

European Soya 2022 – growing from strength to strength

Susanne Fromwald Senior Advisor Donau Soja & Project Manager

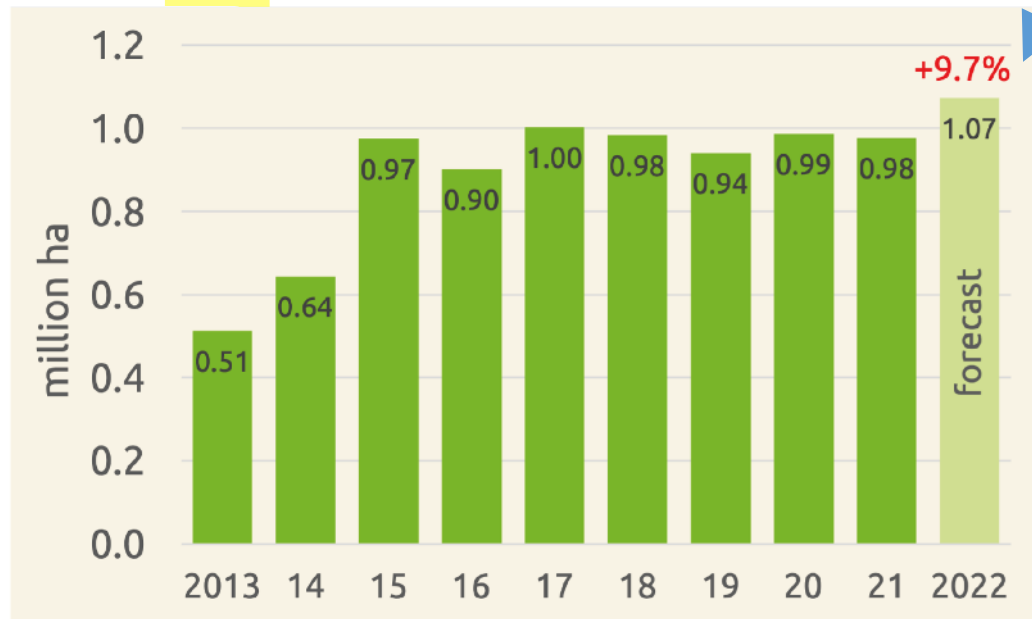
Protein Partnerships



EUROPEAN SOYA 2022 GROWING FROM STRENGTH TO STRENGTH

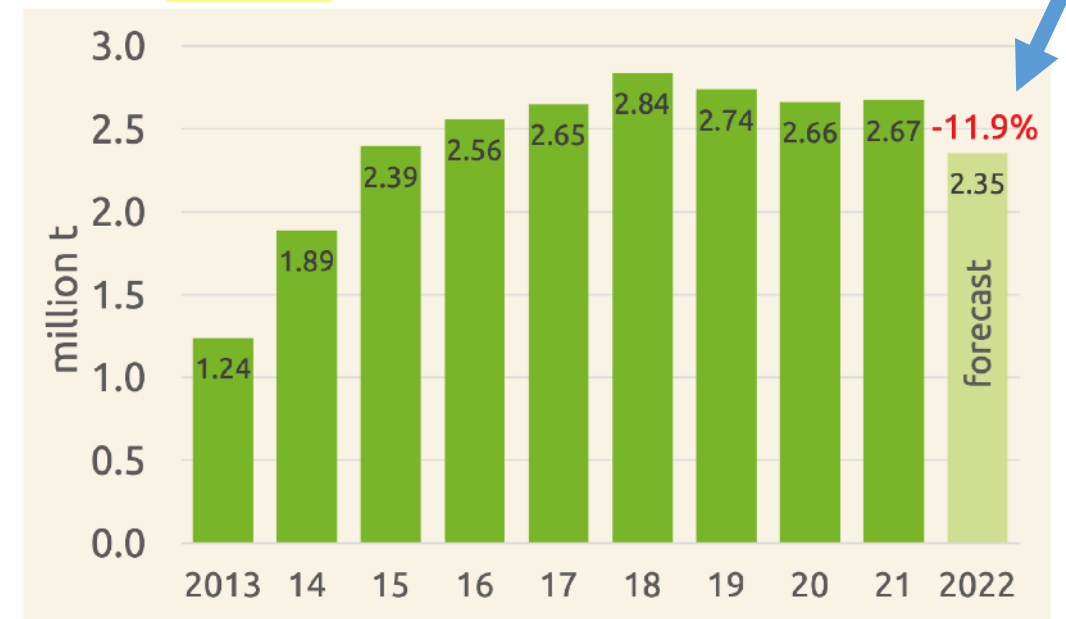
EU-27: SOYBEAN DEVELOPMENT

Soybean **area** development in EU-27 (2013 – 2022 f'cast)



Source: Donau Soja

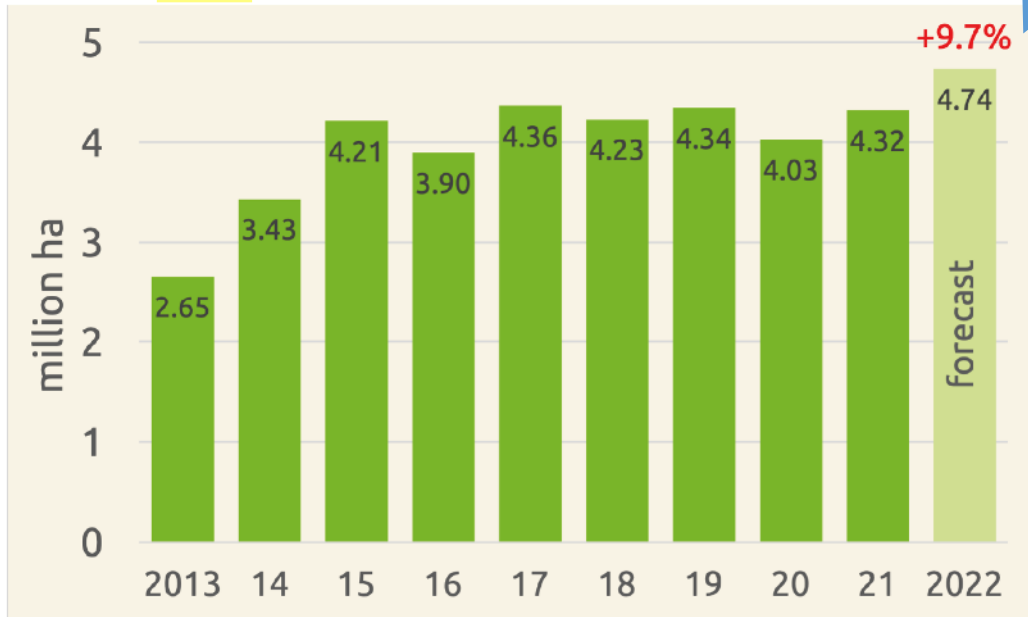
Soybean **output** development in EU-27 (2013 – 2022 f'cast)



