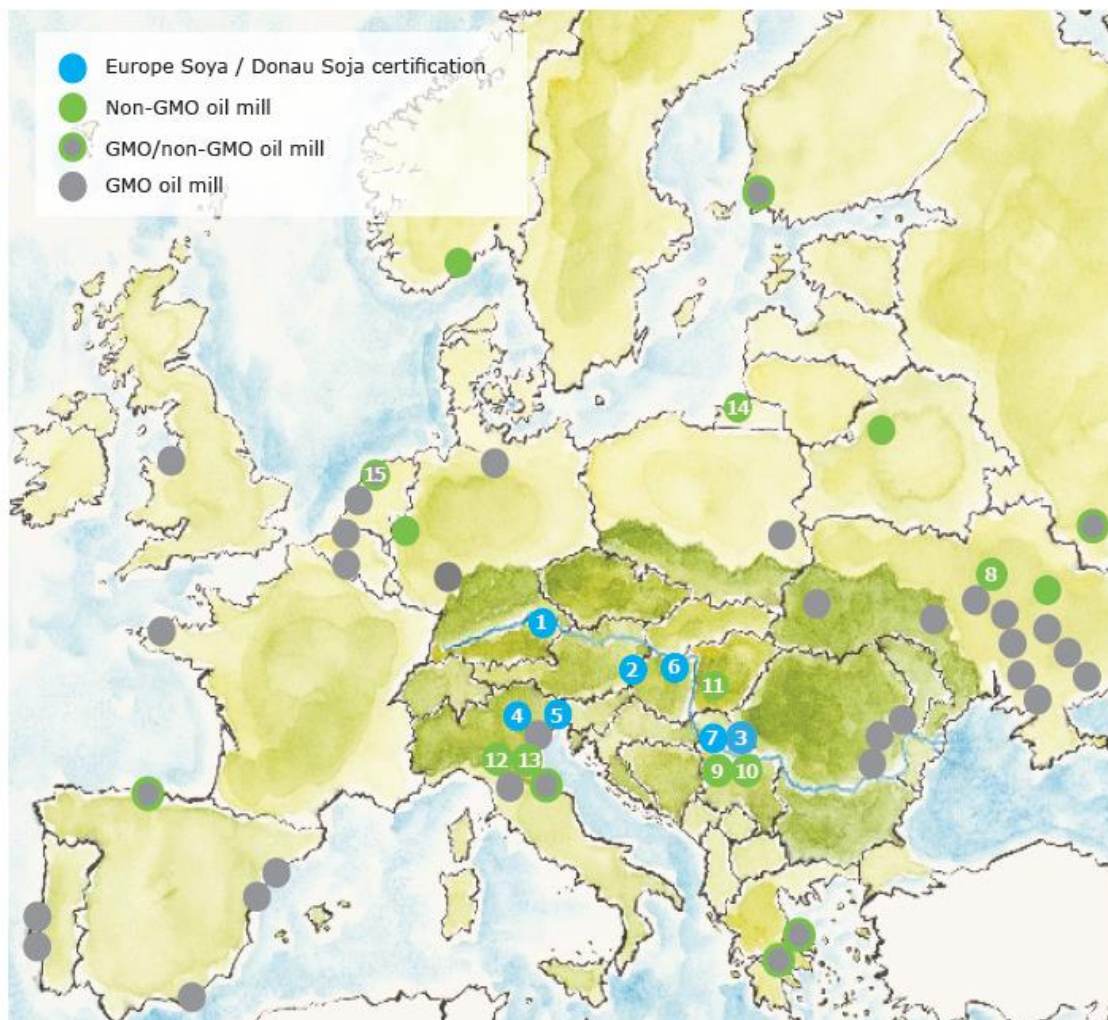
Non-GMO soya oil mills:

8. ATK, Kyiv (UA)*
9. Bimal, Becej (RS)*
10. Dijamant, Zrenjanin (RS)**
11. Glencore, Foktő (HU)**
12. Ital Green Oil, San Pietro (IT)*
13. Rossetto C., Anzergrande (IT)*
14. Sodrugestvo, Kaliningrad (RU)*

