

DS presentation for CSI webinar

17th May 2022

 Austrian
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Agency



Sustainable soy sourcing in Europe in the light of the war in Ukraine

Susanne Fromwald & Volodymyr Pugachov

WAR IN UKRAINE

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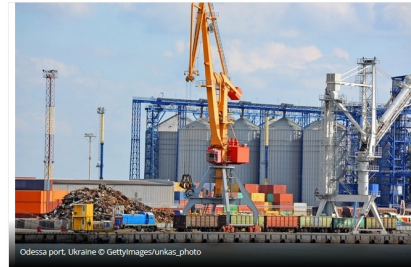


BLOCKADE OF PORT

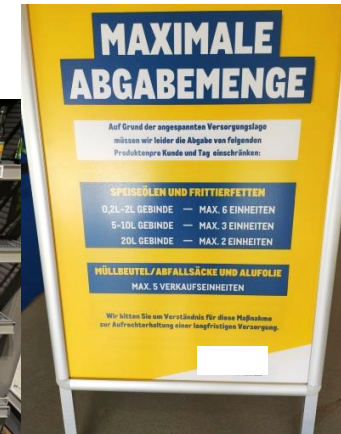
Donau Soja rubbishes claims that the 'raw material basis' for non-GM production 'has collapsed'

By Jane Byrne

13 May 2022. Last updated on 13 May 2022 at 17:52 GMT



OIL – EMPTY SHELVES



FARMING IN UKRAINE



PRESSEINFORMATION: FOLGEN DES KRIEGES GEGEN DIE UKRAINE
DRV-Hauptgeschäftsführer Dr. Henning Ehlers zu den Folgen des Krieges gegen die Ukraine:
„Rohstoffbasis für ohne-Gentechnik-Produktion weggebrochen!“

