

EUDR & beyond

**with Donau Soja &
Global Nature Fund**

Webinar

17th October 2023

Agenda

1) European Soya Harvest 2023

Susanne Fromwald, Senior Advisor Donau Soja



2) EUDR & beyond

Christoph Müller, Policy Director Donau Soja



3) New Portal for Deforestation-Free Supply Chains – elan!

Steffen Kemper, Programme Manager Global Nature Fund



Donau Soja ...

- Is a truly European independent multi-stakeholder organisation;
- has more than 320 members in 25 countries;
- has regional offices in some of the major soya growing areas in Europe;
- is non-profit (recognised as such by the Austrian government);
- is supported by 24 governments (Donau Soja & Europe Soya Declarations);
- operates in all sectors along the value chain (incl. plant breeding, farming, processing, distribution, food & feed production, retail) & involves also civil society organisations & NGOs.



Headquarter: Vienna, Austria

Further Regional Offices for SEE and CEE and representation in:

Novi Sad, RS; Kyiv, UA; Chişinău, MD; Bucharest, RO; Amsterdam, NL

Donau Soja Members



More than
320 members in
25 countries

From
all sectors along
the value chain
plus
civil society
organisations

Vision & Mission of Donau Soja

OUR VISION

**A sustainable, safe & European
protein supply.**



OUR MISSION

**Donau Soja supports its partners & members
in tackling social, ecological & economic challenges
in soya production & use.**

Donau Soja is active in the following areas ...

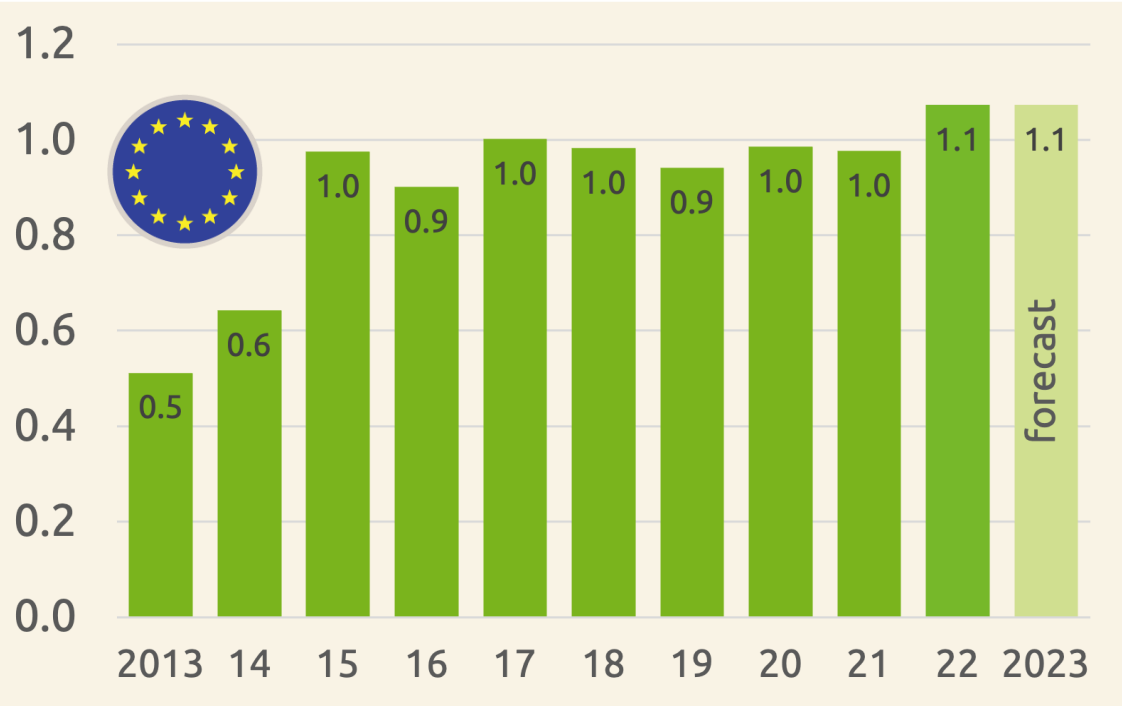
- 1) **Political lobbying & advocacy** at European level: e.g. [Donau Soja & Europe Soya Declarations](#), [European Protein Strategy](#)
- 2) **Market work**, providing a quality scheme and label - [Donau Soja/Europe Soya Standards](#) & quality labels for consumer products as well as Protein Partnerships, a programme to increase sustainable nonGM cultivation by investing in the first step of building physical supply chains
- 3) **Research & Innovation**: Participation in EU projects, e.g. Horizon 2020, [Legumes Hub](#) (European Knowledge Platform); research cooperation with China (Friedrich Haberlandt Scholarship); Development of an isotope database, etc.



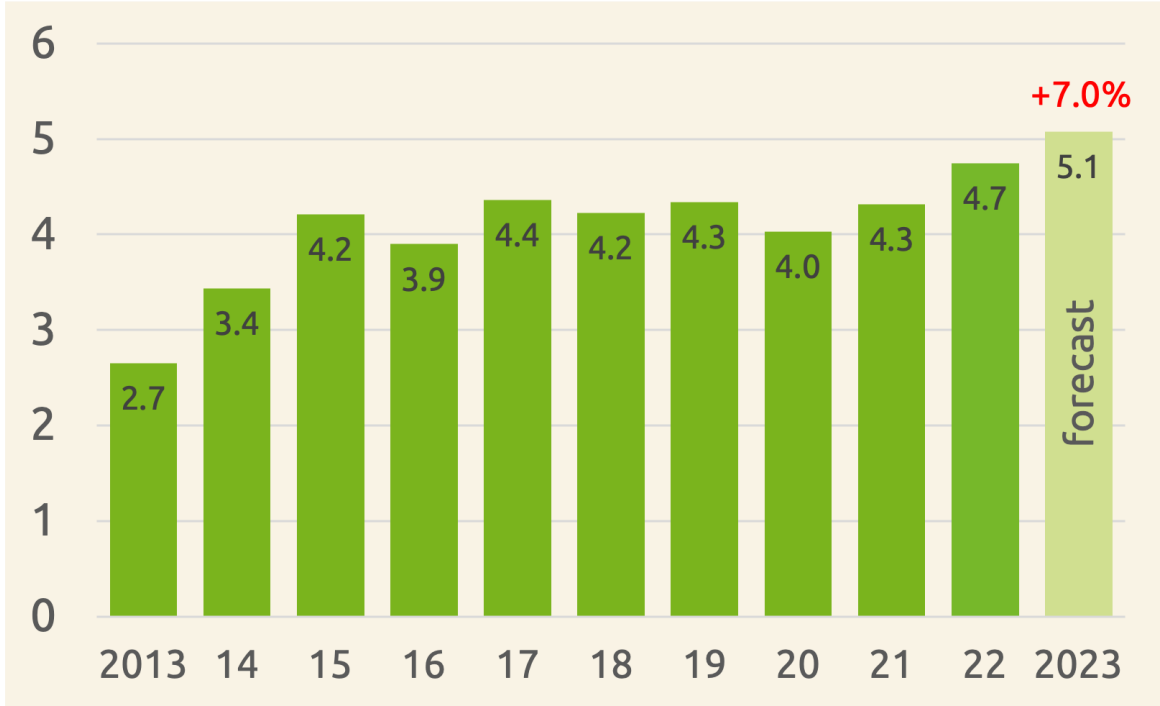
OUTLOOK European Soya Harvest 2023 and Donau Soja