ADM, Spyck (DE)
Astarta-Kyiv, Globino (UA)
Denofa, Fredrikstad (NO)
Sodrugestvo, Smorgon (BY)

GMO/non-GMO soya oil mills:

15. Bunge, Amsterdam (NL)**
- Binge, Bilbao (ES)
- Bunge, Ravenna (IT)
- EFKO, Belgorod (RU)
- Nordic Soya, Uusikaupunki (FI)
- Soya Hellas, Psachna (EL)
- Soya Mills, Kalamaki (EL)



GMO soya oil mills:

ADM, Europoort (NL)
ADM, Mainz (DE)
ADM, Hamburg (DE)
Bunge, Brest (FR)
Bunge, Barcelona (SP)
Bunge, Cartegana (SP)
Bunge, Lehilu (RO)
Cargill, Liverpool (UK)
Cargill, Antwerp (BE)
Cargill, Ghent (BE)
Cargill, Barcelona (SP)
Cereal, Venezia (IT)
Company S., Zaporizhzhia (UA)
Expur, Slobozia (RO)
Glencore, Bodarczów (PL)
Greenstone Co., Kirovograd (UA)
Iberol, Lisbon (PT)
Italcol, Castelfiorentino (IT)
Kakhovka P. A., N. Kakhovka (UA)
Kyiv-Atlantic G., Myronivka (UA)
MHP, Katerynopil (UA)
MHP, Tavrliisk (UA)
Oliyar, village Stavchany (UA)
Pology OEP, Pology (UA)
PromTechA..., Vysokogirne (UA)
Prutul, Galati (RO)
Sovena, Lisbon (PT)
Thegra Ukraine, Gaysin (UA)

* in ES/DS certification process

** ES/DS certification is under discussion

SOY PRODUCERS IN EU



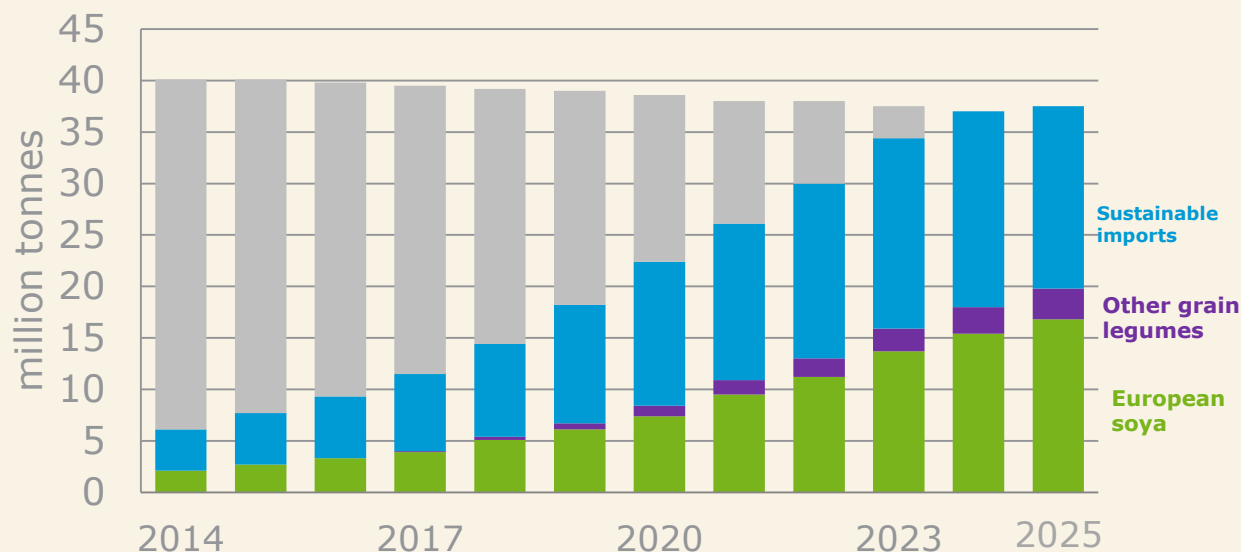
Soybean area by country in Europe (2011-2017)