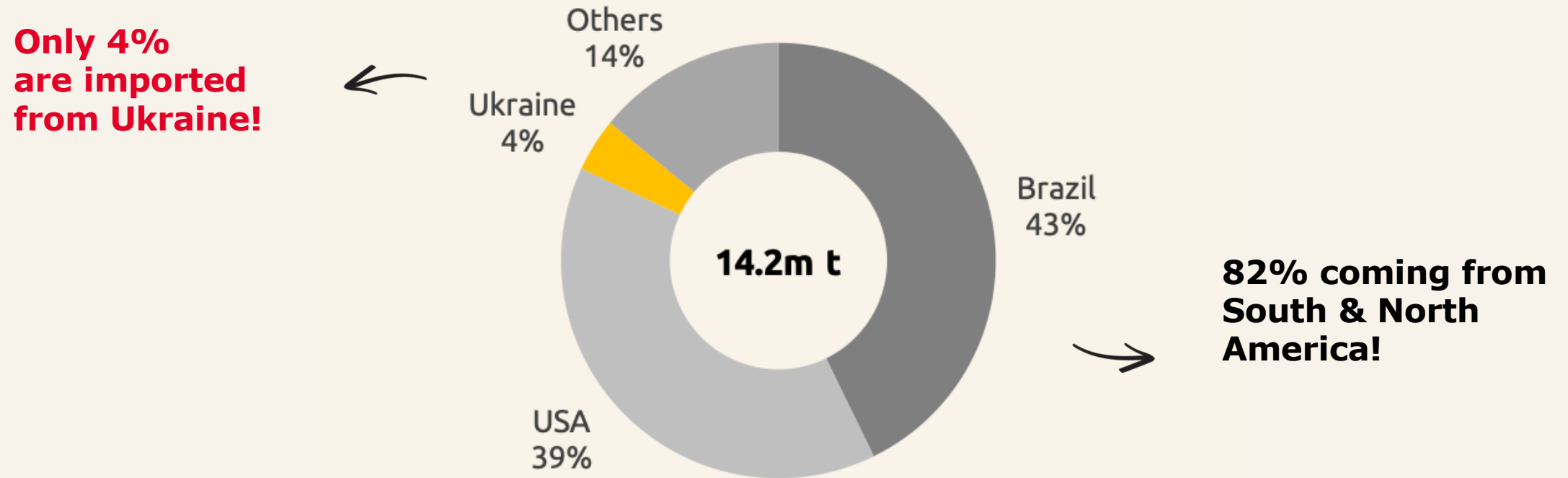
DRV



Origin of EU imports for soybeans and meal

IMPORT OF SOYBEANS IN EU-27

Import of soybeans into EU-27, mean 2017–2021

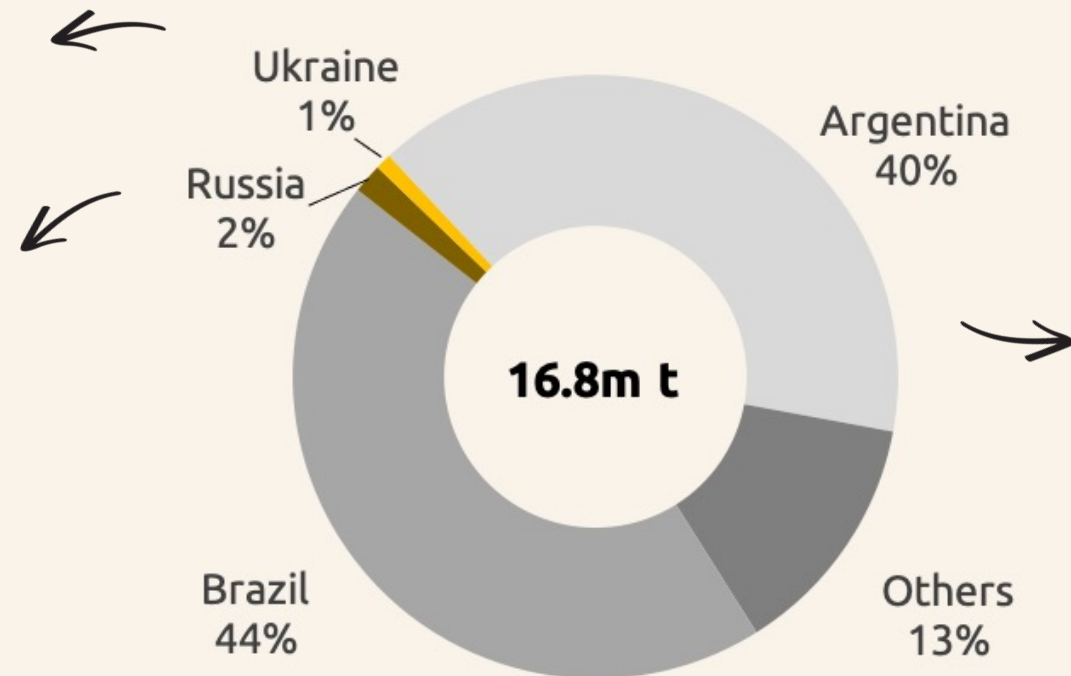


IMPORT OF SOYMEAL TO EU-27

Import of soymeal into EU-27, mean 2017–2021

**1% coming
from Ukraine!**

**2% coming
from Russia!**



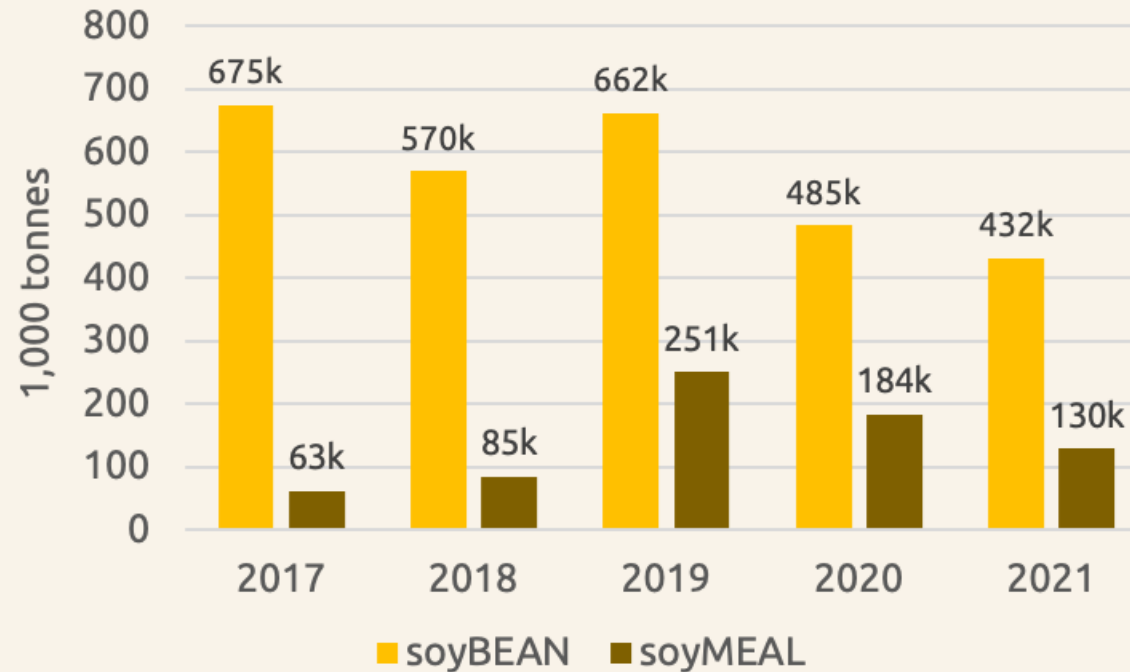
**84% imported from
South America!**

Export volumes from Ukraine to EU, including destinations for soybeans and meal

SOYBEAN & SOYMEAL EXPORTS FROM UKRAINE TO THE EU-27



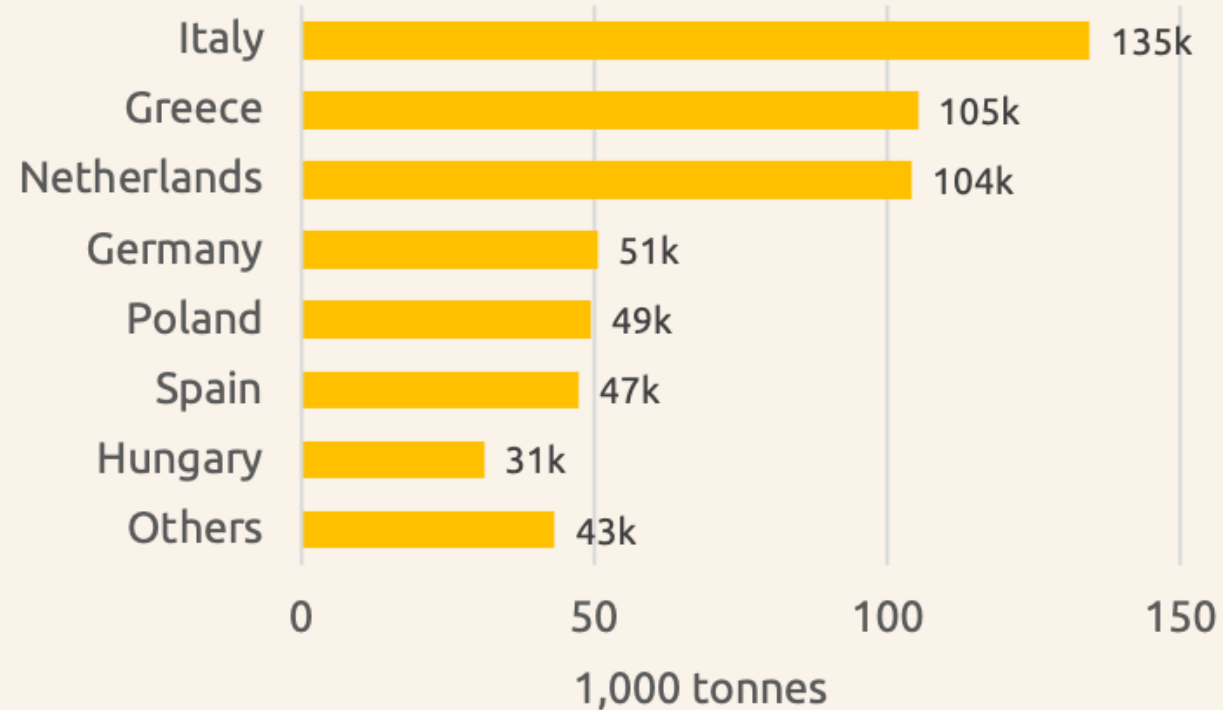
Soybean and soymeal exports from Ukraine to the EU-27, 2017-2021