Source: Donau Soja

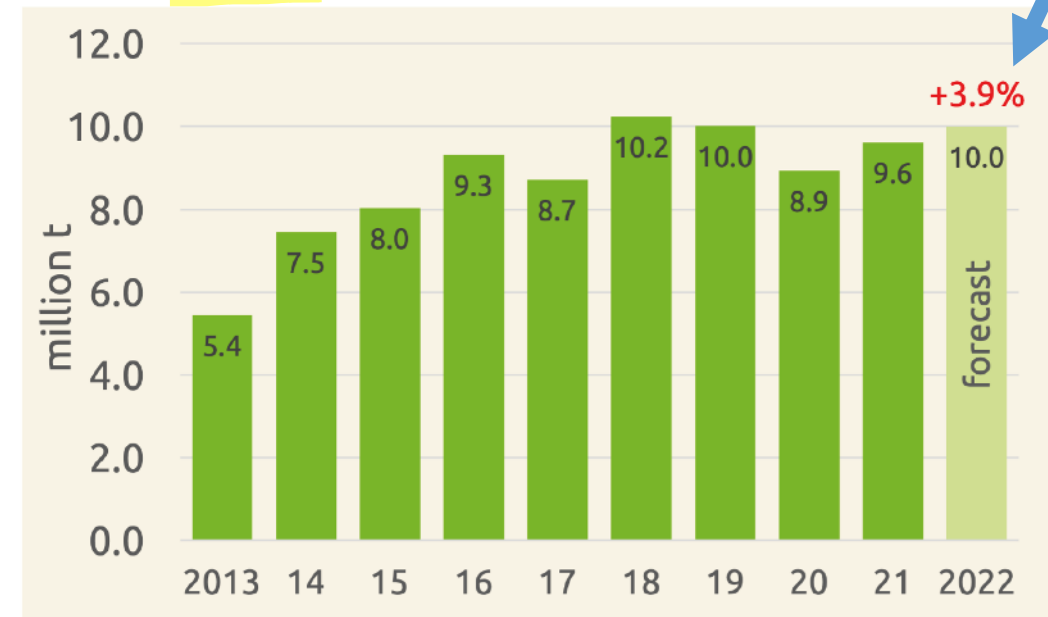
EUROPE: SOYBEAN DEVELOPMENT

Soybean **area** development in Europe (2013 – 2022 F'cast)



Source: Donau Soja

Soybean **output** development in Europe (2013 – 2022)



Source: Donau Soja

→ Non-EU countries compensate decreased volumes in EU countries

EUROPE'S SOY AREA AND HARVEST INCREASED IN 2022

Soybean **area** in selected European countries - 2021 vs 2022 estimate

	1,000 ha	2021	2022	change	
→ Russia*		1,671	1,850	+ 179	+ 10.7%
→ Ukraine		1,390	1,500	+ 110	+ 7.9%
→ Serbia		250	280	+ 30	+ 12.0%
→ Austria		77	93	+ 16	+ 21.1%
→ Croatia		85	100	+ 15	+ 17.6%
→ France		155	180	+ 25	+ 16.1%
→ Germany		34	51	+ 17	+ 49.9%
→ Hungary		63	67	+ 4	+ 7.0%
→ Italy		300	290	- 10	- 3.3%
→ Romania		149	137	- 12	- 8.1%
→ Slovakia		64	68	+ 4	+ 6.3%
Total EU-27		978	1,072	+ 95	+ 9.7%
Total Europe		4,319	4,736	+ 417	+ 9.7%

*only European Russia
Source: Donau Soia

All-time high of soya areas in Europe

Soybean **output** in selected European countries - 2021 vs 2022 forecast

#1 →

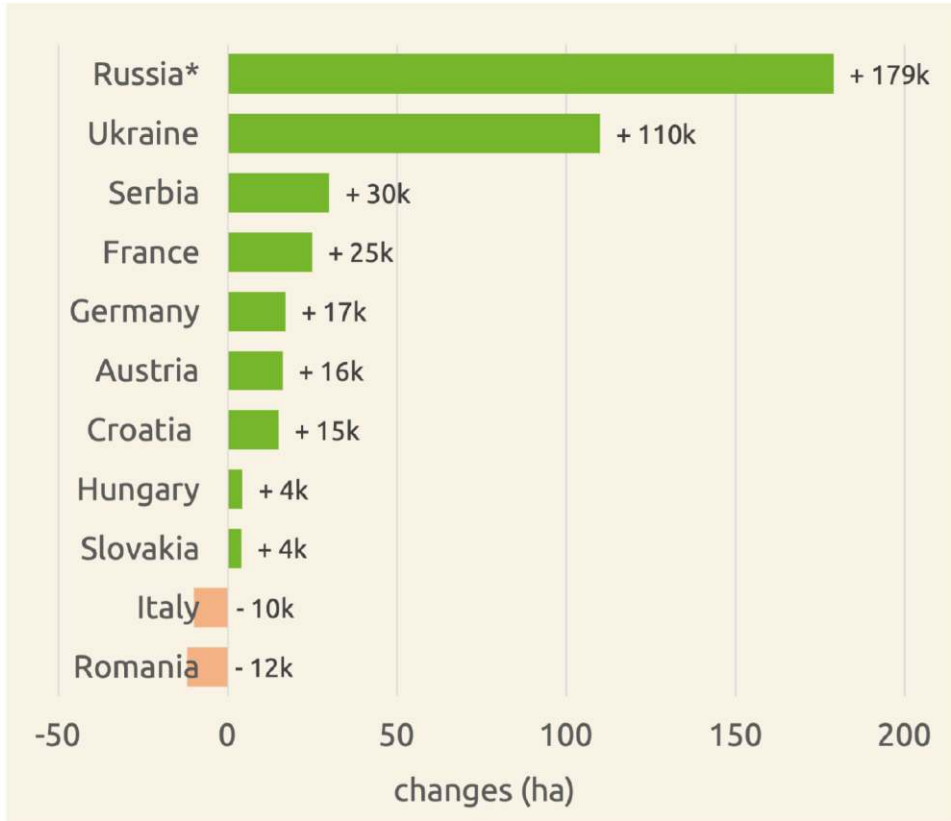
	1,000 tons	2021	2022	change	
→ Russia*		2,844	3,550	+ 707	+ 24.8%
→ Ukraine		3,490	3,600	+ 110	+ 3.2%
→ Serbia		549	440	- 109	- 19.8%
→ Austria		235	260	+ 25	+ 10.6%
→ Croatia		195	200	+ 5	+ 2.6%
→ France		455	380	- 75	- 16.5%
→ Germany		107	128	+ 21	+ 19.8%
→ Hungary		164	134	- 30	- 18.3%
→ Italy		880	610	- 270	- 30.7%
→ Romania		350	274	- 76	- 21.7%
→ Slovakia		174	160	- 14	- 8.0%
Total EU-27		2,673	2,354	- 319	- 11.9%
Total Europe		9,620	9,998	+ 378	+ 3.9%