Soybean area in Europe – forecast 2023

Soybean area development in EU-27 (million ha):



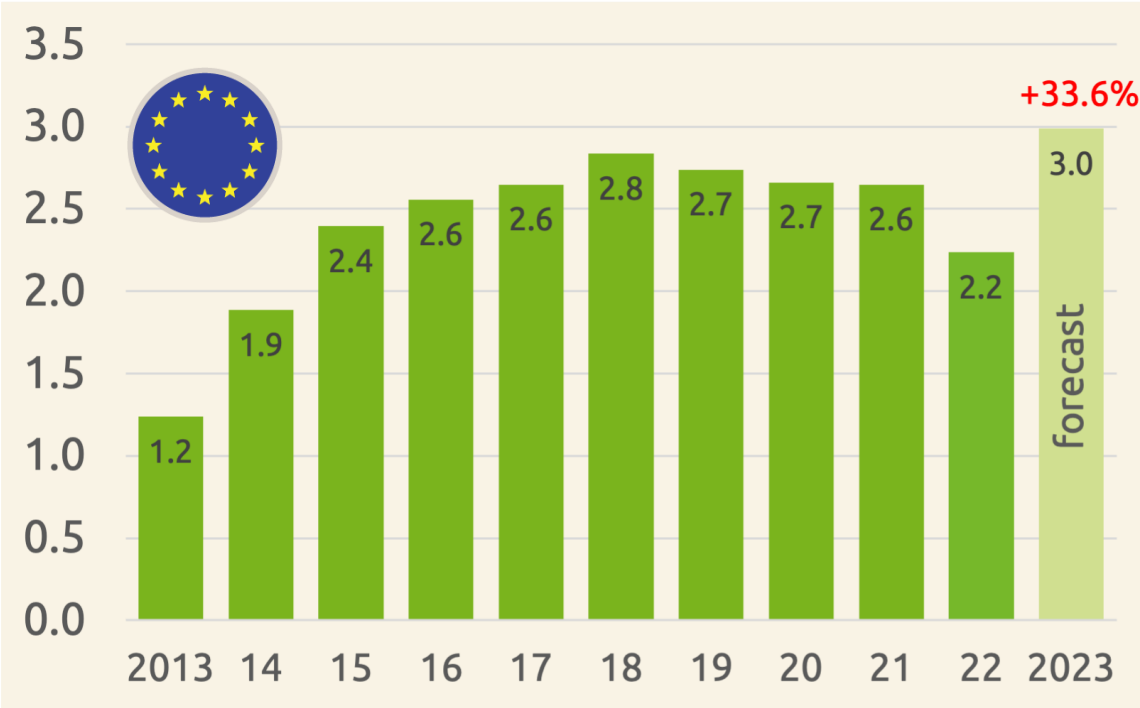
Soybean area development in Europe (million ha):



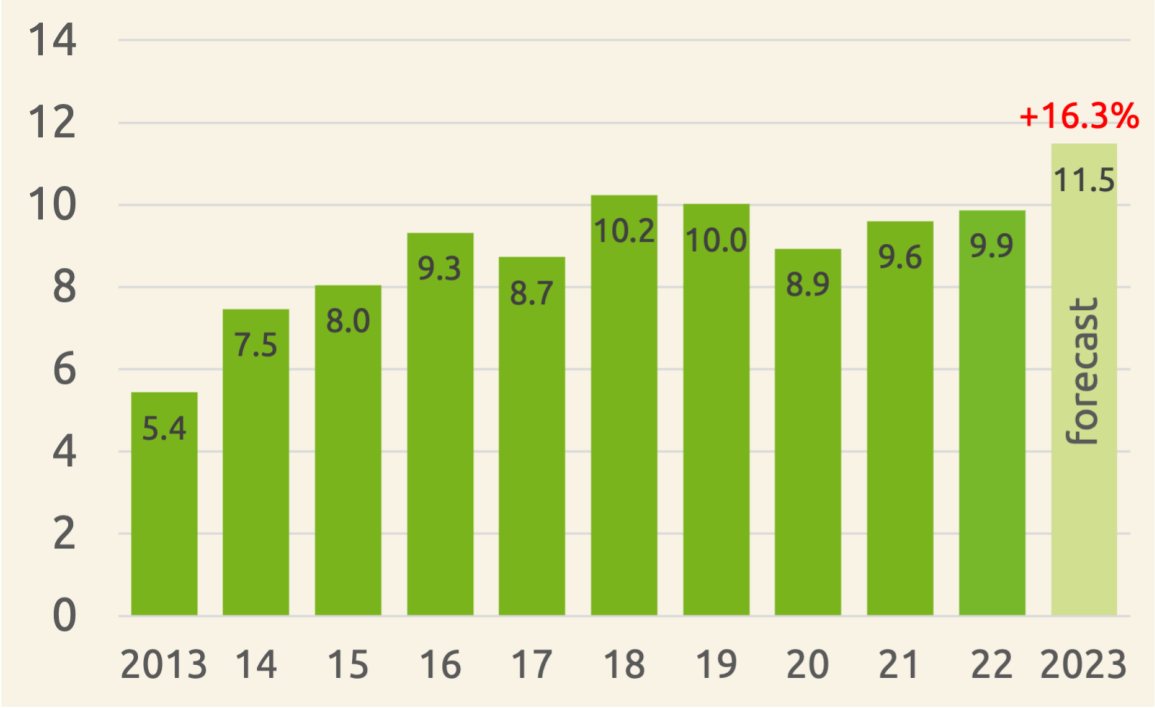
→ Acreage has doubled in the last 10 years; still big potential to increase

Soybean output in Europe – forecast 2023

Soybean output development in EU-27 (million t):



