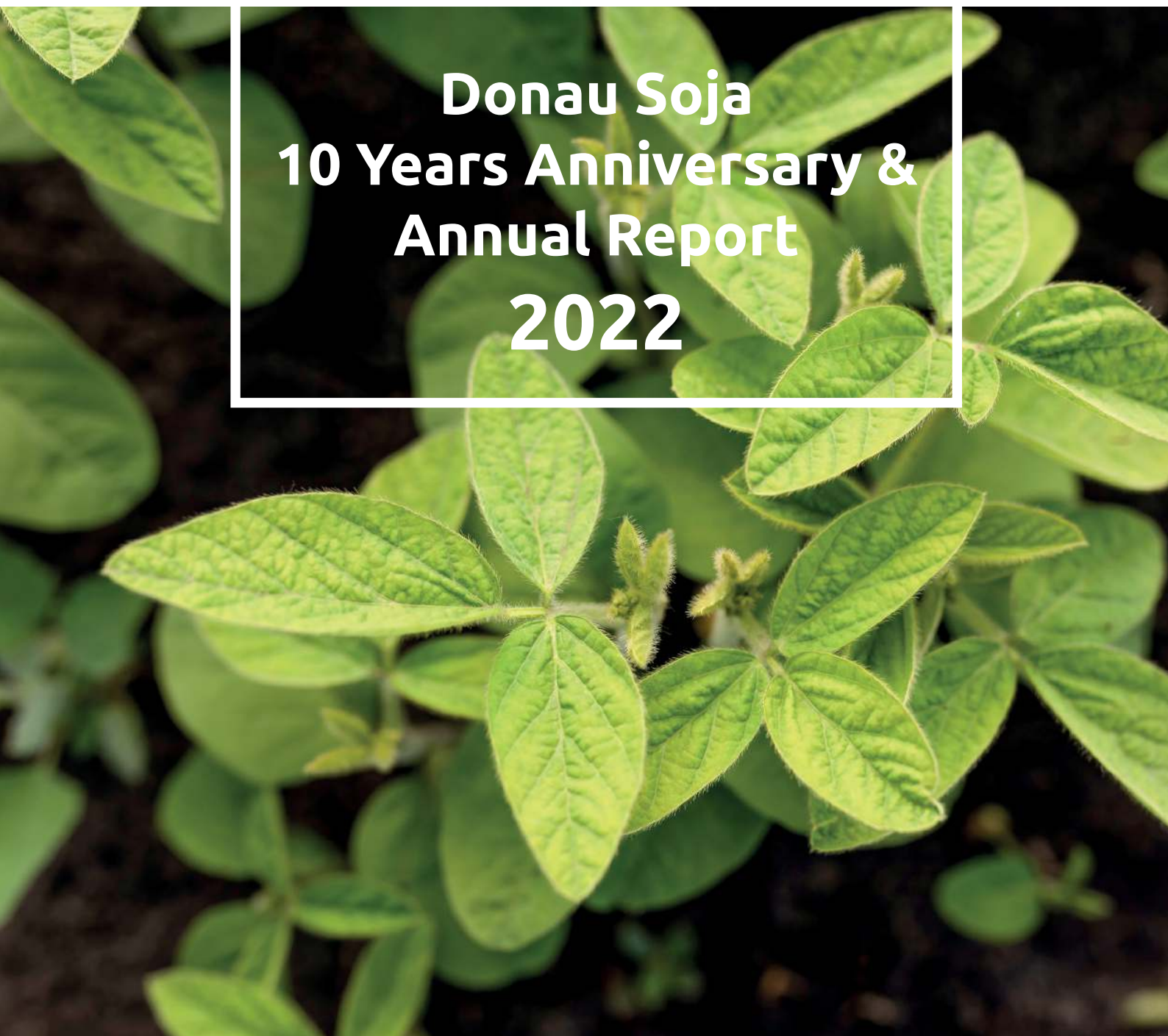




10 DONAU
SOJA
Years

**Donau Soja
10 Years Anniversary &
Annual Report
2022**



IMPRINT



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DONAU SOJA

Promoting a sustainable and European protein supply

Donau Soja Association: ZVR 974917455, VAT: ATU67736989
Donau Soja GmbH: FN 411586 z, VAT: ATU68511906
www.donausoja.org
Wiesingerstrasse 6/14
1010 Vienna
+43 1 512 17 44 10

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Proofreading: Joanna Scudamore-Trezek, Franko Petri, Axel Grunt
Graphic & Design: Monika Eisenkölbl
Authors and co-authors: Matthias Krön, Leopold Rittler, Susanne Fromwald, Franko Petri, Volodymyr Pugachov, Donal Murphy-Bokern, Johann Schlederer, Johann Blaimauer, Dagmar Gollan, Julia Weihs, Klaus Palmetzhofer, Marija Kalentic, Emilija Stefanović, Oksana Prosolenko, Iryna Korchahina, Jovana Djislov, Elisabeth Berger, Ela Malai, Milica Bajic, Marijana Vuletic, Veronika Platzer, Anastasiia Radiuk

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FOREWORD OF THE PRESIDENT

When we held our first Donau Soja Conference at the historic Agricultural Exchange in Vienna in 2012, Minister Brunner from Bavaria stated that the Donau Soja Project would be a marathon. And after ten successful years, I think we all agree with him. Much has been achieved in this time, and much more needs to be done to reach our organisation's goal of the European Protein Transition. This term, which we coined ten years ago, is now commonly used all over Europe and has become a call for change.

Donau Soja is a unique organisation because its members and partners are drawn from a long value chain, extending from soya seeds to supermarkets, through to universities and civil society. Over the past 50 years, we have seen the growth of unfair, exploitative, and environmentally damaging protein production and consumption, influenced by political and economic forces. The result is a fragile and environmentally insecure protein footprint, both in Europe and worldwide.

We have set out to create a resilient, safe, and environmentally sound European protein landscape, one which supports small farmers, consumers, and businesses all over Europe, creates jobs and integrates eastern and western European agricultural and food value chains.

Today, we can point to many proud achievements: European soya production has more than doubled over the past decade, European seed companies have created hundreds of successful new varieties of soya plants, and the regionalisation of soya production and use has progressed.

We have shaped the European debate and influenced EU and government decisions to create protein plans and policies. The war in Ukraine has not stopped us. Instead, it has brought us closer together, in support of our friends in Ukraine.



So far we have only completed the first 10 kilometres of our marathon, and we must redouble our efforts. The world is now in a multiple-crises mode. We need to use existing agricultural land to build new supply chains that can guarantee food security and strengthen European resilience. We need to embrace the reduced demand for meat and respond to the call for more vegetarian and vegan food we see in Europe. Currently, 80 percent of farmland – arable and grassland combined – is used for animal production. Reducing meat production will free up more space to de-intensify agriculture and encourage sustainable farming.

Now we are developing new certification schemes to cover all field crops, not just soybeans. This opens new opportunities for farmers all over Europe. I want to invite current and future members and partners to continue to march forward with us. For those who are not yet members, please join us and help achieve the Protein Transition in Europe.

Matthias Krön

President and Chairman of Donau Soja



FOREWORD OF THE BOARD

10 YEARS OF DONAU SOJA - A TRUE REASON TO CELEBRATE

It fills me with joy as well as pride to have been involved in such a successful project as Donau Soja right from the start. As leading representatives of the Austrian pork industry, we are constantly confronted with the question of pig feed, in particular protein supply for our livestock. There has always been criticism of imports of genetically modified soybean meal from North and South America. Thus, long before the Donau Soja project came into existence, I was already looking for solutions to reduce dependence on this controversial animal feedstuff.

Therefore I was delighted when, at a „Soja Österreich“ (Soya Austria) conference at which I gave a speech on the use of soy in pig farming, I met Matthias Krön, a visionary who had been unknown to me until then. I regarded his request that I play an official role in implementing his soya vision as an honour and a mission. Even at that time, I felt it was not enough to rely solely on GMO-free soya from overseas, and that there was a need to promote soya cultivation in Europe. And so it gives me great satisfaction when I see magnificent soya fields as I drive through the Austrian countryside today, and realise that soya is now Austria's 4th most cultivated crop. Thus a large part of our vision has already come true after ten years. I would like to thank everyone involved in this achievement, and especially Matthias Krön, the tireless driving force behind Donau Soja. Thank you, congratulations, and I wish you all the very best for the next ten years!

Johannn Schlederer

Deputy Chairman Board Donau Soja Association
Austrian Pork Farmers Union

DONAU SOJA IS A EUROPEAN MOVEMENT FOR A BETTER WORLD

The Donau Soja Association was originally started with the aim of increasing the self-sufficiency of GMO-free soybeans through increased cultivation and use as domestic protein animal feed or as an alternative plant food. The dimension and scope of this idea has rapidly evolved, becoming what is today a European movement, indeed a philosophy of the more conscious use of our world's essential resources. Here the ecological issues of climate relevance, the establishment of short cycles, and the use of the soy plant's natural atmospheric nitrogen-binding capacity play just as much a role as the socio-economic factors of increased added value and are embedded in a new and sustainable definition of biodiversity. The path of integrating all protein crops as well as important food raw materials to create sustainable food supply and use across all stages of the value chain, right down to the individual consumer, has long since been established. With an additional focus on short, national cycles, the final outcome is a better world with empowered citizens and a future for our planet and our descendants.

Johann Blaimauer

Deputy Chairman Board Donau Soja Association
RWA Raiffeisen Ware Austria



THE BEST WAY TO UNDERSTAND THE WORLD IS TO CHANGE IT

In 2012, Matthias Krön founded Donau Soja together with a committed group of like-minded people drawn from agriculture, food trade and science. Their goal: the European protein transition. In this interview Krön looks back, recalls the founding and development of Donau Soja, and takes a look into the organisation's future.

Interview: Axel Grunt with Matthias Krön

Donau Soja is celebrating its 10th anniversary. The issues relevant in its founding days are still relevant. Matthias Krön, how did the organisation come into being?

When we set out to found Donau Soja, I was an entrepreneur. Together with my team, I had converted a small dairy to plant-based milk and built a sizeable company on this transition. I felt that the change to more sustainable food and especially soya needed to happen on a scale much bigger than any company could achieve. Together with many like-minded partners, we founded the first „Soya from Austria“ („Soja aus Österreich“) association back in 2005. Back then there was both an enormous opportunity to develop serious soya production in Austria and strong resistance in the Austrian farming and policy community to plant-based food. I felt that both the opportunity and the threat needed to be addressed and that we had to do something completely new.

Soon it became clear to me that we could not solve the soya and protein challenges by only focusing on Austria. We needed at least a Central European project to work together in partnership. Developing safe and sustainable non-GM supply chains, promoting best practices and upscaling soya production needed an international response. Loss of biodiversity, land use change, glyphosate, problems with the mismanagement of agricultural systems. Many of the issues we are working on today at Donau Soja were already around in the '90s and early '00s, and it was clear to me that what we should do was part of a global movement for sustainable agro-food systems.

You saw many problems, but also many opportunities?

Companies are good at making money, but they have a hard time influencing long supply chains. That is why we wanted to create a business association of progressive companies and involving civil society, with the goal of influencing the entire soya chain and changing the system. I saw that there are many problems, but also many oppor-

tunities for change. Maybe my strength is to see things that are not yet there, but could be, and then convince people to join in. And there were many people with similar feelings willing to make their own contributions to the emerging concept of a European Soya Association.

„THE BEST WAY TO UNDERSTAND THE WORLD IS TO CHANGE IT.“

The core group came from the „Soya from Austria“ association. They include Leopold Pischinger, one of the first soya farmers in Austria. There was Karl Fischer from Saatbau Linz, and Gerhard Perger, one of the best organic soya farmers in the world who showed me that you can also create high yields without using toxins. Also Josef Bamberger, one of the largest soya processors in Austria, and Christof Strobl from Upper Austria. We knew that you can build up companies based on soya, that they could flourish. We knew that change could be successful, doable, and practical.



Politicians and the chambers of agriculture were also very much present and included Maximilian Hiegelsberger from Upper Austria and his predecessor, State Counsellor Josef Plank and Stephan Pernkopf from Lower Austria. Also the Austrian Minister of Agriculture, Nikolaus Berlakovich, and Helmut Brunner, the Minister of Agriculture from Bavaria. Rudolf Bühler, a massive force in Germany, soon joined us, and so the project became more and more international.

Ursula Bittner and Elisabeth Berger were involved from the beginning and Susanne Fromwald joined us early on. We started talking to food retailers and other stakeholders, in other words, building up a network.



The „founding fathers“ of Donau Soja, the first association board, were at that time Ernst Gauhs from RWA, Johann Schlederer from VÖS, Florian Faber for ARGE Gentechnikfrei, Franz Hölzl for SPAR. Then there was Josef Niederschick from REWE, Rupert Bauinger/Fixkraft, Michael Gohn, Fritz Mauthner GmbH, Michael Wurzer from ZAG and, of course, Ernst Ternon from Sojarei.



Are necessary changes an economic opportunity?

Change offers the ideal conditions for success. Most successful companies start out as changemakers and contribute to and facilitate change. The necessary change in the field of protein supply presented and continues to present an economic opportunity. Consequently, Donau Soja aims to go a part of the way together with companies and promote economic change as an opportunity for business.

Donau Soja is not a traditional business or trade association that primarily defends the status quo, nor are we a typical NGO that highlights problems in promoting change. We are also definitely not a consulting company; instead we have elements of all three. I believe that by establishing a members' association with a strong focus on change, we have mobilised the forces needed to effect this change.

How is Donau Soja financed? Who is behind the organisation?

It has always been my goal for Donau Soja to be financially independent, because that means being able to act as we think necessary, and not be beholden to special interests. Donau Soja is not an apron organisation; we are truly independent and that is also a core strength.

We realised early on that you cannot build a big organisation based solely on membership fees. We wanted to take advantage of the economic demand for sustainable soya to increase our independence, and now the royalties from our standards and programmes ensure this economic independence. When we were growing and needed

support, Stephan Dorfmeister volunteered to help us with timely and precious financial and strategic advice, something I am very grateful for.

In a way, the Donau Soja research questions were: Can we help shape change, and can we shape change to benefit as many stakeholders as possible? Ultimately, we want European soya to have a high sustainability standard. We do not only want processors but also as many farmers as possible to benefit. And above all, as many small farmers as possible. We want to reduce poverty, create opportunities for farming families, and training opportunities for girls. That's why we want as many people as possible, and especially the weaker ones, to benefit.

What do the Donau Soja Standards mean?

We have seen that people primarily associate the word „soya“ with severe environmental destruction. Moreover, many people are unfamiliar with soya, which is why we established the origin from the Danube region as the first criterion. And we also wanted to be able to guarantee this, which is why the standard includes a guarantee of origin – soya from Europe.

The second part is genetic engineering, which people in Europe largely reject and which for the most part is not allowed in farm production in Europe. We have said that we want to make GMO-free products available for consumers, and we want to support farmers who produce GMO-free in marketing this production method.

The third part is sustainability in the broadest sense. No deforestation, no destruction of wetlands. European soya must not bring severe land use changes. European soya is not responsible for excessive glyphosate use. We want producers to proudly write on their products that this is a better kind of soya while being committed to a global pathway of sustainability and solidarity. We are in no way saying that only soya from Europe is good soya or that all soya produced outside of Europe is worse. But when we reduce soya imports we promote a regional approach towards food chains while also relieving pressure on sensitive ecosystems abroad. Europe is the world's second largest importer of soya, so increasing European soya production offers global support for the wider transition towards a better global agri-food system.

Most European soya is produced in Central and Eastern Europe, areas which lag in productivity. That means increasing soya production there does not increase import demand for other commodities: Europe can produce much more soya, much more wheat and much more of other agricultural products.

One of the first steps in the life of Donau Soja was immediately a big one - the conversion of Austrian egg production to Donau Soja in 2013. How did it come about?

We started a stakeholder process at that time, with feed mills, retailers, chambers of agriculture, to develop this new standard. Of course, we were expecting widespread acceptance. One retail chain quickly said they wanted to only sell eggs from chickens fed with Donau Soja, and within a short time all retail chains, with just a few exceptions, have changed their entire Austrian egg production. And this was a very successful project. Austrian eggs have one of the best CO₂ value in Europe and the producers get good prices. But the process was difficult. The egg producers had to change to Donau Soja feed in only a short period of time. It was not a very democratic process, and many farmers, many producers, felt they had been bulldozed.

Today, no one would say that it wasn't a good move for Austrian farmers. We have less salmonella, we are more self-sufficient, we have more than 60 percent soya from Austria in egg feed, we have many processing plants, we have the regionalisation of production. So it's an incredible success story. Over the last nine years, Austrian egg producers have been able to reduce CO₂ emissions by one million tonnes, which represents the total annual emissions of a big provincial Austrian city such as Klagenfurt with more than 100,000 inhabitants.



Where does Europe stand now? Where is European soya grown?

The first thing we did back then was to define the Donau Soja Region. I sat with Erhard Busek, the Austrian and European politician, and asked him how to define the Danube region. In principle, this is the Danube River catchment area, but it was clear that we had to extend this a little. No soya grows in Albania, but it does in northern

Italy where a lot of water flows from there into the Danube. So then we added the Po Valley. Busek said, „Central Europe has movable fences“.

Then there was the question of involving neighbouring countries. Serbia is a big soybean growing country. Through GIZ, the German Society for International Cooperation, we participated in an agricultural exhibition in Novi Sad and got in touch with Marija Kalentić and Emilija Stefanović, who still play important roles at Donau Soja. And from this cooperation a project with GIZ was born - an office in Novi Sad, as well as our entire work in Bosnia & Herzegovina, Croatia, and Serbia.

Subsequently, we started a strategic partnership with the Austrian Development Agency (ADA) which allowed us to open an office in Ukraine and in Moldova. Thus Donau Soja has become a pan-European organisation. You can feel how Europe could be. And ADA and GIZ have made it possible for us to become more involved in south-eastern Europe.



PROTEIN PARTNERSHIPS - THE EUROPEAN ALTERNATIVE TO CREDITS FROM OVERSEAS

This has resulted in a special project, the Protein Partnerships. Companies using non-sustainable soya help farmers in south-eastern Europe, mostly outside the EU, to produce sustainable soya, thereby offsetting their own negative footprint. We offer the European alternative to so-called „credits“ by matching companies directly with farmers, as partners. That means we have soya in Europe that is produced differently and better. The main problem, after all, is land use change. If I cultivate on fields that have been cleared solely for soya cultivation, I have to include the negative effects of clearance or the destruction of wetlands in the CO₂ balance. We don't have to do that in Europe: Donau Soja grows only on fields that have been used for agriculture since at least January



2008. If I feed a fattened pig with Donau Soja, I have 40 percent less CO₂ pollution. That's incredible but true.

Of course, Donau Soja is about much more than just CO₂ reduction. Donau Soja also brings an improvement in crop rotations in Europe. We currently have only 1-2 percent legumes in Europe. We hardly grow any beans, peas, or lentils anymore. So inserting soya in rotation brings tangible benefits such as more colourful fields and more diversity. This has positive effects that go far beyond CO₂ emissions.



Does knowledge of the soya market and modern agriculture also play a big role at Donau Soja?

We try to connect people who have knowledge with those who need knowledge. That's why we founded knowledge platforms such as the Legume Hub. As an organisation with many contacts and a broad market overview, we can see very quickly where knowledge or information is missing. In one region, the farmers know something, while in another region this experience is still missing.

