



Donau Soja Annual Report

2019

Donau Soja Organisation is a change project. Donau Soja is the serious attempt to organize, support and channel change on a European scale. We at Donau Soja come from different countries. But we work together to achieve common goals.

Donau Soja has a significant impact on the future of farming, the future of nutrition, the future of our children. A balanced crop rotation without monoculture, with more legumes improves the nitrogen cycle, influences the pesticide balance and reduces soya imports from sensitive ecosystems.


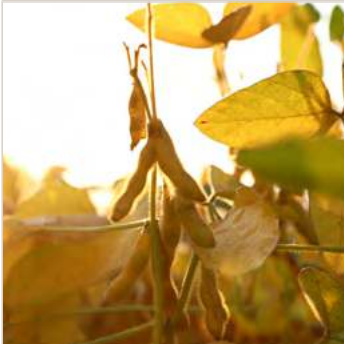




DONAU SOJA ASSOCIATION
Promoting a sustainable, safe and European protein supply
www.donausoja.org
Wiesingerstrasse 6/14
1010 Vienna

Edited by
Donau Soja
Designed by
Donau Soja

Photos:
by Donau Soja Association
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FOREWORD



DONAU SOJA FROM EUROPE FOR EUROPE



COOPERATION AND TRUST. THOSE ARE THE DRIVERS OF THE FUTURE

As we finalise our annual report, the world is presented with difficult challenges while Europe is facing major changes in food and agriculture. The pandemic has shown how vulnerable Europe's overseas soya bean supply is and how important it is to rely on long-term, regional partnerships to make our market more resilient. Cooperation and trust. Those are the drivers of the future. The crisis has shown that the Donau Soja strategy is good for Europe. In recent years, the soya harvest in Europe has doubled to over 10 million tonnes. Security of supply has improved and a second, European supply chain has been established alongside soya from overseas. It is good for us in Europe. It is good for the world: every hectare of soya in Europe takes the strain off sensitive ecosystems on other continents. The EU's biodiversity strategy has just been presented; now national strategies for 2021 to 2030 must be drawn up. In addition to traditional crops, such as cereals and corn, we need legumes (beans, peas, lentils, etc.). They promote more sustainable crop rotations, reduce the need for nitrogen fertilisers

and pesticides, improve soil quality, and we create added value for all.

Donau Soja is helping soya acquire a truly European identity. A new face for European farmers. We guarantee 100% transparency through high standards and strict controls and connect consumers with European soya farmers and producers. This protein partnership is a climate partnership. After all, the CO₂ footprint of food is determined by feed. The Research Institute of Organic Agriculture (FiBL) proves that Donau Soja/Europe Soya certified animal feed avoids around 40% of CO₂ emissions.

Join us on our exciting journey to a more localised, versatile, resilient and high-value-added agriculture. We are here for you; we are on this journey together with you.

**Cordially,
Matthias Krön
Donau Soja President**

DONAU SOJA BOARD, PRESIDIUM, ADVISORY BOARD, AND THE SCIENTIFIC ADVISORY BOARD

No Seven-Year Itch

What is true of married life, is not necessarily true of organisations: Donau Soja looks back on a happy, exciting and successful seventh year of existence.

In 2019, the Donau Soja Board, Presidium and Advisory Board held meetings, debated important decisions, supervised management, and gave strategic guidance to steering the organisation. The good tradition to have transparent and joint meetings by the three boards together was continued, and we proudly welcomed 20 new members to the association.

One of the milestones of the past year was the international recognition earned by Donau Soja and Europe Soya from several reputable institutions. Our standards are now recognised by the Swedish Soy Dialogue and the UK Roundtable, whereas the Dutch National Committee of the International Union for Conservation of Nature (IUCN, NL) as well as the German Thünen Institut recommended Donau Soja as standard setter. Moreover, the German VLOG (Association for Food without Genetic Engineering) now recognises Donau Soja/Europe Soya certification as equivalent to VLOG's.

On top of that, Switzerland has now joined the Europe Soya Declaration. The declaration was initiated by Donau Soja in 2017 to promote sustainable soybean cultivation in Europe. Switzerland became the 19th country to have signed it giving us huge support and strength in pursuing our mission.

At the same time, Donau Soja's regional work has borne ample fruit: In Austria, the celebrations around World Egg Day provided a great opportunity to acknowledge the impact of the Donau Soja standard. The transition

of Austrian egg production to regionally farmed soya (Donau Soja) has resulted in the important outcome of reduced CO₂ emissions: Austrian egg farmers generate 36% less CO₂ emissions compared to the Western European Standard model, the Research Institute of Organic Agriculture (FiBL) has confirmed. Moreover, Donau Soja's dialogue with various stakeholder groups has resulted in an endorsement of Donau Soja in the government programme of Austria's federal government.

In the Southern Europe Region, members and partners raised their glasses to the 5-year anniversary of the Donau Soja Regional Centre at Novi Sad. This celebration was timed to the market launch of the Danube Region non-GM certified animal feed for egg farms. This is a big success for the local market.

In the spring, our East European Regional Centre's workshop "Feed and Food Safety: Building a Responsible and Sustainable Chain in Ukraine" was very well received with more than 100 attendees. It was our great pleasure to organise it together with GMP+ International and the Interregional Union of Poultry and Feed Producers of Ukraine.

Last but not least, Donau Soja contributed to the development of the National Action Plan for the Soya sector in Moldova, which was organised by Donau Soja as part of an EU-funded project. It is aimed at increasing the competitiveness of the agri-food sector with support from the Austrian Development Agency ADA, which remains Donau Soja's reliable partner in the region.

Having completed our seventh year, Donau Soja remains full of passion and true commitment to our mission and 286 members from 25 countries.

**Donau Soja Board, Presidium,
Advisory Board, and the Scientific
Advisory Board**

The Donau Soja Board, Presidium, Advisory Board, and the Scientific Advisory Board are the strategic bodies of the Donau Soja Organisation. Learn more about their roles and our governance structure on page 11.

A SUSTAINABLE, SAFE AND EUROPEAN PROTEIN SUPPLY

Donau Soja represents a concerted effort to apply methods used in the private sector in pursuit of the public interest and for the common good. Another important aspect for us is that we have always considered ourselves to be a truly European organisation working tirelessly for the benefit of European consumers. Not for the EU alone, but for the people of Europe as a whole. One of the goals of Donau Soja is, therefore, to re-establish agricultural relationships between Western and Eastern Europe, which were broken off for 40 years, and to rebuild human relations. These relations within Europe, the shared commitment to the use of soya, help us reconnect our agricultural systems. This is why Donau Soja is so important, because so many relationships have been created between people who would not otherwise have met.

ABOUT DONAU SOJA

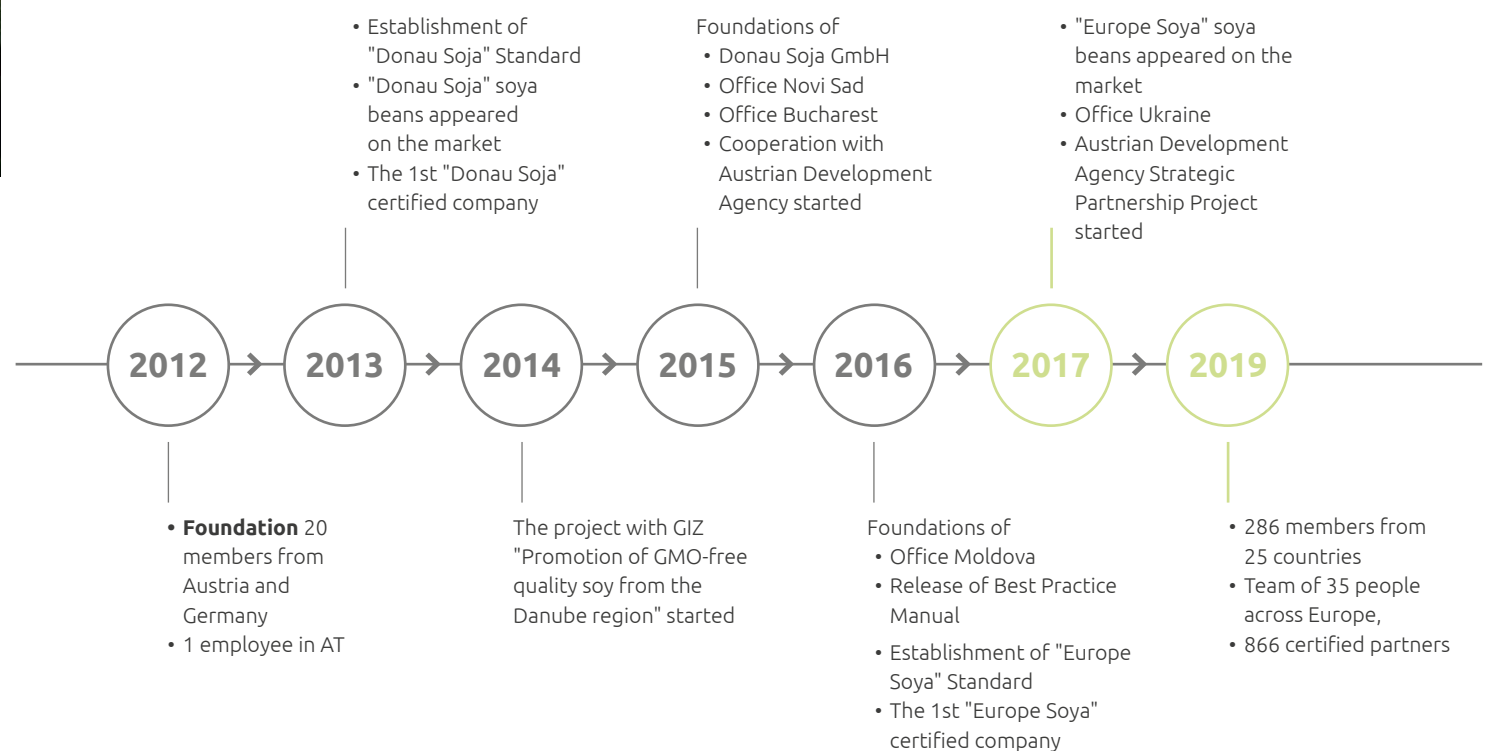
ABOUT DONAU SOJA

Donau Soja is an international, not-for-profit, multi-stakeholder, value-chain, membership-based organisation founded in 2012, promoting a non-GM, sustainable protein supply originating in Europe. It is based in Vienna, with regional offices in Serbia, Ukraine and Moldova. With more than 286 members in 25 countries, 866 certified partners and with the support of 19 European governments, we share a common vision and goals. Donau Soja facilitates the protein transition process in Europe by promoting non-GM soya production and local supply chains in European countries.

Prominent European institutions and organisations support this ambitious initiative. Our 286 members include food retailers, large agricultural traders, animal feed producers, oil mills and numerous processors, as well as environmental organisations such as Greenpeace and the WWF. This broad membership base is essential to the Donau Soja mission. The

initiative also enjoys broad support from the policy community: 15 European governments have supported the Donau Soja Declaration and 19 governments the Europe Soya Declaration. They recognise the need for added value in the Danube region, and the need to bolster an independent European supply of plant protein. Our activities make a valuable contribution to ensuring food security and developing sustainable supply chains throughout the continent. Sustainability, non-GM farming and European origin are assured. Over the past seven years, we have succeeded in creating and successfully launching our own quality standards Donau Soja, Europe Soya and Non-GM Danube Region. We have grown from 20 members of the Association in Austria and Germany to a pan-European organisation, whose members represent 25 countries of the European continent (including the EU). The activities of Donau Soja are supported by the Austrian Development Agency (ADA).

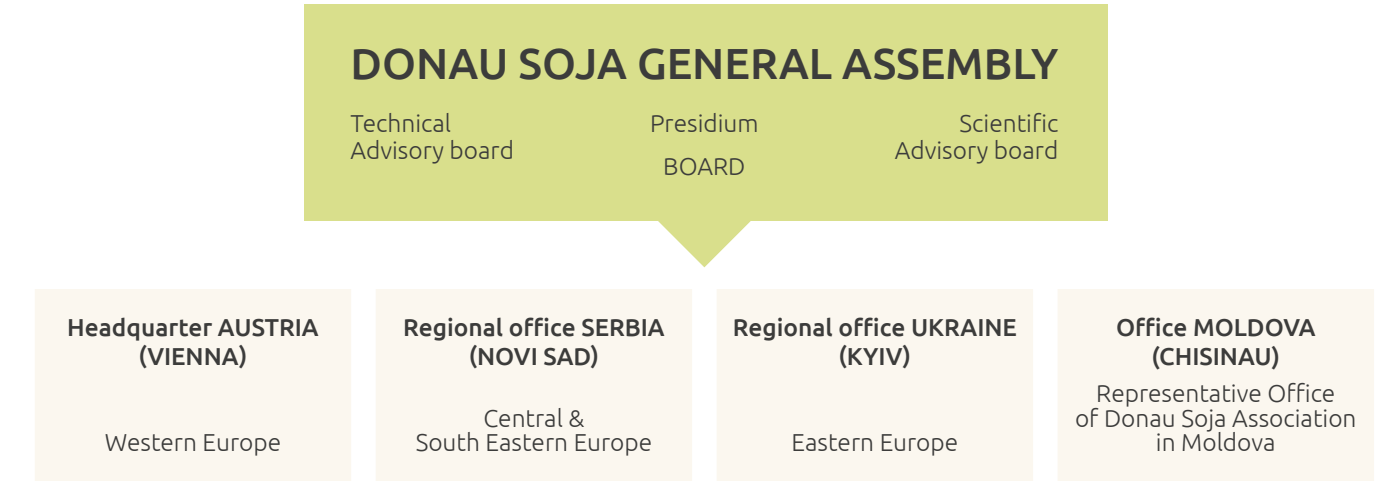
DONAU SOJA DEVELOPMENT



ORGANISATION STRUCTURE



DONAU SOJA ASSOCIATION • Multistakeholder • Value Chain Organisation



Supporting our members and certified partners in gaining access to the market and promoting them on the market as reliable partners. Regional development of sustainable non-GM soya production.

DONAU SOJA MEMBERS						
Input Providers	Agricultural Soya Producer	Agricultural Traders and Collectors	Primary Processors	Feed Producers	Food Producers, Animal based	Food Producers, Plant based
40	17	31	27	31	39	11
Certification Bodies	Food Retailers	NGOs, Associations, Unions	Research & Development	Government & Administration	Non-Soya- Business	
5	15	38	13	7	7	

The distribution of Donau Soja members across the value chain

ORGANISATION STRUCTURE OF DONAU SOJA

Donau Soja Organisation consists of a Vienna- based not-for-profit association with a Vienna based limited non profit company and subsidiaries and offices in Moldova, Serbia and Ukraine. This structure has proved to be a most effective vehicle for combining our struggle for protein transition with our activities on the market.

HOW WE FUNCTION

The statutes are our constitution. Natural and legal persons may become our members, if they share our vision of protein transition. The General Assembly is the annual meeting of the members. At the General Assembly, Donau Soja members elect the Board, and the Presidium, discuss and decide on strategically important matters. The Board meets six times a year and serves as the Association’s management body within the meaning of the Austrian Law on Associations.

PLURALITY MATTERS

To ensure equal representation of interests, the Board is composed of representatives of each stakeholder group along the soya value chain. In addition to the Board, the Donau Soja Presidium serves as guardian of the Donau Soja guidelines, ensuring compliance with the Donau Soja or Europe Soya standards. These bodies are supported by the Donau Soja Advisory Boards consisting of representatives of businesses, civil society and science. Moreover, as appropriate, Donau Soja initiates

working groups to facilitate the dialogue between stakeholder groups on specific topics. Stakeholders can engage with us by becoming members, participating in the association’s bodies, the regional and technical dialogues, or by giving feedback to our standards through public consultations.

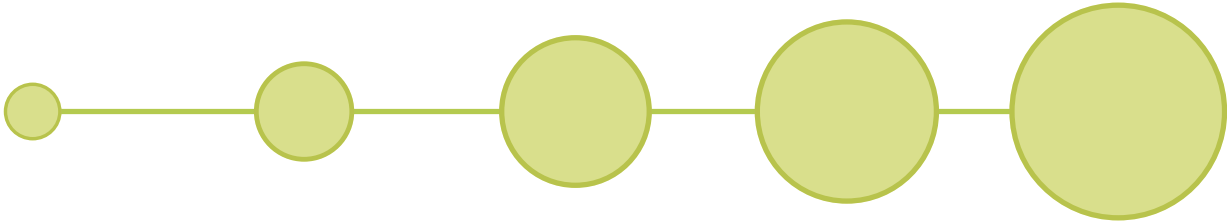
ADVOCATING THE PROTEIN TRANSITION

Since our founding year of 2012, Donau Soja has organised about two dozen industry meetings, networking events and congresses in Europe, with thousands of participants in total, complemented by numerous events in the regions. The highly valued support of our members ensures that Donau Soja is completely independent. Our independence is an important basis for our social commitment. The Donau Soja and Europe Soja Declarations, which have been supported by 19 governments, promote, inter alia, the achievement of the United Nations Sustainable Development Goals for sustainable development through European soya cultivation.

Years

2012	2014	2016	2018	2019
25	170	254	266	286

Members



Development in the number of Donau Soja Members

Donau Soja Organization is the holder of the “Donau Soja”, “Europe Soya” and “Non-GM Danube Region” voluntary quality standards.





DONAU SOJA: INSPIRED BY CHANGE TO DRIVE CHANGE

Donau Soja promotes sustainable and environmentally responsible practices along the value chain of cultivation and processing of high-quality non-GM soya products in the Danube Region and throughout Europe



HOW WE EAT DETERMINES,
TO A CONSIDERABLE EXTENT,
HOW THE WORLD IS USED

Wendell Berry

BACKGROUND

We have been witnessing a global imbalance in the protein and nitrogen cycle, with disastrous effects to climate and biodiversity. The EU and China, the world's largest consumers of soya, consume huge quantities of soya from South and North America, and are thus collectively responsible for the continuing deforestation of South America and other harmful land use change resulting in increased CO₂ emissions from soya production. In many countries throughout South and North America, soya accounts for 30% to 77% of the total acreage, which is far too high. In Europe on the other hand, our agriculture is

practically devoid of legumes, in the EU only about 4% of the cropland is planted with legumes. Nitrogen fertiliser, made from fossil fuel, and soya are imported in huge quantities.

On the other hand, many regions of Europe have favourable conditions for the production of soya in value chains close to the consumer. Market demand from consumers for locally produced non-GM soya beans used as food or feed is strong and growing in such areas as food and feed for pets, fish and farm animals.

OUR STORY

It is in response to these acute challenges and exciting opportunities that we founded Donau Soja in 2012 as an association bringing together thousands of soya market participants including soya farmers, processors, seed companies, input providers, R&D institutions, and NGOs from the Danube region, all committed to promoting sustainable soya production practices at each link of the value chain as the more environmentally responsible choice.

This history of our creation is very much a personal story for our founder, chairman and managing director, Mr Matthias Krön.

At age 20, he was studying in Taiwan learning Chinese with no background in agriculture. That's when he often had sweet soya milk for breakfast like many people in Asia and enjoyed it very much.

