

*LOCAL SOYBEAN SUPPLY CHAIN*  
**APPROVISIONNEMENT LOCAL EN SOJA**

## Danube Soya – Improving European GM-free soya supply for food and feed

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**Abstract** – The Danube Soya Association is an international, voluntary, non-profit, non-governmental association promoting sustainable and GMO\*\* -free soya production along the Danube River Basin – from Switzerland to the Black Sea. Founded in 2012 the association counts today more than 200 members from the whole value chain and civil society in 16 European countries. The members share the vision of a protein transition towards more European and more sustainable protein sources for food and feed. The Danube Area is an area of large potential agricultural surpluses and Danube Soya promotes the idea of using these surpluses to replace a part of the imported soya. The goals of the association are to increase value-added in the rural economies of Central Eastern Europe, promote European cooperation as well as a production of constant and sustainable local soya sources. The Danube Soya Association runs a certification scheme that reaches from soya seeds all the way to final products, which can be labelled with the consumer label “Fed with Danube Soya” (for animal products) and “Danube Soya” (for soya food products). Together with its partners, the Danube Soya Association implements and supports dissemination and research projects on different topics.

**Keywords:** Soybean / GM-free / certification / supply chain

**Résumé** – Soja Danube, une initiative pour améliorer l’approvisionnement européen en soja non OGM pour l’alimentation humaine et animale. Soja Danube est une association internationale à but non lucratif non gouvernementale qui a pour objet de promouvoir la production durable de soja non OGM\*\*\* dans le bassin du Danube, depuis la Suisse jusqu’à la Mer Noire. Créée en 2012, cette association compte aujourd’hui plus de 200 membres issus de la filière soja et de la société civile dans 16 pays européens. Les membres de l’association partagent la vision d’une transition protéique basée sur un approvisionnement en sources protéiques plus européen et plus durable que ce soit pour l’alimentation humaine comme pour l’alimentation animale. Les régions ou/et pays bordant le Danube offrent en effet un potentiel de production agricole excédentaire actuellement destiné à l’exportation que Soja Danube propose de substituer par une production locale de soja à même de remplacer une partie du soja importé. Le but de l’association est de créer de la valeur ajoutée dans les économies rurales du Centre et de l’est de l’Europe, de promouvoir la coopération européenne ainsi que la production durable et régulière de soja local. L’association Soja Danube a mis en place un système de certification qui couvre la chaîne de production depuis les semences de soja jusqu’aux produits finaux qui peuvent alors être labélisés « Nourris avec du Soja Danube » si ce sont des produits animaux et « Danube Soja » pour des aliments au soja. L’association Soja Danube et ses partenaires mettent aussi en œuvre et soutiennent des projets de recherche et développement sur diverses thématiques.

**Mots clés :** Soja / non OGM / certification / approvisionnement

### 1 Introduction

Danube Soya is an international, voluntary, non-profit, non-governmental association promoting sustainable and GMO<sup>1</sup>-free soya production along the Danube River Basin –

from Switzerland to the Black Sea. Founded in 2012 the association counts today more than 200 members from the whole value chain and civil society in 14 European countries. Thirteen governments in the Danube Region have signed the Danube Soya Declaration, supporting the development of the initiative.

Imports of about equivalent 16 Million hectares of soya to Europe causes major problems in oversea countries. Furthermore more and more GM-soya is cultivated, which is rejected

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\*\* Genetically modified organism.

\*\*\* Organisme génétiquement modifié.

by European consumers (European Commission, 2010), having at the same time a huge potential in the Danube Region. The Danube Area is an area of large potential agricultural surpluses and Danube Soya promotes the idea of using these surpluses to replace a part of the imported soya, rather than export more and more grain from the area.

Members of the Danube Soya association share the vision of a protein transition towards more European and more sustainable protein sources for food and feed.

The goals are to increase value added in the rural economies, promote European cooperation with and economic integration of the surplus areas of Central and Eastern Europe, improve crop rotation, reduce nitrogen fertilizer, increase food security and offer safe, reliable, constant and sustainable European protein to soya users and consumers all over Europe.

Offices in Vienna, Serbia and Romania as well as representatives in Italy, Poland, Germany, Ukraine and Switzerland are working constantly on the improvement and extension of the project.

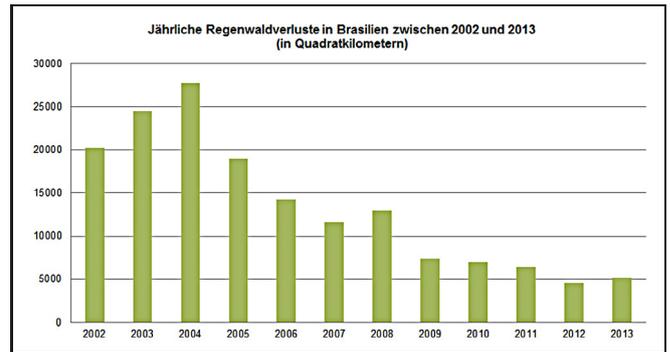
Danube Soya holds a standard, which stands for GMO-free, regional soya where producer and processors oblige the certain criteria's for plant protection, social rights and land use. The Danube Soya Association runs a certification scheme, which reaches, from soya seeds all the way to final products (such as milk, eggs, meat or soya food products), which can be labelled with the consumer label "Fed with Danube Soya" (for animal products) and "Danube Soya" (for soya food products).

