

Soybean harvest in Europe for 2025

highlighting the relevance of Ukraine for strengthening the European protein supply

Webinar, 29 October 2025



With funding from



Austrian
Development
Agency

Welcome to our webinar!

We will start in just a few moments.

While you're waiting, why not connect with us?
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Overview



Susanne Fromwald
General Secretary

Introduction to Donau Soja
& your moderator today



Bertalan Kruppa
Soya Market Analyst

Soya in Europe:
Outlook 2025 and Vision 2035



Volodymyr Pugachov
Executive Director
Donau Soja CEE/Ukraine

Development & relevance
of Ukrainian soy production

Followed by Q&A

About Donau Soja



Susanne Fromwald
Secretary General
Donau Soja Association

Donau Soja

- is an independent, **non-profit** organization with a head office in Vienna and regional offices in main soy growing areas outside the EU
- is **supported by 24 EU governments** through the Donau Soja & Europe Soya Declarations
- has **~340 members** in **33 countries**,
- has **> 900 certified partners** and **~10,000 farmers** in the certification system
- **~ 1 million tonnes** of certified soya from 11 European countries (harvest 2024)
- does **cross-sector work**: plant breeding, agriculture, processing, food & feed production, distribution, retail & civil society



The Donau Soja offices:

- Vienna/Austria,
- Novi Sad/Serbia,
- Chişinău/Moldova,
- Kyiv/Ukraine

Our vision & mission



VISION

A sustainable, safe & European protein supply



MISSION

Donau Soja supports its partners and members in progressing change to address social, environmental and economic challenges in sustainable soya production and consumption.

We call for a comprehensive Protein Strategy for Europe



The way we produce & use protein has far reaching consequences for society & the environment

Five pillars to close the protein gap & establish a safe & sustainable European protein supply

Donau Soja is active in the following areas

- 1) Political lobbying & advocacy** at European level: e.g. [Donau Soja & Europe Soya Declarations](#), [Protein Strategy for Europe](#)
- 2) Market work**, providing a quality scheme - [Donau Soja/Europe Soya Standards](#) & quality labels for consumer products as well as Protein Partnerships, a programme to increase sustainable non-GM cultivation in Europe for Europe
- 3) Research & Innovation**: Participation in EU projects, e.g. Horizon 2020, Microbiomes4Soy, [Legumes Hub](#) (European Knowledge Platform); collaboration with 'EIT Food Regenerative Agriculture Programme'



Non-GM Market Report & daily price updates

Monthly Donau Soja Market Report

Information on the soya market with a special focus on the European non-GM sector, soya price development internationally & non-GM premiums/surcharges in Europe; forecasts for European soya production (cultivation area, harvest volumes & price forecasts).

<https://www.donausoja.org/news/market-report/>



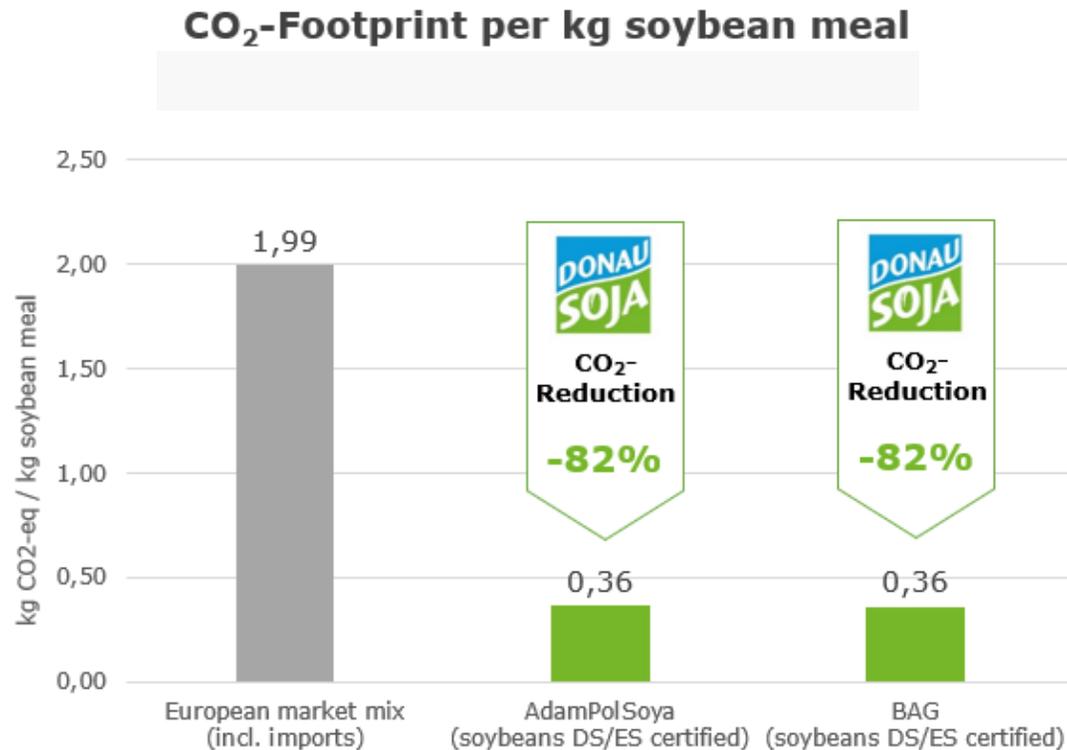
Daily price information for Donau Soja/Europe Soya

Keeps you updated on Europe Soya/Donau Soja certified soya meal prices in different regions in cooperation with proteinmarkt.de.

<https://www.donausoja.org/ds-es-soya-bean-meal-prices/>



CO₂-Reduction in Soybean Meal with Donau Soja



82% CO₂ reduction compared to average soymeal processed in Europe

LCAs conducted by FiBL Austria for the soya processors AdamPolSoya & BAG shows that the soya meal produced with DS/ES certified soya results in 0.36 kg CO₂e/ kg soya meal

Outlook on Harvest Season 2025



Bertalan Kruppa

Soya Market Analyst
Donau Soja



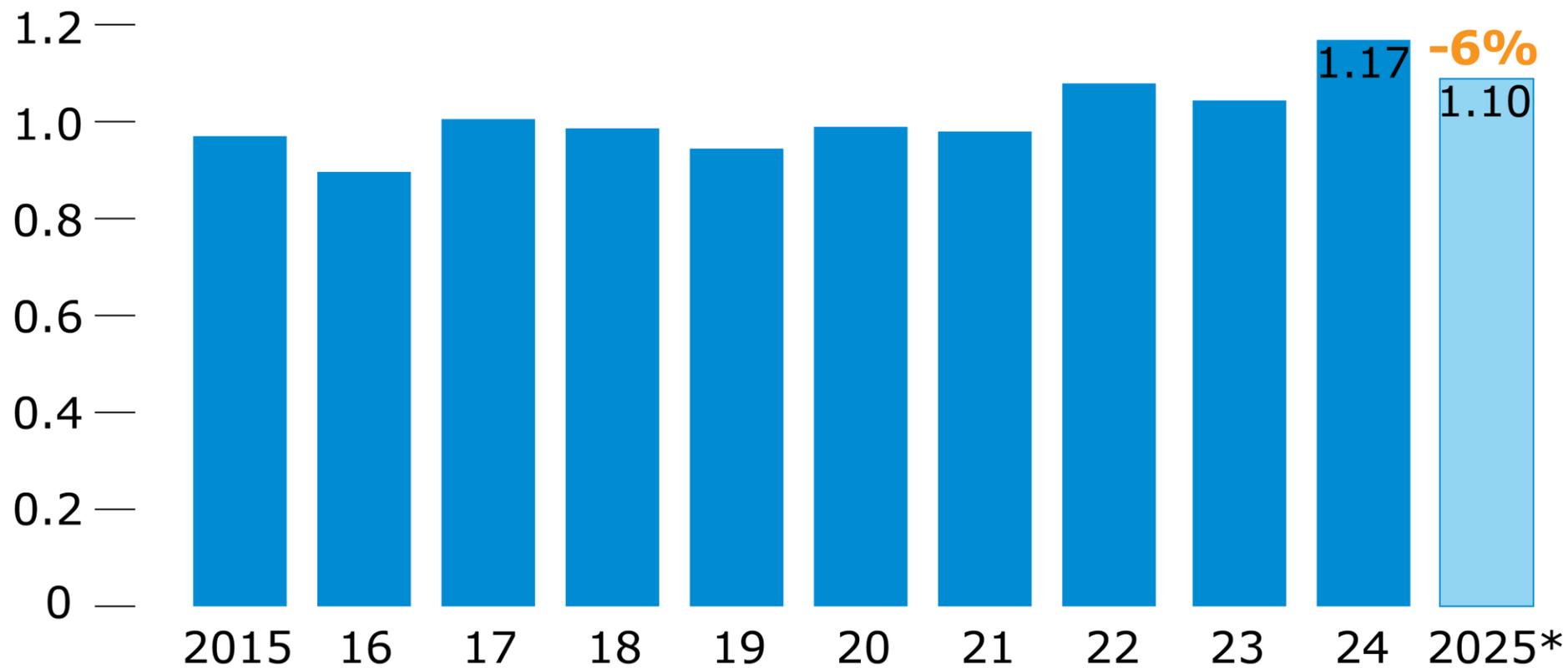
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Soya area in EU-27

million ha

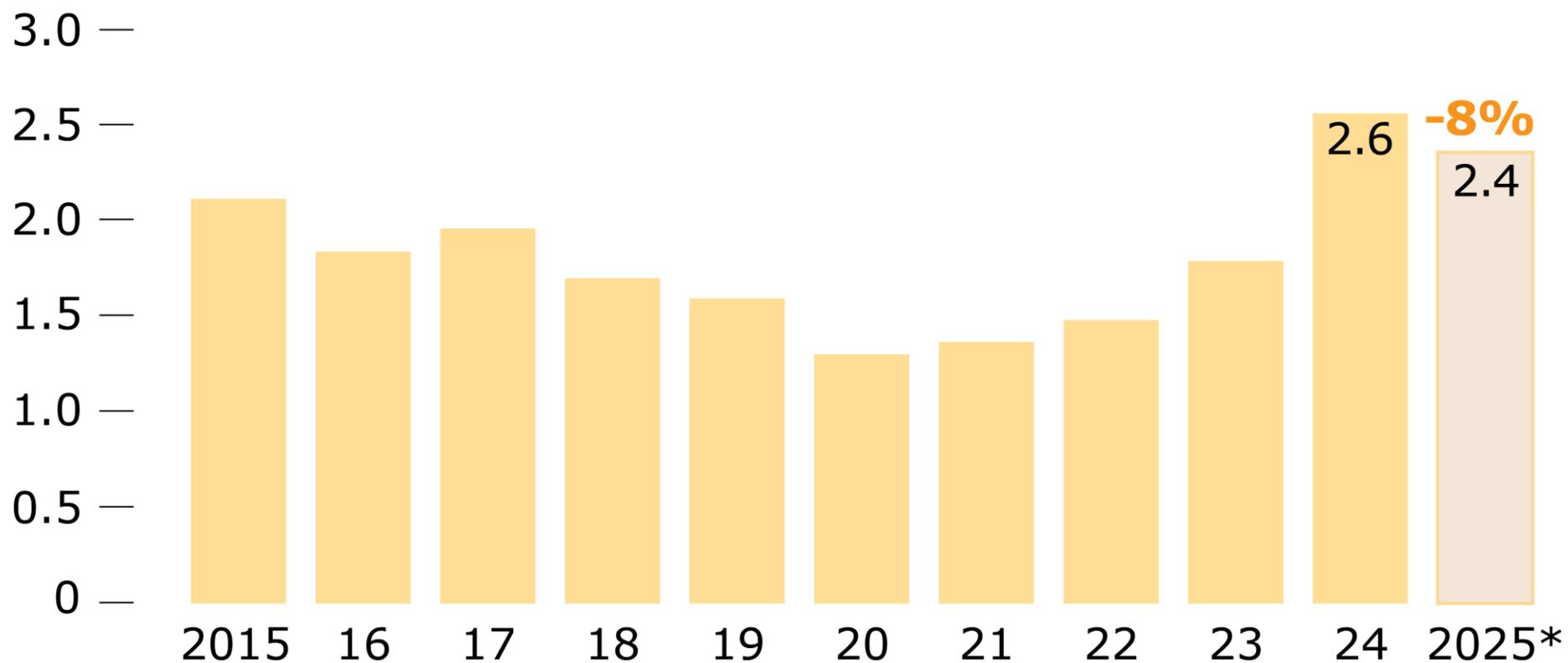


* forecast

Source: Donau Soja

Soya area in Ukraine

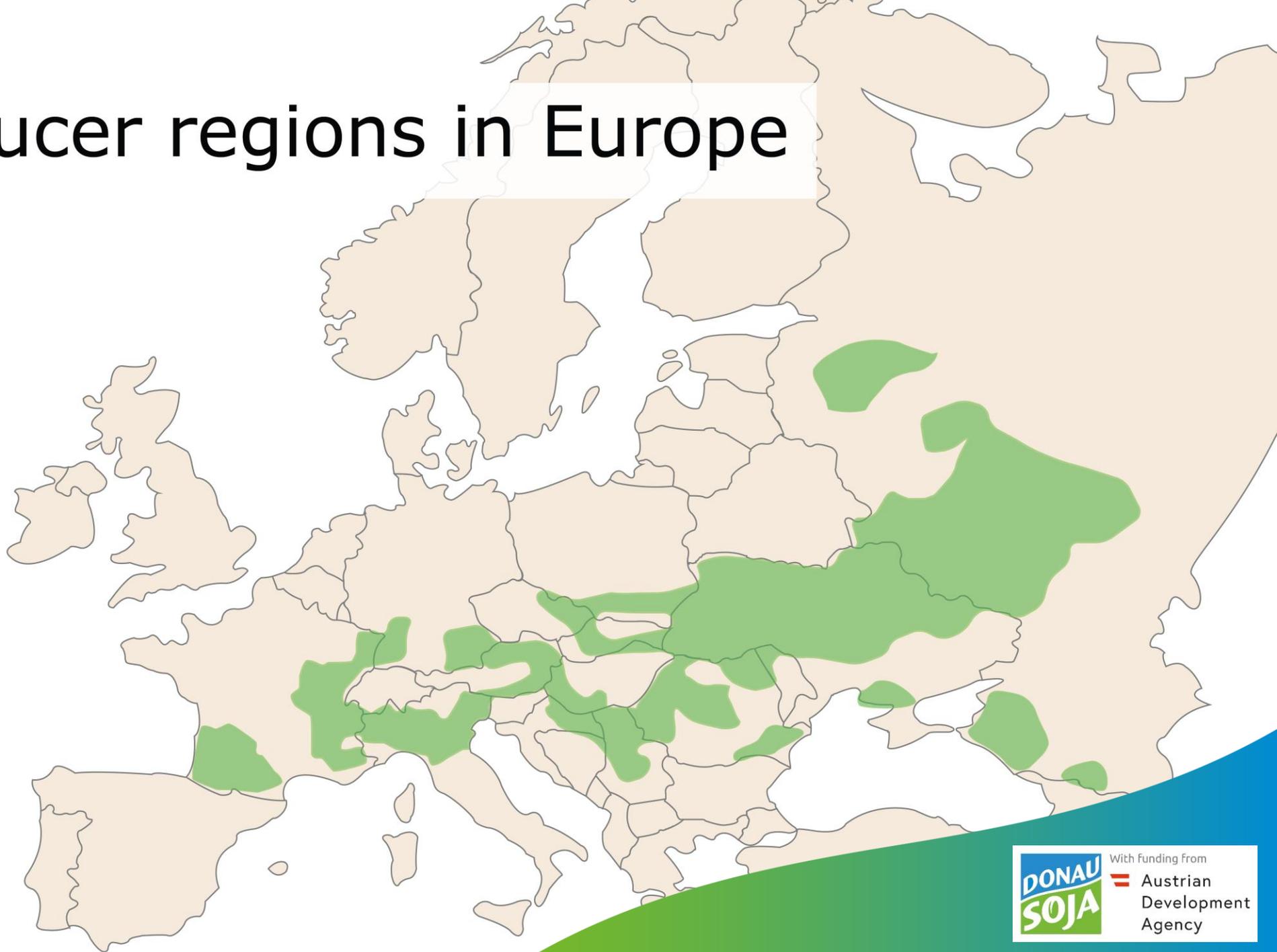
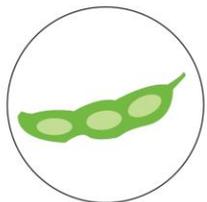
million ha



