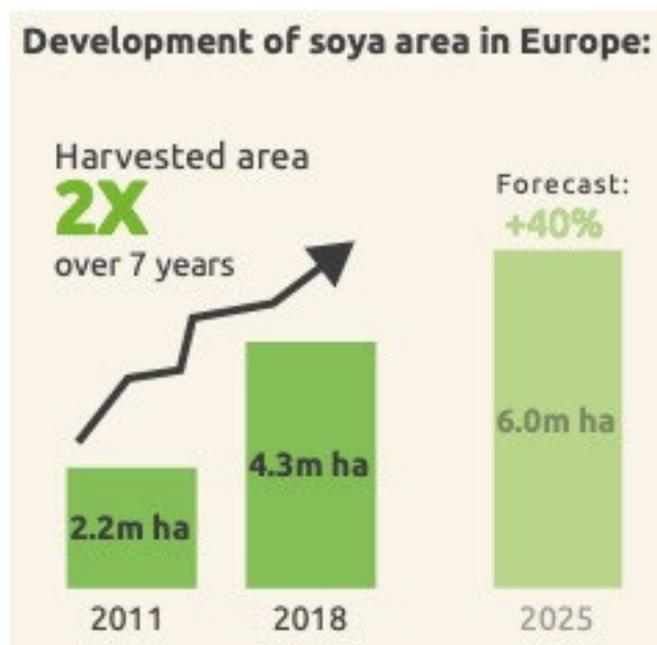


## SOYA CULTIVATION IN EUROPE

While cultivation of soya is often related to South America, monocultures, intensive use of pesticides like glyphosate and rainforest deforestation, soya is a crop that grows very well also in Europe. The **highest average yields** of soya are reported from Europe<sup>1</sup>, with the consumer benefit<sup>2</sup> that cultivation of genetically modified soya is not allowed, at least not in the EU<sup>3</sup>.

In 2018 the cultivation of 4.3 Mio ha in Europe resulted in the production of 10 Mio tons of soya beans. The acreage of soya has been **doubled over the last seven year** and there is still an enormous potential to increase soya production as soy is an important break crop in crop rotation and currently represents only 2 %<sup>4</sup> crops cultivated in Europe.

An increase of soy cultivation **up to 6 Mio ha by 2025**<sup>5</sup>(plus 40 % from 2018) seems realistic.



<sup>1</sup> Italy, 3.23 tons/ha in an 5-year average of 2014-2018; Yield calculation is based on Donau Soja Statistics - [https://www.donausoja.org/fileadmin/user\\_upload/Activity/Agriculture/Statistics/ds\\_soya\\_stats\\_may2019\\_update03052019.pdf](https://www.donausoja.org/fileadmin/user_upload/Activity/Agriculture/Statistics/ds_soya_stats_may2019_update03052019.pdf)

<sup>2</sup> Source Eurobarometer (31 % of consumers in the EU are concerned about GM ingredients and genome editing) [https://www.efsa.europa.eu/sites/default/files/corporate\\_publications/files/Eurobarometer2019\\_Food-safety-in-the-EU\\_Full-report.pdf](https://www.efsa.europa.eu/sites/default/files/corporate_publications/files/Eurobarometer2019_Food-safety-in-the-EU_Full-report.pdf)

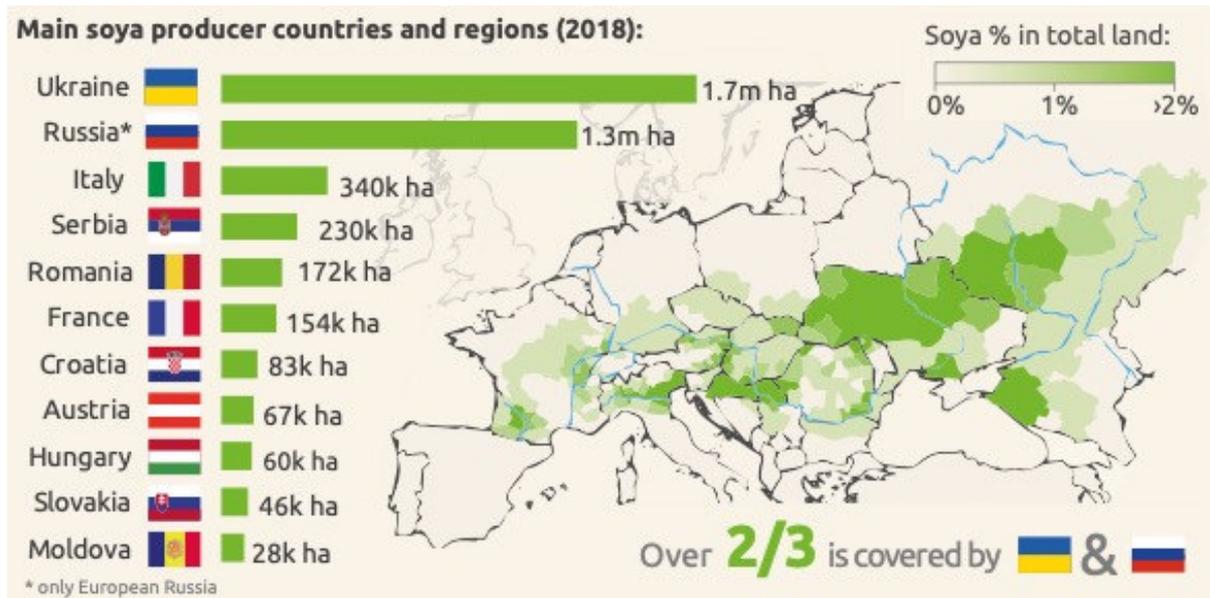
<sup>3</sup> Also in other European countries that are relevant for European soya production like Serbia, the Ukraine and the European part of Russia cultivation of GM-soya is not allowed, but in the Ukraine 50 – 70 % of soy production is coming from illegal soya cultivation while Serbia and Russia are reported to have strict controls and no GM cultivation. Currently the Ukraine is working on the revision of its GM legislation following agreements made in the Association Agreement with the European Union.