EXPORT OF SOYBEANS FROM UKRAINE TO THE EU-27



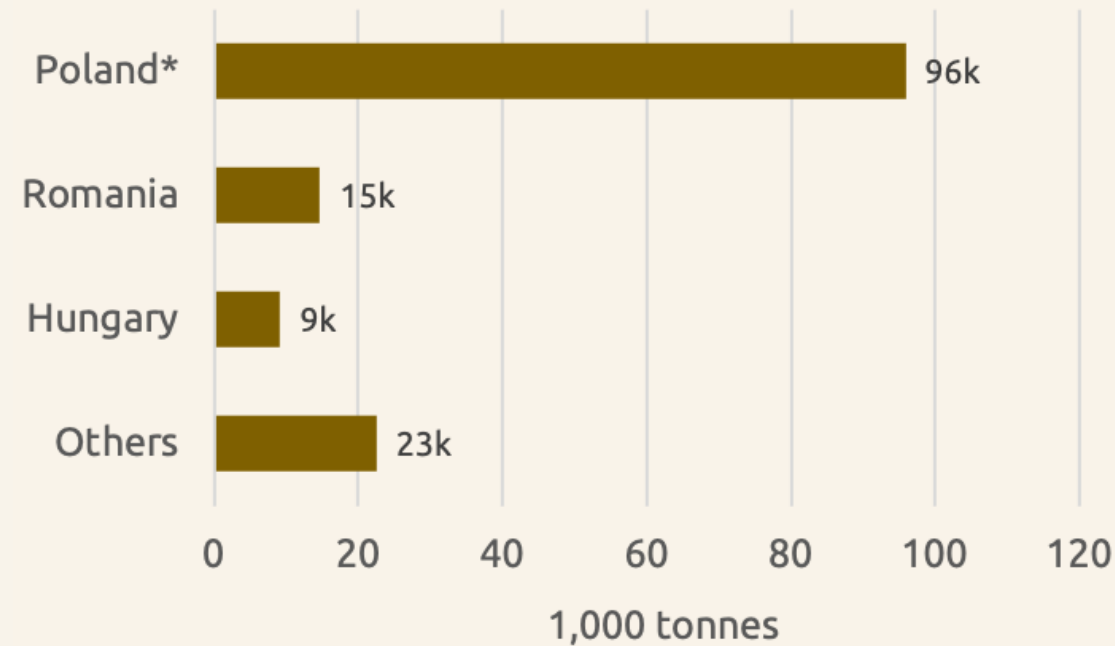
Export of soybeans from Ukraine to the EU-27, by destination, mean 2017-2021



EXPORT OF SOYBEAN MEAL FROM UKRAINE TO THE EU-27



Export of soybean meal from Ukraine to the EU-27, by destination, mean 2017-2021



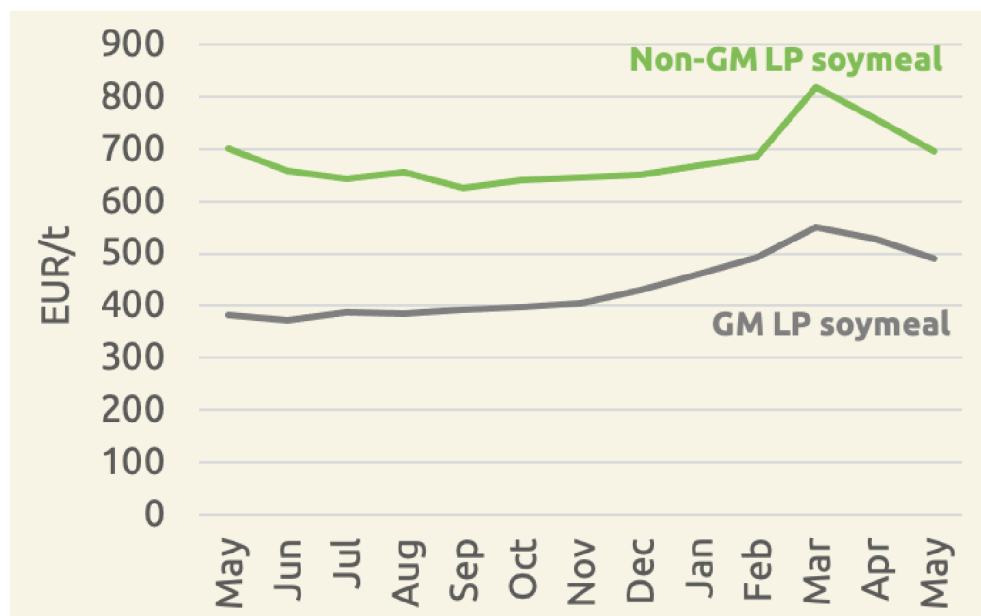
*in 2021 data only for the period Jan-Nov was available, source: EUROSTAT data

Source: Eurostat

How about premiums & prices?

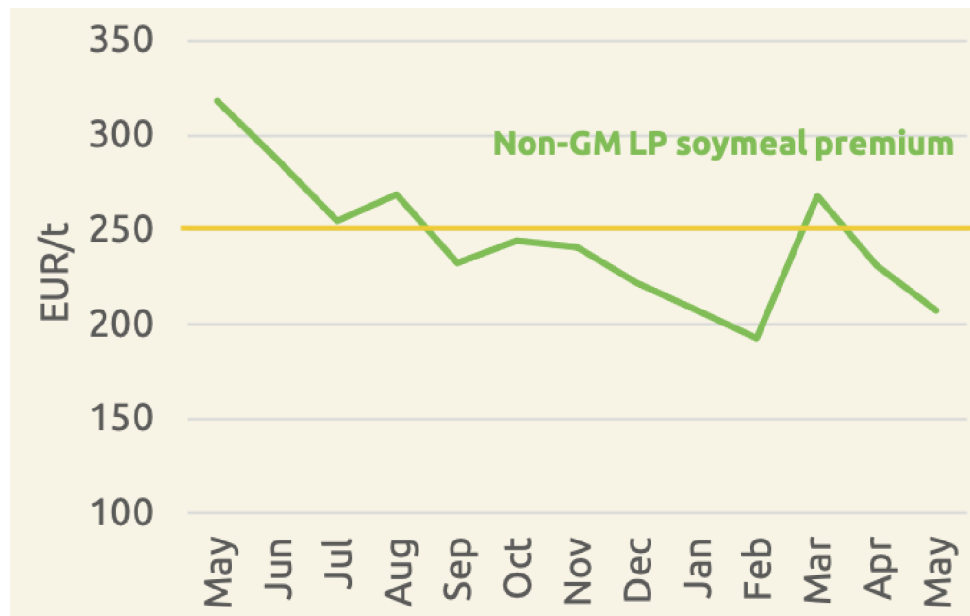
PRICES & PREMIUMS

Monthly avg. price of low-pro non-GM/GM soymeal in South Germany (May 2021 - May 2022)*



* Notes for the graph: the prices are based on price indications, May 2022 prices are recorded until May 13.
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






Monthly avg. non-GM soymeal premium development in South Germany (May 2021 - May 2022)*



* May 2022 prices are recorded until May 13
 Source: prepared by Donau Soja

DS/ES SOYA BEAN MEAL PRICES

Non GMO soy meal 44% protein

Delivery month		Mai/Jul 22	Aug/Okt 22	Nov/Jan 23	Feb/Apr 23
North Germany* 		727	727	715	-
South Germany* 		713	713	700	-
Austria destination Linz* 		692	692	681	-
Hungary destination Budapest* 		673	669	662	-
Italy destination Mailand* 		710	710	680	-
North Germany destination Brake (oversea goods)**		720	737	719	719

*Figures in €/t, carriage paid to

**Figures in €/t, delivery fob ex works

Source:

Agrarmarkt Informations-Gesellschaft, Bonn
Verein Donausoja

Exclusive information on our website!