At 25 he joined Mona, a daughter company of a small dairy cooperative in Burgenland in the very east of Austria. While many Austrian cows feed on grass in the Alps, the cows in that flat part of Austria were largely fed grain and soya to obtain milk. That's when young Matthias realised that the cow in this case was converting protein-rich crops to milk, crops which humans could also consume directly. You could go straight from plants to milk and see the cow as a detour to milk, as Mr Krön puts

it. Over time, Matthias transformed Mona from a dairy company to a plant milk company. It is now the second largest producer of its kind in Europe.

This journey of change made Matthias aware of what a unique product the small bean is, with its numerous and diverse applications. Apart from its use for human consumption in a variety of forms from oil to milk to tofu, soybean meal obtained from it is a key protein-rich ingredient in most animal feed diets.

The lesson Matthias learned was that change is possible and can be both profitable and exciting when you embrace it. He decided to leave his job as CEO of a successful company to find out if positive change could be effected in the wider European environment. From 20 members, we have grown to nearly 300, starting out in Austria we have become a truly European organisation. Soya production in Europe has doubled to nearly 10 million tons.

Since its inception in 2012, Donau Soja has brought together thousands of soya farmers and processors from the Danube soybean-growing region.

We are confident that our history is only just beginning. Change is the DNA of Donau Soja, change for our future, our kids, and the future of our businesses.

OUR GOALS

VISION

A Sustainable, Safe and European Protein Supply



To be a widely recognized and respected service oriented multi-stakeholder organization in the protein, grain legumes and soya agri-food area with a diverse membership, including farmers and leaders from across the value chain

Donau Soja believes in the following organizational goals to achieve its Vision and Mission and support the European Protein Transition:



To create value for members and partners by reinforcing Donau Soja’s standards as the leading and most widely used standards for sustainable and non-GM soya in Europe

MISSION

Donau Soja supports its partners and members in progressing change to address social, environmental and economic challenges in soya production and consumption. This will increase efficiency, fairness and sustainability in European food and feed protein value chains



To serve all parts of the value chain by facilitating access to knowledge and technology for the production, processing and use of European-grown soya beans and other grain legumes



To support good governance and practices that respect and advance human rights, business integrity, gender equality, and social progress



To promote wider agri-business and consumer awareness leading to increased market value for European-grown soya and other grain legumes in local, regional and international value chains



To be a respected member of the relevant agricultural and environmental policy communities actively contributing to agricultural and environmental policy development



To be a leading actor in relevant European research and innovation efforts encouraging public research investment that supports the European Protein Transition



To invest in its people and be a great employer for a diverse high-performance staff



To operate autonomously serving its members and partners using excellent, standardized and efficient management and administrative procedures



To operate sustainably by using resource-conserving goods, services and processes.



DONAU SOJA CONTRIBUTION TO SUSTAINABLE DEVELOPMENT GOALS

The Sustainable Development Goals are part of Resolution 70/1 of the United Nations General Assembly in 2015: Transforming our World: the 2030 Agenda for Sustainable Development (Agenda 2030). It is result of a UN-led process involved its 193 Member States and global civil society. Agenda 2030 builds on previous global action programmes such as The Millennium Goals. An important feature of Agenda 2030 and the 17 SDGs is the focus on local action and partnership.

Protein production and use is at the nexus of a wide range of global challenges related to agriculture, food and land use and thus an essential consideration for Agenda 2030. Due to the connection with nitrogen, how we obtain and use plant protein is the major determinant of mankind's impact on the global nitrogen cycle. The nitrogen cycle is the most exceeded planetary boundary and comparable to the carbon cycle in its relevance to sustainable development. In addition, the choices we make for sourcing and using protein have a huge influence of the demands on our agricultural systems and resources, and thus on agricultural expansion and land use change. Against that background, the overall goal of Donau Soja is a sustainable supply and use of protein in Europe, especially through the development of soy production within sustainable cropping systems.

Against this background, and as a membership-based organisation with more than 280 members from the agri-food sector, Donau Soja's work to promote sustainable sourcing and use of protein in Europe is fundamentally linked to sustainable development, and this Agenda 2030. Donau Soja considers the development of soy as a catalyst for change in wider cropping systems and therefore relates to the Sustainable Development Goals

beyond the direct impacts of soy production. A holistic value-chain approach combines increased production capacity with increasing value for the produce, supported by long-term capacity building and improved governance and connections to the global knowledge-based economy. Because the soybean is a nitrogen-fixing legume crop, its introduction into cropping systems results in a general improvement in the soil-crop system. As the world's most important protein crop, soy is a global driver and enabler the agricultural systems.

The soybean is particularly well-suited to production in south-eastern Europe. The development of soy-based value chains in these countries is seen by Donau Soja as a catalyst for wider agricultural development in these post-Soviet economies where rural poverty is particularly prevalent. This is pursued through four interconnected activities:

- 1. Innovation in agricultural systems: supporting innovation in agricultural practices, especially through capacity building in the farming sector.
- 2. Development of high-quality value chains: increasing the value of agricultural produce through the development of corporate social responsibility in value chains and providing access to high value markets.
- 3. Investment in people and research: increasing long-term capacity through investment in education and research.
- 4. Governance and policy development.



Donau Soja is represented by official representations of regional offices in all the main European soya production regions. An active regional representation and deep integration into regional aspects give us the opportunity to actively interact with markets that produce 82% of the pan-European volume of non-GM soya beans.

A holistic value-chain approach combines increased production capacity with increasing value for the produce, supported by a long-term capacity building and improved governance and connections to the global knowledge-based economy. Donau Soja considers the development of soy as a catalyst for change in wider cropping systems and therefore relates to the Sustainable Development Goals beyond the direct impacts of soy production.



Share of non-GM Soya production in Europe covered by each Donau Soja regional office
Total coverage 82%



DONAU SOJA PROTEIN STRATEGY

THE EUROPEAN PROTEIN CHALLENGE

Due to suitable climate and soils, many European farmers are remarkably good at growing cereal crops such as wheat, barley and maize. This supports high levels of production of carbohydrate-rich grains used mostly to feed livestock. This productive agricultural system depends on two major inputs into European Union farms: about 11 million tonnes of synthetic nitrogen fertilizer, and the high-protein meal from about 36 million tonnes of soya beans to provide protein supplement for feeding animals. The increase in plant protein requirements over

the last 60 years in Europe is due largely to the increased consumption and production of meat and dairy products. After China, the European Union is now the second largest importer of soy from South America. While the European Union's agricultural system as a whole is 71% self-sufficient in tradable plant protein, 86% of the plant protein imported to meet the 29% deficit is soy. This protein deficit is a fundamental challenge to the resilience, acceptance and performance of our agri-food systems. This is Europe's Protein Challenge.

THE CASE FOR A EUROPEAN PROTEIN TRANSITION

Many European farming systems are not balanced with respect to the nitrogen cycle. Carbohydrate-rich cereal crops and oil-rich rapeseed grow very well over much of Europe and consequently many farmers specialize in growing them. World-wide, protein-rich grain legumes, which can bring agronomic and environmental benefits in crop rotations, account for about 14% of the global arable area but there is great variation in the extent of their use. Soybean is grown in intensive monocultures

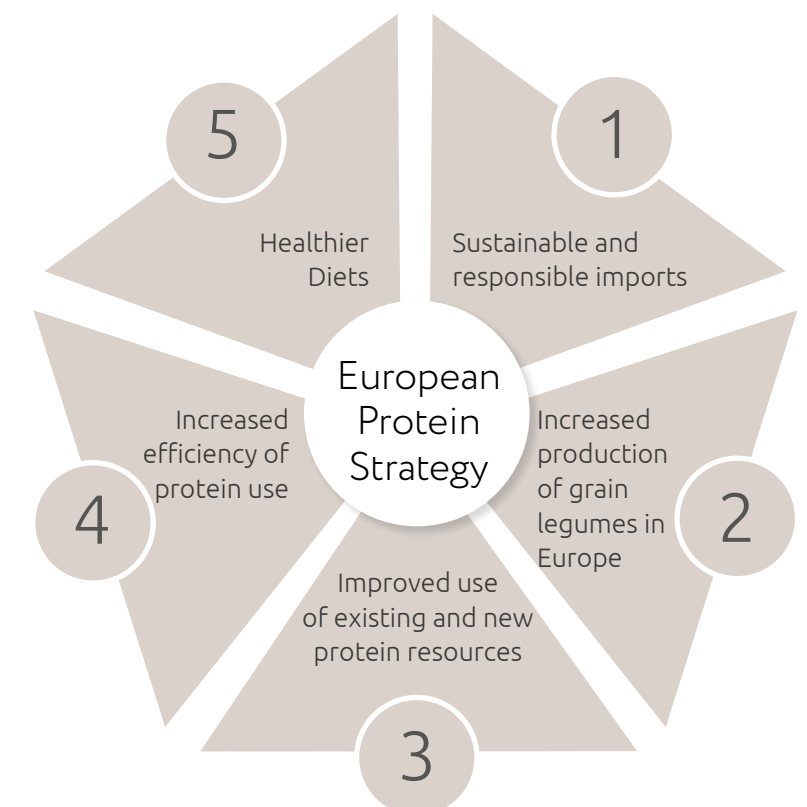
in the major exporting countries in South America where it commonly accounts for more than half of the cropped area. In contrast, grain legumes account for only 2 to 3% of the arable area of the European Union, mostly soybean, pea and faba bean in that order. The combination of this European cropping pattern with few grain legumes and the high consumption and production of livestock products is the basic reason why we have a protein deficit in Europe.



Building on the Vision and Mission, Donau Soja described a European Protein Transition towards a sustainable, safe and European protein supply.

ADDRESSING THE PROTEIN CHALLENGE

Addressing the Protein Challenge and delivering the Protein Transition requires a holistic approach. The system change needed can be regarded as a set of five pillars which are:



1 Sustainable and responsible imports
Even with significant change, Europe is likely to still need plant protein imported from traditional exporting regions. We need to switch to certified produce from production regions and systems that are thoroughly validated against high environmental and social standards. The Protein Challenge is global. It is important that Europe leads change. In particular, collaboration with China is required to achieve a world-wide move towards more sustainable production of protein. We need to use standards for responsible production and trade. In this, Europe and China together can drive global change in plant protein production and use.

2 Increased production of grain legumes in Europe
Increasing grain legume production in Europe will bring a wide range of benefits and reduce the protein deficit. Especially in Europe, grain legumes increase diversity in cropping and support pollinating insects. They don't need nitrogen fertiliser because they fix their own nitrogen from the air. They counter the build-up of disease, pests and weeds in cereal-based crop rotations because they are biologically very different to cereals. The current low use of legumes means that we forfeit many of these agronomic benefits and associated environmental advantages. The general lack of cropping diversity is associated with stagnation in crop yields or higher costs as our main crops succumb to increased levels of weeds, pests and diseases. European farmers can respond to an increased demand for plant protein produced in Europe to high environmental and social standards. This meets the growing demand for non-GM products and can support regional/local value chains. The industry can collectively set standards for all protein sources and signal support to sustainable production. In particular, there is potential to improve cropping systems in central and eastern Europe using grain legumes. This means that trans-Atlantic trade would be partly replaced by east-to-west sourcing within Europe contributing to European cohesion, regional development, and rural development in now deprived rural areas. Also there is potential in western Europe to increase grain legume production without displacing cereal and oilseed production due to the yield benefits in crop rotations.

3 Improved use of existing and new protein resources
Plants are by far the most important primary source of protein. While co-products such as rapeseed meal, sunflower seed meal and distillers dried grains are already used by the feed industry, there remain opportunities for better use of agri-food residues in livestock feeding. Also, our grassland-based production systems could in many areas of Europe better use grass and high-protein grassland species such as clover (which is a legume) to reduce soy use. Forage crops such as alfalfa are other protein sources. There are also potential opportunities in for example algae culture.

4 Increased efficiency of protein use
Better matching of livestock diets to livestock protein requirements saves protein and reduces pollution by reducing the excretion of nitrogen compounds. This can make an important contribution to farmers' compliance with nutrient balance-based fertiliser management systems. Protein is usually an expensive component of feeds and so more precise feeding can also reduce production costs.

5 Healthier and more sustainable diets
The size of the European Protein Challenge is determined largely by the quantity of livestock products that is consumed and produced. Human diets that rely more on plant protein, especially pulses and soy, are generally healthier and more sustainable compared to the typical consumer diet in the EU today. While meat, milk and eggs provide us with high-quality protein, a large proportion of the population consumes more meat and dairy products than is recommended for a healthy diet. This has far-reaching consequences because a large livestock sector is required. Most of the plant protein-nitrogen consumed by these livestock is excreted and now causes a large proportion of the water and air pollution from agriculture. The impacts of this on the environment are particularly large where livestock production is regionally concentrated. Moderation in the consumption of animal products with a corresponding reduction in their production would improve the performance of our agri-food system in terms of human health, the environment, and land use.

ABOUT THE DEVELOPMENT OF THIS STRATEGY

The overall goal of Donau Soja is safe, sustainable and European protein supply. For this, the development of soy production in Europe is part of a wider change in how we produce and use protein. The far-reaching consequences of protein production and use are now the subject of public debate. Building on the Europe Soy Declaration, Donau Soja has developed this strategy document to make a comprehensive contribution to the public debate on behalf of all the members of Donau Soja. The foundation of the strategy is a holistic and science-based understanding of the role of protein in the sustainable development of agri-food systems. The Donau Soja Science Advisory Board was consulted on the first draft before it was considered by the Donau Soja Board. With the support of the Board, a revised draft was sent to all members who were invited to comment. All comments received were reflected in finalising the document. The strategy was unanimously passed by the General Assembly of Donau Soja in April 2018. It is therefore a powerful statement from the agri-food sector as represented by Donau Soja of a commitment to support profound change.

CONCLUSION

The Protein Transition depends on consensus. EU member states, businesses, and public-good organisation such as Donau Soja must cooperate to foster consensus and bring the components of change together. A halving of the European Union's soy imports from the peak level of about 40 million tonnes (soybean equivalent) in the years 2003 to 2008 is a realistic goal for 2030. If that is achieved, European agriculture will be more resilient; many Europeans will be healthier; the local, regional and global environment will benefit; and rural economies especially in eastern and south-eastern Europe will be more prosperous.



The Donau Soja Protein Strategy for Europe.

PARTICIPATION IN POLICY FORMATION

The Vision of Donau Soja is a Sustainable, Safe and European Protein Supply. After China, the European Union is now the second largest importer of soya from South America. This protein deficit is a fundamental challenge to the resilience, acceptance and performance of our agri-food systems, which should be addressed in the spirit of the United Nations Sustainable Development Goals. To facilitate the protein transition, Donau Soja speaks at conferences and advocates it to stakeholders and media all over Europe. We work with governments and authorities to create a better regulatory environment at national, international and European-Union levels. A horizontal effort in numerous policy fields is needed, e.g. the European Common Agricultural Policy or policies against land-use change and deforestation. In this sense, the 2018 Donau Soja Protein Strategy for Europe is a comprehensive contribution to the public debate providing decision makers with practical solutions.

DONAU SOJA ASSOCIATION HAS BROAD POLITICAL SUPPORT

Several European governments have signed the Donau Soja Declaration between 2013 and 2015. They recognise the need to promote local soya production in the Danube region and strengthen an independent European supply of protein. In July 2017, the Europe Soya Declaration, aimed at boosting soybean cultivation in Europe was signed by 14 EU agriculture ministers bringing it ever closer to reaching the UN Sustainable Development Goals.



Relevant Sustainable Development Goals



The successful achievement of sustainable development goals is impossible without strong and all-encompassing partnerships on international and national levels between government, business and society. In this context, the Association directs efforts towards forming national and regional policy promoting economic growth without harming the environment.

INTERNATIONAL ASPECT

COLLABORATIVE SOY INITIATIVE

convened by RTRS



International Cooperation: The Collaborative Soy Initiative (CSI)

The Collaborative Soy Initiative (CSI) was launched in 2019 to build a neutral, credible, transparent and inclusive soya community. The collaboration framework comprises more than 30 stakeholders, ranging from civil society institutions, NGOs, producers, roundtables, standard setters, private companies and industrial associations. The initiative’s focus lies on communications and actions that foster synergies between stakeholders.

Donau Soja joined the CSI as a Steering Group Member in August 2019. Our first joint webinar took place in September 2019. Over 130 companies and organisations registered to learn more about “Deforestation and Conversion-Free Soy: How to Collaborate Letter to Make It Happen?”. During a presentation by the International Union for Conservation of Nature (IUCN, the Netherlands) useful insights were shared showing companies further downstream in the supply chain, such as retailers, how they can have a direct impact on specific soya producing regions. In particular, the Protein Partnership Programme targets disadvantaged regions outside the European Union, such as Moldova, Ukraine, Serbia or Bosnia & Herzegovina, and helps increase volumes of sustainably produced soya beans in Europe.

Further information available on <https://thecollaborativesoyinitiative.info/>



Amsterdam Declaration Partnership (ADP)

The Amsterdam Declaration Partnership (ADP) is an international multi-stakeholder supply-chain initiative, aimed towards deforestation-free sustainable commodities (especially soya, cocoa, palm oil and rubber). The initiative is based on the Amsterdam Declarations

- Amsterdam Declaration on Deforestation
- Amsterdam Declaration on Sustainable Palm Oil

which have been signed by seven European countries: Denmark, France, Germany, Italy, Netherlands, Norway, and the United Kingdom.

Among the ADP countries, there are 16 companies with a 100% responsible soya commitment and 24 companies with a ‘no-deforestation’ commitment (WWF Soy Scorecard 2016). To support such commitments, the ADP facilitates and supports the development of European National Soya Initiatives (ENSI). National sustainable soya initiatives have been developed by a range of European conveners to help soya users transition to sustainable soya supply chains. While some have been established and working towards this goal for several years (such as the Dutch and Norwegian initiatives), others are relatively recent, such as those of Denmark and the UK. Under the umbrella of the Amsterdam Declaration Partnership (and its member governments), these conveners have come together to explore ways in which they can support their members and better collaborate to create a stronger impact while generating meaningful market signals. The ADP promotes sustainably produced soya, in particular through compliance with a certification standard which have cut-off dates for deforestation such as Donau Soja/Europe Soya. Donau Soja has contributed to the Amsterdam Declaration Partnership as a member of the soya working group since the beginning of 2019.

AUSTRIA

In Austria, the dialogue with various stakeholder groups was intensified during 2019, e.g. with the Austrian Farmers' Federation and Agrarmarkt Austria, Austria's regulatory agency in the field of agricultural policy. Donau Soja's prominent contribution to identifying the priorities has been acknowledged in the programme of Austria's newly elected government. Moreover, Donau Soja has also been contributing to various conferences and symposia – e.g. in Vienna, Budapest, Sweden, Netherlands, Belgium, and the United Kingdom.

GERMANY

Donau Soja was very active in the framework of the 84th International Green Week which traditionally took place in Berlin. The international food, agriculture, and gardening fair welcomes some 400,000 visitors every year. Donau Soja used this opportunity to meet with the agricultural ministers of Moldova and Romania, the Secretary of State of Croatia as well as with high-level government representatives of the German state of Baden-Württemberg. Donau Soja and the government leaders share a common vision for a sustainable soya supply to the European market originating in Europe.

SWITZERLAND

In January 2019, Switzerland signed the Europe Soya Declaration. The Europe Soya Declaration aims to boost soya bean cultivation in Europe, bringing it closer to reaching the UN Sustainable Development Goals, especially as regards improving the world's food supply and using natural resources sustainably. The declaration was initiated by the Donau Soja Organisation and signed by 19 agricultural ministers: those of Germany, Hungary, the Netherlands, Italy, France, Austria, Romania, Finland, Greece, Luxemburg, Poland, Croatia, Slovakia, and Slovenia, as well as Kosovo, North Macedonia, Moldova, Montenegro and Switzerland.

