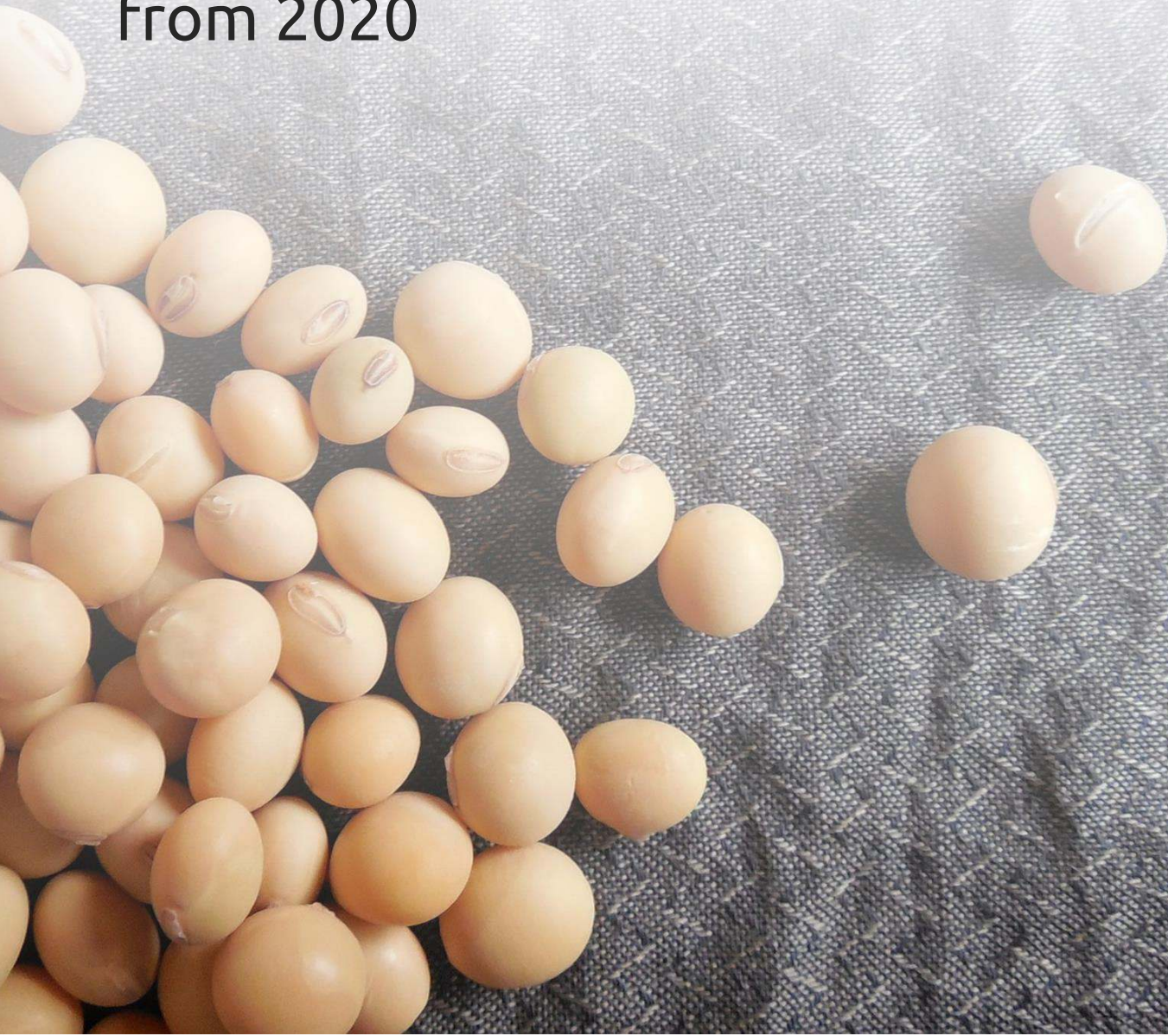


DONAU SOJA

HIGHLIGHTS, FACTS & FIGURES
from 2020



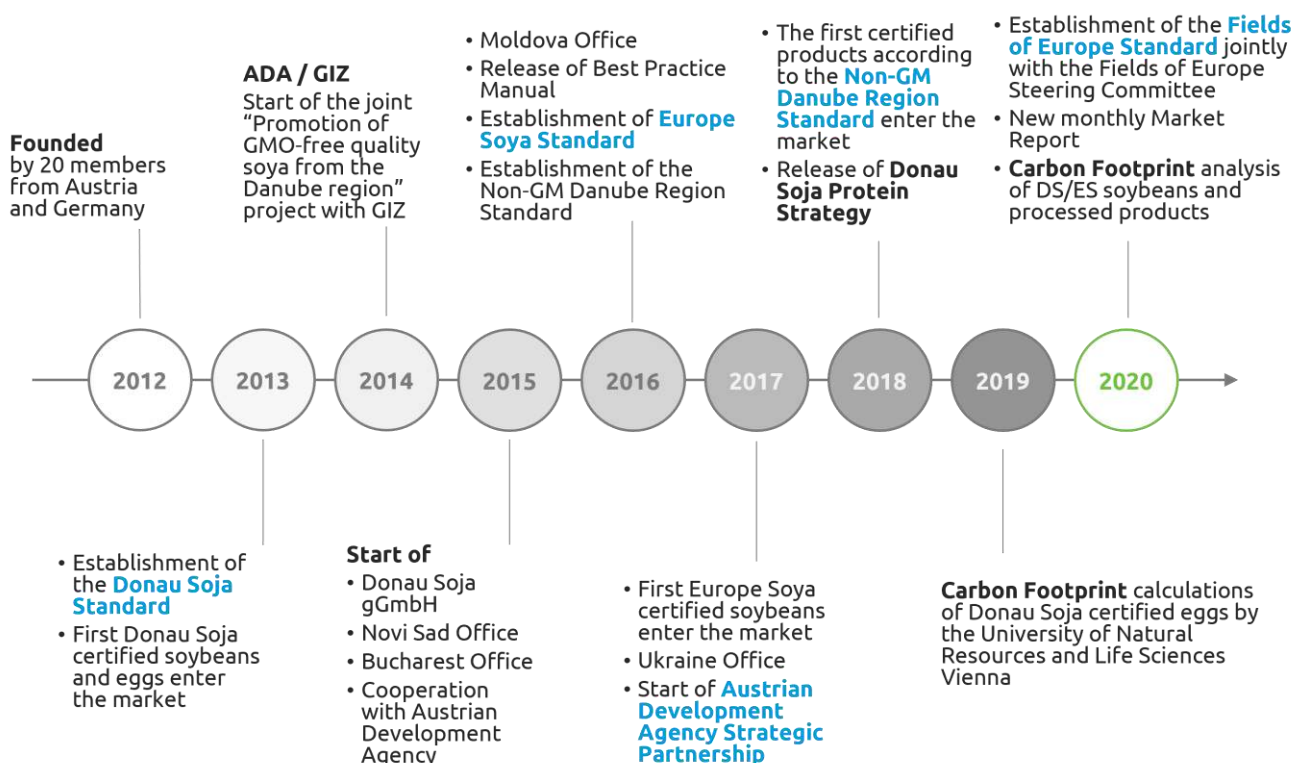
ABOUT DONAU SOJA

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.