→ Go to: www.donausoja.org/ds-es-soya-bean-meal-prices/

In cooperation with:

 **PROTEINMARKT**
Das INFOPORTAL für Fütterung & Management

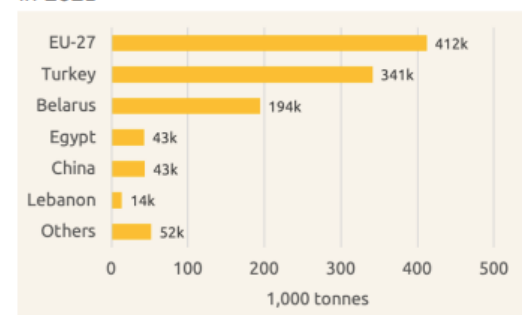
Current soya situation in Europe – CSI 17.05.2022

DONAU SOJA MARKET REPORT

Monthly market report for the non-GMO market, including prices, forecasts and estimates for supply and demand



Figure 2 Ukraine's soybean export by destination in 2021



Source: Ukrstat

OUR MARKET EXPERT:



Bertalan Kruppa
Soybean market analyst
kruppa@donausoja.org

Want to order it?

To learn more about the terms and conditions for the subscription to the monthly market report, please feel free to contact Mr Bertalan Kruppa.

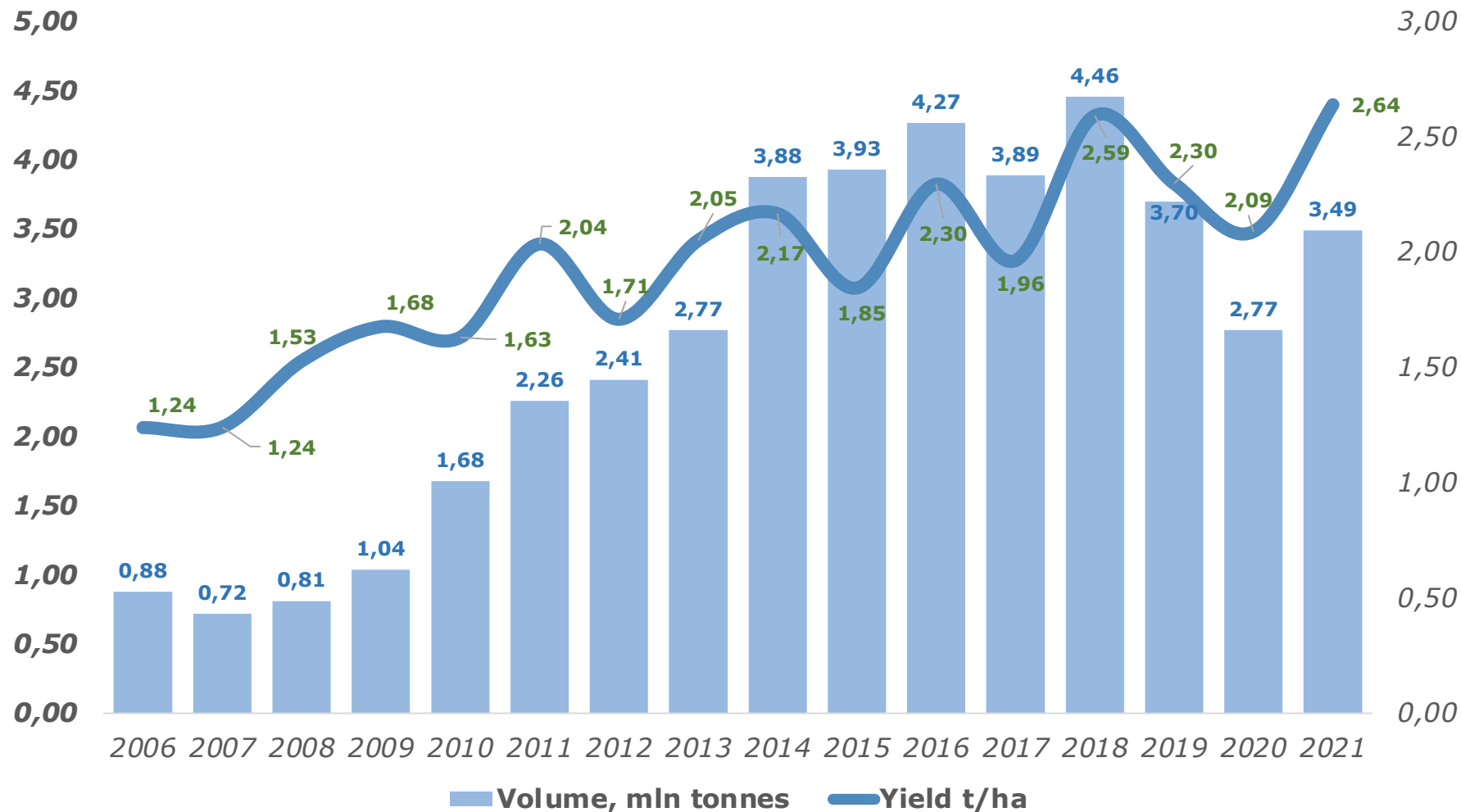
- Monthly market report
- Free of charge for DS members
- Get valuable insights about the non-GM market!