MOLDOVA

Donau Soja is closely cooperating with the Ministry of Agriculture, Regional Development and Environment. In February 2019, a round table with soya meal producers and consumers was organised by Donau Soja in partnership with the Ministry and the Association of Poultry Farms of Moldova. The main objective of the round table was to assess the potential of the soya meal market in Moldova and identify priorities for expanding sales to the European market.

CROATIA

Donau Soja has been closely collaborating with the Ministry of Agriculture of Croatia and the Austrian Embassy to establish an enabling regulatory environment for non-GM certification and labelling in Croatia. Joint meetings and presentations have been organised at the Food Safety Conference in Opatija, Green Week in Berlin and other events.

Donau Soja organised a press conference in the Parliament building of BiH in Sarajevo on the occasion of the first non-GM certified and labelled products in the Region according to Non-GM Danube Region Standard. Representatives of three Ministries (Minister of Foreign Trade and Economic Affairs, Minister of Agriculture of the Republic of Serbia and Federal Ministry of Agriculture), Food Safety Agency, and non-GM certified companies and Donau Soja members reiterated their commitment to non-gm certification and labelling to support local producers and processors, while increasing market transparency and enabling consumers to choose local non-GM-labelled food.

Donau Soja takes an active part in developing Ukraine's regulatory framework by creating favourable conditions for agribusiness, advocating organic production, expanding the geography and scope of foreign trade operations and promoting a stringent regulatory environment for the use of GMOs in Ukraine. Together with our partners, we prominently contribute to the development of the local market, and work to improve the sectoral and export competitiveness of Ukrainian soybean farming and processing. Donau Soja has actively participated in discussions of economic cooperation between Austria and Ukraine, in particular as regards the proper regulation of GMOs in the case of soya beans.

Donau Soja Association actively participated in discussion of economic cooperation between Austria and Ukraine, particularly discussing the issue of gm turnover proper regulation in Ukraine on example of soya beans.

BOSNIA AND HERZEGOVINA

UKRAINE

CAPACITY BUILDING IN THE FARMER SECTOR

In 2019, Donau Soja continued actively supporting soybean growers and processors, consultants and input suppliers. With the support of members and other partners, field demonstrations, field days and other events organised in Germany, Austria, Hungary, Croatia, Serbia, Romania, Moldova and Ukraine to promote agricultural research. A total of 220 plots were sown with soybean varieties treated with inoculants, herbicides and microfertilisers. Agricultural machinery, such as harrows and hoes, were displayed in Serbia and Ukraine

to advertise advanced methods of reduced herbicide use in farming. These demonstration platforms were visited during 11 Donau Soja field days by more than 1,100 farming professionals. At its 9 seminars, Donau Soja educated some 260 farmers and interested persons on soybean farming techniques, focusing on variety selection, seeding, inoculation, chemical and mechanical weed control, as well as quality aspect, e.g. avoiding GMO contamination.

Relevant UN Sustainable Development Goals



Since its inception in 2012, dissemination of best practices in soybean cropping has played a vital role in Donau Soja's efforts aimed at improving farming practices. By introducing soya into crop rotation and promoting sustainable cropping practices among farmers, it is possible to reduce the pressure of agriculture on soil, water and other natural resources. Many positive effects for soil biota can result from diverse crop rotation, reduced application of synthetic nitrogen fertilisers, balanced pesticide application and measures aimed at mitigating the accumulation of pathogens. Importantly, in organic farming legumes serve as a major source of nitrogen

alongside manure. By following advanced crop rotation practices and increasing the acreage dedicated to soya beans, farmers can improve the condition of the soil and, consequently, increase crop yield in the same areas.

That is why Donau Soja provides practical training materials (Best Practice Manuals), organises field days and training activities for farmers to promote sustainable soya production practices. Particular attention is paid to cultivation in challenging climatic conditions, moisture deficit, selection of varieties and tillage technologies depending on the region.

ACTIVITIES ORIENTED TOWARDS KNOWLEDGE TRANSFER



Best practice manual

This manual assembles best agricultural practices for the cultivation of soya beans in the Danube region.

The comprehensive manual by Serbian authors of the Institute of Field and Vegetable Crops, NSSEME, was updated through a stakeholder consultation process in 2015. As part of this process, soya experts from Austria and Germany, representatives of NGOs and agrochemical companies made valuable contributions while Donau Soja made recommendations to promote sustainable consumption of plant-based protection products. The international edition of the Donau Soja Best Practice Manual has been translated into Serbian, Romanian, Russian and adapted to the local conditions in Serbia and Moldova.

Field days

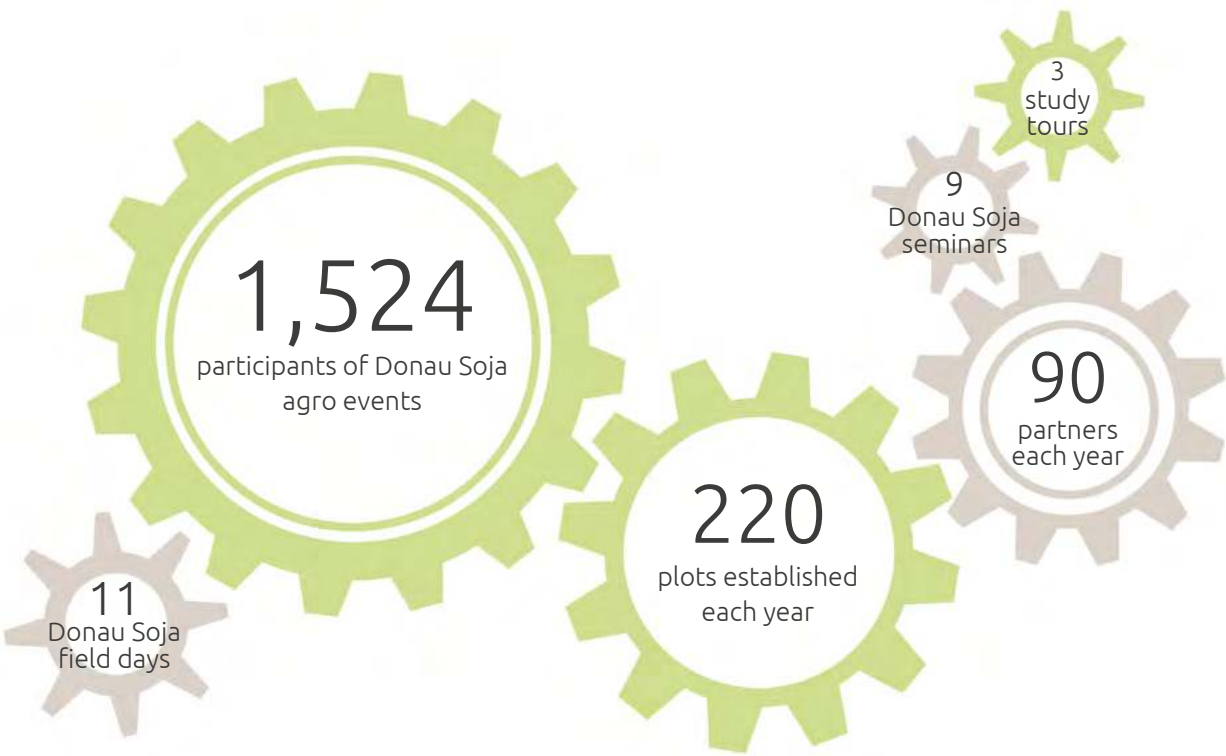
Together with our partners, we organise field demonstrations and field days to support soya bean producers.

Since 2014, the Donau Soja Organisation and its individual members have been working tirelessly to promote the best practices of sustainable soya production all over Europe. Each year, Donau Soja organises field demonstrations and Field Day events in order to test, analyse and transfer new knowledge and state-of the-art production technologies to soybean farmers. Donau Soja Field Day events add value for everyone involved in improving sustainable soybean production and protein supply from Europe and for Europe. It is a unique place to meet stakeholders from the whole value chain of soybean production in Europe and the region and an opportunity to discuss current developments and future trends in the soybean market.

Seminars and workshops

Donau Soja activities provide theoretical, practical, skills-based education in sustainable non-GM soya bean production.

To improve the competitiveness of European farmers on soya markets, Donau Soja organised a series of workshops during 2019 to support producers in gaining access to information regarding successful non-GM soya cultivation practices. Besides technological aspects, farmers also had a chance to find out about effective financial instruments and agricultural insurance from international experts. In a relaxed atmosphere, the farmers could ask any questions they had, in particular how to detect GMOs in their crops, how to select varieties and tillage systems suitable for the conditions of their individual farms and other relevant issues.



GENDER DIMENSION AND LABOUR CONDITIONS



Gender equality mainstreaming is of great importance to Donau Soja. Our team is committed to integrating the gender dimension into designing and implementing our activities. While most of Donau Soja's activities and capacity-building initiatives are related to agriculture and soybean production, which are traditionally male topics, 23% of the total number of registered participants in 2019 were women. Various initiatives and projects have been launched to promote and encourage women to be active in agriculture and soybean production and processing, e.g. social media campaigns, mentoring programmes and "Best Young Agronomist. Lady" competition. In 2019, Donau Soja set up an internal gender equality team and four focal point positions to monitor and promote gender equality mainstreaming in daily operations at all Donau Soja offices. As a sign of its commitment to this agenda, Donau Soja has conducted a Gender Audit whose recommendations are now being implemented to improve gender balance while acknowledging the high representation of women in management (83%) and staff (74%) already achieved.

GENDER EQUALITY IS AN IMPORTANT PRINCIPLE OF DONAU SOJA. THE ASSOCIATION PROACTIVELY PROMOTES EQUAL OPPORTUNITIES FOR WOMEN AND MEN

Relevant UN Sustainable Development Goals



Social rights and working conditions, as well as gender equality, go beyond human rights and extend to the right to peace, prosperity and sustainable development. Provision of equal access to agrarian education,

participation in decision making and career opportunities for women promote sustainable economic development that benefit society at large.

DONAU SOJA ORGANISATION ASSURING WITH COMPLIANCE WITH HUMAN AND LABOUR RIGHTS AND SAFE WORKING CONDITIONS

Donau Soja-certified soya bean production complies with both EU-wide and international labour and social standards. These include the following fundamental principles and labour rights:



Mentioned principles are described in Donau Soja/Europe Soya Standards and regularly checked by certification bodies during audits.

CERTIFIED DONAU SOJA & EUROPE SOYA BEANS

Europe grows 10 million tonnes of soya beans, of which about 8 million tonnes are non-GM.

At the close of the 2019 harvesting campaign, around 675,000 tonnes of Donau Soja & Europe Soya soya beans from eleven countries were stored at over 100 different primary collectors and soya processors. This makes Donau Soja & Europe Soya the leading sustainable soya standard setter in Europe. With 144,000 tonnes, Italy shows the largest stock, followed by Ukraine, Romania, Republic of Serbia and Austria. A large number of oil mills and other primary processors, such as toasters, are certified for the production of Donau Soja and Europe Soya products (such as meal, soya protein concentrate, cake, toasted beans, oil products and lecithin). They are able to offer high-quality soya products for feed and food use.



6.8% of European Soya production is under Donau Soja/Europe Soya certification



over **10,400** farmers



over **100** collectors in the system



866 certified partners



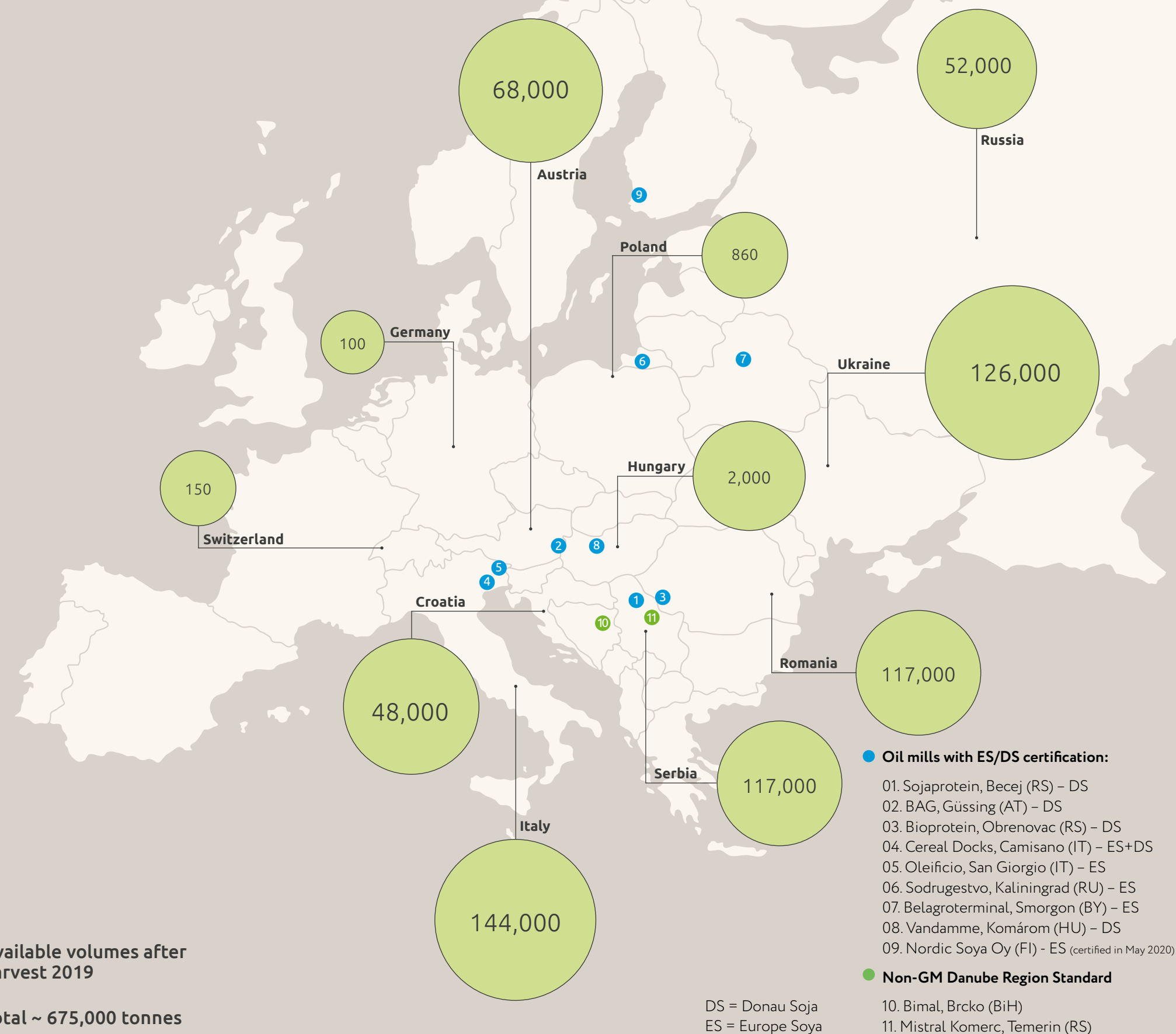
675,000 tonnes of certified Donau Soja/Europe Soya are available after harvest 2019



11 oil mills with Donau Soja/Europe Soya/Non-GM Danube Region Standard certification




Available volumes after harvest 2019

Total ~ 675,000 tonnes



OUR QUALITY STANDARDS AND LABELS



		
The DONAU SOJA STANDARD ensures that certified soya beans are:	The EUROPE SOYA STANDARD ensures that certified soya beans are:	The Non-GM Danube Region Standard
<ul style="list-style-type: none">• cultivated in the Danube region• non-GM• produced according to specific environmental standards, such as:<ul style="list-style-type: none">- no substances that are prohibited for use in the EU; by Rotterdam and Stockholm convention or WHO list 1a and 1b;- no desiccation before harvesting;- no land use change since 1st January 2008;• produced according to ILO social and labour standards• traceable as part of the IP (Identity Preservation) program	<ul style="list-style-type: none">• cultivated in Europe• non-GM• produced according to specific environmental standards, such as:<ul style="list-style-type: none">- no substances that are prohibited for use in the EU; by Rotterdam and Stockholm convention or WHO list 1a and 1b;- no desiccation before harvesting;- no land use change since 1st January 2008;• produced according to ILO social and labour standards• traceable as part of the IP (Identity Preservation) program	<ul style="list-style-type: none">• offers the possibility of a joint and transparent market of non-GM products and enables regional trade without barriers• provides the industry with the opportunity to regionally promote non-GM certified products, and thus adds value to the non-GM food sector in South East Europe• allows consumers to make an informed choice.• is recognized by Austrian and German non-GM production standards• ensures that GMO ingredients are not used throughout the entire production process (neither in feed nor in final product)

Relevant UN Sustainable Development Goals



The Donau Soja Organisation is the setter of the Donau Soja, Europe Soya and Non-GM Danube Region voluntary quality standards. The non-GM Danube Region standard is the first regional harmonised non-GM quality standard in South East Europe. It is the basis of a new food and feed certification and labelling programme featuring a unique quality label, Non-GMO Produced, provided by

Donau Soja and common to all markets in the region. The Donau Soja and Europe Soya Standards and Guidelines are essential standards for using the Donau Soja and Europe Soya logo and the quality label. These define the regions of origin of soya beans and include requirements for plant protection, non-GM production, traceability, sustainability and the inspection system.

DONAU SOJA/EUROPE SOYA: THREE-STAGED AUDITS SYSTEM

Donau Soja inspections and certification are carried out by independent external certification bodies, which are accredited in accordance to ISO/IEC 17065. So far 15 Certification bodies are accepted by Donau Soja

Organisation to conduct inspections and certifications. This is part of a three-staged inspection system that builds upon a risk-based inspection frequency.

1

Quality Assurance system

Self-monitoring within the companies and obligatory quality assurance schemes (at the stages of processing).

2

External, independent certification bodies for Donau Soja/Europe Soya certification

Independent certification bodies perform audits on-site and hand over valid Donau Soja certificates to complying companies only.


3

Donau Soja integrity audits

Additionally, and on a regular basis, Donau Soja Organisation performs integrity audits by trained staff or in cooperation with external certification bodies or external experts.


SUSTAINABILITY BENCHMARKING: DONAU SOJA AND EUROPE SOYA

Donau Soja and Europe Soya sustainable standards are recognised by the following associations:




Donau Soja/ Europe Soya is accepted by **The European Compound Feed Manufacturers' Federation** as one of 18 sustainable sourcing standards

Europe




UK Roundtable on Sustainable Soya assessed and recommends Donau Soja / Europe Soya as one of 10 sustainable soya sourcing standards

United Kingdom




Swiss Soy Network defines Donau Soja/ Europe Soya as one of 5 sustainable sourcing standards

Switzerland




Swedish Soy Dialogue accepts Donau Soja/ Europe Soya as one of 4 sustainable soya sourcing standards

Sweden




The International Union for Conservation of Nature recommends Donau Soja/ Europe Soya as one of 6 sustainable sourcing standards

The Netherlands




Thünen Institut Germany recommends Donau Soja/ Europe Soya as one of 6 sustainable soya sourcing standards

Germany




Greenpeace Austria rated Donau Soja as „reliable and sustainable“ product label

Austria




RELIABLE

Donau Soja stands for strictly controlled regional and non-GM soya, with individual criteria going beyond this. There is still room for improve - ment in pesticide use and crop rotation. Greenpeace rates Donau Soja as trustworthy.*



WWF Germany recommends Donau Soja/ Europe Soya as one of 4 sustainable sourcing standards

Germany



VLOG recognizes Donau Soja/ Europe Soya certification as **equivalent** to VLOG standard certification

Germany

* translated into English by Donau Soja

7 STEPS TO GET CERTIFIED



QUALITY MANAGEMENT

The quality management team at the headquarters in Vienna as well as in Novi Sad, Kyiv and Chisinau offices are responsible for the quality assurance of the Donau Soja and Europe Soya standard. The team manages the approval processes of new certification bodies (CB), conducts annual training courses for the staff of certification bodies, support CBs in new certifications, provides translated documents to CBs and certified partners. The integrity of the entire system and the compliance with our Donau Soja and Europe Soya requirements is regularly checked during our integrity audits at partners and certification bodies, witness audits and laboratory analysed of soya bean and soya products.

