Donau Soja Webinar

Outlook on European soya in 2024

18 March 2024, 15:30 - 16:30 CET
Soya cultivation in Europe

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The European soya belt

Soya share within arable land:
- <1%
- 1-2%
- 2-5%
- 5-10%
- 10-20%
- >20%

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Soya grows well in many places

### Top 10 soya yields* (t/ha, avg. 2019–23):

<table>
<thead>
<tr>
<th>Rank</th>
<th>Country</th>
<th>Yield</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>BRA</td>
<td>3.42</td>
</tr>
<tr>
<td>2.</td>
<td>USA</td>
<td>3.36</td>
</tr>
<tr>
<td>3.</td>
<td>ITA</td>
<td>3.02</td>
</tr>
<tr>
<td>4.</td>
<td>CAN</td>
<td>3.00</td>
</tr>
<tr>
<td>5.</td>
<td>AUT</td>
<td>2.98</td>
</tr>
<tr>
<td>6.</td>
<td>GER</td>
<td>2.86</td>
</tr>
<tr>
<td>7.</td>
<td>ARG</td>
<td>2.71</td>
</tr>
<tr>
<td>8.</td>
<td>CRO</td>
<td>2.63</td>
</tr>
<tr>
<td>9.</td>
<td>HUN</td>
<td>2.60</td>
</tr>
<tr>
<td>10.</td>
<td>SRB</td>
<td>2.57</td>
</tr>
</tbody>
</table>

*The list includes countries with min 50,000 ha soya area in 2023
Source: Donau Soja based on USDA & Donau Soja data

6 of the top 10 national soy yields are from Europe
Our continent of cereals lacks legumes

Harvested areas of annual crops

- Soybean
- Pulses
- Cereals and maize
- Oilcrops excl. soy
- Others

Europe:
- Soybean: 3%
- Pulses: 3%
- Cereals and maize: 94%
- Oilcrops excl. soy: 0%
- Others: 0%

EU-27:
- Soybean: 3%
- Pulses: 3%
- Cereals and maize: 94%
- Oilcrops excl. soy: 0%
- Others: 0%

Paraguay:
- Soybean: 9%
- Pulses: 46%
- Cereals: 33%
- Oilcrops: 11%
- Others: 0%

Brazil:
- Soybean: 44%
- Pulses: 23%
- Cereals: 33%
- Oilcrops: 0%
- Others: 0%

Argentina:
- Soybean: 61%
- Pulses: 33%
- Cereals: 5%
- Oilcrops: 0%
- Others: 0%

USA:
- Soybean: 33%
- Pulses: 33%
- Cereals: 33%
- Oilcrops: 0%
- Others: 0%

World:
- Soybean: 9%
- Pulses: 46%
- Cereals: 33%
- Oilcrops: 11%
- Others: 0%

China:
- Soybean: 5%
- Pulses: 46%
- Cereals: 33%
- Oilcrops: 11%
- Others: 0%

Only 4% of legumes in the European Union

Source: FAO and other national statistics. Data from 2021.
## Benefits and improvements due to soy cultivation in Europe

### Local

**Soil**
- Fix N → **humus** & carbon development
- Suitable soil structure for the next crop.

**Nitrogen cycle**
- No N-fertilisers needed → **less N2O emissions** & less **risk of leakages** to water bodies

### Systemic improvement

**Biodiversity**
- Breaking pest cycles in cereals → **less pesticides**

**Protection of ecosystems**
- Contributes to **relieve the pressure** on forest and grassland ecosystems overseas

Other legumes may provide even more benefits.
Thoughts on closing the protein gap by expanding soy cultivation

1) Increase European cultivation (by area)
   • 2-3 million ha potential in the EU (1m today) and further potential in Ukraine etc.
   • No leakage effect: EU's wheat net export is 28m t = 4.5m ha (avg. 2017-2021)

2) Increase European harvest (→ closing the yield gap)
   • Skilled farmers
   • High-quality inputs (seeds, inoculants, etc.)

3) Decrease the total need
   • Healthy and sustainable diets
   • Precision feeding
   • Improving the use of existing and new protein sources

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Certified raw materials for cutting carbon emissions

- DS/ES CO₂ data available as "branded datasets" in recognised databases
- Suitable for SBTi FLAG format

Emissions of meat/egg production are cut by ~40%