(Sustainable) soya cultivation in Ukraine in 2022

Development of soya production in Ukraine

data source: State Statistical Service of Ukraine

 Austrian Development Agency



Sowing under war conditions in Ukraine

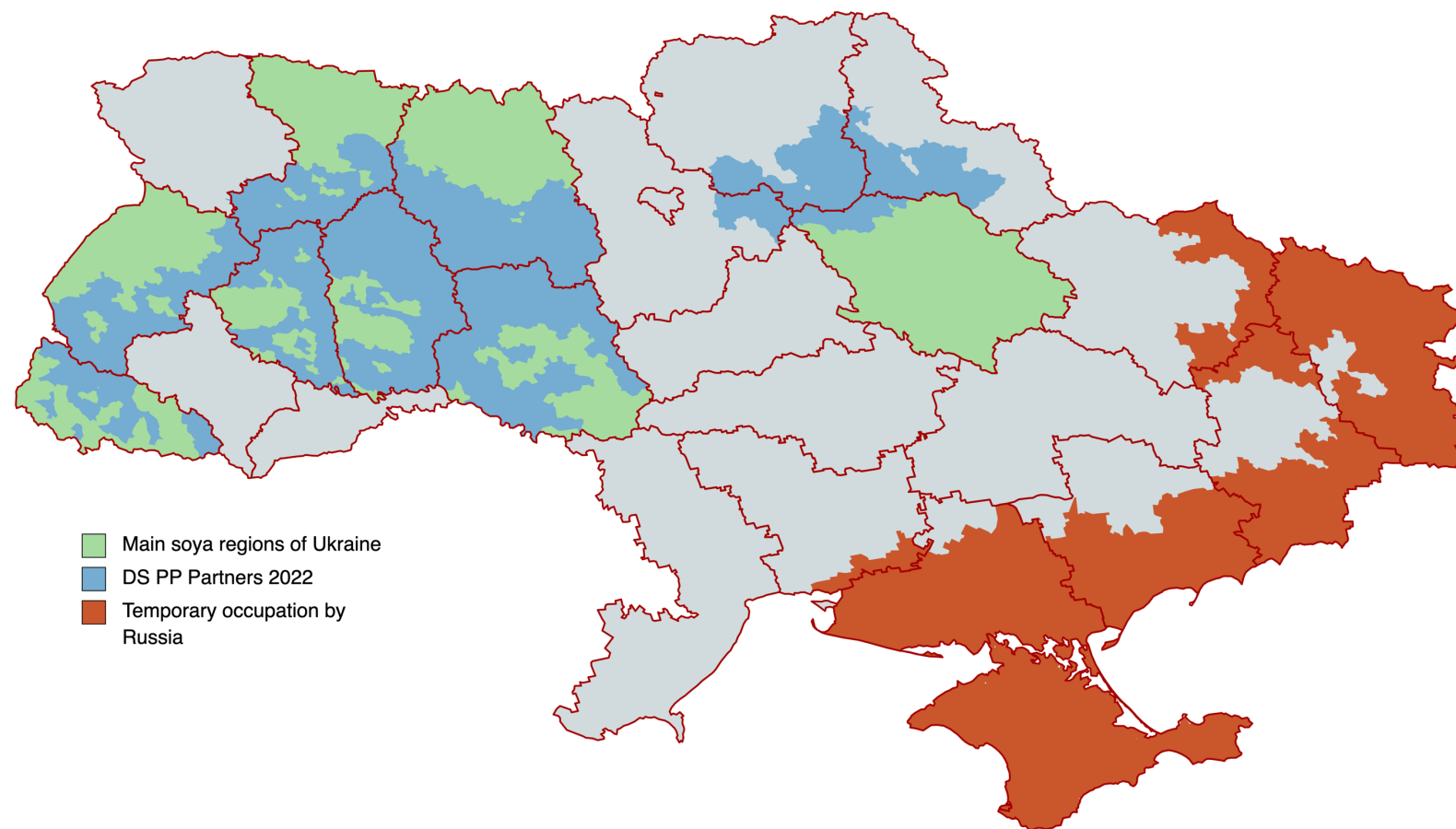
Spring sowing campaign has started.

Soya production is concentrated in **8 regions**, in the western and central Ukraine.

Around **70% of agri-lands** is already sown now (forecast - 20% to 2021).

We prognose around **1.2 mln** ha under soya (-11% to 2021).

0.9 mln ha of soya is already sown (16th May).



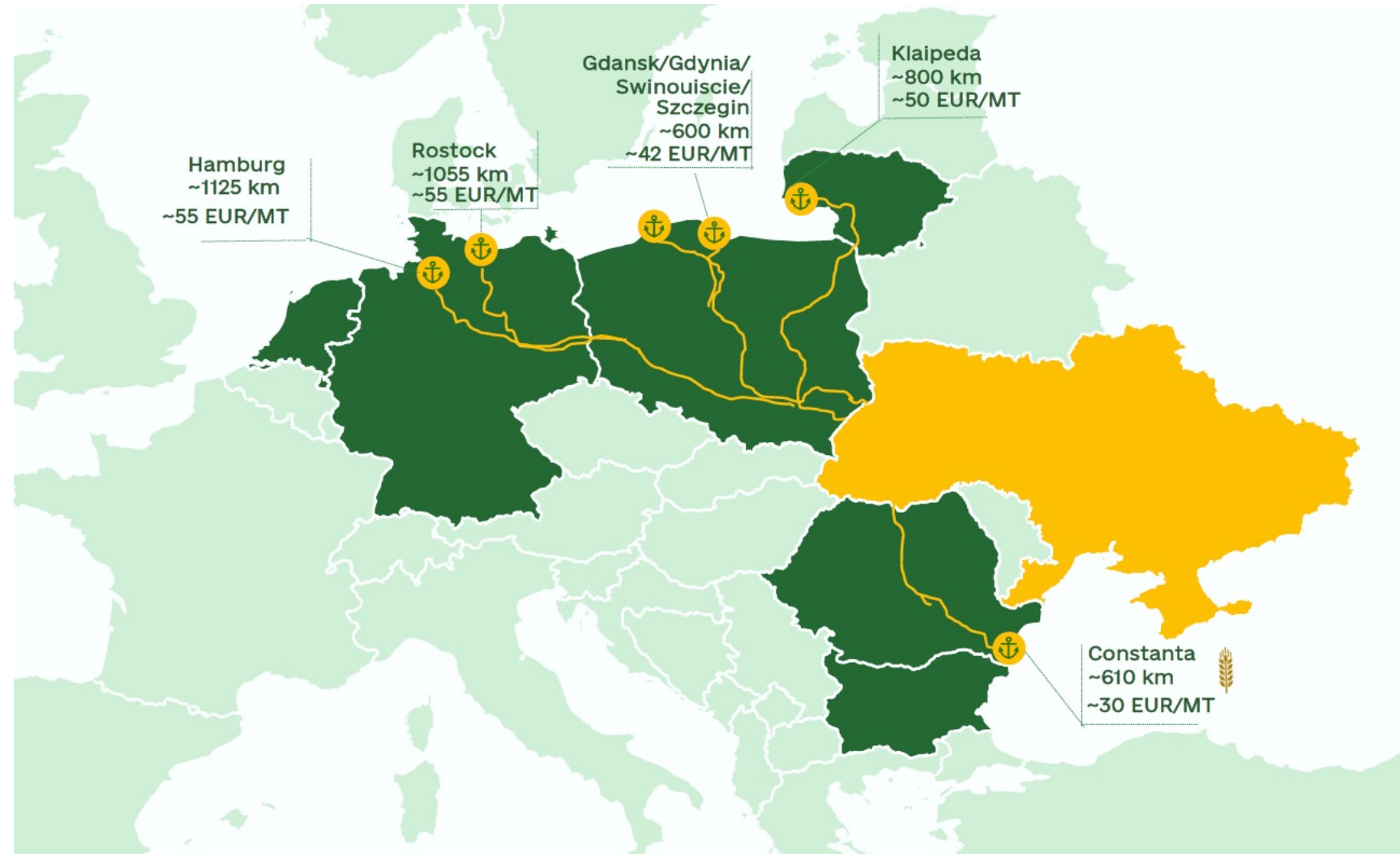
How the war effecting Ukrainian agriculture

Black and Azov sea ports
are blocked.