We have also achieved a great deal in terms of market transparency. The non-GM market is not a commodity market, there is no commodity exchange for non-GM soya. Overall, the market is difficult to understand. That is why Donau Soja has developed the best global non-GM market newsletter, our Market Report, which is read worldwide. This helps create a common understanding and support for smaller players. A lack of transparency always strengthens the strong who benefit from their knowledge advantage. Transparency supports fairness and better margins for smaller players. The same applies to price quotations. You can check the prices of non-GM soya in different regions of Europe on our website every day, free of charge.

What is the future of Donau Soja?

Ultimately, everything we do has to do with food. European diets are very meat heavy. At the same time, more

and more people are starting to eat less animal-based food and to demand more vegetarian and vegan products. This change is a challenge. We want to link traditional agriculture and new meat-free, dairy-free, egg-free production. And we want to create new standards for the new burgers, nuggets, and spreads which consist of soya as well as other legumes and wheat gluten. This creates the demand for standards beyond soya.

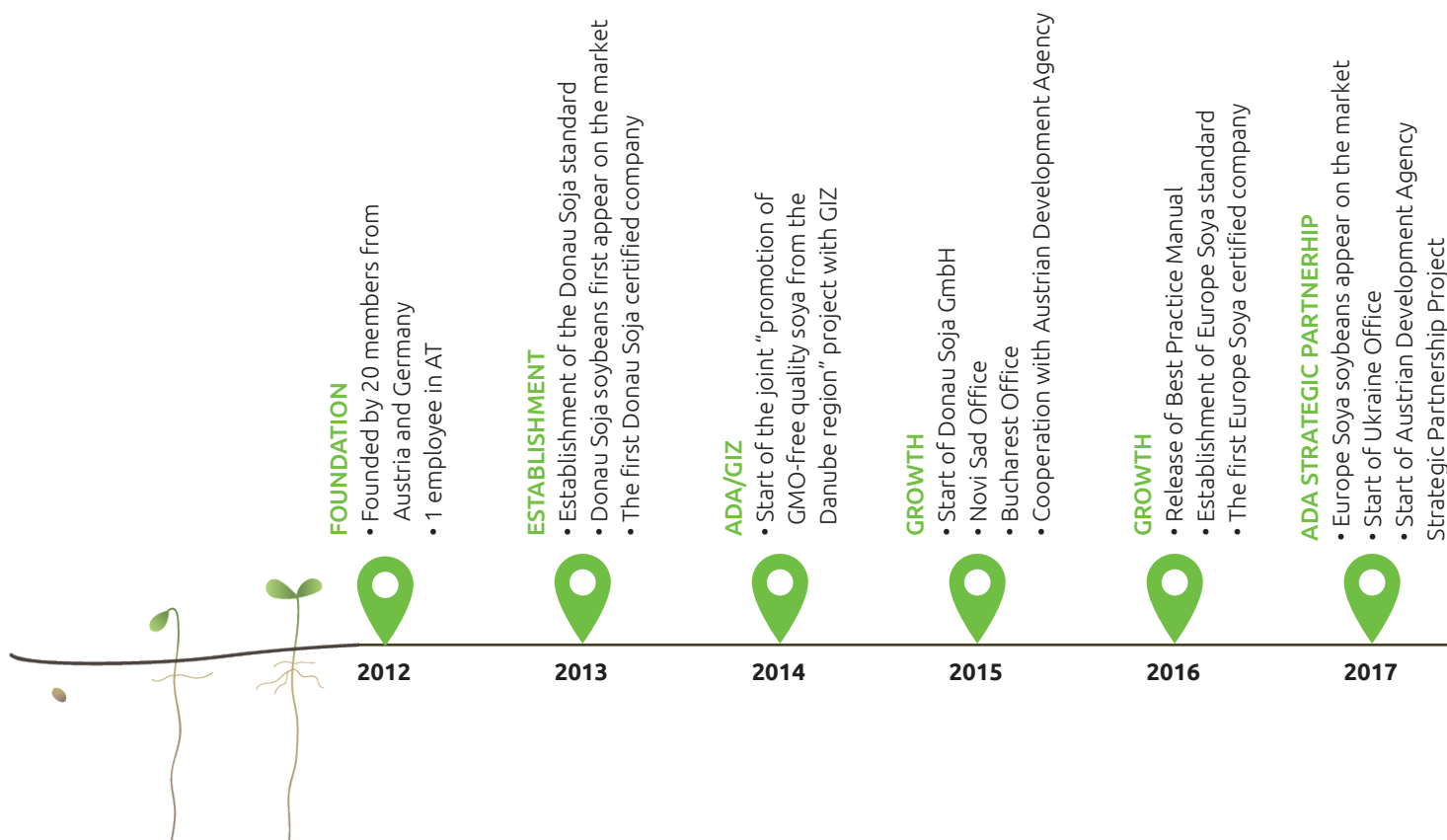
In response, Donau Soja has decided to develop a „multi-crop standard.“ From the farmers' point of view, it is clear that if I am going to be certified, if I am going to be inspected, why am I doing it only for my soybean field and not for my whole farm? There is a need to produce other products to the same high standard. That is why we are currently developing a new system. This will extend our core values such as sustainability, GMO-free origin from the Danube region and from Europe, to all the field crops farmers produce, and will encourage farmers to value their crops better.



The system that emerged after World War II is changing rapidly. We are faced with crises, whether Covid or the war in Ukraine, all of which also have an impact on food supplies. That makes it important to have more robustness in our system in Europe. We need to pay attention to supply chains, to our agriculture, especially in protein, where we are heavily dependent on imports. We want to bring people together between Eastern and Western Europe, we want climate protection, we want to promote social fairness and development, we want to support poverty alleviation and support smallholders, and we want to achieve greater independence so that we are less buffeted by various crises. These are important approaches that Europe urgently needs to take in the next ten years. That is why I believe that Donau Soja will become much more relevant in the next ten years, and that we need to devote a lot of energy to completing our marathon.

DONAU SOJA AT A GLANCE

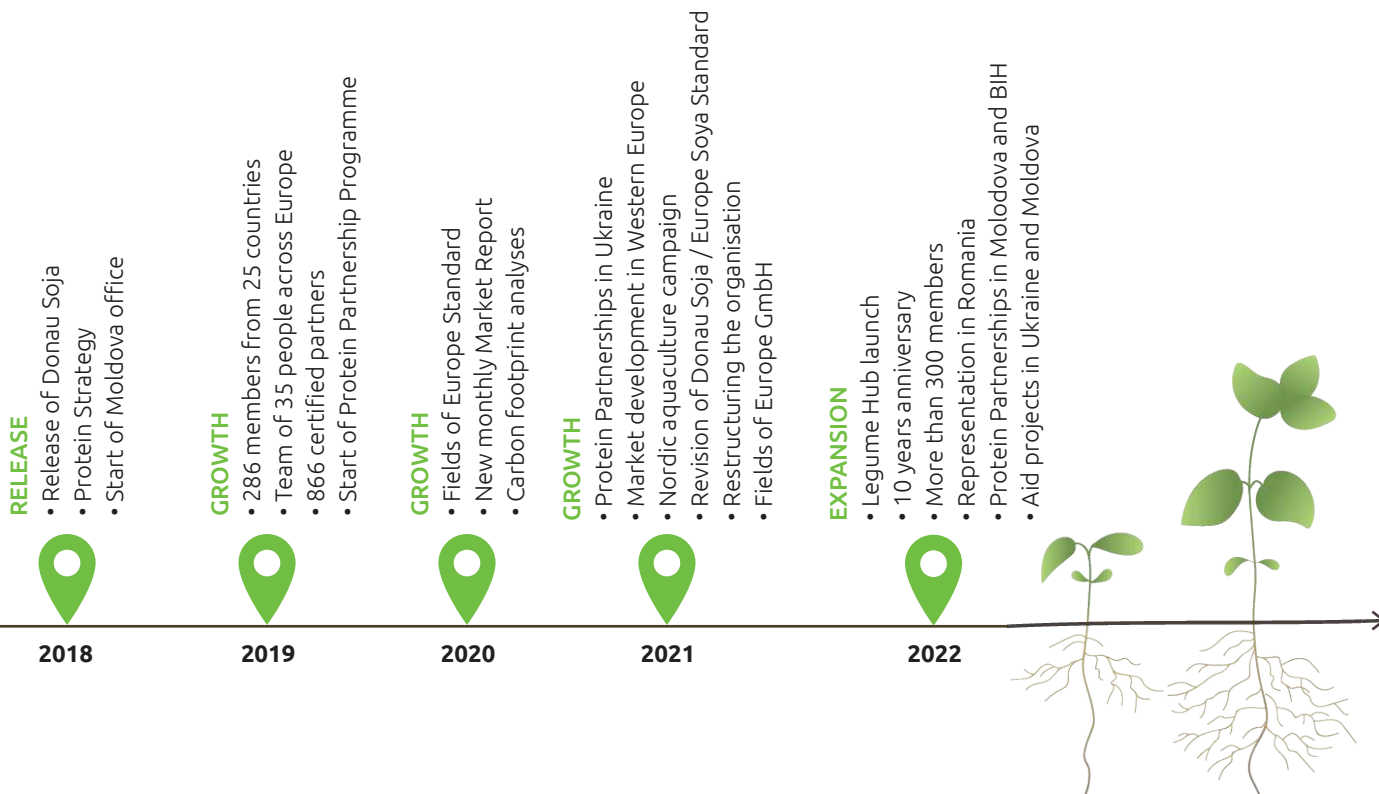
THE DONAU SOJA MILESTONES



IN A NUTSHELL

Organisation:	International Not-for-profit Multistakeholder Independent	Activities:	Market Development Agriculture Research & Innovation Policy formation Certification B2B meetings Market analyses Protein Partnerships - an alternative to credits from overseas
Vision:	Sustainable, safe & European protein supply		
Members:	306 members from 27 countries		
Goals:	Support a sustainable European soya production Establish local & safe supply chains	Offices:	Vienna (Austria) Novi Sad (Serbia) Kyiv (Ukraine) Chisinau (Moldova)





DONAU SOJA & EUROPE SOYA

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



715,000 t certified soybeans (2021)



>10,000 soybean producers



almost 900 certified partners



34 primary processors
(oil mills 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 tonnes
adds up to

1,000,000 t*



*achieved in 2022

DONAU SOJA TEAM



Matthias Krön



Elena Covelli



Karin Geppl



Emilija Stefanovic



Biljana Tadic



Bertalan Kruppa



Oksana Prosolenko



Milica Bajic



Marcella Gross-Varga



Sarah Sierra



Sonja Varga



Dagmar Gollan



Branko Jevremov



Monika Eisenkölbl



Anastasia Radiuk



Monika Hubik



Daniela Arnberger



Susanne Fromwald



Maria Ekl-Jürgens



Franko Petri



Klaus Palmetzhofer



Elisabeth Berger



Ela Malai



Alina Petrea



Georg Spreitzer



Julia Weihs



Axel Grunt



Bojan Tomek



Marija Kalentic



Jovana Dijsalov



Jasmin Karer



Leopold Rittler



Christoph Wiemer



Veronika Platzer



Ana Pinzaru



Marijana Vuletic



Jennifer Demblin



Mariia Smolska



Birgit Denifl



Mirjana Lalosevic



Iryna Korchahina



Volodymyr Pugachov

THE DONAU SOJA EUROPEAN PROTEIN STRATEGY

Donal Murphy-Bokern

“HOW WE EAT DETERMINES, TO A CONSIDERABLE EXTENT, HOW THE WORLD IS USED.” - Wendell Berry, American poet and farmer

Since Wendell Berry wrote these words more than thirty years ago, science has shown that how we obtain and use protein has a huge impact on our planet. It is second only to energy use in its effect on climate change. We now understand the link between protein consumption and the nitrogen cycle, with its detrimental repercussions on our environment. We also understand that European consumers generally eat more protein than they need, in quantities which exceed health guidelines, and that a large proportion of that protein comes from animal sources. This realisation is no longer limited to scientific circles and has become anchored in the public consciousness. We are now all challenged to make better protein choices and to care more for our planet.

Donau Soja recognised at an early stage that we need to help European businesses and consumers to address the wider challenges of our food system if the soybean as a legume is to make a meaningful contribution to sustainable development. The legumes, with their butterfly-like flowers, are a very special and diverse group of protein-rich plants that fix their own nitrogen. They help us eat better for the benefit of our health and of the planet. But although they thrive here, legume crops such as soybean, pea and lupin are relatively rarely grown in Europe. European farmers have specialised in cereals and use imported soya to complement these carbohydrate-rich crops. These soya imports are linked to deforestation in South America. Our European food production system, driven by eleven million tonnes of nitrogen fertiliser and about 35 million tonnes of imported soya annually, has allowed the mass, concentrated production of meat, milk and eggs. This has damaged the nitrogen cycle, with emissions of ammonia and nitrous oxide into the air, and nitrate into water. This must change. Soya grown in Europe helps us break the link between European protein consumption and deforestation; it supports more diverse cropping; it is not dependent on nitrogen fertiliser and uses few pesticides; and it supports sustainable, healthy diets. Seen in this light, Donau Soja is an important voice in addressing the “protein challenge” and facilitating the necessary protein transition. To this end, Donau Soja developed its own European Protein Strategy in 2018. The Protein Strategy recognises the need for a holistic

approach, with a system change based on five pillars. The protein challenge is global, and it is vital that Europe leads this change globally through its influence as an importer. The first pillar is sustainable and responsible imports. We need to use standards that effectively support responsible production in the exporting countries, particularly in South America. This will send a signal to the world.

The biggest change is needed in Europe, namely the increased production of grain legumes to increase protein production and secure the wider agronomic and environmental benefits that legumes bring to our farms. European farmers who grow more legumes can diversify crops and reduce weed, pest and disease problems in cereals. Legume crops meet the growing demand for plant protein produced in Europe under stringent environmental and social standards in regional and local value chains. In central and eastern Europe, in particular, there is potential to improve cropping systems using grain soybean.

We also need to improve the use of new and existing protein resources. 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 the better use of agri-food residues in livestock feeding. Our grassland-based production systems could also make better use of grass and high-protein grassland species such as clover (a legume) to reduce soybean use. Other protein sources include forage crops such as alfalfa. There are also potential opportunities in algae culture.

Increased efficiency and the more precise use of protein reduces pollution by reducing the excretion of damaging 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 so that greater precision in feeding also reduces production costs.

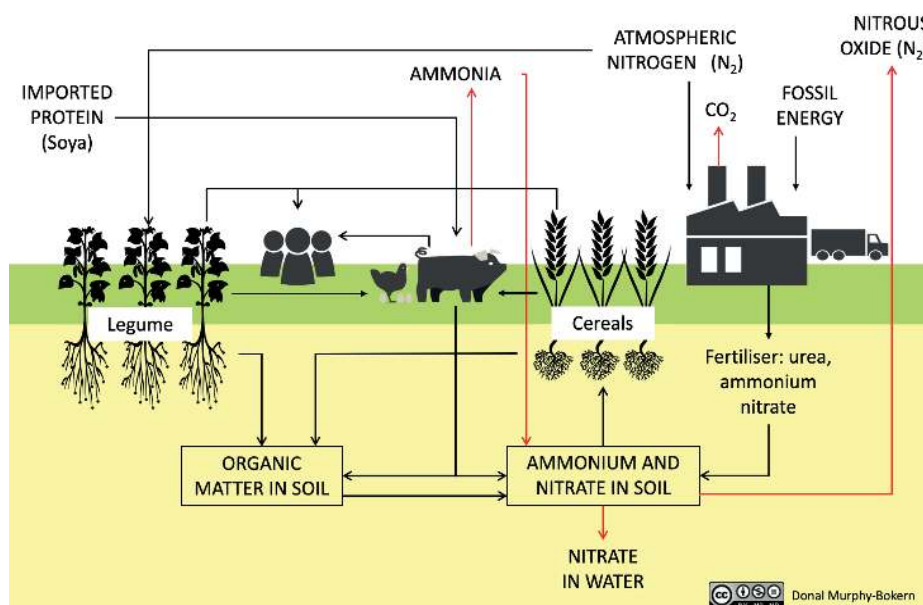
Our protein challenge is due primarily to the large quantities of meat, fish, milk and eggs we consume, usually in excess of public health guidelines. Tasty and at the same time healthier and more sustainable diets that rely more on plant protein, especially legumes such as soybean, will create opportunities because a smaller livestock sector will be required. This, in turn, reduces the protein demands of the entire food system, because most plant protein-nitrogen consumed by livestock is excreted, causing a large proportion of the water and air pollution



from agriculture, particularly in regions where livestock production is concentrated. Moderation in the consumption of animal products with a corresponding reduction in their production would improve the performance of our agri-food system for our health, the environment and land use.

Since its publication in mid-2018, the Donau Soja European Protein Strategy has contributed to the public debate about protein. The European Commission's report in late 2018 "on the development of plant proteins in the European Union" set out five existing options for strengthening the development of EU-grown plant protein. These options involved measures to reduce soya imports.

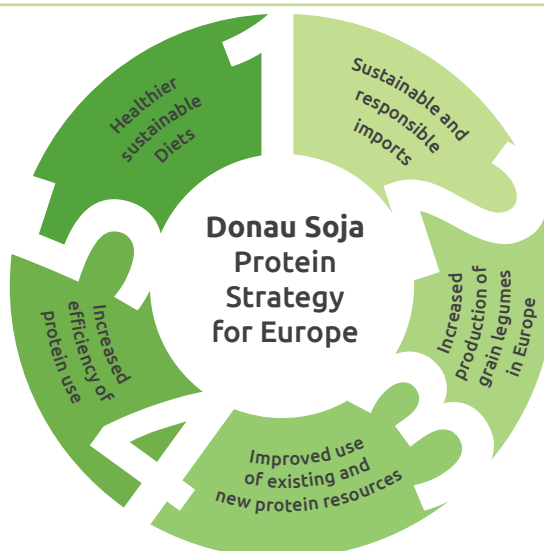
However, its ambition was dwarfed by that of the Green Deal published less than a year later. Since then, we have seen successive waves of change that impact our food system. This started with increased public awareness of the unprecedented levels of forest destruction in soybean exporting countries in 2019, particularly in Brazil. The COVID-19 pandemic has revealed how globalisation has left Europe vulnerable to disruptions in the supply of key materials and products. And in recent months, the war in Ukraine has reminded us how dependent our food system is on nitrogen fertilisers made from natural gas. We must drive the agenda forward to achieve a new balance between food production, nature, and the resource cycles that maintain our ecosystems.



The nitrogen cycle is one of the most overstressed natural cycles. This schematic illustration provides a simplified model of the primary impacts of the European food system on the nitrogen cycle. It focuses on the effects of different crop types (legumes and other crops, shown as cereals) and protein consumption on the nitrogen cycle. The red arrows illustrate polluting emissions to the environment. The black arrows illustrate major resources and non-polluting nitrogen flows. The current system in Europe, with its low use of legumes, results in large emissions of polluting nitrogen compounds released to air and water. This system is driven by imported protein and nitrogen fertilizers. The scale of these resource flows and the resulting pollution emissions is largely directly or indirectly determined by the quantity of protein in food and especially the proportion of that protein from animal sources.

