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EUROPE SOYA DONAU SOJA

DONAU SOJA
PROTEIN STRATEGY FOR EUROPE

28 June 2018, Vienna

THE DONAU SOJA PROTEIN STRATEGY FOR EUROPE

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 soybeans 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. wCarbohydrate-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.

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.

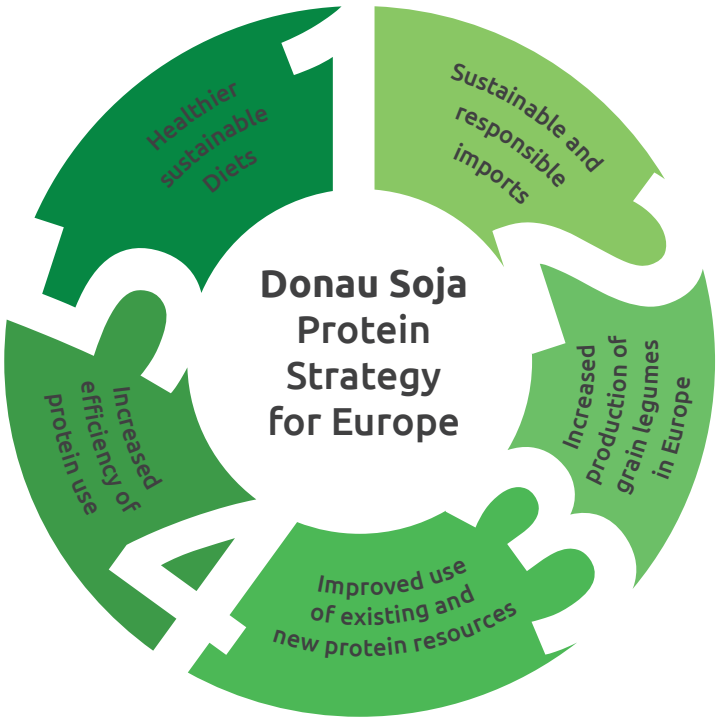
2. Increased production of grain legumes in Europe:
Increasing grain legume production in Europe will bring a wide range of benefits and reduce the protein deficit. Especially in Europe, grain legumes increase diversity in cropping and support pollinating insects. They don't need nitrogen fertiliser 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.

[1]Proteins are nitrogen-based compounds and consequently protein production and use affects the nitrogen cycle. Due to this link, current farming and food systems are largely responsible for the human impact on the nitrogen cycle and the most exceeded planetary boundary. Protein production and consumption is a major driver of greenhouse gas emissions from agriculture and land use change, nitrate pollution of water and ammonia pollution of air, and loss of natural habitats and biodiversity.

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.



Delivering change – The Protein Transition Action Plan:
The Protein Transition depends on combined efforts in the public and private sectors, all based on the use of sound science, technology and innovation. Some measures can be implemented now in conjunction with on-going commercial activities and current policy instruments. Others require longer term changes.

For the short term (1-5 years):
There are still reports of poor standards of production in soy exporting regions. There is increasing concern that our imported protein sources are not sustainable with reports of unsustainable agronomic practices, exploitation of the rural poor, and continued habitat loss in the producing regions of South America. A first step in a response is an immediate tightening of standards within European value chains with a commitment to high social and environmental standards, and zero conversion of natural and semi-natural lands to agriculture and cropping respectively. This can be delivered by joint commitment across all trading organisations operating in Europe. The retail sector can contribute significantly to an impulse for change. For soy, we need to switch to 100% certification and we also need joint working across the trading sector to validate that the certification of that soy is really supporting high production standards. This could be achieved by a programme of evidence gathering to assess and validate the impact of certification. The overall goal is to raise production standards. This will increase the demand for other protein sources in Europe stimulating the development of alternative value chains. Labelling which helps consumers differentiate between products for a range of production characteristics (including GM-free labelling) can increase market opportunities for legumes grown in Europe the standards that prevail in the EU.

The scale of the challenge is fundamentally determined by consumption. Public agencies already have health guidelines that indicate that a large proportion of the population consume more meat and dairy products than is recommended for good health. The resulting 'healthy moderation' message could be more clearly communicated and debated in public. Healthy eating guidelines have not been prominently linked to sustainable development ("Sustainable healthy eating"). We need unambiguous policy acknowledgement and public information about healthy and sustainable dietary choices. This will provide more favourable conditions for change in the food industry and sustain the current trend towards reduced livestock product consumption opening up options to reduce European livestock production, plant protein imports, and nitrogen pollution.