*only European Russia
Source: Donau Soia

Drought and heat waves impact yields in EU-27 and results in smaller outputs (right)

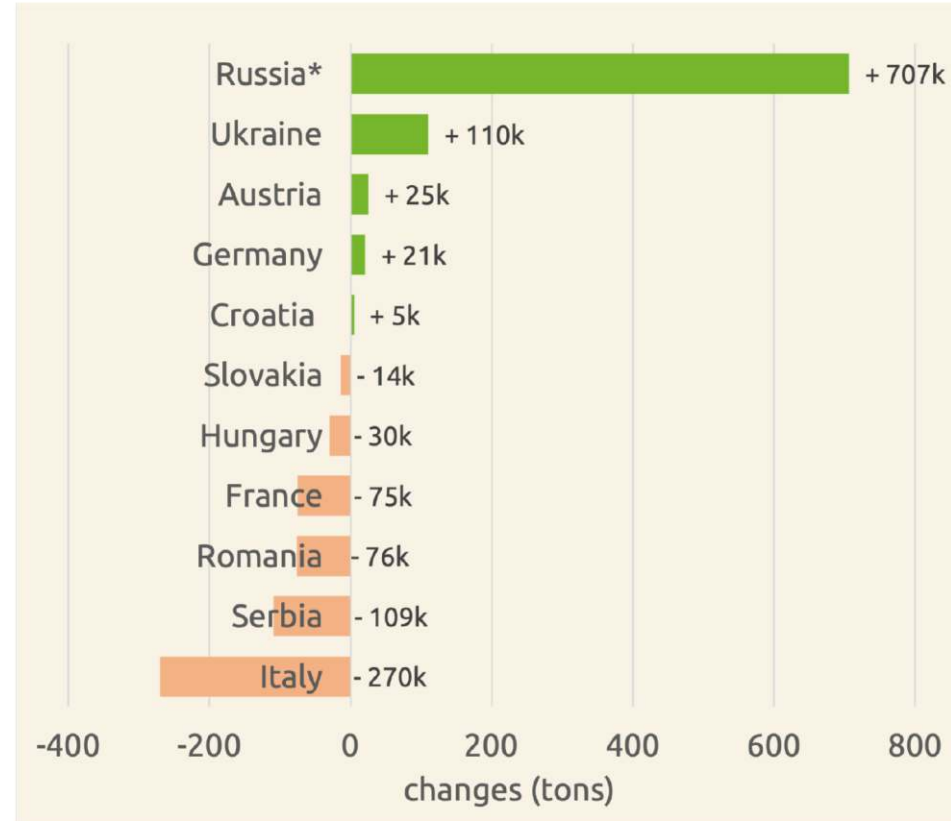
Country perspectives – winners and losers in 2022

Soybean **area** change by selected country in Europe (2022 vs 2021) in hectares



*only European Russia
Source: Donau Soja

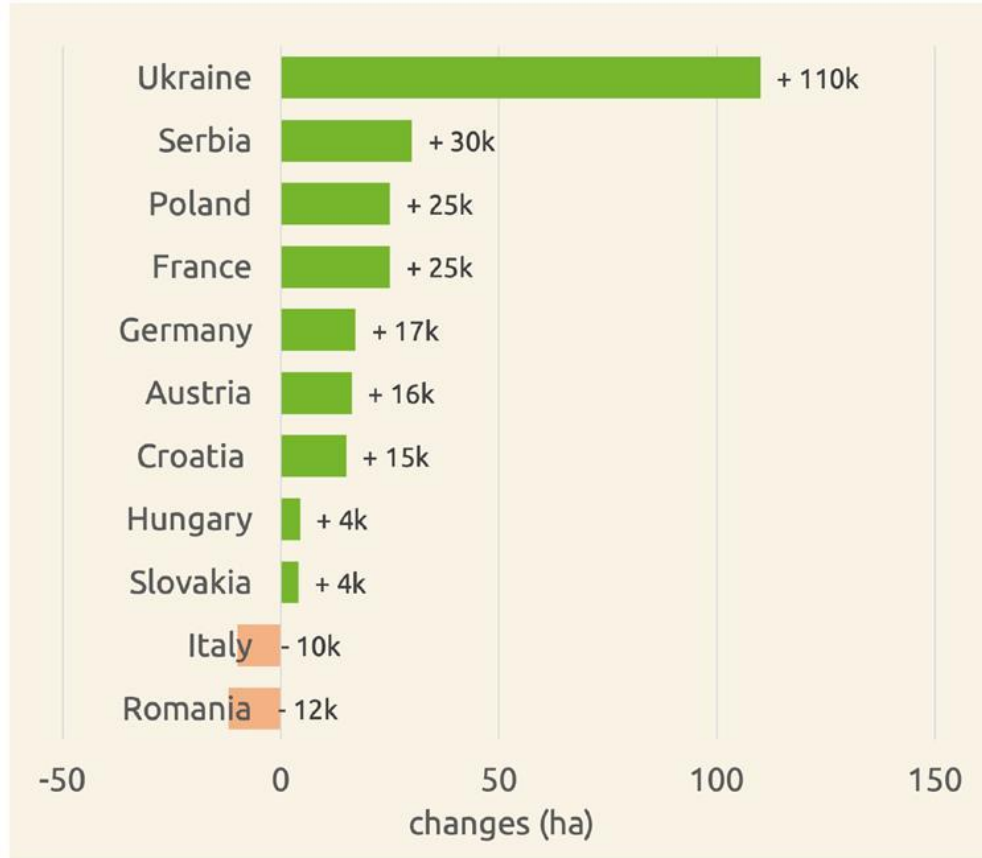
Soybean **output** change by selected country in Europe (2022 vs 2021) in tons



