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SASI Sustainable
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Initiative

LUNCHBREAK



7 February 2025, 12 – 1 pm

Sustainable soya production

Global challenges from a European perspective



Susanne Fromwald
Secretary General Donau Soja

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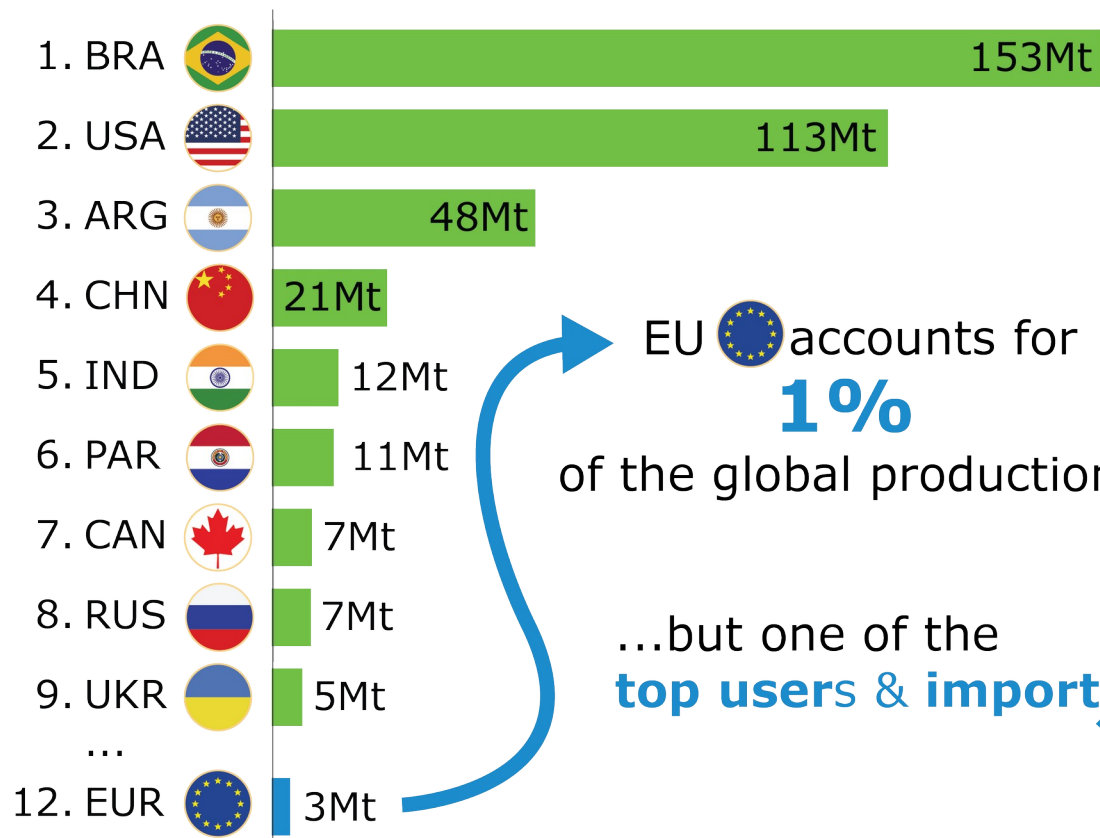


With funding from
 Austrian
Development
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EU's position in the global market



Top 10 soya **producer** globally* (2023/2024):

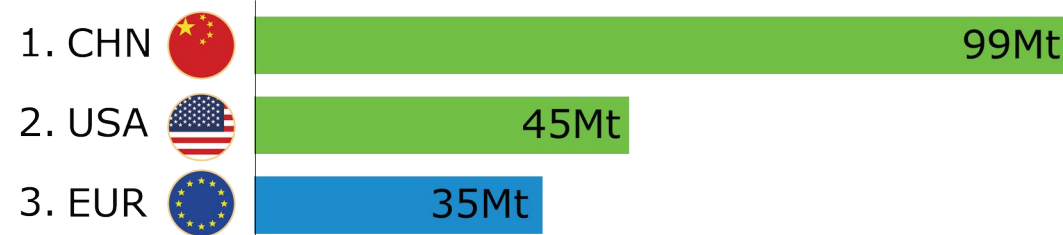


EU  accounts for **1%** of the global production...

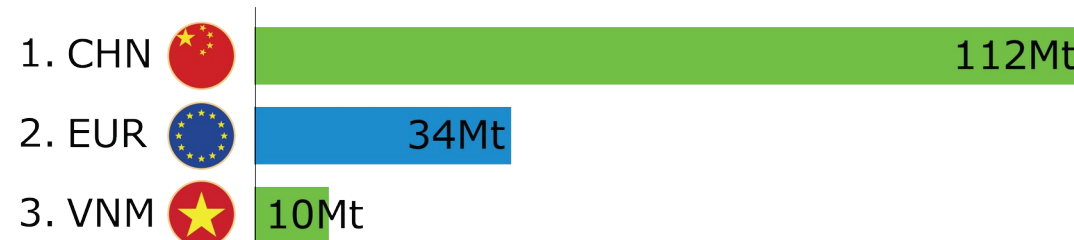
...but one of the **top users & importers**



Top 3 soya **user**¹ globally (2023/2024):



Top 3 soya **importer**² globally (2023/2024):



¹ Soymeal usage in soybean equivalent

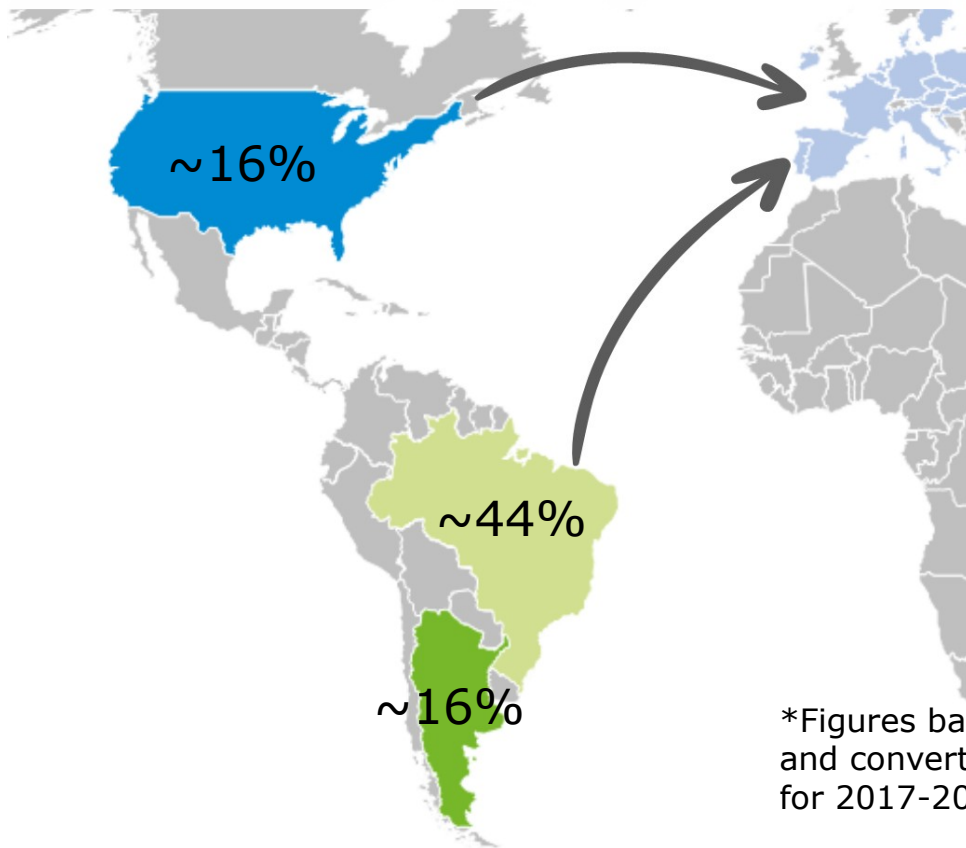
² Soybean import + soymeal import in soybean equivalent

Source: Donau Soja based on USDA data

Sources: Donau Soja based on USDA data

EU-27: Soya imports and deforestation

Annual imports of soya beans
to the EU-27 (in percent)

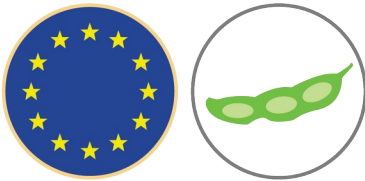


*Figures based on COMTRADE and EUROSTAT data and converted into soya bean equivalents. Average for 2017-2021.