* forecast

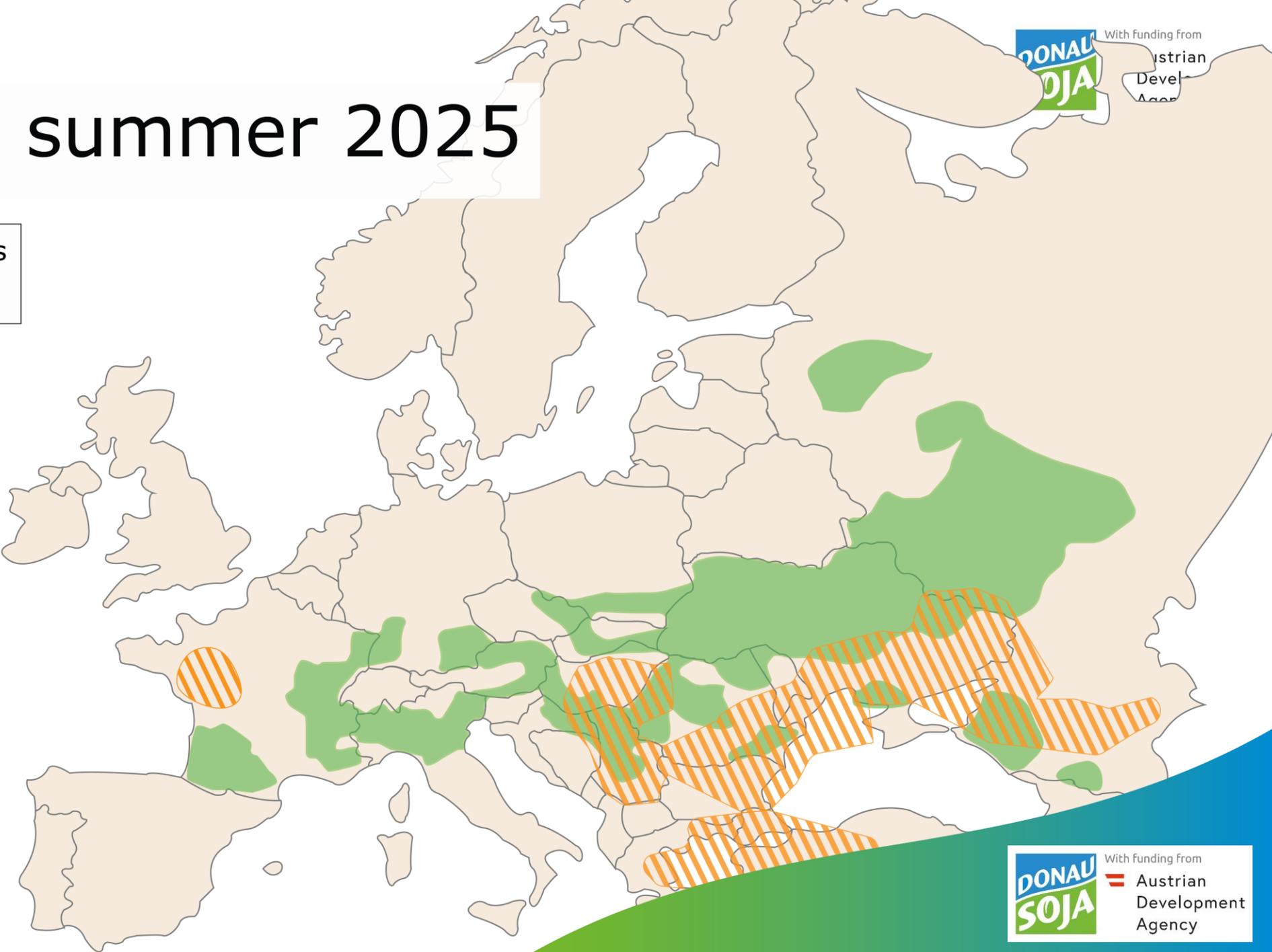
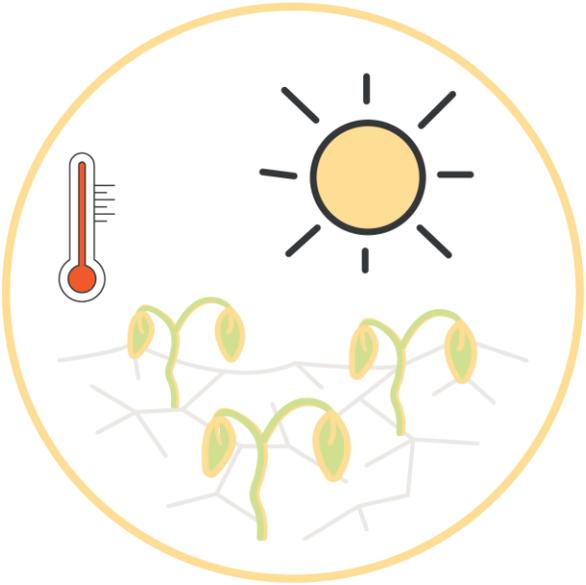
Source: Donau Soja

Soya producer regions in Europe



Drought in summer 2025

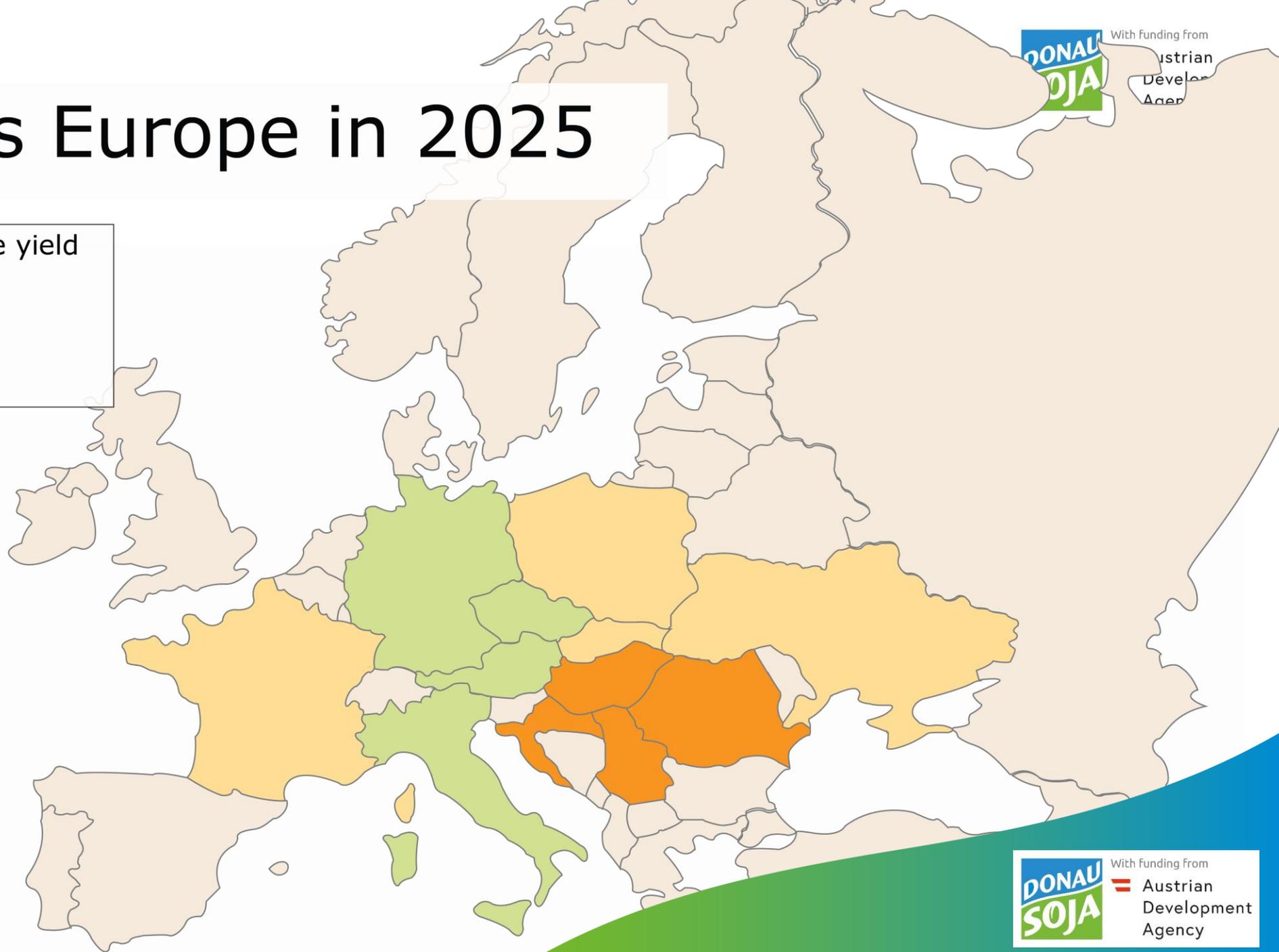
 Soya producer regions
 Severe drought



Soya yields Europe in 2025

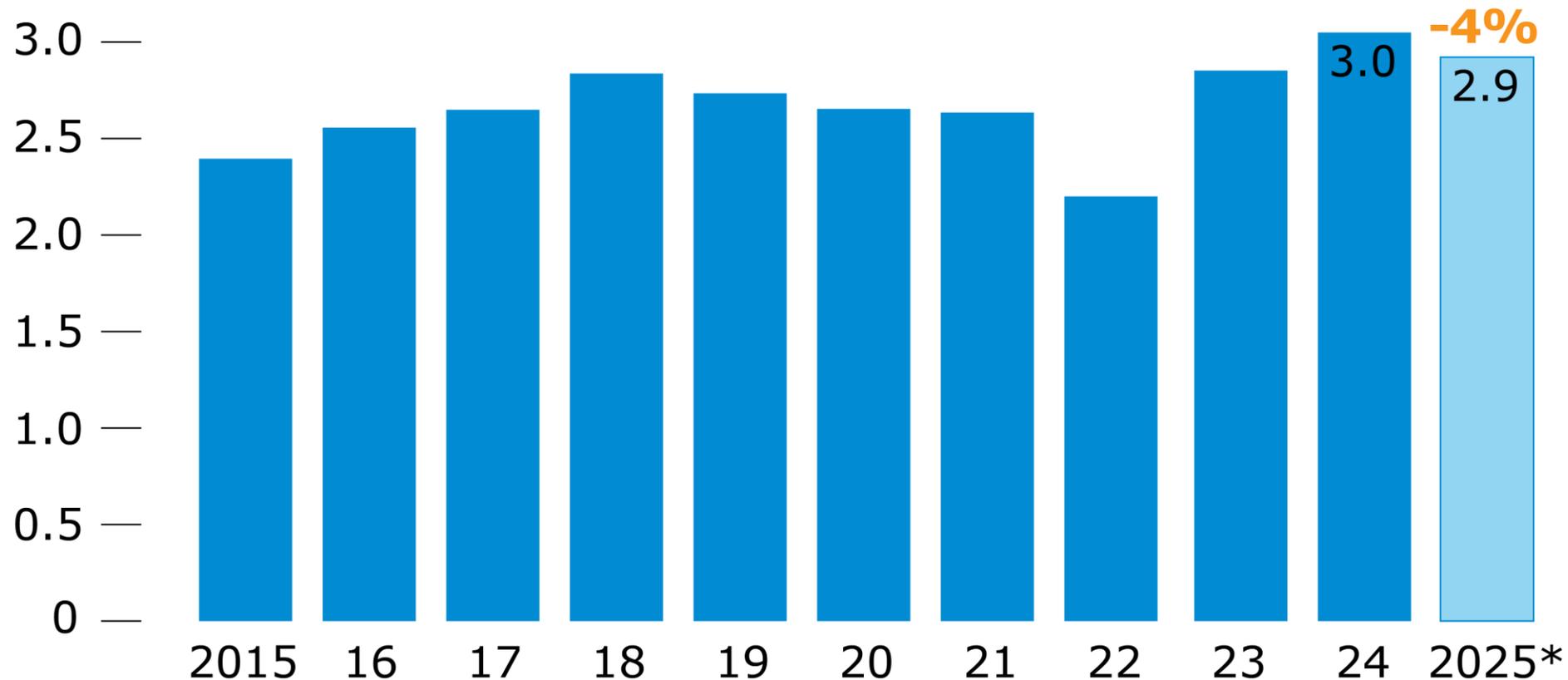
Yield forecast versus average yield

-  below 5y avg.
-  close to 5y avg.
-  above 5y avg.