*only European Russia
Source: Donau Soja

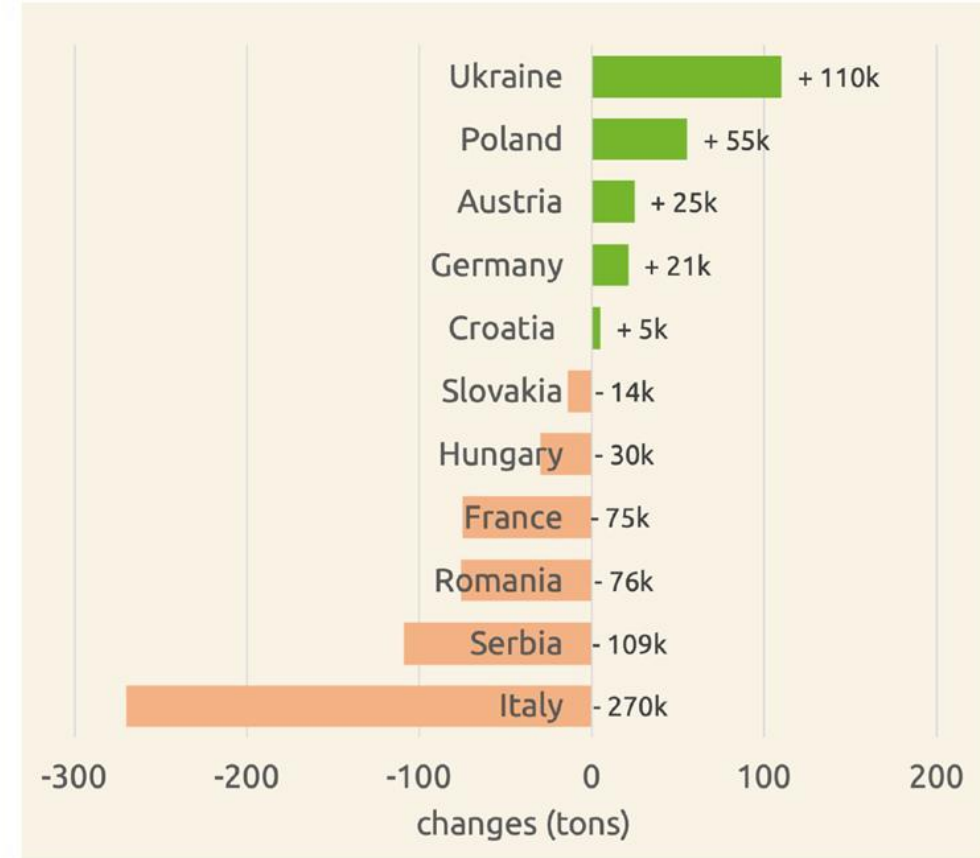
Country perspectives – winners and losers in 2022

Soybean **area** change by selected country in Europe (2022 vs 2021) in hectares



Source: Donau Soja

Soybean **output** change by selected country in Europe (2022 vs 2021) in tons



Source: Donau Soja

DONAU SOJA/EUROPE SOYA CERTIFIED SOYBEANS & PARTNERS IN 2022

 Austrian
Development
Agency



in 12 countries

= 10% of the
European soya
production

Over 10 000 farmers

Over 200 collectors
certified in 12 countries

11 crushers and 25 smaller
soya processors certified

= Donau Soja & Europe Soya volumes are sustainable, Non-GM and deforestation/
conversion-free, segregated and traceable (cut-off date 2008)

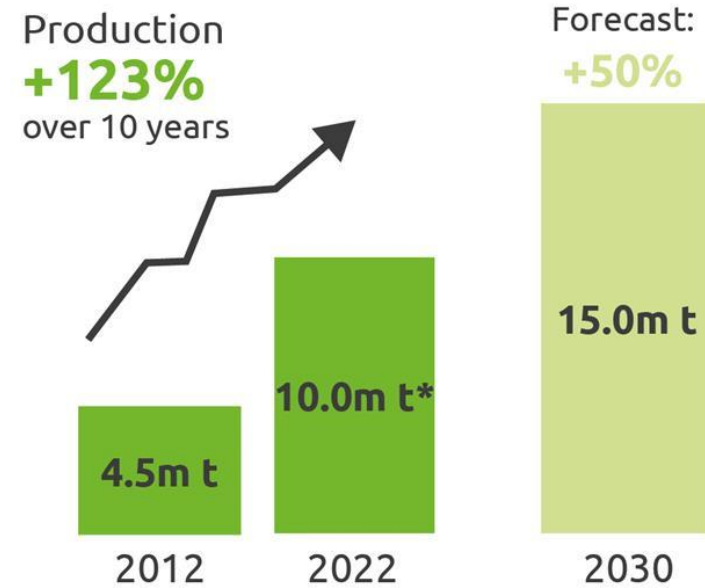
Soy on the rise in Europe (acreage/tonnes)

Soya area growth in Europe (2012 – 2030)