Prominent European institutions and organisations support this ambitious initiative. Our 283 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 the Non-GM Danube Region Standard. The activities of Donau Soja are supported by the Austrian Development Agency (ADA).



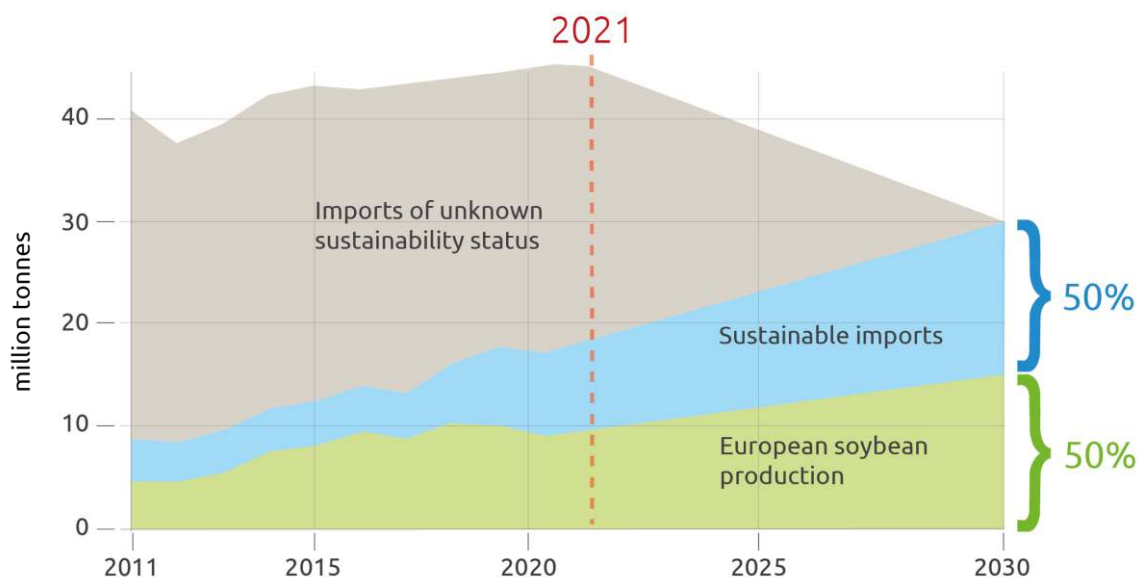
OUR VISION

A SUSTAINABLE AND SAFE EUROPEAN PROTEIN SUPPLY

The production of soybean has doubled in the last decade in Europe (the European Union and other European countries) and now stands at about 10 million tons. Despite this, Europe still has a substantial plant protein deficit that is met by the import of soybean and soybean meal equivalent to nearly 40 million tonnes of soybean.

For Donau Soja, the reduction of the European protein deficit met from sustainable sources is an important element of a sustainable agri-food system. This will result from the combination of

reduced overall demand for high-protein materials reducing the total soybean requirement to 30 million tonnes. Half of this demand is met by further increases in production of soybean to 15 million tonnes of soybean. For the remaining import quantities, we envisage that environmental and social sustainability criteria in the exporting countries needs to be fulfilled. Certification schemes can therefore play an important role. We consider that the realisation of this vision as feasible by 2030.



Donau Soja Vision for a sustainable soybean consumption and sourcing in Europe.

UNDERLYING ASSUMPTIONS

Our agri-food system needs to change in several different ways to reduce Europe's dependency on imported soya. We regard these changes as ambitious, but realistic to accomplish:

Firstly, soybean production needs to grow from today's 10 million tonnes by about 50% to 15 million tons.

Secondly, European soybean consumption needs to contract from about 45 million tonnes to 30 million tonnes soybean equivalents. This change will be substantial, but we see already today developments and megatrends which are contributing:

1. increasing production of other grain legumes in Europe will substitute for soybean. This meets the growing demand for non-GM or organic products and

can support regional/local value-chains;

2. improved use of grasslands as an existing protein resource and development of new protein resources (e.g., algae culture);
3. increasing efficiency in feeding protein through precision feeding and improved feeding strategies;
4. consumer change towards more plant-based protein diets.

Read more in our Donau Soja Protein Strategy for Europe: www.donausoja.org/en/about-us/news/ds-protein-strategy-for-europe/

AT A GLANCE

Organisation: International, not-for-profit, multi-stakeholder, independent

Vision: Sustainable, Safe & European protein supply

Members: **283** members from **26** countries

Goals: Support a **sustainable** European soya production Establish **local & safe** supply chains

Activities

- Market Development
- Agriculture
- Research & Innovation
- Policy formation
- **Certification**
- B2B meetings
- Market analyses
- **Protein Partnerships** – an alternative to credits from overseas

Offices



Vienna
(Austria)



Novi Sad
(Serbia)



Chişinău
(Moldova)



Kyiv
(Ukraine)

Donau Soja & Europe Soya

are leading standards for the European soya sector in terms of quality and quantity



610,000 t
of soya beans



almost **900**
certified partners



34
primary processors
(oilmills and small enterprises) with ES/DS/non-GM Danube Region Standard certification

✓ non-GM ✓ sustainable
✓ controlled European origin

Additionally with volumes within the **Protein Partnership** programme, the potential volume of certified tons adds up to



1,000,000 t

OUR MEMBERS

283 Members from 26 countries united in joint vision



Kogelmann Robert | Hamex AG | Geflügelhof Aigner KG | Höller's Freilandeier | Enengel Franz | Sandmayr Alfred | SC Agrotirnav SRL | Lambrecht Josef | WWF Deutschland | Mitterer GmbH | SC Transapicola | Saatbau Polska Sp.z.o.o. | Schubert Andrea | Beinhundner Klaus | Astrid & Franz-Josef Telohe GbR | Bokelmann GbR | Agricultural Research & Development station Turda | Auf der Landwehr GmbH | Metz Rosmarie | MTÜ Eesti Sojaliit | Oriental Lotus Food Trade and Investment GmbH | Anzengruber Josef | Tatschl Produktions GmbH | Hölzl Franz | Vredeseilanden vzw (VECO Belgium) | Eierproduktion Mantler | Agrogonzalo 2014 S.L. | Brunner Helmut | Agro Luchky LLC | Livada Elisabeta | Mlynyshe LLC | Grim Management Services B.V. | Tauss GmbH | Bravo Agro Protein | CLI-Ins EURL | MobiMill Limited Liability Company | Lidl Stiftung | For Farmers Beelitz GmbH | Agriholism SRL | Bentia Dana | ATAR AGTEK d.o.o. Novi Sad | RAGT Saaten Österreich GmbH | Saatbau Deutschland | Aldi South Group | Hofer KG

List of Members as of September 2021

MEMBERSHIP BENEFITS



Shape the future of Donau Soja

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.