Internally, team members are involved in developing standards, new regulations and annexes to the standards, giving feedback for benchmarking, and support partners and members in case of certification-related questions. In 2019, the quality management team supported partners and certification bodies in generating around 675,000 tonnes of Donau Soja and Europe Soya-certified soya beans. Another remarkable achievement

is the acknowledgement received by the Donau Soja Organisation for DS/ES soya beans as being equivalent to the German VLOG standard for feed and compound feedstuffs. This means that VLOG-certified customers can buy those Donau Soja or Europe Soya certified products for their production as conforming to VLOG standard.

In the last fiscal year, the QM team provided useful input to help CBs identify inaccurate, missing or invalid certificates as well as inaccurate products. The QM team also contributed to the new annex "Requirements for Donau Soja/Europe Soya Produce with Restricted Geographic Origin".

The QM team also assisted the service provider in updating the IT database. A new checklist has been developed for storing, trading and processing; it has also been supplemented with a compliance guideline for CBs that will be used in future for enforcing compliance and imposing sanctions in case of nonconformity. The compliance guideline also sets sanction levels for soybean producers and animal farmers, e.g. egg farmers.

12



TRAININGS

01/2019 - 12/2019

107

trained inspection bodies staff

<

from 15

countries

15

inspection and certification bodies

<

2

Office Audits (AT und SI)

13

Witness Audits in Austria, Bosnia and Herzegovina, Croatia, Romania, Serbia and Ukraine

86

Supervisory checks (incl. check of harvest declarations)

15

Donau Soja approved certification bodies


Austria Bio Garantie GmbH/ agroVet GmbH (AT)
Aciter Inspection LLC (UA)
Bioinspekt d.o.o. (HR)
Bureau Veritas d.o.o. (SVN)
Control Union Certifications B.V. (NL)
CSQA Certificazioni S.R.L. (IT)
FoodChain ID Certification Ltd. (UK)
KIWA Agri Food (UK)
LACON GmbH Germany (DE)
Organic Control System d.o.o. (SRB)
Organic Standard Ltd. (UA)
ProCert Zertifizierungsstelle (CH)
QAL GmbH (DE)
SGS Austria (AT)
SLK GesmbH (AT)

AUSTRIA –CLIMATE FRIENDLY EGG PRODUCTION DUE TO DONAU SOJA CERTIFIED FEED

Austrian egg farmers are pioneers in climate protection. By using Donau Soja – certified soya feed exclusively, Austrian egg producers reduce their CO₂ emissions significantly and offer climate-friendly products.

In a study presented on World Egg Day 2019, Dr. Stefan Hörtenhuber, a scientist at the University of Natural Resources and Life Sciences, Vienna (BOKU) analysed the climate effects of the shift to Donau Soja in Austrian egg production. The study indicates that Austrian egg production causes 36% less CO₂ emissions compared to the Western European standard model. Austrian egg producers who rely on Donau Soja-certified feed avoid one kilogram of CO₂ per kilogram of egg. Almost two billion eggs are produced in Austria per year. Of those, 1.7 billion are Donau Soja-certified eggs. This adds up to 110,000 tonnes of Donau Soja eggs which are produced in Austria each year, thus avoiding almost 110,000 tons of CO₂ emissions per year.

Since 2013, practically all eggs sold through the Austrian food retail chains (with the exception of organic eggs) have been produced using Donau Soja-certified feed. This means that overseas soya is completely avoided in the feed. This creates added



ÖkR Franz Kirchweger (Chairman EZG-Frischei), DI Ferdinand Lembacher (General secretary Austrian Agricultural Chamber) and Matthias Krön (Chairman Donau Soja) presenting news on World Egg Day 2019

value for everyone - for soya farmers in Austria and the Danube region, who thus have a guaranteed purchase, and for the egg farmers, whose products are notably different from imported eggs.

Donau Soja appreciates its partnership with the Austrian egg industry. The conversion of the Austrian egg-farming industry to regionally produced Donau Soja-certified feed is seen as a great success for the whole sector by many farmers, industry and retailers.

“

Donau Soja reduces 110,000 tonnes of CO₂ emissions per year in Austrian egg production

1.7 billion eggs are Donau Soja certified

2 billion – total eggs production in Austria (per year)

PROTEIN PARTNERSHIP

PROGRAMME DESIGNED AS AN ALTERNATIVE TO CREDITS FROM OVERSEAS TO SUPPORT REGIONAL PRODUCTION OF SUSTAINABLE NON-GM SOYA IN EUROPE

The Protein Partnership Program targets disadvantaged regions outside the European Union, such as Moldova, Ukraine, Serbia or Bosnia & Herzegovina, and helps increase volumes of sustainably produced soya beans in Europe.

SUSTAINABLE SOY VOLUMES FOR EUROPE FROM EUROPE

Soya beans are the largest global source of plant-based protein, an important part of food production. The EU imports an equivalent of 35-40 million tonnes annually, sourcing significant amounts from areas where sensitive ecosystems like the Amazon rainforest and the Cerrado

savanna are under threat from deforestation. Donau Soja supports increased cultivation of sustainable non-GM soya in and for Europe. A huge potential lies in non-EU countries such as Ukraine, Serbia, Bosnia & Herzegovina and Moldova.

PROTEIN PARTNERSHIPS AS A SOLUTION

Protein Partnerships are designed as an alternative programme to credits from overseas. Protein Partnerships are an easy tool to support and invest in building up safe and sustainable non-GM soya production in Europe at a

relatively low cost compared to physically segregated and certified products, while strengthening the first link of the physical value chain and investing in training and certification of farmers and primary collectors.

Within the framework of the Protein Partnerships, contribution to the following is achieved:

- | | |
|--|--|
| <ul style="list-style-type: none"> Economic development through local soya production, collection and processing, and regional integration through sustainable and GMO-free protein and soya supply; connection of SEE & CEE producers to western markets (buyers). | <ul style="list-style-type: none"> Environmental responsibility through reduced use of pesticides (exclusive use of substances permitted in the EU and prohibition of desiccants, such as glyphosate or diquat) and a ban on any new land-use change to create more agricultural land (this prevents deforestation, for example). |
| <ul style="list-style-type: none"> Rural development in SEE & CEE countries and improvement of conditions for mostly small and medium-sized soya producers. | <ul style="list-style-type: none"> Development of a transparent market for consumers. |

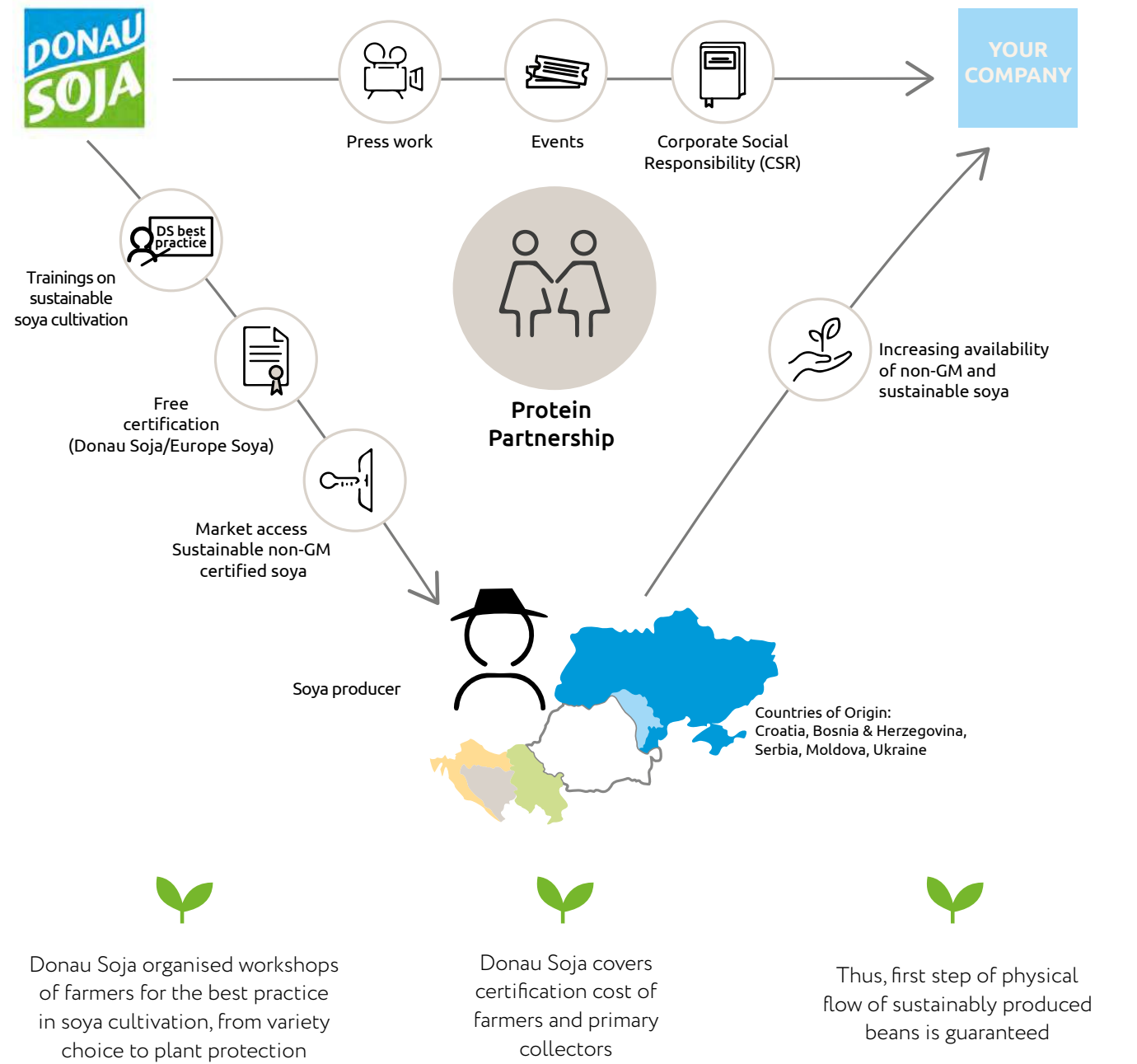
Relevant UN Sustainable Development Goals



Last year, around 850,000 tonnes of soya were made available on the European market through Donau Soja Protein Partnerships. For a large part of the quantities offered, buyers were found who purchased those quantities as certified Donau Soja & Europe Soya soya beans. A positive achievement that is to be further expanded in 2020. Additional quantities are available for Protein Partnerships this

season as part of the strategic partnership with the Austrian Development Agency (ADA). More than half a million tons of soya could be marketed as Donau Soja & Europe Soya from the 2020 harvest onwards as part of the Protein Partnerships – in addition to the already existing partnerships of 73,000 tonnes supported by REWE Group and LIDL International.

HOW IT WORKS



DONAU SOJA PROTEIN PARTNERSHIPS- DRIVING SUSTAINABLE CHANGE TOGETHER

Since 2015, the Protein Partnership with the REWE Group has been promoting sustainable soya bean production in Croatia while supporting capacity-building initiatives for local farmers and partners. The Donau Soja Protein Partnership concept includes training activities and demonstrations of the best practices in sustainable non-GM soya bean production under the Donau Soja standards, disseminating improved, environmentally responsible and sustainable farming practices for sourcing soya beans for the European market.



The Protein Partnership Project with REWE Group has enabled local cooperatives to successfully complete Donau Soja certification and place 15,000 tonnes of certified soya beans on the market in 2019. This has boosted the competitiveness of the local cooperatives and established business relations with market leaders to open up access to new international markets and expand exports to leading European crushers.

Partners of the REWE Group Protein Partnership have identified two Croatian cooperatives: Seges (Vukovar-Srijem County) and Axereal (Virovitica-Podravina County) as the best potential suppliers of sustainable,

non-GM soya beans of European origin. Within the Protein Partnership Project, Donau Soja has supported Seges and Axereal Croatia and their partner farmers through numerous capacity-building initiatives with a view to promoting sustainable, non-GM soya bean production. Our jointly developed programme has been focused on facilitating knowledge transfer, identifying end farmers' needs and educating the partners (Seges and Axereal Croatia) on the quality and quantity aspects of sustainable soybean production. In order to implement all planned activities, knowledge transfer partners and service providers were selected according to the goals of the project.

Advantages of implementing the Protein Partnership Project in Croatia:

- An EU Country very popular with customers as a holiday destination.
- In Slavonia, in the east, there are a lot of small and rather poor farmers.
- An area where increased value-added agricultural production offers good prospects.
- An opportunity to reduce vulnerability to poverty in rural areas through improved production and inclusion of small and medium-sized farms in local, regional and international value chains.
- Facilitating technological advancement and creating a vibrant business environment.





Lidl Germany, Austria and Switzerland entered into a "Protein Partnership" with the Donau Soja Organisation in autumn 2019. The goal of this cooperation is to consistently expand and support the availability of sustainably produced soybeans in Europe for European Market.

The Protein Partnership project is implemented during 2020 by Donau Soja Regional Centre Novi Sad and included 16 local partners – cooperatives from Serbia (11 partner cooperatives) and Croatia (5 partner cooperatives).

Through Protein Partnership Lidl Stiftung Co & Ag supported dissemination and demonstration of best practices in sustainable non-GM soybean production for production of Donau Soja certified soybeans in Serbia and Croatia. Through this project, more than 1,300 local farmers gained access to new information and knowledge on innovative, improved and sustainable soybean production practices that will support their competitiveness and environmentally responsible production. Topics like optimized fertilization, reduced herbicides use, use of mechanical weeding, use of just EU approved

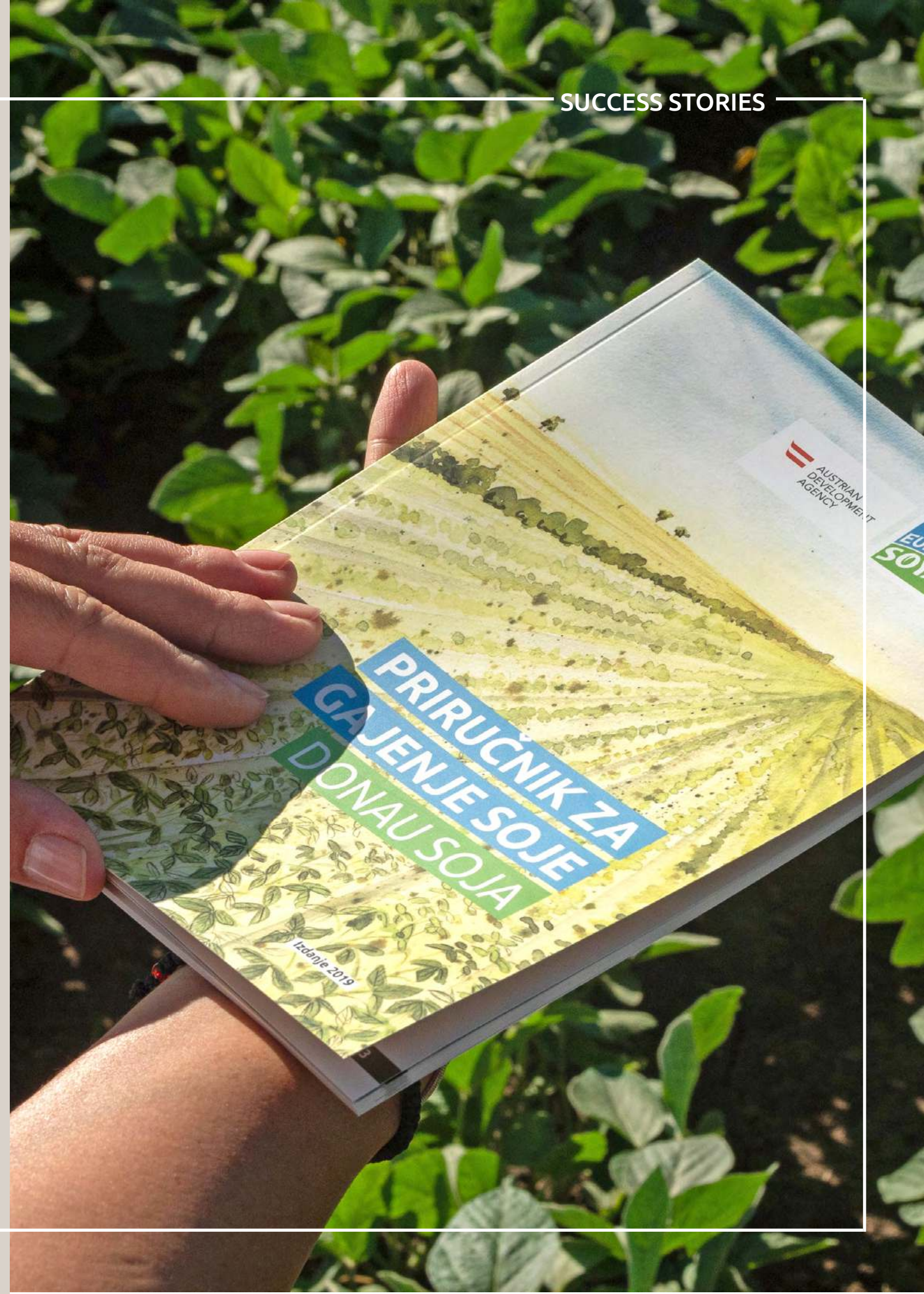
pesticides, and cultivar choice (high protein, appropriate maturity group, no desiccation) are covered.

Further, local partner cooperatives are supported to implement Donau Soja standard requirements and successfully complete Donau Soja certification process. Donau Soja Regional Centre Novi Sad team is actively working with representatives from partner cooperatives on creating good understanding and implementation of Donau Soja Standard requirements. As a result, 16 cooperatives will get Donau Soja certificate provided by external independent certification bodies and more than 60,000 tonnes of Donau Soja certified soybeans will be available after harvest 2020.

The Lidl Protein Partnership project is in first year of implementation with positive outlook that the cooperation will be prolonged and quantities of sustainable certified soybeans increased in the future. The long lasting cooperation and continuous project implementation directly contributes to long lasting and sustainable changes that will insure non-GM, sustainable and European soybean supply.