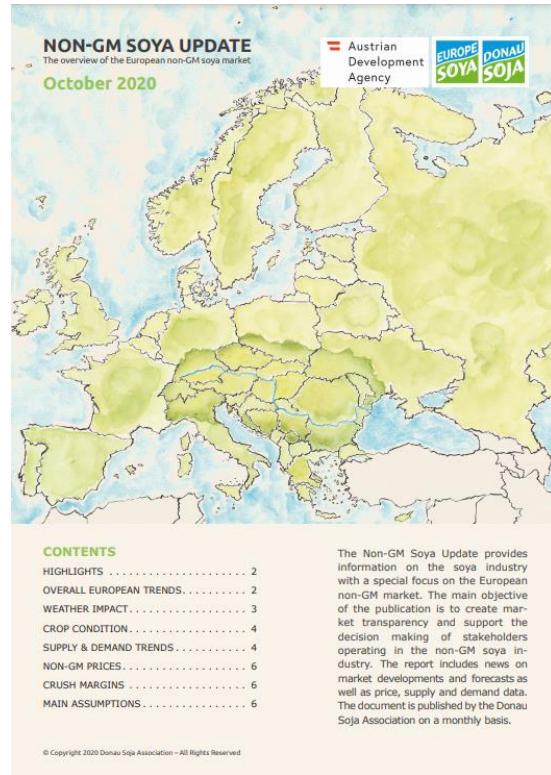
Sources: Donau Soja

Soya output growth in Europe (2012 – 2030)



*Forecast
Source: Donau Soja

Monthly Donau Soja Market Report

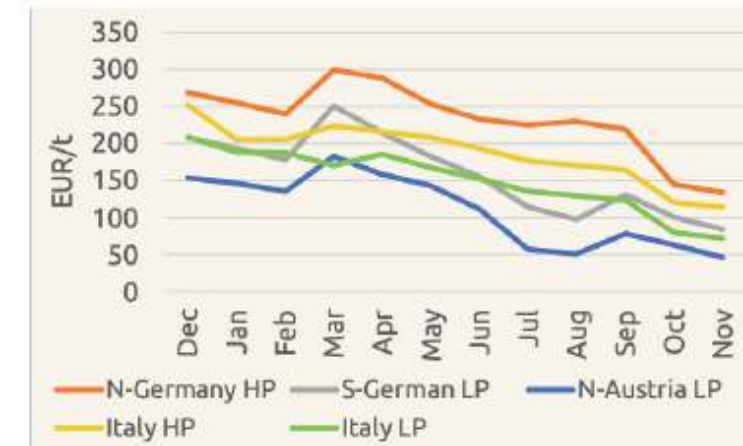


Get the **news about recent developments** on the **Non GM market** including forecasts and results for **European soya cultivation**.



Bertalan Kruppa
Soybean market analyst

Figure 1 Non-GM soymeal premiums* in selected EU regions, front-month (Nov 2021 – Nov 2022)



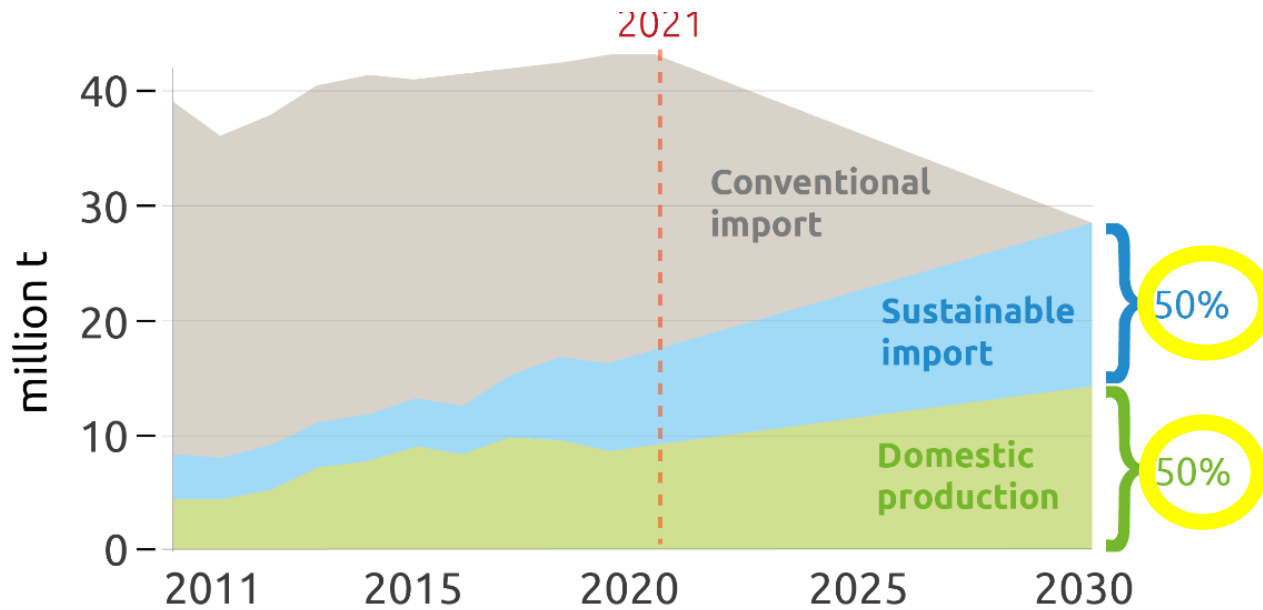
* premiums are rough estimations. German & Austrian values are calculated on the basis of daily price indications. Italian values are calculated by using the weekly price reports of the Bologna Exchange.
Source: Donau Soja

The Market report is a **free service to our members** and can be ordered via marketinfo@donausoja.org