Get connected with key market players and strengthen your network

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



Market updates: receive the latest news on non-GM soya market

Members receive Donau Soja market reports on the non-GM soya market and regular newsletters. Moreover, we facilitate market information exchange between members upon request.



Support in implementing our Standards

We support your every step in achieving compliance with Donau Soja's Standards. Members get free consultation on how to gain compliance with our widely acknowledged Standards (Donau Soja Standard, Europe Soya Standard and Non-GM Danube Region Standard), and how to use our trademarks.



Increase your brand visibility

Meet your potential business partners at congresses, exhibitions and fairs by sharing the booth with Donau Soja. You will gain visibility yet save time and money. Moreover, members benefit from a discount at our congresses and events.



Participation in demo fields and field days

Members can get involved in Donau Soja demonstration platforms (demo fields) at reduced fees and test, analyse and promote their products. Moreover, you will get a chance to become part of our research community and receive scientific research updates.



Showcase your carbon footprint reduction with Donau Soja

Together with us, you can showcase your carbon footprint reduction in your product resulting from the use of Donau Soja certified products. Recent studies carried out by an independent scientific institution show: Our Standards reduce the carbon footprint of pork and egg products by about 40%.



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

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

AVAILABILITY OF CERTIFIED BEANS

After harvest 2020, Donau Soja & Europe Soya certified partners from 12 different European countries reported a total of 610,000 tonnes of soybeans in their storages. Soybeans under the Donau Soja & Europe Standard fulfil rigid criteria and our partners are certified by accredited

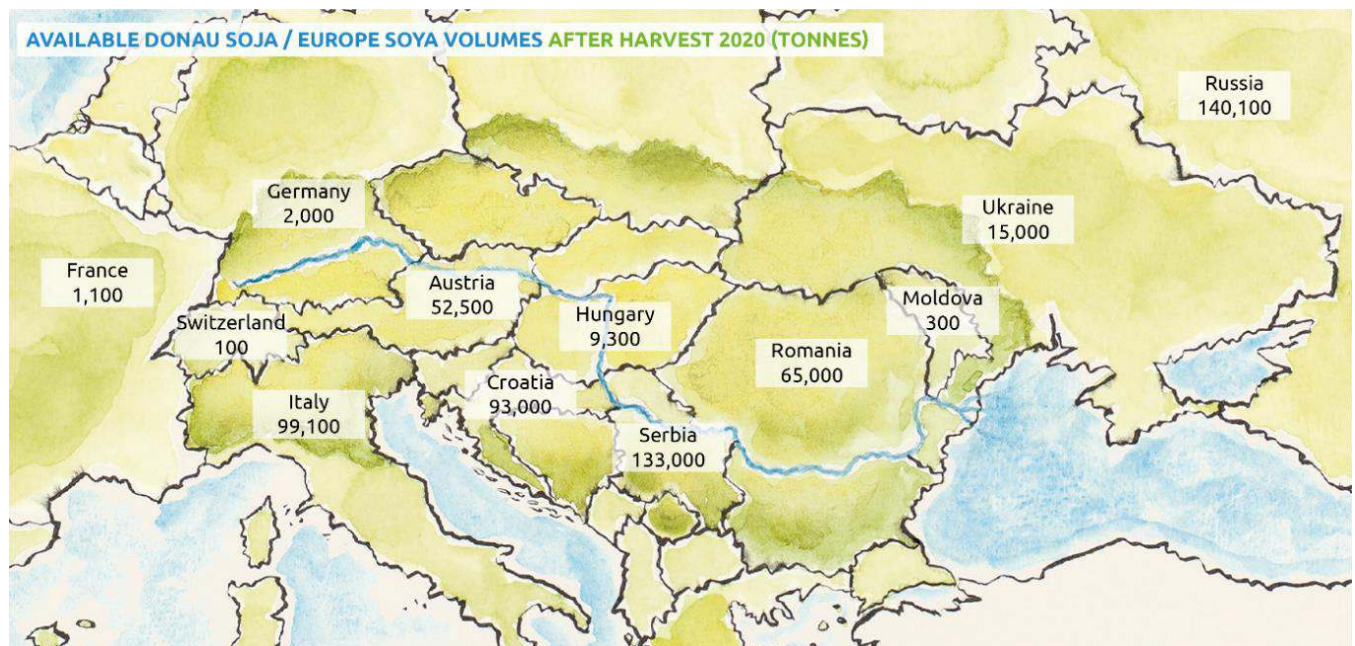
certification bodies. When sourcing Donau Soja & Europe Soya certified soya, one can rest assured to buy high-quality, non-GM, traceable, deforestation-free and sustainable commodities from Europe, creating added value for the region.

EUROPE SOYA **DONAU SOJA** are
leading standards
for the **European**
soya sector in terms
of quality and quantity

Certified volume in 2020



≈10%
of the total
non-GM soya
production
in Europe



Availability of Donau Soja & Europe Soya certified soybeans by storage location

A PROMISING FUTURE

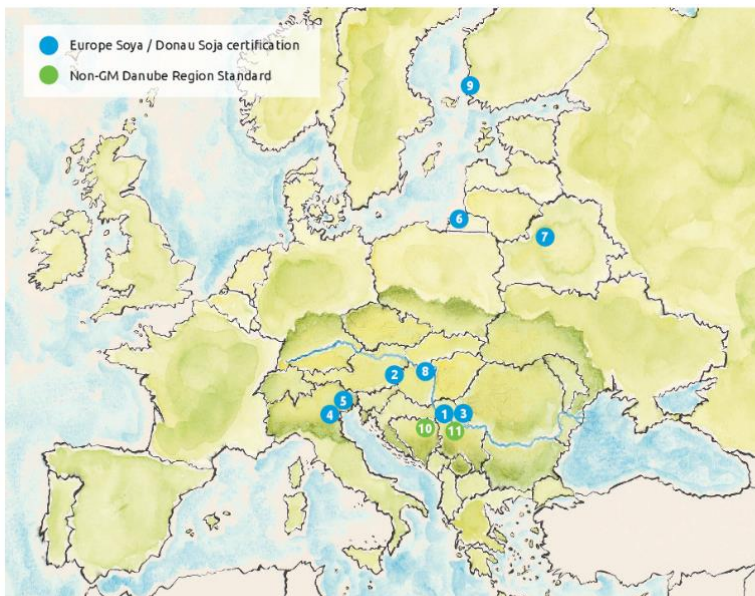
In the upcoming years even larger quantities of certified soybeans can be made available: Up to 1,000,000 tons – thanks to Protein Partnership programmes and their supporters. **Protein Partnerships** can be seen as the European interpretation to credits from overseas. By

supporting local soya farmers in the main growing regions of South-Eastern Europe, retailers and major food brands make a valuable contribution to building up resilient supply chains from and for Europe.