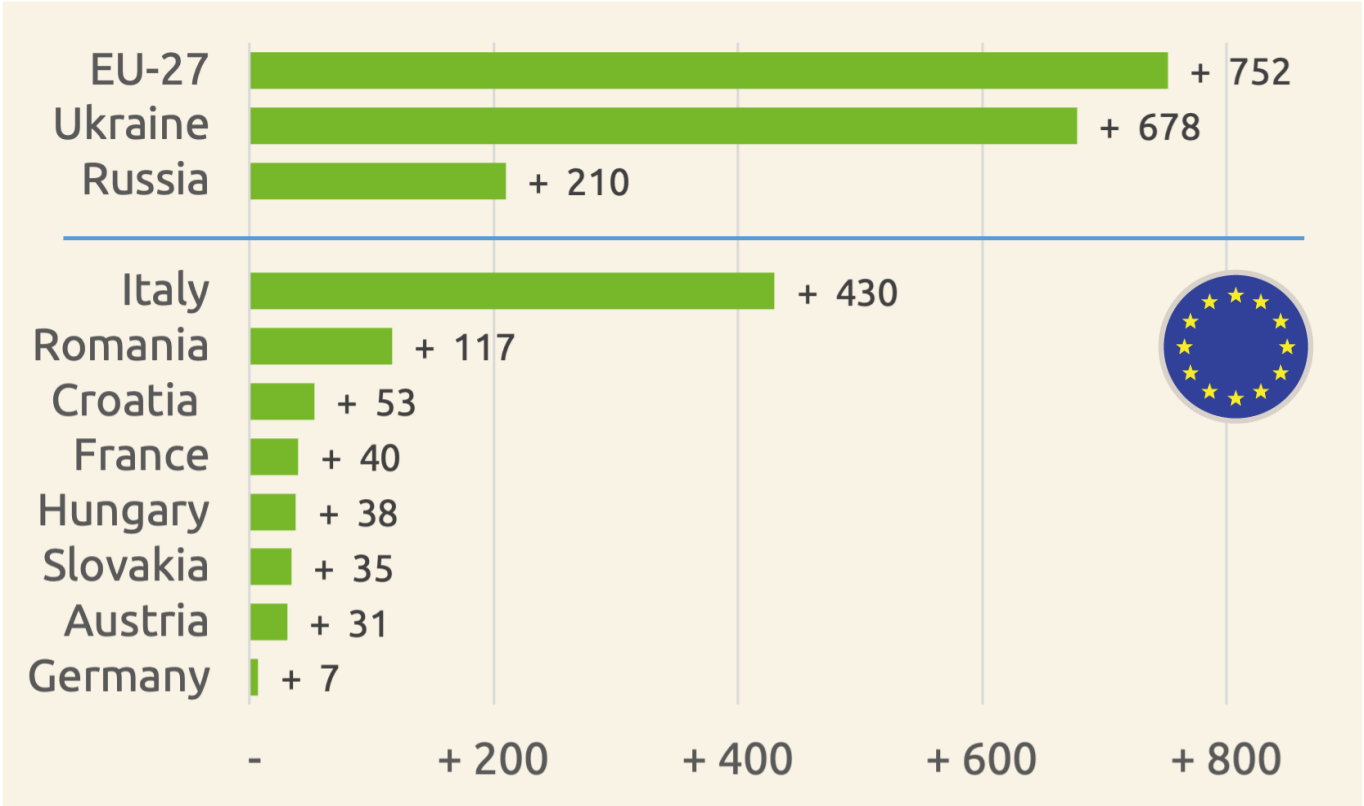
Soybean output development in Europe (million t):



→ All-time high soya output in EU (3 mln t) and Europe (11.5 mln t)

Soybean output in Europe – forecast 2023

Soya output change in Europe – forecast 2023 (1,000 t):



Donau Soja Non-GM Market Report & Prices

Monthly Donau Soja Market Report

- Information on the soya market with a special focus on the European non-GMO sector
- International soybean price development & non-GM premiums/premiums in Europe
- European soybean production forecasts (cultivation/ harvest forecasts)



Daily price developments, e.g. for Germany

- [Daily price developments](#) for the certified Donau Soja & Europe Soya meal on the Donau Soja website in cooperation with [proteinmarkt.de](#)

Availability of Donau Soja & Europe Soya



> **9 000 farmers**

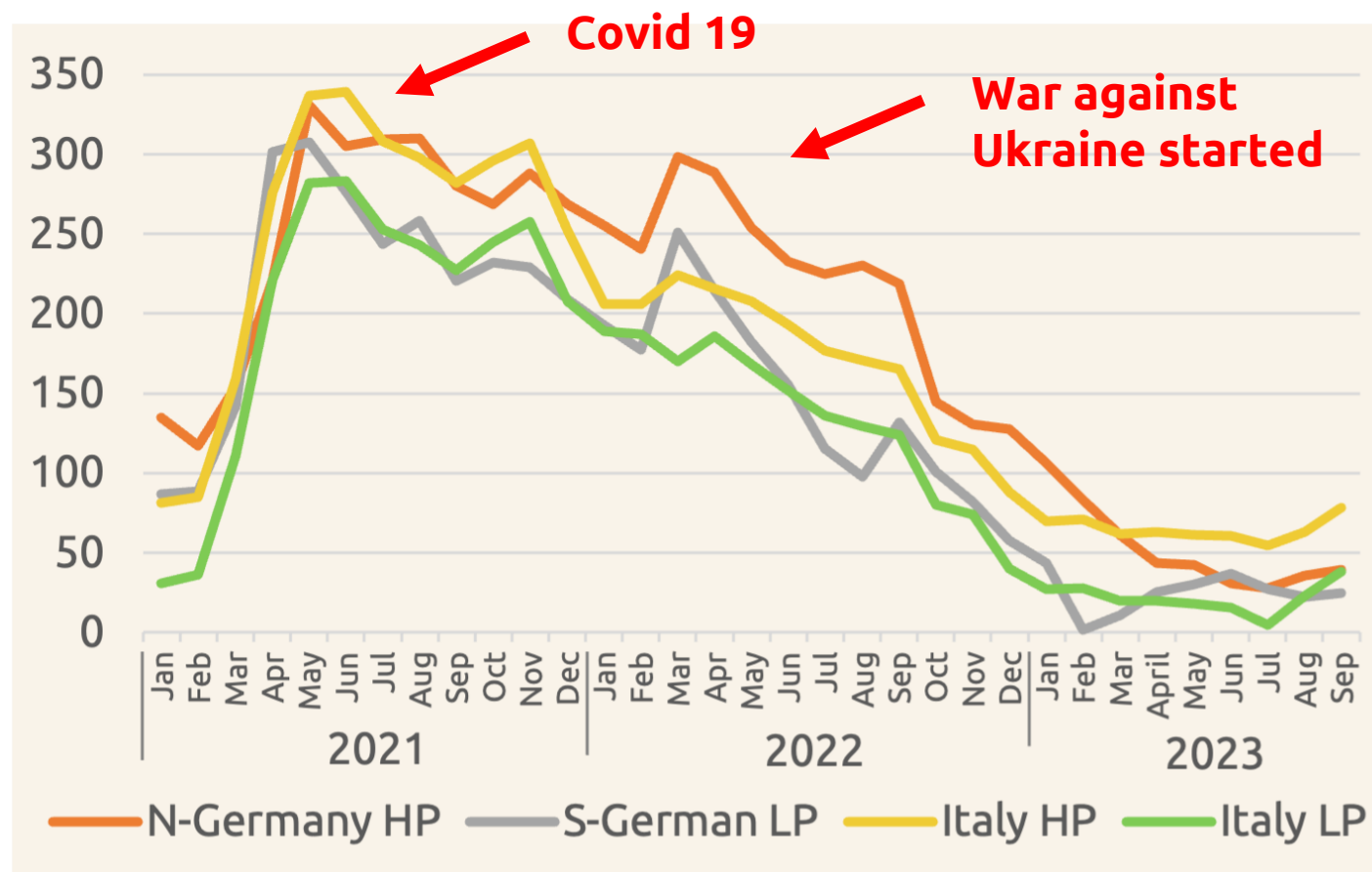
> **200 collectors** certified
in 12 countries