Together with its partners, the Danube Soya Association implements and supports dissemination and research projects for soya breeding, agronomic best practice and soya usage.

## 2 History of Danube Soya

Today's European agricultural practices are unthinkable without soya. Worldwide soybean production rose from 17 million tonnes in 1960 to 315 million tonnes in 2015 (USDA, 2015). The biggest producing countries are the United States, Brazil and Argentina. Taking into account that soya is a nitrogen fixing crop and hence providing itself and in some rotation systems the following crop with nitrogen, the promotion of soya brings savings in fertilizer. Before the introduction of artificial nitrogen fertilizer legumes were an integral part of agriculture all over the world.

One year before the association was founded a study of the environmental institute in Austria, the Seri Institute was published (Hinterberger, Burger, Sellner, 2011). The study concluded that 77% of all CO<sub>2</sub> in Austrian pork emissions are coming from Soya. The main reason is "LULUC", which means Land use and land use change. To gain more land for the increasing demand of soya and other crops, tremendous areas of land are deforested in Brazil every day (Figs. 1 and 2). The situation has improved over the last years due to serious efforts by the Brazilian governments and voluntary stakeholder initiatives such as ProTerra and Round Table on Responsible Soya (RTRS), but serious concerns still remain and are constantly raised by important environmental NGOs<sup>1</sup>.



**Fig. 1.** Yearly Loss of rainforest in Brazil between 2002 and 2013 km<sup>2</sup>; Source: Faszination Regenwald (Initiative for rainforests) (2015).

The equivalent of 16 million hectares of land outside of Europe is used exclusively for soya production for European consumers. This is more than the size of the agricultural land of Germany. The use of such a huge amount of land means responsibility for the users of the soya.

Other concerns regarding the environment and people affected by the soya production also remain. The use of pesticides used for monoculture production or double-cropping (Soya – Maize) (Meyer, 2010) in Brazil<sup>2</sup>, especially glyphosate is growing (Fig. 3) and there are concerns that European consumers are affected by higher and higher glyphosate residues in our food (Friends of the Earth, 2013). In Argentina small farmers and families living close to big fields are affected by sprayings of pesticides. Diseases like cancer, Parkinson, disabilities are reported to have increased since 2004 in areas of massive glyphosate spraying (Onofre Nodari, 2010).

At the same time, huge potential in the Danube Region for cultivation Soya can be found. Soya production in the Danube area (excluding Ukraine) has increased from 560 000 hectares in 2011 to 960 000 hectares in 2015, a trend which is bound to continue. Danube Soya expects soya production in the Danube area to reach 1.3–1.5 million hectares in 2020. Ukraine alone has 2.1 million (Mio) hectares of soya in 2015 and will increase this surface dramatically over the next years. Danube Soya's vision is to supply Europe with 100% certified soya from overseas and Europe, where Europe supplies 50% of it, in 2025 (estimated by Danube Soya, 2015).

Danube Soya is providing consumers with the free choice to decide for a different type of soya. Danube Soya comes with the face of European farmers, Non-GM soya, soya grown in crop rotation, soya without glyphosate (chemical desiccation is banned in Danube Soya Certification from 1. 1. 2016). Danube Soya creates this choice with a voluntary certification scheme, which has been developed in a dialogue with all relevant stakeholders from farming organizations, collectors, oil mills, seed companies, feed companies, governments and civil society. The Certification scheme guarantees soya with a clear origin from the Danube River Basin, GMO-free soya

<sup>1</sup> Non-governmental organization.

<sup>2</sup> <http://commodityplatform.org/wp/wp-content/uploads/2011/03/slut-rapport-pesticide-brazilian-soybeans-1012081.pdf>.



Fig. 2. Losses of Rainforest in Paraguay, Brazil, and Argentina from 1977 to 2000, Source: German Architects (2015).

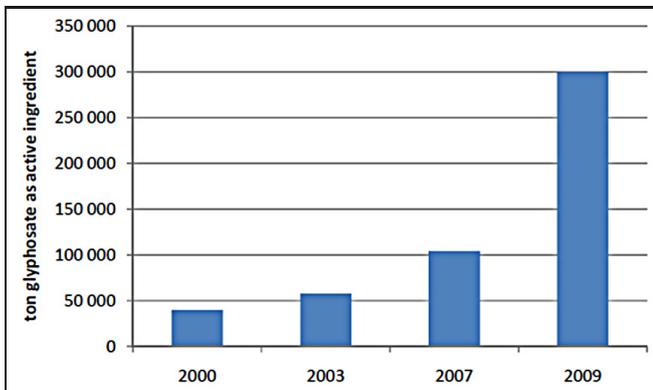


Fig. 3. Total sale of glyphosate in Brazil in tons of active ingredient, SIK-Report Nr. 809 according to ANVISA 2010.

according to European and national legislation, deforestation free soya (use of natural preserves or restricted areas is banned, only land zoned for agricultural production before 2008 can be used), restricted pesticide use and respect of labour rights.