Short-term measures can also include increasing and improving the regulation of nutrient use in farming. The current development of farm-level nutrient balances in Germany is an example of how policy in related areas has the potential to support the protein transition by incentivising more precise protein feeding. Parallel to this, it is essential that the recent growth in grain legume cultivation

in Europe is sustained by the Common Agricultural Policy and by continued technical support for farmers.

For the medium term (1-10 years):
Parallel to, and building on, the short term measures, we need investment in technical innovation on farms and in other parts of the value chains. Technical development programmes such as those organised by Donau Soja in south-eastern Europe need to continue, integrated into the development of value chains. This requires 'bottom-up' innovation tailored to local circumstances within a wider framework of change. We need more research and especially more systematic translation of relevant agricultural and food research into practice at all levels: European, national and local.

The development of global standards for responsible trade and imports through collaboration with China is also a reasonable medium term objective that can be initiated now through the Donau Soja Europe-China Protein Council that was launched in Beijing in 2017.

Also in the medium term, the reform of the Common Agricultural Policy can be steered to support the Protein Transition. Further and more demanding measures to increase the diversity of cropping and to improve on-farm biodiversity can directly and indirectly support the production of grain legumes. All CAP reform measures can be proofed for their effect on the protein balance, both at member state and European level with national targets set. Increased support for relevant research, innovation and technical change focused on legume crops is required.

For the long term (1-20 years):
Improvements in plant breeding are particularly relevant in the long-term. It usually takes more than 10 years from initial parent selection to the delivery of a new field-tested crop variety. The foundation of this is the availability of a more diverse range of well-characterised and tested parent breeding lines for breeding programmes. Traditionally, because the conventional genetic improvement of in-bred crop species such as wheat, barley and grain legumes such as soybean is not well rewarded by Plant Breeders Rights, there is under-investment by the private sector. This challenge is increased for those in-bred species that are not widely grown and which are being developed from a low area base. This means that public support is required if society is to gain from the potential of plant breeding, especially for legumes. In the case of grain legumes in particular, there is potential to improve crops in the medium and long term by incorporating new breeding material from other regions, for example from China.

The development of completely new value chain infrastructures is also a long-term undertaking which starts at the level of individual farm businesses and extends to the retailers. These are various, but of particular note is the development of new east-west trading within Europe.

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.

About the development of this strategy

The overall goal of Donau Soja is a 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 Soya 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.

THE FIFTH DONAU SOJA CONGRESS JUNE 20, 2018, SCHWÄBISCH HALL, GERMANY

THE PROTEIN TRANSITION RAPPORTEUR'S REPORT

This document summarises the discussions at the Fifth Donau Soja Congress in Schwäbisch Hall in Germany, 20 June 2018. The theme was The Protein Transition and the Donau Soja Protein Strategy for Europe. The Congress set out to provide input into the development of European policy, especially the European Protein Plan.

BACKGROUND

The Donau Soja Protein Strategy for Europe (hereinafter referred to as the Strategy) was drafted in early 2018 and endorsed by the Donau Soja Board and Presidium in March. This was followed by consultation with all Donau Soja members. The Strategy was endorsed by the Donau Soja General Assembly on 19 April 2018.

The Strategy builds on Donau Soja's engagement with the policy community since 2014 when the Donau Soja Declaration was produced. This was followed by Donau Soja's support of the Europe Soja Declaration (jointly developed with Germany and Hungary) which was signed by 14 EU governments in 2017, followed by four European governments from outside the EU in early 2018. The Fifth Donau Soja Congress built on this past policy engagement. It brought together Donau Soja members, scientists, non-government organisations, and policy makers to discuss the Protein Transition. Reflecting the Strategy's international and science-based character, the congress was preceded by the 2nd Europe-China Soya Symposium on 19 June. Several speakers reflected on Donau Soja's small beginnings in 2012 and how Donau Soja has developed into a truly European organisation that now fosters global partnership.

The speakers and other discussion panel members who provided the foundation of the discussions reported here are listed at end of this report. The conclusions set out here arise from common themes in the contributions of speakers and from the five pillars of the Donau Soja Strategy. These discussions are reported in detail. The speakers and many audience participants deliver content-rich material upon which this report is based.