950 certified partners, incl.
11 crushers and
25 smaller soya processors
(e.g. toasters) certified

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

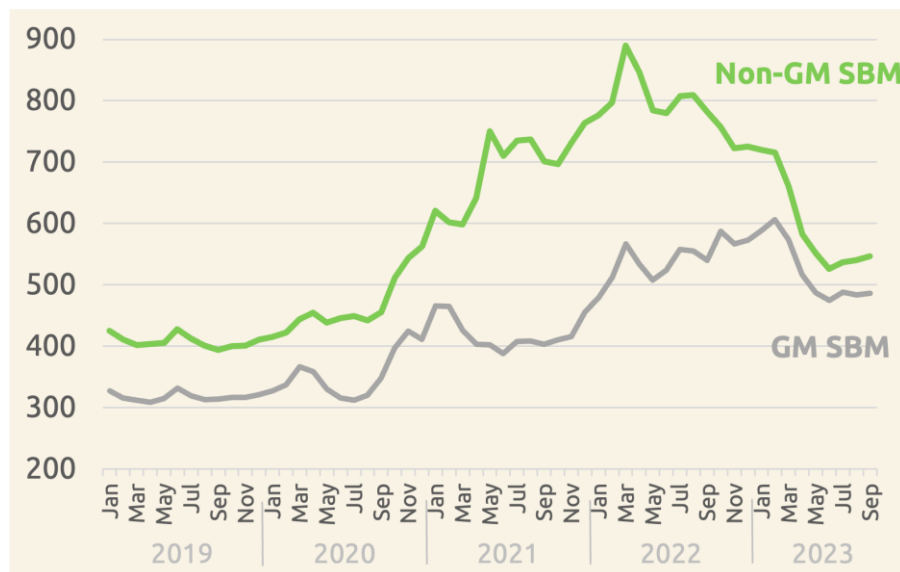
Development of Non-GM soymeal premium

Non-GM soymeal premiums in selected EU regions (EUR/t)



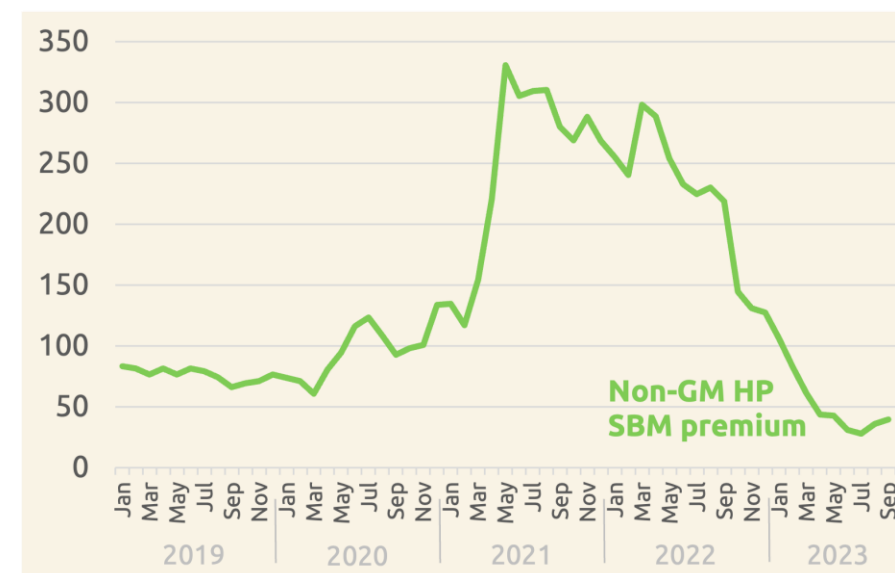
Price development of soybean meal in Northern Germany

Development of average monthly prices for **High-Protein (HP) non-GM/GM Soybean meal** in Northern Germany (Jan 2019 - Sep 2023) in EUR/t



* Notes for the graph: the prices are based on price indications, HP non-GM soymeal refers to front month price development of non-GM high-pro (48% protein) soymeal in Brake. HP GM soymeal refers to front month price development of high-pro GM soymeal (46% protein) in Brake/Hamburg.
Source: prepared by Donau Soja

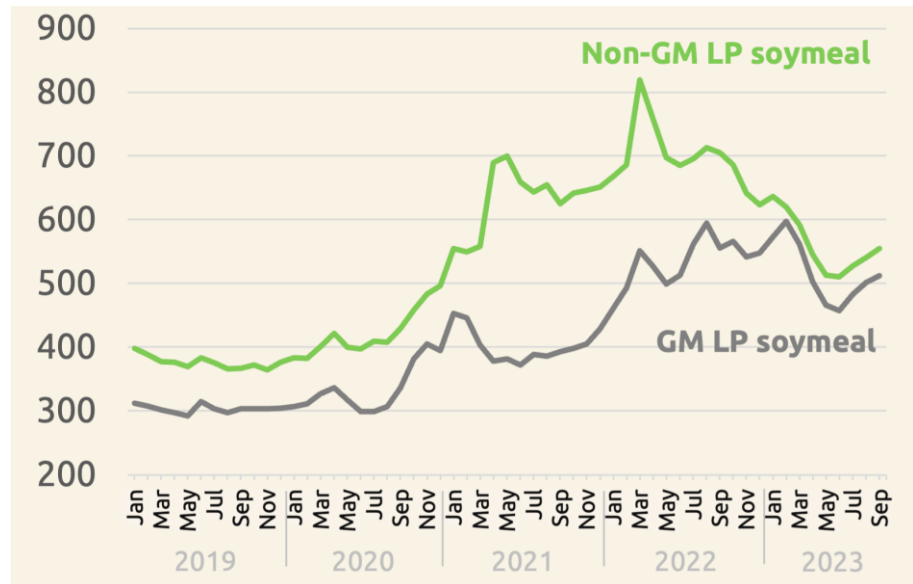
Development of average monthly premiums for **High-Protein (HP) non-GM/GM Soybean meal** in Northern Germany (Jan 2019 - Sep 2023) in EUR/t