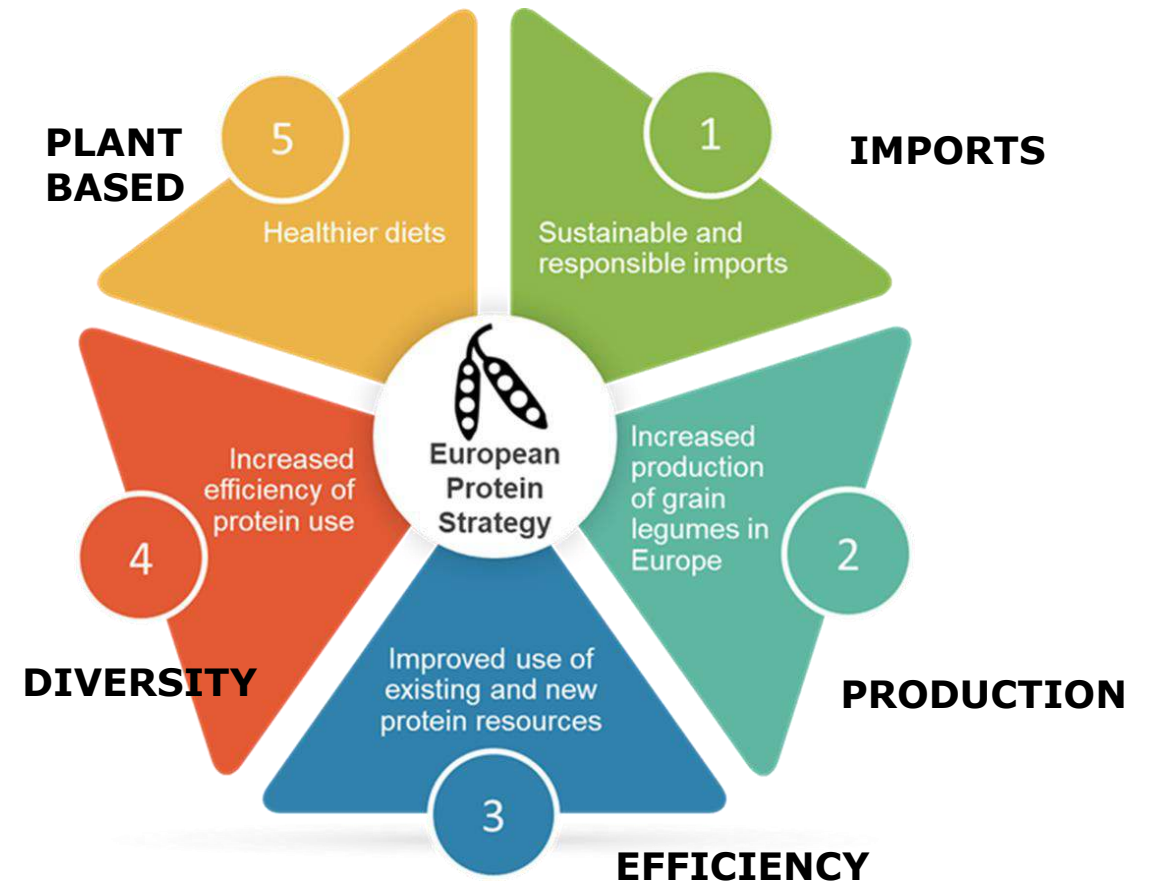
Protein Strategy leads to Protein Transition

Soya sources & consumption

OUR VISION **2030**



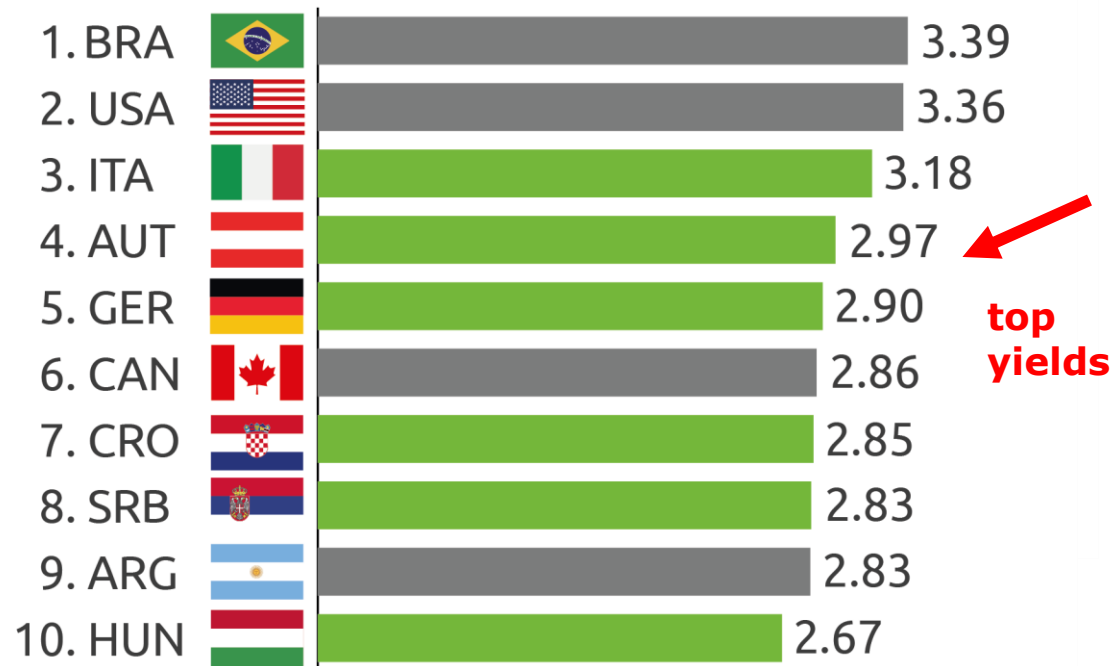
Five pillars for a European Protein Strategy



Soy grows well in Europe, but ...

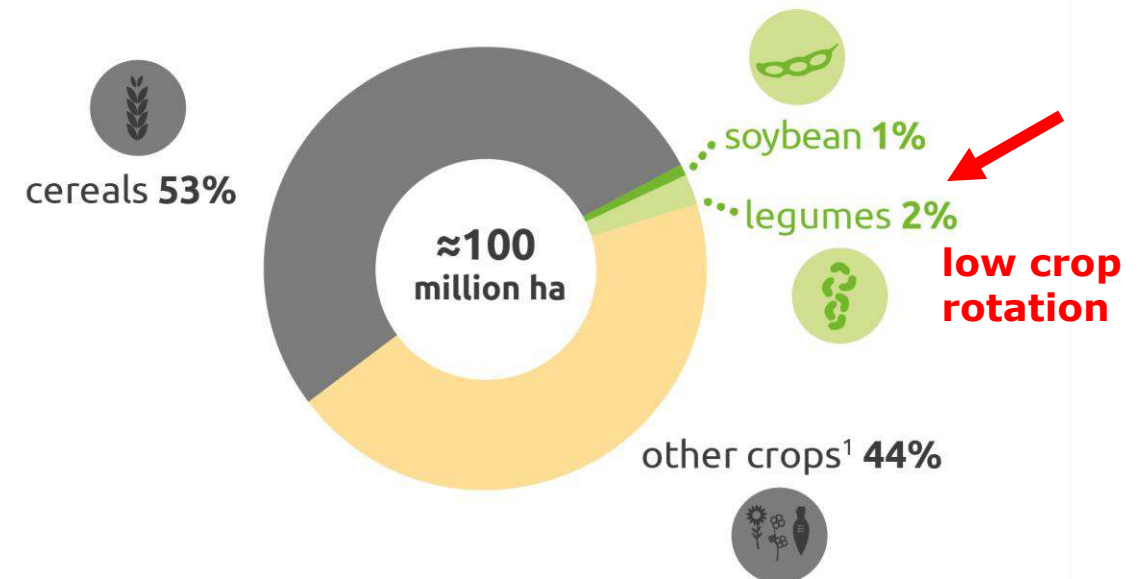
Top yields in Europe, but percentage in European **crop rotation** is **low** plus **yield gap** in CEE/UA, not only for soy → **knowledge transfer** for farmers important, e.g. in Protein Partnership Programm