HA	2011	2012	2013	2014	2015	2016	2017	y/y change	
Austria	38 120	37 100	42 000	43 830	56 867	49 819	64 396	+ 14 577	+ 29.3%
Bosnia Herzegovina	4 050	4 900	4 500	4 800	7 368	6 965	7 500	+ 535	+ 7.7%
Bulgaria	590	1 800	300	300	34 470	14 525	11 200	- 3 325	- 22.9%
Croatia	58 900	42 000	47 156	47 100	88 867	78 614	90 000	+ 11 386	+ 14.5%
Czech Republic	7 580	5 700	6 500	7 200	12 310	10 608	15 344	+ 4 736	+ 44.6%
Germany	5 000	5 000	5 200	10 000	17 500	16 000	19 100	+ 3 100	+ 19.4%
Hungary	41 010	40 900	42 300	42 500	72 580	61 282	74 500	+ 13 218	+ 21.6%
Italy	165 960	175 000	220 000	281 000	330 000	320 000	350 000	+ 30 000	+ 9.4%
Moldova	57 662	56 900	39 400	52 800	66 000	34 615	36 500	+ 1 885	+ 5.4%
Poland	200	1 928	6 500	19 000	24 000	12 000	16 000	+ 4 000	+ 33.3%
Romania	72 060	77 900	67 400	79 500	165 000	160 000	192 000	+ 32 000	+ 20.0%
Serbia	165 250	163 000	159 724	180 000	201 470	186 000	230 000	+ 44 000	+ 23.7%
Slovakia	19 700	21 900	29 200	33 400	43 370	35 000	40 000	+ 5 000	+ 14.3%
Slovenia	110	100	100	300	1 710	2 000	2 000	-	-
Switzerland	1 123	1 085	1 407	1 496	1 719	1 777	1 770	- 7	- 0.4%
DS Ukraine	306 700	377 493	409 901	550 212	732 219	638 062	686 348	+ 48 286	+ 7.6%
Total DS Region	944 015	1 012 706	1 081 588	1 353 438	1 855 450	1 627 267	1 836 658	+ 209 391	+ 12.9%
Non-DS Ukraine	803 600	1 034 507	956 099	1 156 788	1 390 781	1 211 938	1 303 652	+ 91 714	+ 7.6%
Total Ukraine	1 110 300	1 412 000	1 366 000	1 707 000	2 123 000	1 850 000	1 990 000	+ 140 000	+ 7.6%
France	41 570	37 500	43 000	74 600	122 000	137 000	142 000	+ 5 000	+ 3.6%
Russia (European part)	403 000	512 000	570 000	844 000	838 000	916 000	1 123 000	+ 207 000	+ 22.6%
Others	1 630	3 180	2 140	3 980	5 900	4 790	5 140	+ 350	+ 7.3%
Total Non-DS Europe	1 249 800	1 587 187	1 571 239	2 079 368	2 356 681	2 269 728	2 573 792	+ 304 064	+ 13.4%
Total EU-28	452 430	450 008	511 796	642 710	974 574	901 638	1 021 680	+ 120 042	+ 13.3%
Total Europe	2 193 815	2 599 893	2 652 827	3 432 806	4 212 131	3 896 995	4 410 450	+ 513 455	+ 13.2%

OUR GOAL



Sourcing protein (soya) feed demand in Europe until 2025 – our goal is to increase our market share in European Soya production