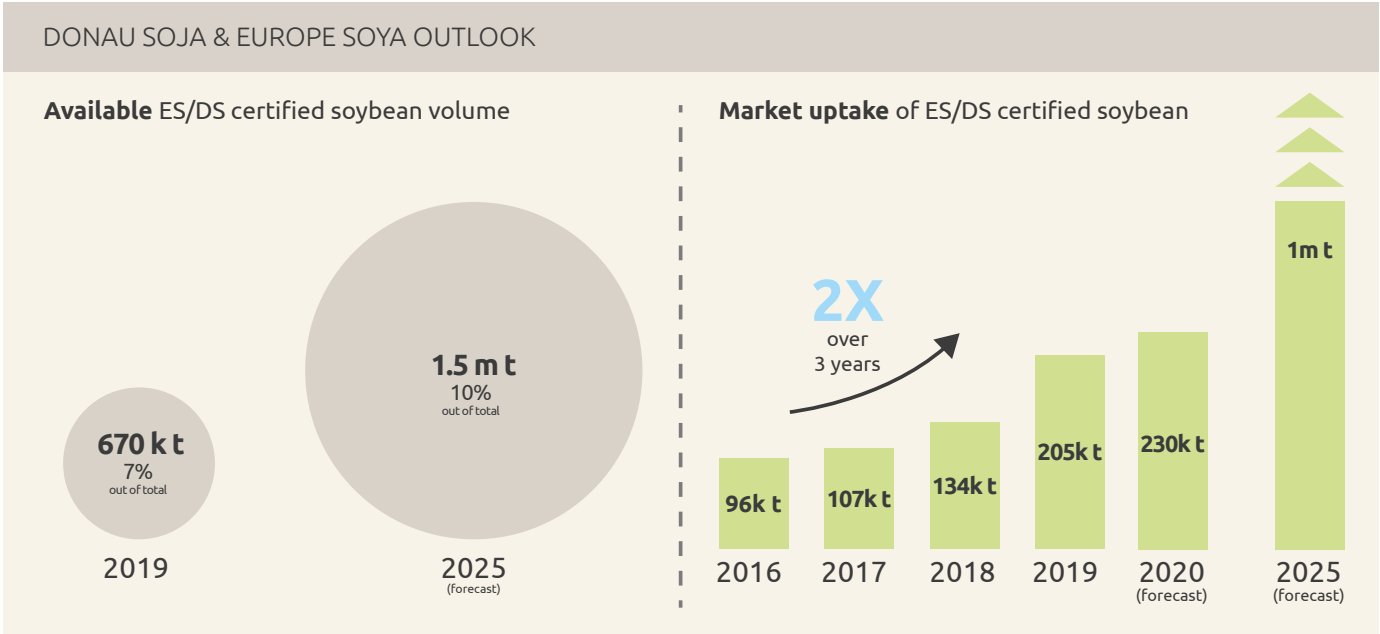
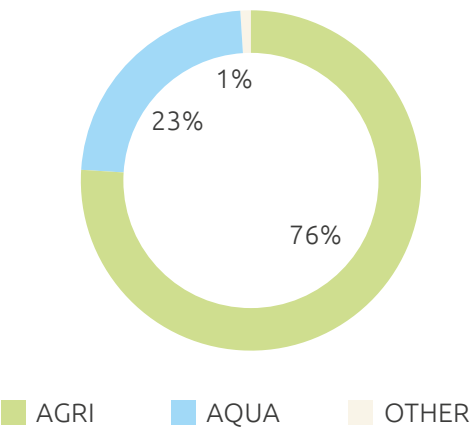


SUCCESS STORIES

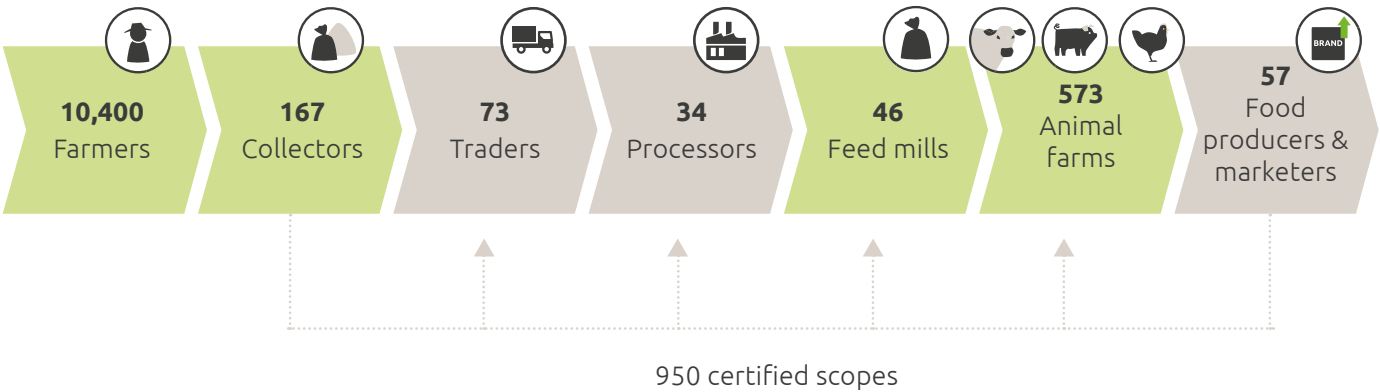


MARKET DEVELOPMENT

The key sectors that consumed Donau Soja and Europe Soya-certified soya products across Europe in 2019 were predominantly the agriculture (eggs, poultry, pork) and aquaculture sectors, followed by plant-based food products and pet food sectors. During 2019/2020, 675,000 tonnes of Donau Soja/Europe soya beans were produced by more than 10,400 farmers and certified at 167 collectors. This secures the Donau Soja standard's leading position in soybean certification across Europe. Donau Soja's plan is to certify 1.5 million tonnes of soya beans by 2025, with the market uptake raising to 1million tonnes.



10,400 farmers & 950 market players in the value chain



Donau Soja is an international, not-for-profit, multi-stakeholder, value-chain organisation that publishes the Non-GM Soya Market Report.

Market reports and statistics are essential to value-chain development. That is why Donau Soja focuses on providing such services. The market report is published monthly, providing an update on the soya industry with a special focus on the European non-GM market. The report highlights the most important facts and market news in the non-GM soybean market, including first-hand information from the key soybean-growing

regions regarding the supply and demand situation, price developments and updates on crop condition and regional field scouting results. This helps sellers and buyers make informed decisions based on up-to-date, relevant and specific information. In addition, Donau Soja regularly provides market updates and prepares brief reports on specific topics at the request of its members or country offices and beneficiaries.

Relevant UN Sustainable Development Goals



SUCCESS STORIES

SOYA-BASED PRODUCTS FOR THE CONSCIOUS CONSUMER

In 2019, two food producers announced the launch of products made with Donau Soja & Europe Soya-certified soya. Europe Soya-labelled organic tofu by **Jalofoods** is now available in Finland. While in Germany **Rügenwalder Mühle** offers several soya-based products resembling traditional German meat dishes with characteristic product names, e.g. Frikadellen or Hack. Plant-based foods are becoming increasingly popular and we look forward to more innovative projects in the years to come.

JALOFOODS LAUNCHING FIRST EUROPE SOYA LABELLED ORGANIC TOFU

Europe Soya has reached Finland! By 2020, the tofu and tempeh producer Jalofoods had brought to market two certified tofu products bearing the Europe Soya label. The raw beans in Jalofood's products are all organic and grown in the fields of Austrian soya producers. Oy Soya Ab/Jalofoods has been committed to organic production and responsible sourcing ever since. As early as 2018, Oy Soya Ab joined the Donau Soja network as one of the trailblazers of plant-based food production in Finland with 30 years of experience in tofu manufacturing. By labelling their tofu products with the Europe Soya label, the company is taking the next big step and advertising it prominently to customers. Beginning in 2020, several organic tofu products under the brand Jalotofu will be released with the Europe Soya label on the package. The initial plan is to sell the products to hotels, restaurants and catering companies in Finland. More Europe Soya-labelled products are in the pipeline and expected to be launched in September 2021. We are happy to support our trusted partners, such as Jalofoods, with a label that makes European origin traceable and visible to the consumer.



For going even more local, Rügenwalder Mühle started trials for their own soy cultivation in Germany.

RÜGENWALDER MÜHLE'S MEAT-FREE PRODUCTS

Today, meat-free products are becoming increasingly popular. Rügenwalder Mühle recognised this trend very early and – after several years of development - launched its first meat-free products on the market at the end of 2014. Since April 2019, the German company has also been using certified Donau Soja soya from non-GM, regional and sustainable production in the Danube Region for the production of vegetarian and vegan products. Donau Soja-certified soya is already used in making the following products – Vegetarische Mühlen Hamburger, Vegetarisches Mühlen Hack and Vegetarische Mühlen Frikadellen (small). Donau Soja is happy to acknowledge that the share of soya originating in Europe already exceeds 45% of Europe's total consumption. We are proud that Donau Soja contributes prominently to promoting soybean cultivation in Europe to maintain a regionally produced and sustainable protein supply to Europe. In 2020, Rügenwalder Mühle is going even more local: two fields in Germany have been sown with soya beans in cooperation with a partner. The next steps are product trials before the first products made from German soya hit the market. Rügenwalder Mühle has been a member of Donau Soja since 2015 and is committed to supporting a regional protein supply. We are very pleased that now Donau Soja-certified soya is used in the production of Rügenwalder's veggie products. Step by step, further products are to be converted to soya from Germany and Europe.

“FOR SOME PRODUCTS, RÜGENWALDER MÜHLE IS ALREADY USING CERTIFIED DONAU SOJA

COMMUNICATION FOR CHANGE

Awareness raising is one of the most important activities of Donau Soja that impacts the market and promotes business development. Communication and promotion of Donau Soja's values and objectives through different online and offline channels, together with the organisation and participation in events, strongly support and foster market and value-chain development. In practice, awareness raising goes hand in hand with market development as its essential part.

PARTICIPATION AND SUPPORT OF MAJOR INDUSTRY EVENTS

The main goals that Donau Soja advocates through public communications include advanced cultivation methods, efficient distribution and conscious consumption of protein, particularly soya and processed soya-based products.

Expert presentations:

- export market conditions and analytical information;
- distribution of knowledge on sustainable agronomical practices;
- current trends on world and European market;
- existing quality standards for soya;
- current initiatives facilitating support and development of sustainable production of soya and soya-based processed products;
- promotion of Donau Soja members;
- presentation on recent trends in import requirements for soya and its processed products.

Press releases 18
Press events 3
Written articles 19

40
PRESS

Print & Online 902
TV 243
Radio 167

1,313
MENTIONED IN MEDIA

40 DONAU SOJA EVENTS

ORGANISED BY DONAU SOJA OFFICES
CONGRESS | NETWORKING EVENT
SYMPOSIUM | CONFERENCE | FORUM
SEMINAR | FIELD DAY | BUYERS MISSION

1,941 PARTICIPANTS

21 EVENTS DONAU SOJA PARTICIPATED

SPEAKER | PANEL DISCUSSION
CONGRESS | NETWORKING EVENT
SYMPOSIUM | CONFERENCE | FORUM
SEMINAR | FIELD DAY

4,795 PARTICIPANTS

Relevant UN Sustainable Development Goals



THANK YOU FOR COMING

AQUA PROJECT 2019

Norwegian salmon production strongly relies on sourcing soya feed components (Soy Protein Concentrate – SPC) from Brazil. This sourcing strategy increasingly raises social and environmental concerns, stemming from the continued deforestation and unsustainable conversion of natural ecosystems, and the situation is more aggravated by unrestricted use of pesticides, land degradation and exploitation of disadvantaged rural workers. **Europe Soya offers an alternative.** The Europe Soya certification system meets the demand for more sustainable, non-GM, regionally produced and transparent soya supply. In addition, it contributes to promoting climate-friendly agrifood practices all over Europe and supports regional farmers. Over the past several years, the **Sodrugestvo Group** and Donau Soja have joined forces in building a Europe Soya-certified value chain, sourcing certified soybeans from Serbia, Croatia and Romania to supply **SPC production** in the Sodrugestvo processing plant in Kaliningrad, Russia. In 2019, more than **4,700 farmers**, organised into some 70 certified cooperatives, produced and exported **177,000 tonnes of Europe Soya-certified soybeans** within this value chain. This is seen as a huge success for regional farmers and cooperatives, showcasing their ability to produce high-quality products for some of the most demanding European markets, such as aqua and pet food.



INTERNATIONAL PARTNERSHIPS AND FUNDRAISING

STRATEGIC PARTNERERSHIP WITH THE AUSTRIAN DEVELOPMENT AGENCY



The Donau Soja Association activities are supported by the Austrian Development Agency (ADA). Currently Donau Soja is implementing the Strategic Partnership Project «Building sustainable, inclusive and well-functioning value chains for non-GM soya and organic soya in Serbia, Bosnia and Herzegovina, Moldova and Ukraine» funded by ADA over a period of 7 years (2017-2023).

The goal of the strategic partnership project is to build sustainable, inclusive and well-functioning value chains for non-GM soya and organic soya in Serbia, Bosnia and Herzegovina, Moldova and Ukraine until 2023.

In a period of 7 years, common efforts of Donau Soja and ADA will bring benefits for the domestic markets, food producers, consumers and the environment in the four countries, as well as strengthen their trade and economic relations with the EU until 2023.

The target group includes soya producers, collectors and traders, food and feed producers, soya processing plants and seed producers in the four target countries. In addition, public extension service providers, farmers` associations, agriculture and research institutes, certification and control bodies, ministries of agriculture and food safety agencies will benefit from capacity development activities. The indirect target group comprises all participants along the value chain where agricultural workers, as well as thousands of consumers – in the four countries, but also in EU and other non-EU countries–will benefit from the planned activities.

The following **activities** will be conducted in order to systematically develop the soya markets in the 4 countries: trainings for producers to share knowledge and best practices in soya cultivation and processing, capacity development of extension services, the

introduction of the Donau Soja and Europe Soya (DS/ES) quality system and labelling scheme, the promotion of organic cultivation, support to market development and trade facilitation, improvements of business environment to favor soya production, processing, trade and use, as well as the promotion of European standards in agricultural production.

Expected results of the programme can be summarized as increased competitiveness of local soya producers and processors in rural areas in the four European countries; increased access to local, regional and international markets; positive income development and safeguarding of jobs in soya based value chains in target countries; sustainability through capacity development (e.g. trainings and consulting service for actors along the soya value chain); improved legal and policy framework for production and trade with non-GM soya from the Danube region/Europe and alignment to EU quality standards and certification of locally produced soya under “Donau Soja”, “Europe Soya” or Non –GM standards in the four countries until 2023.

The Strategic Partnership (SP) programme combines activities in nine areas of intervention. These are further divided into components (activities) planned to be implemented in target countries and components (activities) to be implemented on an international level.

Areas of intervention/components - tailor made for target countries include:

1. Production and processing	Improvement of product quality and quantity, promotion of the best practices for European, sustainable and non-GM soya production, introduction of new forms of cooperation, improvement of access to inputs and the promotion of organic soya production as an attractive market niche (Moldova, Ukraine).
2. Value chain development	Creation of linkages and networks among all value chain participants. Market development for sustainably produced Non-GM products with regional added value.
3. Awareness raising and sensitization	Dissemination of information about local production, healthy nutrition, food safety, and environmental aspects of agriculture and food production.
4. Certification and labelling	Setting up sound procedures and institutional frameworks consisting of certification bodies (CBs), qualified experts and testing facilities to guarantee product quality and to build the basis for accessing markets.
5. Business environment and policy framework	Contribution to conducive and effective support mechanisms and regulations for soya production and trade.

Areas of intervention/ components - international

6. International market development and public awareness	Match-making and linking the value chain participants from SEE and CEE with buyers in EU markets. Market development activities and costumer relationship system. Use of international PR for awareness raising of EU consumers.
7. Knowledge and technology transfer	Introduction of new standard developments and quality assurance along the value chain. Knowledge transfer and dissemination of state of art production and processing, quality management.
8. Project development and consultancy	Providing support to project development and access to funding through consulting and technical assistance.
9. Project management and implementation	Smooth project implementation including general coordination (and cross-cutting issues), financial and administrative management, monitoring and reporting.



This project is funded by the European

COOPERATION AUSTRIAN DEVELOPMENT AGENCY AND EUROPEAN UNION

Together with its consortium partner, the Moldovan NGO Pro Didactica, Donau Soja implements a project for increasing the competitiveness of the Moldovan agri-food-sector (with special focus on the soya value chain). This EU financed and ADA-managed project aims to improve existing quality standards and to strengthen capacities in vocational education and training in agriculture.

The project goal is to increase the competitiveness of the agri-food sector in Moldova through integration to domestic and global value chains, in particular in the soya sector. The project further complements the Moldova-component of the regionally organized Strategic Partnership between ADA and Donau Soja, which supports the building of sustainable and inclusive value-chains for GMO-free and organic soya in Bosnia and Herzegovina, Serbia, Moldova and Ukraine.

In the framework of the European Union's (EU) Action Document for the Development of Rural Areas in the Republic of Moldova under the European Neighborhood Instrument (ENI) the EU delegated the Austrian Development Agency (ADA) with the management of the EU's financial contribution to increase the competitiveness of the agri-food sector in Moldova through integration to domestic and global value chains, in particular in the soya sector.

ADA awarded a grant to a Project consortium consisting of Donau Soja and Educational Center Pro Didactica to implement activities divided in the four components:

- Enhancing capacities for innovation and education in agriculture in Moldova
- Increasing access to market and advancing the demand for certified and organic agri-food products on national and foreign markets

- Use of standards and certification to raise the performance of value chains
- Promoting an enabling environment for ensuring quality standards in the agri-food sector and alignment of Moldova's legal framework and policy documents to EU quality standards

In the project, Donau Soja, with large regional and international network and proven expertise in soya value chain is generally responsible for the workstreams related to capacity development and soya value chain development. On the other hand, the Educational Centre Pro Didactica has a strong local reputation and hands-on knowledge of the Moldovan education sector. Successful implementation of the foreseen project activities is the consortium priority along with respect towards social and environmental standards and gender equality. The project will directly and indirectly contribute to the UN Sustainable Development Goals (SDGs), especially SDG 1, 2, 4, 8, 9, 12, 13 and 15. The direct project beneficiaries include soya producers, collectors, feed and food producers, the Moldovan Centre of Excellence in Horticulture and Agricultural Technologies as well as VET Institutions. Additionally, employees by all value chain actors, teachers from all involved schools and students will gain direct benefits from the project.

In Moldova Donau Soja's activity includes the implementation of two major projects, financed by:

1. European Union – the project “Increasing the competitiveness of the agri-food sector through integration to domestic and global value chains, in particular in the soya sector, implemented by ADA, in partnership with Donau Soja and a local Educational Center ProDidactica.

2. Austrian Development Agency – Strategic Partnership, implemented in Bosnia and Herzegovina, Serbia, Moldova and Ukraine. The activities implemented by Donau Soja in Moldova in 2019 focused on the four components as provided in the EU financed project:

COMPONENT 1

To facilitate more efficient technological know-how transfer to soya producers, **six demonstration platforms have been established**, presenting both conventional and organic production systems, using good quality seeding material of different varieties and diverse agricultural inputs. In July 2019, **three field-day events were successfully organised** to transfer the best applied practices through the demonstration platforms to the soya producers. The results on the productivity of different varieties obtained by the

demonstration platforms were presented to producers during the **round table meeting at MoldExpo on 17 October 2019**.

The Organic Best Practice Manual (BPM) was translated from English into Romanian and adapted for application in Moldova. Cooperation of Moldovan R&D sector with international institutions is very important. Therefore, with support from Donau Soja, the Moldovan Research and Breeding society joined the European Soy Breeders' Network (ESBN).