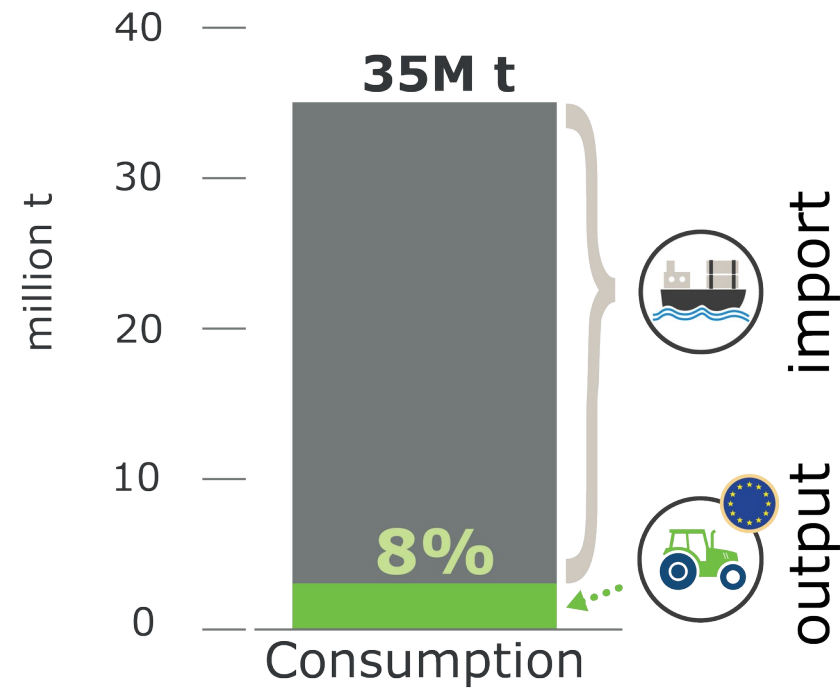


Soya is accountable for 31% of deforestation from agricultural products **imported into the EU** (WWF, 2021)

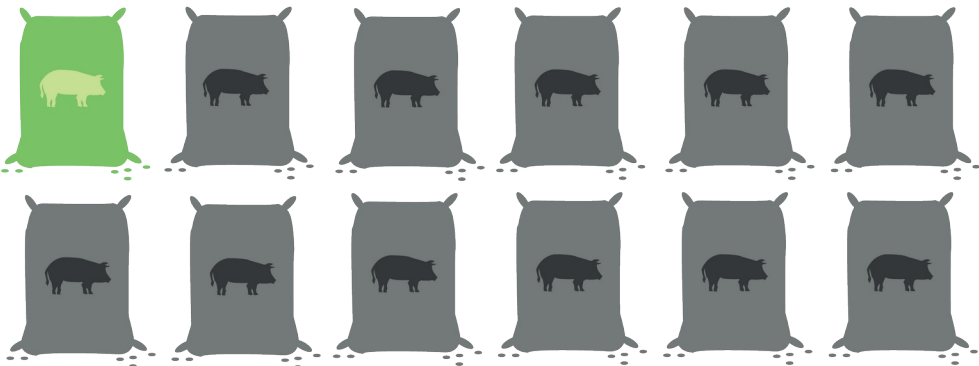
EU soya self-sufficiency (1)



Soya consumption¹ and self-sufficiency² in EU-27 (2024):

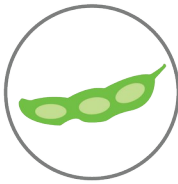


Only 8% of soya consumption is covered by domestic soya production

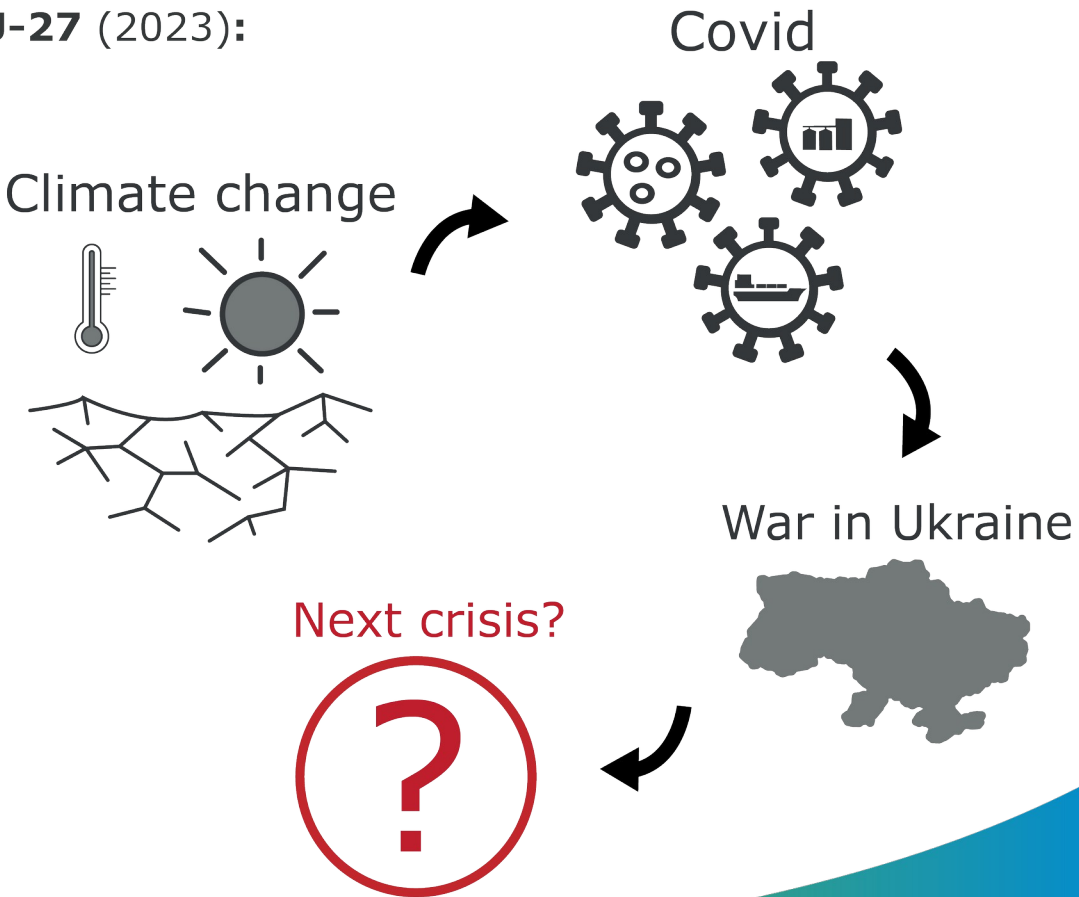
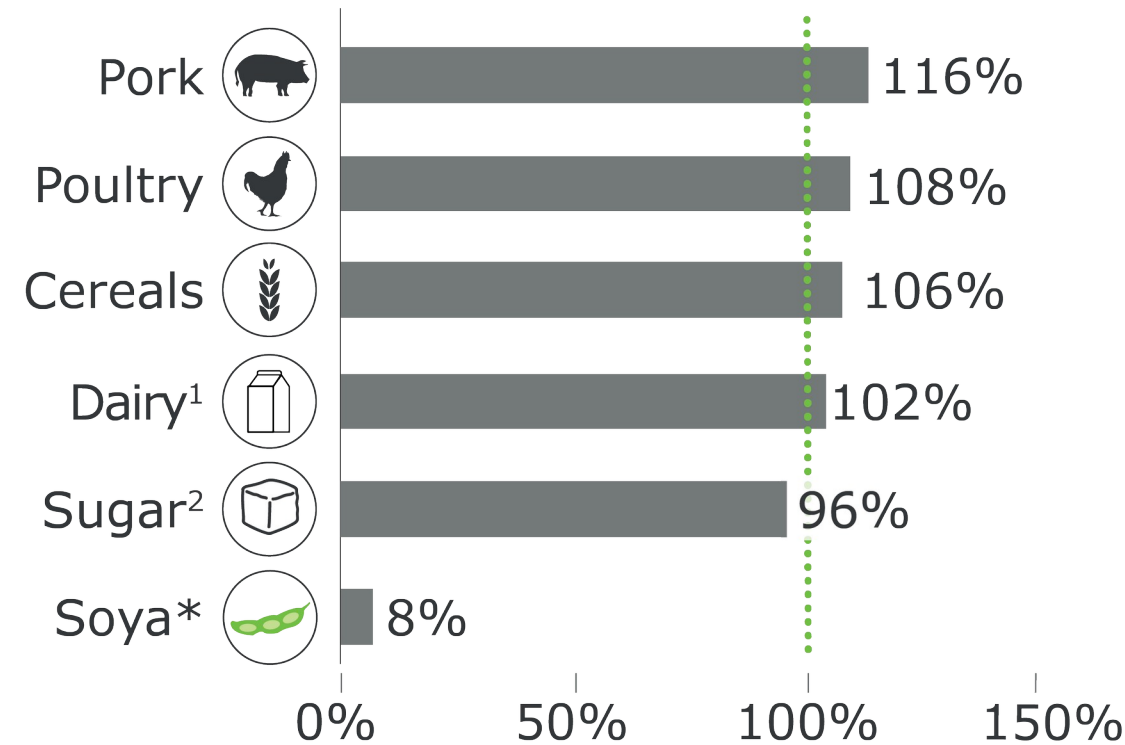


¹ Soya consumption refers to total soymeal consumption in soybean equivalent.
² This ratio shows the extent to which the EU is able to satisfy its domestic demand for soybean meal through domestic soybean production.
Source: Donau Soja based on DG AGRI data

EU soya self-sufficiency (2)