THE TOP FIVE CONCLUSIONS

1. The Protein Challenge in its widest sense is a policy challenge that results from a profound global market and political failure. Public policy needs to be more active in intervening to address the resultant public bads, especially the negative impacts in soy exporting regions and the impacts on the global nitrogen cycle. The EU must seriously pursue all options to halt deforestation and take the lead in placing mandatory duty of care on EU importers of agricultural commodities to ensure soya imports do not stem from illegal deforestation or habitat conversion and have not violated land tenure or other human rights. With the exception of coupled payments for protein crops in some countries, public interventions in the EU to date are generally indirect, for example focused on investment in knowledge transfer to farmers. A large part of the problem is linked to the consumption of livestock-derived products in excess of public health guidelines. The public sector could provide a more supportive environment to those promoting more sustainable and healthy consumption.

2. The private sector has led in tackling the fundamental drivers. The Protein Challenge has reached the mainstream businesses and value chains. There is growing awareness of the need to reduce reliance on unsustainably produced soya, and new value chains are developing. The demand for GM-free value chains, especially in Germany, is having a profound impact on food production across Europe supporting the Protein Transition. The public and private sector measures are now complementing each other and delivering progress in the Protein Transition. More concerted or joint action on the part of the private sector is required to increase the transparency of the sourcing and the use of high protein plant produce and the related markets. Harmonisation of environmental and social standards is required and cooperation could increase the effectiveness of certification in exporting countries, reduce transaction costs, and improve the chain of custody.

3. Adverse impacts of developing new sources of protein on the competiveness of farming need to be avoided. This requires better understanding of the economic impact of grain legumes in cropping systems, improved crop and livestock production practices, and the conversion of higher process quality into higher prices for farmers.

4. The Protein Transition provides very significant and diverse opportunities for innovation. This is innovation in all parts of the value chain from policy development, plant breeding, more efficient feeding, through to the development of new food products.

5. Europe and the world need the Protein Transition. The Donau Soja Protein Strategy for Europe is the right approach. It will be successful if it gets appropriate political support and value chain actors stay the course. Engagement with the current Common Agricultural Policy reform process demonstrating the relevance of an ambitious Protein Plan that is broad in scope to the nine objectives is essential. The proposed nine objectives of the CAP provide the framework for engagement and a Protein Plan should seek to underpin all nine objectives. Developing more sustainable protein sourcing and use is fundamental to climate protection. The debate about measures needs to take place tailored at member state level and must move on from the instruments currently in focus under 'Greening'. The global approach of the Donau Strategy is especially relevant to the Sustainable Development Goals of the United Nations. These connections need to be strengthened in the minds of policy makers.

THEMES

The discussions revealed a number of reoccurring themes. These are:

The strong political consensus supporting an ambitious and pro-active Protein Plan

Strong political agreement that the Protein Challenge needs to be addressed urgently was evident throughout the meeting. This consensus covered the full scope and all five pillars of the Strategy. A wide range of policy areas are involved: agriculture, public health and environment. Therefore, the need for more ambitious integrated public policy interventions to protect protein-related public goods and prevent 'public bads' was emphasised. The 'public bad' of the adverse impacts of the global trade in soya in exporting countries was a focus of discussion. There was a clear consensus from across the representatives of the policy community of the need for an ambitious Protein Plan from the European Commission. 2018 is the decisive year in terms of how Europe addresses the Protein Challenge: 2018 is the Protein Strategy Year. The goal of a 50% reduction in reliance on imported soya by 2025 was very strongly endorsed at the congress.

The roles of the public and private sectors

It was noted that the more radical interventions (compared with public policy) are coming from the private sector in collaboration with civil society. Corporate social responsibility measures in the private sector are now playing a major role in driving change. There was consensus that the interventions by the private sector are now combining with the more indirect interventions by the public sector to deliver real change: "Things are coming together". There are many indications for this: European dependence on imported soya is decreasing; the demand for some meats, especially pigmeat, is declining; and the production of grain legumes, especially soybean, is increasing. The public rejection of foods that use genetically modified crop in their value chains is a major catalyst that is now having far-reaching effects. The transition to sustainable protein sourcing and use was

described as an emancipation of Europe: Europe and the world need this change.