Central and Eastern Europe has a large potential to increase food production. Many of the countries are still in transition mode from communism to free agriculture, and agricultural outputs are expected to increase by 2.5% every year over the next 15 years. Rather than increasing cereal exports from Europe, Danube Soya proposes to use a part of this increase for protein and legume production. This adds value to the rural economy because soya has to be processed locally, rather than exported as a raw material such as cereals.

By investing in the cultivation of quality soya, the Danube region and the Danube itself as a supply artery for Europe are strengthened. The rural economies of East and West are bound together by an increasing interdependence. The infrastructure expansion required for creating added value also provides interesting economic perspectives for the region.

Businesses and organizations from every link in the value chain are Danube Soya members and actively supporting its objectives. Primary processors, compound feed producers, agricultural traders, and many other partners are already certified.

Danube Soya aims at providing consumers with safe, sustainable, regional and GM-free soya, ensuring animal keepers long-term security of supply.

Revenues gained from the non-profit Danube Soya programme are also invested in research. On 33 locations, Danube Soya organises experiments, testing the optimal soya bean varieties from all over Europe, which are appropriate to each climate. Demonstration fields, cultivation recommendations and many other measures help farmers to best cultivate the ideal soya bean variety.

### 3 Objectives of the association

Danube Soya stands for genetic engineering-free soya of established origin produced in the Danube region – a contribution to the European protein supply.

More in details, Danube Soya:

- Assures the consumer that the product is made with GMO-free soya beans from the Danube region.
- Enables European companies to become pioneers in GMO-free and regional feed production and supports the establishment of regional values.
- Enables enterprises to meet demands for sustainably produced food and feed products, thereby creating a clear competitive advantage.
- Makes an important contribution to the integration of the Danube region and provides economic opportunity to the Danube countries.
- Makes an important contribution to the establishment of a sustainable and GMO-free European protein supply.

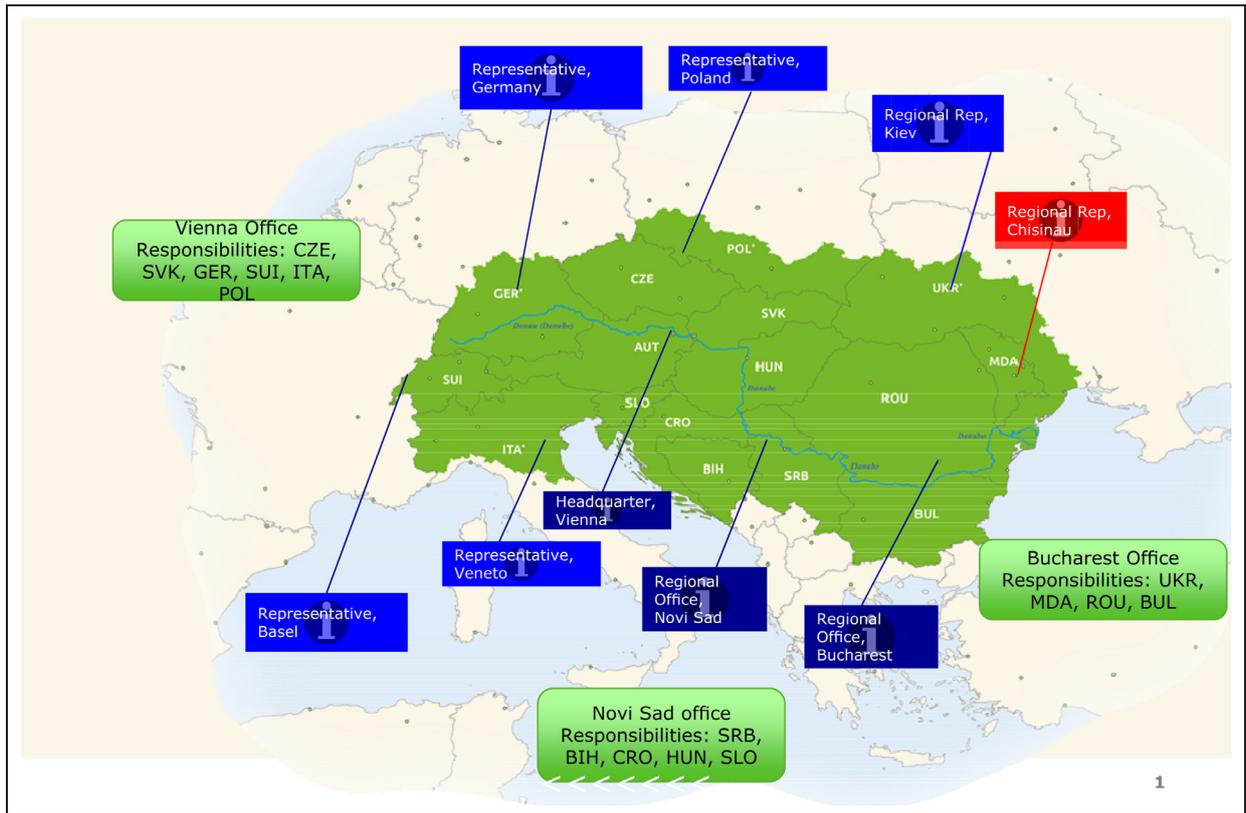


Fig. 4. Danube Soya Offices in 2015.