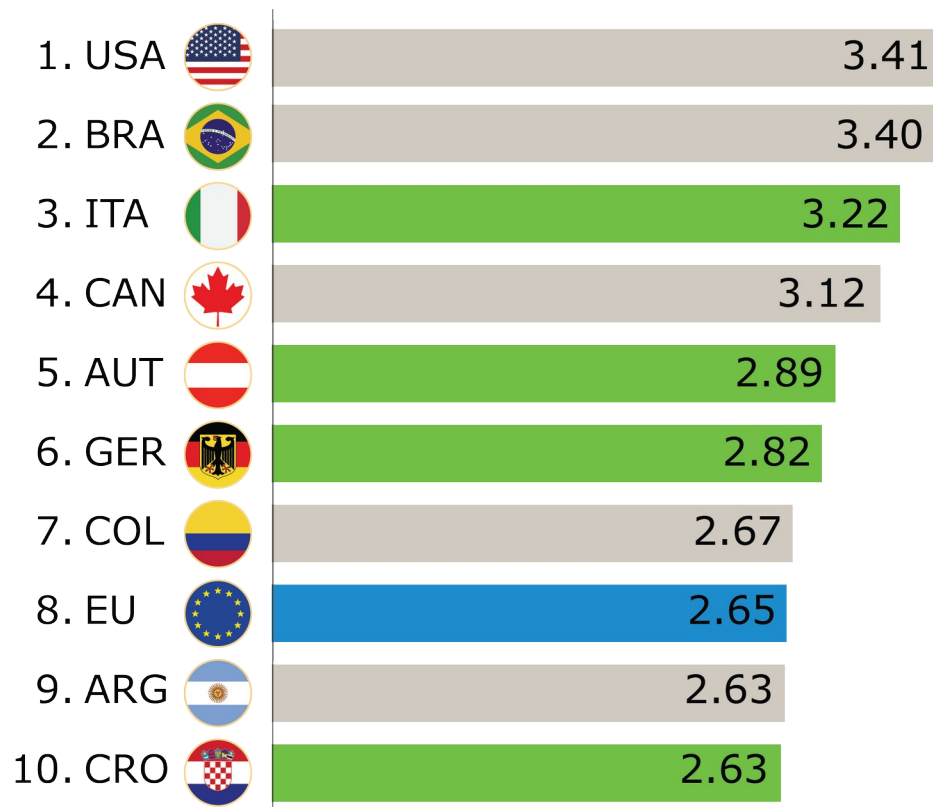
Self-sufficiency ratio* of important agri-products in the EU-27 (2023):



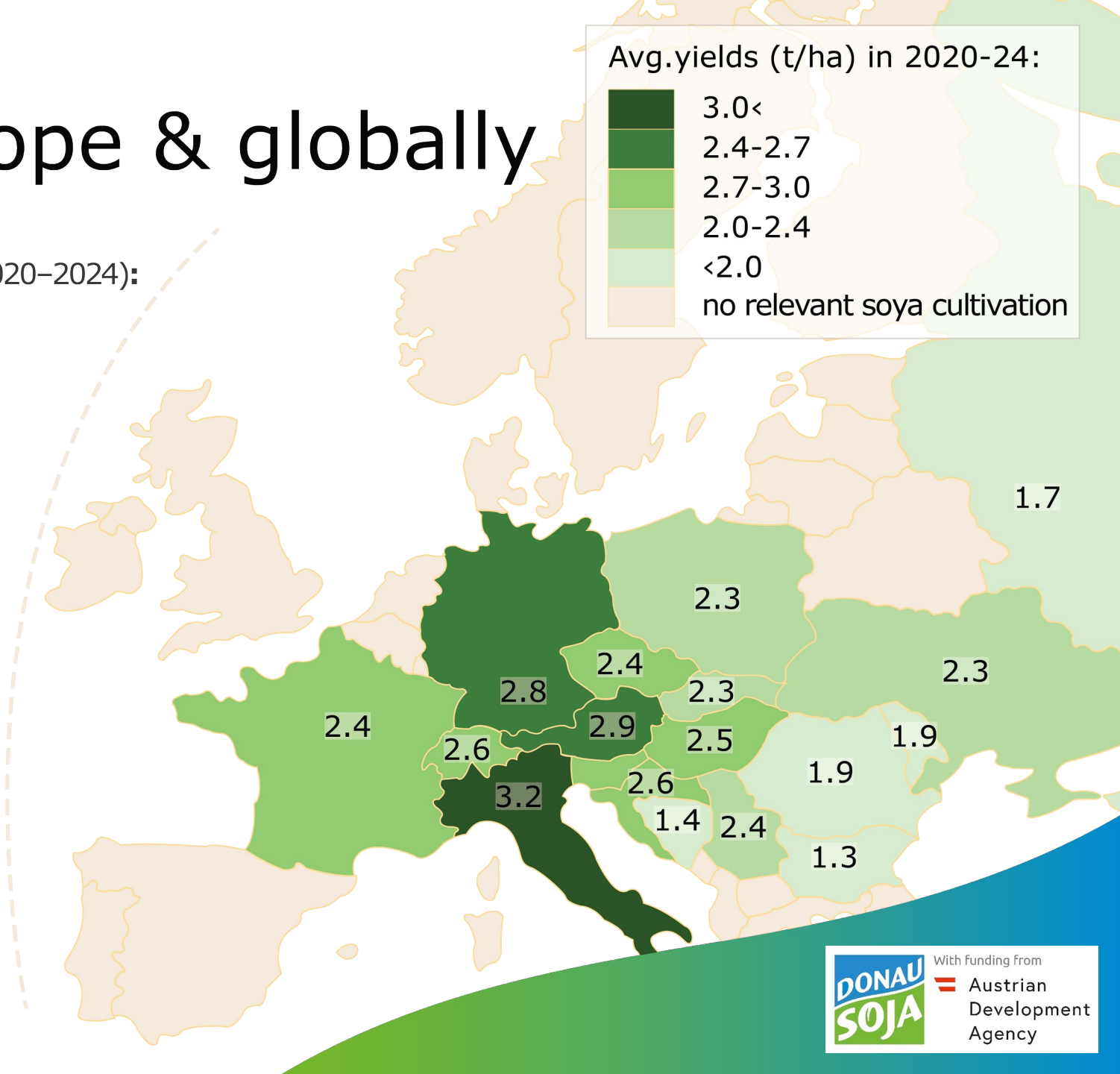
¹ covers only fresh dairy products, namely fresh milk, cream and yogurt ² covers white sugar
* this ratio shows the extent to which the EU is able to satisfy its domestic demand for soymeal through domestic soybean production.
Sources: Donau Soja on basis of DG AGRI data

Soya yields in Europe & globally

Top 10 soya yields globally* (t/ha, 5y-avg. 2020–2024):

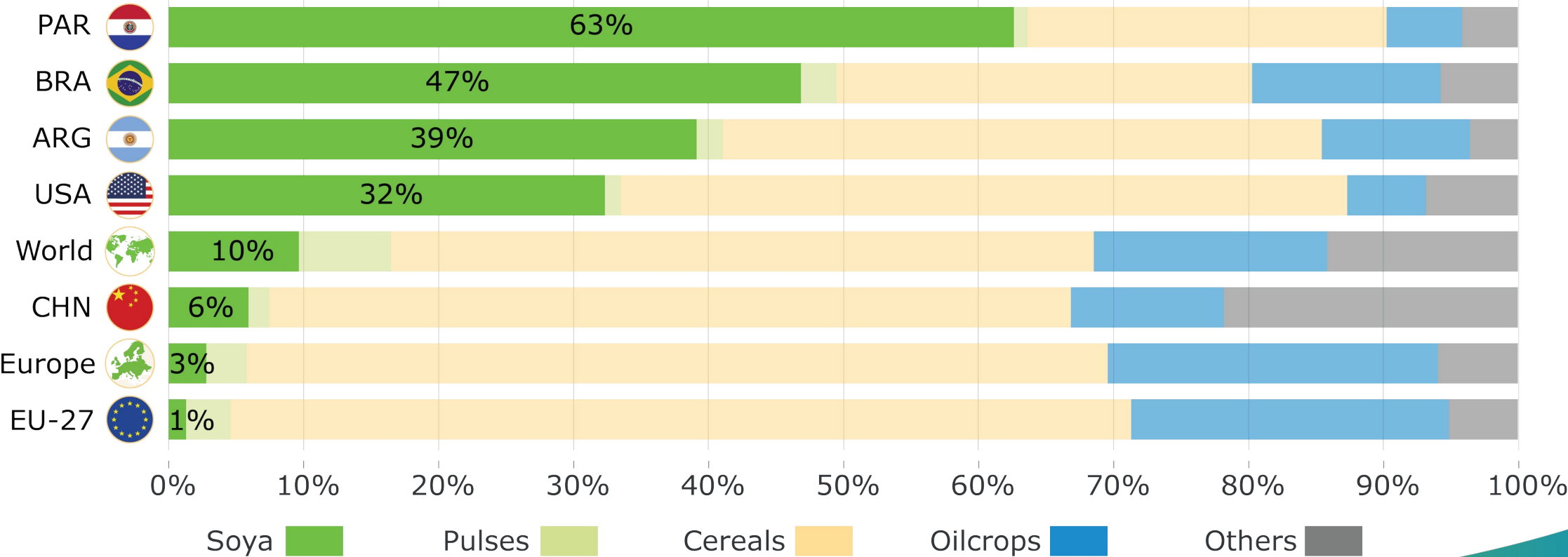


*the bar chart includes countries with minimum 40,000 ha soya area in 2024.
Sources: Donau Soja based on USDA & EUROSTAT yield stats



Soya share of arable land

Harvested area of annual crops by selected region/country in 2023:

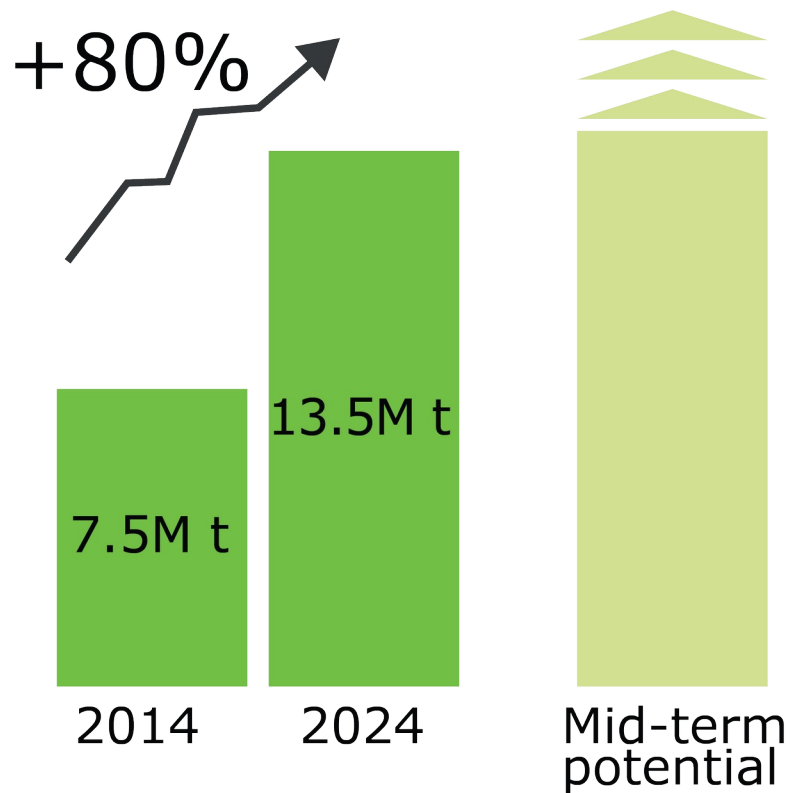


Note: Europe excludes Russia, "Others" include roots & tubers, vegetables and fibre crops. The graph excludes fruits, tree nuts and sugar crops.
Sources: Donau Soja based on FAO data

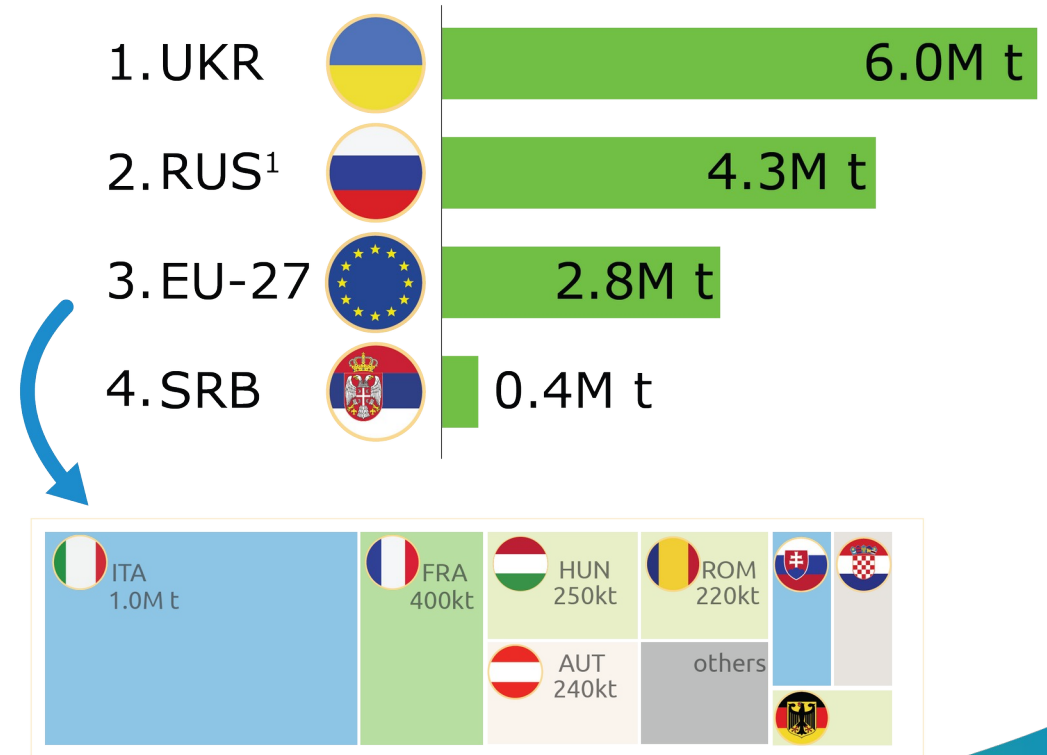
Soya production in Europe



Soya output in Europe (2014 – 2024):



Top soya producers in Europe (2024):

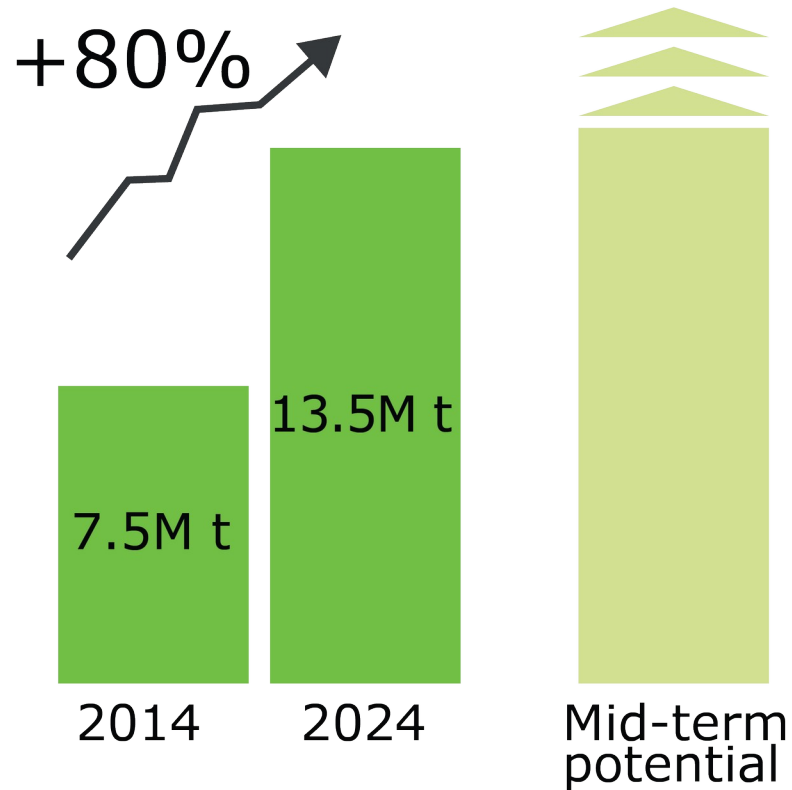


¹it covers only the European part of Russia
Sources: Donau Soja

Soya production in Europe



Soya output in Europe (2014 – 2024):



¹it covers only the European part of Russia
Sources: Donau Soja

Driving factors

Economics



- easy marketing of soya
- high fertilizer/energy costs
- new varieties
- more experience

Sustainability trends



- deforestation-free
- carbon footprint
- regionality
- vegan foods + non-GM

Policies



- self-sufficiency
- subsidies
- crop rotation
- crop diversification
- protein strategy

European Soya: A Gamechanger with Strategic Benefits



Supply Chain Resilience

Need for improvement: 92% of the EU's soya needs are supplied by imports (2022)



Good for the Environment

Soya cultivation in Europe has many environmental benefits at local & systemic levels (soil improvement, less pesticides & fertilisers needed, etc.) & reduces the pressure on ecosystems overseas



Added Value

Local production & processing of soybeans into food & feed products support the domestic economy



Ready for Upscaling

- Soya grows well in Europe
- Knowledge & good inputs are available
- Processing infrastructure is ready

Thank you

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Ukraine: potential for the sustainable, verified deforestation & conversion-free non-GM soya in Europe

Volodymyr Pugachov
07 February 2025



With funding from



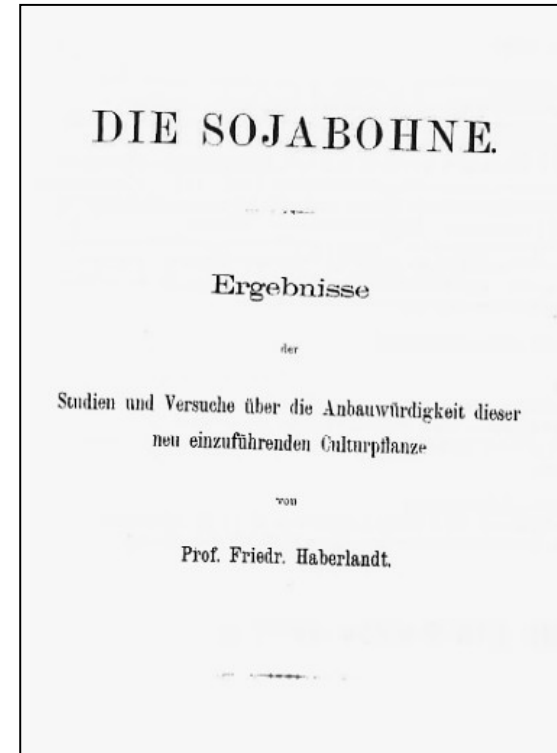
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Europe's soybean pioneer: Friedrich Haberlandt

1878

Prof. Haberlandt's magnum opus, *Die Sojabohne* (The Soybean.) is published in Vienna.