Soya output in EU-27

million t

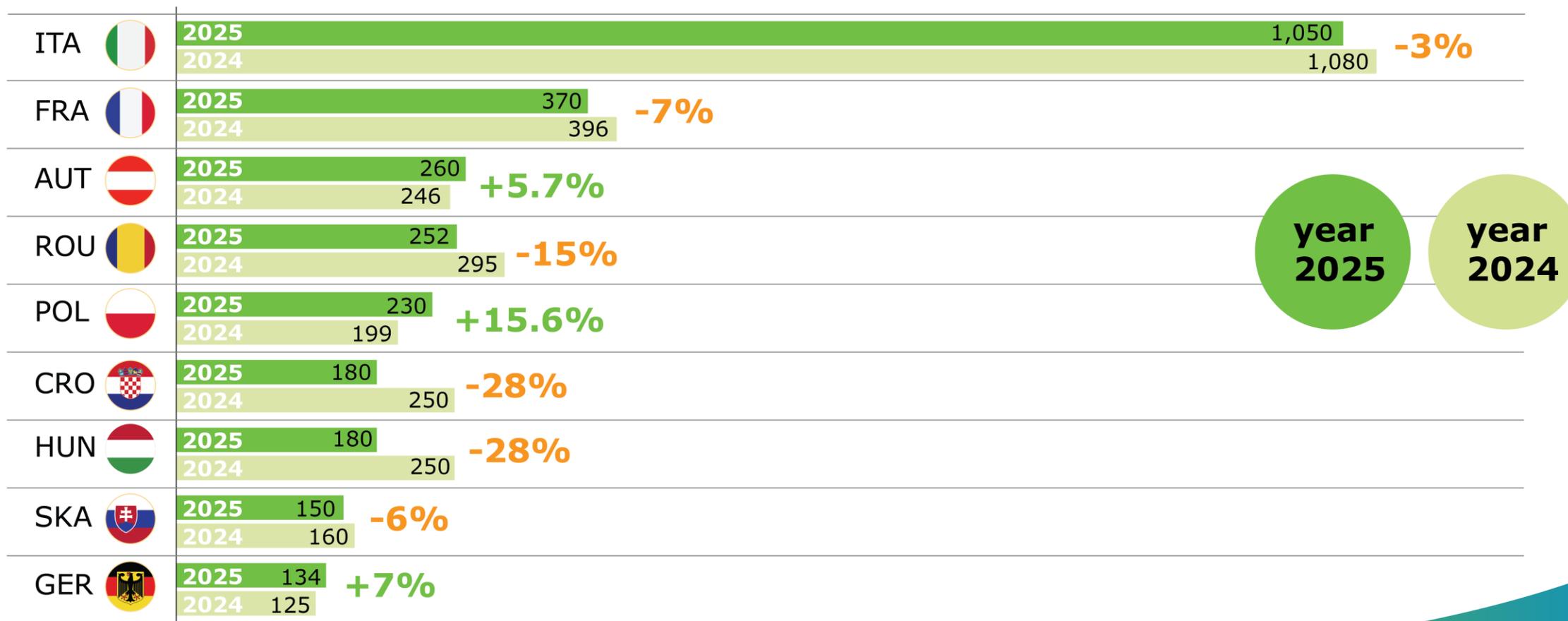


* forecast

Source: Donau Soja

Top soya producers in the EU-27

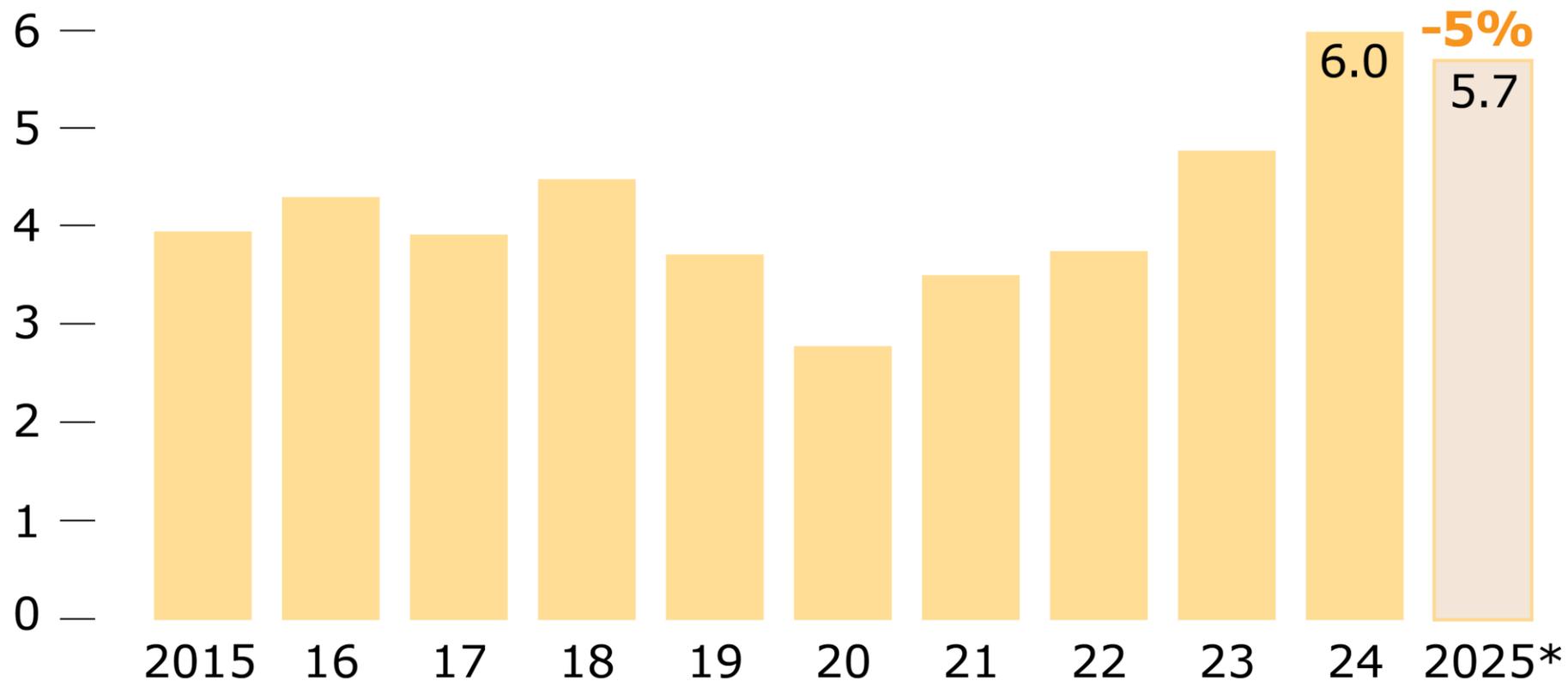
thousand t



Note: values are preliminary estimations for year 2025, Romanian values are based on DG AGRI data
 Source: Donau Soja

Soya output in Ukraine

million t



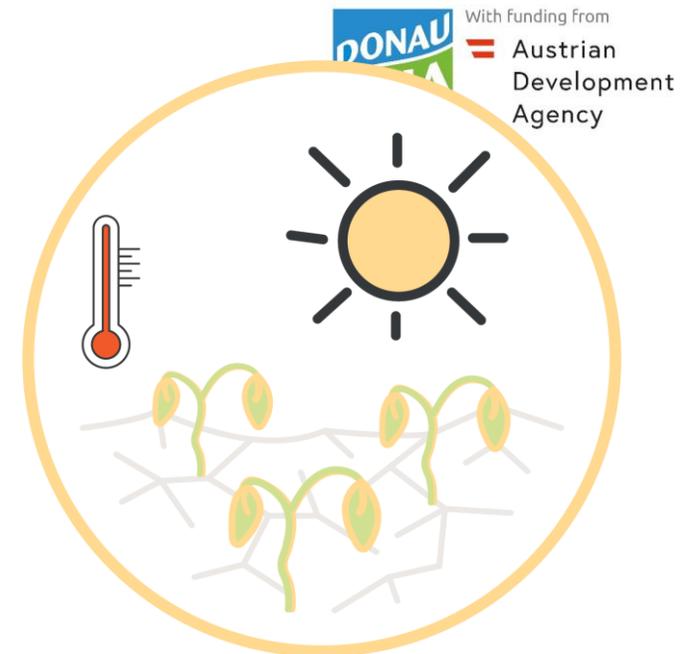
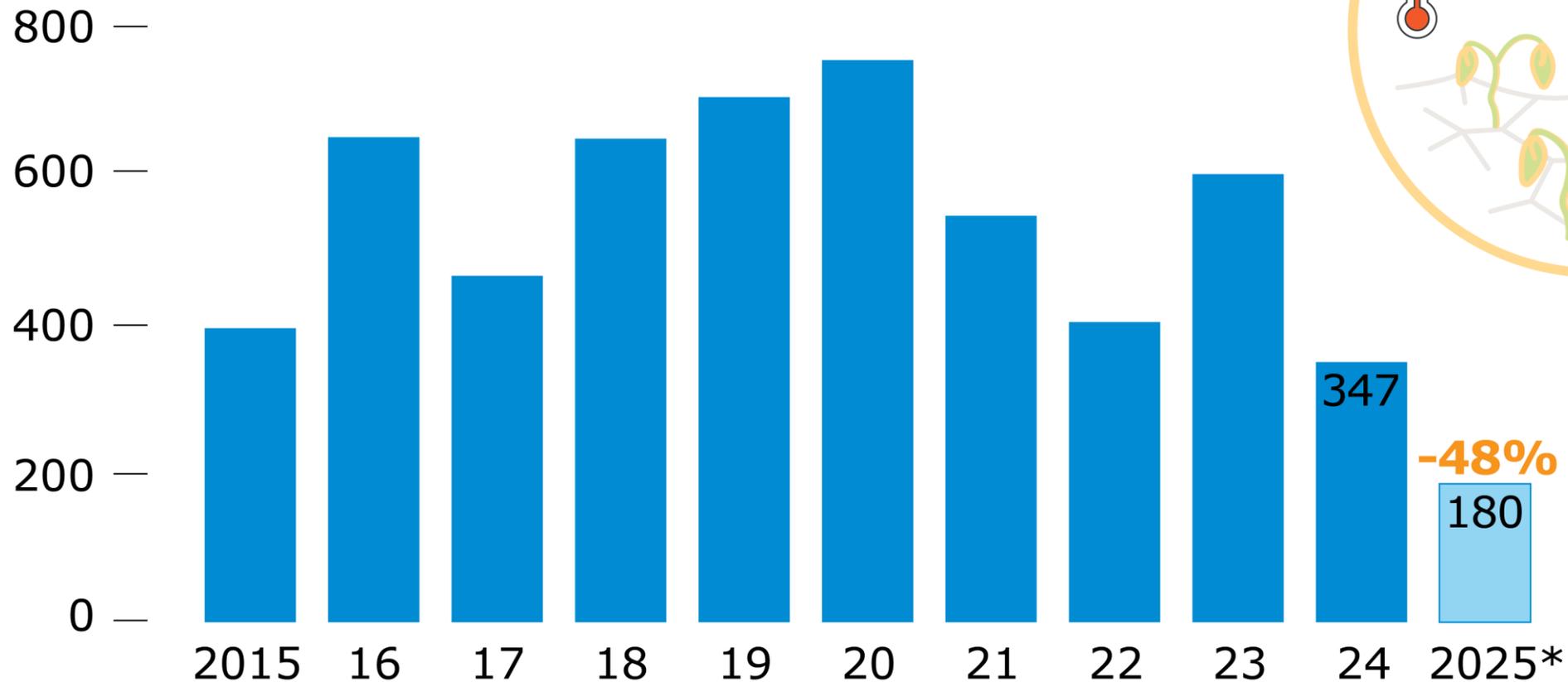
* forecast