A CRUCIAL PART OF THE VALUE CHAIN

Soybean processors certified under the Donau Soja & Europe Soja Standard are vital when it comes to the distribution of processed soya products. The number of businesses committed to sustainable and traceable European production, is constantly growing. These companies offer

certified high-quality soya products for animal feed or for human consumption. Their products are ranging from soybean meal, soya protein concentrates, press cake, toasted soybeans to oil or lecithin.



Oil mills with ES/DS certification:

01. Sojaprotein, Becej (RS) – DS
02. BAG, Güssing (AT) – DS
03. Bioprotein, Obrenovac (RS) – DS
04. Cereal Docks, Camisano (IT) – ES+DS
05. Oleificio, San Giorgio (IT) – ES
06. Sodrugestvo, Kaliningrad (RU) – ES
07. Belagrotterminal, Smorgon (BY) – ES
08. Vandamme, Komárom (HU) – DS
09. Nordic Soya Oy (FI) – ES



Non-GM Danube Region Standard

10. Bimal, Brcko (BiH)
11. Mistral Komerc, Temerin (RS)

DS = Donau Soja
ES = Europe Soja



Other certified primary processors

Austria

Fuchshuber Agrarhandel GmbH
Garant Tiernahrung GmbH Werk Pöchlarn
Gsellmann Mischfuttererzeugung GmbH
H. Lugitsch Partner - Biokorn GmbH
Ing. Martin Stumpf, Die Hühnerrei
Innöl CoKG
MH Agrarhandel GmbH
Mischfutterwerk Großsiedl GmbH
Mitterer GmbH
Seierl Landesprodukte GmbH
Tatschl Produktions GmbH

Uitz - Mühle GesmbH
Unser Lagerhaus Warenhandels GmbH
Witzmann Mühle GmbH

France

Lienhart Sojameal

Germany

Kraichgau Raiffeisen Zentrum eG

Romania

Agrotirnav S.R.L.

Serbia

Agrodjole d.o.o.

Animal Commerce d.o.o.
Vin Farm d.o.o.

Switzerland

Hamex AG
Weinlandmühle Trüllikon Glanzmann AG

Tofu producers

Finland

Oy Soya Ab Jalofoods

Germany

ALFA BIO s.r.o. / LUNTER

Last update: September 2021

NON-GM SOYA UPDATE

An Overview of the European Non-GM Soya Market

 Austrian
Development
Agency



This is a monthly market report with a special focus on the European non-GM soya market. It provides unique information on

- recent market developments
- production forecasts
- non-GM prices / premiums
- supply & demand estimates

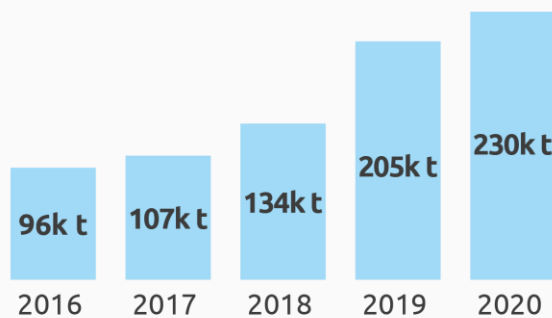
To learn more information about the publication, please feel free to contact the following e-mail address: marketinfo@donausoja.org



WHERE THE BEANS FLOW

From the soybean processing, the soya products end up in various branches. The lion share of Donau Soja & Europe Soya products ends up in feedstuff for livestock production such as poultry or pig, followed by fish feed for Scandinavian aquaculture. A smaller, but steadily growing, share goes into the production of plant-based products such as tofu or vegan burgers.

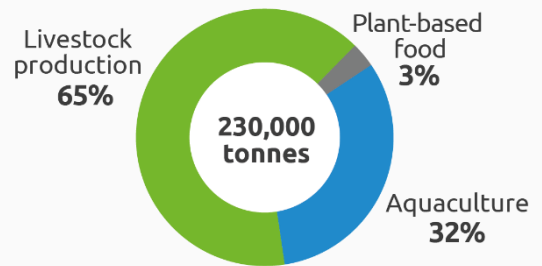
Development of market uptake:



Top 3 consumers of certified feed (2020):

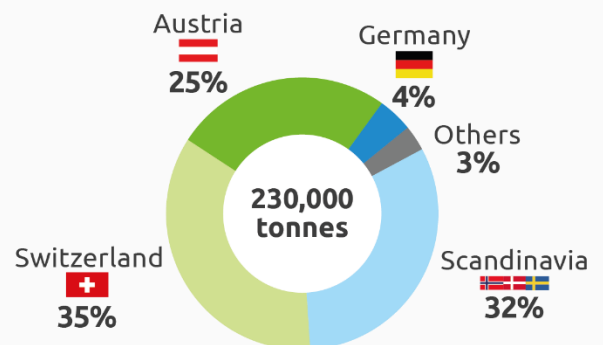


Market uptake by sector (2020):



The volume of certified beans that end up in final consumer products is steadily growing and reached a **record of 230,000 tons in 2020**, despite any interruptions due to the ongoing pandemic. While this is a positive and promising trend, there is still plenty of room for growth and we continue to support companies and even entire sectors all across Europe that decide to change to sustainable, certified soya from Europe.