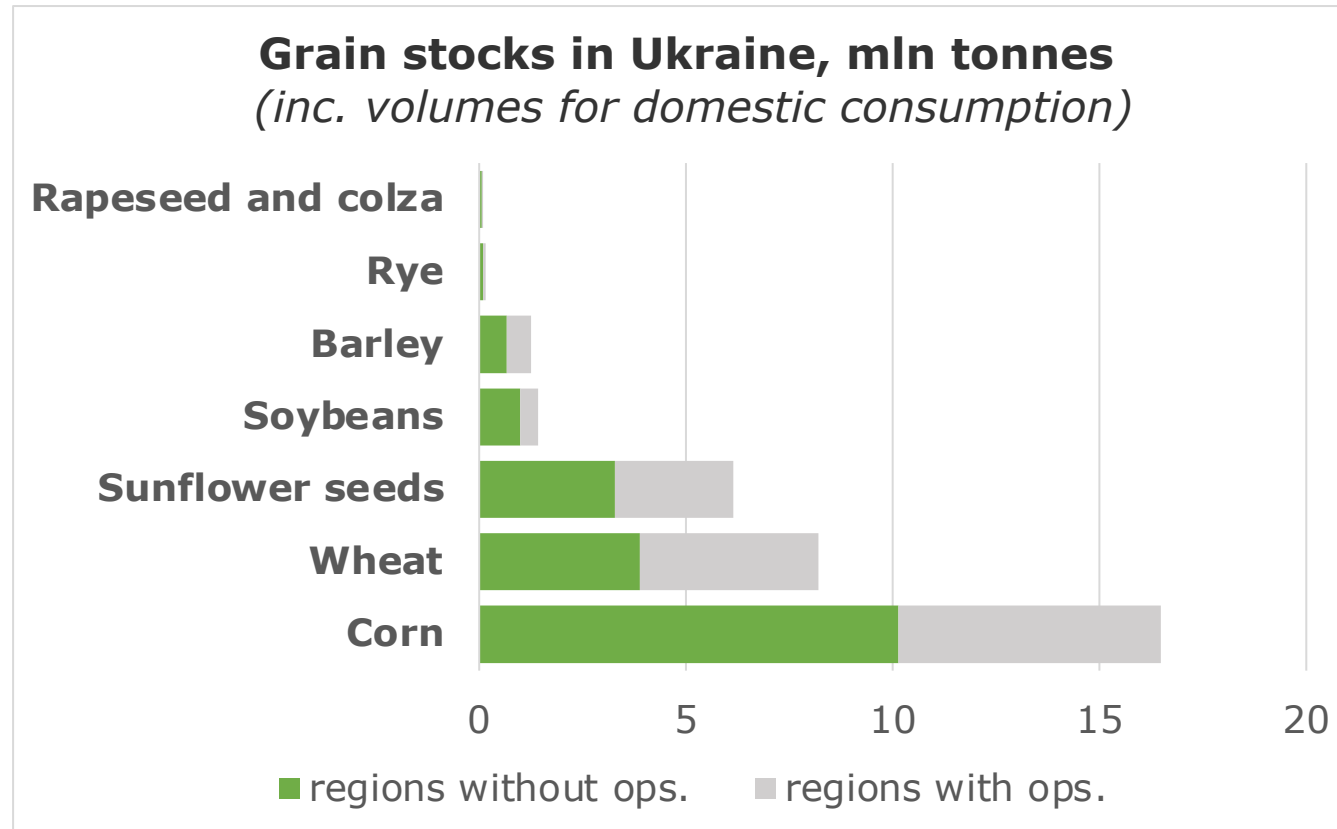
Ukraine is export oriented –
productions of crops (inc.
soya) **4-5 times exceeds**
consumption.

Normally Ukraine exports
4-5 mln. tonnes per
month via the ports.

Solution: in-land
alternative routs must be
developed.



Stocks in Ukraine – need to strengthen export logistics



Total stocks in Ukraine: 33.8 mln tons
In regions with warfare: 14.7 mln tonnes*

*data on 1st March

It is necessary to export **13-15** mln tons
from harvest 2021 (excluding domestic
consumption)

Expected winter harvest of 8.7 mln ha:

wheat - 27 mln tonnes
barley - 4.2 mln tonnes
rapeseed - 2 mln tonnes

Challenges caused by the war in Ukraine

To support UA producers DS is going to focus on the following:

- trainings related to farming during **limited resources** availability (seeds, fertilisers, fuel etc.);
- activities to **overcome the bottleneck** with export routes from Ukraine caused by military blocking of the Black Sea ports.

E.g. Donau Soja co-organised and facilitated the EU-Ukraine Ministerial discussion on challenges and opportunities of current commodities exports from Ukraine at the **Prague Karlsbourse** on 13th April 2022.

At similar discussion with Italian Government at the **Commodities Exchange in Milan** on 6th May 2022.



 Karlsbörse Prag

Ukraine im Mittelpunkt der Debatten

Im Rahmen des Branchentreffens informierten hochrangige Vertreter der Ukraine und der osteuropäischen Nachbarn über Pläne, die Exporte des Landes auf dem Landweg zu intensivieren. [Mehr >](#)

Protein Partnership programme – increased interest from the side of the farmers

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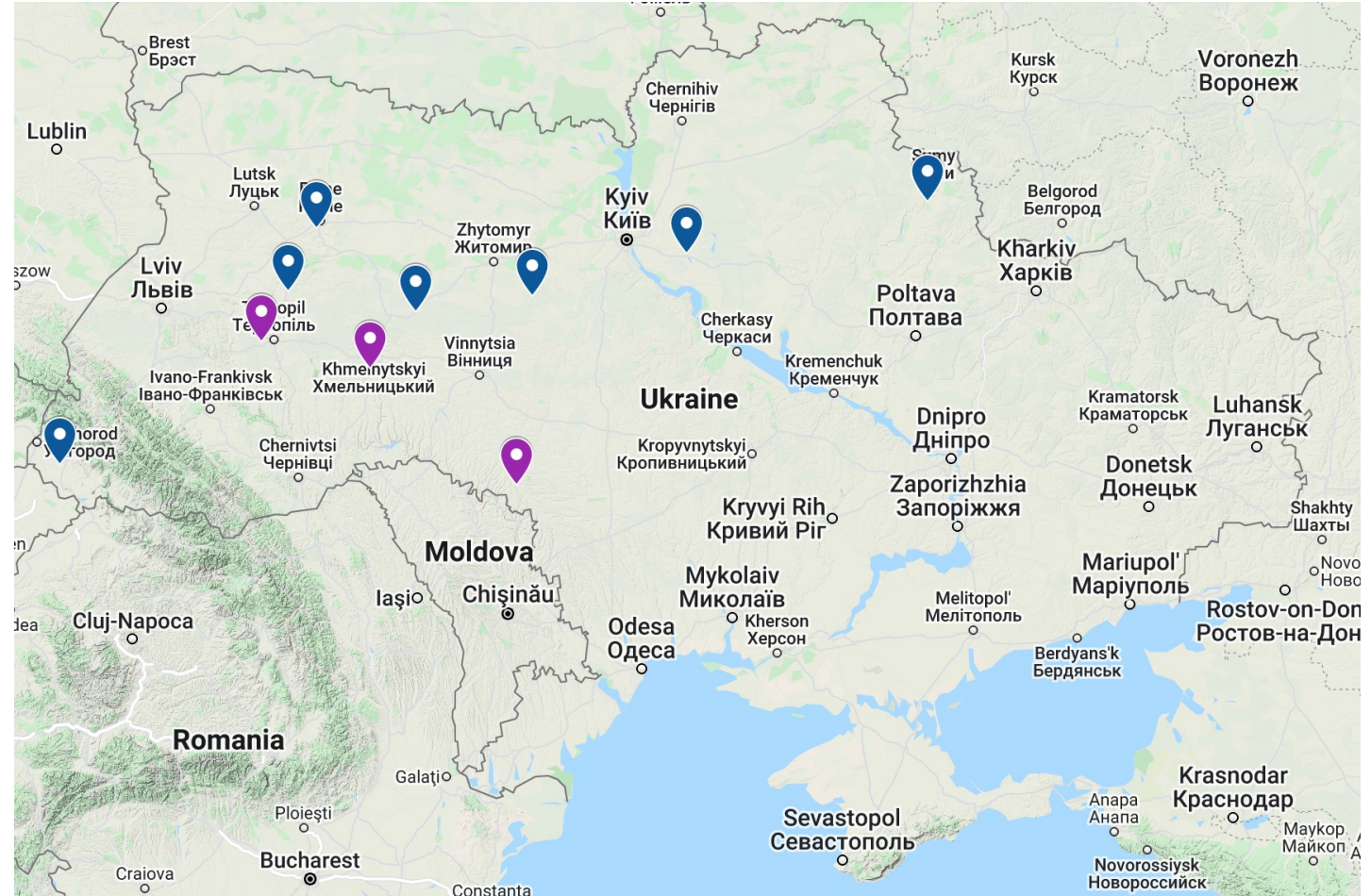