- Enables farmers to access the European market and increase their productivity and commercialization.

The Danube Soya association advocates:

- A stronger emphasis on the inclusion of soya cultivation within the framework of future European Union programs in national programs<sup>3</sup>.
- The establishment of standardized guidelines for GMO-free production and labelling within Europe.
- The establishment of standardized plant protection guidelines for the Danube area.

Danube soya declaration

The Danube Soya Declaration defines the necessary schedule for the implementation of an ambitious cultivation program in the regions along the Danube. The signature of already fourteen state secretaries and ministers of thirteen countries of the Danube region shows an important signal to establish a European Protein supply.

Austria, Germany (regions of Bavaria, Baden Württemberg), Hungary, Croatia, Slovenia, Slovakia, Bosnia and Herzegovina, Serbia, Switzerland, Bulgaria, Romania, Ukraine, Moldova and Poland welcome an European protein supply through their signature.

<sup>3</sup> Common agricultural policy.

## 4 Description of the organization

Danube Soya put great attention in building efficient governance structures, running its operation in a fully transparent manner and reaching financial stability. Its headquarter is located in Vienna. Danube Soya has currently physical representations in eight countries (Austria, Germany, Serbia, Bosnia-Herzegovina, Romania, Italy, Switzerland, Ukraine) (Fig. 4) and a highly motivated team. It is run by people who believe in a change of Europe's agriculture and apply good business sense to drive this worthwhile endeavour.

More than two hundred members from production facilities to soya traders, soya processors, food producers, compound feed plants and distributors, as well as research and breeding organizations are supporting the associations' goals. The general assembly is the head of the association; the board is leading the association activities consulted by the presidium, the advisory and scientific board (Fig. 5).

The board is advised by the presidium and the advisory board. Since April 2014 also the scientific board has been established and is working on research projects to improve the associations research project.

In 2014 the Danube Soya GmbH was founded to implement inspections. The Danube Soya GmbH belongs to 100% to the Danube Soya association.

The Danube Soya team is divided in area and department manager (Fig. 6).

Danube Soya Chairman is supported by two people dealing with standard and financials. Five department leaders

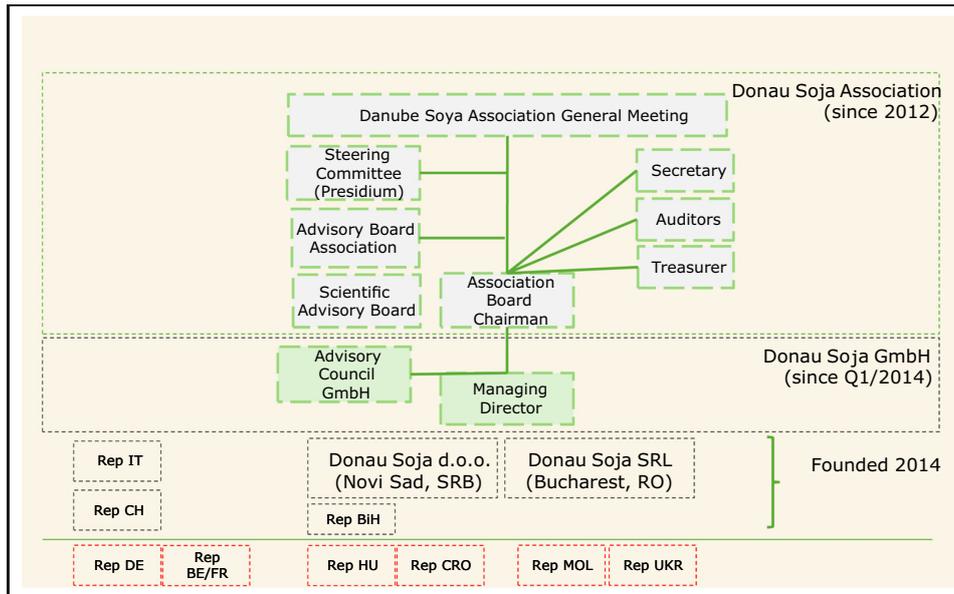


Fig. 5. Governance structure of the association Danube Soya in 2015.