Despite this progress, there were consistent reminders from participants of the need for more far-reaching public policy interventions. The impacts on the nitrogen cycle, the dependence on imported protein that is unsustainably produced, and the effects of the over-consumption of livestock products by a large proportion of the population are all public challenges. It was strongly stated that they reflect market, political and policy failure that justify more direct public interventions. In addition, testimony of the very slow reform of the Common Agricultural Policy away from supporting incumbent agricultural interests to wider public needs was convincingly provided. Public policy has not progressed in step with the expectations of citizens and the needs of the environment: policy frequently follows rather than leads. In particular, more could be done to acknowledge the health and wider public benefits of reducing excessive consumption of livestock products. The role of public policy in controlling public bads needs greater recognition with, for example, assessment of European imports on habitats and human rights in other regions. Policy to control unsustainable and damaging soy production must however be developed mindful of World Trade Organisation rules.

In understanding the respective public and private sector roles, the meeting was reminded of the need to differentiate between the consumer and the citizen. The reluctance of consumers to pay for higher process quality and public goods in their purchasing should not be seen as reluctance to pay for higher standards or a lack of interest in change. It is a consequence of the lack of power of the individual consumer when making individual purchases and the profound market failure that needs more public intervention.

The need for market transparency and harmonisation of standards

Measures to improve markets were emphasised by several speakers. Markets and flows of protein-rich materials are still not transparent. “Badness hides in anonymity”. Retailers could work more closely together pre-competitively to develop common standards and common chains of custody. Such collaboration would reduce transaction costs and help overcome lock-ins. Sustainable protein would become mainstream. Public procurement could play a role in helping the development of higher process standards. Standards must extend well beyond mere exclusion of genetically modified (GM) produce. The recent success in harmonising non-GM standards was offered as an example.

The demand for GM-free value chains

The growing demand in Europe for GM-free food value chains, for example livestock products such as milk from animals fed exclusively on non-GM materials, is having profound impacts on food production, manufacturing and distribution. This is combining with other concerns about unsustainable sourcing of protein to create increasing market interest in local livestock value chains and feed based

exclusively on raw materials grown in Europe. Decision makers in public policy and in industry are now only beginning to grasp the full consequences of this combination of market drivers. The result is a set of market conditions that are combining to shift Europe's agri-food systems towards the Protein Transition.

Innovation potential
There were many references to the potential for innovation to support the Protein Transition. These range from innovation in sustainable sourcing, plant breeding, through to the development of new product value chains supporting healthier diets. The contributions of twenty visitors from China confirmed the common interests between China and Europe and that Donau Soja has successful established a reliable collaboration and platform for innovation.

The development of east-to-west trade in Europe was acknowledged as a contributor to regional development and European cohesion. Speakers from eastern Europe emphasised classical interventions such as technical support for innovation in cropping, public investment in infrastructure, and targeted investment in building value chains. The opportunities offered by demand in the EU for non-GM raw material produced in Europe are being grasped by decision makers.

Competitiveness
Europe's dependence on imported soya is largely a consequence of the exploitation of comparative advantage, with global trade enabling specialisation in cereal production in Europe. Even though the competiveness of these specialised farming systems is being eroded by exceeded natural boundaries (e.g. increased weed problems, pesticide restrictions, and nitrogen emissions), it remains important that the Protein Transition does not compromise farm-level competitiveness. For this we need continued investment in the development of protein crops and support for innovation and best practices. In this context, de-commodification must be progressed to create value for consumers and to bring benefits for farmers.

Engaging with the current reform of the CAP
The latest reform proposals published by the European Commission set out the delegation of much of the responsibility for policy measures to the member states under a framework of 9 policy objectives. Assuming this proposal is developed, the Protein Transition must be advanced within this framework. Under these proposals, instruments such as 'crop diversification' and 'ecological focus areas' become largely irrelevant at European level. The nine proposed objectives are:

1. support viable farm income and resilience across the EU territory to enhance food security;
2. enhance market orientation and increase competitiveness including greater focus on research, technology and digitalisation;

3. improve farmers' position in the value chain;
4. contribute to climate change mitigation and adaptation, as well as sustainable energy;
5. foster sustainable development and efficient management of natural resources such as water, soil and air;
6. contribute to the protection of biodiversity, enhance ecosystem services and preserve habitats and landscapes;
7. attract young farmers and facilitate business development in rural areas;
8. promote employment, growth, social inclusion and local development in rural areas, including bio-economy and sustainable forestry;
9. improve the response of EU agriculture to societal demands on food and health, including safe, nutritious and sustainable food, as well as animal welfare.