Source: Donau Soja

Soya output in Serbia



thousand t

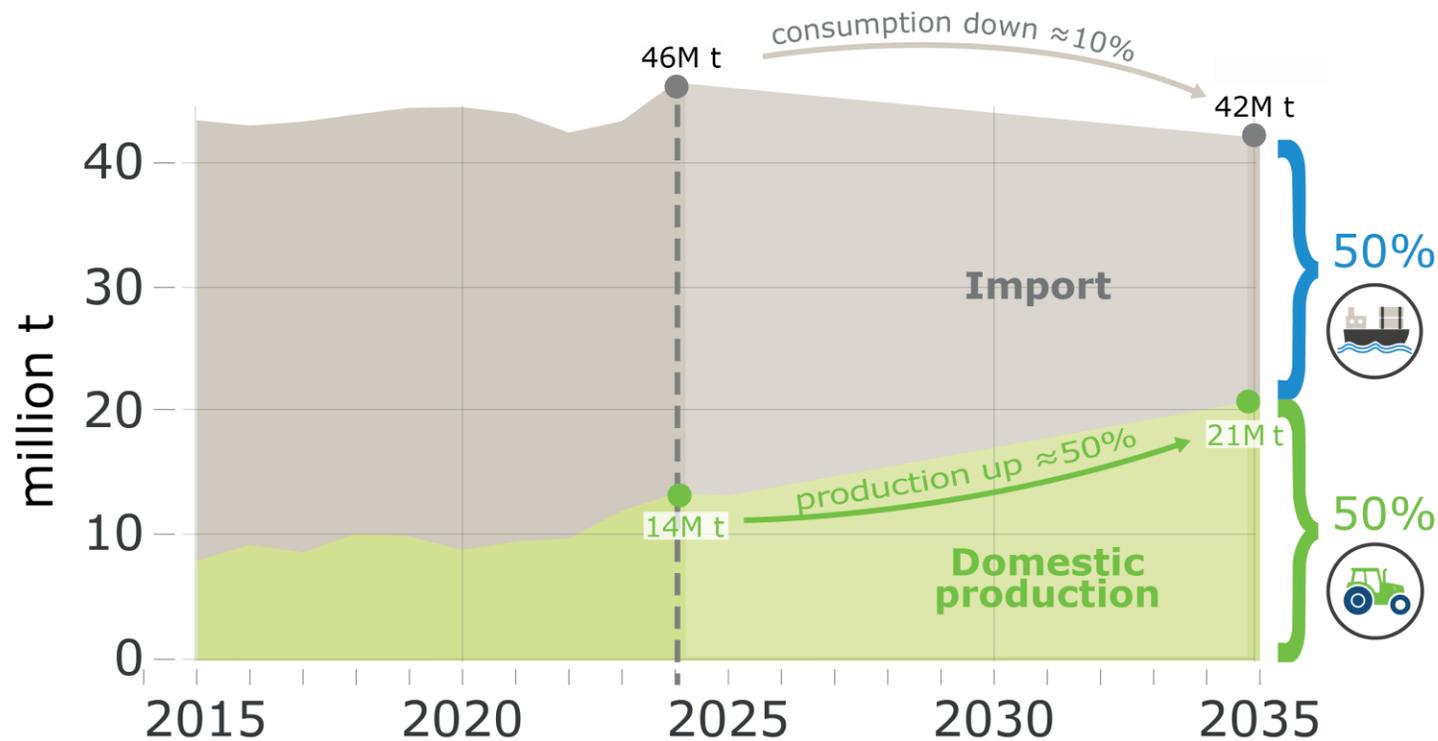


* forecast

Source: Donau Soja

Donau Soja Vision 2035

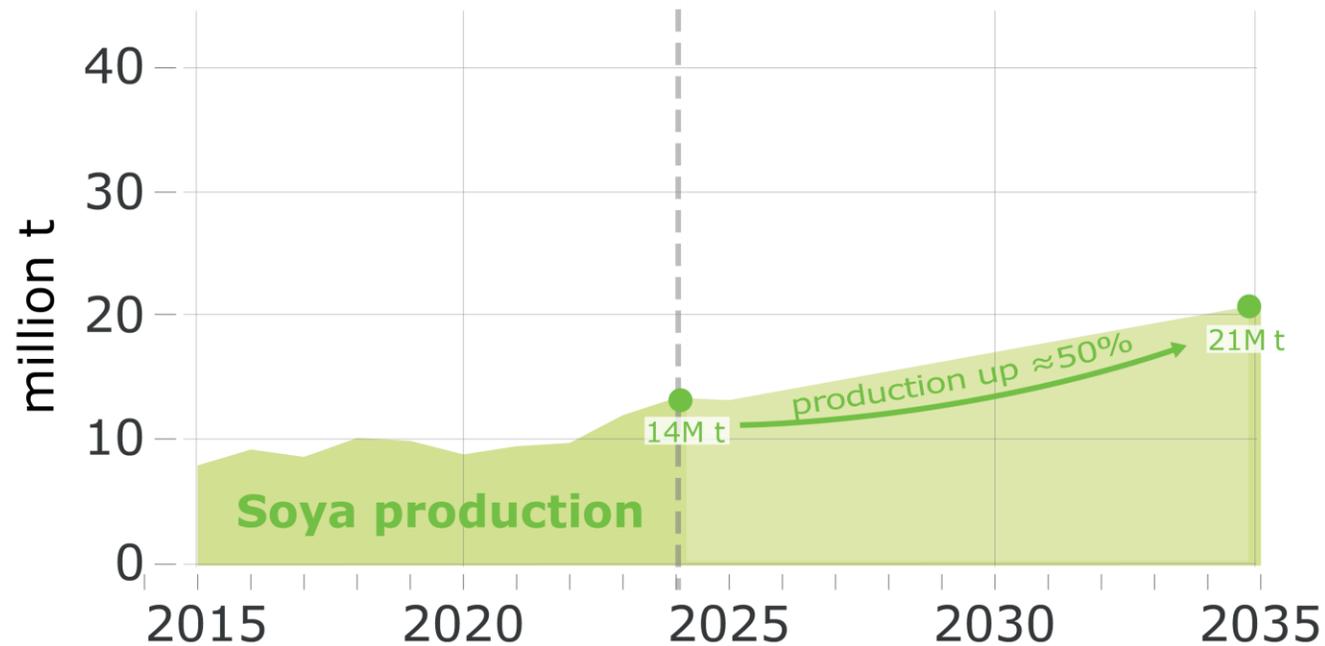
Soya supply and consumption in Europe



Donau Soja Vision
 for 50% self-sufficiency, based on increased European soya production and reduced meat production and consumption