<sup>4</sup> While soya represents only 2 % in European crop rotation, it counts for up to 70 % in some countries in S-America like Paraguay or 44-45 % in Brazil or Argentina.

<sup>5</sup>This would cover 35-40 % of soy consumption in the EU as currently around 40 Mio tons of soya (beans equivalent) are consumed in the EU.

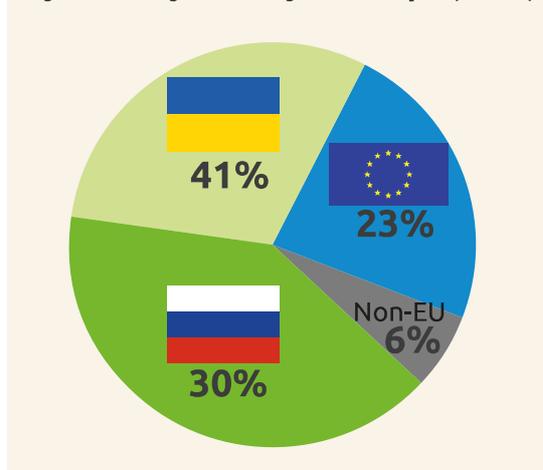


The following graph shows where soy is mostly grown in Europe<sup>6</sup>:



Interestingly 2/3 of the European soya production take place outside the European Union, mostly in the Ukraine and the European part of Russia:

**Soya area by country in Europe (2018):**



European production (tons) in 2018 <sup>7</sup>	
Ukraine	4,400,000
Russia* <sup>8</sup>	2,210,000
Italy	1,100,000
Serbia	825,000
Romania	490,000
France	394,000
<b>Total</b>	<b>10,400,000</b>

<sup>6</sup> The map was based on data collected from regions of every soya producer European countries.

<sup>7</sup> „Donau Soja Statistics -

[https://www.donausoja.org/fileadmin/user\\_upload/Activity/Agriculture/Statistics/ds\\_soya\\_stats\\_may2019\\_update03052019.pdf](https://www.donausoja.org/fileadmin/user_upload/Activity/Agriculture/Statistics/ds_soya_stats_may2019_update03052019.pdf)

<sup>8</sup> European part of Russia



In a global comparison agricultural standards in the European Union can be considered quite high. But as demonstrated in graph 2 and 3 approximately 2/3 of European soy cultivation takes place outside the EU, particularly in countries with considerably lower standards than the EU, e.g. with respect to the use of chemicals or illegal GM cultivation.

Therefore it is important to source also European soya from certified sources: (1) to have a quality product that fulfils at least **EU levels of sustainable practices** and therefore (2) also creates a **level playing field for EU farmers** and (3) avoids double standards for European production. Additionally **Donau Soja** and Europe Soya Standards guarantee a safe and independently well inspected high quality product<sup>9</sup> that **goes beyond** levels of EU legislation in some areas of specific consumer concern like **Glyphosate**: Donau Soja and Europe Soya production bases on the cultivation according to a Best Practice Manual<sup>10</sup> and a ban on desiccation with substances like Glyphosate.

## BENEFITS OF DONAU SOJA/EUROPE SOYA CERTIFICATION

	<b>Donau Soja (DS)/ Europe Soya (ES)</b>	<b>European soya (without certification)</b>
<b>Product quality &amp; safety</b>	Quality product according to DS/ES standards	No-Name-product
	Certification by independent certification bodies	No independent certification
	Controlled quality along the whole value chain from field to fork	No security
<b>Land Use Change</b>	No land use change/ deforestation/land conversion, no clearing of natural areas, no cultivation in protected areas	No regulation on land use change except for respective national laws if existing
<b>Pesticides</b>	Pesticide requirements: EU legislation as baseline, ban on Stockholm & Rotterdam convention chemicals, ban on WHO 1a/1b chemicals, ban for aerial spraying, no desiccation and thus no Glyphosate in cultivation	No pesticide regulation except for respective national laws that can be much below EU legislation (e.g. Ukraine, Russia)
<b>Origin</b>	Independently inspected origin back to the farm; isotope analysis as verification tool	No controlled origin

<sup>9</sup> Donau Soja has a three staged inspection system including independent third party audits by registered certification bodies. Criteria like Origin, Non GM and pesticide residues are regularly checked by analytical tests like isotope testing, PCR analysis and pesticide analysis.

<sup>10</sup> Donau Soja organisation has a strategic partnership with the Austrian Development Agency (ADA) to support the training of farmers for more sustainable agricultural practices and increase sustainable soya production in the target countries Serbia, Bosnia, Moldova and the Ukraine.



<b>Genetic engineering</b>	Compliance with the German, Austrian or Danube Region Non-GM Standards (VLOG, Codex)	Non-GM not guaranteed/checked/certified in the supply chain
<b>Marketing &amp; Communication</b>	Donau Soja offices as contact points for partners and consumers; communication with media and other stakeholders	No specific communication
<b>Consumer label</b>	Product label available,	No label, no contact person;
	Clear message to the consumer about safe and traceable quality product;	No-Name-Product
<b>Farmers</b>	Certified and labelled products support the development of stable supply chains for farmers, collectors and processors	In anonymous supply chains spot market buying dominates – often to the detriment of weaker market players such as farmers
<b>Network, consultation &amp; services</b>	Donau Soja Organisation has an existing network of offices and consultants	No structure, no service