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:



THE PLANT-BASED FOOD REVOLUTION

Matthias Krön

Donau Soja is committed to its primary goal – the European Protein Transition. In our 2017 “Protein Strategy for Europe” we set out five major pillars of this transition. The last pillar, “Healthier and more sustainable diets”, is perhaps the most critical. What we eat determines the magnitude of Europe’s protein gap and defines the appearance of our landscapes.

At the same time, what we eat, and what we should or should not eat are very emotional topics. Food is so tightly bound up with culture and tradition, and to our subjective wellbeing, that discussions can easily turn into arguments.



In this article I would like to offer seven theses:

1) Whether we eat meat or not, on average we consume roughly 30% more protein than our bodies need. Reducing protein consumption would contribute to solving the problem of protein availability. Eating more vegetables and reducing the size of your daily protein portion, whether steak, fish or tofu, would make a significant contribution to food security. And no one would lose muscle mass by reducing their protein intake to recommended levels.

2) The type of protein we eat matters. Livestock farming occupies roughly 80% of the world’s agricultural land and consumes a very high proportion of field crops. As an Austrian from Salzburg, I know that many livestock consume grass that humans cannot consume. I understand the role of grazing in maintaining the beautiful landscapes we love. But it is also a fact that the vast majority of livestock farming in Europe consumes feed crops that humans could eat directly. This is a waste of calories: animals need calories to stay alive and grow, but can only pass on a small portion of these calories in the form of

their meat. Plant-based proteins, consumed directly by humans, offer a much more sustainable method of meeting human calorie needs.

3) The transition towards more plant-based food is in full swing. The main reasons for this dramatic and historical change are, I believe, ethical. Can we justify the harm we do to sentient beings by raising and slaughtering them for food? This question is foremost in people’s minds, and over the last ten years there has been a shift in attitudes amongst urban, affluent, and educated consumers. While until recently you had to excuse yourself for being a vegetarian or vegan, now the situation has almost reversed, becoming an apologetic “I’m sorry, I still eat meat.” Many consumers are also motivated by personal health considerations, and increasingly by an awareness that diets lower in animal products are far more environmentally friendly than diets based on meat, milk, and eggs.

For me, the ethical argument is the most powerful. As someone who eats meat and has been closely monitoring the livestock farming sector in Europe for nearly 30 years, I am convinced that over the next decades levels of meat consumption will fall significantly, with many rejecting animal products entirely. Animal welfare is not an end in itself, but a process. When you observe animals kept in the best of conditions, as I have, you start wondering whether you really want to kill and eat this happy pig after just 9 months when it could easily live for ten years? Once you start to think of animals and their lives you may have already begun a journey towards veganism. Again, I am not an activist, but an observer of these developments.



4) I believe that, rather than guilt, discovering the pleasures of eating plant-based food will be the key to eating fewer animal-based products. All over Europe, many varieties of vegetable have largely been forgotten. There is a wealth of culinary pleasure to be had from legumes such as beans, peas, and lentils. Just think of green edamame, for example. Traditional protein products, such as seitan (from wheat gluten), tofu, natto and tempeh, are also hugely underappreciated. In fact, people in Asia usually eat them because they are delicious, not because they are healthy. Here in Europe, we have a lot of catching up to do.

5) Billions of euros/dollars are currently being invested in alternatives and analogues of meat, dairy and eggs. Most of this money is being spent on either “lab meat” or on copying animal products in terms of mouthfeel, taste, and look. Many of the products coming out of laboratories are awful because plants are being forcibly transformed into something that looks like meat but contains too many questionable ingredients and is far too processed. However, these efforts will pay off. For the first time in history, investment is being made into plant protein foods. Plus, useful technology will emerge as a spin-off from many of the failed attempts at innovation. We see a plethora of ideas, start-ups and too many crazy food scientists with little understanding of food. But I am very optimistic that we will see great products emerge – as they are already starting to do.



6) European consumers want European, regional, and local food. There is no reason why educated consumers in our cities who eat local, organic eggs or meat should not switch to products grown by farmers geographically close to them. The alternative protein industry should listen. At Donau Soja, we can help connect you with farmers all over Europe and help build the value chains for truly European protein products.

7) European farmers and the traditional agricultural value chain needs to pay close attention because the plant-based food revolution is here to stay. Farmers will need to adapt their working methods and think deeply about what they can produce and offer. This should not be seen as a threat, but as an opportunity. European farmers have always adapted to markets, and in the past farms used to produce far fewer livestock. We will adapt, but only if we open our eyes and are prepared to look ahead.

We want to make Donau Soja an organisation that brings together farmers, producers and consumers all over Europe to build sustainable value chains for new crops, whether soya, peas, beans, or others. We want to help people understand that a more colourful and diverse range of food on our plates means more colourful and diverse fields, and that this is both a necessary and positive development.

The space we will gain from reducing livestock volumes can be used to grow crops which will feed more people, encourage more biodiversity, make farming less intensive, and boost organic agriculture. Change is a challenge, but together we have learnt that we can turn it into an opportunity. I invite you all to join us on this journey.



10 years ago, when I was Division Manager at RWA, I accompanied Donau Soja during its first steps. Its strategy is more relevant now than ever: livestock farming with regional soya for high-quality food providing added value for consumers and farmers. All the best for the future!



Ernst Gauhs
Auditor Verein Donau Soja
and Advisor, Produktenbörse
Wien

Congratulations on your impressive development and thank you for our always fruitful cooperation. It is good to have Donau Soja as a competent and reliable partner at our side. Non-GMO and European origin are a perfect match for the environment and a convincing marketing tool.



Alexander Hissting
Managing Director, Verband
Lebensmittel ohne Gentechnik
(VLOG) e.V. Saat-zucht

AMA Marketing congratulates Donau Soja on its 10th anniversary. Donau Soja makes a significant contribution to a regional European protein supply. The partnerships along the value chain and European resilience in feed supply must both be developed further.



Dipl.-Ing. Martin Greßl
Head of Quality Management
of Agrarmarkt Austria
Marketing

Soy brings people together, within Europe, along the value chain, whether rich or poor, both those alive today and the coming generations. The Austrian Development Cooperation is grateful for your 10 years of untiring efforts to effect change. It is an honour for us to support Donau Soja.



Gunter Schall
Head of the Private Sector
and Development Unit; Austrian
Development Agency

The Donau Soja initiative to promote European soy is unprecedented. Less dependence on raw materials from overseas and savings in transport costs are some of the key objectives of this initiative. Animal husbandry should benefit from your work.



Rupert Bauinger
CEO Fixkraft-Futtermittel
GmbH

Donau Soja successfully brings together and supports partners and members in answering today's social, ecological and economic challenges along the entire value chain. The Austrian-based association plays a key role in shaping the eco-social path we are following in Europe.



DI Georg Strasser
President of the Austrian
Farmers' Federation,
Member of the Austrian
Parliament

In the retrospective context of the last 10 years, Donau Soja's strategy is astonishingly modern. The circular economy, sustainability, and improving efficiency in our food and economic systems remain vital initiatives and will continue to drive Donau Soja. Good luck in all your endeavours.



DI Adolf Marksteiner
Austrian Chamber of Agriculture

On behalf of the Internationale Forschungsgemeinschaft Futtermitteltechnik e.V. (IFF) in Braunschweig, Germany, we congratulate the Donau Soja organisation on its 10th anniversary and look forward to confirming our closer cooperation in the future.



Rolf-Michael Blume
General Manager IFF

10 years of Donau Soja – a real blessing for the environment. European soybeans are an alternative to livestock feed produced using partially destructive cultivation methods. Our regional Hofglück brand relies on this raw material, also helping us to reduce our carbon emissions.



Michaela Meyer
EDEKA Südwest,
Donau Soja Board

Donau Soja shows what is possible with vision, hard work and persistence. Ten years ago, the „Eiweisswende“ (protein transition) started to gain momentum, enabling Switzerland to source feed soy primarily from Europe. We take our hats off to Donau Soja, and congratulate the organisation on its 10th anniversary.



Christian Oesch
President of the Soy Network Switzerland

Lower Austria occupies the top position in soybean production in Austria. Donau Soja is a major ambassador for domestic soy production and raises awareness of this important issue. I would like to thank Donau Soja for its unceasing commitment to this goal over the past 10 years.



Dr. Stefan Pernkopf
Vice Governor of Lower Austria

Quality, traceability, and sustainability are the three pillars of soybean produced in Europe under the Donau Soja system.



Giorgio dalla Bona
Cereal Docks

Donau Soja works to affect important transformations in Europe's agricultural sector: increased protein production, self-sufficiency and sustainability. Donau Soja's exceptionally strong political and business network creates both value and impact.



Ruud Tijssens
Director Public & Cooperative Affairs, Royal Agrifirm Group, Donau Soja Board

Donau Soja is an essential player when it comes to shaping the future of sustainable protein supply in Europe. This will become even more important in the light of the growing challenges of global food security. From my sustainability science standpoint, I would like to continue supporting these transformation processes.



Dr. Werner Zollitsch
Head of Centre for Global Change and Sustainability at BOKU

The pandemic and other current crises show how dependent we are on functioning supply chains. Together with Donau Soja, we are contributing to food security by building sustainable soy markets with resilient seeds. Thank you for the fruitful cooperation and congratulations on your 10th anniversary.



Friedrich Stift
Managing Director, Austrian Development Agency (ADA)

Donau Soja started with the goal of increasing self-sufficiency through GMO-free soybeans. The idea has evolved, becoming the philosophy of taking a conscientious approach to the world's essential resources, and today extends far beyond soybeans. Our congratulations!



DI Dr. Johann Blaimauer
RWA Raiffeisen Ware Austria, Donau Soja Board

HOW THE SOYBEAN BECAME A EUROPEAN CROP

Leopold Rittler

Today, soybeans are cultivated on tens of thousands of farms right across Europe. European farmers are skilled at growing soybeans, with Europe the home to some of the highest yields in the world. This is the result of European soybean varieties bred for the local conditions, a willingness to adopt the necessary farming practices, changing consumer preferences and market incentives, favourable political policies, and a warmer climate. How have we arrived at this point? The history of soybean cultivation in Europe may be relatively young, but it is still older than many realise.

The year 1873, almost 150 years ago, marked a milestone for soya in Europe. Friedrich Haberlandt, a professor of plant breeding at the agricultural research station which was the predecessor to Vienna's University of Natural Resources and Life Sciences (BOKU), came across exotic soybean seeds at the Chinese and Japanese booths at the World Expo in Vienna. Haberlandt immediately saw

the potential to incorporate the small bean from Asia into European crop rotation and diets. He procured seeds from Asia, grew soybean seed crops, and over the following years distributed them to 129 trial stations across regions in Switzerland, Austria, Germany, the Netherlands, Italy, Czech Republic, Slovakia, Croatia, Slovenia, Hungary, Serbia, Romania, Ukraine, and Russia. In 1878 Haberlandt published his trial results in his monograph "Die Sojabohne" (The Soybean) which is today regarded as the first scientific publication about the soybean. He can be considered the father of European soya cultivation, and also encouraged its global expansion.

In Europe, interest in the soybean grew in the following years. The first European cultivars were developed in 1921, more than a century ago. The Hungarian biochemist Laszlo Berczeller achieved technological breakthroughs to create pioneering innovations in the production of soybean flour for human consumption. This





innovation enabled a broader field of application, with soybean flour becoming an ingredient in many recipes and cookery books. Even then, soybean food products were advertised as affordable and protein rich.

During periods of European food shortages, in the 1920s, 1930s and 1940s, soybean cultivation gained attention as a low-cost source of protein. However, this changed radically in the mid-20th century: due to trade policies, soybean cultivation in Europe practically vanished, while the use of imported soymeal from the Americas as a low-cost protein source became the default option for livestock farmers.

In the aftermath of the global energy crisis in the 1970s, soybean cultivation experienced its first revival and upwards trend in Europe. According to FAO statistics, soybean production increased to more than 1.2 million hectares in 1989, on the combined area of its main producers Italy, Romania, Bulgaria, Yugoslavia, and France. Much of this production was linked to subsidies or other government policies in the socialist countries. Following a further policy change, the area under cultivation dropped once again, by around 50%.

In 2011, the year before founding Donau Soja Association, the area under soybean cultivation in Europe stood at 2,2 million hectares. This figure has now more than doubled over the past ten years, reaching 4,5 million hectares in

2022. This marks the second revival of the soybean in Europe. Today, the yield potential of soybean varieties, the cultivation techniques and farming skills, as well as the available processing facilities and markets are all more significantly advanced than in preceding decades. For that reason, in many regions today soybeans can compete with crops such as wheat or corn in the expanding market for regional, sustainable, and non-GM food and feed. Soybean cultivation is less dependent on subsidies and – in many regions of Europe - is fully integrated into various local and regional value chains for food and feed products. There are many challenges ahead of us, but by exchanging good practices and gaining mutual benefit by sharing experiences we can make the soybean a European farm and food staple and contribute to Europe's protein transition.

Donau Soja will continue to help farmers, processors and consumers increase European soybean production, processing and use. At the same time, we will start to develop a new focus on other European legumes with significant potential for expansion in the light of growing consumer interest in plant-based food: expect to hear more from us about faba beans, peas, chickpeas, lupins and lentils.

OUR QUALITY LABELS AND STANDARDS

DONAU SOJA / EUROPE SOYA



The Donau Soja and Europe Soya quality programmes were established in 2013 and 2015 respectively to promote and propagate the cultivation, processing and marketing of sustainable, non-GM, origin-controlled quality soya from the Danube region and all over Europe. The aim is to develop and guarantee a sustainable non-GM protein supply from Europe for Europe.

The Donau Soja and Europe Soya standard is based on ten principles of responsible soybean cultivation. These principles cover the two essential characteristics of “European origin” and “GM-free status”, alongside additional social, environmental, and economic aspects. Adherence to the Donau Soja and Europe Soya standards and guidelines are a prerequisite for using the Donau Soja and Europe Soya logo and quality label. They define the regions of origin of soybeans and include requirements for non-GM production, sustainability, traceability and the inspection system.



NON-GM DANUBE REGION STANDARD



The Non-GM Danube Region Standard is the first regionally harmonised non-GM quality standard in Southeast Europe. It was developed in 2015 with the support of the 15 Ministries of Agriculture within the Danube region, the Donau Soja Association, the Austrian Development Agency (ADA), the German Association for International Cooperation (GIZ), the German VLOG (Association of Food without Genetic Engineering) and the Austrian

Platform for GMO-Free Food Products (ARGE Gentechnik-frei), and the Environment Agency Austria (UBA).

The Non-GM Danube Region Standard with its regional “NON GMO Produced” label creates a joint and transparent market for non-GM products and facilitates regional trade without barriers. It also provides the industry with the opportunity to promote non-GM certified products on a regional basis, and adds value to and thus increases the competitiveness of the non-GM food sector in Southeast Europe while simultaneously helping consumers make an informed choice.



HIGH LEVEL OF ASSURANCE

Donau Soja implements a three-stage inspection system based on a risk-based inspection frequency.

Stage 1: Self-monitoring within the companies, and obligatory quality assurance schemes during the processing stages.

Stage 2: Independent third-party certification. Approved certification bodies regularly perform audits on site and issue valid Donau Soja certificates only to compliant companies.

Step 3: Donau Soja Integrity Programme. Additionally, and on a regular basis, the Donau Soja Organisation performs integrity audits, conducts laboratory analyses of Donau Soja products, and verifies the conversion and deforestation-free production of Donau Soja / Europe Soya soybeans.

Donau Soja audits and the issuing of certification are conducted by independent external certification bodies accredited in accordance with ISO/IEC 17065. To date, 18 certification bodies have been authorised by Donau Soja Organisation to conduct inspections and issue certification.



TRACEABILITY THROUGHOUT THE SUPPLY CHAIN

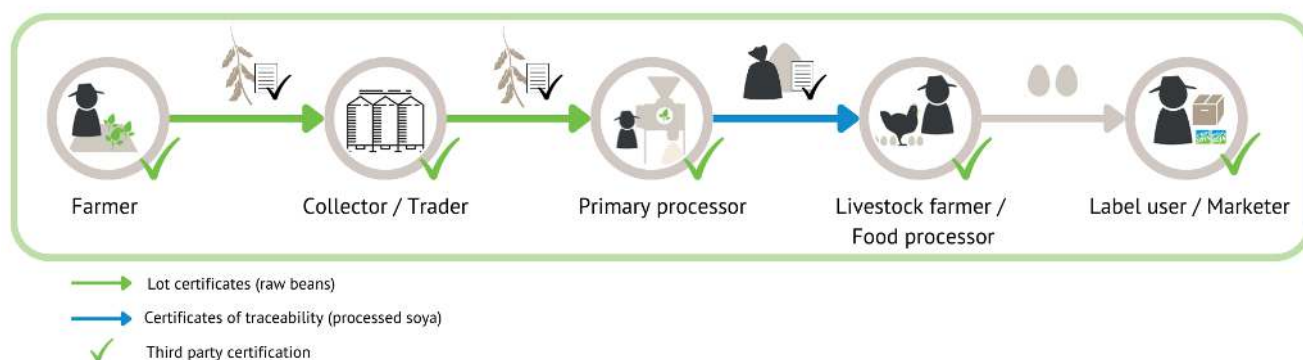
Donau Soja certification ensures that certified products are segregated from non-certified sources at each stage of the supply chain.

For soya products, such as soya in the form of food or drinks or processed soybeans as feed, this is achieved through separation and correct declaration, both throughout the respective company and at every step of the supply chain.

To ensure the traceability of raw soybeans, an IT-based lot certification system is used when trading and transporting Donau Soja beans from the primary agricultural collector to the primary processor.













A certificate of traceability may additionally be issued, covering the stage of the primary processor to the marketer.

The traceability system comprises all certified companies registered in the Donau Soja IT database, as well as those partners listed on our website as certified partners.



SUSTAINABILITY BENCHMARKING OF DONAU SOJA / EUROPE SOYA STANDARD

The Donau Soja and Europe Soya sustainable standards are recognised 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>Danish Alliance for Responsible Soy recognises Donau Soja / Europe Soya 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>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 recognises Donau Soja / Europe Soya certification as equivalent to VLOG standard certification.</p> <p>Germany</p>

* translated into English by Donau Soja

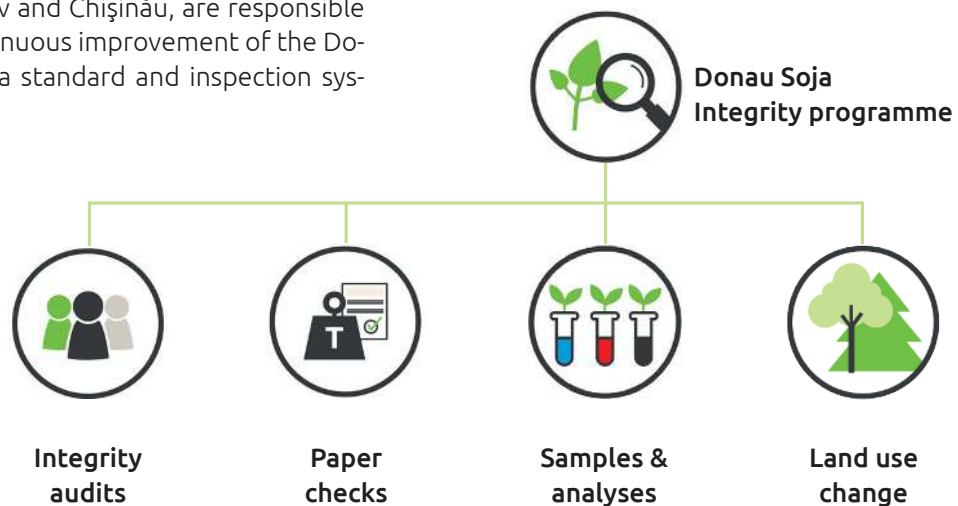
The Donau Soja and Europe Soya standards are recognised as sustainable soya sourcing standards by a wide range of stakeholders, including national soya initiatives, industry associations, scientific institutions and NGOs. The positive recognition and recommendations are the result

of the credible Donau Soja and Europe Soya standard system which provides strict criteria for standards combined with a high level of assurance and a reliable traceability system.