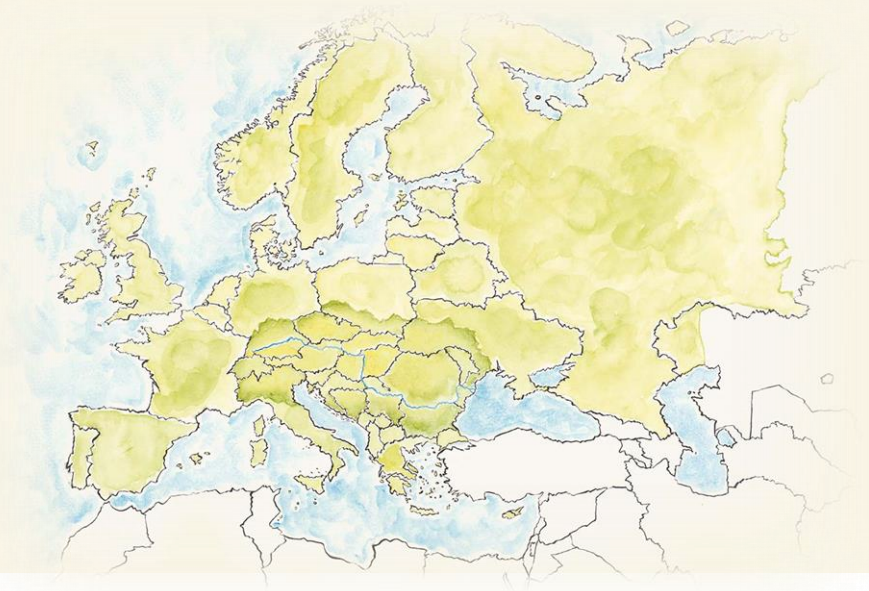
by 2025

- all soya demand could be satisfied with certified soybeans
- half of soya demand will be covered by non-GM European production

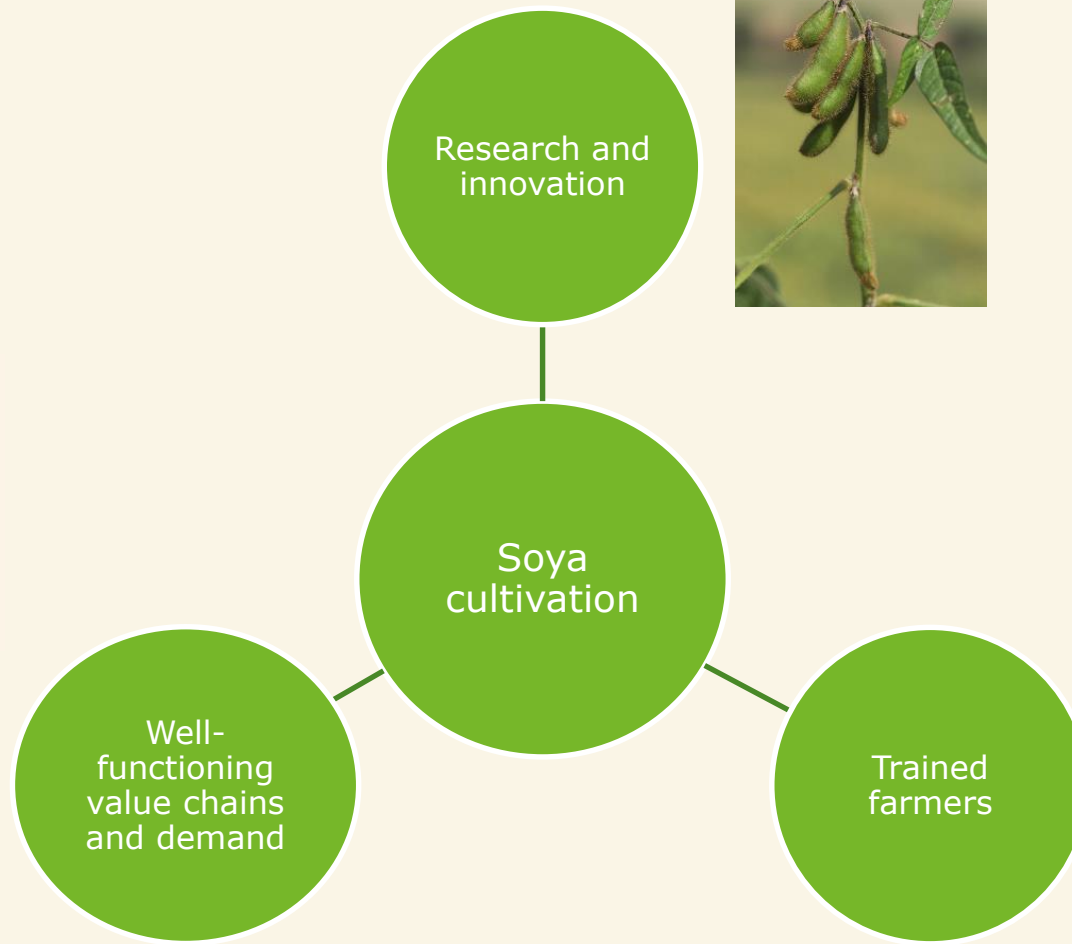


No big expansion in agricultural land use, no reduction in production of other crops:
share of soya bean in total arable land goes up from 2 % to 5 % in Europe (1/3 of maize)

OUR WORK TO THIS VISION



A CROP DEVELOPMENT PROGRAMME BASED ON THREE PILLARS



DONAU SOJA / EUROPE SOYA IS ...