* common protein unit was used to calculate the premium
Source: prepared by Donau Soja

Price development of soybean meal in Southern Germany

Development of average monthly prices for **Low-Protein (LP) non-GM/GM Soybean meal** in Southern Germany (Jan 2019 - Sep 2023) in EUR/t



* Notes for the graph: the prices are based on price indications, Non-GM LP soymeal refers to front month price development of non-GM low-pro (43.5% protein) soymeal in Straubing. GM LP soymeal refers to front month price development of GM low-pro soymeal (42% protein) in Mainz.
Source: prepared by Donau Soja















Development of average monthly premiums for **Low-Protein (LP) non-GM/GM Soybean meal** in Southern Germany (Jan 2019 - Sep 2023) in EUR/t



* common protein unit was used to calculate the premium
Source: prepared by Donau Soja

International Recognition of Donau Soja & Europe Soya

Donau Soja & Europe Soya are recognized by the following organisations as sustainable soya standards:

 <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>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>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>Sustainable Agriculture Initiative benchmarked Donau Soja/Europe Soja at FSA Silver Equivalent level.</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>VLOG recognises Donau Soja / Europe Soya certification as equivalent to VLOG standard certification.</p> <p>Germany</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>Donau Soja / Europe Soya are recognised as standard for soybean primary production within the QS-add-on module „Purchase of deforestation-free soy“.</p> <p>Germany</p>

* translated into English by Donau Soja

EUDR & beyond

Christoph Müller, Donau Soja



Where does it come from?

Environmental Background

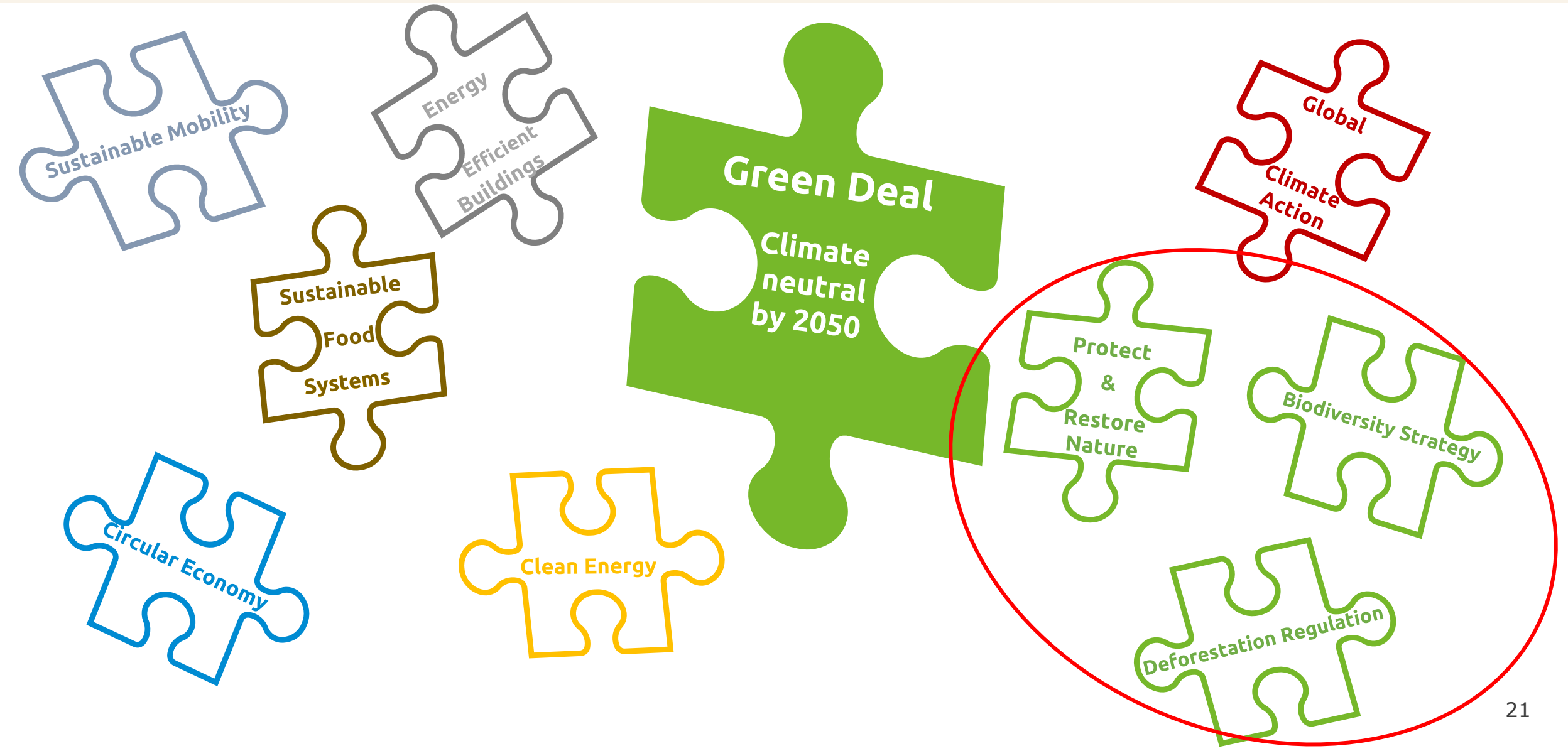


CO₂ Emissions in a Global Context

- **Agriculture & Forestry** account for **23%** of global human greenhouse gas emissions (IPCC, 2021)
- **Deforestation** is responsible for about **11%** of global human greenhouse gas emissions (IPCC, 2021)
- **Soya accounts for 31% of deforestation** from agricultural products **imported into the EU** (WWF, 2021)

Where does it come from?

Legislative Background





What's it about?

From 30.12.2024: Proof that production of relevant commodities was

- 1) **deforestation-free**, with 2020 cut-off date, &
 - 2) in accordance with the relevant **legislation of the country of production**
- before they are placed on the EU market with a so-called **Due Diligence Statement**.