DONAU SOJA QUALITY ASSURANCE

The quality management teams in the offices in Vienna, as well as in Novi Sad, Kyiv and Chişinău, are responsible for the integrity and continuous improvement of the Donau Soja and Europe Soya standard and inspection system.



The Donau Soja Integrity Programme represents the third level of the three-stage inspection system, guaranteeing the integrity of the entire Donau Soja / Europe Soya system and the compliance with our requirements. The Donau Soja Integrity Programme includes different aspects

of verification and control, such as audits at partners and certification bodies, laboratory analyses of soybeans and soya products, and evaluation of satellite data to verify deforestation and conversion-free production.

18 Donau Soja & Europe Soya certification bodies

ABCERT AG (DE)
Austria Bio Garantie GmbH / agroVet GmbH (AT)
Aciter Inspection LLC (UA)
Bioinspekt d.o.o. (HR)
Bureau Veritas d.o.o. (SI)
Control Union Certifications B.V. (NL)
CSQACertificazioni S.R.L. (IT)
FoodChain ID Certification Ltd. (UK)
Jugoinspekt - Novi Sad d.o.o. (RS)
KIWA Agri Food (UK)
LACON GmbH Germany (DE)
Organic Control System (RS)
Organic Standard Ltd (UA)
ProCert Zertifizierungsstelle (CH)
QAL GmbH (DE)
SGS Austria Controll - Co. GmbH (AT)
SGS Beograd d.o.o. (RS)
SLK GsmBH (AT)

A major factor in upholding the high quality of certification lies in approval for Donau Soja and Europe Soya certification from independent certification bodies, and annual training courses for auditors and certification body staff. The Donau Soja quality team is in daily contact with auditors who conduct the regular certification audits at farmers and certified companies to ensure that the requirements are implemented as specified.

The quality management team is constantly coordinating with certification bodies, certified partners, and farmers to guarantee the high quality and consistency of Donau Soja / Europe Soya products. We are always available to provide information about the standards and to answer any questions in order to ensure that our criteria are reliably implemented at all levels of the value chain.

INTERESTED IN CERTIFICATION?

Are you interested in Donau Soja or Europe Soya certification for your company or farm? Do you want to know more about the first steps needed to gain certification? Contact our regional Donau Soja team for more information on how to become a certified partner.

FIELDS OF EUROPE: THE EUROPEAN FOOD AND FEED STANDARD

BACKGROUND

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 ADM, the Royal Agrifirm

Group, Ameropa, BFA, Donau Soja, fenaco and Nevedi aimed to create a standard that reflects demand for clear quality guidelines for European products.

WHY A EUROPEAN FOOD AND FEED STANDARD?

Companies are increasingly choosing to buy and use ingredients of European origin in their feed and food products, not only to preserve traditional European farming practices, but also to close nutrient cycles, reduce food miles and meet the public demand for non-GM products.

Currently, each company independently establishes and verifies European origin. The introduction of Fields of Europe's shared definitions and practices will allow all European supply chains 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 wishing to promote the European origin of their products.

2019

The **Fields of Europe initiative** is formed

2020

The **Fields of Europe standard** is developed & a public consultation on the standard is held (July - October 2020)

2021

The **Fields of Europe GmbH** is founded & the **label** is developed

2022

The **Fields of Europe system** becomes operational & first **pilot projects** are implemented



FIELDS OF EUROPE WILL:

- contribute to an improved understanding of the risks and chances of sourcing from Europe;
- increase market demand for non-GM European soya produced in a sustainable way;
- create a stimulus for farmers outside the EU 27 to join Donau Soja's certification programme in order to produce in line with Fields of Europe;
- lead to fairer competition resulting from the level playing field between the EU 27 and the rest of the European continent.

THE BENEFITS OF FIELDS OF EUROPE:

- creates a trustworthy system for local European origin sourcing;
- applies a single system covering three areas of interest: origin, non-GM and sustainability;
- offers an innovative and efficient verification mechanism;
- facilitates active involvement in co-developing the standard in a multi-stakeholder setting.



Fields of Europe label: verifying European origin, non-GM, sustainability

IMPLEMENTATION OF FIELDS OF EUROPE PILOT PROJECTS

The Fields of Europe organisation was formally founded in December 2021. Fields of Europe (FoE) GmbH is a not-for-profit limited company under Austrian law, and an independent organisation under the umbrella of the

Donau Soja Association based in Vienna. With the creation of the new organisation, the project now enters a new phase – implementing Fields of Europe in the market.

JOIN US!

New companies and organisations are welcome to join the initiative, to participate in the user group and ad-hoc working groups and to implement pilot projects.

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 was planned with the support of the Austrian Development Agency (ADA).

PROTEIN PARTNERSHIPS - A PROGRAMME TO INCREASE SUSTAINABLE NON-GM SOYA CULTIVATION IN EUROPE FOR EUROPE

Building sustainable supply chains is a challenging task. While the demand for sustainably produced agricultural commodities such as soya is growing enormously, these commodities are a major contributor to global CO₂ emissions and thus to the climate crisis. Images of burning rainforests and the effects of growing herbicide-resistant GM soya in monocultures have been omnipresent for years. Of all the agricultural commodities cultivated in areas impacted by deforestation and imported into the EU¹, soya alone is responsible for an incredible 31% of all tropical deforestation incorporated in EU imports, the WWF reports. Therefore, choosing the right source of

soya is an important variable for reducing CO₂ emissions. Donau Soja offers exactly that: the right source.

Together with our partners along the value chain, our goal is to increase soybean cultivation in Europe. At the same time, we strive to integrate sustainably produced, non-GM soya from Europe into European supply chains, and to communicate this to consumers through product labelling. After all, consumers prefer not to purchase food that is directly or indirectly linked to rainforest destruction or genetic engineering.

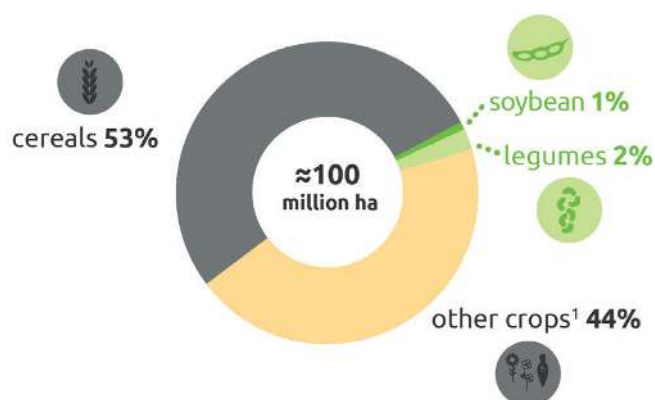
YIELDS IN EUROPE ARE HIGH, PERCENTAGE IN CROP ROTATION STILL VERY LOW - BIG POTENTIAL FOR SUSTAINABLE SOYA CULTIVATION IN EUROPE FOR EUROPE:

Soya yields – global top 10 list*
(t/ha, avg 2012–21):



* the list includes countries with min. 50,000 ha soybean area in 2021.
Sources: USDA + Donau Soja

Cropping of arable land in the EU (2021):



¹ including set-aside and fallow land (area which has been left unplanted for a period of time).
Sources: Donau Soja on basis DG AGRI data

There is significant potential for soybean cultivation in Europe. Although soybeans grow very well in Europe, and harvests in Italy, for example, are among the best in the world, soybeans and legumes currently account for only around 2% of European crops. There is also a question of the economic competitiveness of European soya producers, and the need to establish the relevant premium markets, e.g. for non-GM food. Supply chains are being gradually developed to counteract the frequent failure of supply and demand to match on international spot markets.

In 2019, Donau Soja launched its Protein Partnership Programme to support the development of sustainable sup-

ply chains in Europe. Using a methodology similar to overseas credits, the programme is intended to support and build up the first stage of sustainable soya production, i.e. cultivation and the work of the primary collectors. In many cases, it is the international food retail sector that seeks to make a positive impact and protect the climate by reducing its soya-related CO₂ footprint.

The partnership programme funds and organises hands-on training for farmers and participation in field trials in partner countries. Best practices in soybean cultivation are taught both theoretically and practically, and cover everything from variety selection and cultivation techniques to inoculation and crop protection. Farmers and



cooperatives have access to a broad network of experts for direct knowledge exchange. In addition, different online formats have been developed in response to the COVID-19 crisis: The Serbian „Expert advice for farmers“²

website, the “Soya Discussion Club” in Ukraine, and co-operation with universities and individual companies on specific topics are some examples.

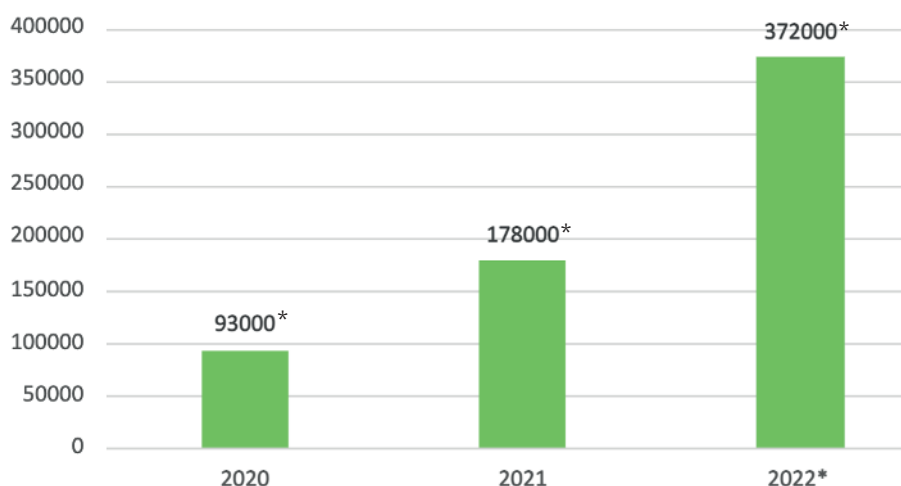


Farmers and cooperatives participating in the partnership programme grow their soya according to the sustainable criteria specified by the Donau Soja / Europe Soya standards. Both they and their first collection points can benefit from free certification as part of the partnership. This means the first stage of the value chain is sustainably certified and both traders and processors can access

these sustainably produced, non-GM European soybeans. The more sustainably produced beans that are available, the lower the cost of segregation and the easier it is to build physical supply chains from field to fork - a win-win situation for all involved.



PROTEIN PARTNERSHIP VOLUMES (IN TONNES)



*status April 2022

¹ WWF Report (2021): https://wwfeu.awsassets.panda.org/downloads/stepping_up_the_continuing_impact_of_eu_consumption_on_nature_worldwide_fullreport_low_res.pdf

² <https://www.donausoja.rs/strucni-saveti-za-proizvodace/>

DONAU SOJA / EUROPE SOYA - A CLIMATE FRIENDLY ALTERNATIVE

What you eat makes a difference: Food consumption accounts for a quarter of each person's greenhouse gas (GHG) emissions. In the production of animal-based food, relevant quantities of GHG are emitted during animal feed production, particularly from soya sourced overseas. While an estimated 11% of global man-made GHG emissions result from deforestation such as clearcutting in the Amazon region, soya alone accounts for 31% of imported deforestation into the EU. So we import not only feed, but also the environmental damage associated with it.

REDUCING CARBON EMISSIONS IN THE EGG SECTOR

Around two thirds of the average GHG emissions in egg production derive from the feed for laying hens. This has been demonstrated in a 2019 study of the Austrian egg sector by the University of Natural Resources and Life Sciences, Vienna (BOKU), and two recent studies by the Research Institute of Organic Agriculture (FiBL Austria) on the reduction potential in German egg production. The results are impressive:

- In 2013, the Austrian egg sector took a huge step towards climate protection and changed to Donau Soja feed. Practically all shell eggs sold through the Austrian food retail chains are produced with Donau Soja feed. With total emissions of 2.8 kg CO₂-eq per kg egg, this corresponds to a reduction of around 36%. As a result of this change, Austrian egg producers avoid producing 110,000 t CO₂-eq annually.
- The use of Donau Soja by the Aigner poultry farm for the Bavarian Thanninger Freiheit brand results in a reduction of around 41% compared to the average German egg.



- Introducing a feed mix consisting of Donau Soja plus other regional legumes for the laying hens on the Teichweiden poultry farm in Thuringia leads to an impressive reduction of 1.4 kg of CO₂-eq per kg egg – a reduction of 49% compared to the average German egg.

REDUCING CARBON EMISSIONS IN THE PORK SECTOR



Three recent studies conducted by FiBL Austria demonstrate that Donau Soja / Europe Soya certified feed resulting in a more climate-friendly method of pork production.

- The production of Edeka's Hofglück pork using Donau Soja / Europe Soya feed generates 2.2 kg CO₂-eq per kg pork (live weight), while comparable production using

soya from overseas creates 3.4 kg CO₂-eq per kg. Donau Soja / Europe Soya feed therefore reduces the carbon footprint by 40%.

- In the production of Swabian Hall pork (BESH), the use of Donau Soja / Europe Soya feed reduces emissions by 1.4 kg CO₂-eq per kg of pork (live weight), thereby reducing the carbon footprint by 31%.
- In the production of Gustino pork, the use of Donau Soja reduces emissions by 1.8 kg CO₂-eq per kg of pork (live weight), thereby reducing the carbon footprint by 42%.



Schwäbisch-Hällisches
Qualitätsschweinefleisch g.g.A.

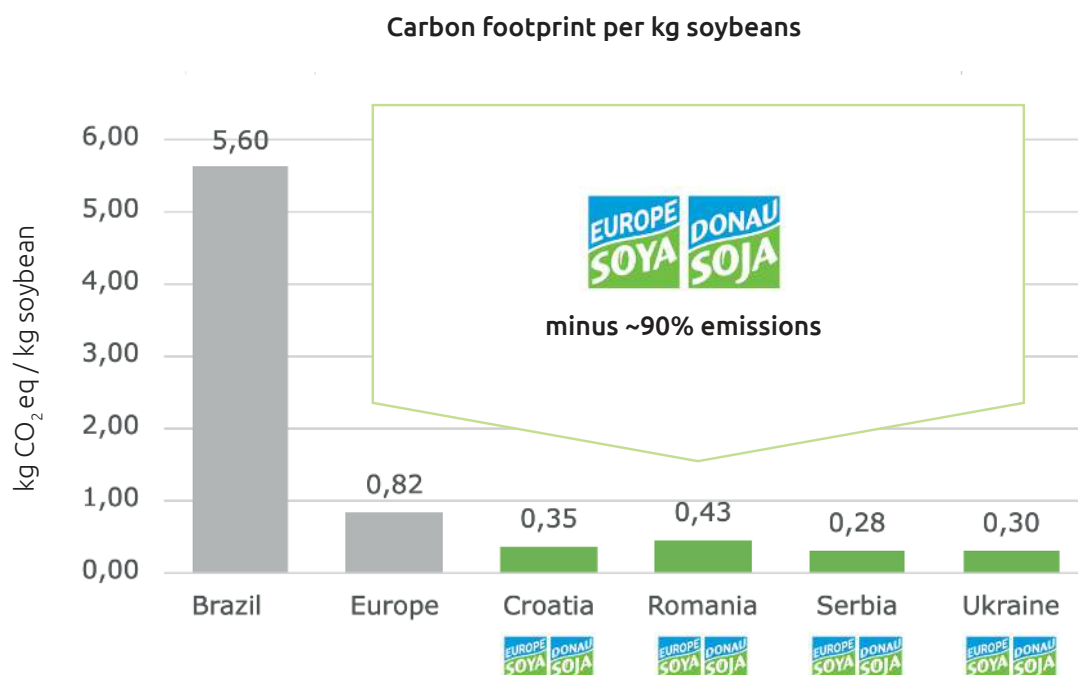


LIFE CYCLE ASSESSMENT (LCA) OF SOYBEANS AND SOYA PRODUCTS

The European agri-food system largely depends on soya: About 34 million tonnes are imported into the EU-27 annually, with more than two thirds originating from South America. The negative environmental impact of soybean cultivation can be enormous. A current study by Blonk Consultants – based on Donau Soja and Europe Soya certified soybeans from four different European countries: Croatia, Romania, Serbia and Ukraine – shows that this can be avoided.

90% REDUCTION IN CO₂ WITH DONAU SOJA

The results show a carbon footprint of 0.3 - 0.4 kg CO₂-eq per kg of Donau Soja / Europe Soya certified soybeans. This corresponds to avoiding 90% of the emissions compared to Brazilian soybeans with a deforestation background (0.3 kg CO₂-eq excl. LUC resp. 5.6 kg CO₂-eq incl. LUC). Donau Soja / Europe Soya also avoids around half the CO₂ emissions compared to average European soybeans.



MINUS 70% CO₂ IN SOYBEAN PROTEIN CONCENTRATE (SPC)

The carbon footprint of soy feed components, such as Soy Protein Concentrate (SPC) is also largely determined by responsible soya cultivation. A 2020 study by the Research Institute of Organic Agriculture (FiBL) Austria shows that the Carbon-footprint of 1 kg Europe Soya-certified SPC provided is 1.6 kg CO₂ whereas the Brazilian SPC default accounts for 6.7 CO₂ per kg SPC, which translates to a reduction of minus 70% of emissions.

DONAU SOJA DATA AVAILABLE IN AGRIFOOTPRINT DATABASE

The environmental impact data for Donau Soja / Europe Soya certified soybeans are publicly available via Blonk Consultant's Agri-footprint database as a so-called „branded dataset“ and can be used for further Life Cycle Assessments (LCA) and carbon footprint calculations.



WHERE THE EUROPEAN SOYBEANS FLOW

MARKET DEVELOPMENT: 715,000 TONNES OF CERTIFIED SOYA IN 2021

Soybean processors certified under the Donau Soja & Europe Soya Standard are at the heart of the value chain when it comes to making available and distributing certified premium processed soya products. Donau Soja has taken the lead in transforming the European protein market towards the more sustainable production and consumption of European soya. After its first decade, Donau Soja is now recognised as the sustainable soya standard-setter for safe, environmentally and socially responsible soya of European origin. The commitment to East-to-West sourcing within Europe contributes to European cohesion, strengthening regional and rural development in deprived rural areas.

Donau Soja has been working with partners across the entire value chain to achieve this transition. Our common goal is to strengthen a certified European-sourced base for soybean and processed soya products, as well as to develop demand and promote the market uptake of soya by markets in Europe searching for high quality.