This was the world's first book written entirely about the soybean.



Trial sites Friedrich Haberlandt 1875-1878



Austria **Vienna**

- 1 Gartenpalais Schönborn (damals BOKU)
- 2 Simmering
- 3 Grinzing
- 4 Essling
- 5 Hirschstetten

Lower Austria

- 6 Gmünd
- 7 Lichtenegg
- 8 Schloss Matzen
- 9 Therasburg
- 10 Altlenzbach
- 11 Osterburg
- 12 Münchendorf
- 13 Mödling
- 14 Krems
- 15 Wilfersdorf
- 16 Rabensburg

Upper Austria

- 17 Schloss Grünau
- 18 Ritzlhof
- 19 St. Wolfgang

20 Salzburg

Carinthia

- 21 Friesach
- 22 Klagenfurt

Styria

- 23 St. Peter bei Graz
- 24 Ackerbauschule Grottenhof
- 25 Reitenau

Burgenland

- 26 Bernstein
- 27 Schachendorf
- 28 Sulz

Czech Republic

- 29 Velké Meziříčí
- 30 Napajedla
- 31 Mistek
- 32 Praha
- 33 Brno
- 34 Ivančice
- 35 Děčín Libverda
- 36 Kvasice
- 37 Přerov
- 38 Nový Jičín
- 39 Lednice
- 40 Budišov
- 41 Křižanov
- 42 Mimoň
- 43 Vyšší Brod
- 44 Vojnice
- 45 Krásné Březno
- 46 Cítoliby
- 47 Lovosice
- 48 Třeboň
- 49 Mnichovo Hradiště
- 50 Lužany
- 51 Kadaň
- 52 Klatovy

- 53 Chrudim
- 54 Zámorsk
- 55 Lukavice
- 56 Hluboká nad Vltavou

Ukraine

- 57 Залищики (Salischtschyky)
- 58 Хуст (Chust)
- 59 Зубра (Zubrza)

Slovenia

- 60 Serdica
- 61 Ptuj
- 62 Maribor
- 63 Ljubljana
- 64 Koper
- 65 Rodik
- 66 Rubije
- 67 Slatnik

Italy

- 68 Gradisca d'Isonzo
- 69 Trieste
- 70 Gorizia
- 71 Merano
- 72 San Michele

Hungary

- 73 Miklósi
- 74 Pápa
- 75 Tana
- 76 Kajárpéc
- 77 Eger
- 78 Kápolnás-Nyék
- 79 Mosonmagyaróvár

- 80 Sárbogárd
- 81 Budapest
- 82 Békes-Csaba
- 83 Bálványos

Romania

- 84 Cuieșd
- 85 Fughiu
- 86 Oradea
- 87 Arad
- 88 Lucăcești
- 89 Rădăuți

Slovakia

- 90 Krompachy
- 91 Sučany
- 92 Markušovce
- 93 Poltár
- 94 Mojmírovce

Croatia

- 95 Banija
- 96 Zagreb
- 97 Skradin
- 98 Dubrovnik
- 99 Sinj

Serbia

- 100 Zrenjanin

Germany

- 101 Dargun
- 102 Leisnig
- 103 München
- 104 Weihenstephan

- 105 Erlangen
- 106 Sondershausen
- 107 Bernburg
- 108 Hildesheim
- 109 Düsseldorf
- 110 Leipzig
- 111 Friedberg
- 112 Bonn
- 113 Deuben

Poland

- 114 Kluczowa
- 115 Prószków
- 116 Dunino
- 117 Krzyzowice
- 118 Tyniec Mały
- 119 Poznań
- 120 Brzeźnica
- 121 Klusy
- 122 Szymanowice
- 123 Kurowice
- 124 Tarnów
- 125 Suchowola
- 126 Klecza Dolna