Top 10 soya yields* (t/ha, avg 2017–21):



* the list includes countries with min. 50,000 ha soybean area in 2022.
Sources: USDA + Donau Soja

Cropping of arable land in the EU (2021):

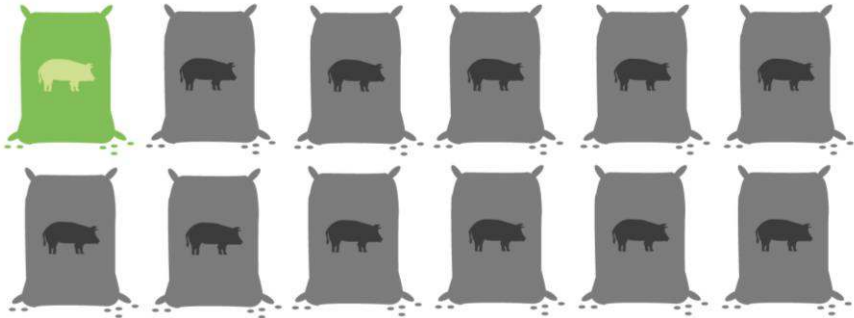


¹ including set-aside and fallow land (area which has been left unplanted for a period of time).
Sources: Donau Soja on basis DG AGRI data

Self-Sufficiency in the EU-27 and Europe

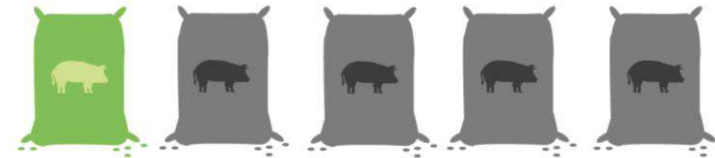
EU: 8 %

of soymeal consumption is covered
by domestic soy production



Europe: 22 %

of soymeal consumption is covered
by domestic soy production



→ Non-EU countries play a significant role in European soya supply

How to realise the potential and increase sustainable soy cultivation in Europe?

In Western Europe:

→ **Soya/legumes are needed as „break crops“**: better crop rotation for agri-economical reasons

In Eastern Europe:

→ **Action is needed to close the yield gap**



Donau Soja's Protein Partnerships Programme is a perfect tool with its knowledge transfer activities for farmers, paying for certification and supporting market update

The Programme in a nutshell

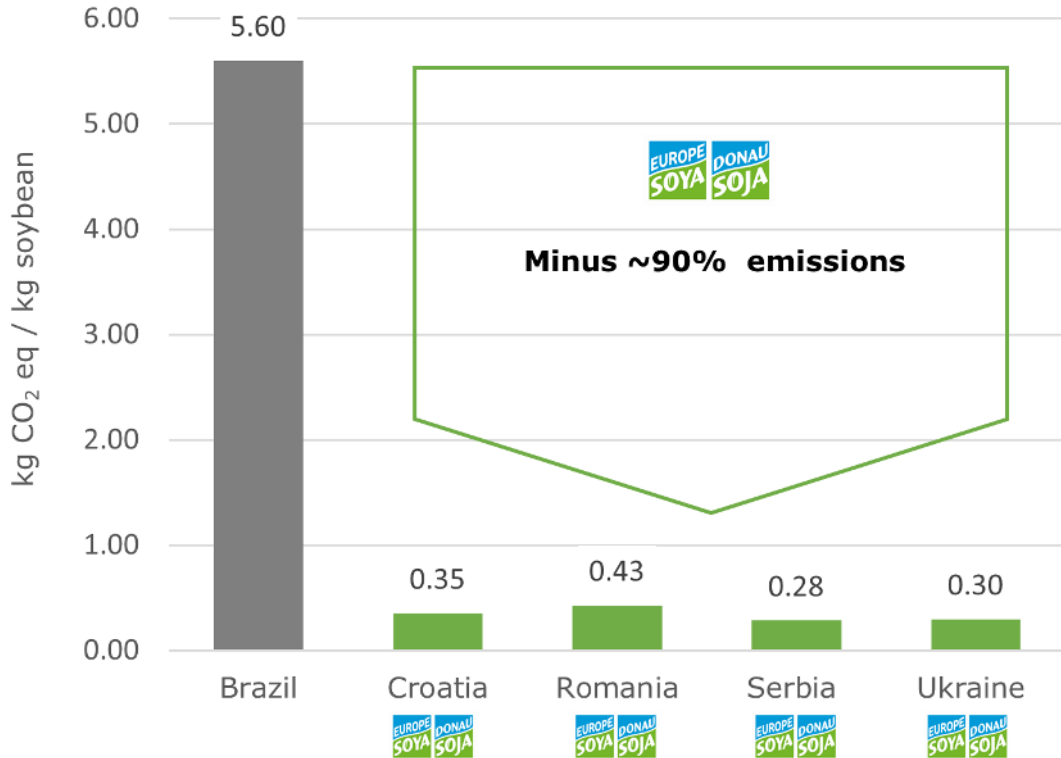
- The purpose is to **increase sustainable soy production** in Europe for Europe
- Mostly in **non-EU countries** because of **impact** in terms of sustainability and volumes
- It covers **knowledge transfer** activities
and **certification** cost
- It supports **market uptake &** value chain building
- Partners may use volumes to **compensate for soya from non-sustainable or unclear origin** (compensate negative soya-footprint)