→ Traceability to the plot

- For all plots of land where commodity was produced = **Geolocation-data** required

Commodities

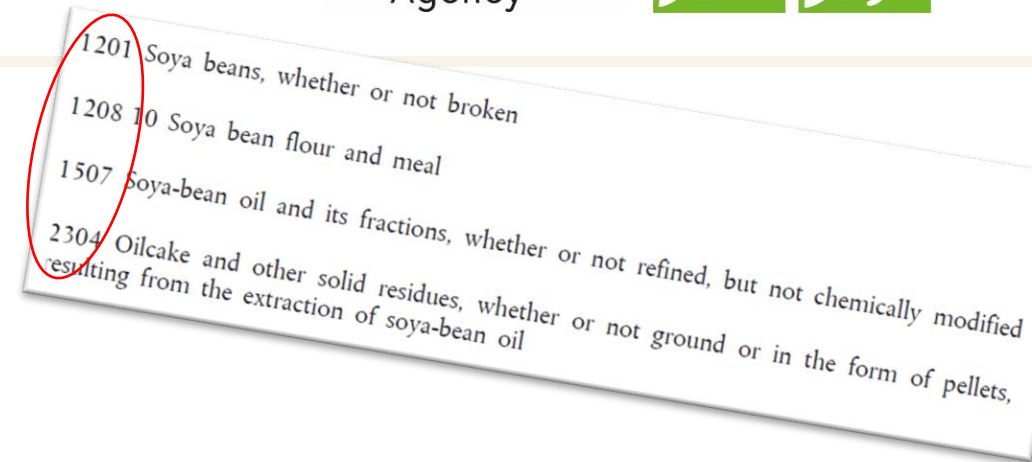




What's it about?

What does soya mean?

- Soya beans, flour, oil + fractions, oilcake + solid residues
→ **Relevant are tariff numbers**



Who is responsible?

- Company placing the relevant commodity on the EU market or exports it

Due diligence examples:

- Compound feed does not fall under the EUDR
- Due diligence for soya/animal feed ends with animal farmer (except cattle)
- No due diligence requirements once soya is consumed (except cattle)
- Retailer do not have to proof origin of animal feed for





What needs to be done?

The **Due Diligence Process** (Article 8) consists of following steps:

1) Information requirements

Always required.

2) Risk Assessment

For standard & high-risk origins.

3) Risk mitigation

If a non-negligible risk is found.

4) Due Diligence Statement

Always required.

Must be uploaded in new Information System **before** product is placed on EU market.





Information Requirements (Article 9) Due Diligence Statement (Annex II)

Following information

- Is always required; for soya produced inside EU or outside & in low, standard or high-risk countries
- Must be gathered, stored for five years & made available to competent authorities upon request

Information Requirement	Example	Due Diligence Statement
Own company name & address		X
Economic Operators Registration & Identification (EORI)	Companies that trade goods have EORI anyway	X
Company from whom you have been supplied	Must be known already anyway	
Company to whom the relevant products have been supplied	Must be known already anyway	



Information Requirements (Article 9) Due Diligence Statement (Annex II)

Green = Donau Soja can help

Following information

- Is always required; for soya produced inside EU or outside & in low, standard or high-risk countries
- Must be gathered, stored for five years & made available to competent authorities upon request

Information Requirement	Example	Due Diligence Statement
Trade name & Quantity	Soybeans – 1,000 kg	X
Harmonised System Code	1201	X
Country of production (where relevant parts thereof)	Serbia	X
Geolocation of all plots of land where the relevant commodities were produced; date/time range of production	Geo-data: 43.413230, 21.321865 Harvest date: 09.10.2023	X
Information that the relevant products are deforestation-free	Various approaches esp. with remote sensing/ satellite images / Landsat / Sentinel /... & registration by government → Clarification from Commission / national competent authorities needed what is accepted as proof	
Information that the relevant commodities have been produced in accordance with the relevant legislation of the country of production	→ Clarification from Commission / competent authorities needed what is accepted as proof	



and Donau Soja



Donau Soja & Europe Soya

EUDR Pilot Projects **Harvest 2023**

- ✓ • Deforestation- & Conversion-free with cut-off date 2008
- ✓ • Compliance with national legislation
- ✓ • Traceability to the plot incl. geolocation data for 2/3 of the certified soya volumes (esp. from Ukraine)

New: → **geo-location of the field plots** included in the **traceability certificates** from the 2023 harvest on

Shortcomings of the EUDR





What's missing?

- Limited to deforestation
 - Other sustainability issues like pesticides, fertilizers, non-GM, crop rotation, ...
 - **Not conversion-free**
- Most conversion of natural land in Brazil is happening in the Cerrado, which is not covered by EUDR
- **Late cut-off date 2020**
 - No NEW deforestation in EU supply chains
 - Most deforestation until recently & associated carbon emissions still linked to EU supply chains



Almost no CO₂-footprint reduction in supply chain & no protection of other sensitive areas



Green Deal: Climate neutral by 2050

- **Reporting on CO₂-footprint & reduction plans**
(among other environmental aspects)
- **Certification beyond EUDR is important**