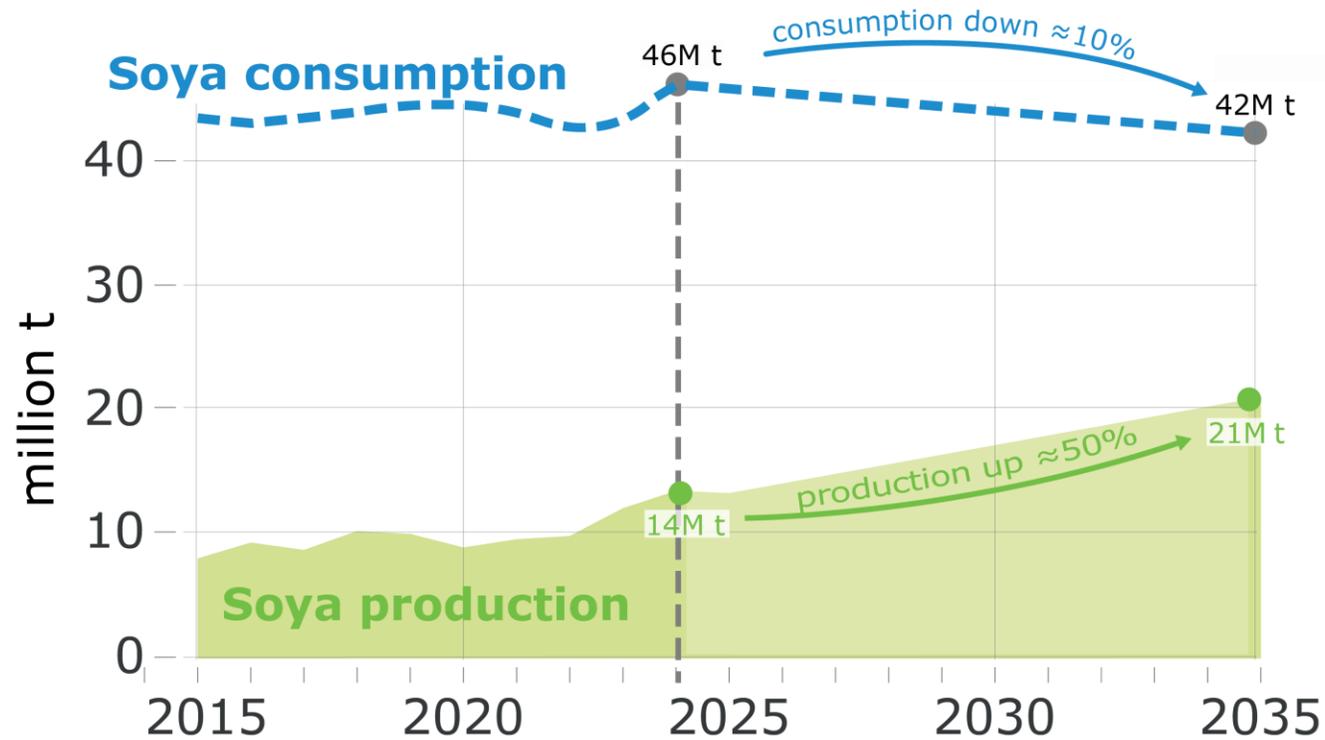
Donau Soja Vision 2035

Soya supply and consumption in Europe



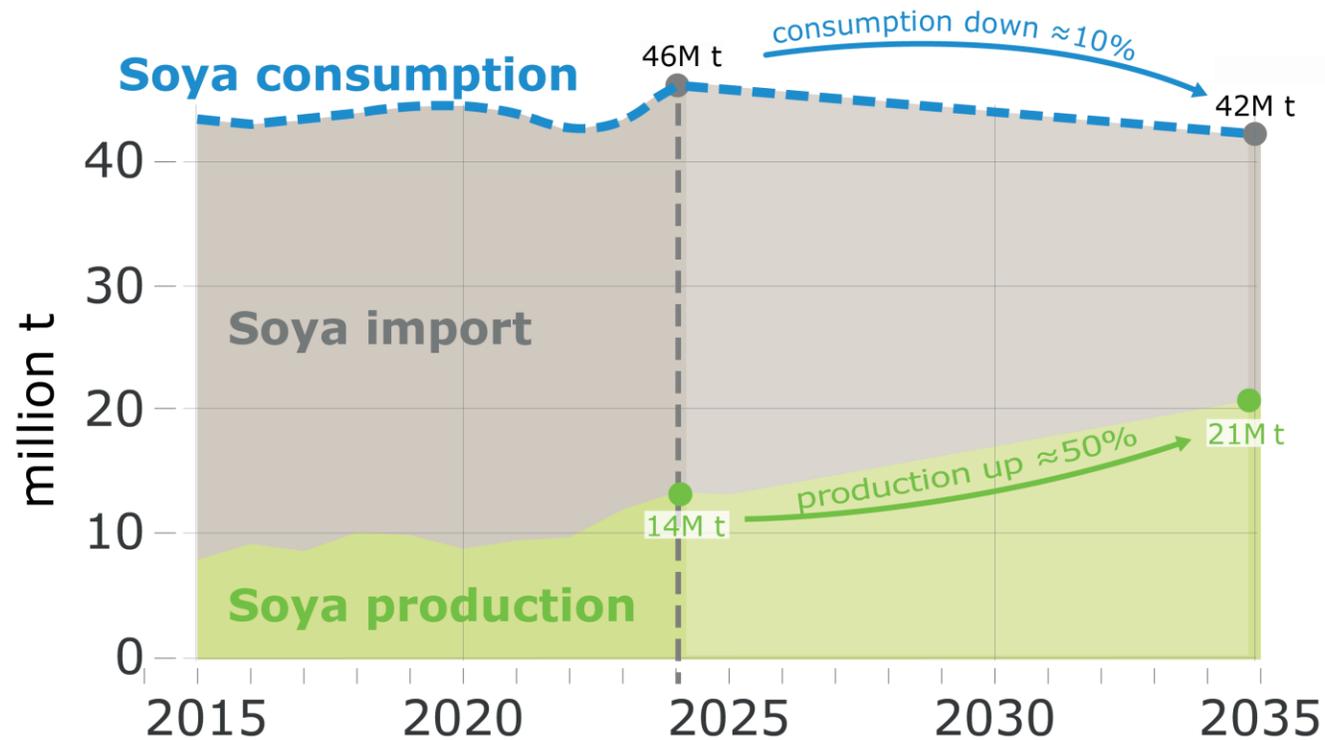
Donau Soja Vision 2035

Soya supply and consumption in Europe



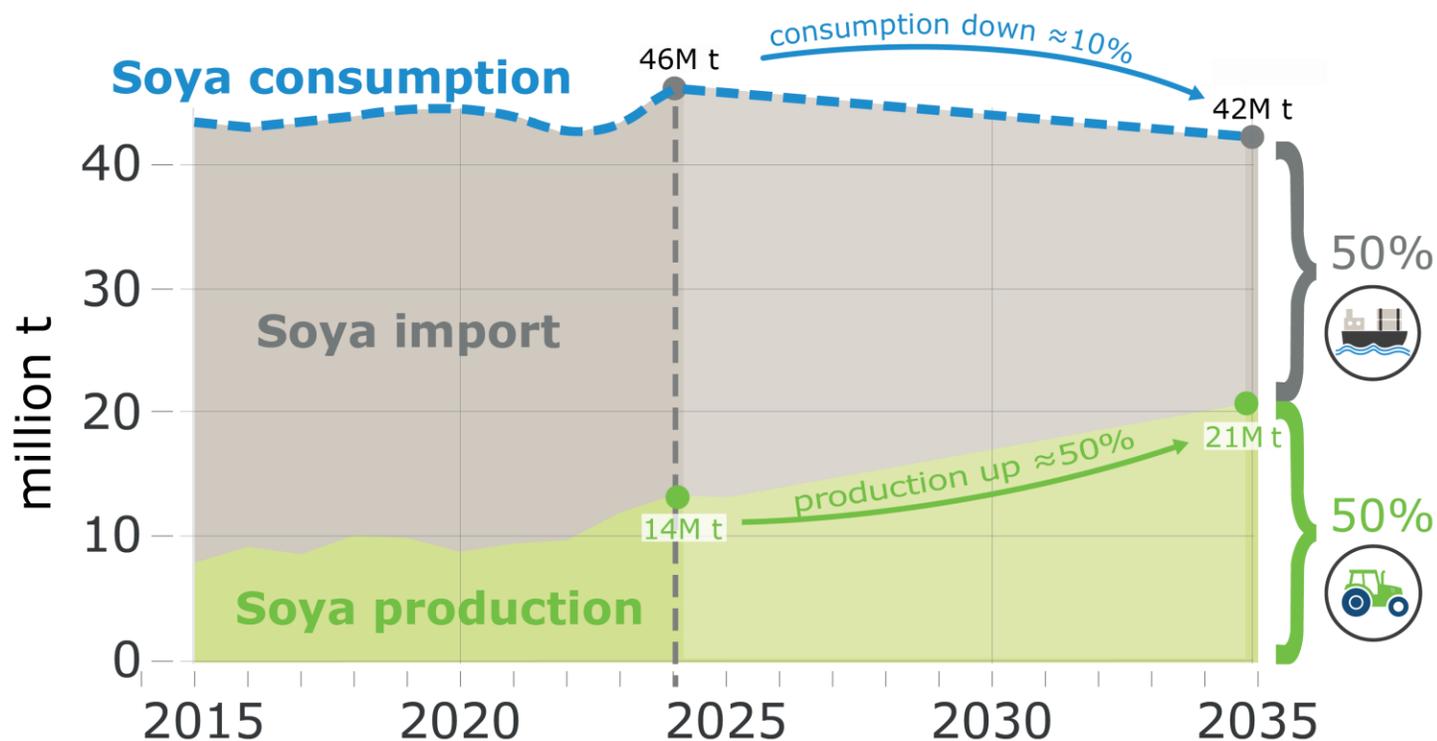
Donau Soja Vision 2035

Soya supply and consumption in Europe



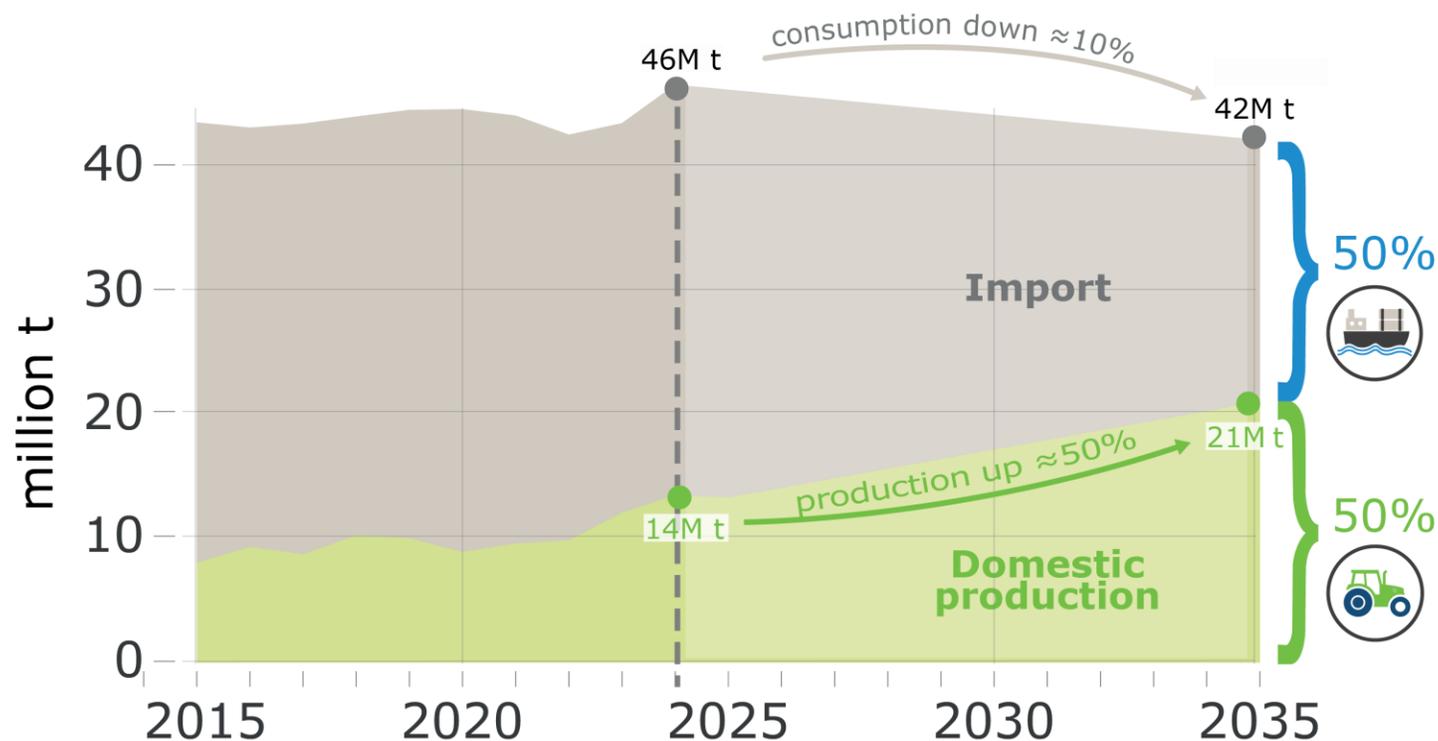
Donau Soja Vision 2035

Soya supply and consumption in Europe



Donau Soja Vision 2035

Soya supply and consumption in Europe

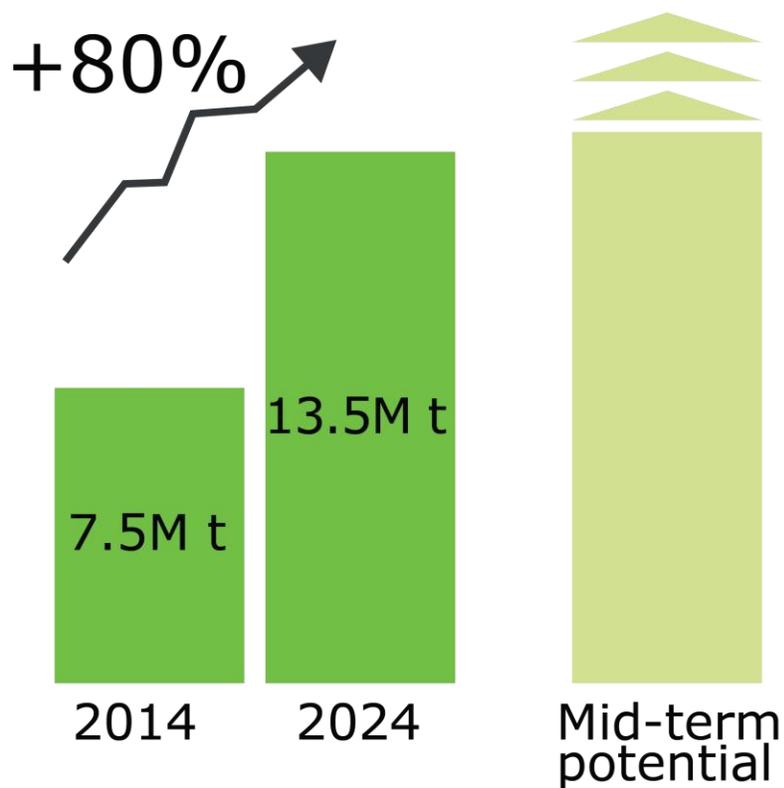


Donau Soja Vision
 for 50% self-sufficiency, based on increased European soya production and reduced meat production and consumption

Soya production in Europe



Soya output in Europe (2014 – 2024):



Driving factors

Economics €

- easy marketing of soya
- high fertilizer/energy costs
- new varieties
- more experience

Sustainability trends

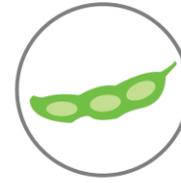
- deforestation-free
- carbon footprint
- regionality
- vegan foods + non-GM

Policies

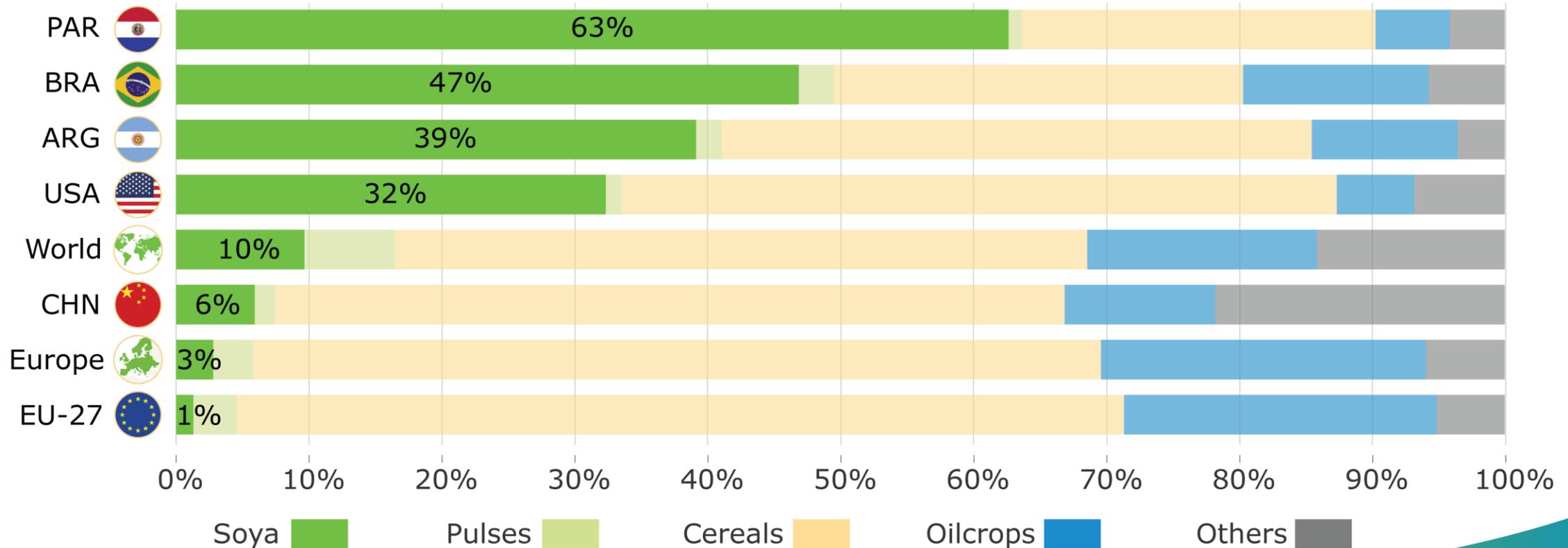
- self-sufficiency
- subsidies
- crop rotation
- crop diversification
- protein strategy

¹it covers only the European part of Russia
 Sources: Donau Soja

Soya share of arable land



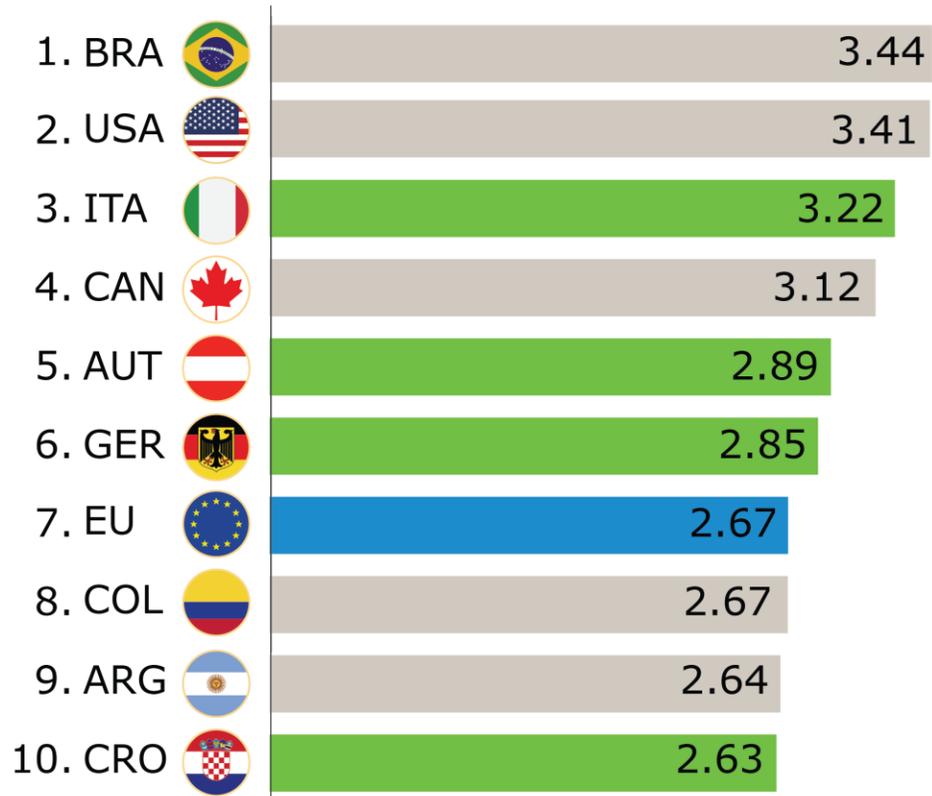
Harvested area of annual crops by selected region/country in 2023:



Note: Europe excludes Russia, "Others" include roots & tubers, vegetables and fibre crops. The graph excludes fruits, tree nuts and sugar crops.
 Sources: Donau Soja based on FAO data

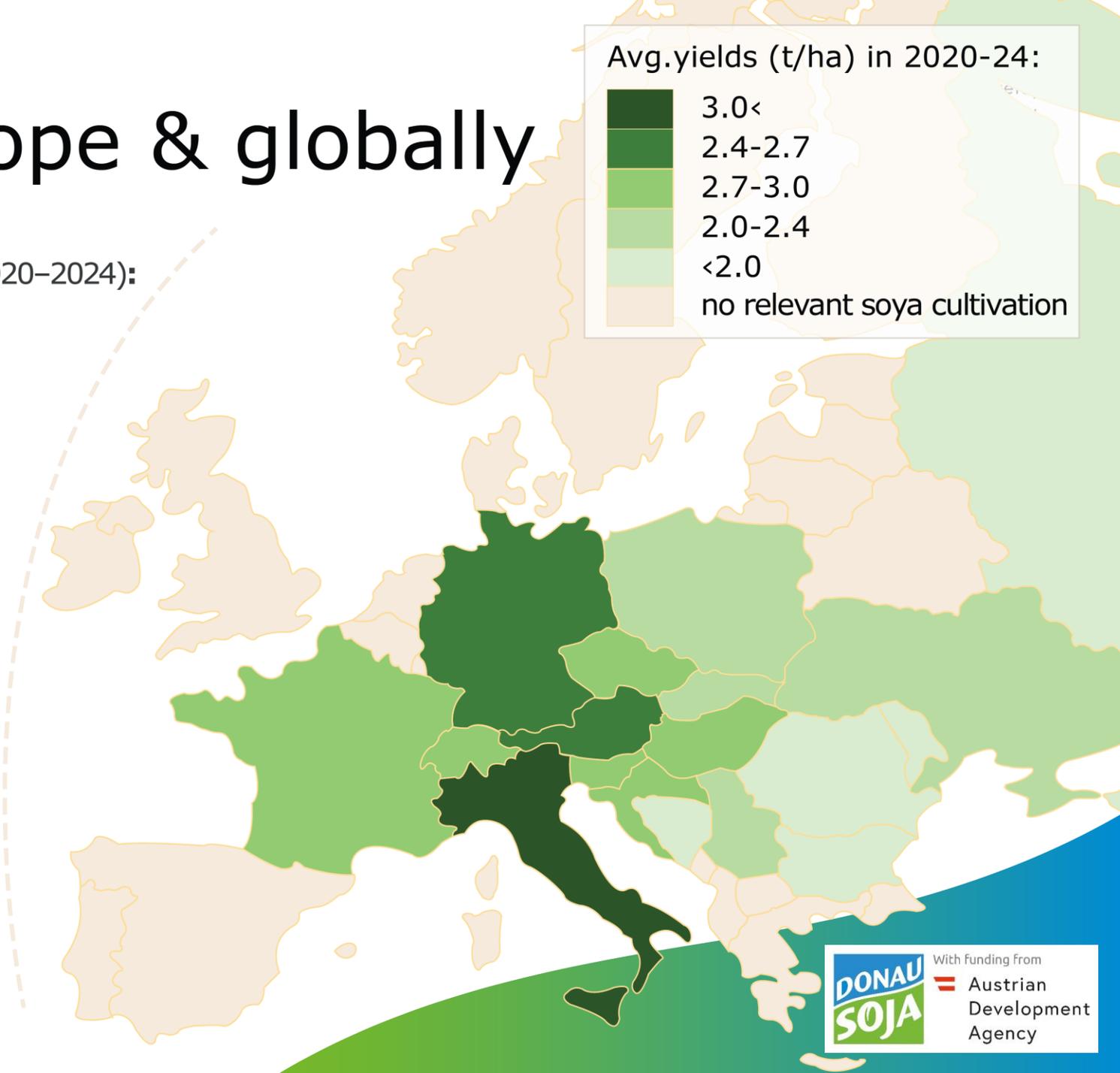
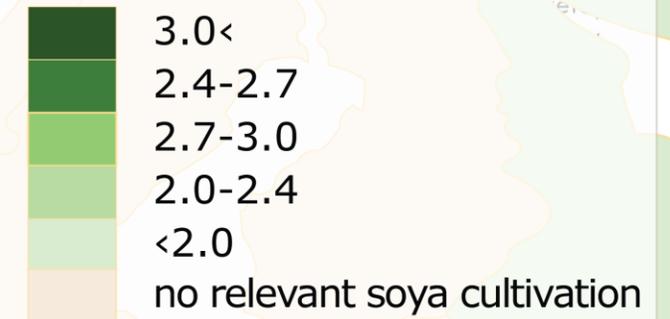
Soya yields in Europe & globally