To advance the Protein Transition, the key value chain actors must work in concert taking these objectives on board. It is essential to engage with member states to have measures that support the Protein Transition developed and implemented. This will require a change in the emphasis away from Brussels to member state capitals with discussions focused on locally-tailored national interventions. In addition, the Protein Transition is highly relevant to the United Nations Sustainable Development Goals (SDG).

The effectiveness of policy measures designed and implemented at member state level will be monitored by the European Commission using indicators that use easily accessible information. It was suggested that national protein balances could be used for indicators due to its reflection of broad agricultural system change and links to the nitrogen cycle. This is particularly relevant because the European Commission's first step in its current work on protein was to establish a protein balance for the EU. However, the broad nature of protein balances in relation to CAP objectives was cited as a disadvantage. In addition, the rigorous application of protein balancing might be regarded as a challenge to WTO rules. However, from a scientific viewpoint, protein balances and related parameters do offer the opportunity to monitor progress in the sustainable development of our agri-food systems.

The Protein Transition: the five pillars for change

The Donau Soja Protein Strategy for Europe was very strongly endorsed by speakers. It should be used for maximum impact. It was described as important for Europe and the world. The goal of a 50% reduction in reliance on imported soya by 2025 was seen as entirely realistic and appropriate. Points made in relation to the individual pillars include:

1. Sustainable and responsible imports

This goal and its prominence in the Strategy was strongly endorsed. Direct EU-le-

vel public policy intervention is constrained by the World Trade Organisation rules. However, decisive action can be taken by the private sector. The meeting's spotlight on the social and environmental impacts on Brazil and the related political and economic drivers was welcomed. Independent assessment of these impacts in the form of an independent 'Soy Observatory in South America) is needed. Wider use of stricter standards must be verified collectively. The EU can take the lead in placing mandatory duty of care on EU importers of agricultural commodities to ensure soya imports do not stem from illegal deforestation or habitat conversion and have not violated land tenure or other human rights. The congress heard calls from senior policy-makers for the banning of soya grown illegally, for example on illegally cleared land or by businesses where human rights are not respected. The European Commission was also called to act on its feasibility study on options to halt deforestation and forest degradation. Combined with action in China discussed at the preceding Europe-China Symposium, a positive self-reinforcing global trend led by the private sector could be established.

2. Increased production of grain legumes in Europe

Production of grain legumes has increased in many EU member states in recent years, supported by current policy. Contrary to expectations, the production (especially of soybean) has increased or remained stable in the last year despite the ban on the use of plant protection products in EFA. This resilience reflects the demand for GM-free alternatives to imported soya and the increasing effect of natural constraints such as weeds and pests cereal and oilseed rape crops.

3. Improved use of existing and new protein resources

Occasional reference was made to existing and new protein sources. It is self-evident that such sources should developed. This includes grassland and the congress heard evidence of opportunities if livestock production systems are adapted to better use these resources. It should not be overlooked that while the EU imports about 70% of the high-protein crop materials used in the EU, the EU is also about 70% self-sufficient in tradable plant protein. Oilseed rape is the most important EU source of protein meals, and like all EU sourced materials, is non-GM.

4. Increased efficiency of protein use

The congress heard evidence of very significant increases in the efficiency of protein use as a consequence of targeted support of innovation, for example in Bavaria. As with Pillar 2, support for innovation is a key measure. Experience shows that the agricultural sector is responsive to support for innovation in this area.

5. Healthier and more sustainable diets

The congress strongly endorsed the focus on dietary change and demand side measures. Consumption, a large proportion of which is in excess of healthy eating guidelines, sets the size of the Protein Challenge. The excess protein is used as a mere source of energy by many consumers and is thus wasteful.

The restoration of consumers' protein balance, moving from two-thirds coming from animal products to two thirds coming from plant products, is required, with an overall reduction in protein consumption for those consuming in excess of requirements. A polarised debate about meat-eating versus veganism/vegetarianism must be avoided. Instead, the debate needs to be framed in terms of supporting moderation and the health of all consumers. While delivering product innovation is clearly the responsibility of the private sector, the public sector could do more to raise awareness.

