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Development of soya production in Europe, 2006-2020, 2021 (forecast) *Source: Donau Soja Market Report*

Austrian Development Agency



Soybean area development in Europe (2016 - 2021 forecast)



Soybean output development in Europe (2016 - 2021 forecast)



Development of soya production in Europe, 2006-2020, 2021 (forecast) *Source: Donau Soja Market Report*

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Soybean output forecast — change in 2021 (vs 2020) in selected European countries





Development of soya production in Ukraine, 2006-2020, 2021 (forecast)

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Ukraine is self-sufficient with soybeans

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- Ukraine is self-sufficient with soybeans. Ukrainian Soya industry is export oriented.
- Large part of domestically processed soya is exported as soya meal.
- Even after decrease of harvest in last season, the self-sufficient ratio is around 450%.



Export destinations of Ukrainian soybeans in 2020

Country	Volume, 1000 tonnes	%
Turkey	607,7	34,2%
EU	508,7	28,6%
Belorussia	352,8	19,8%
Egypt	88,6	5,0%
Livan	87,2	4,9%
China	67,3	3,8%
Other	66,1	3,7%
Overall	1 778,40	100,0%

Supply & Demand Balance of soya in Ukraine (developed by Donau Soja), 1000 tonnes

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		2018/19	2019/20	2020/21 fact	2020/21 FORECAST
Soybeans	Stocks at the beginning	76	477	65	283
	Area, million hectares	1,72	1,61	1,32	1,28
	Yield, t/ha	2,59	2,30	2,09	2,38
	Harvest	4461	3699	2770	3047
	Import, soybeans	3	16	13	20
	Total Supply, soybeans	4540	4192	2848	3350
Soya Meal, expressed in soybeans	Domestic Processing, soybeans	1610	1389	1101	1200
	Stocks at the beginning of meal	193	206	20	20
	Import of meal	4	5	6	5
	Domestic consumption of meal	625	620	495	600
	Carry over of meal	206	20	20	20
	Export of meal	972	960	612	605
	Export, soybeans	2453	2738	1464	2000
	Carry over / Current Stocks, soybeans	477	65	283	150

Ukraine has the huge potential in terms of volumes and sustainability – increase efficiency of production







Yield gap for wheat

Soya yields in Europe (average for 2016-2020)



Yield gaps (% of yield potential) of rainfed wheat (left). Yield data were collected for a recent period of 10 years; Schils, R. et al. 2018 in European Journal of Agronomy. Plant Production Systems Group, Wageningen University <u>https://doi.org/10.1016/j.eja.2018.09.003</u>

Ukraine has the huge potential in terms of volumes and sustainability – improve crop rotation

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Issues of sustainable soya cultivation in Ukraine (illegal GM)

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As no GM varieties are registered for cultivation in Ukraine, thus growing of GMs is illegal.

Nevertheless, GM seeds and GM cultivation is widely spread in Ukraine. According to market rumours, near 50-65% of soybeans, 10-12% of rapeseeds, and near 1% of corn cultivated in Ukraine are GM.

Agent Green (Romania), with the support of Donau Soja Organisation conducted field investigation in 2018. There were 60 large soya fields sampled in 6 major regions for soya production. The share of GM soya accounted 48% in Ukraine.



Issues of sustainable soya cultivation in Ukraine (pesticides use)

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Pesticides use in soya cultivation:

88 nationally registered active substances for use in plant protection products:

- 3 listed as highly hazardous by WHO (*Beta-Cyfluthrin*, *zeta-Cypermethrin*, *Tefluthrin*);
- 24 not approved in EU (Acetochlor, Acifluorfen, Benomyl, Bifentrin, Glufosinate, Diquat, Dimethoate, Imazethapyr, Carbendazim, Chlorimuron-ethyl, Chlorpyrifos, Novaluron, Prometryn, Propargite, Propisochlor, Propiconazole, Tepraloxydim, Theflutrin, Thiram, Trifluralin, Fipronil, Flumetsulam, Phosalone, Quizalofop-p-tefuron).

Mentioned pesticides are actively used. For example, Chlorpyrifos was used on 45% of soya areas in Ukraine in 2019 (data of State Statistics Service of Ukraine).

Issues of sustainable soya cultivation in Ukraine (adaptation to climate change)

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Addressing climate challenges requires **implementation of new agricultural practices and technologies.**

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%;
- extra-rainy season 2021 was better for average soya yield in Ukraine, but lead to partly loses by certain farmers.



Directions of Donau Soja Organisation Activities in Ukraine

- Improvement of sustainability practices for UA soya farmers;
- Protein Partnership Programme to increase sustainably produced volumes;
- Quality Assurance (Donau Soja & Europe Soya Standards);
- Market Development linking quality producers to Western European markets;
- Government Relation support development of trade conditions and sustainability regulation.





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Improvement of sustainability practices for UA soya farmers

- experience exchange within the framework of the Donau Soja field days in European countries;
- Donau Soja Study Program for farmers (inc. -Protein Partnership trainings) & Soya Discussion Club – opinion leaders and experts discussion about best practices of sustainable soya cultivation online with translation on Facebook;
- cooperation with leading Ukrainian agricultural Universities – special programme on sustainable soya cultivation for students.



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Donau Soja Organisation owns the quality standards for soya cultivation and processing

Donau Soja and Europe Soya

that guarantee sustainability, non-GM and European origin



Donau Soja Quality Assurance and Integrity Programme

- witness audits of farmers and collectors;
- coordination of sampling and control on laboratory results for GM and pesticides residues;
- office audits of Certification Bodies;
- supervisory audits of farmers and collectors;
- Land Use Research project.



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Thank you for the attention!

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