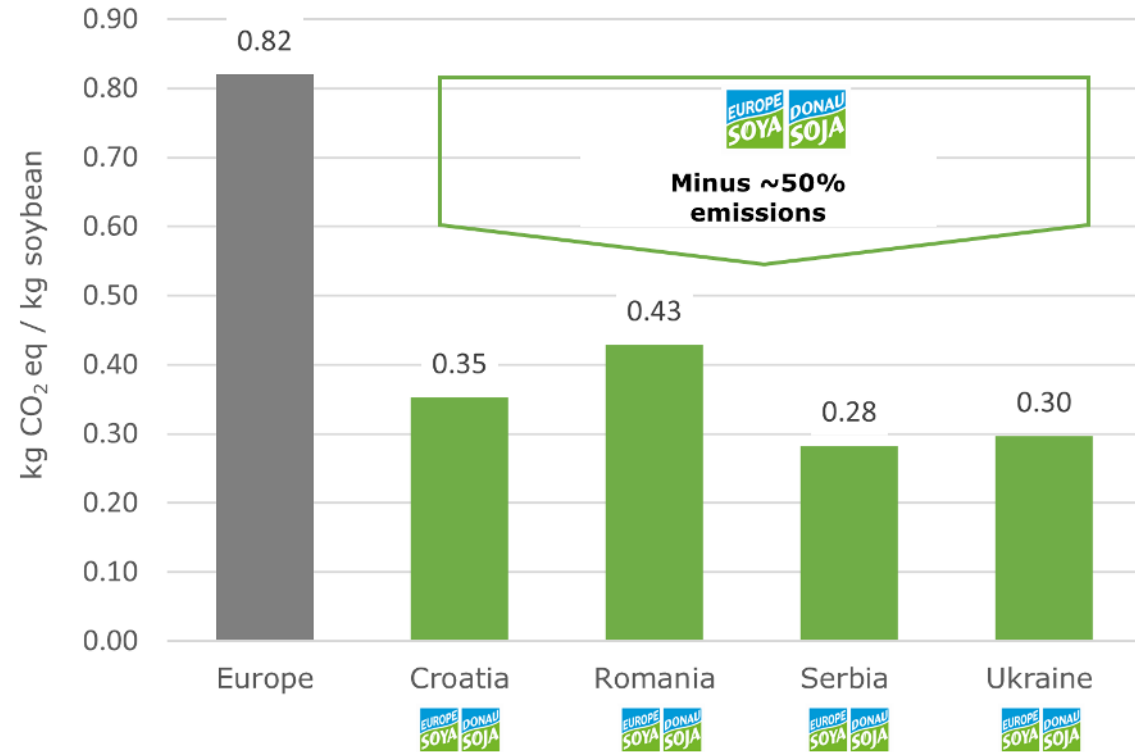
SOYBEANS/-PRODUCTS FROM PROTEIN PARTNERSHIPS ARE
SUSTAINABLE, NON-GM AND DEFORESTATION/CONVERSION-FREE

REDUCTION OF CO₂ EMISSIONS WITH DONAU SOJA

Carbon footprint per kg soybeans



Carbon footprint per kg soybeans



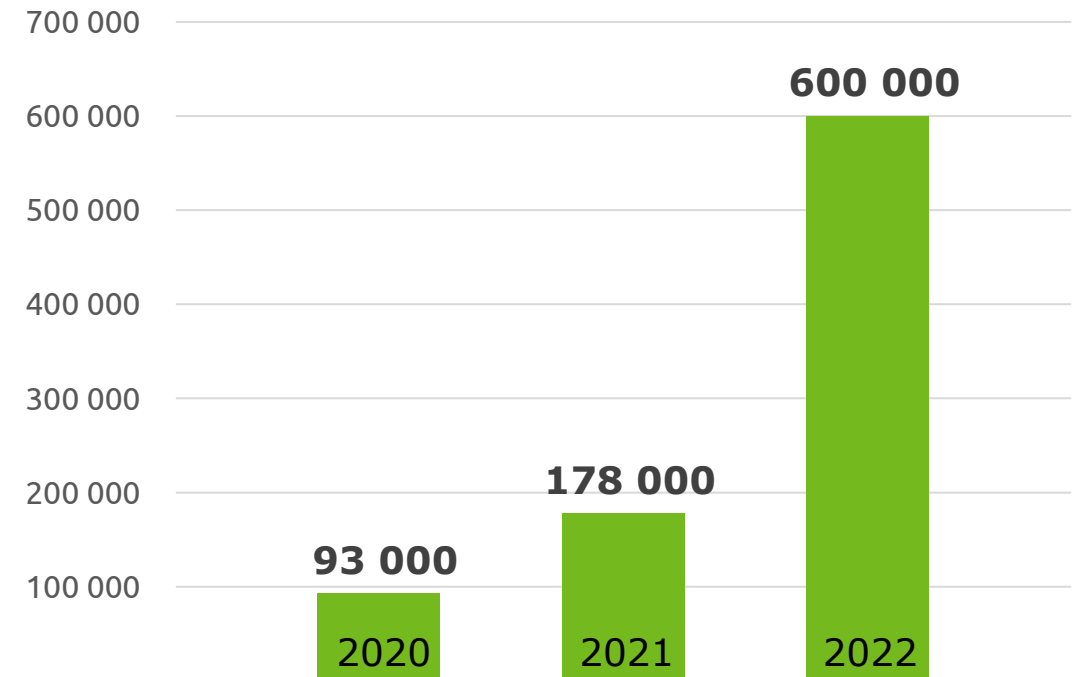
Donau Soja / Europe Soya certified soybeans account for **~0.3-0.4 kg CO₂-eq / kg soybeans**

Source: Agrifootprint 5.0.; Blonk Consultants, 2022

Protein Partnerships: Countries, partners and volumes



Protein Partnership Volumes (in Tonnes)



2019/2020 **2021** **2022**

The Programme has started in **Serbia** and **Croatia**

Ukrainian partners joined the Programme

New partners from **Moldova** and **Bosnia-Herzegovina** joined the Programme

Main supporters of the Protein Partnership Programme in 2022

 Austrian Development Agency



Partnership projects in Serbia, Croatia, Bosnia, Moldova and Ukraine are supported by 13 partners.

Main supporters in 2022 are:

- LIDL Stiftung
- KAUF LAND Stiftung
- REWE Group
- BioMar



In cooperation **with Austrian Development Agency (ADA)**
as a part of the Strategic partnership with Donau Soja organisation

Many thanks for your attention!

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