Rapporteur: Dr Donal Murphy-Bokern

22 June 2018, updated 27 June 2018

LIST OF CONGRESS SPEAKERS, PANEL MEMBERS AND POLITICAL GUESTS

van der Poel	René	ADM
Faber	Florian	ARGE Gentechnik-frei
Hissting	Alexander	Association Food without Genetic Engineering (VLOG)
Moldenhauer	Heike	Association Food without Genetic Engineering (VLOG)
Motuzko	Dimitry	ATK LLC
Schall	Gunter	Austrian Development Agency
Fischer	Elisabeth	Austrian Soybean Association
Bühler	Rudolf	Bäuerliche Erzeugergemeinschaft Schwäbisch Hall (BESH)
Schmid	Konrad	Bavarian State Ministry of Food, Agriculture and Forestry
Eder	Joachim	Bavarian State Research Center (Lfl)
Krumphuber	Christian	Chamber of Agriculture Upper Austria
Meyer	Michaela	Edeka Südwest
Gaugitsch	Helmut	Environment Agency Austria
Stangl	Monika	Federal Ministry for Sustainability and Tourism
Andrioli	Antônio	Federal University of Fronteira Sul, Brazil
Brosz	Emese	Fenaco
Polsterer	Nicole	FERN
Willemsen	Jeroen	Green Protein Alliance
Polgár	Zoltán	Hungarian Soy Association
Benz	Siegmar	Kraichgau Raiffeisen Zentrum
Seiwerth	Anna	Hungarian Soy Association
Potor	Alexandru	Ministry of Agriculture and Rural Development Romania
Feldman	Zsolt	Ministry of Agriculture Hungary
Puchan	Grit	Ministry of Rural Affairs and Consumer Protection Baden-Württemberg (MLR)
Gurr-Hirsch	Friedlinde	Ministry of Rural Affairs and Consumer Protection Baden-Württemberg (MLR)
Fischler	Franz	President Forum Alpbach
Howell	Belinda	Round Table on Responsible Soy (RTRS)
Anwander	Sybil	Swiss Federal Office for the Environment (FOEN)
Arens	Stephan	Union for the Promotion of Oil and Protein Plants (UFOP)
Wilhelm	Birgit	WWF Germany
Krön	Matthias	Donau Soja
Sandbichler	Markus	Donau Soja
Kalentic	Marija	Donau Soja

THE DONAU SOJA ASSOCIATION

The Donau Soja Association was founded in 2012 by Matthias Krön and is an international, non-profit organisation based in Vienna. Our goal is to promote the development of a sustainable and European protein supply.

The organisation supports soya bean cultivation in Europe, supported by the Donau Soja and Europe Soja brands. Through these brands, the sustainable production of non-GM soya is supported providing regional supplies of plant protein. ´The Donau Soja and the Europe Soya Standard and their Guidelines (Donau Soja; Europe Soya) are foundations of the business. It is possible to be certified in the organic sector following our two standards.

Our soya growers comply with EU plant protection regulations, EU labour and social standards (ILO), and additional requirements. Direct impact on land-use change (e.g. deforestation) is using only land that was arable land before 1 January 2008.

Prominent European institutes and organisations support this ambitious initiative. Our 280 members include food retailers, large agricultural traders, the animal feed industry, oil mills and numerous processors, as well as environmental organisations such as Greenpeace, Global 2000 and WWF . This broad membership base is essential the Donau Soja mission. The initiative also has broad support from the policy community: eighteen European governments have supported the Donau Soja Declaration and 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 protein.

Europe's current agricultural systems depend on soya. Consumption in the Europe rose from the equivalent of 2.7 million tonnes in 1960 to 43.5 million tonnes in 2016. It is now at about 37 million tonnes. More than 90% of this soya is imported from South America. But soya grows well in Europe and Europe Soya and Donau Soja give soya a new, European face: the face of European farmers. Europe Soya and Donau Soja guarantee 100% transparency and link consumers to European soya bean farmers and producers. Donau Soja is about supporting investment in the cultivation of quality soya production to strengthen Europe. The infrastructure expansion required for creating added value also provides interesting economic possibilities for the region.

Together with its partners, the Donau Soja Association implements breeding and research projects.

Co-ordinated out of Austria, Donau Soja interlinks the Danube region with new economic perspectives, offering economic opportunities and stimulus for all European countries and help member businesses in a changing market, especially the growing demand for more sustainable and European protein supplies. Consumers profit from safe, sustainable, non-GM and regional soya.

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