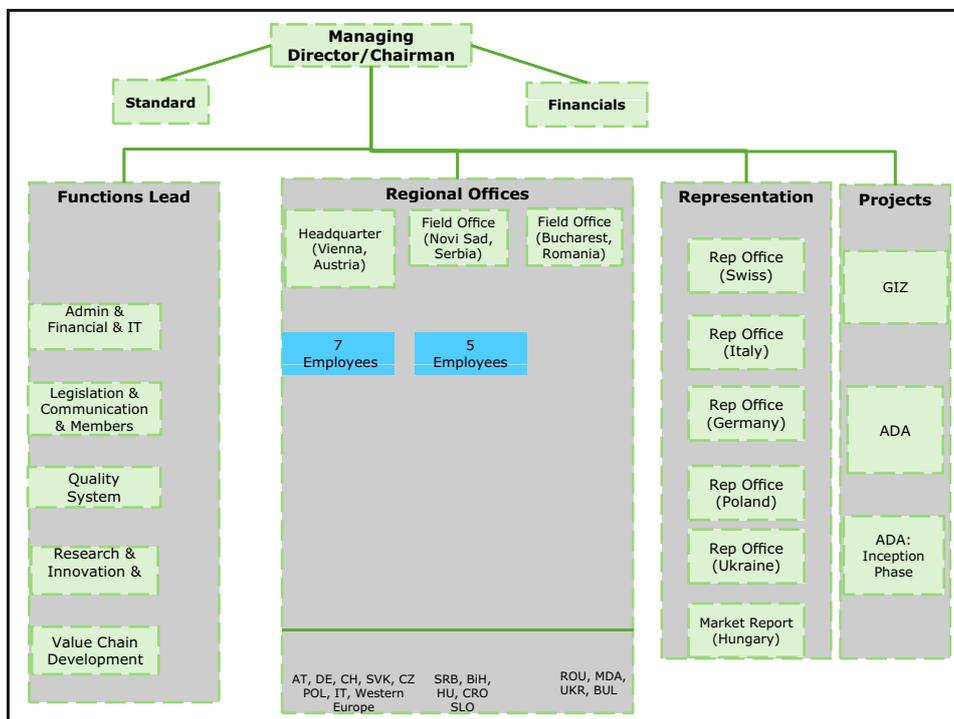


Fig. 6. Danube Soya Organigram in 2015.

and 3 country managers manage the association. Furthermore the association is working together with country representatives in Switzerland, Italy, Germany, Poland and Ukraine (Fig. 6).

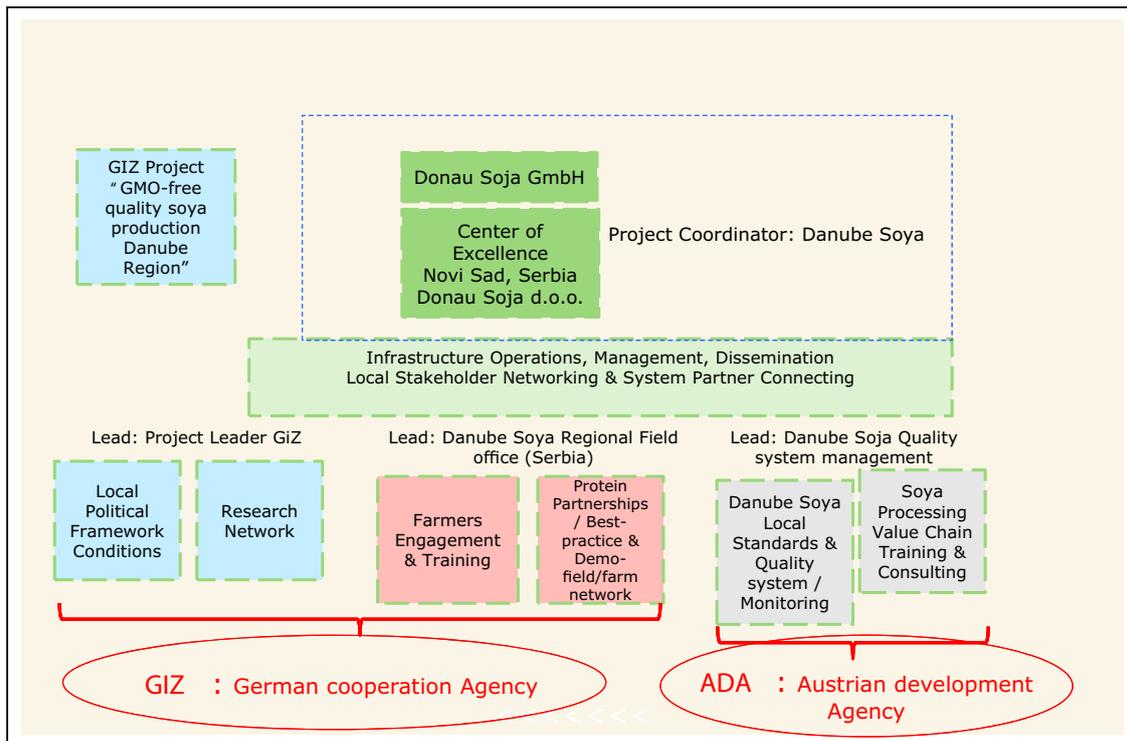
Danube Soya is primarily financed by membership fees and license fees for Danube Soya certified Soya tons, and receives funding from public sources.