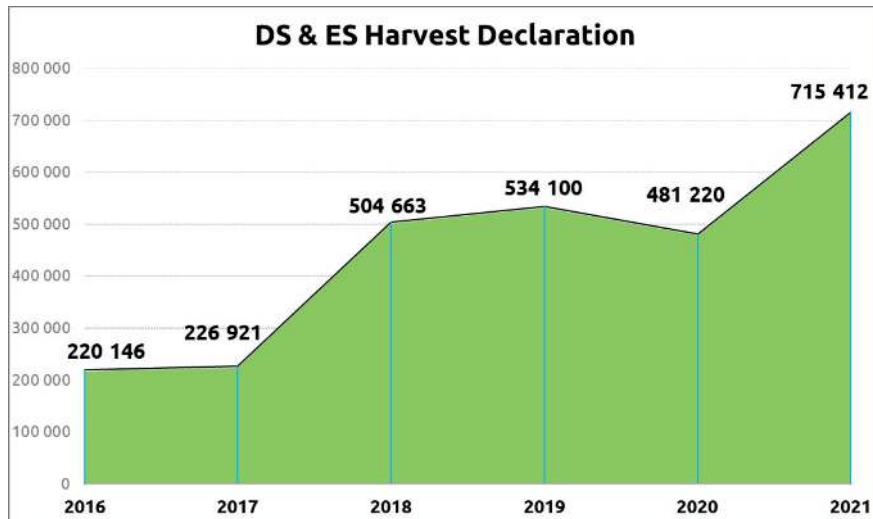
This is a long-term process, bringing together **900 Donau Soja / Europe Soya value chain players**, from cooperatives, traders and processors, to feed and food brands and retailers. A **Donau Soja / Europe Soya certified market has been created, offering added value and long-term benefits for all players.**

Since Donau Soja was established in 2012, **soybean production in Europe has doubled to 10 million tonnes over the recent 10 years** (combined European Union and other European countries). Two thirds of European soybeans are grown in south-eastern Europe. New trends indicate an increase in soybean cultivation in western European countries which are discovering new perspectives and opportunities for soya sourcing and market development.

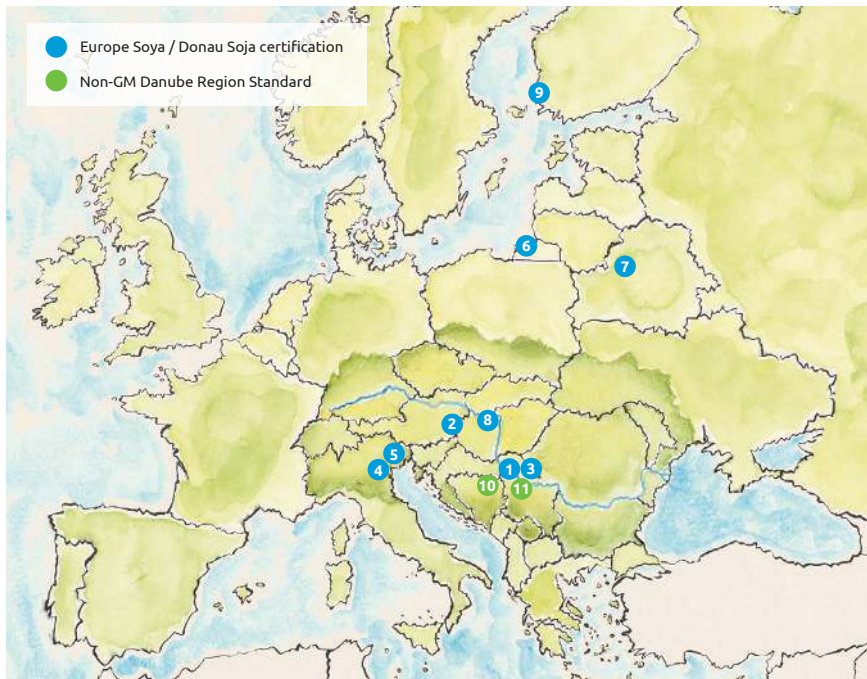
More than 3 million tonnes of soya bearing the Donau Soja or Europe Soya label have been harvested in Europe since 2014, making our standards the gold standard for European soya certification. 715,000 tonnes of Donau Soja / Europe Soya-labelled soya were harvested in the past season, primarily from Serbia (68,000 tonnes), Ukraine (145,000 tonnes) and the European part of Russia (202,000 tonnes). Our standards are encouraging higher EU standards to be met outside the European Union.

Today, over 160 collectors and more than 11,000 farmers, mainly on small and medium sized farms, are producing soya according to Donau Soja quality requirements.





The number of businesses committed to processing sustainable and traceable European soya is constantly growing. All leading European oil mills and more than 20 smaller processors provide a wide range of soya products in certified non-GM, sustainable quality and European origin. These companies offer a wide range of high-quality soya products for animal feed and human consumption, including soybean meal, soya protein concentrates, press cake, toasted soybeans, oil and lecithin.



Oil mills with ES/DS certification:

01. Sojaprotein/ADM, Becej (RS) – ES
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 Soya



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: 24.08.2022

390,000 TONNES OF SOYA PRODUCTS SOLD TO END CUSTOMERS

Soya products are used in a variety of branches. The lion's share of Donau Soja & Europe Soya products is used **in fish feed for Scandinavian aquaculture and feedstuff for livestock production**, such as laying hens, poultry or pork production, mainly in Germany, Austria and Switzerland. A smaller but steadily growing share goes to the production of highly demanding **plant-based products** such as plant meat, providing high quality ingredients for this fast-growing market.

Development of market uptake of DS / ES certified soybeans



The volume of processed soya products is steadily growing and reached a record 390,000 tonnes in 2021, a 40% jump over the previous year. **An increased demand for sustainable, European soya components for fish feed contributed to a significant jump in market uptake.** While this is a promising trend, there is still plenty of room for growth and we continue to support companies and even entire sectors across Europe as an active partner on our shared path to sustainable, certified soya from Europe.

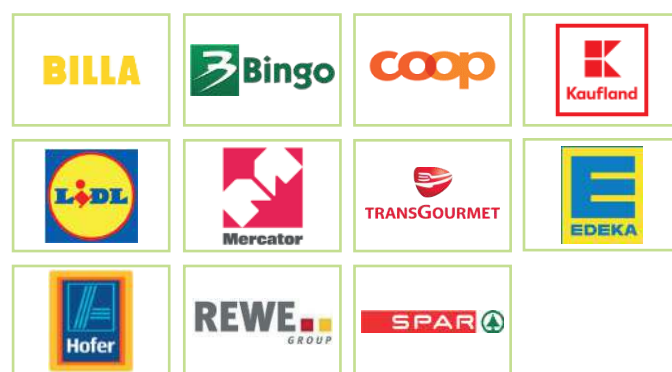
RETAIL CHAINS OFFER CERTIFIED AND LABELLED DONAU SOJA / EUROPE SOYA PRODUCTS

Retailers and major food brands, together with Donau Soja, are helping to establish reliable non-GM, sustainable soya-certified supply chains, from Europe for Europe. Prominent Donau Soja labelling on products allows our partners to directly raise awareness of their efforts amongst the consumers themselves. Starting at the beginning of the long and complex food supply chain, Donau Soja is helping them transform their businesses and supply chains, bringing them significant advantages and notable success.

Eleven retail chains are offering certified and labelled Donau Soja, Europe Soya and non-GM Danube Region standard products. Animal-based products, such as eggs "fed with Donau Soja & Europe Soya", are reaching tables in fast food and full-service restaurants,

such as McDonald's. A wide range of products bearing one of the Donau Soja quality labels are available in Austria, Germany, Switzerland, Croatia, Serbia and BiH, and include poultry and pork, eggs and plant oils.

The fast-growing plant-based food sector in Europe is also showing increasing interest in Donau Soja / Europe Soya certified soya food ingredients. Soya-based products such as protein concentrates or texturised soya protein are sold as ingredients to plant-based food businesses which value sustainability and local sourcing.



BEYOND SOYA - NEW TRENDS AND INITIATIVES

After 10 years spent developing and strengthening European soybean production along the value chains, Donau Soja recognises the need for a diversified future. In order to extend our certification to other protein crops and grains, Donau Soja has integrated the crop mix into the Donau Soja-Multi Crop standards portfolio. This opens new possibilities for standardisation and verification of European feed and food of European origin. As one of the founders of the "Fields of Europe" European sourcing framework, Donau Soja is moving forward by adding brands, and upscaling standards and the quality of feed and food products on the European market.



It was Matthias Kröns vision and his courage that have allowed us to build an international quality brand. Congratulations to the entire team! Our SPAR pork study was initially only intended to supply the Austrian market with European soy.



Franz Hölzl

Former Head of Sustainability at Spar, initiator of the pork study

The soy issue touched me from the very beginning: it concerns sustainability, nutrition, deforestation, our protein supply, and much more. It was clear to me that I wanted to be part of this. Now 10 years of Donau Soja and many good things have happened – my heartiest congratulations.



Ursula Bittner

Co-founder of Donau Soja, economic expert at Greenpeace CEE

Austria has already achieved considerable successes in terms of soy production and Donau Soja plays a key role in this development. I would like to express my gratitude for your ongoing commitment towards sustainable European soy production, and congratulate you on your 10th anniversary.



Elisabeth Köstinger

Former Austrian Federal Minister of Agriculture, Regions and Tourism

Congratulations to Donau Soja for the successful evolution of the philosophy of an independent, regional, sustainable, and GMO-free protein supply for Europe. May the responsible persons succeed in becoming even more successful in meeting social, ecological, and economic demands.



Helmut Brunner

Former Minister of State in Bavaria

Soybean is often seen as an unsustainable option for replacing animal-sourced protein, and one to be avoided. However, when grown sustainably in a manner which avoids deforestation, soybean is a valuable source of high quality protein for human nutrition, and does not require nitrogen fertilisers.



Dr. Thomas Nemecek

Deputy Head of Life Cycle Assessment Research Group at Agroscope

We are looking forward to joining Donau Soja in organising the 11th World Soybean Research Conference in Vienna in June 2023. After a decade of successful cooperation, we are on the right track, and dedicated to recording new joint achievements in the future.



Prof. Dr. Jegor Miladinović

Principal Research Fellow and Soybean Breeder at IFVCNS, Serbia

I am honoured to be part of the Presidium at Donau Soja and I appreciate all the passion the team puts into striving for a common goal. It is impressive to see everything that has been achieved within the last 10 years. I am looking forward to the future and I am sure it will be extraordinary.



Michael Duspiwa

Head of Purchasing and Trade at Fixkraft Futtermittel GmbH

Congratulations on your 10th anniversary. Donau Soja has managed to set up a workable traceability system incorporating the stringent non-GMO requirements demanded by retailers and customers. We support this endeavour and wish Donau Soja much success in the years to come.



Dr. Michael Gohn

Fritz Mauthner Handelsgesellschaft and Probstorfer Saatzeit

ADA AND DONAU SOJA: USING SUSTAINABLE SOYA VALUE CHAINS AS AN ENGINE FOR DEVELOPMENT

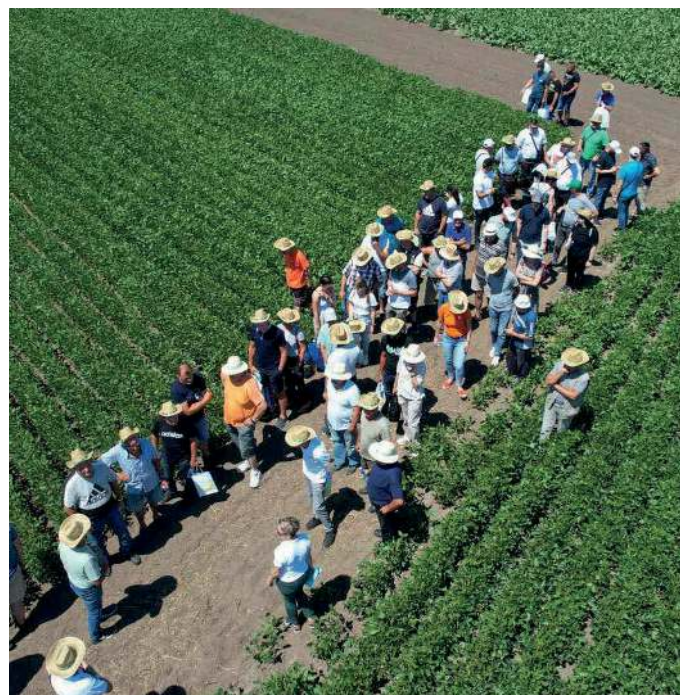


STRATEGIC PARTNERSHIP BETWEEN ADA AND DONAU SOJA

The Donau Soja Association activities are supported by the Austrian Development Agency (ADA). Donau Soja is currently implementing a EUR 9 million 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“) over a period of 7 years (2017-2024). The project is 50% funded by ADA and 50% by Donau Soja.

Donau Soja is promoting a sustainable protein supply from Europe for Europe. This is achieved by Donau Soja teams who bring knowledge and state-of-the-art technologies, promote investments, build networks, link markets, promote market transparency, introduce quality management measures and Donau Soja requirements, and advise local stakeholders - from farmers to politicians. The work is also conducted in the EU's neighbourhood, an area in which soybeans are traditionally grown. This was recognised by the Austrian Development Agency (ADA), the agency for Austrian development cooperation, resulting in a Strategic Partnership with Donau Soja that started in 2017 and extends through to February 2024. The project value is EUR 9 million, financed equally by ADA and Donau Soja. This support has allowed Donau Soja to open offices in Kiev (Ukraine) and Chişinău (Moldova), and to enlarge the office in Novi Sad (Serbia) from where Donau Soja organises support for the production and processing of soya in Southern and South-Eastern Europe. The extensive programme builds environmentally friendly, inclusive, and non-GM European value chains in local soya production and processing; creates bridges between Southern and South-Eastern Europe (traditional soybean producing countries) and the EU (soybean consumer countries); and contributes to climate protection.

Hence, soya value chains are recognised as an engine for enabling sustainable, inclusive economic development, and meet United Nations' Sustainable Development Goals (SDGs).



To date, after 5 years of implementation, more than 15,000 stakeholders in agriculture and related sectors in the Ukraine, Serbia, Bosnia and Herzegovina, and Moldova have all benefited from the partnership project. The target groups of the initiative are all actors along the soya value chain – from farmers, cooperatives, traders and processing companies, to input suppliers, agriculture knowledge and innovation system institutions and certification bodies, consumers as well as governments. A special focus is placed on production and processing stakeholders, with the goal of improving their access to local, regional, and international markets.



Donau Soja offers a wide range of training courses on best production practices, quality management, environmental, labour and social standards and also market development. Information events on soya cultivation, the latest research, and marketing the harvest complement the programme. The programme is also inclusive towards vulnerable groups. Currently, more than 60% of the beneficiaries are small and medium-sized farmers. Many of those joining the initiative have succeeded in upgrading their work through participation in international value chains.

The current Strategic Partnership between ADA and Donau Soja places particular emphasis on promoting gender equality. Various initiatives and projects have been launched to promote and encourage women to be active in agriculture and soybean production and processing. In Ukraine, for example, Donau Soja created a prize to motivate young female agricultural scientists to work in this field. To date, 23% of all Strategic Partnership participants are women, reflecting the impact of Donau Soja's gender sensitive monitoring system. This is achieved through Donau Soja actively promoting its activities to women, inviting them to take part, and creating an empowering environment.

In five years, more than 1 million tonnes of Donau Soja certified soybeans have been produced in the target countries and included in European value chains. Supporting the cultivation areas in Eastern and South-Eastern Europe and creating additional markets such as the feed sector in Germany and northern European aquaculture, as well as in the food sector, should lead to the reduction of GM-feed and non-sustainable soya imports. As part of the project, Donau Soja has started research into the impact on the carbon footprint of food and feed products; the results show that by using Donau Soja / Europe Soya, roughly 40% of the greenhouse gas emission generated in traditional soya cultivation can be avoided.

Preserving the environment and natural resources are a priority of the cooperation project. Donau Soja places special attention on promoting environmentally friendly technologies when implementing its activities.

Activities for the target groups focus on environmental standards, resource efficiency measures, and climate change adaptation measures. The aim is to develop the capacities of the individual participants: courses and seminars include topics such as precision agriculture, integral and organic production technologies, the reduced use of pesticides, inoculation and the use of non-GM seeds. Throughout the project, environmentally friendly technologies are recommended to farmers during workshops and field days and tested by using demonstration platforms.

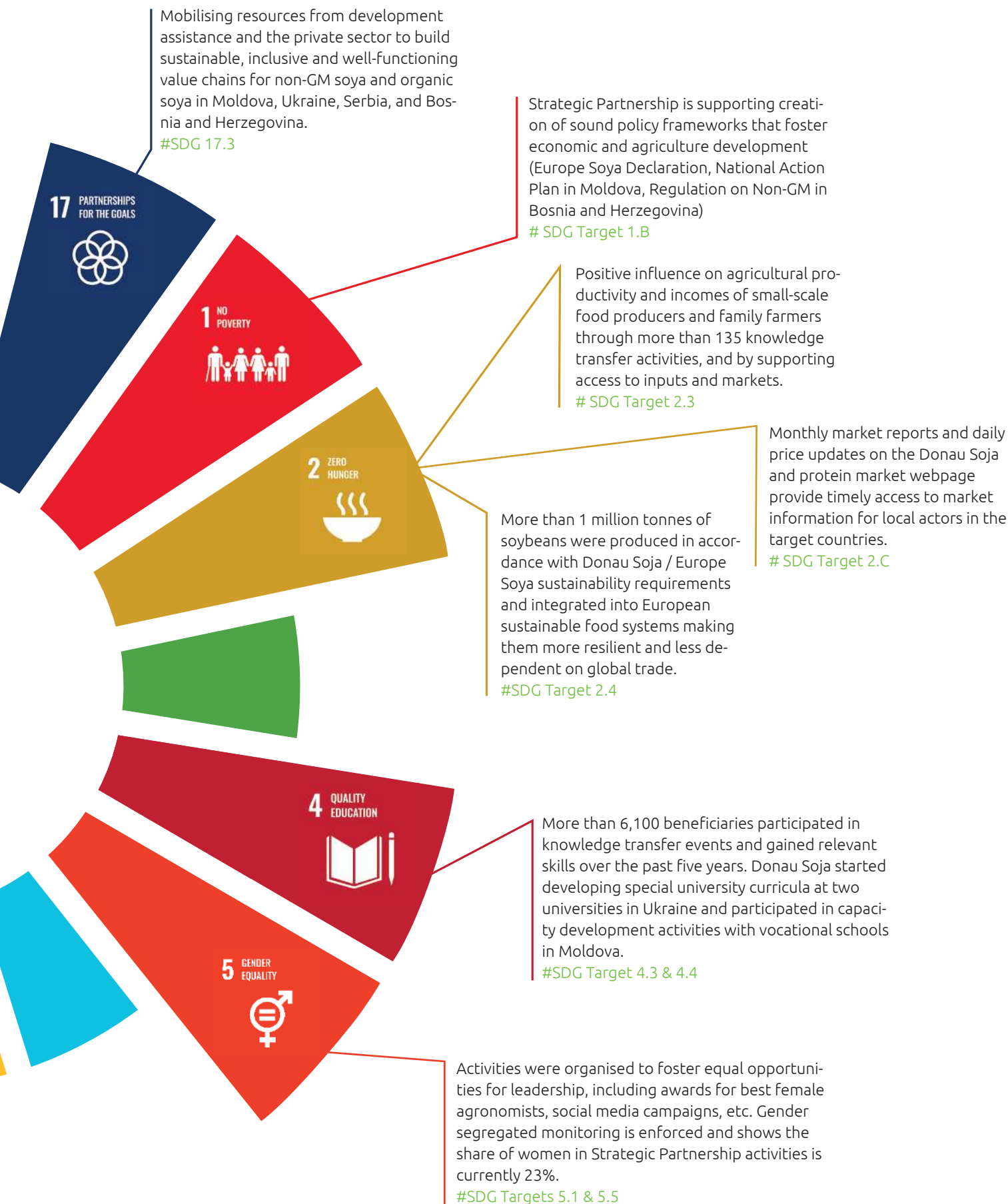
Many other activities including marketing, local and international market development, standards development and benchmarking, research and innovation, protein partnerships and raising public awareness are also supported within the Strategic Partnership. These are described in more detail in other chapters of this report.