Top 10 soya yields globally* (t/ha, 5y-avg. 2020–2024):



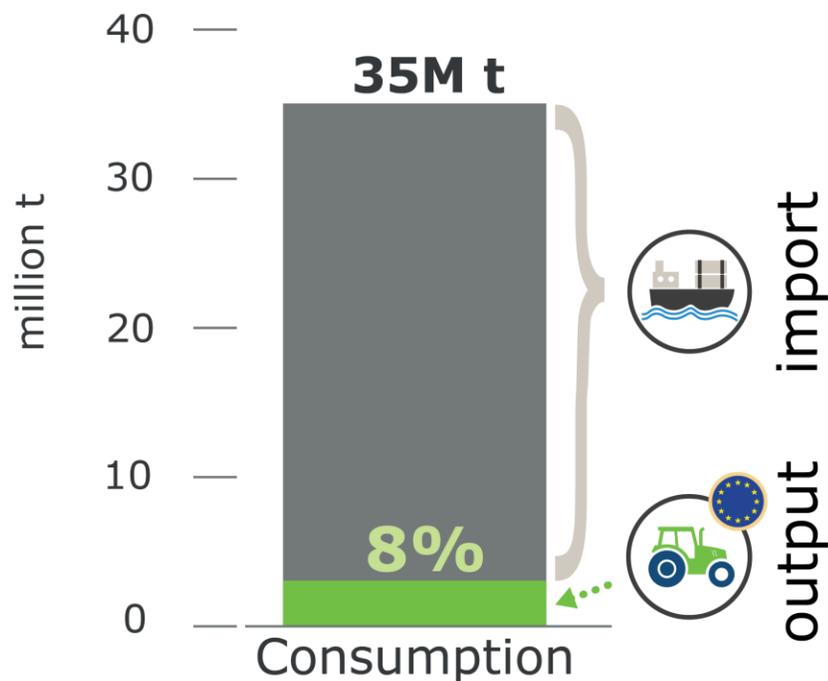
*the bar chart includes countries with minimum 40,000 ha soya area in 2024.
Sources: Donau Soja based on USDA & EUROSTAT yield stats

Avg.yields (t/ha) in 2020-24:

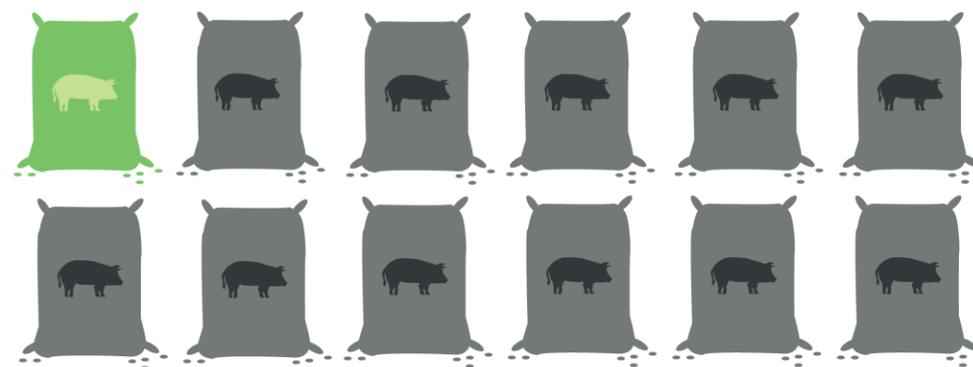


EU soya self-sufficiency (1)

Soya consumption¹ and self-sufficiency² in EU-27 (2024):



Only 8% of soya consumption is covered **by domestic soya production**



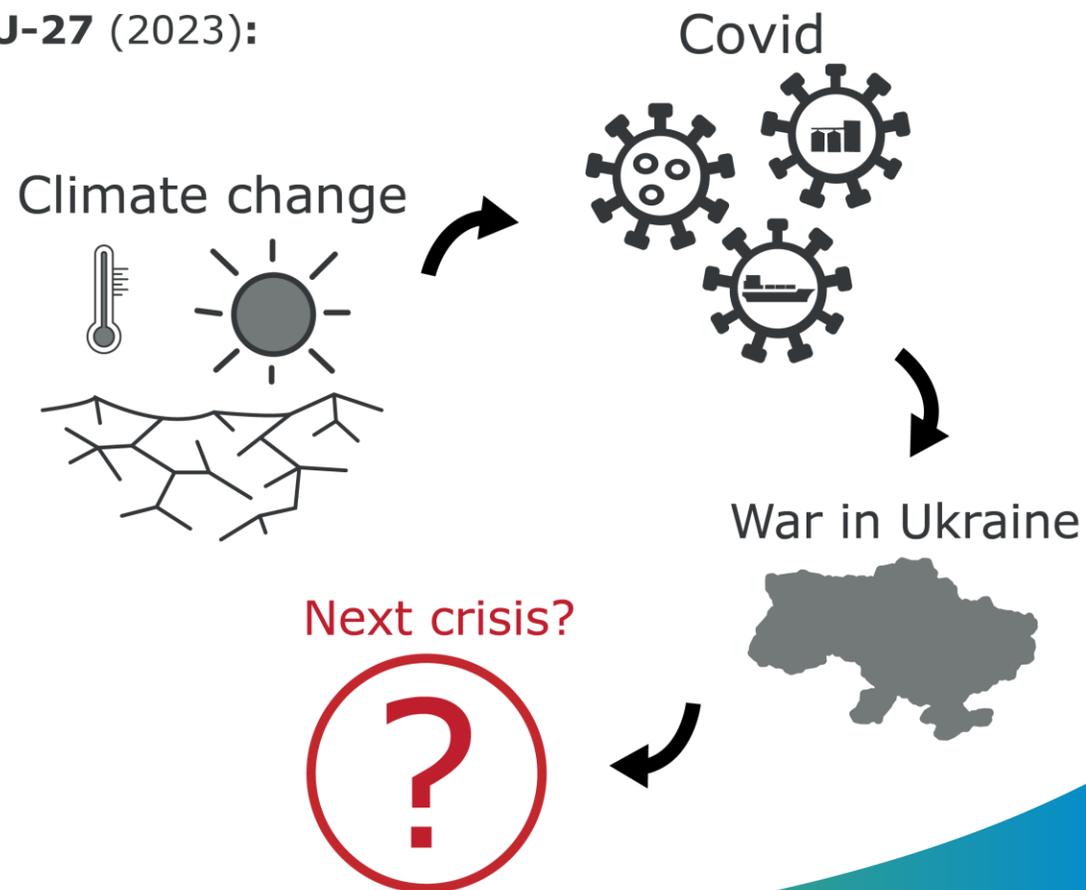
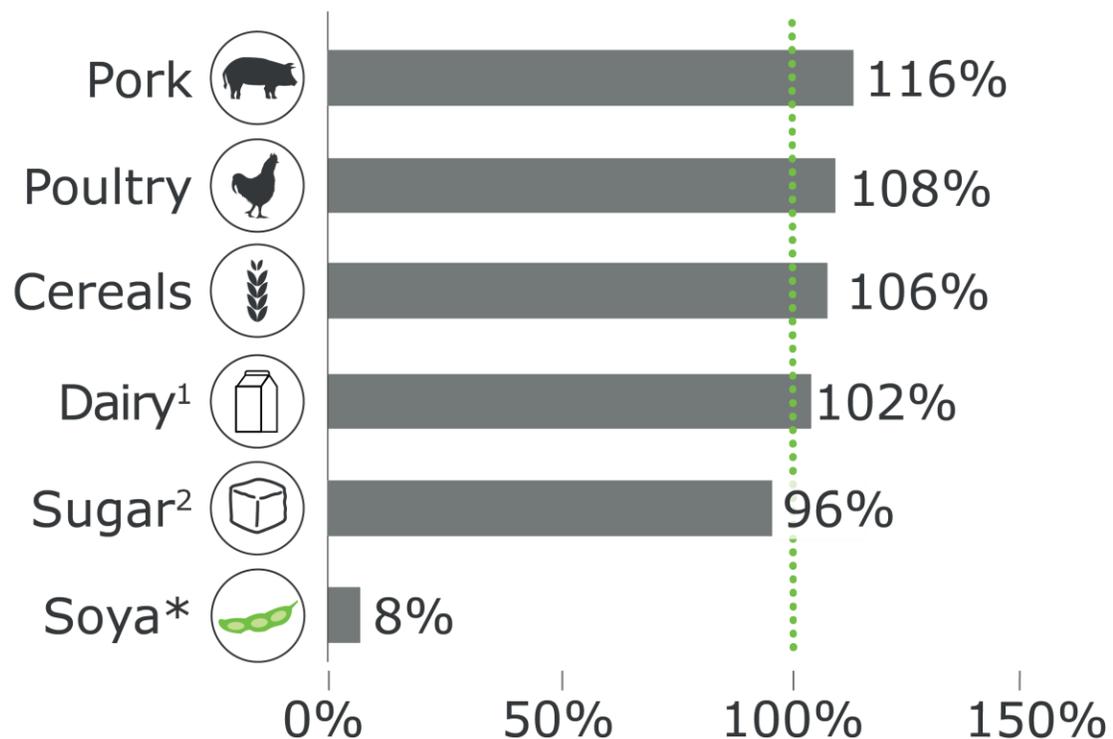
¹ Soya consumption refers to total soymeal consumption in soybean equivalent.

² This ratio shows the extent to which the EU is able to satisfy its domestic demand for soybean meal through domestic soybean production.

Source: Donau Soja based on DG AGRI data

EU soya self-sufficiency (2)

Self-sufficiency ratio* of important agri-products in the EU-27 (2023):



¹ covers only fresh dairy products, namely fresh milk, cream and yogurt ² covers white sugar
 * this ratio shows the extent to which the EU is able to satisfy its domestic demand for soymeal through domestic soybean production.
 Sources: Donau Soja on basis of DG AGRI data

Market reports

Non-GM Soya Market Report



ENGA's Market Report



More info: www.donausoja.org / www.enga.org

E-mail: kruppa@donausoja.org

Development & relevance of Ukrainian soy production



Volodymyr Pugachov

Executive Donau Soja CEE/Ukraine



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Ukraine – 150 years of experience in soya cultivation

1875-1878

Trial sites of Friedrich Haberlandt – western part of Ukraine

1878

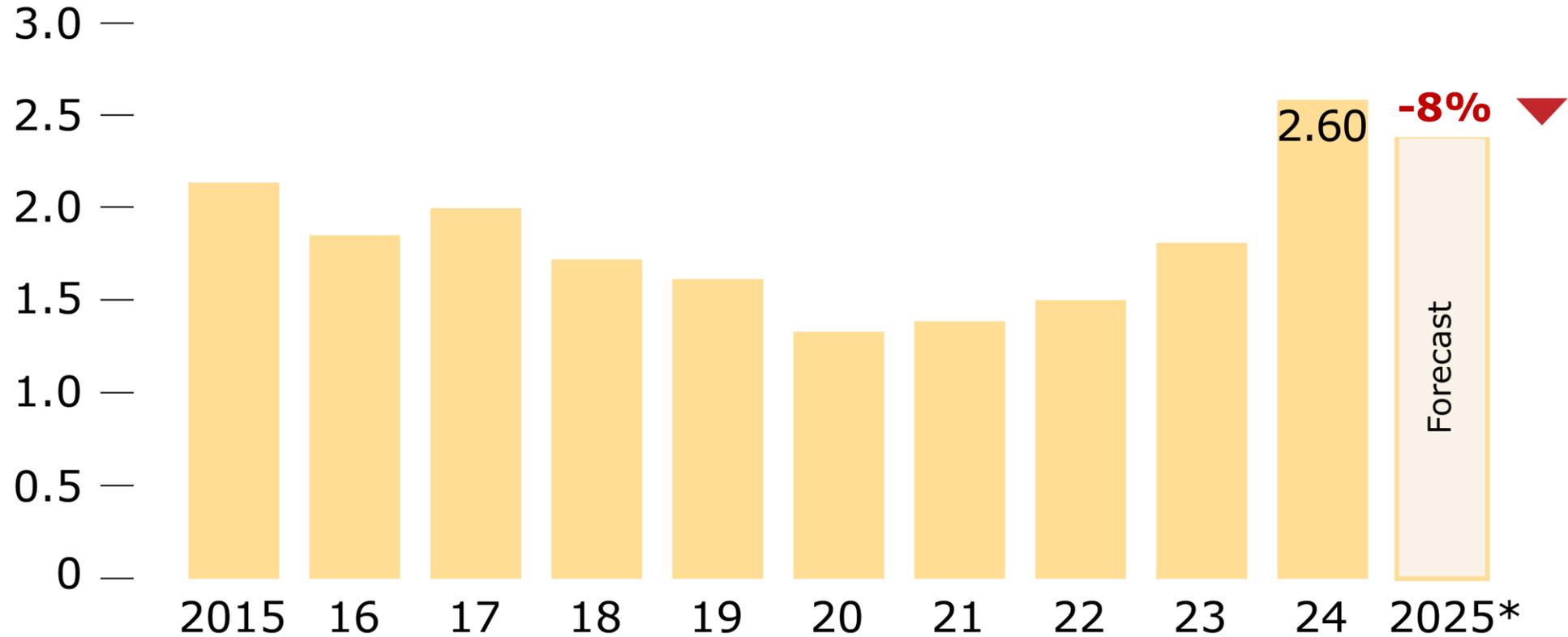
Prof. Haberlandt's magnum opus, Die Sojabohne (The Soybean.) is published in Vienna.