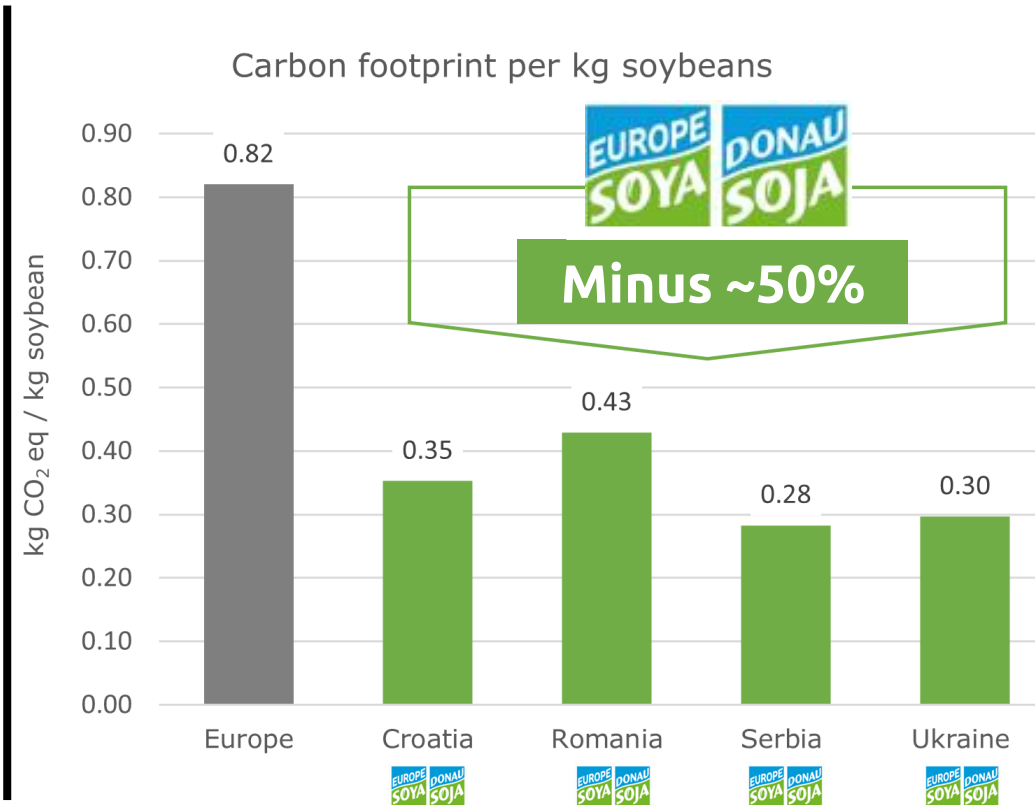
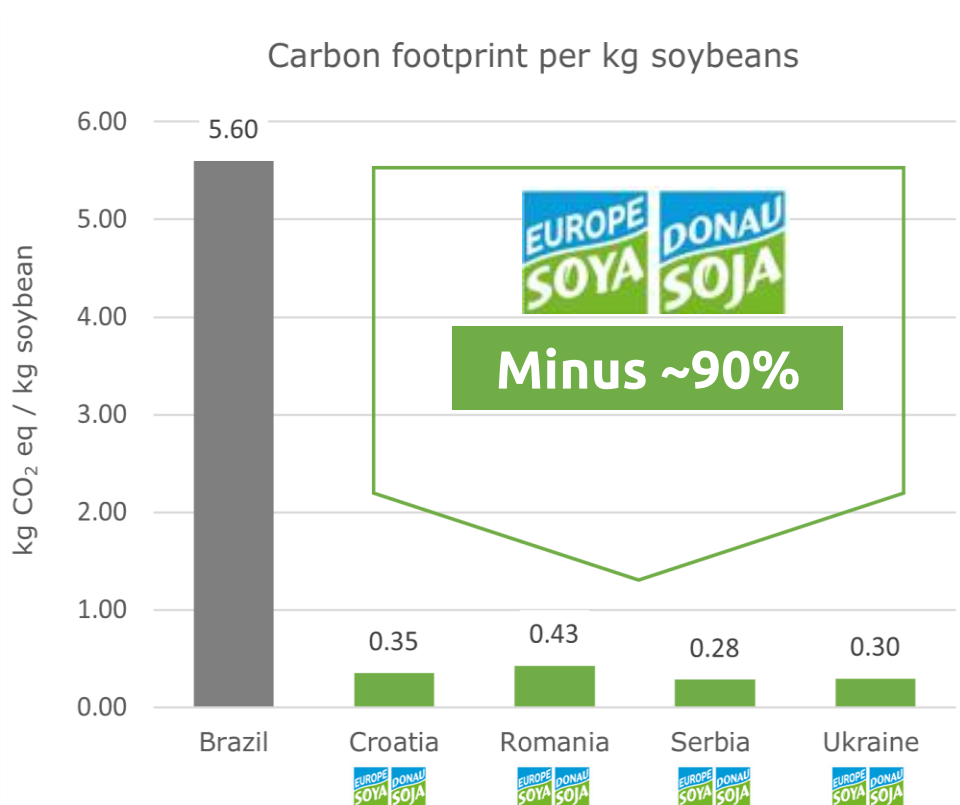


CO₂ Reporting & Reduction



Reduction of CO₂ Emissions with Donau Soja

CO₂ Footprint Comparisons (Blonk 2022)



- CO₂ values are listed in following international databases as "branded datasets"
- More on [our Website](#)



How does Donau Soja come into play?

Voluntary CO₂ reporting & reduction schemes



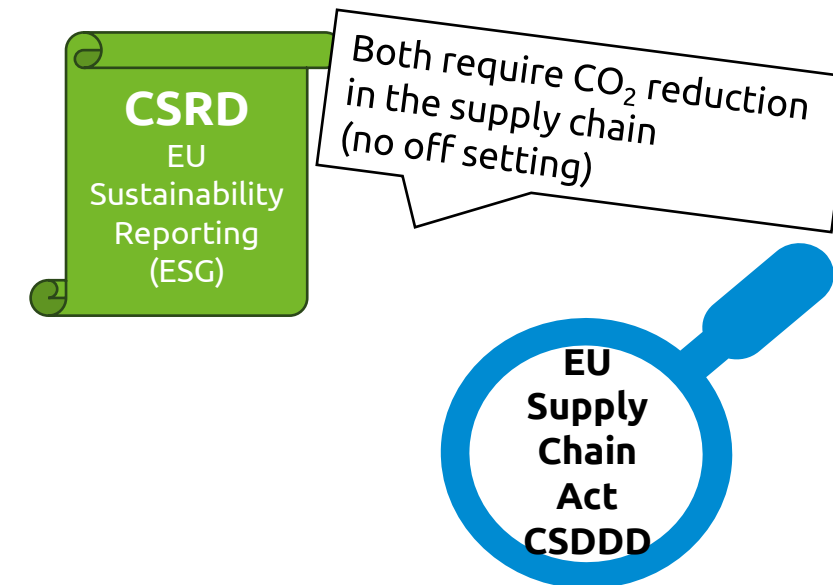
FLAG targets by Dec 2023:
No deforestation & conversion



CO₂

The upcoming
voluntary & mandatory
schemes include **supply
chains (Scope 3) &
reduction measures**

Mandatory CO₂ reporting & reduction regulations



How does Donau Soja come into play?

Voluntary CO₂ reporting & reduction schemes

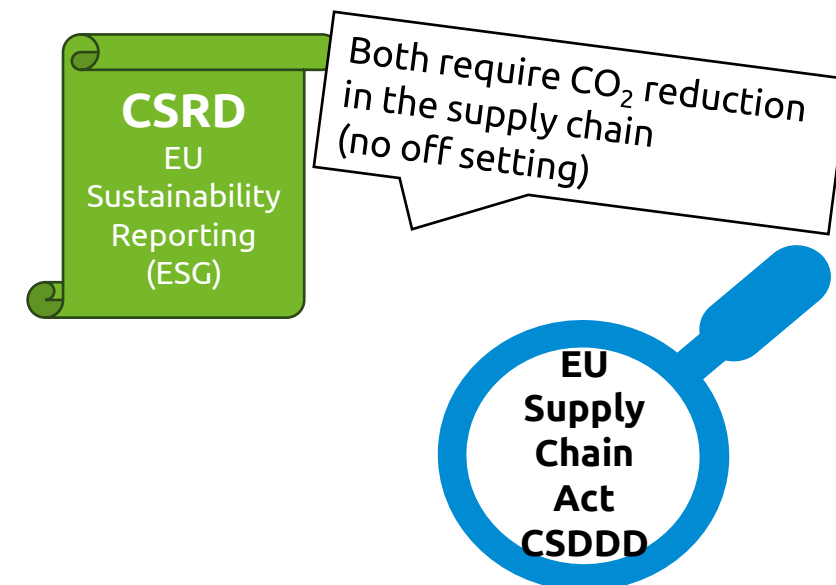


FLAG targets by Dec 2023:
No deforestation & conversion



→ Compliance with
EUDR does not help to
calculate or reduce
CO₂ footprint

Mandatory CO₂ reporting & reduction regulations



How does Donau Soja come into play?