Market uptake by country (2020):



STANDARD REVISION DONAU SOJA / EUROPE SOYA STANDARD

In March 2020 Donau Soja started the current revision process of the Donau Soja / Europe Soya Standard. In course of revising our Standards, Donau Soja

- defined **10 Principles** of Donau Soja / Europe Soya cultivation,
- defined **78 criteria** for soya production within

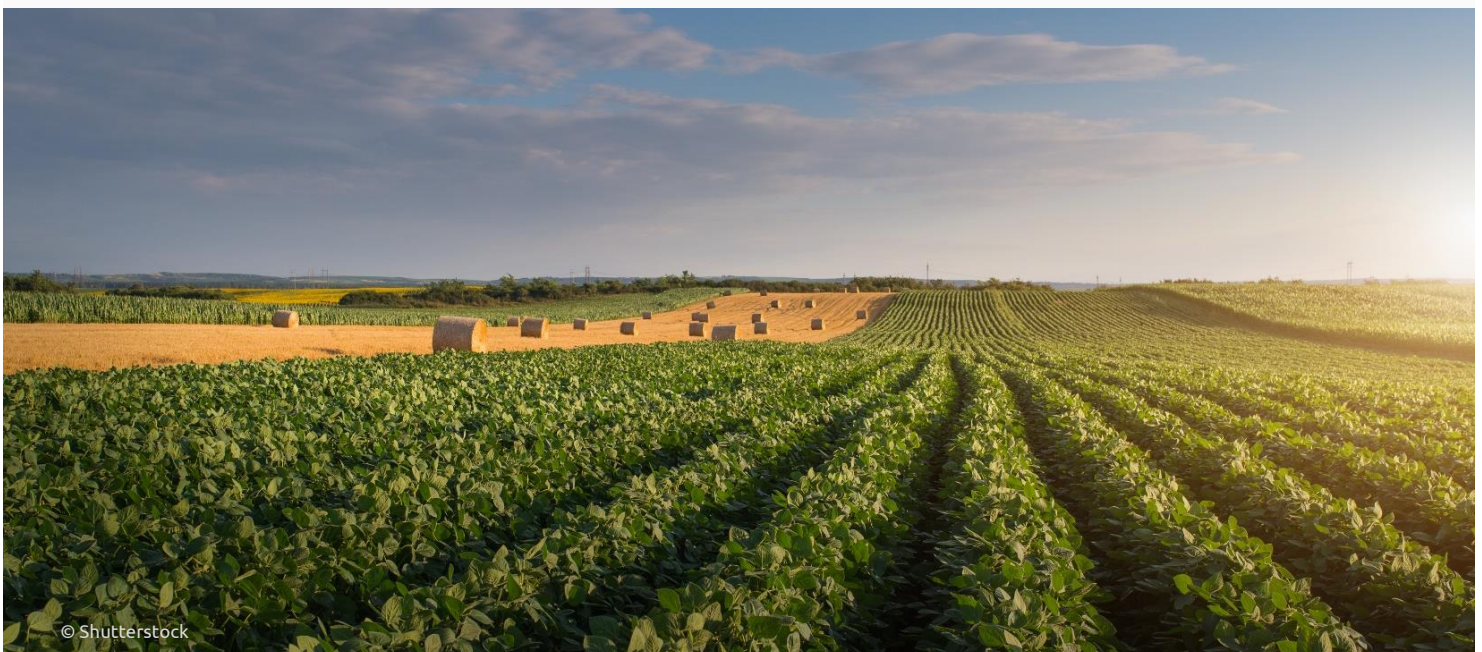
these principles based on existing requirements and EU legislation,

- created **a glossary** that goes along with the 10 Donau Soja / Europe Soya principles and explains all relevant terms and definitions and
- improved the risk-based inspection system and introduced **3 new risk categories**.

Timeline of the Donau Soja / Europe Soya Standard revision


























For more information visit our website:
www.donausoja.eu/standard-revision



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SUSTAINABILITY BENCHMARKING OF DONAU SOJA / EUROPE SOYA STANDARD

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

 <p>Donau Soja/ Europe Soya is accepted by FEFAC as one of 18 sustainable sourcing standards</p> <p>Europe </p>	 <p>Dansk Alliance for Responsible Soy recognises Donau Soja / Europe Soja as one of the standards that address the criteria for responsible soy sourcing</p> <p>Denmark </p>	 <p>Swedish Soy Dialogue accepts Donau Soja/ Europe Soya as one of 4 sustainable soya sourcing standards</p> <p>Sweden </p>	 <p>Swiss Soy Network defines Donau Soja/ Europe Soya as one of 5 sustainable sourcing standards</p> <p>Switzerland </p>
 <p>UK Roundtable on Sustainable Soya assessed and recommends Donau Soja / Europe Soya as one of 10 sustainable soya sourcing standards</p> <p>United Kingdom </p>	 <p>The Aquaculture Stewardship Council (ASC) recognises Donau Soja / Europe Soya as one of three responsible soy sourcing standards</p> <p>Europe </p>	 <p>Thünen Institut Germany recommends Donau Soja/ Europe Soya as one of 6 sustainable soya sourcing standards</p> <p>Germany </p>	 <p>IUCN recommends Donau Soja/ Europe Soya as one of 6 sustainable sourcing standards</p> <p>The Netherlands </p>
 <p>WWF Germany recommends Donau Soja/ Europe Soya as one of 4 sustainable sourcing standards</p> <p>Germany </p>	 <p>Greenpeace Austria rated Donau Soja as „reliable and sustainable“ product label</p> <p>Austria </p>	 <p>RELIABLE</p> <p>Donau Soja stands for strictly controlled regional and non-GM soya, with individual criteria going beyond this. There is still room for improvement in pesticide use and crop rotation. Greenpeace rates Donau Soja as trustworthy.*</p>	
		 <p>VLOG recognizes Donau Soja/ Europe Soya certification as equivalent to VLOG standard certification</p> <p>Germany </p>	

DONAU SOJA / EUROPE SOYA: A CLIMATE FRIENDLY ALTERNATIVE

Since March 2020, Donau Soja commissioned the Research Institute of Organic Agriculture (FiBL) Austria to investigate how using Donau Soja / Europe Soya-certified soya products impacts the carbon footprint of food and feed products.

The main result: By using Donau Soja / Europe Soya we can avoid roughly 40% of greenhouse gas emissions in livestock products and even more in feed products.