This was the world's first book written entirely about the soybean.



Soya area in Ukraine

million ha



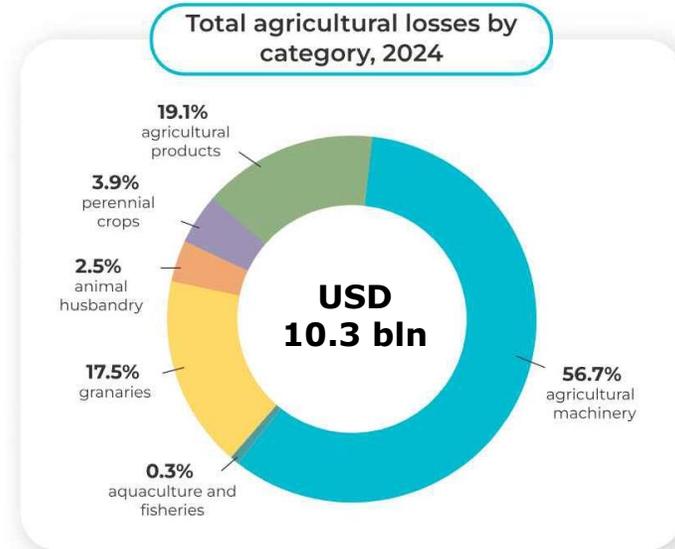
Already harvested: 3.5 mln tonnes

* forecast

Source: Donau Soja

Damages & Losses for Ukrainian agriculture due to the war

Losses due to full-scale invasion

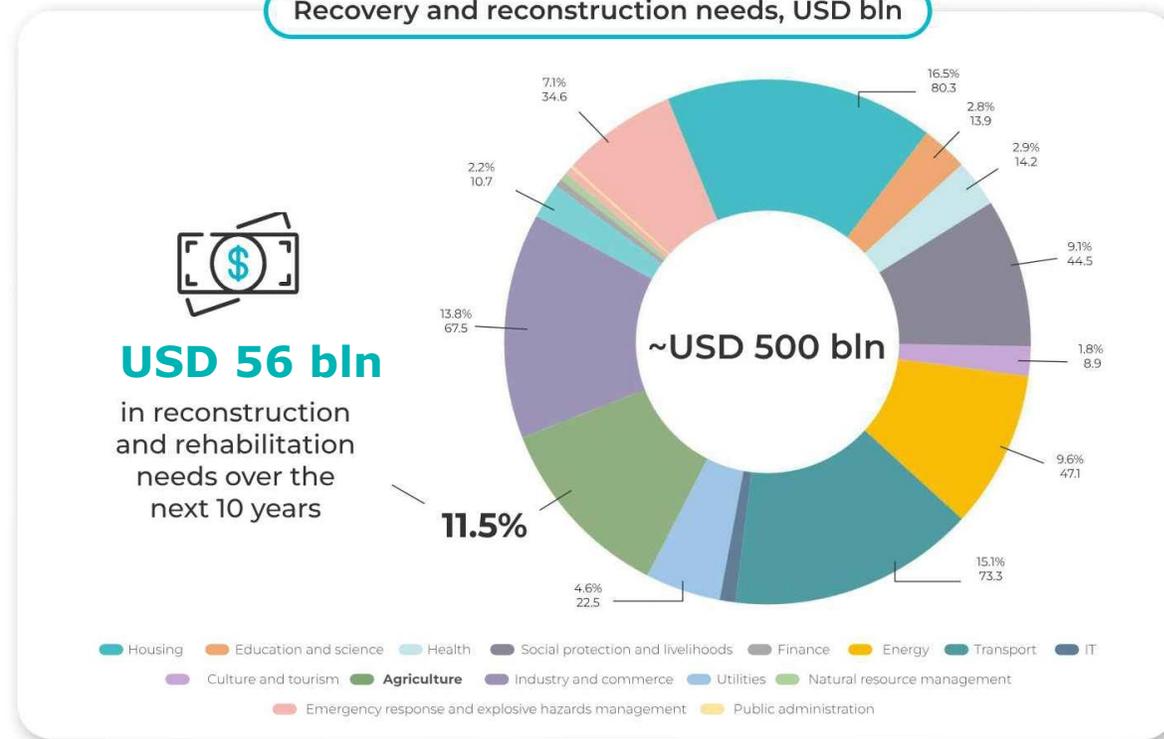


65% of the total losses are in Zaporizhzhia, Kherson and Luhansk regions



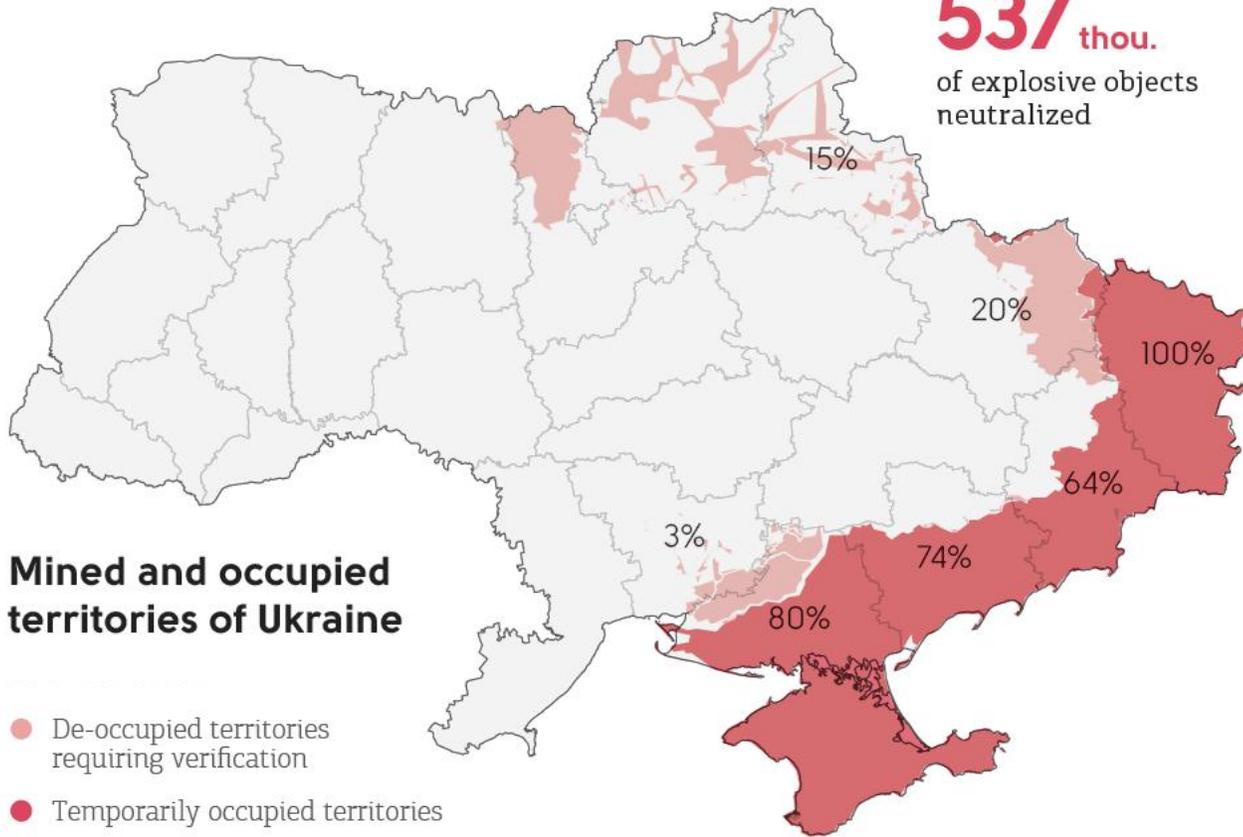
USD 80 bln — losses and damages of the Ukrainian agricultural sector as a result of a full-scale invasion as of 2024

Recovery and reconstruction needs, USD bln



Damage to agricultural land

537 thou.
 of explosive objects
 neutralized



Mined and occupied territories of Ukraine

- De-occupied territories requiring verification
- Temporarily occupied territories

3% Estimated area of the region unavailable for use

The total mined area is accessed on the level of 30% of the territory, where 470,000 ha – for agricultural use.

It was already investigated 285 thousand ha.

500 mln UAH budgeted for compensation of demining costs for farmers in 2024.

1 bln UAH – in 2025.

87 certified mine action operators

Role of smallholders in the agriculture of Ukraine



Around 4 mln of smallholders accounted.



They are rural families consisting of 2-3 persons.



Cultivate around 14.3% of arable land and produce up to 12.5% of agricultural goods (data of 2021, further assessment is necessary due to the war).



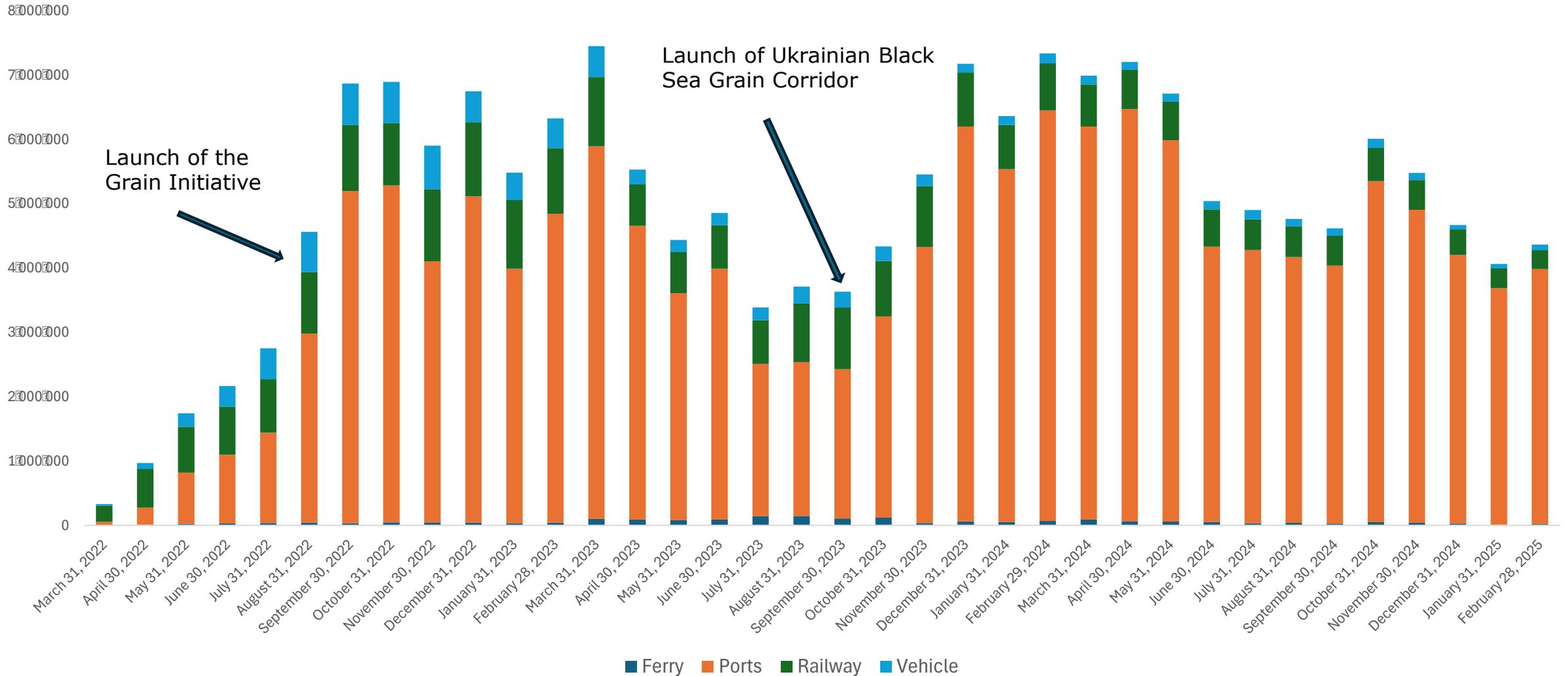
There's a strong need to integrate into the agri-food value chains and implement sustainable cultivation practices – EU support is crucial.



FAO assessed damages and losses for small-scale crop and livestock producers exceed \$ 3.85 billion (survey published in 2023).



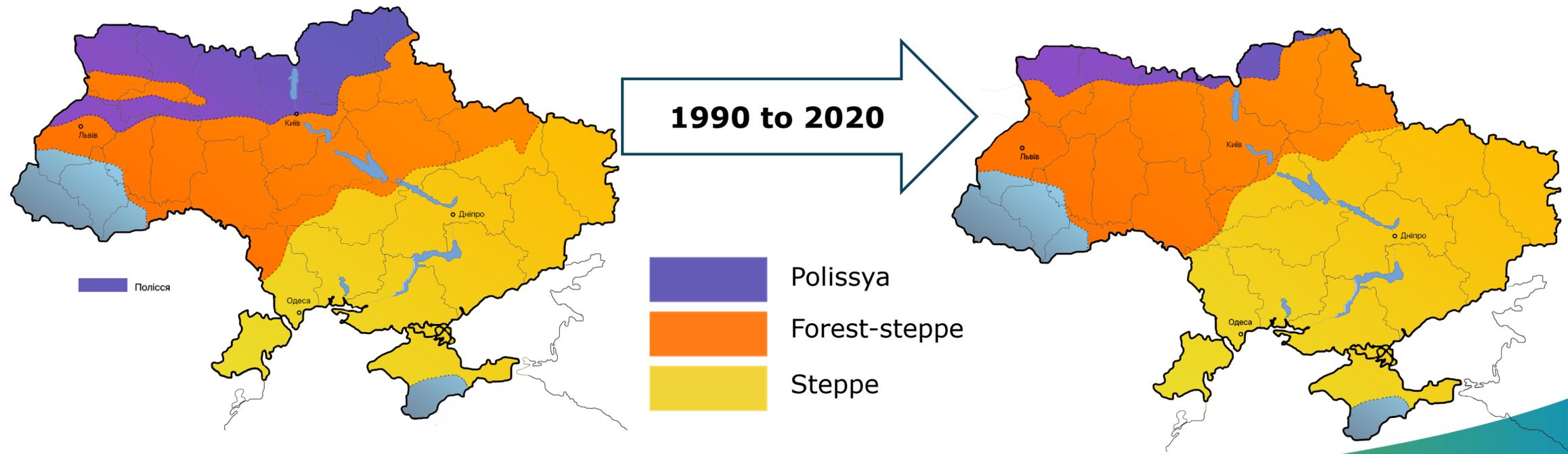
Importance of the Black Sea



Climate change in Ukraine

The climate conditions in Ukraine changed significantly for the last 30 years. For e.g. seasons 2020 and 2021 were especially untypical:

- dry season 2020 with scarcity of rain resulted in the **harvest loss of around 14%;**
- untypical weather conditions during harvesting 2025 – nearly a month of **consequent heavy rains.**



data source: Hydrometeorological Centre Ukraine

Protein Partnership Programme

Donau Soja Protein Partnership Programme enables agricultural producers to certify soybeans for compliance with EU sustainability criteria for free:

- ✓ Deforestation and Conversion-free status (cut-off-date 2008)
- ✓ Traceability and segregation
- ✓ Legality of production
- ✓ Non-GM



Protein Partnership Programme

Number of partners & countries



The program has covered over **1.6 million tonnes** of non-GM soybeans in Ukraine the past 3 years (25% of all non-GM soya in UA).