Voluntary CO₂ reporting & reduction schemes

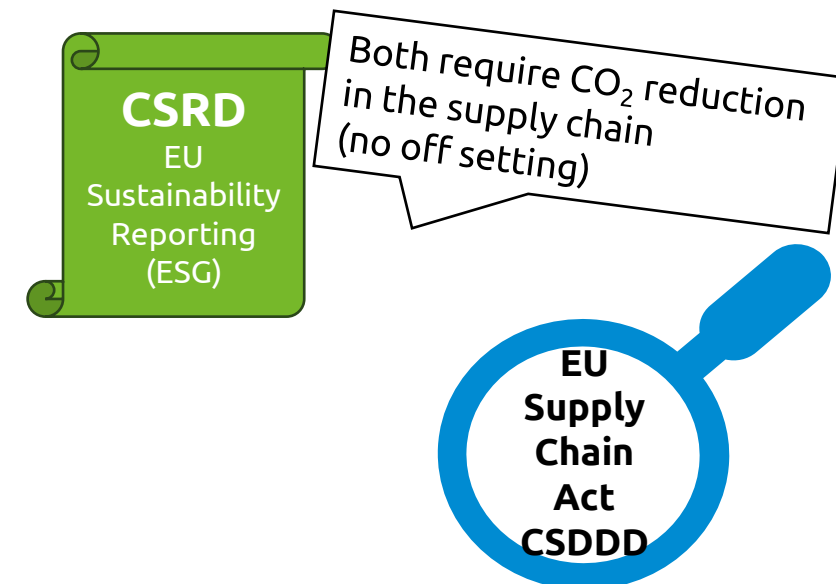


FLAG targets by Dec 2023:
No deforestation & conversion


Life-Cycle-Assessments
(LCAs) show significant
CO₂-reduction

→ - 90% compared to
Brazilian soya beans
→ - 40% for animal
products

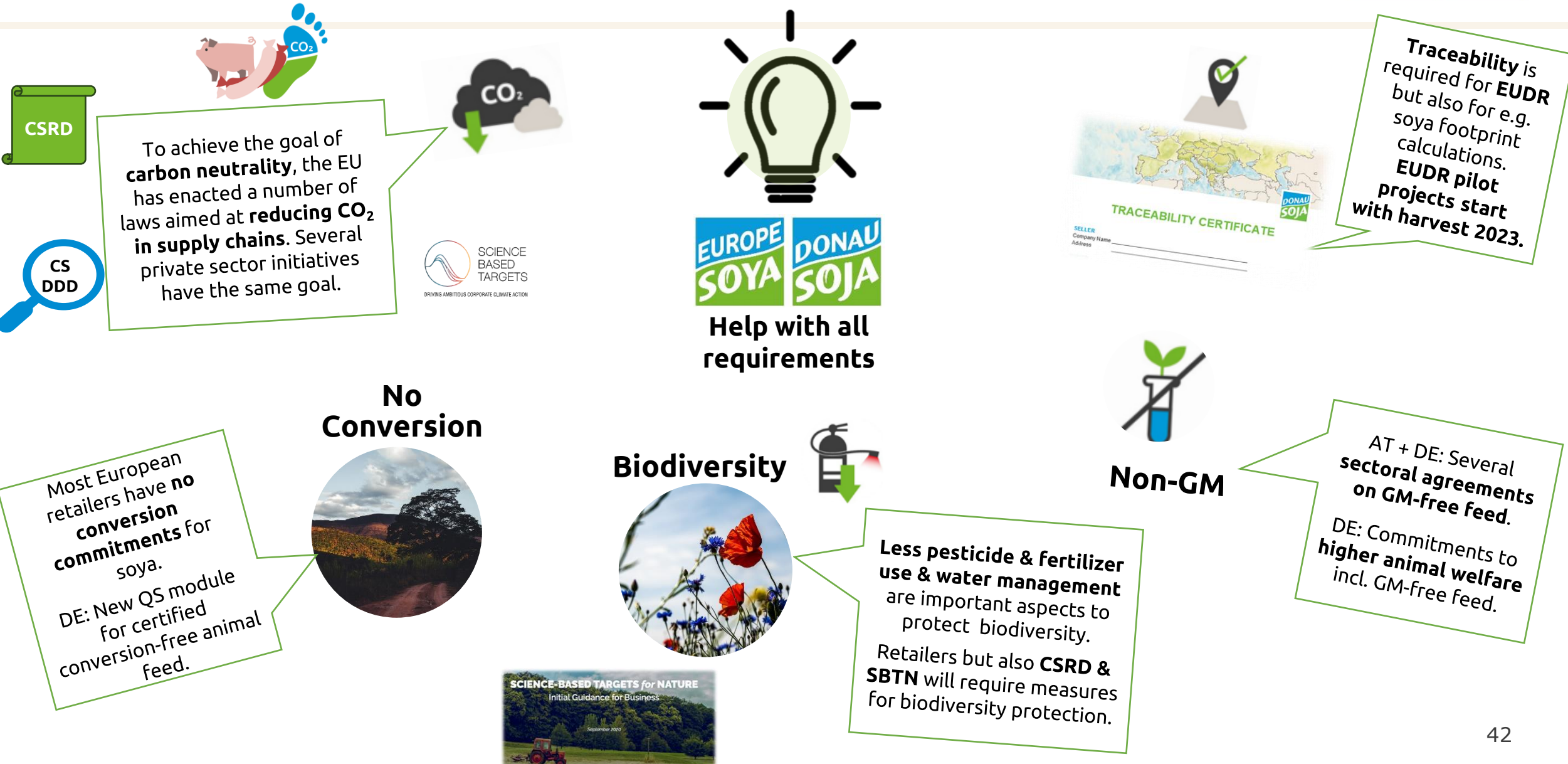
Mandatory CO₂ reporting & reduction regulations



Data registered in recognized CO₂-databases
→ **Helps in calculating & reducing CO₂-footprint**



Multiple Benefits of Donau Soja & Europe Soya



Thank you

Please feel free to ask & discuss

Our contacts for you

Susanne Fromwald: Fromwald@Donausoja.org

Christoph Müller: Mueller@Donausoja.org

Steffen Kemper: Kemper@Globalnature.org