COMPONENT 2

Aims at increasing **access to market** and promoting demand for certified and organic agri-food products on national and foreign markets. The progress achieved under this component has included results from a wide range of activities. Donau Soja facilitated a **round-table meeting between soya processors** and representatives of the Association of Poultry Farms in February 2020. Donau Soja facilitated the participation of two Moldovan producers and exporters, Agrostoc Business Cooperative and WeTrade Ltd, in the **Karlboerse Exchange in Prague in March 2019** and also the participation of Prograin Organic and Agrostoc Business Cooperative **in the 59th Commodities Exchange, Vienna, on 17-18 October 2019**. With a view to enhancing Moldovan traders' export capabilities, **a training seminar for soybean exporters**

and traders was organised in November 2019 with the participation of 5 companies. The training was delivered by Donau Soja representatives and experts who addressed such issues as global market trade flows (major country markets by consumption, top processing companies, the structure of consumption by sectors), requirements with regards to quality, certification, certification according to DS/ES standards, logistics, pricing strategies, etc. In the context of local market development, **a study visit to Austria was organised for a group including two soybean processors and two soymeal consumers** from the district of Orhei, with the goal to strengthen the establishment and development of regional soya value chains.

COMPONENT 3

Use of standards and certification is focused on building non-GM soya and organic soya value chains and implementation of relevant quality standards, which represent the prerequisites for competitiveness

and access to new markets. Donau Soja carried out the following activities in 2019: **two training events (both of those initial training courses for certification to the Donau Soja/Europe Soja Standards) were conducted**.

COMPONENT 4

Promoting an enabling environment for ensuring quality standards in the agri-food sector (including organic agriculture and products) and alignment of Moldova's legal framework and policy documents with EU quality standards. **A round table discussion in January 2019 and a National Workshop to develop an Action Plan for Soya Sector Development in Moldova on**

6 November 2019 (about 70 participants) were organised with the main stakeholders of the soya value chain. The main objectives were to discuss the challenges and opportunities of the sector, collect opinions and formulate suggestions to serve as a starting point for the development of the National Action Plan.

INTRODUCING FIELDS OF EUROPE: DEVELOPMENT OF A EUROPEAN FOOD AND FEED STANDARD

The project to develop a European food and feed standard is part of Donau Soja's Strategic Partnership Programme with the Austrian Development Agency (ADA). Donau Soja holds the Fields of Europe project secretariat and invites all interested parties to join in the development of the European food and feed standard Fields of Europe. Both food and feed industries will be able to use this standard to source non-GM and sustainable inputs of European origin. In this way, the Fields of Europe standard will contribute to building sustainable, inclusive and efficient value chains for European non-GM food and feed products.

TIMELINE OF STANDARD DEVELOPMENT

In 2019, a coalition of organisations and companies from the feed and food sector came together to develop a European food and feed standard, named Fields of Europe. The steering group consisting of the Royal Agrifirm Group, ADM, Ameropa, BFA, Donau Soja and Fenaco aimed to create a standard that meets the demand for European products,

created by plant-based and animal-based protein supply chains, with a focus on locally produced ingredients for food and feed. The standard is being developed for companies in the feed and food supply chain that wish to produce and market a feed or food product with non-GM ingredients from Europe which are produced in a sustainable way.

April 2019

The **Fields of Europe** initiative is formed

HY1 2020

The European food and feed standard **Fields of Europe** is developed

HY2 2020

A public consultation on the standard is held (July-October 2020)

HY1 2021

The standard is finalized, and the **Fields of Europe** system becomes operational

WHY A EUROPEAN FOOD AND FEED STANDARD?

Increasingly, companies choose to buy and use products from European origin in their feed and food products. Not only to preserve the European way of farming, but also to close nutrient cycles, reduce food miles and adhere to the demands for non-GM products. Currently, each company defines and verifies European

origin independently. With the introduction of Fields of Europe's shared definitions and practices, European supply chains unite to meet Europe's demand for high-quality feed and food products. Fields of Europe is open to all companies in the European food chain that wish to promote the European origin of their products.

SYNERGIES BETWEEN FIELDS OF EUROPE AND DONAU SOJA

Fields of Europe will

- contribute to an improved understanding of 'risks' of sourcing from Europe
- increase the market demand for non-GM, European soya produced in a sustainable way
- create a stimulus for farmers outside EU-28 to join in Donau Soja's certification program in order to produce in line with Fields of Europe.
- lead to fairer competition because of a level playing field between EU-28 and the rest of the European continent.

BENEFITS OF USING FIELDS OF EUROPE

Make use of a trustworthy system to claim local -European- origin

Use one system for three topics: origin, non-Gm and sustainability

Benefit from an innovative and efficient verification mechanism

Be actively involved to co-develop the standard in a multistakeholder setting



JOIN US!

The group of founding members take seat in the steering committee. This committee meets once every two months to discuss progress. New companies and organisations are very welcome to join the initiative and take place in the user group and ad-hoc working groups.

For more information about Fields of Europe:





Contact the Fields of Europe secretariat: info@fieldsofeurope.org

Visit the Fields of Europe website: <https://www.fieldsofeurope.org/>

RESEARCH & INNOVATION PROJECTS

With Donau Soja soya takes on a European identity. A new face for European farmers. Therefore, we invest directly in education and research to underpin the development of agricultural systems and value chains in the longer term. This also includes investment through international cooperation in agricultural research and extension services, technological development in order to enhance productive capacity in the target developing countries, thus supporting Sustainable Development Goals 4 (Quality Education) and 9 (Industry, Innovation and Infrastructure)

in particular. Donau Soja is a pro-active participant in the European Union's Horizon 2020 research and innovation programme. It is especially focused on building research collaborations between the developed and developing parts of Europe, thereby increasing relevant research capacity. Connecting SDG 2 and 9, the Donau Soja efforts in research are focused on supporting the farmers by improving cropping systems and enhancing international cooperation, especially in the use of germplasm (gene banks).

Name of the project	About the project	Results 2019
<p>INTERNET OF FOOD AND FARM 2020</p>  <p>IoF2020 has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement no. 731884</p> 	<p>In the framework of the project "Internet of Food and Farms 2020" (IoF2020), Donau Soja contributes to increased premium-quality soya cultivation in the EU, through the implementation of the Use Case Soya Protein Management. The (IoF2020) project explores and fosters a large-scale implementation of the Internet of Things (IoT) in the European farming and food sector. In partnership with the Italian ICT company Sysman P&S, Soia Italia and Donau Soja work on the development of a decision-making support system for soybean producers. Through a combination of various data sensors, e.g. weather stations, near-infrared-sensors for quality mapping, or electrical conductivity tests for soils, farmers will be supported in producing soya beans with higher protein content, for instance by suggesting optimal planting and harvesting times or proposing optimal times and amounts for the most efficient irrigation.</p>	<p>In 2019, we worked intensively on validating connections between soil, climate and harvest indicators through comprehensive data collection (e.g. with an IoT Near-Infrared-Sensor mounted on a combine during harvesting) and statistical analysis.</p>
<p>LEGUMES TRANSLATED</p> <p>(Translating knowledge for legume-based farming for feed and food systems)</p>  <p>This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 817634</p> 	<p>The Legumes Translated project aims to synthesise and disseminate knowledge for the production and use of protein crops in Europe. Legumes Translated supports production and use of grain legumes (protein crops). As a thematic network, it helps farmers benefit from relevant research, particularly research funded by the European Union. This addresses how we obtain and use protein, which is a fundamental factor in the resilience, performance and acceptance of our farming systems. Legumes Translated is part of the European Innovation Partnership for Agricultural Productivity and Sustainability (EIP Agri). The consortium comprises 18 partners in 9 countries with 15 local innovation groups (Actor groups). The consortium will provide an internet-based knowledge platform for supporting legume cropping and use, supporting the European Innovation Partnership for Agricultural Productivity and Sustainability (EIP Agri).</p>	<p>After the kick-off in November 2018, the project partners established seven international thematic groups for developing knowledge outputs, relevant to supporting the cultivation of grain legumes and the advancement of their value chains. The main knowledge outputs in this project are practice notes or videos. They are available on the project's YouTube channel and website: www.legumestranslated.eu. Currently more than 12 videos relevant to soya cultivation are available. Donau Soja works together with FiBL leading the effort to develop knowledge outputs. Donau Soja intends to use the project during 2020 and 2021 to establish a compendium of knowledge outputs for soya cultivation in several languages of Central and Eastern Europe.</p>

Name of the project	About the project	Results 2019
<p>OK-NET ECOFEED</p>  <p>This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 773911</p> 	<p>The overall aim of OK-Net EcoFeed is to help farmers, breeders and the organic feed processing industry in achieving the goal of 100% use of organic and regional feed for monogastrics, in particular pigs, broilers, laying hens and parents of broilers and laying hens. In the last two decades, the market for organic food has shown steady and vigorous growth in most parts of Europe and this growth is still accelerating. A key objective of organic farming is the closing of nutrient cycles, but it is difficult to achieve. To a large extent, feed and livestock production, in particular of pigs and poultry, is concentrated in different regions, and animal feed (especially proteins) has to be imported from regions far away. In addition, organic farmers have difficulties in sourcing protein feed of organic quality. The lack of organic and regional feed threatens both the sustainability of organic agriculture and consumer confidence.</p>	<p>In 2019, Donau Soja facilitated meetings with its regional innovation group in Serbia. Ideas were shared on how best to tackle the challenge of organic animal farms lying in close proximity to soybean fields and how to address the organic protein gap. The group identified small-scale processing equipment for soybeans as the most promising tool. Specialised equipment manufacturers provide suitable solutions for farms in Central Europe and Donau Soja contributes to sharing experiences from pioneering farms. Among them, there are also - DS members EST GmbH (Austria), Agrel (Germany), Oil Press (Germany) and Farmet (Czech Republic). Related knowledge outputs developed by DONAU SOJA in collaboration with FiBL are accessible on the YouTube Channel of FiBL and on the online knowledge platform "Organic Farm Knowledge".</p>
<p>FRIEDRICH HABERLANDT SCHOLARSHIP</p>  	<p>The Friedrich Haberlandt Scholarship was established by Donau Soja for financing a doctorate at the University of Natural Resources and Life Sciences, Vienna (BOKU), in cooperation with the Graduate School of the Chinese Academy of Agricultural Sciences (GSCAAS) and with financial support of the German states of Baden-Württemberg and Bavaria, Agroscope (Switzerland) and Saatgut Austria. The scholarship is named after the agricultural scientist Prof. Friedrich Haberlandt (1826–1878) who pioneered soya bean cultivation in Europe. It is devoted to collaborative applied genetic research and for establishing long-lasting scientific liaison on soya beans between European and Chinese partners. The scientific project of the Haberlandt Scholarship builds on an international collaboration between soya bean researchers and breeders in China. It investigates the genetic diversity in European and Chinese cultivars and aims to contribute to further advancement of the development of new soya bean varieties for Europe and China.</p>	<p>In 2019, the research team at Donau Soja established together with the scholar Xindong YAO experimental plots at 15 locations across Europe. 70 soya bean cultivars from Europe and 70 of Chinese origin were sown. During the season, crop growth was monitored (phenotyping) and the plants were harvested. Depending on the geographical location, both early and late varieties were identified as possibly suitable for further research. Similar tests have been prepared by the Chinese Academy of Agricultural Sciences in Beijing, although the tests in China were limited in 2019 to one phytosanitary quarantine plot. During the winter months, Xindong will conduct further chemical and genetic diversity analysis of the tested cultivars.</p>
<p>CYBELE</p>  <p>This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement no. 825355</p> 	<p>Fostering precision agriculture and livestock farming through access to high-performance computing and big data analytics. CYBELE aims to generate innovation in the European agriculture and food sector through the convergence of high-performance computing infrastructure (HPC), big data analysis, machine learning methods, cloud computing and the Internet of things. Together with the Biosense Institute in Novi Sad, Serbia, Donau Soja contributes to the development of a yield-and-protein prediction model for soya bean fields. Based on satellite images, as well as on soil analysis, weather and further data, a software-model is trained to predict the harvest of soya bean fields, both in terms of quantity and quality. Through the combination of satellite images and data measured in the field, a proper model will be derived and validated. Donau Sojas' task is to collect data to verify the ground truth and develop business cases for the implementation of the prediction model.</p>	<p>In the initial year of the CYBELE project, 2019, the main results were georeferenced datapoints on actual yields and protein contents from soya bean fields. The data was gathered all over Europe through crowdsourcing.</p>

REGIONAL ASPECT (OFFICE UKRAINE)

One of our key goals in Ukraine is to increase the potential for competitiveness and attractiveness of the Ukrainian soya sector. Ukraine has a huge growth potential for soya bean production and processing. Technological advancement can yield a total of 6 million tonnes per year. This makes Ukraine a key partner for the EU in sustaining protein security. We pay great attention to the synergy of all market players, and the Donau Soja Association plays a role as a bridge between Ukraine and EU countries.

Since Ukraine views the EU as a major high-value market in its neighbourhood, its producers are eager to meet the buyers' high expectations regarding sustainability. This requires, among other things, that producers commit to non-GM (non-genetically-modified) production, especially when it comes to soya beans.



Donau Soja Members (Status as for the end of 2019 year)

- Agrarian System Technologies LLC
- Agritema LLC
- Agro-Luchky LLC
- Agroprodservice
- Arzinger Law Firm
- Astarta-Kyiv
- ATK LLC
- Grain Alliance Baryshevskaya Grain Company LLC
- Mlynyshe LLC
- Public Union "Organic Ukraine"
- Svarog West Group Corporation
- Ukrainian Association of Producers and Processors of Soy

SPECIAL ATTENTION TO THE EDUCATION PROJECTS

The activities of the Donau Soja Organisation in Ukraine are aimed, among other things, at raising awareness of non-GM soya bean growing technology while supporting young professionals and promoting gender mainstreaming initiatives.

The increasing share of soya in crop rotation profiles has encouraged a strong interest in advanced soya bean farming techniques as a method of boosting average yield. Yield significantly varies from year to year, however. While being higher than Ukraine's average and strongly benefitting from favourable weather conditions, our yields remain significantly lower compared to other European soybean-growing regions. This indicates a lack of specialist knowledge in soya growing techniques. The biggest concern is sustainable agronomical techniques. Another factor behind the low yield is the use of illegal GM soya varieties (banned in Ukraine). According to a survey of Ukrainian soya fields conducted by the NGO "Agent Green" in 2018, around 50% of soya cultivated in Ukraine is genetically modified.

SINCE 2018, THE DONAU SOJA OFFICE IN UKRAINE HAS BEEN IMPLEMENTING A SERIES OF EDUCATIONAL PROJECTS:

The Donau Soja Study Programme 2018 "Live Case of Non-GM Soya Cultivation: How to Grow Efficiently and Raise Competitiveness" was delivered in 5 regions of Ukraine

The Donau Soja Study Programme 2019 "Drought in Ukraine: Successful Soil Moisture Management Technologies" was conducted in 2 regions of Ukraine.

Support for youth and gender mainstreaming initiatives

Since 2019, the Donau Soja Organisation has sponsored two special nominations "Best Young Agronomist. Lady" and "Best Young Agronomist.Soya" as part of the competition "Best Young Agronomist".

SUCCESS STORIES

The awards were initiated by Donau Soja to enable young female agronomists to participate in the competition to boost their confidence and encourage more young people to consider pursuing a career in soya bean cultivation.


Educational and research partnership project

Donau Soja has launched an educational and research partnership project entitled the European Sustainable Soya Academy (ESSA). To educate the students of agricultural universities and farmers about soybean-growing technology, Donau Soja is developing 2 pilot projects in cooperation with the Sumy National Agrarian University (SNAU) and the Bila Tserkva National Agrarian University (BTsNAU).

KNOWLEDGE TRANSFER & THE BEST PRACTICES DISSEMINATION

Education programmes: The Ukrainian office dedicates a lot of attention to educational projects. These projects are aimed at expanding professional knowledge in the field of traditional and organic farming technologies, quality management, and promoting compliance with the Donau Soja and Europe Soya standards. In 2019, Donau Soja with the support of the Austrian Embassy in Ukraine and the Austrian Agrarian Cluster, CASE IH, KET Ukraine and the project Agrarian Receipts in Ukraine organised a training programme in 2 regions of Ukraine. The idea was proposed in response to an emergency

involving soil aeration and compaction in Ukraine, and the need to come up for solutions to help farmers deal with those challenges as they struggle to preserve soil fertility while maintaining consistent quality at the same time. Key questions addressed included preserving soil moisture, increasing fertility, loosening compaction, weed control, soil aeration and available agricultural finance instruments. The participants included both farm managers and agronomists, as well as students, university research and teaching staff, all of whom benefited from attending our educational programmes.



CLOSE COOPERATION BETWEEN SCIENCE, BUSINESS AND EDUCATION PROMOTES GROWTH UKRAINIAN AGRICULTURAL SECTOR

Use of demonstration fields, meeting demand for knowledge in non-GM soya cultivation. Donau Soja has been establishing trial plots and demonstrating best practices in non-GM soybean production. An experiment has been launched to test non-GM soya cultivation within the Astarta Select trial plots in Poltava and Vinnytsia regions. The experiment aims to assess the potential of the same soya varieties under different geographical and weather conditions. In cooperation with a top Ukrainian company and a recent member of Donau Soja, Astarta-Kyiv, we hosted a Soya Field Day to promote sustainable

growth within the Ukrainian agricultural sector by sharing best practices and traditional technologies. Soya Field Day 2019 was a great opportunity to evaluate the potential of top 60 non-GM commodity soybean varieties of both local and foreign origin within different maturity groups on one independent platform, a unique chance to find out more about efficient technologies of growing non-GM soya beans, a useful forum to meet the best experts of the farming sector, and an opportunity to see agricultural machinery in operation.

GENDER DIMENSION

The All-Ukrainian Contest "Best Young Agronomist" has been regularly held by the Agroexpert magazine since 2013. Its purpose is to identify active young men and women who have chosen agronomy as their profession. In particular, in addition to young agronomists who have already begun to work in the profession, graduate students majoring in agronomy have been admitted for the second year in a row under the terms of the competition. Donau Soja has initiated special nominations "Best Young Agronomist 2019. Lady" and "Best Young Agronomist 2019. Soya" in the competition. Together with the AgroExpert magazine, the Organisation awarded a woman who scored the most points and won this nomination. News of such an

award being instituted motivated young agronomists to participate in the competition as a unique opportunity to boost their confidence. This sets an example inspiring other female agronomists to challenge the popular belief that agronomy is an exclusively male profession. On 29 November 2019, a Business Lunch of Successful Women of Ukrainian Agribusiness was held with the winner of the special award of the contest "Best Young Agronomist of 2019. Agro Lady". Female leaders of Ukrainian agricultural business, including top public officials, private sector, civil society and media representatives, shared their inspiring experiences and gave encouragement to young female professionals wishing them success in their professional development in the farming sector.

MARKET DEVELOPMENT

Development of trade relations between Ukraine and EU Being № 1 producer and exporter of soya beans in Europe, № 8 in the world production and № 6 in the world export of soya beans, Ukraine plays an incredibly important strategic role in the European soya bean market, however, often faces export obstacles. Donau Soja conducted series of events in order to demonstrate great potential of soya bean industry in Ukraine.