THE STRATEGIC PARTNERSHIP'S CONTRIBUTION TO THE SUSTAINABLE DEVELOPMENT GOALS

Our results in the past 5 years support and are aligned with SDG Targets.





UKRAINE AS A KEY EU PARTNER FOR PROTEIN SECURITY

One of Donau Soja's key goals in Ukraine is to increase the competitiveness and attractiveness of the Ukrainian soya sector. There is huge growth potential for soybean production and processing in Ukraine, with technological advances making total yields of 6 million tonnes per year realistic. This makes Ukraine a key partner for the EU when it comes to achieving protein security. We pay close attention to ensuring synergies with all market players, and Donau Soja plays a role as a bridge between Ukraine and EU countries.

Ukraine views the EU as an important high-value market in its immediate neighbourhood, and therefore its producers are eager to meet buyers' expectations when it comes to sustainability. This requires, among others, that producers commit to non-GM production, especially for soybeans.

Donau Soja has been operating in Ukraine since 2015, opening its regional office in Kyiv in 2018. Donau Soja activities in Ukraine are aimed at raising awareness of non-GM soybean growing technology, providing support to young professionals, and promoting gender mainstreaming initiatives.

Knowledge transfer and best practice dissemination

Donau Soja's Ukrainian office dedicates much time and effort to disseminating know-how. These projects expand professional knowledge in the field of traditional and organic farming technologies, quality management, and promoting compliance with the Donau Soja and Europe Soya standards.

Since 2018, the Donau Soja office in Ukraine has conducted a series of workshops and conferences for soya producers:

2018: The Donau Soja Study Programme "Live case on non-GM soya cultivation: how to grow efficiently and to become highly competitive" was delivered in five regions of Ukraine with participation of more than 120 farmers.

2019: With the support of Austrian Embassy in Ukraine, Donau Soja conducted a one-day training programme on "Drought in Ukraine: Successful Soil Moisture Management Technologies", in the Poltava and Sumy regions.

Donau Soja Crop Tour in Ukraine: Since 2020, Donau Soja has conducted regular Crop Tours. Their primary

goal is to assess where know-how is needed and to determine potential soybean yields based on the state of the fields in Ukraine. Another goal is to use strip tests to measure the share of GM-soya in Ukraine. Donau Soja's Crop Tour 2021 covered three quarters of the total area under soya cultivation in Ukraine. The Crop Tour results were used to develop the supply/demand balance of soybeans in Ukraine for 2020/21.

2022: Donau Soja Conference: „Soya Jackpot as the Long Run Game“ was hosted jointly with the Commercial Counsellor's office at the Austrian Embassy in Ukraine. Experts in sustainable, non-GM soya production discussed a new approach to improving soybean cultivation in times of climate crisis.

2020-2022: Soya Discussion Club. Donau Soja in Ukraine has initiated a new knowledge exchange format – a closed agronomic online event with leading experts, scientists specialised in soybeans, and farmers from various regions of Ukraine who grow soybeans using different technologies, broadcast live on the Donau Soja Ukraine Facebook page. The information generated is provided to farmers who want to succeed in growing soybeans and/or have no prior experience. The Soya Discussion Club has met ten times since 2020, generating a total of around 28,000 views.



Use of demonstration fields to meet demand for know-how in non-GM soya cultivation.

Donau Soja establishes trial plots and demonstrates best practices in non-GM soybean production on a regular basis. In 2018 and 2019, Donau Soja Field Days were attended by around 500 farmers.



The “European Sustainable Soya Academy (ESSA)” educational and research partnership project

Donau Soja is developing two pilot projects in cooperation with the Sumy National Agrarian University (SNAU) and the Bila Tserkva National Agrarian University (BTsNAU), to educate farmers and students at agricultural universities about soybean growing technologies. Handbooks for students, covering conventional and organic soya cultivation technologies, were developed in partnership with companies, input providers, and our agricultural consultant in Ukraine.

Gender dimensions

The Donau Soja office in Ukraine launches initiatives and projects which host inspiring meetings to encourage women to be active in agriculture.

„Best Young Agronomist. Lady.“ & „Best Young Agronomist. Soya.“

Since 2013, the country's Agroexpert magazine has regularly held its all-Ukrainian „Best Young Agronomist“ contest. Its purpose is to identify successful young men and women who have chosen agronomy as their profession. In 2019, Donau Soja initiated special classes of nominations for the competition, namely „Best Young Ag-

ronomist. Lady.“ and „Best Young Agronomist. Soya“. Six young agronomists have been nominated by Donau Soja. In 2021, the award winners were invited to Austria to visit the Austrian Development Agency (ADA), the University of Natural Resources and Life Sciences (BOKU) in Vienna, as well as farmers and other scientific institutions.

Value chain development

As the number one producer and exporter of soybeans in Europe, the eighth largest in terms of global production, and number six when it comes to global soybean exports, Ukraine plays an incredibly important strategic role in the European soybean market. However, it often faces export obstacles. Donau Soja has conducted a series of events to demonstrate the huge potential represented by the soya industry in Ukraine.

Networking events nurture trade relations between Ukraine and EU:

Buyers' Missions

Since 2019, Donau Soja has conducted a series of Buyer's Mission events to demonstrate the potential of the Ukraine soybean industry. At the first Buyers' Mission in spring 2019, nine international companies interested in Ukrainian non-GM soybean production spent an intensive day networking with representatives from 15 leading companies in Ukraine's soya sector. They visited the TIS and MV Cargo terminals in the Odessa region, the modern AdamPolSoya non-GM soybean crushing plant in the Khmelnytsk region, and the Agroprosperis Group soya fields in the Sumy region.

In autumn 2019, Donau Soja organised another visit to Ukraine for representatives of the largest French cooperative, Solteam, to contract long-term supplies of sustainable non-GM soybean meal. Solteam representatives visited the processing facilities at the largest Ukrainian soybean processors - Donau Soja members ATK and As-tarta-Kyiv.

In 2020, an international online Buyers' Mission involving 45 participants from 12 countries was organised to provide information on the current state of the new crop, the state of the markets, and market readiness for the new season, also in the light of the COVID-19 pandemic.

Virtual Field Trip to Ukraine

In 2020, Donau Soja organised a virtual Field Trip through Ukraine for 21 participants, to demonstrate the potential for sustainable soybean cultivation in Ukraine. The programme included legislative and market information related to Ukrainian agriculture, and information on regional sustainable soya supply as a climate saving initiative. Special attention was paid to the Donau Soja Protein Partnership Programme.

Donau Soja Annual Meetings

The first Annual Meeting of Members and Partners of Donau Soja was convened in Ukraine in January 2019, in strategic partnership with the Austrian Development Agency (ADA). The meeting achieved great results for local non-GM market development and export capacity-building which will benefit Ukrainian producers through fruitful cooperation with like-minded partners and friends. Another Annual Meeting of Members and Partners of Donau Soja Association was held in 2020, together with 73 Donau Soja partners in Ukraine.



Ukrainian National Stand at key European exchanges in 2022

To overcome the export challenges caused by the military block of the Black Sea ports, Donau Soja, together with the Ministry of Agrarian Policy and Food of Ukraine, organised the Ukrainian National Stand and Information "UKRAINE – Current Commodity Exports and Logistics, Challenges and Opportunities" event which has been held at the major European agricultural exchanges in Prague, Milan, Budapest and Vienna.

International exhibitions

In order to present EU sustainability approaches and promote soya cultivation and European value chains, Donau Soja exhibited at the international Agro Animal Show exhibition in 2021 and 2022.

Protein Partnership Programme (PPP)

Donau Soja's Protein Partnership Programme started in Ukraine in 2021. It is designed to disseminate know-how

about modern agronomical techniques to Ukrainian farmers to increase sustainable non-GM soya production in Europe for Europe and to secure a sustainable European protein supply. A particular value of this approach lies in developing local soya production (Danube region) which increases agricultural sustainability and reducing on-farm carbon footprints through the use of improved soya varieties, certified seeds and proper fertiliser management. Protein Partnerships are an important tool to increase sustainable non-GM soy production in Europe for Europe, to secure the European non-GM market, especially in the DACH region.

Participation in policy formation

The Donau Soja office in Ukraine takes an active role in developing the regulatory framework in Ukraine, with the goal of creating favourable conditions for agribusiness, including organic production, expanding foreign trade, and establishing effective legislation to control GM in Ukraine.

- Together with its partners, Donau Soja is helping to develop local markets, improving the competitiveness of Ukrainian soybean production and processing.
- Donau Soja cooperates with the Austrian Embassy in Ukraine to develop business relations between the two countries and at EU-level.
- Donau Soja is a permanent member of the Agricultural Committee of the Chamber of Commerce and Industry of Ukraine, and works to develop exports and bilateral trade.
- Donau Soja and the Ministry of Agrarian Policy and Food of Ukraine have organised EU-Ukraine ministerial discussions on the current challenges and opportunities for Ukrainian commodity exports.
- Last but not least Donau Soja is also helping Ukrainian farmers overcome the challenges caused by the war and to increase sustainability in several projects
- DS Ukraine also actively contributes to the Governmental Working Group (under the Ministry of Economic Development of Ukraine) to develop a new GMO law "On State Regulation of Genetic Engineering Activities and State Control on the Turnover of Genetically Modified Organisms and Genetically Modified Products to Ensure Food Safety".



THE DONAU SOJA REGIONAL CENTRE NOVI SAD – AN IMPORTANT HUB FOR MANY PROJECTS

The Donau Soja Regional Center Novi Sad (DS RCNS) was founded in 2014, in the heart of the fertile plains of Serbia's Vojvodina region, one of the primary soybean growing areas in south-eastern Europe. The DS RCNS currently employs eight experts who provide professional support to our partners in a variety of working areas.

Over the past eight years, a large number of prominent soya market players from this region have recognised Donau Soja's vision and joined us on the path to a sustainable European protein supply. We are proud of our work over the past years which has been dedicated to promoting environmentally and socially responsible non-GM soybean production within the region. We have helped to add value through Donau Soja standardisation, market development and contributions to the business and political environment which benefit the production, processing, trading, and use of soybeans.

The DS RCNS strategy takes the dual approach of driving local and regional market development and fostering access to export markets. By working together with our partners – cooperatives, companies, and agricultural producers – more than 700,000 tonnes of Donau Soja soybeans were certified in this region in the three years from 2019 to 2021. Around two thirds of these soybeans have been exported to buyers across Europe who demand the highest standards, with the residual quantities remaining available for use by local processors. These excellent achievements are the result of long-term cooperation in building up Donau Soja / Europe Soya certified supply chains. A wide range of certified companies and more than 140 cooperatives work together with over 6,000 agricultural producers from the region as part of the group certification system.



In addition to developing a high-quality, certified, soybean raw material sourcing base, Donau Soja has worked with numerous regional oil mills and primary processors from its base in Novi Sad to provide Donau Soja / Europe Soya-certified soya processed products such as soybean meal, soya protein concentrate, cake, toasted beans, and soybean oil. These high-quality soya products are valuable ingredients for the feed and food industry in both foreign and domestic markets. We have established long-term business relationships by supporting partners through the implementation of standards, B2B matchmaking and networking, so that Donau Soja / Europe Soya products from this region are now recognised in markets across Europe.

Along with Donau Soja's mission of linking European farmers to European consumers, DS RCNS has been hard at work offering Donau Soja certified and labelled food products to local and regional consumers, also in partnership with egg producers and retail chains. Donau Soja-labelled products have been available to consumers in Serbia since 2016. Mercator S was the first retail chain in this re-

gion to offer fully traceable, certified eggs from laying hen farms fed with Donau Soja. From 2021, Donau Soja-labelled eggs have been available to consumers in all Lidl stores in Serbia.

In addition to Donau Soja and Europe Soya standards, the Donau Soja Regional Center in Novi Sad has been working on the development and application of the non-GM Danube Region standard in the market. Fourteen Ministries of Agriculture from countries in the region and other relevant institutions have been involved in the process of developing the standard, with the aim of creating the first regionally harmonised non-GM standard for the European feed and food market. Under Donau Soja's guidance, in 2017 Bosnia & Herzegovina became the first country to incorporate this standard into its national guidelines. Over the following years, two leading companies in BiH – the Bingo retail chain with its laying hen farms, and Bimal, a plant-based oil producer - have certified their products. This is a great success for this region, giving consumers in BiH the option of choosing eggs and plant-based oils certified with the Donau Soja "non-GM Produced" label. A wide range of awareness raising activities have been organised together with certified companies and in cooperation with the Food Safety Agency of BiH and three jurisdictional Ministries, including press work, digital promotions and a large joint media conference. As of 2020, non-GM certified and labelled eggs have also been available in Croatia, thanks to the Agroklaster co-operative which, together with its partners, produces and distributes non-GM labelled eggs to retail chains and shops across Croatia.



For the certification process to be successfully implemented and all Donau Soja / non-GM Danube Region Standards' requirements convincingly verified, DS RCNS has established a long-term cooperation with the SGS Belgrade, Jugoinspekt, Organic Control System, Organska kontrola, and Bureu Veritas regional certification bodies.



Over the last eight years, Donau Soja in Novi Sad has been actively working on knowledge transfer and the dissemination of the best sustainable non-GM soybean production technologies to farmers. Numerous training courses and materials, study tours, demonstration fields and field day events have been organised in the region. More than 50 different soybean varieties, products and production technologies have been tested each year in partnership with leading local, regional, and international input providers (seed companies, plant nutrition and protection producers), machinery and equipment and service providers, as well as institutes and accredited laboratories. All the demonstration fields are cultivated in accordance with Donau Soja's Best Practice Manuals and Donau Soja principals of soybean production. Donau Soja Field Days are meeting places and visited by hundreds of farmers each year who come to demonstrate and discuss sustainable Donau Soja agricultural practices. Moreover, in order to provide farmers with access to best practice information throughout the year, DS RCNS launched an online demonstration field platform in 2020 which offers demonstration field presentations and recommendations for Donau Soja sustainable practices in soybean

production. Educational materials in a variety of formats are regularly shared via local Donau Soja social media networks and address the entire agricultural community. The Novi Sad team is actively involved in implementing Donau Soja's Protein Partnership projects with LIDL, BIO-MAR and REWE in this region. Over the past three years (2020 until 2022), more than 280,000 tonnes of Donau Soja soybeans were certified in Serbia, Croatia and Bosnia-Herzegovina. Numerous Protein Partnership partners, including 29 cooperatives, have been assisted with Donau Soja standard implementation and certification. The regional centre has organised educational activities for farmers, including workshops, webinars and teaching materials which reach over 3,000 farmers in this region. Right from the start, the Regional Center in Novi Sad has been actively involved in projects supporting Donau Soja's goals. So far, three projects have been successfully completed:

- **"GMO-free quality soya from the Danube region" (2014 - 2017), in cooperation with the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ);**



- **Interreg Danube Transnational Programme "Local Economy and Nature Conservation in the Danube Region" (2017 - 2019); and**
- **"Organic Knowledge Network on Monogastric Animal Feed — OK-Net EcoFeed" (2018 - 2021) within the framework of HORIZON 2020.**



The DS RCNS is currently working on the "Building Sustainable, Inclusive and Well-Functioning Value Chains for non-GM soya and organic soya in Moldova, Ukraine, Serbia and Bosnia and Herzegovina" project which began in 2017 and is funded by the Austrian Development Agency (ADA).

The DS RCNS cooperates closely with regional ministries, government agencies and stakeholders to create a favourable policy and business environment for sustainable soybean production. By jointly participating in and contributing to a range of agricultural policy forums, roundtables, conferences and media presentations, we are encouraging greater collaboration between policy stakeholders in Europe and the region. Our work is widely recognised by policy makers, as evidenced by their eager participation and support of Donau Soja events including field days, conferences, and regional networking events.



THE MOLDOVA OFFICE – DONAU SOJA'S ACTIVITIES IN A PROMISING COUNTRY

The agro-climatic conditions in the Republic of Moldova are favourable for soybean cultivation and expansion, with the result that soybean is the leading grain legume grown in Moldova today.

Local soybean consumption in Moldova is estimated at nearly 100,000 tonnes of which almost half comes from imports, although Moldovan farmers are fully capable of replacing these imports with local quality production. Donau Soja has been present in the Republic of Moldova since 2015, after the signing of the Donau Soja Declaration by the Moldovan Minister of Agriculture and Food In-

dustry. In 2018, Donau Soja registered its representative office in the country with two employees.

Donau Soja's Moldovan office is tasked with working together with civil society, policy makers and major enterprises in all segments of the value chain, from seed production to the supply of soya for food and feed, to promote the production of non-GM soya. Its focus in 2022 lies on producers and institutes and establishing Protein Partnerships to support and educate farmers on growing soybean in accordance with Donau Soja's Best Practice Manual.

DEV RAM



In recent years, the European Union has increasingly supported improvements to the living standards of the rural population, especially those working in the agri-food sector, a key sector of Moldova's economy.

Moldova has been an Austrian Development Cooperation priority country since 2004. In 2017, the Austrian Development Agency (ADA) and the Delegation of the European Union to the Republic of Moldova agreed the EU's financial contribution to the Development of Rural Areas in the Republic of Moldova (DevRAM) programme.

The EU-funded project "DevRAM Part I - Increasing the competitiveness of the agri-food sector through integration to domestic and global value chains, in particular in the soya sector" was implemented during the period April 2018 to August 2021, by ADA together with Donau Soja, the Pro Didactica Educational Center, the Ministry of Agriculture and Food Industry and the Ministry of Education, Culture and Research of Moldova as partners. The project was designed to improve existing quality standards and build capacity in agricultural education and training, as well as to increase the competitiveness of Moldova's agri-food-sector with a special focus on the soya value chain.

The project was undertaken by the Donau Soja team in Moldova. The activities covered the entire soya value

chain and included primary production, market development and certification. Social and environmental standards as well as gender equality were all considered. More than 890 beneficiary institutions, organisations, businesses and 5,000 individuals (employees, farmers, teachers, students) participated in the project. A National Action Plan for the development of the soya value chain was established. Farmers and producers were trained in best practices for sustainable soybean production, and certification bodies were trained on the Donau Soja standard. Existing soya production and processing quality standards were improved, and capacities in agricultural vocational education and training were strengthened to ensure the impact of the project over the long term.