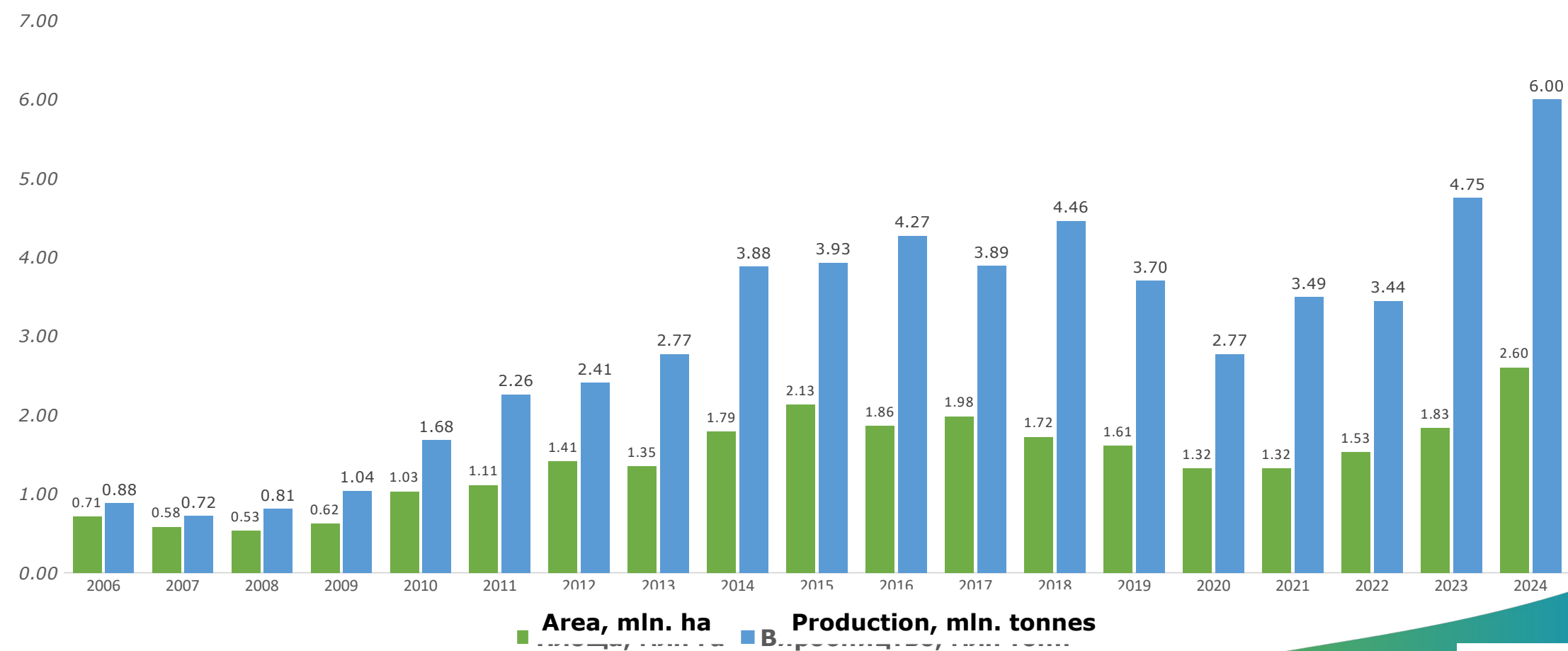
Switzerland

- 127 Chur

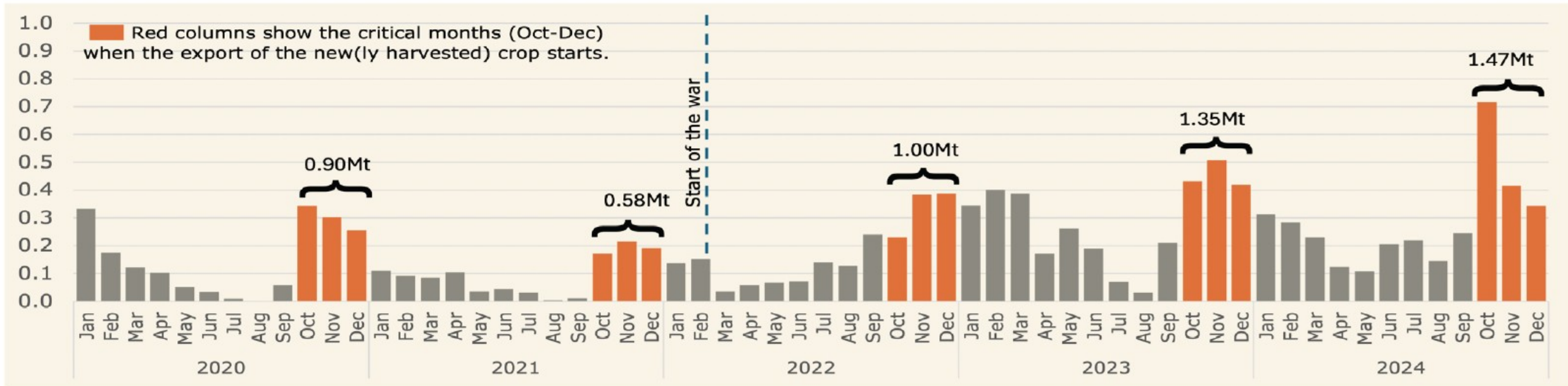
Netherlands

- 128 Wageningen

Soya in Ukraine



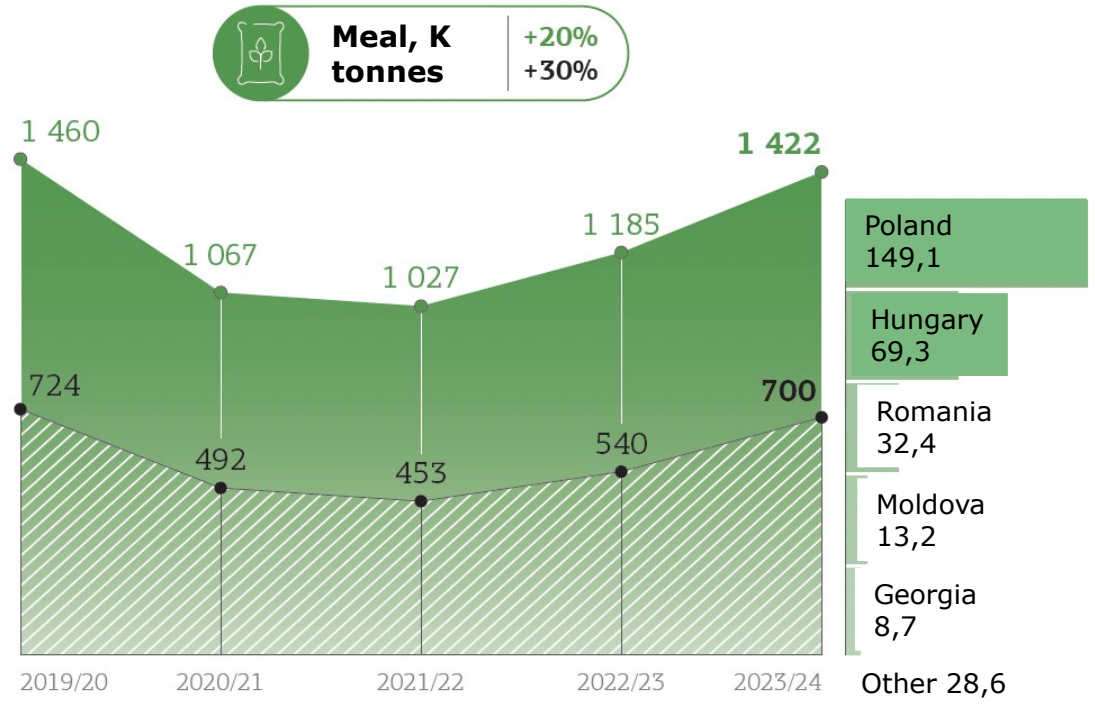
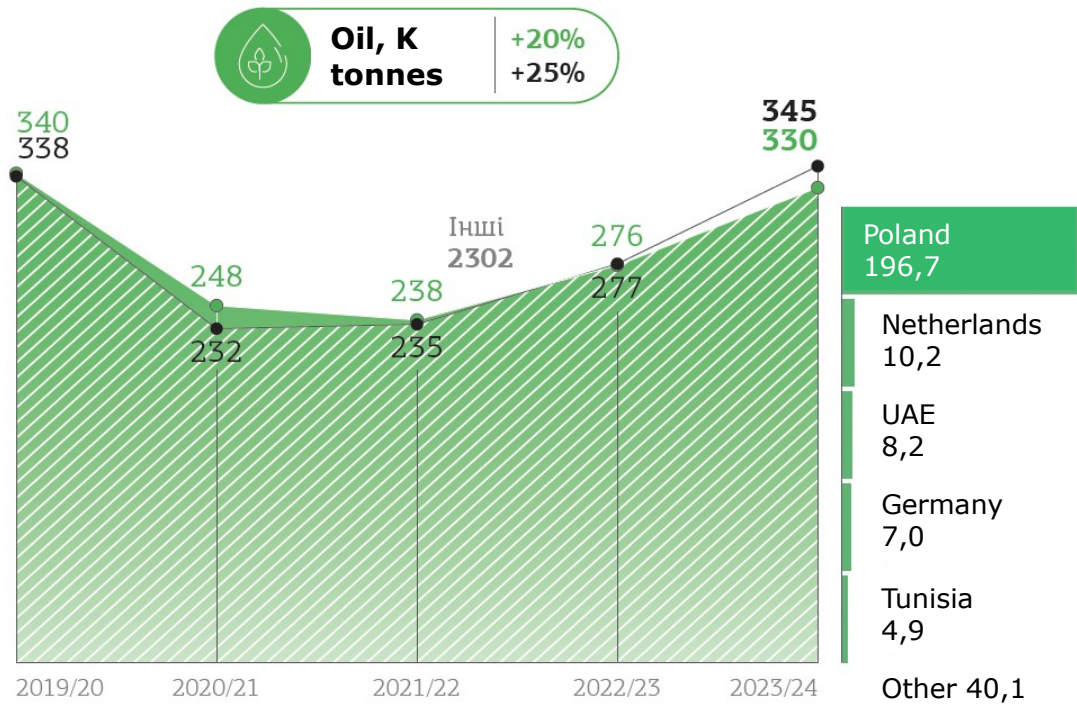
Soya export from Ukraine



* the values refer to both GM & non-GM shipments which are exported to the global market (not only to EU-27)

Source: Donau Soja based on data of Trademap + Ministry of Agrarian Policy and Food of Ukraine

Soya oil and soya meal export from Ukraine



Protein Partnership Programme

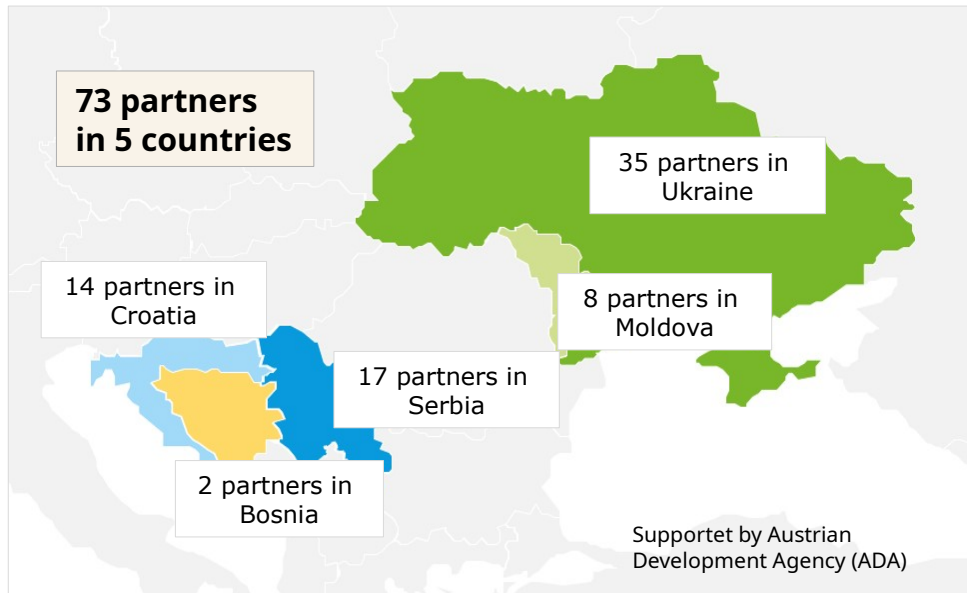
Donau Soja Protein Partnership Programme enables agricultural producers to certify soybeans for compliance with EU sustainability criteria for free:

- ✓ Deforestation and Conversion-free status (cut-off-date 2008)
- ✓ Traceability and segregation
- ✓ Legality of production
- ✓ Non-GM



Protein Partnership Programme

Number of partners & countries



The program has covered over **1.6 million tonnes** of non-GM soybeans in Ukraine the past 3 years (25% of all non-GM soya in UA).

Farm inspections are included, which allowed for the initiation of a **pilot project and EUDR verification** in 2024 (only in Ukraine).

Sponsors of the programme



Donau Soja Academy



A primary focus of the Academy is to advance the agronomy of protein crops, particularly soybeans.

In **5 major soy producing countries** in Eastern Europe

Includes **trainings, field trials, webinars** and other activities specially adapted to the specific needs and challenges of different regions.

Supported by Protein Partnership Programme and the Austrian Development Agency.