- Buyers' Mission (15-16.05.2019): On 15 May 2019, nine international companies interested in Ukrainian non-GM soya bean production spent an intensive networking day together with representatives from 15 leading companies of the soya bean sector of Ukraine.

On 16 May 2019, the participants visited the terminals of TIS and MV Cargo in Odesa region, a modern non-GM soya bean crushing plant, AdamPolSoya in Khmelnytsk region, and soya bean fields of Agroprosperis Group in Sumy region.

- Buyers' Mission (30.09-03.10.2019): Donau Soja organised a visit by representatives of the largest French cooperative Solteam to Ukraine to contract long-term supplies of sustainable non-GM soya bean meal from Ukraine. Solteam representatives visited the processing facilities of the largest Ukrainian soya bean processors – Donau Soja members – ATK and Astarta-Kyiv.



Certified volumes

PARTICIPATION IN THE POLICY FORMATION

Donau Soja prominently contributes to discussions of economic cooperation between Austria and Ukraine, particularly focusing on the issue of proper regulation of GM circulation in the case of soya beans. Donau Soja together with the law firm Arzinger Donau Soja member

organised a closed event for leading agri-producers, processors and traders operating in Ukraine. Participants were able to ask important questions to the Head of the State Customs Service of Ukraine. Such events promote the growth of export volumes from Ukraine.

DONAU SOJA ANNUAL MEETING

On 29 January 2019, the first Annual Meeting of Members and Partners of the Donau Soja Organisation was successfully convened in Ukraine. In 2019, Donau Soja in strategic partnership with the Austrian Development Agency (ADA) achieved great results in local non-GM market development and export capacity-building for the benefit of Ukrainian producers through fruitful cooperation with like-minded partners and friends. About 100 partners of Donau Soja took part in the event, among them – representatives of the Ministry of Agrarian Policy and Food of Ukraine, Ministry of Ecology and

Natural Resources of Ukraine, Embassy of Republic of Austria in Ukraine, domestic and international producers and processors, certification bodies, suppliers of inputs and machinery, laboratories, associations and non-governmental organisations, media and others. Donau Soja serves as a unique platform for communication and networking, as well as a forum for the valuable exchange of international experience for its members and partners. It is with great pleasure that we will continue organising such events where you will be able to find reliable partners and good friends.

REGIONAL ASPECT (OFFICE SERBIA)

GENERAL INFORMATION

Regional office in Novi Sad Serbia is located in one of the most important soybean sourcing regions of South East Europe. Favourable agri-climatic conditions, locally adapted high-quality non-GM soya bean varieties and production technologies with a long tradition of growing soya in this region have laid a solid foundation for sourcing Donau Soja/Europe Soya certified soya beans for feed and food for entire Europe. To achieve this goal, Regional office in Novi Sad supports cultivation and processing of high-quality non-GM soya in this region and promotes sustainable value chains on local, regional and international markets.



Donau Soja Members
(Status as for the end of 2019 year)

Serbia:

Agribusiness Partner d.o.o.

Agrodjole d.o.o.

Animal Commerce d.o.o.

Biofor System d.o.o.

Bioprotein d.o.o.

Delta Agrar d.o.o.

Ecoagri Serbia d.o.o.

Eko Zemlja RS

Institut za zemljište

Institute for field and vegetable crops

Mercator -S Novi Sad

Serbia Organica - Nacionalno udruženje za razvoj organske proizvodnje

Sojaprotein d.o.o. Bečej

Tenen d.o.o.

Victoria Group

Croatia:

Seges d.o.o.

BIH:

Bimal d.d

Bingo d.o.o. Tuzla

SUCCESS STORIES



“
CONSUMERS HAVE THE RIGHT
TO KNOW HOW THEIR FOOD
HAS BEEN PRODUCED!

THE FIRST NON GMO CERTIFIED AND LABELLED PRODUCTS AVAILABLE TO CONSUMERS IN BOSNIA AND HERZEGOVINA

In 2019, two Donau Soja members from BIH, the biggest retail chain Bingo and a leading company from the oil industry, Bimal, brought to the market two non-GM certified products – eggs and vegetable oil. Both companies have confirmed their strong commitment to non-GM production, following European trends towards non-GM certification and labelling and thus ensuring the high-quality of products for end consumers. Those are the first non-GM certified products in the region. In BIH, the Non-GM Danube Region Standard has been adopted by the Food Safety Agency as a baseline for National Guidelines for non-GMO production, certification and labelling. The launch of the first non-GM products was followed by successful PR campaigns. Donau Soja organised a press conference with eminent speakers from three ministries, the Food Safety Agency and company representatives where all highlighted the importance of non-GM certification and labelling to supporting local producers and promoting market transparency.

Certificirana
domaća
BEZ GMO
proizvodnja



The Label Non-GMO Produced guarantees that the whole production process, including feed and all product ingredients, is controlled and certified to the Non-GM Danube Region Standards. This standard was developed jointly with 14 Ministries with the aim of creating a harmonised non-GMO standard for the entire region and a uniform label - Non-GMO Produced.



MARKET DEVELOPMENT

The strategy with parallel approach is driving local/regional and export markets development. By complying with Donau Soja/Europe Soja certification, local producers and processors support increased competitiveness and access new international markets. In the local and regional markets, a strong focus is placed on the non-GM certification and labelling of feed and food products under the Non-GM Danube Region Standards, adding value to local agriculture and feed and food industry.

- More than 260,000 tonnes of soya beans from the region (Serbia, Croatia, Romania) were certified in accordance with Donau Soja/Europe soja standards and over 140,000 tonnes were exported to international markets. This is a huge success for the region, which has opened up access for certified soya beans to the most demanding markets of Western and Northern Europe.

- The first non-GM-labelled products under the Non-GM Danube Region Standards were successfully certified and placed on the market in Bosnia and Herzegovina by the leading retail chain Bingo and the Oil Company Bimal group. This brings transparency to the market while increasing the competitiveness of the local companies by adopting the non-GMO strategy and enabling the consumers to choose local, non-GM-labelled food.
- Regional Networking Event organised in December 2019 gathered more than 150 Donau Soja members and partners from the region and all over Europe. Participants seized the opportunity to engage in B2B discussions, match making and expanding their business network. The greatest achievements of Regional office in Novi Sad of the past 5 years were presented during this event.

KNOWLEDGE TRANSFER & THE BEST PRACTICES DISSEMINATION

Transfer of know-how and dissemination of the best sustainable non-Gm soya production technologies were provided directly to farmers through trainings, study tours, field demonstrations (demo-fields) and Field Days events.

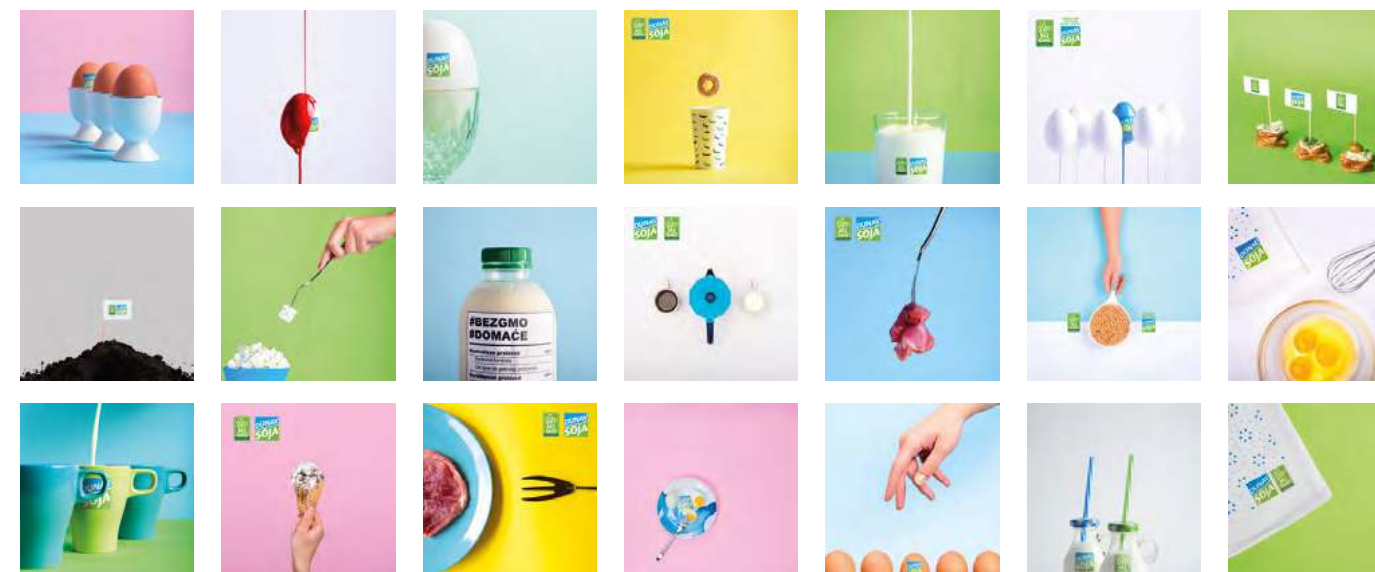
- Demonstration fields and Field Days events were organised in Serbia and Croatia in June 2019, together with 38 partners. 57 soya bean varieties, 30 different fertilisers and inoculants, 15 combination of herbicides were tested on more than 100 demonstration plots. New technologies and sustainable practices in soybean cultivation were demonstrated to more than 500 visitors on Field Days in both countries.

- Workshops and education opportunities were provided to farmers as part of the Protein Partnership
- Project supporting local small and medium-sized farmers of the region. We used these opportunities to disseminate knowledge about sustainable practices in soybean production and market information from local and European markets.
- Regional office in Novi Sad hosted a study tour for the delegation from Moldova, representing leading Soybean producers, experts and representatives of the Ministry of Agriculture to exchange knowledge and good practices and set up a strong basis for future cooperation.

PARTICIPATION IN THE POLICY FORMATION

Regional office in Novi Sad is working in close cooperation with regional ministries, government agencies and policy stakeholders to support a favourable business environment and policy framework for sustainable soybean growing and valorisation of short value chains through Donau Soja/Europe Soja/Non-GM Danube Region Standards. Regional Centre representatives participated and prominently contributed to numerous agricultural policy forums, roundtables and conferences, such as the Food Safety Conference in Croatia in May 2019, a press conference with the Ministries in BIH in May 2019, Agricultural Policy Forum (APF) Contribution

of Diversification of Economic Activities to Sustainable Rural Development in SEE organised by the Standing Regional Rural Development Working Group-SWG under the Ministry of Agriculture, Forestry and Water Economy of North Macedonia in October 2019 and other events. Donau Soja has also facilitated the establishment of a non-GM certification and labelling framework in Croatia and supported national institutions in building up knowledge and capacity. It is through consistent cooperation with all policy stakeholder groups in the region, that Regional Centre Novi Sad is contributing to increased collaborative engagement towards European Protein Strategy goals.



NON GMO CAMPAIGNS IN BIH

A press conference was held in the BIH Parliamentary Assembly building in Sarajevo to present the first non-GM certified and labelled products of the Region. Eminent speakers, representatives of three Ministries (Minister of Foreign Trade and Economic Affairs, Minister of Agriculture of Republic Srpska and Federal Ministry of Agriculture), Food Safety Agency, non-GM-certified companies and Donau Soja members, Bimal and Bingo, jointly presented a cooperation initiative under the auspices of Donau Soja and the first products labelled in accordance with the Non-GM Danube Region Standard. All speakers highlighted the importance of non-GM certification and labelling for local agriculture, food

industry and market transparency to benefit consumers. More than 50 media reports confirmed the huge interest held by the public of our region in this topic. Donau Soja supported campaigns by non-GM-certified companies, Bingo and Bimal, who have labelled their products (Bingo eggs and Bimal oil) with the regional label Non-GM Produced. Mass media campaigns including branding at the points of sale and social media campaigns, have given a strong impetus to advocating the value of local non-GM production to the general public. The campaigns have raised consumer awareness in BIH about non-GM products and the importance of market transparency and the right to know how food is produced.

LOCAL PR

PR activities covering Field Day events in Serbia and Croatia in June 2019 yielded more than 50 media appearances. Partners have prominently contributed

to Donau Soja's media relations work as a sign of shared commitment to sustainable practices in soybean production recommended by Donau Soja standards.

Annex 1

DONAU SOJA BOARD AND PRESIDIUM

DONAU SOJA BOARD

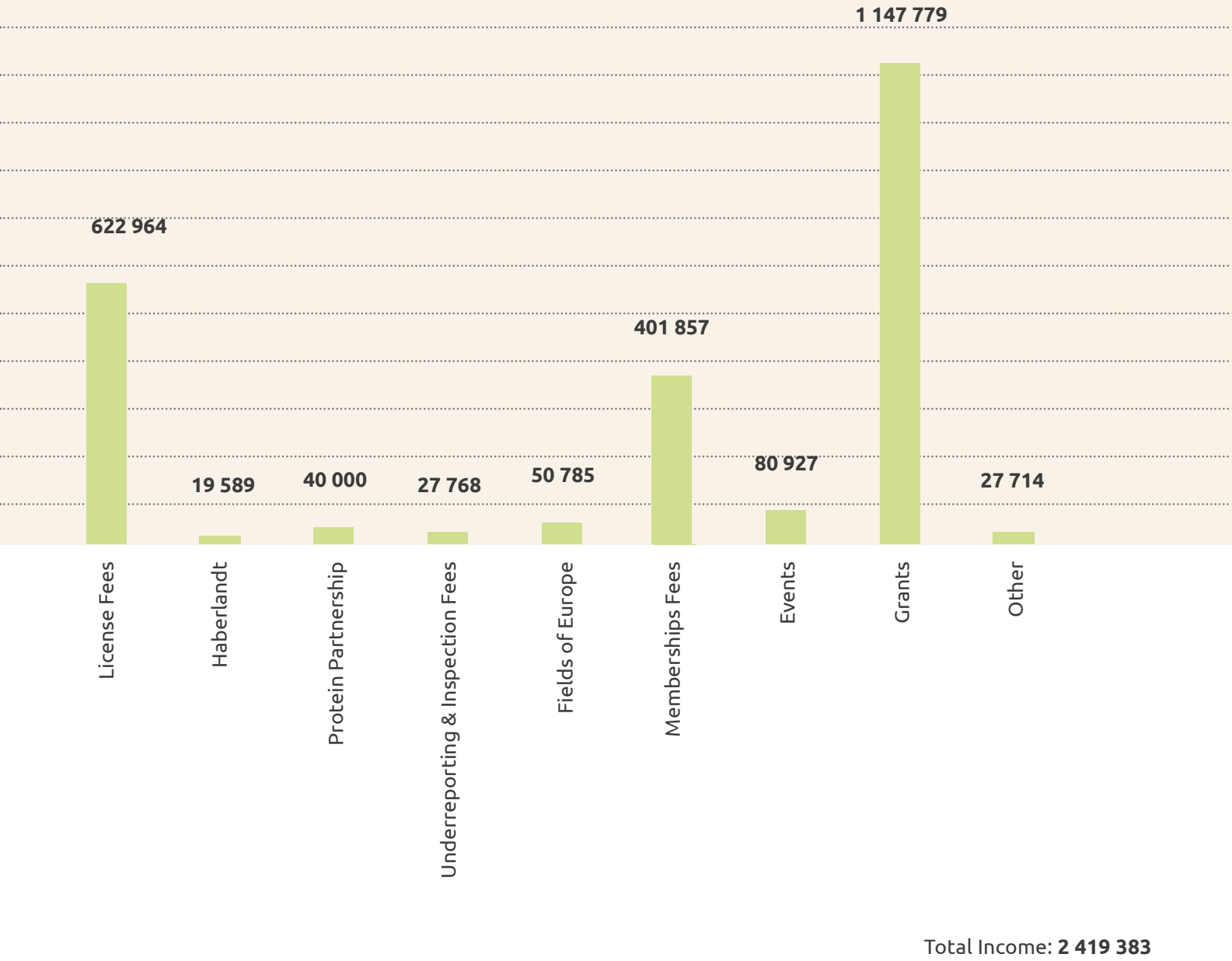
Matthias Krön (Chairman)	Donau Soja (AT)
Stephan Dorfmeister, MBA (Treasurer)	Donau Soja (AT)
DI Ernst Gauhs (Deputy Chairman)	RWA Raiffeisen Ware Austria AG (AT)
Dr. Johann Schlederer (Deputy Chairman)	Verband Österreichischer Schweinebauern (Austrian Pork Farmers Union) (AT)
Francois Paybou	Euralis (FR)
Ruud Tijssens	Agrifirm (NL)
Florian Faber	ARGE Gentechnik-frei (Platform for GMO-Free Food Products) (AT)
Mag. Lukas Wiesmüller	Spar Österreichische Warenhandels-AG (AT)
Giorgio dalla Bona	Cereal Docks (IT)
Natalia Gordychuck	Agritema (UA)
DI Rudolf Bühler	Bäuerliche Erzeugergemeinschaft Schwäbisch Hall (Farmers Union Schwäbisch Hall) (DE)
Piero Ciriani	Soia Italia (IT)
MMag. Josef Willim	BAG Ölmühle (BAG Oil Mill) (AT)