Farm inspections are included, which allowed for the **deforestation and conversion-free verification** in 2023, 2024, and 2025.

Sponsors of the programme



etc.

Donau Soja Academy



A primary focus of the Academy is to advance the agronomy of protein crops, particularly soybeans.

In **5 major soy producing countries** in Eastern Europe

Includes **trainings, field trials, webinars** and other activities specially adapted to the specific needs and challenges of different regions.

Supported by Protein Partnership Programme and the Austrian Development Agency.

Agri-climatic Atlas for soya cultivation in Ukraine

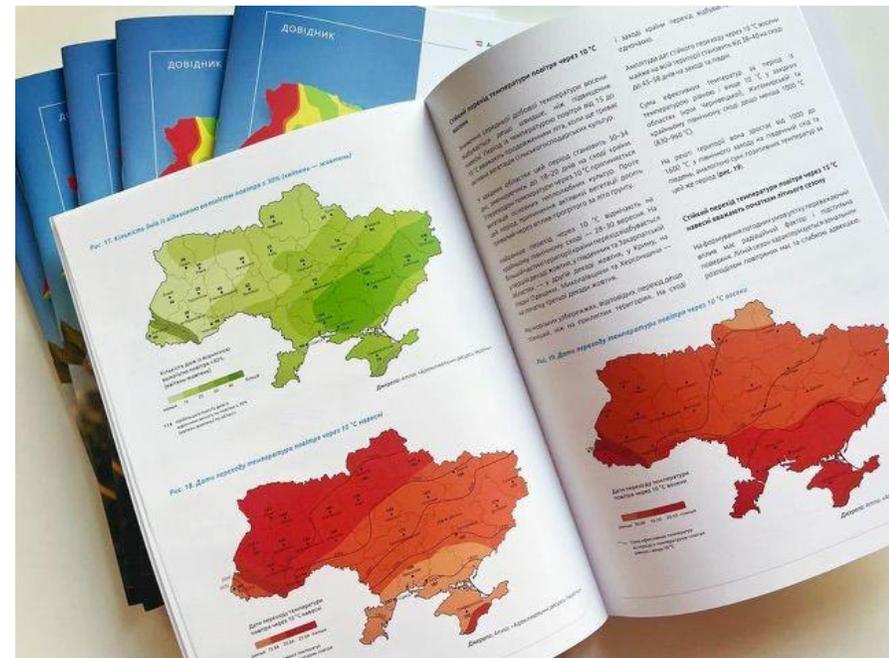
Agri Climate Atlas provides comprehensive information on climate change, its impacts, and potential adaptation measures in the soya production in Ukraine.

The Atlas includes data and information on:

- climate projections;
- soya suitability and soil characteristics;
- water resources.

This is helpful for soya farmers to make informed decisions about variety selection, irrigation, and pest management, among others.

We're excited about the potential of Atlas to help Ukraine's soya farmers and policymakers to adapt to the issues of climate change.



Monitoring changes in land use and deforestation

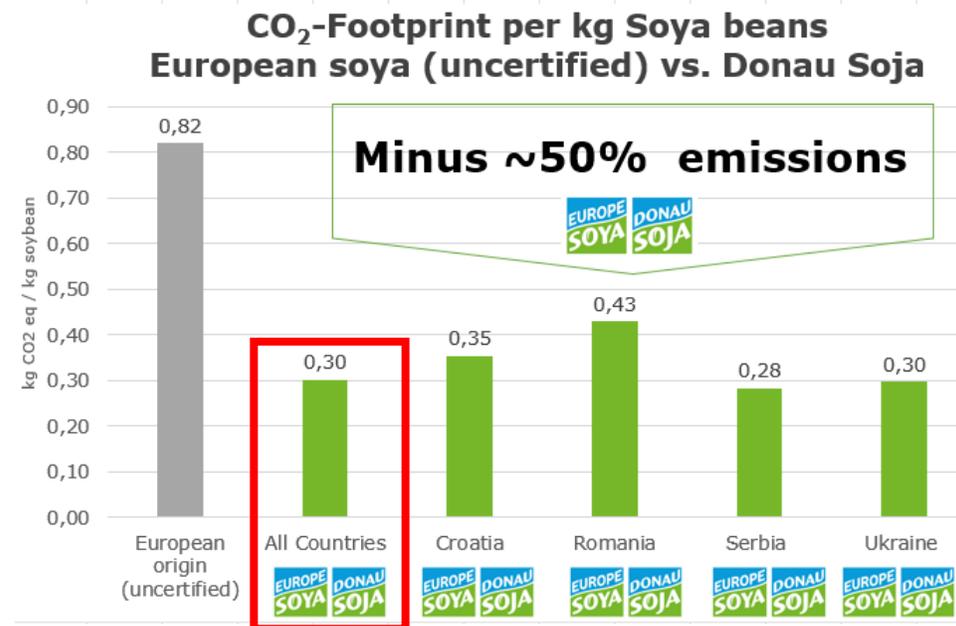
Areas 2023 + 2024 + 2025 (soya)

- 1) Collection of geodata during farm audits;
- 2) Remote sensing: Landsat 5, Sentinel 2;
- 3) Surveyed area:
approximately 250,000 hectares (2023)
and 330,000 hectares (2024);
- 4) Conclusions and reports in 2024 and 2025 (under development)



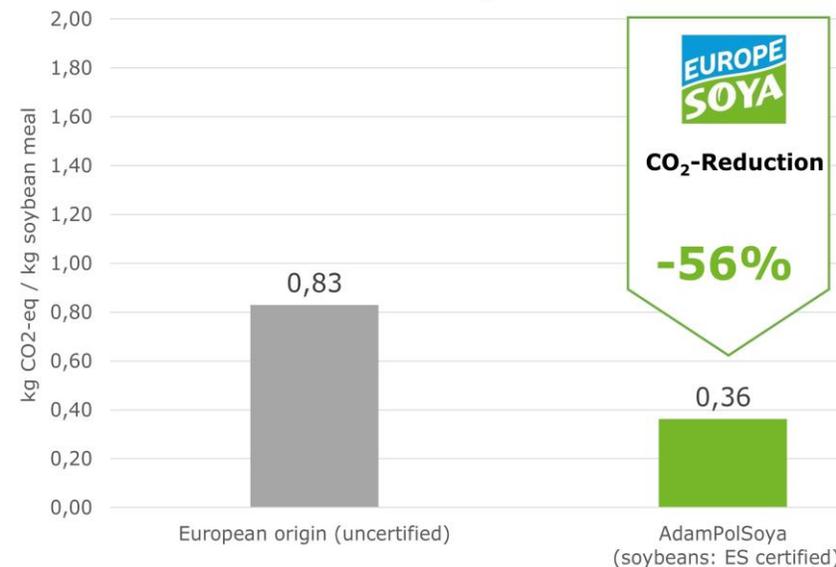
CO₂-Reduction for soybeans with Donau Soja

The latest Donau Soja CO₂-values (Blonk 2024, red box) can be used for all Donau Soja volumes, independent of cultivation country. This simplifies carbon footprint calculations & goal setting.



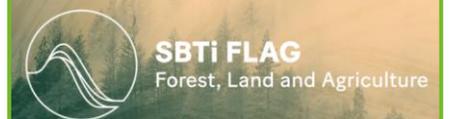
Source: Agrifootprint 5.0.; Blonk Consultants, 2022 + 2024

CO₂-Footprint per kg soyabean meal
European soya (uncertified) vs Donau Soja



Source: GFLI, 2022 and FiBL, 2023

- DS/ES CO₂ data available as „branded datasets“ in recognised databases
- In SBTi FLAG format



Thank you!

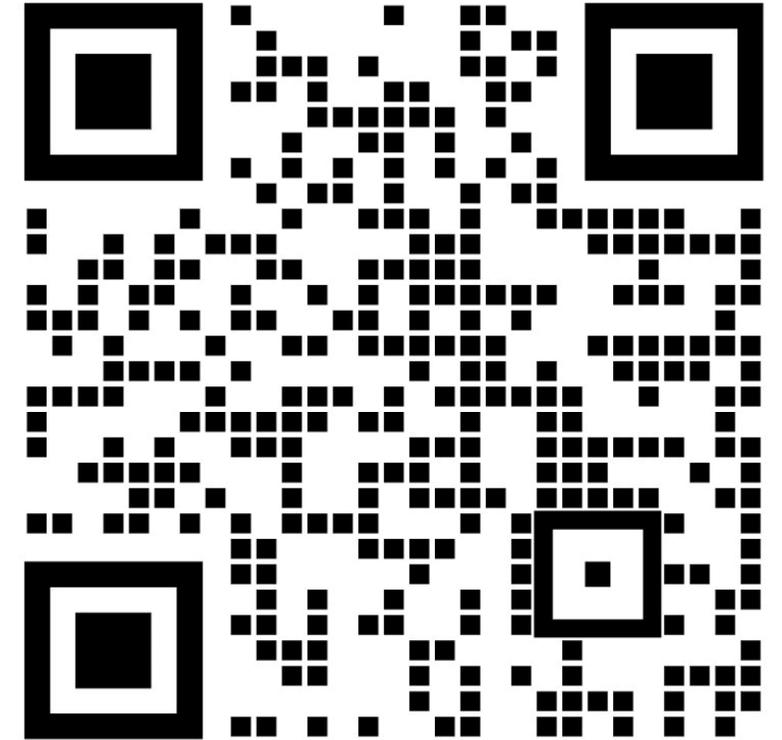


Volodymyr Pugachov, Ph.D.

Executive Director of Donau Soja in Eastern Europe

Deputy head of the agricultural committee of the Ukrainian Chamber of Commerce and Trade

Certified export consultant



Business and Climate Change:
Towards Net Zero, Cambridge
Institute for Sustainability Leadership
(CISL)



Sustainability: Strategies and
Opportunities for Industry,
Massachusetts Institute of
Technology (MIT)



Thank you so far. Now it's time for your questions!

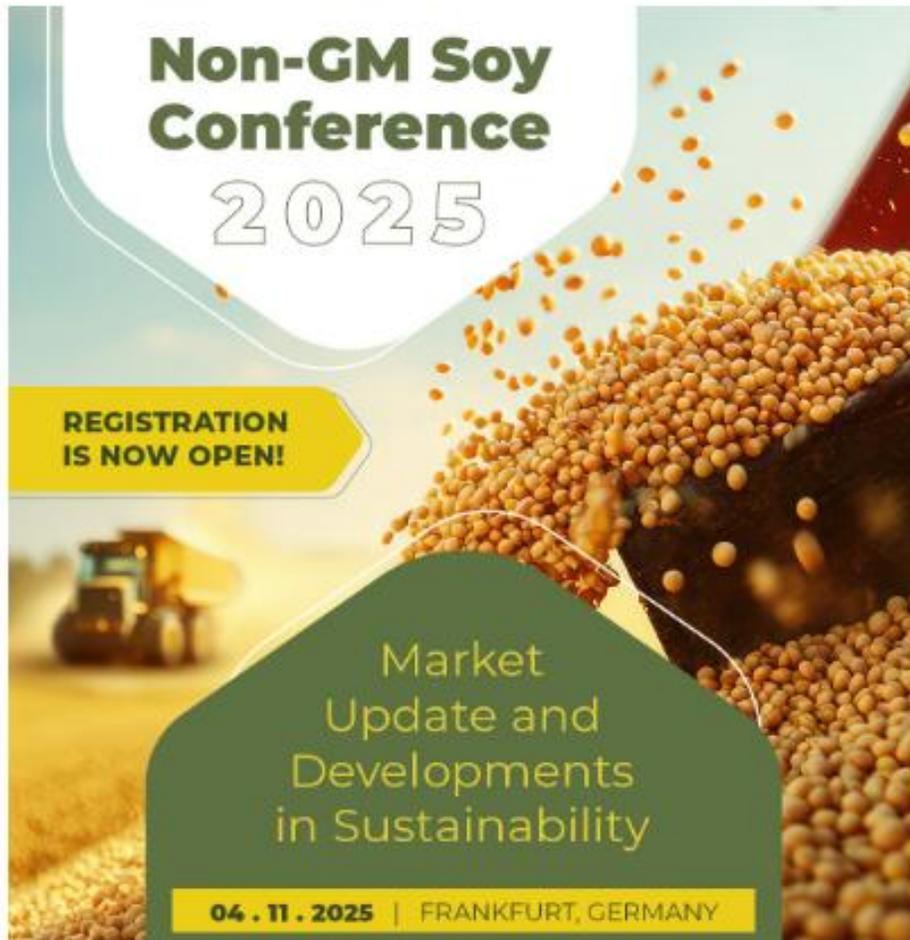


Please use the chat function to ask your questions.

Take-away

- European soya – on the rise for the last 15 years, but on a very low level
→ still only 8 % (EU) or 25 % (Europe) self-sufficiency
- Urgent need for a truly European Protein Strategy
- Strengthen EU's collaboration with neighbouring countries
- Pay attention to create better level playing field for (EU) farmers
→ support programmes like Protein Partnerships in Ukraine
- Create awareness of the relevance of sustainable soy production (Donau Soja/Europe Soya standards) for reducing CO₂ emissions

Invitation



NON-GM SOY CONFERENCE 2025 4 Nov 2025 Frankfurt, Germany

- The event will provide valuable insights into regulatory developments, sustainability standards & global non-GMO availability.
- Expert panel discussion on the balance between real impact & marketing in sustainable business.
- nongmomarket.com

Thank You



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