Non-GM sustainable soya volumes are developing via the Protein Partnership programme.

Participation in the Programme:

- provides additional opportunities while exporting soya to the EU;
- helps Ukrainian companies to **adapt to EU** (and beyond) sustainability requirements.

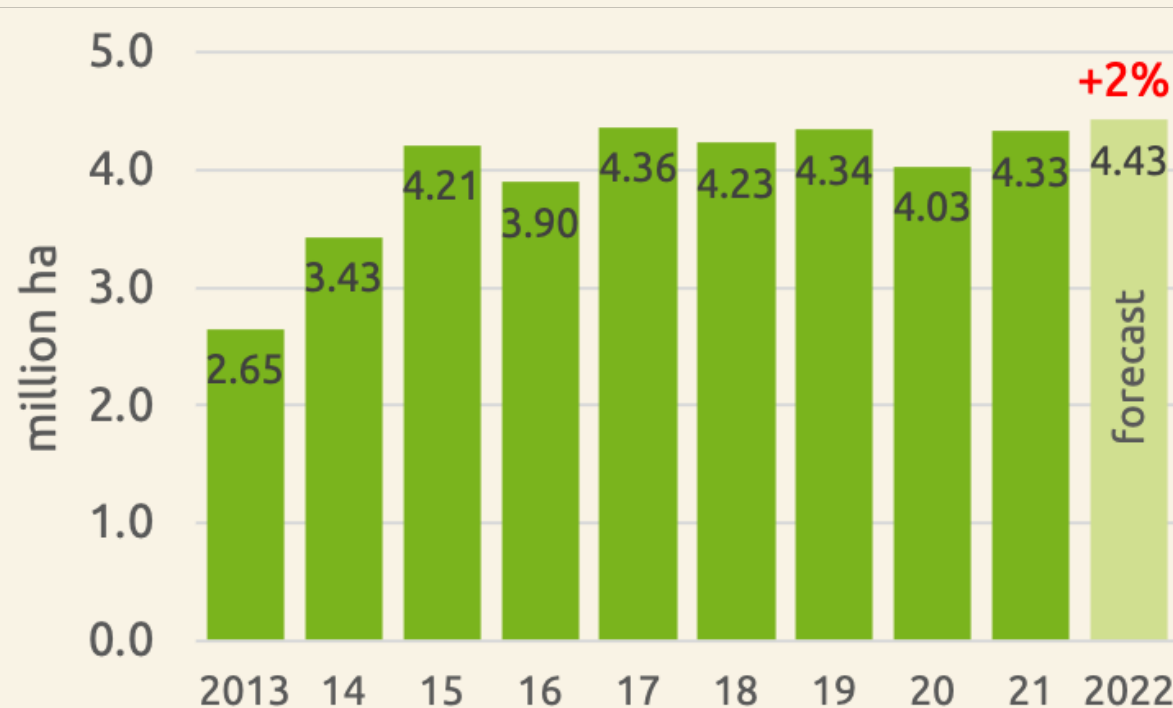
Increased volume of non-GM sustainable soya (certified) in Ukraine – harvest 2022 and 2021.



Forecast soy cultivation in the EU and Europe

SOYBEAN AREA IN EUROPE

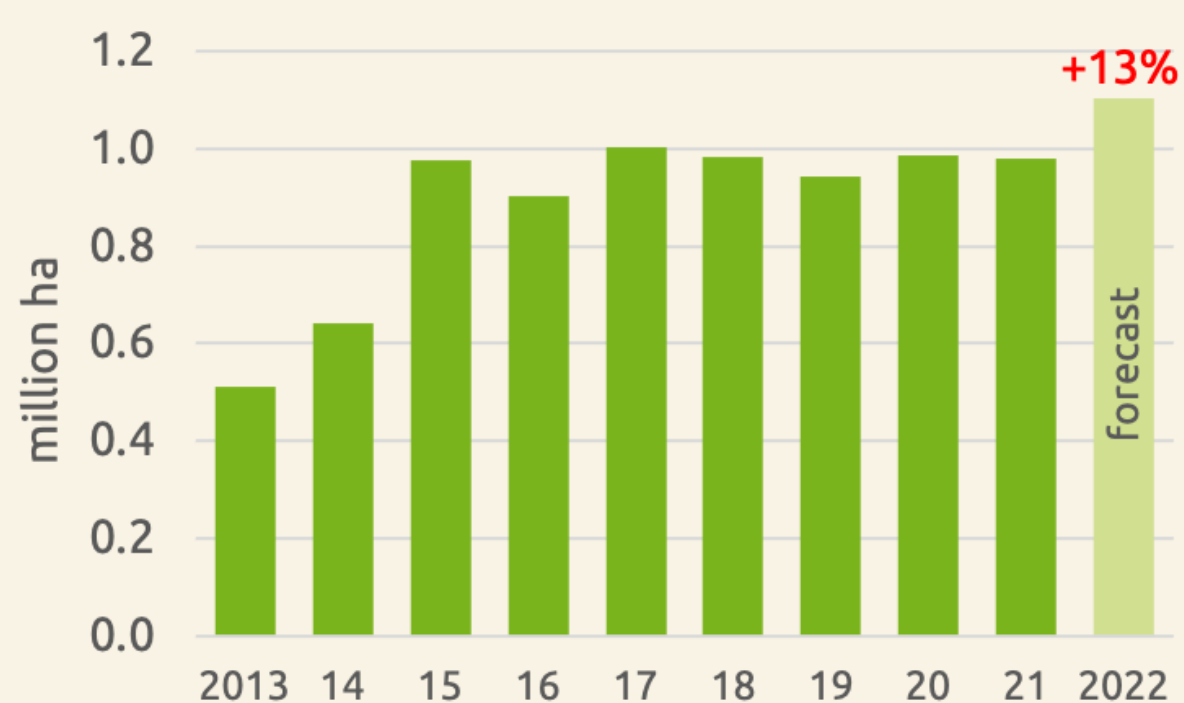
Soybean area development in Europe (2013 – 2022 forecast)