In 2014 the total budget of Danube Soya Initiative was EUR 1.0 Mio. For 2015 the budget is in the range of EUR 1.6 Mio. Euro. According to the long-term financial

outlooks prepared by Danube Soya a self-financed operation of the association through membership and license fees will be accomplished within 4–5 years. This requires the achievement of the target volume of an estimated 800 000 licensed tons of European GMO-free Danube Soya.

Danube Soya currently manages funding from the following public programs (Fig. 7):

- through a joint grant program from Gesellschaft Internationale Zusammenarbeit (GIZ – the development agency in Germany) (850 000 € Budget with 100% funding)



**Fig. 7.** Structure of the Strategic Partnership with the German development agency or GIZ and the Austrian Development Agency (ADA) for the project Promoting Production and processing of GM-free premium quality soya under brand name Donau Soja in Serbia and Bosnia and Herzegovina (GIZ) and Qualitätssicherung in der südost-europäischen Sojaproduktion/Quality Management in southeast European soya production (ADA).

and Austrian Development Agency (ADA) (budget of 400 000 € with 50% funds) for the build-up of the Serbia/Bosnia and Herzegovina project 2014–2016;

- Austrian Ministry of Agriculture (Stakeholder process build and research development program 2013–2015) with a budget of 544 270 € and about 45% funding);
- Protein Partnership sponsoring programs where companies are linked with farms and organizations in the Danube Region to build up new trading structures (2015 onwards).

The above mentioned project in Serbia and Bosnia and Herzegovina will serve as a blue-print and reference project with baseline indicators for the Strategic Partnership of Danube Soya Initiative and ADA. The Partnership is open for additional project partners and financiers and would welcome them to join the partnership.

The structure of the project in Serbia and Bosnia and Herzegovina functions as referential structure for the structure of the Strategic Partnership and will be adapted accordingly.

## 5 The Danube Soya Standard

“Danube Soya” is an origin and quality-controlled product. Its main characteristics are its geographical origins – the Danube region and GMO-free production. The following additional aspects also apply:

- EU regulations concerning the use of pesticides in soya production. From 1. 1. 2016 chemical siccation will be



**Fig. 8.** Logos of Danube Soya: Danube Soya for food and Fed with Danube Soya for animal products.

banned, which means Danube Soya will be Glyphosate and Diquart free from sowing to harvesting.

- EU laws and international regulations (namely ILO) regarding social and labor standards.
- No land use change principle will be strictly applied, that is no new agricultural areas at the expense of national and international nature reserves, woods or moors will be developed.
- No farming on fields that were used for farming previous to 1. January 2008.

The products which have been processed from soybeans respecting these requirements can be sold under the brand Danube Soya and use the corresponding logo (Fig. 8).

## Traceability and certification

A large number of stakeholders play a role in the value and supply chain: soya farmers and production facilities, soya agricultural collectors, soya traders, soya processors/food producers, compound feed plants, distributors, local governmental and extension service institutions as well as research and breeding organizations and inspection bodies. In spite of France is not included in the Danube soya area, French stakeholders already play an important role in European GM-free soya production and in Danube Soya. French Seed Companies, input companies, agricultural traders and recently also soya users are active in Danube Soya.

These players are all participants in the Danube Soya system. Participants, if they are members are permitted to use the Danube Soya logo. Members of the Danube Soya Association, however, are soya processors, compound feed plants and distributors, and are 'Danube Soya system partners'.

Traceability is ensured through the primary processor's obligations to comply with Danube Soya (DS) guidelines and their agreement to inspections by external accredited bodies or representatives of the DS association. In order to ensure the conformity with the Danube Standard from the field to the primary processor, the risk based Danube Soya certification system starts at the soya field. The countries of origin of soya are grouped into 4 risk levels (RL) which are the basis for setting the frequency of the inspections. To cluster countries in risk classes Danube Soya is working together with the Environmental Agency in Austria. The risk categories are based on division of the country in the Danube Region (Risk class 1), occurrence of GM Maize (Risk class 2) and occurrence of GM Soya (Risk class 3). In countries with low risks for contaminations with GM Soya (risk class 0–2), the soya bean producer (farmer) sign a Danube Soya declaration of self-commitment and thereby confirms to fulfill all Danube Soya Requirements. In countries with higher risk for a contamination with GM Soya (risk class 3) a certification of soya bean producers is required. All participants being involved in dealing with Danube Soya beans and Danube Soya products located after the soybean producers, have to be certified according to the Danube Soya Guidelines.

Danube Soya claims a licensing fee of 3 € per ton from the primary processor, out of which 1 € is used for financing quality assurance, 1 € for market development and 1 € is used for innovation and research. No additional fees are required from production partners. The audit process runs typically in the already existing structures of certified control body accreditation and undertakings and aims not to increase substantially the existing control cycle costs.

## 6 Danube Soya Projects

Danube Soya works on various areas in stakeholder dialogues, working groups, dissemination and research.