*ORIGIN-
CONTROLLED*



NON-GM



*REDUCED USE OF
PESTICIDES*



*IN COMPLIANCE WITH
LABOUR & HUMAN RIGHTS*

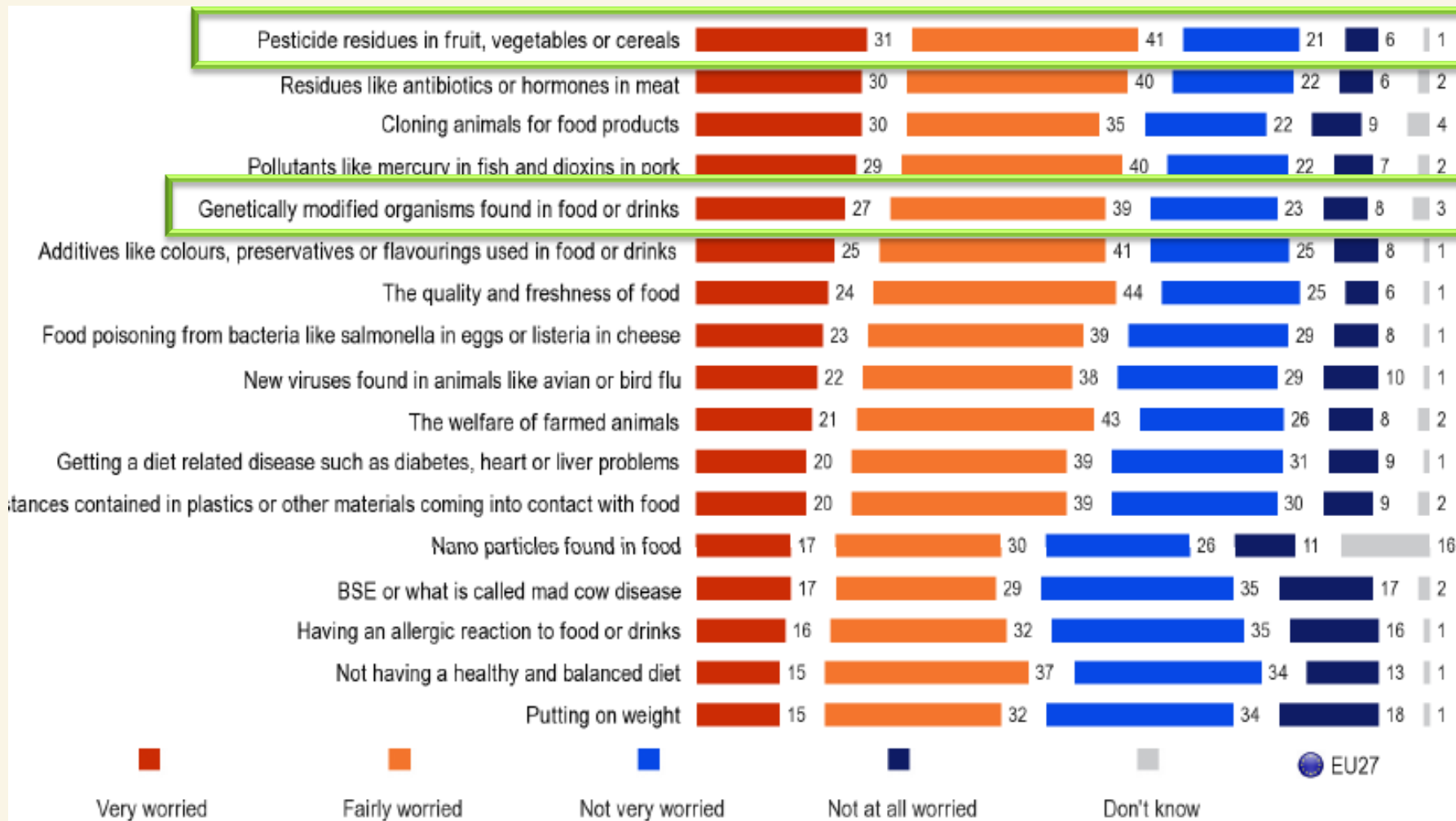


*NO DEVELOPMENT OF NEW
AGRICULTURAL LAND*

WHAT ARE CONSUMERS LOOKING FOR?