Agri-climatic Atlas for soya cultivation in Ukraine

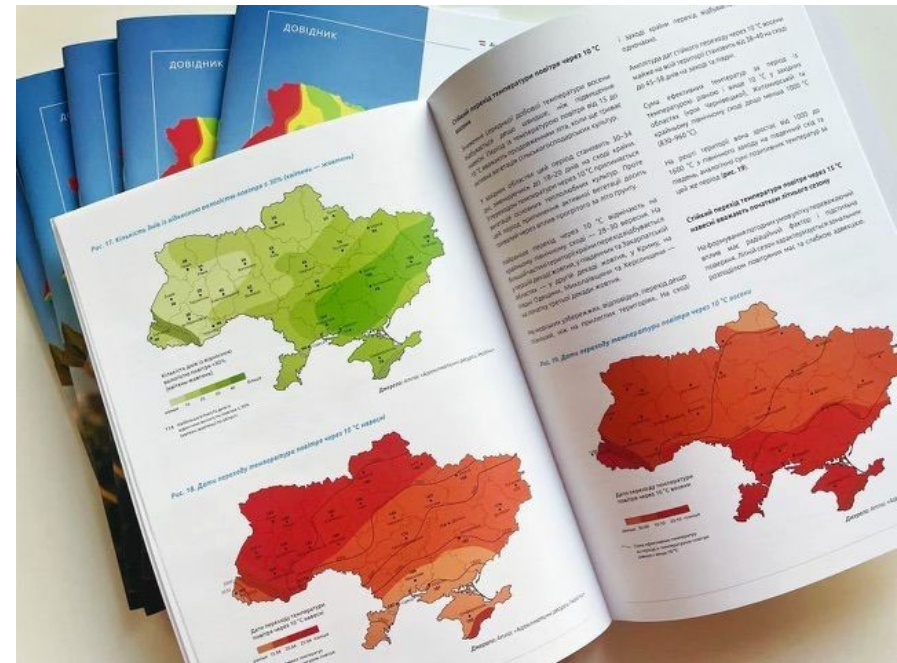
Agri Climate Atlas provides comprehensive information on climate change, its impacts, and potential adaptation measures in the soya production in Ukraine.

The Atlas includes data and information on:

- climate projections;
- soya suitability and soil characteristics;
- water resources.

This is helpful for soya farmers to make informed decisions about variety selection, irrigation, and pest management, among others.

We're excited about the potential of Atlas to help Ukraine's soya farmers and policymakers to adapt to the issues of climate change.



EU Integration of Ukraine

The Government of Ukraine has adopted the **Strategy of agricultural and rural development till 2030.**

The Strategy is a condition of the Ukraine Facility Agreement and aims to integrate Ukraine's agricultural policy with the EU's Common Agricultural Policy (CAP), Farm2Fork, and other policies.

One of the key strategic goals is to implement **climate-smart agricultural practices** to mitigate and adapt to climate change.



EU Deforestation Regulation

Key Features of the Regulation

On December 30, 2025, the regulation comes into application — impacting this year's soya harvest. From now on, it will be impossible to legally import any ton of soya into the EU without fulfilling the following conditions:



- ✓ **Geo-coordinates of the fields** (Article 9(d) of the Regulation);
- ✓ **Confirmation of no deforestation on these fields after 2020** (Article 9(g) of the Regulation);
- ✓ **Traceability of each batch of the product to the field where it was grown** (Article 9(d) of the Regulation);
- ✓ **Confirmation of the legality of production** (Legality — Article 9 (h) of the Regulation).
- ✓ **Country of cultivation and Harvest Date** (Article 9 (c) and (d) of the Regulation)

Goal: Ensure deforestation-free supply chains in the EU

EU Deforestation Regulation

Annex I of the EUDR defines which products are covered and can be compared using Harmonised System Code:



1201

Soya beans

1208 10

Soya bean flour

1507

Soya bean oil and its fractions, whether or not refined, but not chemically modified

2304

Oilcake and other solid residues resulting from the extraction of soya bean oil, whether or not ground or in the form of pellets, resulting from the extraction of soya-bean oil

Monitoring changes in land use and deforestation

Areas 2023 (soya):


- 1) Collection of geodata during farm audits;
- 2) Remote sensing: Landsat 5, Sentinel 2;
- 3) Surveyed area:
approximately 250,000 hectares;
- 4) Conclusions and clarifications for
the process in 2024.

Areas 2024 (soya):

- 1) Geodata collection: completed;
- 2) Remote sensing conducted – 330,000 hectares.



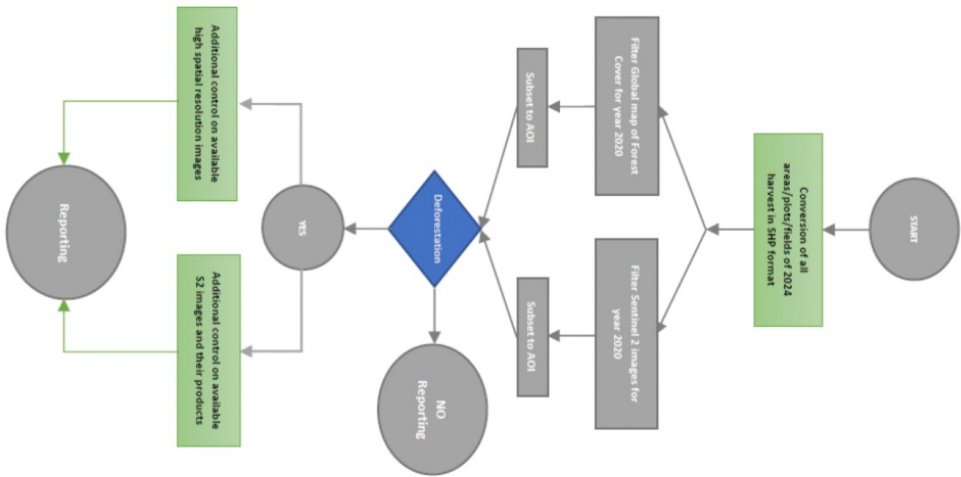
Protein Partners already got



Deforestation status of arable land used for Donau Soja production(harvest 2024) in Ukraine 2020-2024

(performed for the purpose of Donau Soja Organisation Integrity Control)

Report



Deforestation		Risk					
YES	NO	No Risk	Very Low Risk	Low Risk	Moderate Risk	High Risk	Maximum Risk
0	58	37	19	0	2	0	0

Protein Partners already got

Period: October – November 2024

Donau Soja certified partners can provide the following information, that helps to meet EUDR requirements:

- ✓ **The geo-locations of soya fields** in the Donau Soja IT traceability System (with the possibility to convert in GeoJSON format as accepted for EUDR):
- ✓ **Land Use Verification 2024** — based on satellite image analysis;
- ✓ **Legality** — via the inspection checklist for audits;
- ✓ **Donau Soja/Europe Soya certificate.**

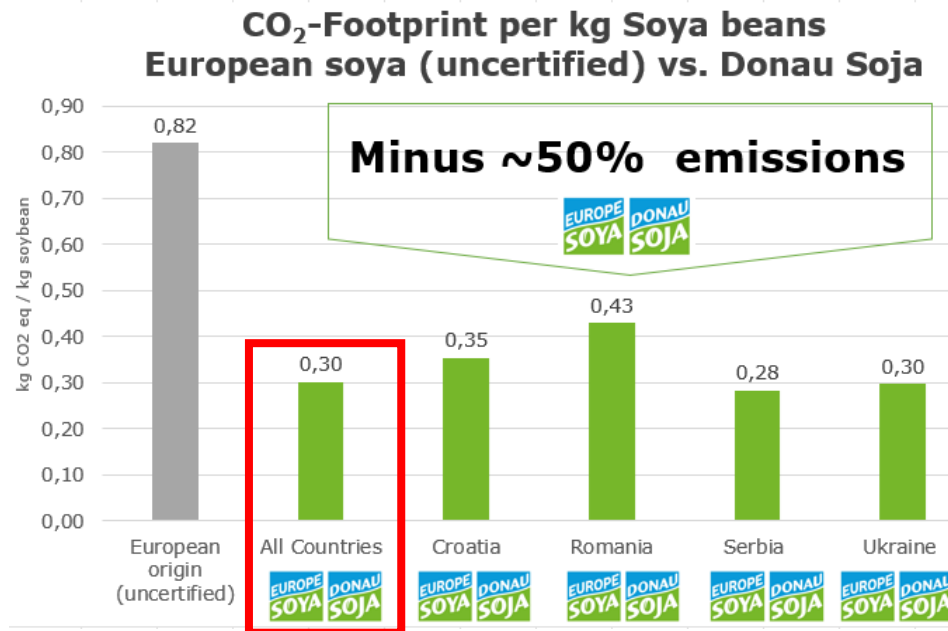
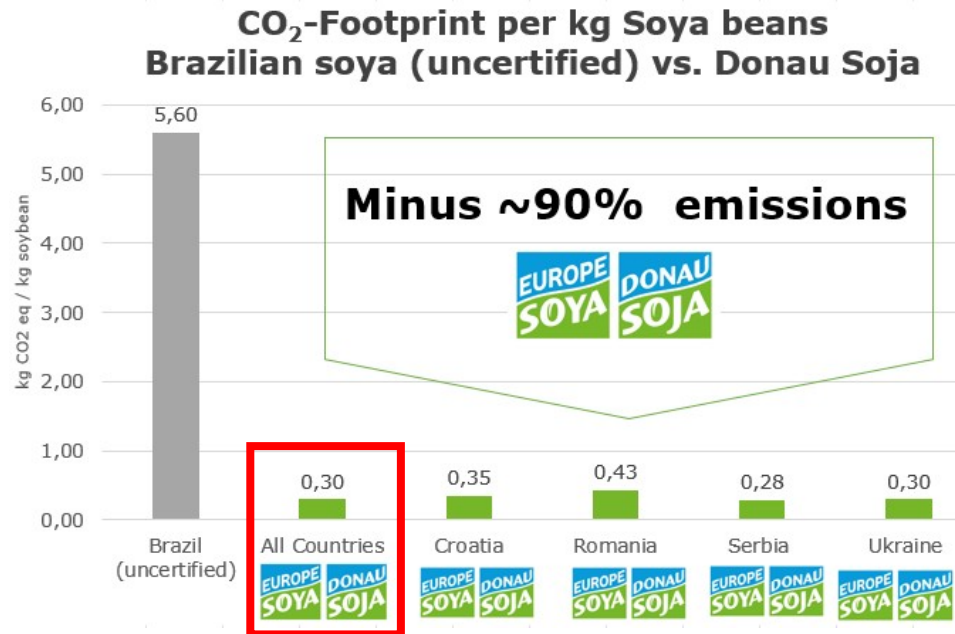
Goal: ensure that Due Diligence declaration is made easily by the importer of Donau Soja soybeans/oil/meal) in the EU)



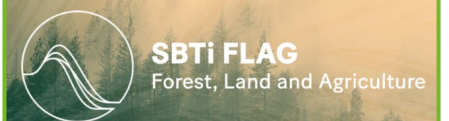
CO₂-Reduction for soybeans with Donau Soja

Up to 90% CO₂ reduction compared to Brazilian soya & 50% compared to European soya

The latest Donau Soja CO₂-values (Blonk 2024, red box) can be used for all Donau Soja volumes, independent of cultivation country. This simplifies carbon footprint calculations & goal setting.