THE PROJECT ACHIEVEMENTS

Thanks to the support of the EU and the DevRAM project, in three and a half years Moldovan research institutions have participated in a total of eight international research & development or agricultural knowledge and innovation systems events, and benefitted from the availability of modern equipment, enhancing their capacity to supply the market with new soya cultivars and more efficient production techniques. A seeding machine and two threshing machines were purchased for the research undertaken by the Research Institute of Field Crops (ICCC) "Selectia". Seed splitting, cleaning, and sorting machines, 1,000-grain counters and laboratory site sets were also donated, as was equipment for training rooms for farmers. This will make the institute a centre of excellence and support its efforts to transfer knowledge.



14 Moldovan soya producers and one trader (Prograin Organic) have been certified according to the Donau Soja Standard, and one Moldovan soya processing company (Angromix77) certified according to the "Non-GMO produced" standard, making the first local certified soya products available to Moldovan consumers.

The Republic of Moldova has also succeeded in accessing a new European market destination by exporting organic soya to Spain. This step involved assessing the Moldovan biosafety regulatory framework, as well as developing and integrating the National Action Plan for the Development of soya production into the National Agriculture Development Strategy. Following cooperation with the Moldovan Ministry of Agriculture and Food Industry and the recommendations of Donau Soja, subsidies for legumes and compensatory payments for nitrogen-fixing crops have been included in the Subsidy Regulation in Moldova for the first time.

Furthermore, Moldovan agricultural R&D institutions have signed three cooperation agreements with their counterparts from Bulgaria, Serbia and Romania. The project activities include organising soya demonstration fields and study visits for Moldovan producers. All in all, 46 best practice dissemination events and twelve public workshops for farmers, producers and policy makers have been organised, over 700 people trained, and two manuals on soya cultivation published. Farmers, researchers, ministries and vocational education training schools attended national and international exhibitions, fairs and study visits.

Donau Soja has actively supported the work of project partner Pro Didactica which enjoyed significant achievements in its work with agricultural vocational schools. These schools have benefitted from strengthened organisational capacities, with their managers and teachers trained to better respond to current market needs and to connect graduates and the business community.

With the founding of Donau Soja, Matthias Krön has succeeded in spreading the appeal of Austrian soybean cultivation to the cultivation areas throughout the entire Danube region, thus establishing the most important transnational protein initiative in Europe.



DI Helmut Feitzlmayr
Head of the Department of Crop Production at the Chamber of Agriculture of Upper Austria

Happy birthday Donau Soja, long term partner for a GMO-Free Europe! Today, locally grown plant proteins have become the focus of climate and farm-to-fork strategies. We have come a long way in the past decade – and that was just the beginning. See you at our next GMO-Free Regions Conference.



Benedikt Haerlin
Berlin director of the Foundation on Future Farming (Zukunftsstiftung Landwirtschaft)

Donau Soja pursues the goal of producing sufficient protein feed in Europe to become independent of genetically modified soy imports from overseas. This project was launched during my term as Austrian Minister of Agriculture, with the signing of the Donau Soja Declaration by 11 states.



DI Nikolaus Berlakovich
President of the Chamber of Agriculture Burgenland

Congratulations to Donau Soja on its 10th anniversary. Austria plays a pioneering role in Europe in terms of regional protein feed. This makes us more independent of imports, enhancing the security of supplies as well as climate protection.



Josef Moosbrugger
President of the Austrian Chamber of Agriculture

Austrian food production must become independent of genetically modified soya imports. For ten years now, Donau Soja has been generating important momentum for achieving this ambitious goal. Congratulations and keep up the good work.



Lukas Wiesmüller
Spar Österreichische Warenhandels AG, Donau Soja Board

On an individual level, each of us has the chance to influence others to do better. It's just a question of serving as a positive role model by living the values we believe in and care for. That is the spirit of Donau Soja for me.



Stephan Dorfmeister
Donau Soja Board

For the last ten years, the Environment Agency Austria has been successfully working together with Donau Soja, both in developing GMO-free standards and in risk assessment. Congratulations on your tenth anniversary. We are happy to be part of this success story.



Helmut Gaugitsch
Head of Scientific Management Biodiversity at the Environment Agency Austria

Congratulations on a decade of great cooperation and achievements. BIMAL has been a member of Donau Soja since its founding and is one of the first companies in the region with non-GMO certification. We are proud of what we have all achieved so far.



Nataša Pucar
DS Advisory Board



Congratulations on 10 years of successful work towards GMO-free production and the consumption of soy in Europe. Donau Soja has done much to strengthen domestic protein supply. We wish you continued success and vigour in pursuing these goals.



Stephan Arens
Managing Director of the
Union zur Förderung von
Oel- und Proteinpflanzen
e.V. (UFOP)

As a member from the very beginning, I have always supported the vision of a sustainable and secure European protein supply. I am delighted to see how the mission is still being successfully implemented with the involvement of all stakeholders.



Ernst Ternon
Auditor Verein Donau Soja

Congratulations on your anniversary! The soybean is on the rise because Donau Soja has worked so hard to make it so. Keep up the good work, and we will see this once exotic plant become a familiar face in Europe's fields in the future.



Dr. Volker Hahn
State Plant Breeding Institute,
University of Hohenheim

Non-GMO soy from Danube Soja helps protecting the climate, supporting soil life, and slowing down the destruction of highly biodiverse habitats and pristine rainforests. It is a crucial contribution to our entire value chain, as well as helping to reduce our import dependencies.



Leonore Gewessler, BA
Austrian Federal Minister of
Climate Action, Environment,
Energy, Mobility,
Innovation and Technology

Different skills and competences, passionate and open-minded people looking towards the future. In these 10 years, Donau Soja has become a unique opportunity for growth for all those involved in the soybean and vegetal protein business. Congratulations, and thank you.



Piero Ciriani
Soia Italia Chairman, Sipcam
Italia Seed Business Manager

It is mainly thanks to the initiative of the Donau Soja organisation that the proportion of feed soy of European origin imported into Switzerland has risen from 20% to its current level of 80%. Thank you for this sustainable development, and congratulations on your 10th anniversary.



Fortunat Schmid
Head of Quality Management
and Sites at the fenaco
cooperative for grains,
oilseeds and feedstuffs

It is thanks to the Donau Soja initiative that the small country of Austria has become a driving force in European soybean cultivation. Donau Soja is thus a key pioneer for sustainable farming from field to plate. Thanks to all the protagonists who contributed to this achievement.



DI Dr. Johann Schledereder
Managing Director of the
Austrian Pork Farmers Union,
Donau Soja Board

Donau Soja products are world leaders in sustainability. Soybean oil and soy meal made from Danube region soybeans generate less than half of the carbon footprint than rape seed oil or soy meal from South America. I am honoured to be part of this organisation.



Josef Willim
BAG Oil Mill, Donau Soja
Board

THE INTERNATIONAL COOPERATIONS OF DONAU SOJA

Donau Soja has a great vision: a sustainable, safe, European protein supply. The successful achievement is only possible with strong and comprehensive partnerships on national and international levels. In this context, the association directs its efforts towards forming strong alliances and cooperating with like-minded initiatives.

EUROPEAN NATIONAL SOYA INITIATIVES (ENSI)



Across Europe, national soya initiatives have been developed by a range of committed people to support soya users (retailers, brands, feed industry, processors, traders, and others) in their transition to sustainable soya supply chains. Whilst some of these initiatives have been established and worked towards this goal for several years (e. g., in the Netherlands, Switzerland, and Norway) others such as those in Denmark and the UK are relatively recent.

Since 2019, convenors of some of these national soya initiatives, including Donau Soja, have informally met under the umbrella of the Amsterdam Declaration Partnership to discuss how best to support their members, and how they may better collaborate to create a more meaningful

impact. This has culminated in the signing of a joint statement of support for sustainable soya with a shared goal: 100% of our (countries') soya consumption is produced according to the law and in a way that protects forests and valuable native vegetation (deforestation and conversion free).

In 2021, the European National Soya Initiatives (ENSI) platform was formally established to allow its members (and invited stakeholders) to identify issues of common interest in the field of sustainability, international trade, and European affairs where these relate directly to soya production, and to exchange good practices between the national soya initiatives. The ENSI secretariat is facilitated by the external service provider Schuttelaar & Partners.

Further information is available at https://ad-partnership.org/wp-content/uploads/2020/05/European-National-Soya-Initiatives-State-ment_FINAL.pdf





THE COLLABORATIVE SOY INITIATIVE (CSI)



The Collaborative Soy Initiative (CSI) was launched in 2019 to build a neutral, global, credible, transparent, and inclusive soya community. The collaboration framework comprises different 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 promote synergies between stakeholders.

In August 2019, Donau Soja joined the CSI as a Steering Group Member. In 2021, the CSI was established as a Dutch foundation and Susanne Fromwald joined its

Board of Directors on behalf of Donau Soja. On 21 October 2021, CSI and Donau Soja organised a webinar on "European soy – facts and trends in European production and consumption" which focused on European soya and especially Ukraine as target country. During the presentations, Volodymyr Pugachov (Donau Soja Kyiv) shared valuable insights into Ukraine's potential as a soya producer and Protein Partnerships as a tool for increasing sustainable non-GM production in Europe, for Europe. In May 2022 he and Susanne Fromwald (Donau Soja) presented in the CSI-webinar "Sustainable soy sourcing in Europe in the light of the war in Ukraine", the related impacts on logistics, availability, and prices.

Further information is available at <https://thecollaborativesoyinitiative.info/>

EUROPEAN NON-GMO INDUSTRY ASSOCIATION (ENGA)



The European Non-GMO Industry Association (ENGA) is the voice of the Non-GM food and feed sector at EU level. ENGA highlights and represents the business interests of national Non-GM industries and economic operators (production, processing, marketing, retail, certification, labelling) vis-à-vis the political bodies of the EU. Non-GM production has developed into an established and

trusted pan-European quality standard and has become an important European market factor. ENGA advocates for legislation and policies to secure and expand the successful and wide-ranging Non-GM production in the long term. ENGA supports its members in meeting consumer demand for Non-GM agriculture and Non-GM food products by promoting food that excludes GM plants in production chains. Susanne Fromwald joined ENGA as a Board Member on behalf of Donau Soja in 2020.

Further information is available at <https://www.enga.org/>

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 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 meeting Donau Soja's Standards. Members get free consultation on how to comply 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 as a result of using 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.



Kogelmann Robert | Geflügelhof Aigner KG | Höllerl's Freilandeier | Enengel Franz | Sandmayr Alfred | SC Agrotirave SRL | Lambrecht Josef | WWF Deutschland | Mitterer GmbH | SC Transapicola | Saatbau Polska Sp.z.o.o. | Beinhundner Klaus | Astrid & Franz-Josef Telohé 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 | Mlynshche LLC | Grim Management Services B.V. | Tauss GmbH | Bravo Agro Protein | CLI-Ins EURL | Lidl Stiftung | Bentia Dana | RAGT Saaten Österreich GmbH | Aldi South Group / Hofer KG | Landwirtschaft Eierhof-Krenn | Gauhs Ernst | Krumhuber Christian | terre-rhin-durable - Jörg Schaffer | SC Agrotirave SRL | Ernst Pretzl | Agremo Ltd. | Raiffeisen Kraftfuttermittelwerk Dörpen GmbH | Haneberg & Leusing GmbH & Co. KG | KS Agrar GmbH | Forschungsinstitut Futtermitteltechnik der IFF e.V. | Vimexim International GmbH | Soyconsultant | Ojah B.V. | Cizeron Bio SA | Haziak SAS | Martin Leeb | SC ECO FRUCT SRL | Dambauer Karl und Wiesmair Silvia | Columbus Frischei GmbH | La Sanfermese SpA

BOOSTING SOYBEAN PRODUCTION THROUGH INNOVATION

The soybean grows well in many parts of Europe, as it does in parts of the world such as the USA or South America where it is a major crop. It also brings advantages for the wider cropping system in Europe by reducing dependence on nitrogen fertilisers and countering the build-up of diseases, pests and weeds in cereal-based crop rotations ('break-crop effect'). However, as other crops, particularly cereals, also grow well in Europe, soybean production must be technically efficient if it is to be competitive.

Cultivars (varieties) suitable for the growing conditions and market requirements are key to efficiency. As with all other major crops, plant breeding plays a huge role. However, as the soybean is a self-pollinated, in-bred crop species, genetic improvements are easily copied, making it difficult for breeders to obtain adequate returns for their efforts from the seed market. Consequently, co-operation between breeders and collaboration within the research community is essential if the costs of crop improvement are to be shared fairly between breeders, growers, and society as a whole.

Compared with other major crops, in recent decades the soybean has received little attention from public research investors and organisations in Europe. Calls from farmers and processors in Central Europe became louder ten years ago: Soybean cultivars were not well adapted to the climate in Europe and crop quality varied considerably, constraining the use of soya in the food and feed industries. A lack of know-how about crop management often resulted in unsatisfying yields. More agricultural know-how and innovation was needed.

From its earliest days, a key aspect of Donau Soja's work has been to support this research. As an independent, multi-stakeholder organisation with a clear overview of food and feed value chains in Europe, Donau Soja is well positioned to promote collaboration and networking between breeders and research organisations. A major milestone was a memorandum of understanding between Donau Soja and the Chinese Academy of Agricultural Sciences signed in 2015, establishing a research collaboration. The resulting Haberlandt Scholarship was made possible thanks to the Ministries of Agriculture in Baden-Württemberg and Bavaria, Agroscope in Switzerland, and Saatgut Austria. We are undertaking a large-scale experiment based on the exchange of 78 cultivars each from Chinese and European breeding programmes. To our knowledge, this is the largest, and rare, official

transfer of advanced breeding material between Europe and China.

After ten years, we are making progress thanks to the efforts of scientists and breeders. Genetic improvement is evident in the number of cultivars registered per year. In Austria, for example, the number of annual cultivar registrations increased from around two between 2000 and 2010 to seven between 2011 and 2020. Breeders registered 16 new cultivars in 2019. The common catalogue of varieties of agricultural plant species shows a similar increase in the number of new registrations at European level. This positive signal reveals that breeders see market opportunities for better cultivars. They are investing in their breeding programmes to create cultivars which can compete against major crops such as wheat, corn, sunflower and rapeseed.

For Donau Soja, soybean innovation means more than genetic improvement. The field conditions must also be right. For that reason, Donau Soja also supports research and know-how sharing to advance agronomic skills and achieve higher yields, while simultaneously reducing the environmental footprint of production. Linking research to agronomic practice requires an approach tailored to local conditions. This has been achieved through field days and on-farm training in Austria, Bosnia & Herzegovina, Croatia, Moldova, the Netherlands, Poland, Romania, Serbia, and Ukraine to broaden understanding of soybean cultivation. Our organisation takes a flexible approach, supporting everything from large public events to highly focused initiatives, targeted regional beacons, and organised international study visits or special scientific trials.

The knowledge we generate flows across borders, making us very proud of the role we play in the Legumes Translated consortium funded by the European Union which has enabled us to greatly enhance our support for farmers. With a strong international team across Europe, Donau Soja leads the development of the Legume Hub¹, a community driven, European-wide knowledge platform for the production and use of legumes. Launched in 2021, the Legume Hub has now become an important part of the work of Donau Soja. This will increase in the coming years as Donau Soja broadens its focus from purely soya to include other legumes.

¹ <https://www.legumehub.eu>



DONAU SOJA

NEAR-INFRARED ANALYSIS FOR SOYBEANS AND SOYA FEED



Near-infrared technology:
Fast, reliable and low-cost

Made in Germany.

Applicable products

- + Soya cake, soymeal, corn and more
- + Soybeans, raw and heat treated

For

- + Quality control
- + Optimal processing
- + Feed-ration optimisation



10 times less expensive
than conventional analysis.

Results within 48h
upon arrival at the lab in Germany.

Packages

Soybean Basic	Basic: crude protein, oil, fibre, energy etc.	from € 30*
Soybean Amino	16 Amino acids: Methionine, Cystine, Lysine, etc.	from € 55*
Soybean Basic + Amino	Combination package of: +Soybean Basic (row 1) +Soybean Amino (row 2)	from € 85*
Soya feed Basic	Basic + Processing parameters: Trypsin-inhibitor activity, digestible lysine, etc.	from € 73*
Soya feed +Opti	Basic + Processing parameters + 16 Amino acids	from € 98*

*net prices per sample; discounts included.
Charges for sample processing and administration are included in price.
Shipping costs are not covered by the package price.

Discounted prices

for Donau Soja Members and orders in bulks.



Contact

Donau Soja
Wiesingerstrasse 6/14
1010 Vienna, Austria
+43 1/512 17 4421
innovation@donausoja.org

A DECADE OF DONAU SOJA COMMUNICATION, EVENTS AND MARKETING

Franko Petri

Donau Soja began its communication work by discussing soya cultivation with farmers. These shared experiences led to the initial founding event, a high-level symposium in Vienna in 2012. At that time, the young organisation received PR support from Florian Faber, Chairman of Austria's "ARGE Gentechnik" association, who is still actively involved in Donau Soja Steering Committee (Presidium) today. In addition to numerous ministers from CEE countries, the former EU Commissioner for Agriculture, Franz Fischler, and the renowned biologist, Christine von Weizsäcker, were also present.

In the years that followed, Donau Soja's great strength always lay in organising a multitude of congresses, symposia, field days, annual assemblies, networking events and countless high-level meetings. At these events, Donau Soja pursued the goal of bringing together all participants in the value chain, from soya producers to processors, traders, retailers, scientists, politicians and consumers. From the beginning, the core message was that Europe needs a protein transition that must be regional, GMO-free and sustainable in order to ensure Europe's protein supply.

and communication activities were extended to Serbia, Croatia and Bosnia and Herzegovina.

From 2015 onwards, the number of public events increased and Donau Soja established itself as the leading European organisation for the development of a European Protein Strategy. This also marked the start of activities in Ukraine, Romania and Moldova. The entry of many members was accompanied by media work in these countries. Journalists were invited to field days in order to promote the European initiative. Branches and representative offices in several countries also provided the media with the core messages of Donau Soja.

2016 was the first participation of Donau Soja at the EuroTier fair in Hannover with a lot of press work in the DACH area. At the same time, our quality standards were also further developed and publicised, especially in agricultural media. In 2017, the Strategic Partnership with the Austrian Development Agency (ADA) for non-GM and organic soya in Ukraine, Serbia, Moldova and Bosnia and Herzegovina was established. The long-term cooperation was extended last year until 2023.



From the very start, Donau Soja's many communication and marketing successes drove the organisation's goals. From 2013, only Donau Soja certified feed was used for Austria's laying hens. Today, millions of consumers see our green-blue logo on their egg cartons in thousands of supermarkets. 2013 also marked the signing of the Donau Soja Declaration, an event publicised by the European press. The office in Novi Sad was opened in 2014,

The Europe Soya Declaration in 2018 aimed to promote the cultivation of soya and other legumes in European countries to reach the UN Sustainable Development Goals (SDGs). In 2019, a tour across Austria was organised, honouring Friedrich Haberlandt, the Austrian soya pioneer from the imperial era, for his hundreds of soya plantations in the provinces of the Austro-Hungarian Monarchy. In that year, Donau Soja also communicated



almost 110,000 tonnes of CO₂ reduced annually by feeding laying hens in Austria with Donau Soja. The carbon footprint/CO₂ calculations became an important milestone for communicating the work of Donau Soja. Several press conferences were organised in Germany and Austria 2020 – 2022.