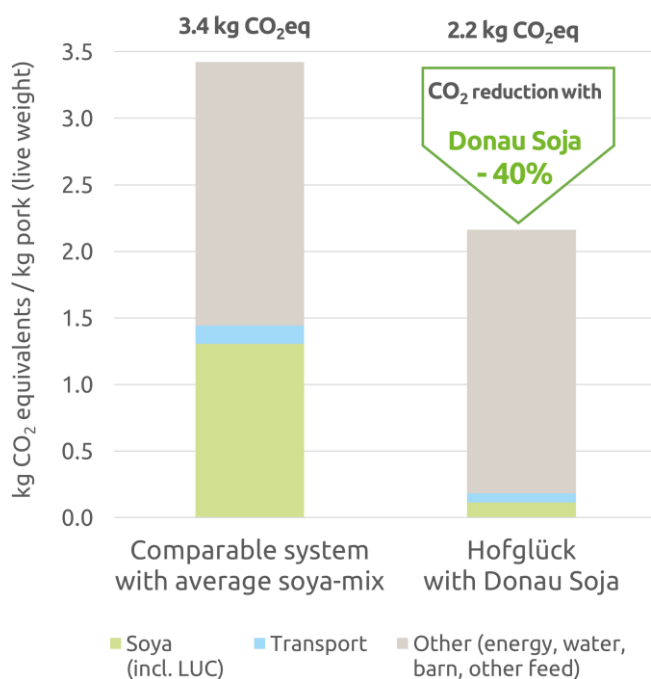
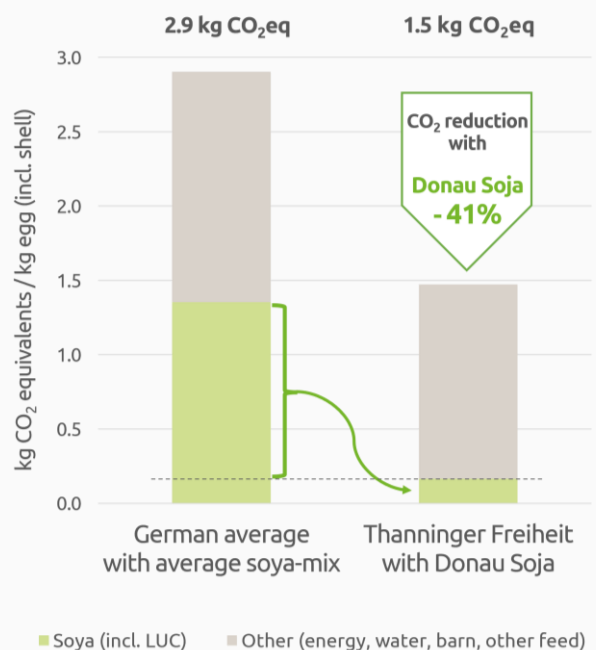


Eggs of premium brand „Thanninger Freiheit“ by poultry farm Aigner

Partner: Aigner Geflügelhof GmbH & Co. KG

Data collection: September-October 2020 at poultry farm Aigner in Bavaria, Germany

Results: The use of Donau Soja-certified soya feed in Thanninger Freiheit eggs reduces CO₂ emissions by 41% when compared to an average German egg production.



Pork of premium brand „Hofglück“ by German retailer EDEKA

Partner: EDEKA Südwest Fleisch GmbH

Data collection: April-June 2020 at 12 EDEKA Hofglück farms in Baden Württemberg, Germany

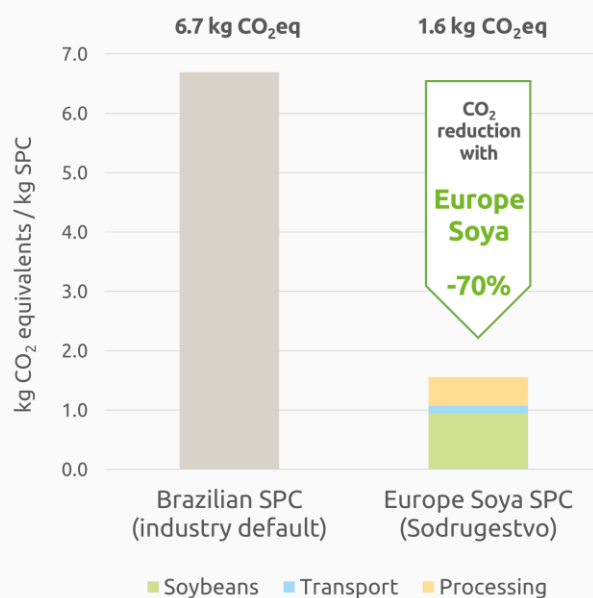
Results: By using Donau Soja / Europe Soya-certified soya feed, the CO₂ emissions of Hofglück pork are 40% lower than a comparable pork production system with average feed.

Soy Protein Concentrate (SPC) by Sodrugestvo Group

Partner: Sodrugestvo Group

Data collection: July until September 2020 at Sodrugestvo Group plant in Kaliningrad, Russia

Results: The carbon footprint of Europe Soya-certified SPC is 70% smaller compared to an average Brazilian SPC (according to Agri-Footprint 4.0).



Additional information on the studies conducted in 2020 as well as the results from additional studies on pork production in Austria and Germany conducted in 2021 are available on our website www.donausoja.eu.

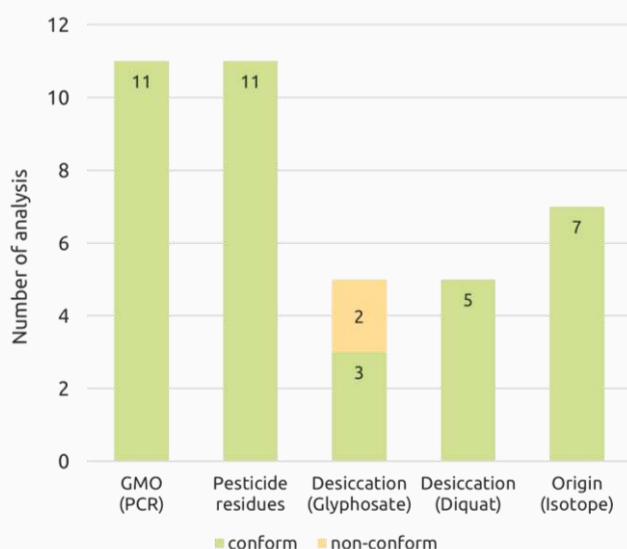
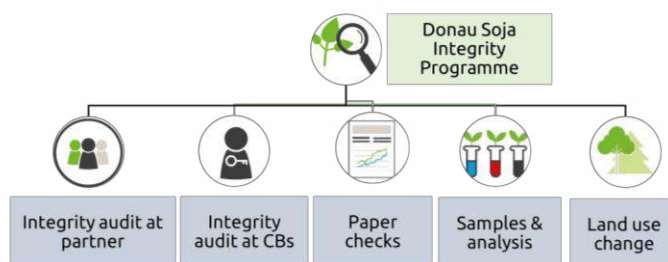


QUALITY MANAGEMENT

For ensuring compliance and improving quality within our certification system

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.