- Inclusion of Soya cultivation in the framework of the future EU policies;
- Establishment of standardized Guidelines for GMO-free production and its labelling for food and feed;

- Establishment of standardized plant protection guidelines and of best practice agricultural manuals;
- Platform for discussions concerning original seeds, organic production, and other topics;
- Information provider of market relevant data in soya;
- Quality management developing Information Technology Tool for the traceability and inspection of Danube Soya Beans;
- European Soya Standard under "Europe Soya";
- Research Project for Breeders and Researches to develop and strengthen a European research project for GMO-free Soya beans;
- Protein Partnerships to develop new trading relationship in the Danube Region.

## 7 Figures of 2014 and 2015 – Certified Partners and Projects

A general increase of soya could be observed from 2013 to 2014. About 100 000 hectares more soya was cultivated in the Danube area in 2014 (excluding Ukraine). Romania records an increase from 67 400 hectares in 2013 to 86 000 Ha in 2014, respectively from 150 000 tons to 210 000 tons. In total 25% more soya were produced in Europe than the year before (Tab. 1). One reason is for sure a higher demand due to Danube Soya.

Fifty thousands tonnes of certified Danube Soya were sold as Danube Soya by the end of 2014. For 2015 Danube Soya expects to certify 120 000 tons, and for 2016 more than 250 000 tons are planned. For 2014, most Danube Soya certified soya beans came from soya producer in Hungary, Italy, Croatia, Serbia, Slovakia and Austria and smaller quantities from other countries within the Danube Soya region. For 2015, an increase of soya beans coming from Ukraine and Moldova can be expected. The biggest success story was the changeover of the Austrian Laying hens in 2013. Only this branch requires about 40 000 tonnes of Soya. In November 2013 Danube Soya announced the launch of Danube Soya eggs in all four retailers in Austria. REWE, SPAR, Lidl and Hofer, members of the Danube Soya Association, sell more than 350 million eggs per year. Since one year Coop laying hens from Naturafarm in Switzerland are being fed with Danube Soya, from mid of 2015 they will all and exclusively be fed with Danube Soya. Since December 2014 Coop-Naturafarm poultry were switched to obligatory feeding with Danube Soya. A further success could be completed in Switzerland: since April 2015 Swiss consumers can find even more poultry products labelled with Danube Soya on the shelves. Micarna, an organisation delivering poultry for Migros, which is a Swiss retailer, changed their production to Danube Soya.

The Austrian success was also continued with two further projects: the Austrian companies Schirnhöfer and Hütthaler, producers of pork, decided to motivate a part of their farmers to feed their animals with Danube Soya. About 40 000 pigs are now fed with Danube Soya.

Also a lot of new projects in Austria, Switzerland and Germany are coming to the market soon. Now are three

**Table 1.** Estimated Soya production in the Danube Region (Danube Soya estimations based on reports of Copa Cogeca, 2014, Toepfer 2013, FAO Statistics, National Statistics Bureau of Moldova, Mr. Milos Nozanic, Jerzy Nawracala, USDA, Eurostat, Statistics Denmark, Slovakian Statistical Office, TIKE Tietopalvelu Finland, Statistics Sweden, 2015).

Country	2013		2014		2015 (provisional)		2020 (estimates)		2025 (estimates)	
	production	yield	production	yield	production	yield	production	yield	production	yield
Austria	82 800	1.97	118 000	2.69	134 700	2.69	200 000	3.30	200 000	3.30
Bosnia-Herzegovina	10 800	2.40	14 200	2.40	15 800	2.40	31 900	2.40	39 900	3.00
Bulgaria	700	2.40	4 800	2.40	30 000	1.50	176 400	2.40	367 500	3.00
Croatia	113 100	2.40	110 000	2.20	144 000	2.40	152 200	2.40	225 000	3.00
Czech Republic	13 500	2.08	13 900	1.93	20 000	2.00	16 800	2.80	16 800	2.80
Germany	15 000	2.88	13 300	2.30	27 600	2.30	28 000	2.80	28 000	2.80
Hungary	78 800	1.86	113 700	2.69	169 500	2.69	519 100	2.80	692 200	2.80
Italy	624 800	2.84	564 600	2.35	780 000	3.00	1 091 000	3.30	1 091 000	3.30
France	110 300	2.57	222 000	2.98	259 600	2.95	264 000	3.00	3.00	3.00
Moldavia	100 800	2.40	140 000	2.55	156 000	2.40	235 000	2.40	349 500	3.00
Poland	6 600	2.40	18 300	1.30	24 700	1.30	27 200	1.40	27 200	1.40
Romania	149 900	2.22	209 000	2.42	314 100	2.42	884 600	2.40	1 638 000	3.00
Serbia	385 000	2.41	630 000	3.50	648 000	3.00	711 900	3.00	711 900	3.00
Slovakia	39 600	1.36	78 200	2.34	57 000	1.90	123 500	2.80	168 000	3.20
Slovenia	500	4.50	400	4.00	800	4.00	800	4.00	800	4.00
Spain	1 400		2 600							
Switzerland	3 800	2.70	10 500	2.70	11 200	2.80	11 200	2.80	11 200	2.80
Total Danube Soy Region	1 625 700		2 038 900		2 533 400		4 209 600		5 567 000	
Total 1 (Danube Soy Region & EU-Rest without Ukraine)	1 737 400		2 263 500		2 793 000		4 473 600		5 567 000	
Ukraine	2 774 000	2.05	3 906 000	2.17	4 665 500	2.17	9 180 000	2.55	13 224 000	2.90
Total 2 (Danube Soy Region & EU-Rest with Ukraine)	4 511 400		6 169 500		7 458 500		13 653 600		18 791 000	

different Danube Soya products on the market: eggs, chicken and pork.