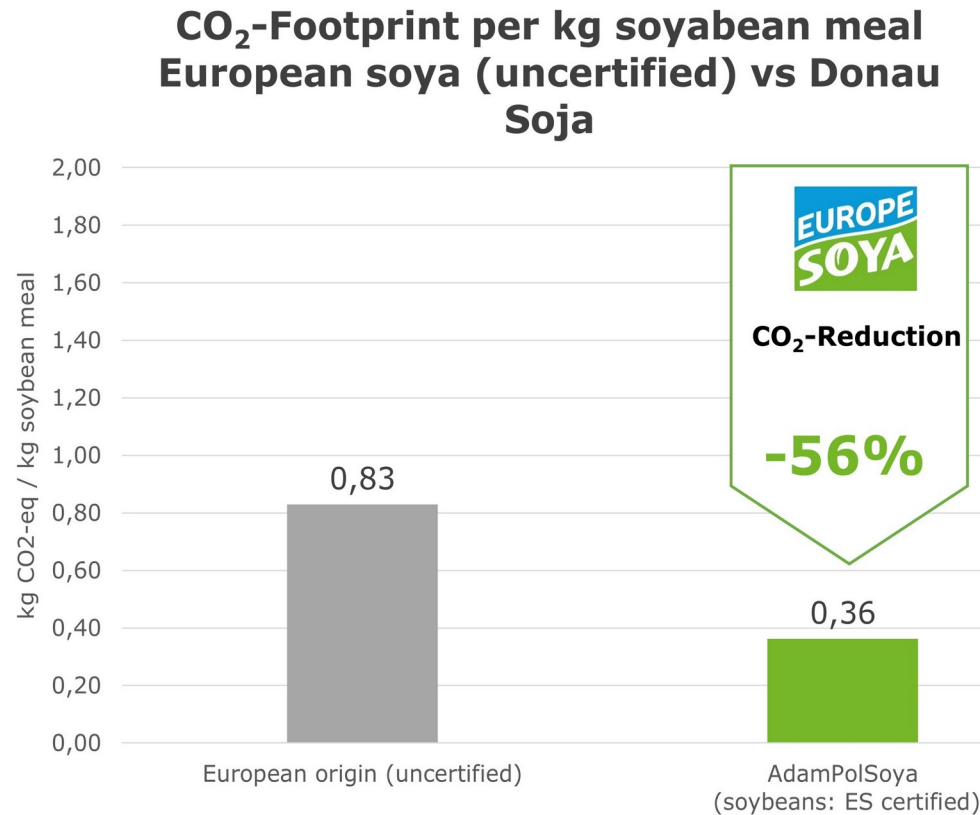
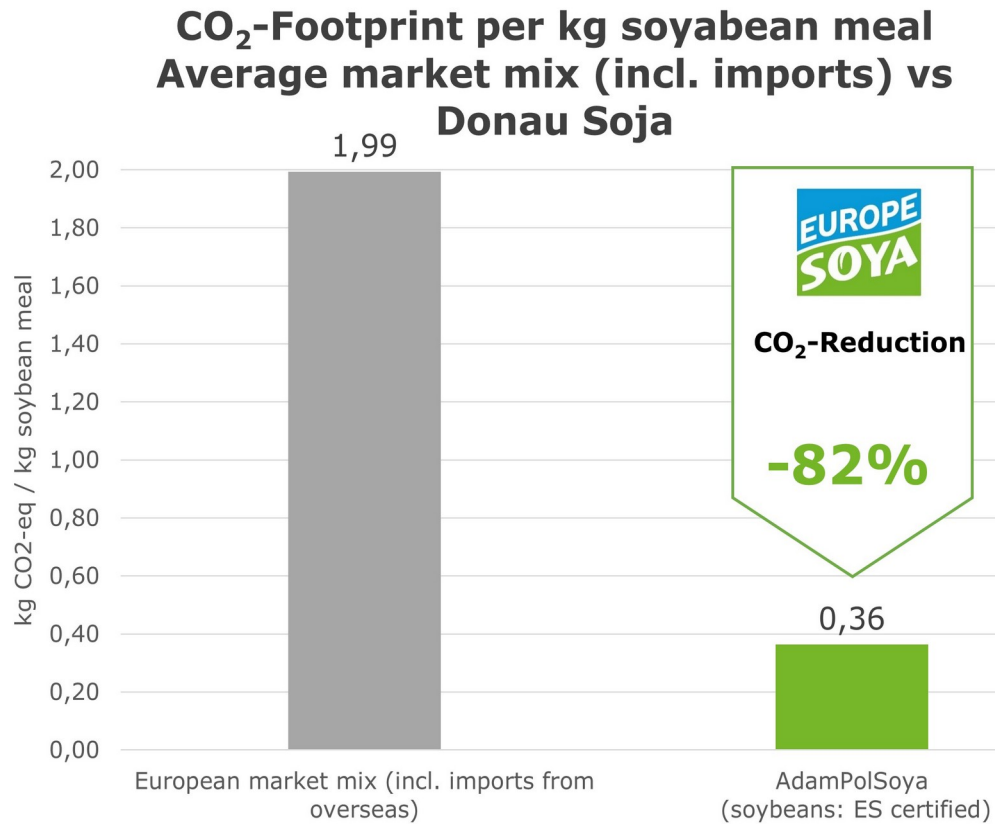


- DS/ES CO₂ data available as „branded datasets“ in recognised databases
- In SBTi FLAG format



CO₂-Reduction in Soybean Meal with Donau Soja

Up to 82% CO₂ reduction compared to average soya processed in Europe and 56% compared to soya of European origin



Thank you!

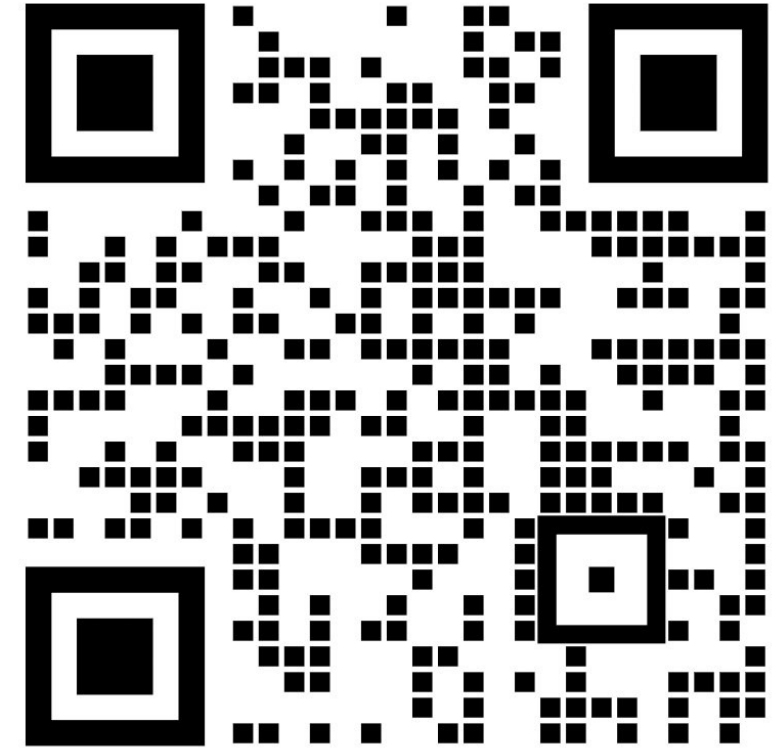


Volodymyr Pugachov, Ph.D.

Executive Director of Donau Soja in Eastern Europe

Deputy head of the agricultural committee of the Ukrainian Chamber of Commerce and Trade

Certified export consultant



Business and Climate Change:
Towards Net Zero, Cambridge
Institute for Sustainability Leadership
(CISL)



Sustainability: Strategies and
Opportunities for Industry,
Massachusetts Institute of
Technology (MIT)





Federal Ministry
for Economic Cooperation
and Development

Implemented by



Deutsche Gesellschaft
für Internationale
Zusammenarbeit (GIZ) GmbH

Thank you for joining !

See you at our next Lunchbreak on March 7.
The topic will be shared soon.