DONAU SOJA PRESIDIUM

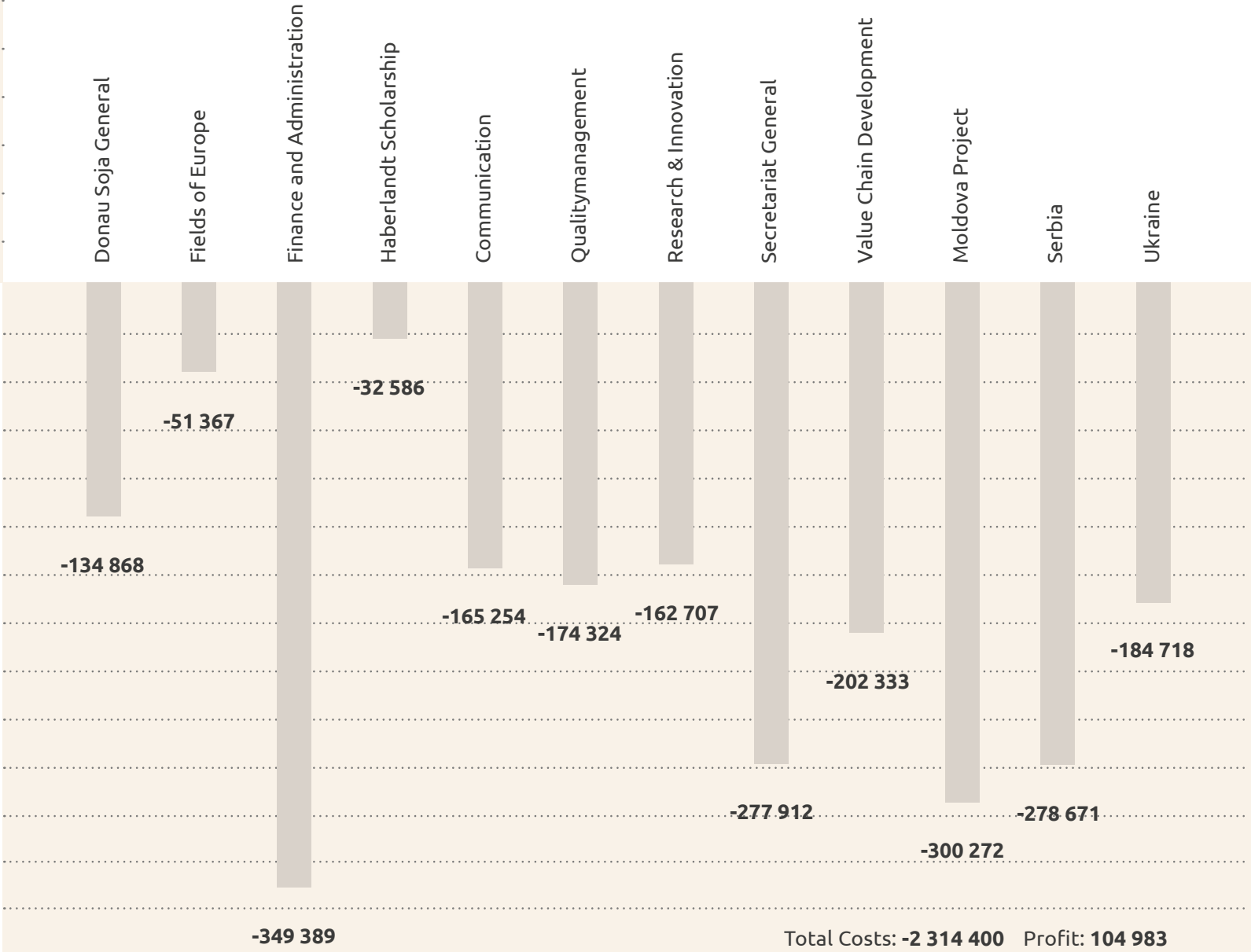
Anna Seiwert	Magyar Szoja Nonprofit Kft. (HU)
Jakub Lunter	Alfa Bio (SK)
Dr. Michael Gohn	Fritz Mauthner Handelsges.m.b.H. & Co KG (AT)
Daniele Marcomin	Oleificio San Giorgio SPA (IT)
Carsten Lentz Storm	Sodrugestvo (RU)
DI Adolf Marksteiner	Landwirtschaftskammer Österreich (AT)
Joachim Eder	Bayerische Landesanstalt für Landwirtschaft (DE)
Mag. Hermann Mittermayr	Bio Austria (AT)
Fortunat Schmid	Fenaco (CH)
Mladen Jovanovic	Victoria Group (RS)
Michaela Meyer	Edeka Handelsgesellschaft Südwest GmbH
DI Michael Wurzer	Zentrale Arbeitsgemeinschaft der Österreichischen Geflügelwirtschaft (ZAG, Central Consortium of Austrian Poultry Farmers) (AT)
DI Amos Ramsauer	Agriprotein GmbH (DE)

Annex 2

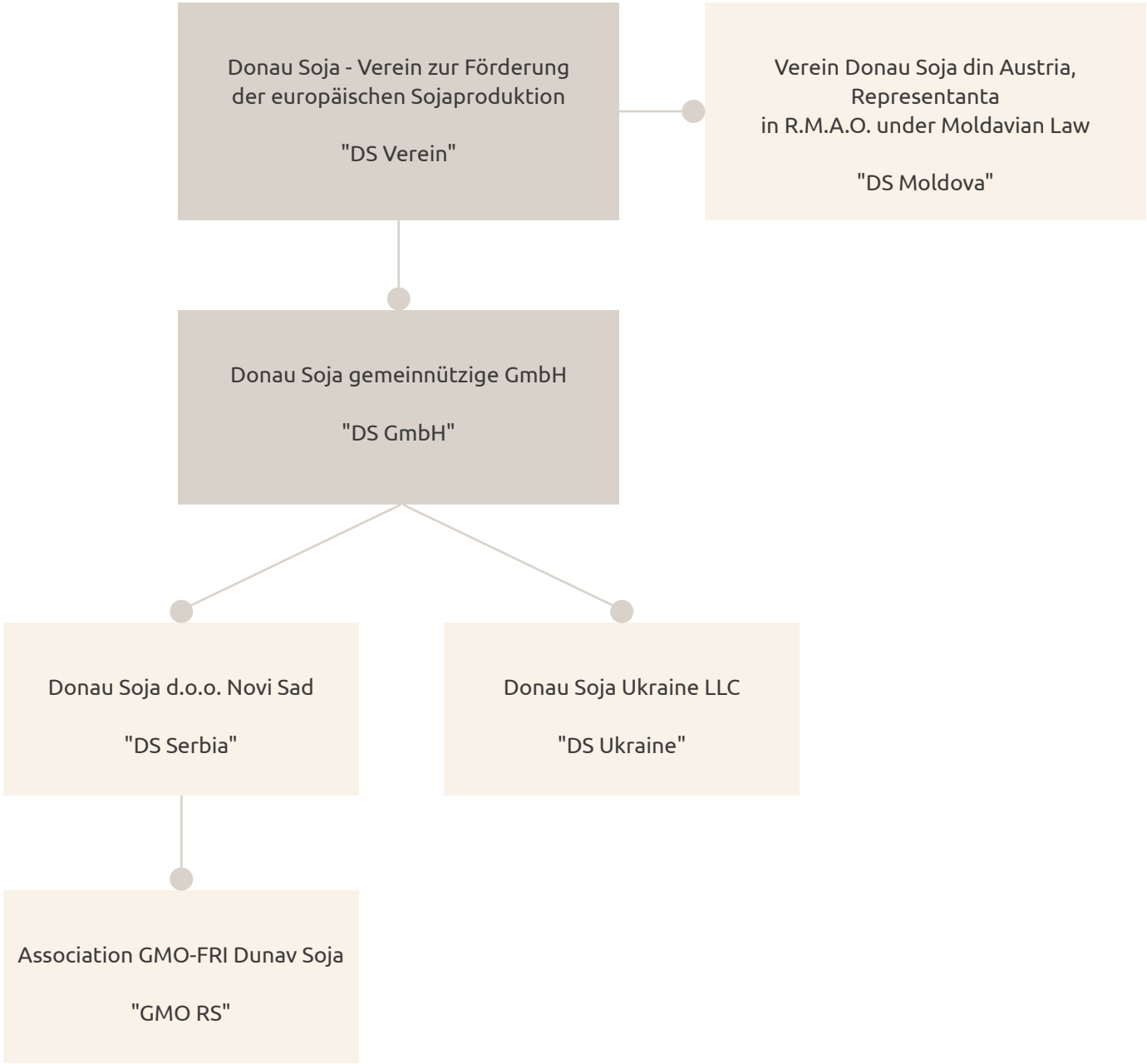
OUR FINANCIAL HIGHLIGHTS



Donau Soja Income Distribution 2019



Donau Soja Cost Distribution 2019



Donau Soja Entity Structure

FINANCIAL STATEMENTS

PROFIT AND LOSS STATEMENTS

	DS Verein	DS GmbH	GMO RS	DS Total
of Employees - 31.12.2019	3	14	1	32
of Staff Consultants - 31.12.2019	1	2	0	6
Memberships	401 857			401 857
License Fees		622 964		622 964
Underreproting and inspection fees		27 768		27 768
Protein Partnership		40 000		40 000
Fields of Europe		33 692		33 692
Grants	46 530	1 063 473	54 868	1 164 872
Events	24 824			24 824
Haberlandt	19 589			19 589
Other Income	65 385	171 084		236 469
Accrued Income	-6 735	-147 874		-154 608
Intercompany - Verein <> GmbH	1 955			1 955
Income from Verein / GmbH for Costs				0
INCOME	553 407	1 811 108	54 868	2 419 383
Cost of Materials / External Services	-136 077	-817 565		-953 642
Intercompany - Verein <> GmbH		-1 955		-1 955
Intercompany Donau Soja Serbia		-236 464		-236 464
Intercompany Donau Soja Ukraine		-123 257		-123 257
Intercompany Donau Soja Moldova	-40 585	-176 021		-216 606
Other Cost of Materials and other	-95 492	-279 869		-375 361
Staff Costs	-233 821	-696 123	-80 736	-1 010 681
Depreciation	-14 758	-3 039		-17 797
Other Expenses	-151 430	-173 587		-325 017
Interest and similar expenses	-2 444	-4 759	-60	-7 263
COST	-538 530	-1 695 074	-80 796	-2 314 400
Profit before Tax	14 876	116 034	-25 927	104 983
Tax Expenses	0	0	0	0
Net Profit	14 876	116 034	-25 927	104 983

Profit and Loss 2019
of DS Verein, DS GmbH
& GMO RS

	DS Serbia	DS Ukraine	DS Moldova
of Employees - 31.12.2019	7	3	4
of Staff Consultants - 31.12.2019	1	1	1
Memberships			
License Fees			
Underreproting and inspection fees			
Protein Partnership			
Fields of Europe			
Grants	41 096	30 588	0
Events			
Haberlandt	349	787	
Other Income			
Accrued Income			
Intercompany - Verein <> GmbH			
Income from Verein / GmbH for Costs	236 464	123 257	216 606
INCOME	277 908	154 631	216 606
Cost of Materials / External Services	-1 726		-61 768
Intercompany - Verein <> GmbH			
Intercompany Donau Soja Serbia			
Intercompany Donau Soja Ukraine			
Intercompany Donau Soja Moldova			
Other Cost of Materials and other	-1 726		
Staff Costs	-227 335	-46 907	-109 646
Depreciation	-4 601		-485
Other Expenses	-45 249	-104 148	-44 708
Interest and similar expenses	-1 097		
COST	-280 009	-151 055	-216 606
Profit before Tax	-2 100	3 576	0
Tax Expenses	-1 395	-643	
Net Profit	-3 495	2 933	0

Profit and Loss 2019
of DS Verein, DS GmbH
& GMO RS

BALANCE SHEET

ASSETS	Verein	GmbH	GMO RS	DS Total
Intangible Assets	48			48
Capital DS GmbH	10 000			10 000
Capital DS d.o.o. (Novi Sad)		19 924		19 924
Tangible Assets	5 890	6 595		12 485
Total Tangible & Intangible Assets	15 938	26 519	0	42 457
Stock (not yet invoiced)	12 003	53 414		65 417
Intercompany Verein <> GmbH	1 955			1 955
Other Receivables	10 048	53 414		63 462
Trade Receivables	96 278	210 067		306 344
Trade Receivables Grants			65 191	65 191
Tax and Staff Tax Receivables	14 680	19 482		34 162
Receivables DS Verein <> DS GmbH		34 502		34 502
Receivables DS Serbia <> DS GmbH				
Loan to GMO RS <> DS Serbia				0
Loan to DS Serbia <> DS GmbH		113 846		113 846
Other Receivables	6 150	44 271	145	50 566
Total Receivables	129 111	475 582	65 336	670 028
Cash / Bank	21 230	1 122 621	60	1 143 910
ARA	2 112	4 148		6 259
Total ASSETS	168 390	1 628 870	65 395	1 862 655

Balance Sheet 2019 of DS
Verein, DS GmbH & GMO RS

LIABILITIES	Verein	GmbH	GMO RS	DS Total
Base Capital	36 699	10 000		46 699
Retained Earning / Losses	1 944	27 563	543	30 051
Earnings/Losses in period	14 876	116 034	-25 927	104 983
Total Equity	53 520	153 597	-25 384	181 733
Provisions	10 211	38 696		48 907
<i>Bank Loans / Cash at Bank</i>	<i>16 591</i>	<i>255 703</i>		<i>272 295</i>
<i>Tax Liabilities from revenues/staff</i>	<i>5 655</i>	<i>30 163</i>		<i>35 818</i>
Accounts Payables	10 158	158 325		168 483
Other Payables	7 342	12 737		20 079
Total Payables	49 957	495 624	0	545 582
Liability to DS Serbia <> DS GmbH		1 906		1 906
Liability to DS Serbia <> GMO RS			90 779	90 779
Liability to ProDidactica <> DS GmbH		220 425		220 425
Liability to DS GmbH <> DS Serbia				0
Liability to DS Verein <> DS GmbH	34 502			34 502
Intercopmany Verein <> GmbH		1 955		1 955
PRA	30 411	31 306		61 717
Grants Prepayments deferred to next period		724 056		724 056
Total LIABILITIES	168 390	1 628 870	65 395	1 862 655

Balance Sheet 2019 of DS Verein, DS GmbH & GMO RS

ASSETS		LIABILITIES	
Intangible Assets	17		
Capital DS GmbH		Base Capital	19 924
Capital DS Serbia		Retained Earning / Losses	21 175
Tangible Assets	17 850	Earnings/Losses in period	-3 495
Total Tangible & Intangible Assets	17 867	Total Equity	37 603
Stock (not yet invoiced)	0	Provisions	
<i>Intercompany Verein <> GmbH</i>		<i>Bank Loans / Cash at Bank</i>	
<i>Other Receivables</i>	<i>0</i>	<i>Tax Liabilities from revenues/staff</i>	<i>9</i>
Trade Receivables	798	Accounts Payables	1 097
Trade Receivables Grants		Other Payables	
Tax and Staff Tax Receivables	357	Total Payables	1 106
Receivables DS Verein <> DS GmbH			
Receivables DS Serbia <> DS GmbH	1 906	Liability to DS Serbia <> DS GmbH	
Loan to GMO RS <> DS Serbia	90 779	Liability to DS Serbia <> GMO RS	
Loan to DS Serbia <> DS GmbH		Liability to ProDidactica <> DS GmbH	
Other Receivables	323	Liability to DS GmbH <> DS Serbia	113 846
Total Receivables	94 164	Liability to DS Verein <> DS GmbH	
		Intercopmany Verein <> GmbH	
Cash / Bank	32 757		
ARA	349	PRA	-7 419
Total ASSETS	145 136	Total LIABILITIES	145 136

Balance Sheet 2019 of DS Serbia

ASSETS		LIABILITIES	
Intangible Assets			
Capital DS GmbH		Base Capital	2 247
Capital DS d.o.o. (Novi Sad)		Retained Earning / Losses	23
Tangible Assets	2 650	Earnings/Losses in period	2 933
Total Tangible & Intangible&Financial Assets	2 650	Total Equity	5 204
Stock (not yet invoiced)		Provisions	
<i>Intercompany Verein <> GmbH</i>		Bank Loans / Cash at Bank	
<i>Other Receivables</i>		Tax Liabilities from revenues/staff	
Trade Receivables	2 573	Accounts Payables	647
Trade Receivables Grants		Other Payables	
Tax and Staff Tax Receiveables		Total Payables	2 887
Receivables DS Verein <> DS GmbH			
Receivables DS Serbia <> DS GmbH		Liability to DS Serbia <> DS GmbH	
Loan to GMO RS <> DS Serbia		Liability to DS Serbia <> GMO RS	
Loan to DS Serbia <> DS GmbH		Liability to ProDidactica <> DS GmbH	
Other Receivables	1 697	Liability to DS GmbH <> DS Serbia	
Total Receivables	4 270	Liability to DS Verein <> DS GmbH	
		Intercopmany Verein <> GmbH	
Cash / Bank	1 170		
ARA		PRA	
Total ASSETS	8 090	Total LIABILITIES	8 090

Balance Sheet 2019
of DS Ukraine

ASSETS		LIABILITIES	
Intangible Assets			
Capital DS GmbH		Base Capital	845
Capital DS d.o.o. (Novi Sad)		Retained Earning / Losses	
Tangible Assets	4 395	Earnings/Losses in period	0
Total Tangible & Intangible&Financial Assets	4 395	Total Equity	845
Stock (not yet invoiced)		Provisions	
<i>Intercompany Verein <> GmbH</i>		Bank Loans / Cash at Bank	
<i>Other Receivables</i>		Tax Liabilities from revenues/staff	
Trade Receivables	4 574	Accounts Payables	259
Trade Receivables Grants		Other Payables	10 068
Tax and Staff Tax Receiveables	618	Total Payables	10 327
Receivables DS Verein <> DS GmbH			
Receivables DS Serbia <> DS GmbH		Liability to DS Serbia <> DS GmbH	
Loan to GMO RS <> DS Serbia		Liability to DS Serbia <> GMO RS	
Loan to DS Serbia <> DS GmbH		Liability to ProDidactica <> DS GmbH	
Other Receivables	22	Liability to DS GmbH <> DS Serbia	
Total Receivables	5 215	Liability to DS Verein <> DS GmbH	
		Intercopmany Verein <> GmbH	
Cash / Bank	1 563		
ARA		PRA	
Total ASSETS	11 173	Total LIABILITIES	11 173

Balance Sheet 2019
of DS Moldova

MEMBERSHIP BENEFITS

Donau Soja is an international, not-for-profit, multi-stakeholders, value chain organisation. We have the honour to invite you to join the Donau Soja Association and the European business community that develop the non-GM soya sector and contribute to the European Protein Transition together with market leaders who are already our members.



**Get connected with
key market players
and your potential
business partners**

Donau Soja supports members in accessing potential buyers and partners. We facilitate specific requests and link members individually. Members receive access to exclusive B2B networking events.



**Support in
implementing our
standards: We
support you every
step of the way in
achieving compliance
with Donau Soja's
standards**

Members get free advice on how to gain compliance with the standards (Donau Soja Standard, Europe Soya Standard and Non-GM Danube Region Standard), and how to use our trademarks.



Advocacy & PR:
benefit from our
strong support
in advocating a
sustainable and
European protein
supply

We take action and support discussions about the future of soya on global and European markets. We work with governments and authorities to create a better regulatory environment at national and EU levels.



**Increase your brand
impact**

Members pay reduced fees at our congresses and events. Moreover, Donau Soja will give visibility to your company & brand for advantageous fees.



**Market updates:
receive the latest
news on the
sustainable soya
market situation in
Europe**

Members enjoy access to our event calendar, receive Donau Soja newsletters and monthly market reports on KPIs related to the soya market.



Access to best practices in sustainable soybean production & participation in research projects

Members can get involved in Donau Soja Field Days at reduced fees and receive first-hand information about input performance in different areas of the Danube region. Moreover, you will get a chance to become part of our research community and receive scientific research updates.



Shape the future of the Donau Soja Association

As a member of our Association, you will be involved in the decision-making processes of the Donau Soja Association. You will elect Donau Soja bodies and have the right to vote at our General Assembly.

OUR MEMBERS

MORE THAN 280 MEMBERS FROM 25 COUNTRIES UNITED BY JOINT VISION



Agrarhandel Hoffmann GmbH | Agricultural Research & Development station Turda | Agrogonzalo 2014 S.L. | Aldi Suisse | Anzengruber Josef | Auf der Landwehr GmbH | Beinhundner Klaus | Bokelmann GBR | Conviva Group GmbH | Durlacher GmbH | Eierproduktion Müller | Engelel Franz | Geflügelhof Land Obermeier | Geflügelhof Teichwiden | Geflügelhof Wirtz | Grain & Feed Chamber | Grim Management Services B.V. | Hölzl Franz | Hubert Haager Neumühle | ITC Agrar GmbH | Kammerberger Alfred e.U. | Lambrrecht Josef | Livada Elisabeta | LLC Auro Luchki | Manufaba | Metz Rosmarie | Mittlerer GmbH | Mlynischej LLC | MTO Esti Sojaliti | my lab International GmbH | Oriental Lotus Food Trade and Investment GmbH | RWA Slovakia | Saathbau Polska | Sandmayr Alfred | SC Agrotirneasa SRL | Schrrall GesnRb | Schubert Andrea | SC Orapic SRL | SC Tober Aaro SRL | SC Transapicola | Synthesis Agro Konsalting | Tatschl Productions GmbH | Ukrainian Association of Producers and Processors of Soy | Werkovits Frischeiser und Teigwaren OG

The status as for 2019 year