Rigorous testing for compliance with our requirements

The Donau Soja Integrity Program ensures the compliance with our Donau Soja and Europe Soya Standard and the integrity of the entire system, including integrity audits at partners and certification bodies, witness audits and laboratory analysed of soya bean and soya products. In 2020, Donau Soja conducted in total 33 analyses of soybeans and soya produces. Thereof 12 for contaminations with GMO, 11 for general pesticide residues, 10 for desiccation (5 for Glyphosate residues and 5 for Diquat).

Our work in 2020 at a glance:

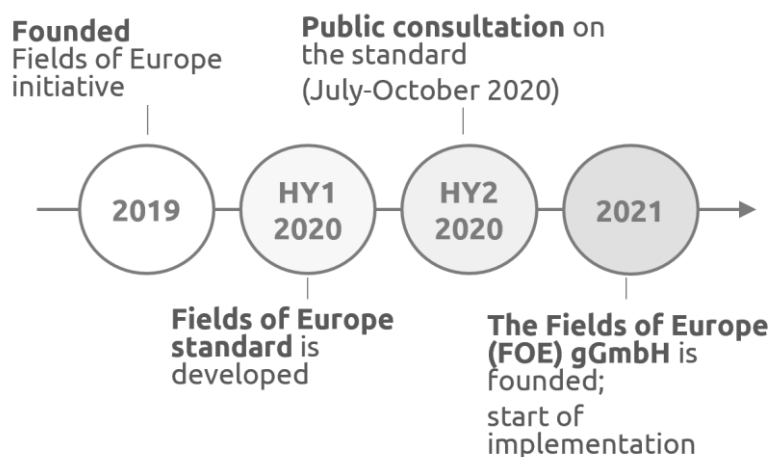


FIELDS OF EUROPE:

THE EUROPEAN FOOD AND FEED STANDARD

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, Fenaco and Nevedi aimed to create a

standard that meets the demand for European products. The standard is being developed for companies in the feed and food supply chain that wish to produce and market feed or food products with non-GM ingredients from Europe which are produced in a sustainable way.



JOIN US!

The group of founding members take seat in the steering committee. New companies and organisations are very welcome to join the initiative and take place in the user group and ad-hoc working groups. Donau Soja provides the Fields of Europe Secretariat.

For more information about Fields of Europe:

Contact the project secretariat:
info@fieldsofeurope.org.

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



The project to develop a European feed and food standard is supported by the Austrian Development Agency.



PROTEIN PARTNERSHIPS

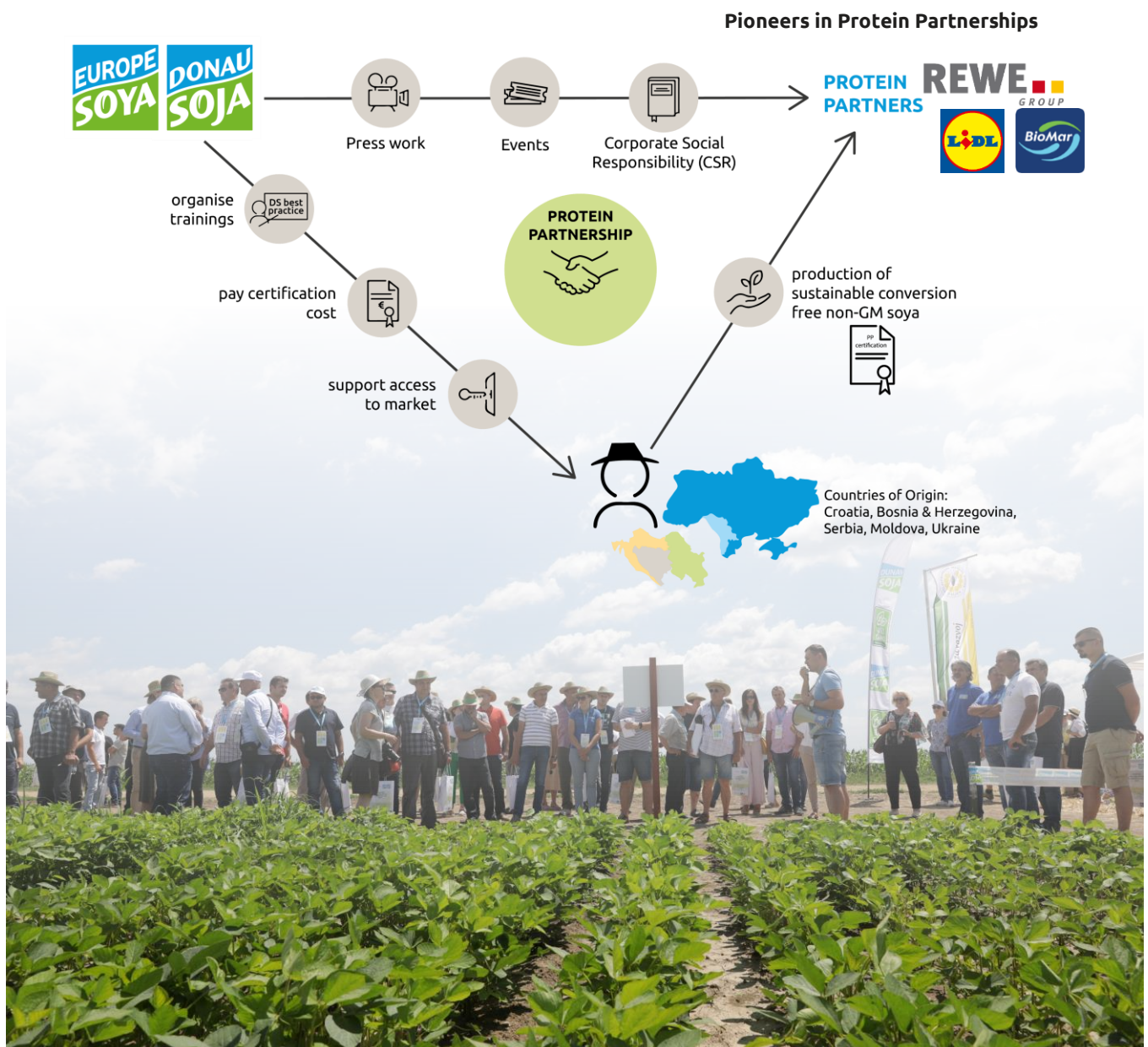
A programme to increase sustainable soya production in Europe, for Europe

Protein Partnerships are designed as an alternative to credits from overseas. Protein Partnerships are a simple tool for supporting and building up safe and sustainable non-GMO soya supply chains in Europe, and at a relatively low cost compared to physically segregated and certified products. They also strengthen the first link in the physical value chain, as well as investing in training and certifying farmers and primary collectors.