Eurobarometer



FIELD DEMONSTRATIONS & TRAININGS FOR PRODUCERS



SOY IN EUROPE...



...strengthens the east to west integration and development



- New trade relationships
- Strengthening of European companies
- Strengthens the 'European project'
- Investments in processing, storage and transport
- Investments in seed and cultivation
- European cutting-edge research and genetics
- Jobs in structurally weak regions
- Diversification of cropping
- Establishment of uniform guidelines for non-GMO production in Europe

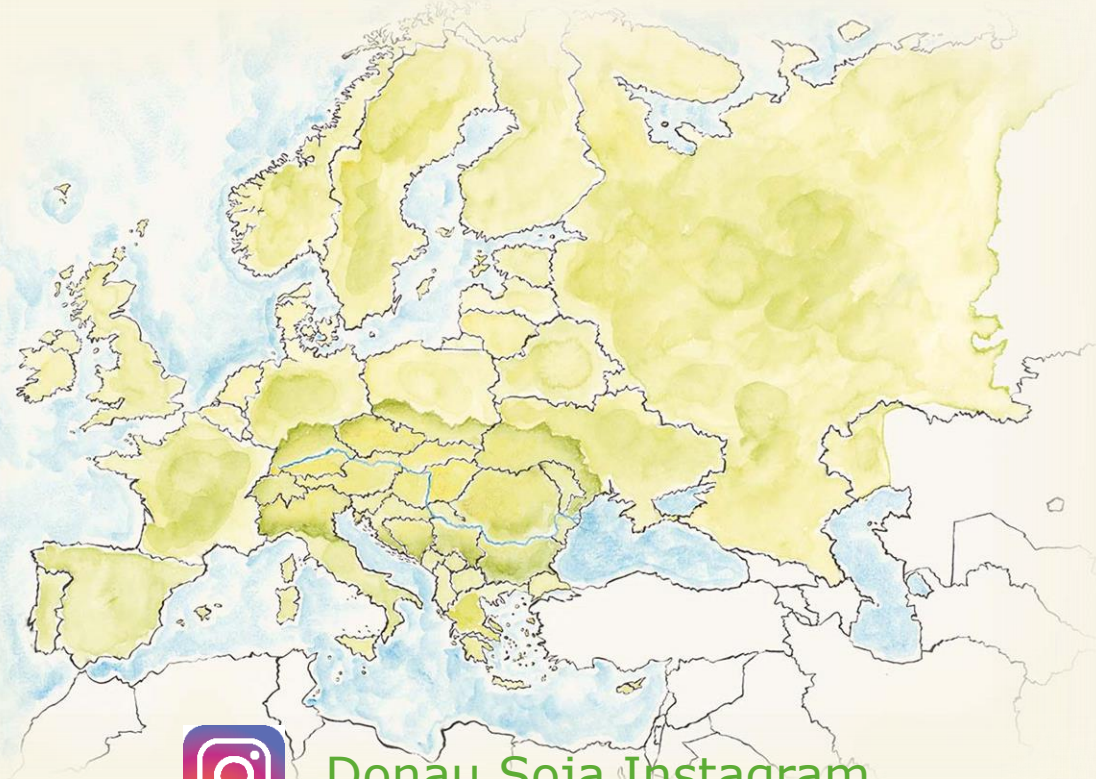


- ✓ How we obtain and use protein has profound consequences
- ✓ Protein and nitrogen are connected
- ✓ N cycle is the most exceeded planetary boundary
- ✓ The Protein Challenge requires a Protein Transition
- ✓ Five pillars leading to better human health, environmental improvement, and rural and economic development



THANK YOU FOR YOUR ATTENTION !

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