Source: Donau Soja

SOYBEAN AREA IN EU-27

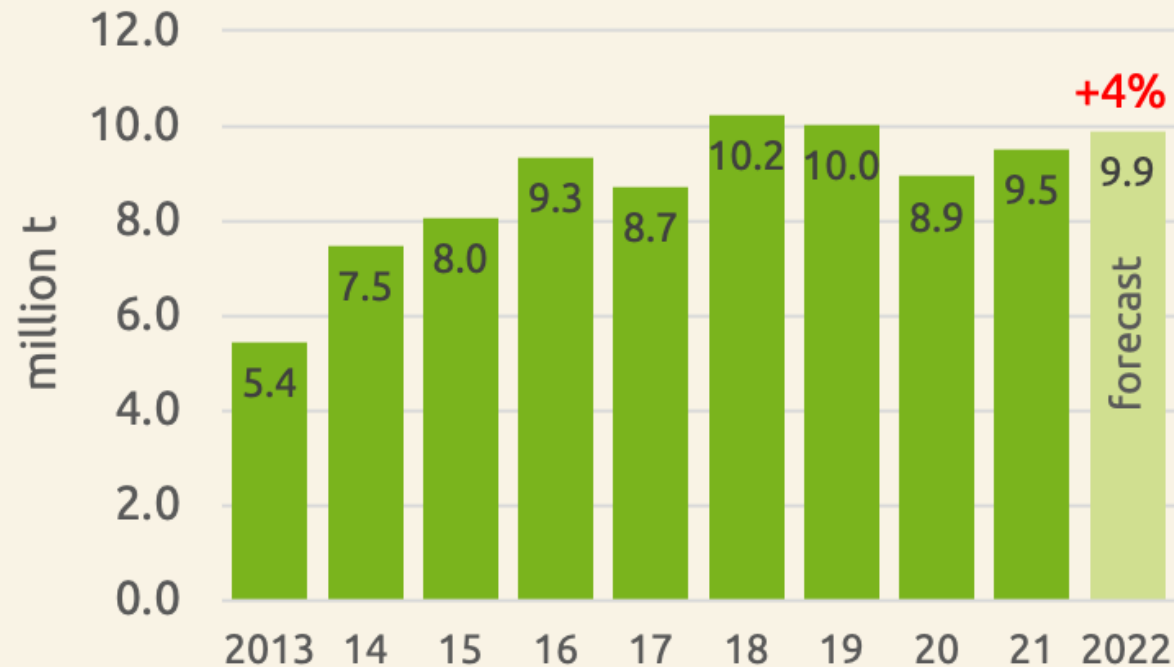
Soybean area development in EU-27 (2013 – 2022 forecast)



Source: Donau Soja

SOYBEAN OUTPUT IN EUROPE

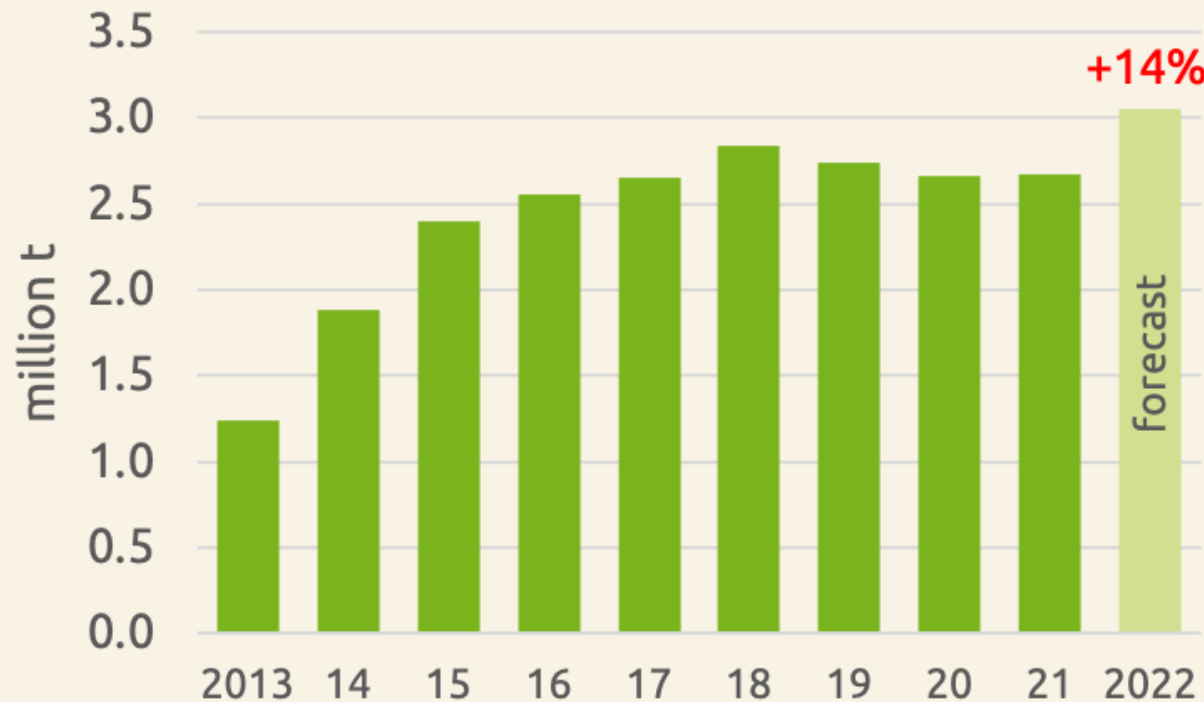
Soybean output development in Europe (2013 – 2022 forecast)



Source: Donau Soja

SOYBEAN OUTPUT IN EU-27

Soybean output development in EU-27 (2013 – 2022 forecast)



Source: Donau Soja

Contacts:

For further information



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Thank you for the attention!