In 2020 an organisational change was approved by the Donau Soja board. A Programme Director of Marketing and Communication as well as an international communications team were established. In Vienna, a new Head of Communication for the DACH team improved the organisation's press work and a press officer was employed. Media communication became a new priority. A professional media monitoring system with Austrian Press Agency (APA), which covers Austria, Germany and Switzerland, was introduced. Donau Soja is now also able to send tailored press information to all relevant DACH media via the APA media database. These new tools led to hundreds of new media clippings in special interest/opinion leader magazines but also in broad public media in many countries annually.

Due to several lockdowns because of Covid, events had to be organised as webinars or hybrid events since 2020, when a new marketing and event organiser was employed. The Donauboerse and the General Assembly in Vienna in 2021 were the first physical events possible after a longer break. We have now a pool of new translators, a native proof-reader and every edition of the Donau Soja Market Report gets professionally edited. The focus in media work in 2021 was on joint press releases with ADA, Greenpeace and WWF, on carbon footprint, aquaculture in Norway, protein partnerships, the rising prices for feed, the new protein strategy in Austria and many



other topics.

In 2022, the year with our 10th anniversary, the biggest challenge is a stable communication due to the war in the Ukraine which affects Donau Soja and its work directly. We had to fight against attempts to lower standards in agriculture in the EU and to secure availability of Donau Soja both for food and feed. The anniversary year will be accompanied with an array of media work in Austria but also in all our partner countries. In this difficult year we also had a number of communication achievements: the new website with an implemented partner's database was launched in German and English in April; a new Wikipedia site in German went online; this Anniversary report was produced; events like the agricultural fairs in Prague or a networking event in Frankfurt reached a wide audience in German-speaking and international media. In the Ukraine we participated in the Agro Animal Show and Soja Discussion Clubs took place even after the Russian invasion. In Serbia we organised Field Days and promoted them widely throughout the country. So, it goes on as it all started: Donau Soja is continuing an intense dialog with our partners, members and farmers - on a Field Day in the Serbian Lugovo as well as during our 10 years anniversary celebrations in Vienna in September 2022. This big 2-days anniversary event including a Food Day in the Hotel Intercontinental in Vienna will be organised with interesting speakers from many countries. We have walked together 10 years towards a European Protein Transition and there are still many years to go. Communication will be a crucial part to achieve our goals.

Record soy production forecast for Europe, planting in Ukraine exceeds expectations

By Jane Byrne

29-May-2022 - Last updated on 29-May-2022 at 09:11 GMT



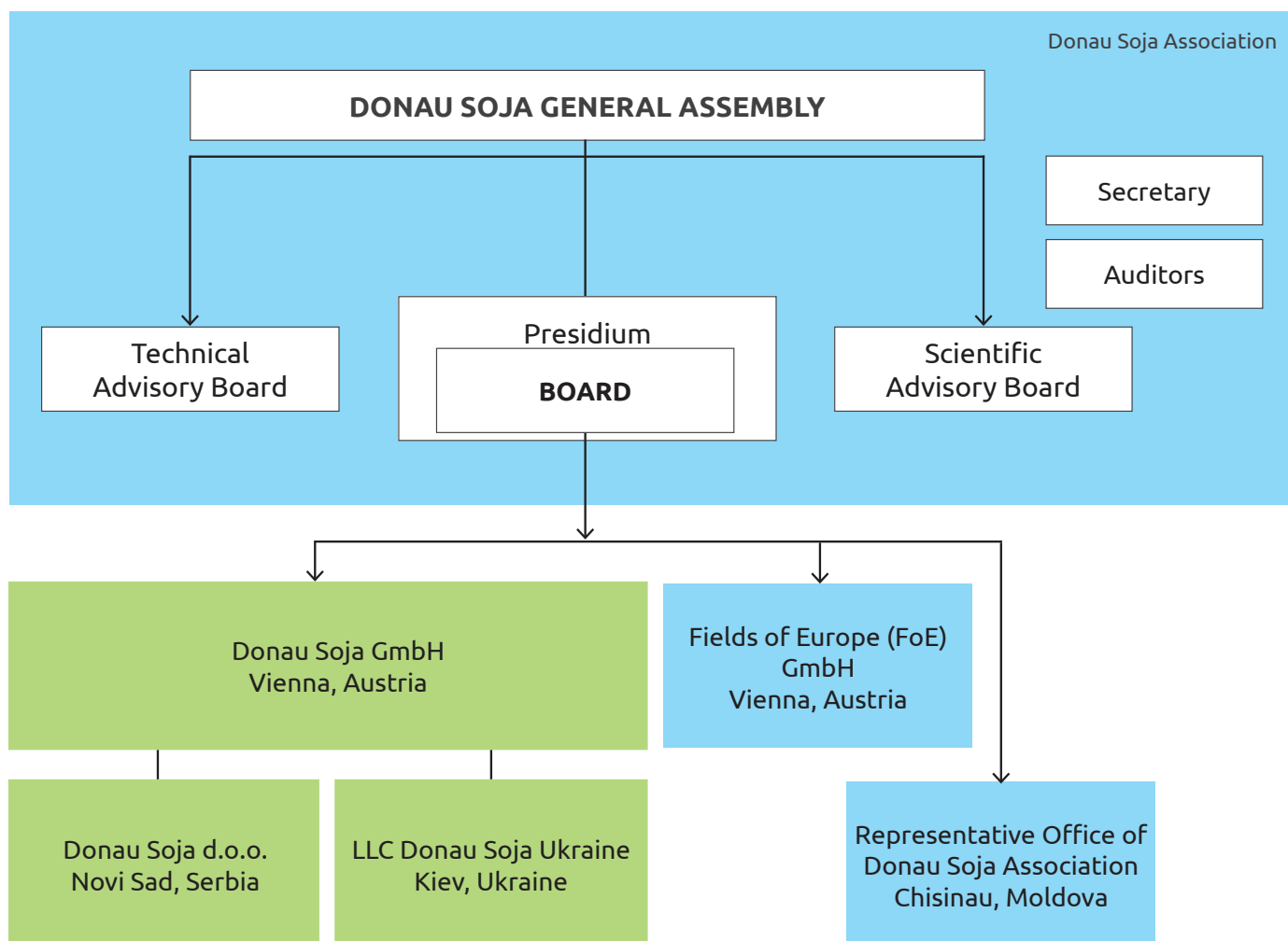
RELATED TAGS: soybeans, donau soja, Ukraine

Europe is aiming for a record year in soy, 4.3% higher than 2021, according to industry figures.

This year's total soy area is predicted to grow to 4.5 million hectares, finds the latest market report from Donau Soja.

Soy area in the EU-27 is predicted to expand by 12% to a record 1.09 million hectares, said the organization.

ORGANISATION STRUCTURE



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DONAU SOJA PRESIDIUM

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Ostap Palchevskyy	Agrarian System Technologies (UA)



Initiatives for sustainable European soybean supply are more important than ever. Donau Soja's achievements in this field are unparalleled. They have managed not only to increase domestic production, but also to strengthen the whole supply chain and related research.



Johann Vollmann

Associate Professor at the University of Natural Resources and Life Sciences, Vienna (BOKU)

For the LfL, the Donau Soja anniversary represents 10 years of intensive cooperation in soy research and consulting on behalf of our farmers. Through our common goals we are helping to implement the European Protein Strategy and secure the GMO-free status of soy feed in Bavaria.



Dr. Joachim Eder

Legume Research and Breeding at the Bavarian State Research Center for Agriculture

Ten years ago, we started with a great vision. Responsible for a strong agricultural sector in Upper Austria at the time, the idea of a protein transition seemed remote but also vital. Today, thanks to Donau Soja, we are on track towards a sustainable, European protein supply.



Max Hiegelsberger

President of the Regional Parliament and former Secretary of State for Agriculture in Upper Austria

"See the good that lies so near!" is a saying which perfectly reflects the founding idea of Donau Soja. It is our duty to bolster protein production in Europe, not least because of security of supply but also to fight global warming.



Johann Seitingner

Regional Minister for Agriculture and Forestry (Land Steiermark)

Europe's food supply is dependent on imports, not only for energy and fertilisers, but also feed made from soybeans. Donau Soja's historic achievement is to raise awareness of the need for change, and to establish alternatives within Europe. We offer our sincerest congratulations.



Karl & Elisabeth Fischer
Soja aus Österreich

Happy 10th anniversary, dear Donau Soja Association. We have been part of your life's journey with the GIZ project „GVO-freie Soja aus dem Donaauraum“ which ran from 2014 to 2017. Wishing you all the best for the future.



Rosmarie Metz

Gesellschaft für Internationale Zusammenarbeit (GIZ GmbH)

The idea of Donau Soja has developed as persistently as the power of the Danube River. Today, after 10 years, we can look back with pride on the many successes. Congratulations to the entire team for this unique success story.



Josef Fraundorfer

Managing Director Saatbau Linz



Partner der Agrarwirtschaft

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A strong partner

The foundation and continuous expansion of Donau Soja is a great success. It established the basic principles and the understanding that sustainably produced non-GMO soya for Switzerland, as a pioneer in the field of certified non-GMO soya, does not primarily have to originate from overseas. Today, fenaco imports over 80% of its soya meal from European sources, a success that has been made possible in part by the Donau Soja initiative.

Consumers increasingly expect their protein supply to be plant-based and of local origin. Donau Soja can and must continue to be engaged here, so that the focus remains on sustainably produced non-GMO soya from Europe – even in times of extremely volatile raw material markets and strained logistics.

The fenaco cooperative sincerely congratulates the Donau Soja association on their 10th anniversary and looks forward to the continuous good cooperation for the development of European and sustainable non-GMO protein sources.

fenaco cooperative, Grain, Oilseeds, Feedstuffs
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Wir setzen ein neues, starkes Zeichen.

Unsere Initiative »Fair zum Tier« hat ein Ziel: mit dem künftig größten Tierwohl-Sortiment Österreichs die Lebens- und Haltungsbedingungen heimischer Tiere noch weiter zu verbessern. Mit Maßnahmen, die weit über gesetzliche Standards hinausgehen.

Tanja Dietrich-Hübner,
Leitung BILLA Nachhaltigkeit



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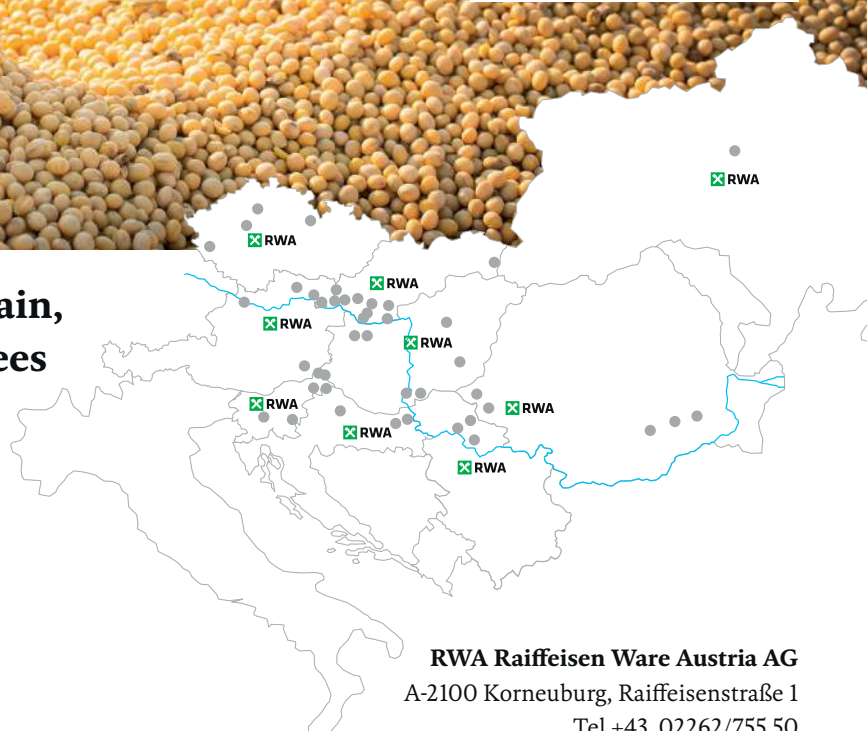
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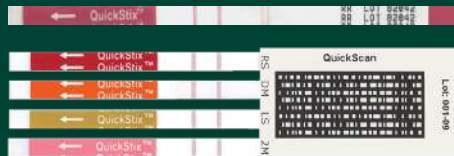


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The sustainable cultivation and use of regionally produced feed, especially soy, will become increasingly important. Donau Soja is able to meet these challenges as it is active along entire value chains. I congratulate the organisation on its 10th anniversary and wish it every success for the future.



Dr. Reinhard Puntigam
Scientific Advisory Board DS



I would like to express my warmest congratulations on 10 years of Donau Soja. The organisation has played a leading role in shaping the protein transition and the development of soy cultivation and sales in Europe. I wish you continued success with this outstanding work.



Peter Hauk MdL
State Minister of Food,
Rural Affairs and Consumer
Protection



Soybean cultivation is becoming increasingly important in Europe. Donau Soja has succeeded in networking the various stakeholders and integrating regional added value, from cultivation to consumption. This also represents an active contribution to climate protection.



Michaela Kaniber
Bavarian Minister of Food,
Agriculture and Forestry



I would like to express my heartfelt congratulations to Donau Soja on its 10th anniversary. Developments in this field have made great progress, and I am particularly pleased that the oil mill in Güssing is a central part of the Donau Soja network. All the best for the future!



Verena Dunst
President of the State Parliament of Burgenland

Congratulations to Donau Soja for boosting non-GM soybean acreage and non-GM protein productivity in Europe. In future, Donau Soja could help coordinate European Institutes and private companies in developing diaporthe-tolerant and early ripening varieties.



Patrice Jeanson
Lidea France, DS Scientific
Advisory Board

Congratulations to Donau Soja on its 10th anniversary. I look back with pleasure on years of good cooperation and jointly achieved goals. Since 2014, the conversion of Austrian laying hen feed to Donau Soja has strengthened regional cycles in Austria and throughout Europe.



Michael Wurzer
CEO Zentrale Arbeitsge-
meinschaft der Österreichi-
schen Geflügelwirtschaft
(ZAG)

Thanks to Donau Soja, the cultivation of soybeans in Austria has doubled within 10 years – with disproportionate growth of the organic share and an exemplary effect for the whole of Europe. We congratulate you on your anniversary and on this impressive achievement.



Andreas Steidl
CEO of Ja! Natürlich, REWE

Just as the Danube is one of the lifelines of a Europe that is growing together, Donau Soja creates cross-border networks, far beyond the cultivation of soy. I am proud to have accompanied Donau Soja right from the beginning, and I look forward to many more years of successful cooperation.



Amos Ramsauer
Agriprotein

It hasn't always been easy, but the result of the hard work is now visible to everybody. Donau Soja has given me the opportunity to widen my network in the soya business. I feel deep gratitude for what Donau Soja has done for me and express my heartfelt wishes on its 10th anniversary.



Daniele Marcomin
CEO Agriholism

Donau Soja helps producers of soy-based protein like Alfa Bio to receive updates on innovations and standards. We believe in soy as the most valuable plant-based protein. That makes Donau Soja's advocacy and umbrella role crucial to us.



Jakub Lunter
Business Development
Director at Alfa Bio

As an integrator of the soybean supply chain, Donau Soja has made an incredible effort to build bridges of understanding and cooperation between research, businesses, and governments in Europe. Congratulations to the Donau Soja team and all its members on its 10th anniversary.



Nataliia Gordiichuk
Owner of Agritema LLC,
Ukraine

We are proud to have been a member of Donau Soja from the very start. This has resulted in a major protein partnership and the first products with segregated commodity streams which promote sustainable soy. We sincerely congratulate Donau Soja and look forward to many more years of successful co-operation.



Katrin Matheis
Team Leader CSR at Lidl, DS
Presidium

My warmest congratulations to Matthias Krön and Donau Soja on its 10th anniversary. We wish to continue our successful cooperation with Donau Soja, sustaining best practice and technology transfer along the entire value chain, for the benefit of farmers, society and consumers.



Viorel Gherciu
Minister of Agriculture and Food Industry of Moldova

In 10 years, Donau Soja has strongly promoted and developed soybeans in Europe. Now Donau Soja's next challenge is to increase the use of certified seeds to boost genetic progress, yield, supply security, traceability, as well as sustainability & crop competitiveness.



François Paybou
Soybean Market & Technical Manager at Lidea Seeds

Donau Soja as a concept has stimulated a lot of momentum in Austrian agriculture, and further abroad. The open flank represented by imported GMO feed from overseas has been proactively addressed and reduced.



Thomas Resl
Director of Federal Institute of Agricultural Economics, Rural and Mountain Research

In the 10 years of its existence, Donau Soja has significantly contributed to agricultural quality, regionality, traceability and transparency. Donau Soja has also proven to be a strong impulse for non-GMO production – a true change maker for agriculture and food production.



Florian Faber
Managing Director ARGE Gentechnik-frei

Donau Soja has been a remarkable development. Its vision and mission statement are convincing, it has a highly motivated team and is led by a visionary chairman. Congratulations on your 10th anniversary and I wish Donau Soja, its team and its partners, continued success.



Andră Rupprechter
Director for Agriculture in the General Secretariat of the Council of the EU

Being ahead of our times is not always a comfortable position, but it is the duty of leaders of the business and scientific communities to be so. Donau Soja always was, and remains, ahead of its time. This is its great service to resilient and sustainable development in Europe.



Donal Murphy-Bokern
Independent scientist and advisor to Donau Soja

Better and more sustainable consumption depends on being aware of how different ingredients in food products are produced, so that we can improve climate, biodiversity, and land use. Donau Soja is an important player when it comes to creating a sustainable future for Europe and elsewhere.



Carsten Lentz Storm
Svane Shipping, Donau Soja Board

The founding of Donau Soja was Europe's essential response to the increasing genetic contamination of this valuable protein crop. Matthias Krön courageously initiated this important and necessary movement. We are happy to continue to actively support and accompany Donau Soja on its path.



Rudolf Bühler
Founder and Chairman of the Bäuerliche Erzeugergemeinschaft Schwäbisch Hall

2012



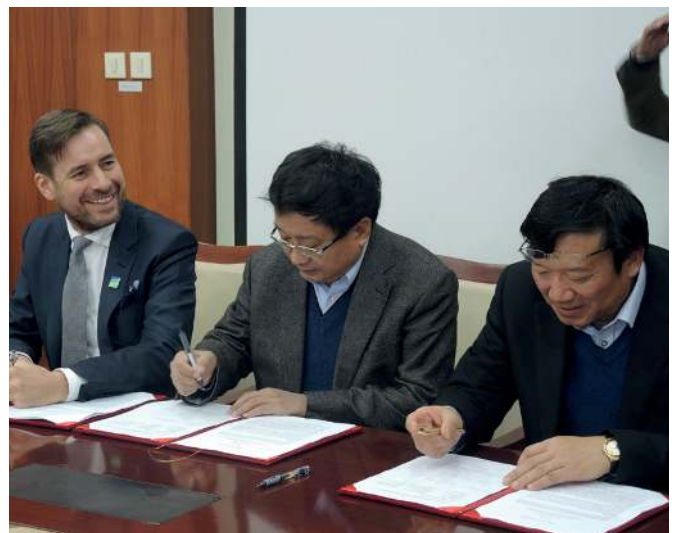
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2014



2015



2016



2017



2018



2019



2020



2021



2022