Donau Soja Protein Partnerships are a joint programme with the Austrian Development Agency (ADA) and primarily offered in non-EU

countries like Serbia and Ukraine where they have the biggest impact in terms of both volumes and sustainability.

In 2020 REWE Germany, LIDL international and BioMar had partnerships in Serbia and Croatia, in 2021 LIDL international enlarged its volume for the first time into Ukraine.



NEWS FROM THE FIELDS

A major part of Donau Soja's efforts to develop European non-GMO sustainable soybean production is to disseminate best practices in soybean cropping. Donau Soja provides educational resources (handbooks and videos) and organises field days and trainings to support

farmers in cultivating soya sustainably and add value to their products. Due to the Covid-induced restriction, we strengthened in 2020 our online services and produced videos and organised several online meetings.

2  Field days	3  Online Field days
13 Platforms with field tests in	3 countries
7 Seminars or workshops with	211 participants
2 Handbooks in regard to organic production published in Moldova and Serbia.	
4 Editions of the Donau Soja Best Practice Manual published and printed in Croatian, Serbian, Romanian and Russian.	
123 Samples of soybeans and soya produces analysed within a study with	30 Soya processing enterprises



COMMUNICATION FOR CHANGE

Awareness raising is a key activity of Donau Soja and it supports transparency of market information and promotes business development. In 2020, we hosted 43 events and meetings which were due to the global pandemic organised primarily as online events. 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.

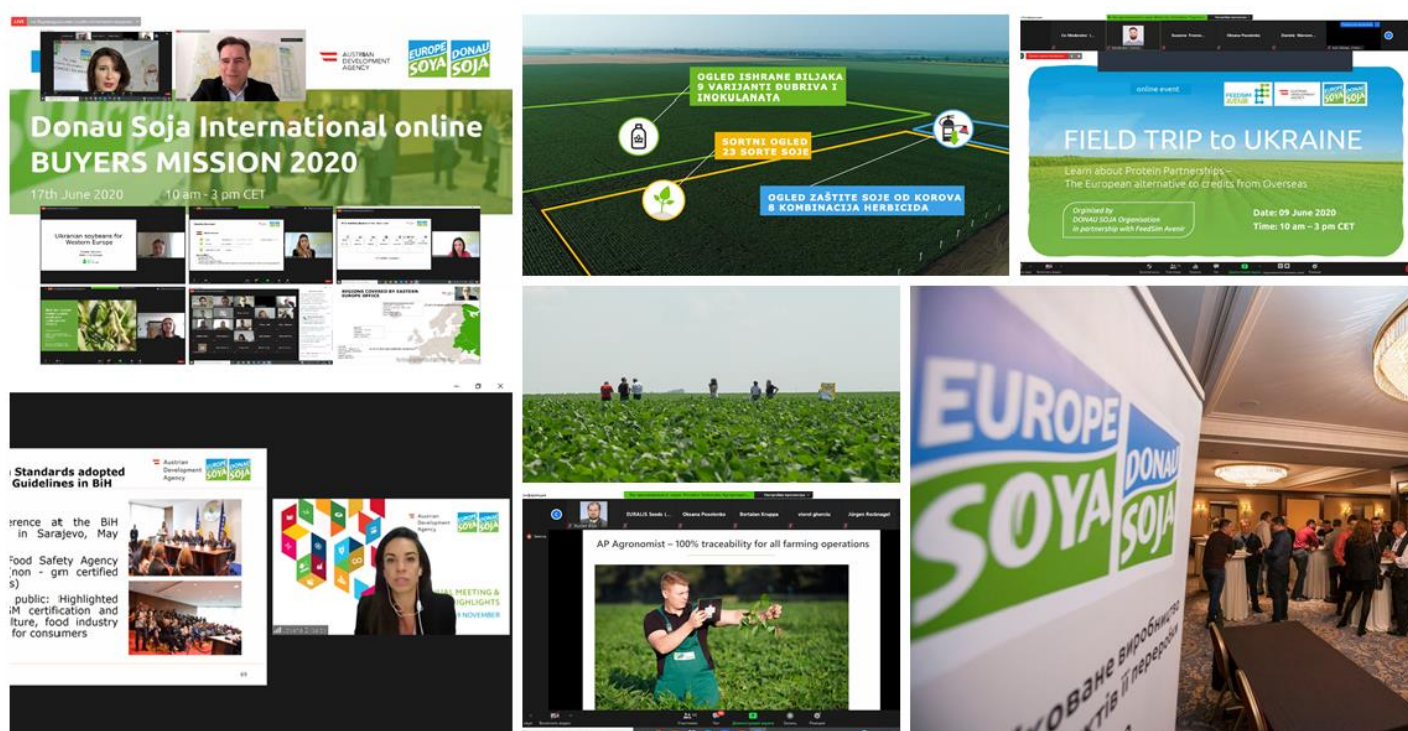
Donau Soja was in 2020 active as a participant and speaker at major business and industry events. The main goals that Donau Soja advocates through public

communications include sustainable cultivation methods, efficient distribution and responsible consumption of protein.

43 DONAU SOJA EVENTS (ONLINE/OFFLINE)

ORGANISED BY DONAU SOJA OFFICES

ANNUAL MEETINGS | CONFERENCES | SEMINARS
| FIELD DAYS | PRESS CONFERENCES | BUYERS
MISSIONS | FIELD TRIPS



LEGUME HUB - EUROPE'S KNOWLEDGE PLATFORM FOR LEGUMES

The Legume Hub (legumehub.eu) was developed within the Legumes Translated project by Donau Soja during 2020 and was launched in summer 2021. The Legume Hub aims to empower all interested in the development of legume cropping and use with access to knowledge, insight and successful practices across value chains - from plant breeding, on-farm activities, to processing and consumption.

Donau Soja provides the secretariat for the Legume Hub and provides the contact point for the emerging Legume Hub Association. Its overall goal is the improvement of the agronomic, economic and environmental performance of legume-supported cropping systems in Europe.

The Legume Hub is an

- open accessible
- self-publishing
- multi-lingual **knowledge platform**: English, German, Romanian and Russian.

Open and free to join

- Publish your articles, research reports or videos or
- disseminate existing ones.
- Each is citable as a scientific or technical publication.

The Legume Hub gives maximum recognition to

- its contributors,
- their projects and
- organisations.

AT A GLANCE



73 articles



71 contributors



24 videos



4 languages



Funded by the
European Union



Donau Soja is supported by the Austrian Development Agency (ADA) in framework of 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).



DONAU SOJA

Promoting a sustainable and European protein supply

www.donausoja.org
Wiesingerstrasse 6/14
1010 Vienna
+43 1 512 17 44 10

September 2021