Currently every month new collectors, processors and users are joining the program, can be mentioned following actors:

- Soya Traders and Agricultural Collectors: 84 in Austria, Croatia, Hungary, Italy, Romania, Serbia, Slovakia and Switzerland.
- Soya Bean Primary Processors: 15 in Austria, Hungary, Italy, Romania, Serbia and Switzerland.
- Compound Feed Plants: 25 in Austria and Switzerland.
- Marketers: 22 certified Danube Soya egg packing plants with more than 300 laying hens holders in Austria and 2 Slaughterhouses – pork producers with approx. 10 pig farmers each in Austria and 1 Slaughterhouse – poultry producers with approx. 64 poultry farmers in Switzerland.

From harvest 2015 organic soya can also be certified as Danube for the first time.

A special success was the certification of Victoria Logistic and Sojaprotein, based in Serbia, Sojaprotein is producing soya protein, meal, oil and soya for food. They successfully implemented the Danube Soya Standard for the cultivation and processing of non-GMO soybeans. The audit related to the certification process was conducted by SGS, an authorized inspection body, and representatives of the two companies officially received the certificates from the Manager of the Agricultural Sector at SGS Serbia.

Sojaprotein is the first company in the region to receive this certificate for processing non-GMO soya beans into soya protein concentrates, which are widely used in animal nutrition. This way, the company has gained yet another competitive advantage in the placement of the protein concentrates on the most demanding markets in Europe, including Austria, Switzerland and Germany.

### Information Technology (IT) System Project for Quality Management

To professionalise the inspections and consulting of Danube Soya partners an own IT system has been established in 2014. The program is already used by the Danube Soya team and some Inspection bodies included it in their daily working routine. Soon the association is able to manage all lot-certificates over the system and thereby gather all quantities of Danube Soya in the system. In the next month, Danube Soya will work on uploading all certified Danube Soya partners into the IT system in order to provide a level of maximum security and service to our partners.

## 8 Future

Five-seven Mio. Tons of Europe Soya demand currently is GMO-free but only about 1/3 (1.5–2.0 Mio. tons) can be currently supplied by European cultivation. By promoting the cultivation in the Danube region (including the Ukraine) the production of 5 Mio. Tons could be achieved by 2020. Danube

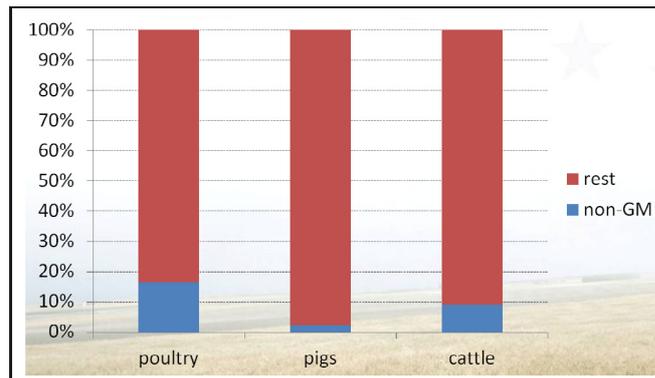


Fig. 9. Market share of livestock specific percentages of non-GMO in compound feed, FEFAC, 2013.

Soya estimates that European GM-free soya demand will double to 10 Mio. Tons in 2020, so that imports of GM-free soya will not be reduced.

The main drivers for GMO-free soya are the egg production and poultry meat at EU level due to the higher request of retailers (FEFAC, 2013). Dairy companies also request more and more GMO-free feed, which also lead to an increasing demand in this sector (Fig. 9). Only the pig production is not yet demanding a high volume of GMO-free feed, but there are also promising signs this will change.

Retailers, especially in Austria, Germany and Switzerland send out more and more commitments in taking responsibility in promoting a sustainable agriculture, which includes the sourcing of sustainable soya.

With these increasing commitments a higher demand of Danube Soya can be expected.

Danube Soya is expanding its work in the area by building representative offices in Ukraine and Moldova and involving more and more stakeholders in the activities.

Danube Soya has also published a new preliminary guideline for Europe Soya, a certification scheme for European Soya from all the European land area. This scheme is preliminary and should be part of a future European platform including soya producers outside of the Danube area like France area.

Danube Soya would like to propose to develop a European platform in the future for increased lobbying for legumes and protein crops in Brussels, for developing a joint standard and brand for European Soya production and for joining research and development efforts.

Danube Soya welcomes all joint activities and initiatives and would like to offer itself as a reliable and progressive partner for all initiatives strengthening European protein and legumes production.

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