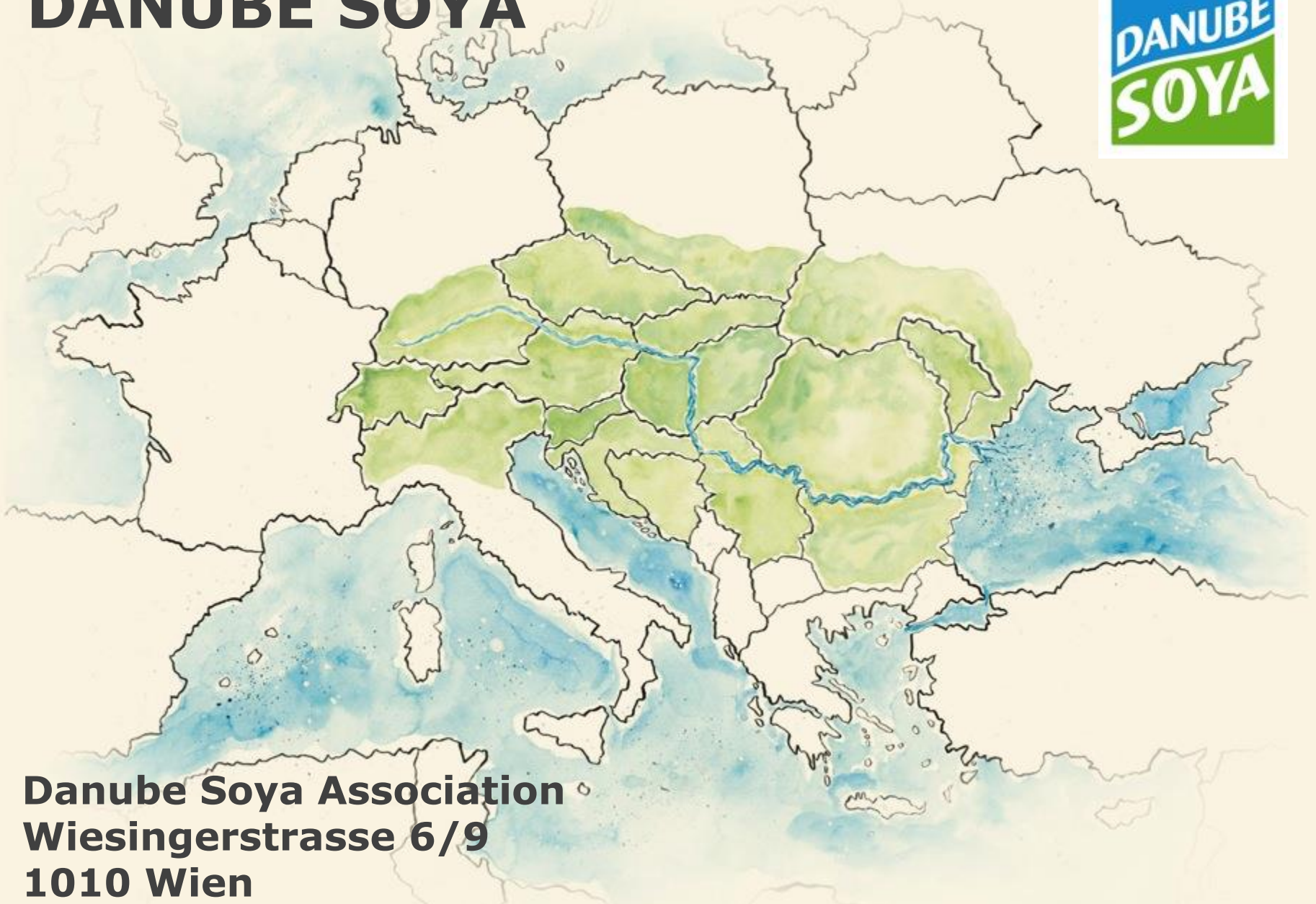


DANUBE SOYA



Danube Soya Association
Wiesingerstrasse 6/9
1010 Wien



Danube Soya Offices

Vienna Office
Responsibilities: CZE,
SVK, GER, SUI, ITA,
POL

Regional
Office,
Chisinau

Representative,
Basel

Representative,
Veneto

Headquarter,
Vienna

Regional
Office,
Novi Sad

Regional
Office,
Bucharest

Bucharest Office
Responsibilities: UKR,
MDA, ROU, BUL

Novi Sad office
Responsibilities: SRB,
BIH, CRO, HUN, SLO



Danube Soya beans are...

... from the Danube Region

... GMO free

- EU (ILO) social & labour standards
- EU Pesticide Legislation
- Agricultural Land, only before January 2008



AREA DEFINITIONS:

GERMANY: Bavaria, Baden Württemberg

ITALY: Trentino Alto Adige, Friuli Venezia Giulia, Veneto, Emilia-Romana, Lombardia, Piemont, Vallée d'Aoste

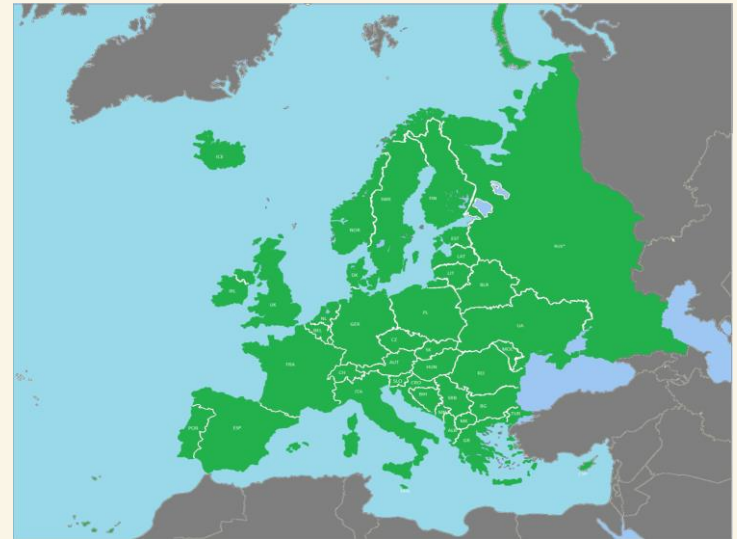
POLAND: Dolnoslaskie, Opolskie, Slaskie, Swietokrzyskie, Podkarpackie, Malopolske

UKRAINE: Uschgorod, Tschernowzy, Winniza, Odessa, Lwow, Ternopol, Chmelniczki, Iwano-Frankovsk



Same Guidelines as Danube Soya, but 2 differences:

- Geographical scope: Whole Europa instead of Danube Soya
- **Euro Soya** No label for consumers: certification only until compound feed producers/farm self-mixers



Soya has Tradition in Europe

Cultivated plant from Eastern Asia.
Domesticated over 5000 years ago.
Climate in Europe similar to Northern China/Japan



Engelbert Kaempfer

(German botanist; 1651-1716)
Publication: *Amoenitatum exoticarum*
appeared in 1712.



Prof. Friedrich Haberlandt (1826-1878)

- Haberlandt received soybean seeds from Chinese and Japanese participants of the **Vienna World Exposition in 1873**.
- Between 1875 and 1877, he **organized largescale soybean cultivation trials** with more than 150 participants from all-over the Austrian-Hungarian empire.
- Publication “Die Sojabohne”

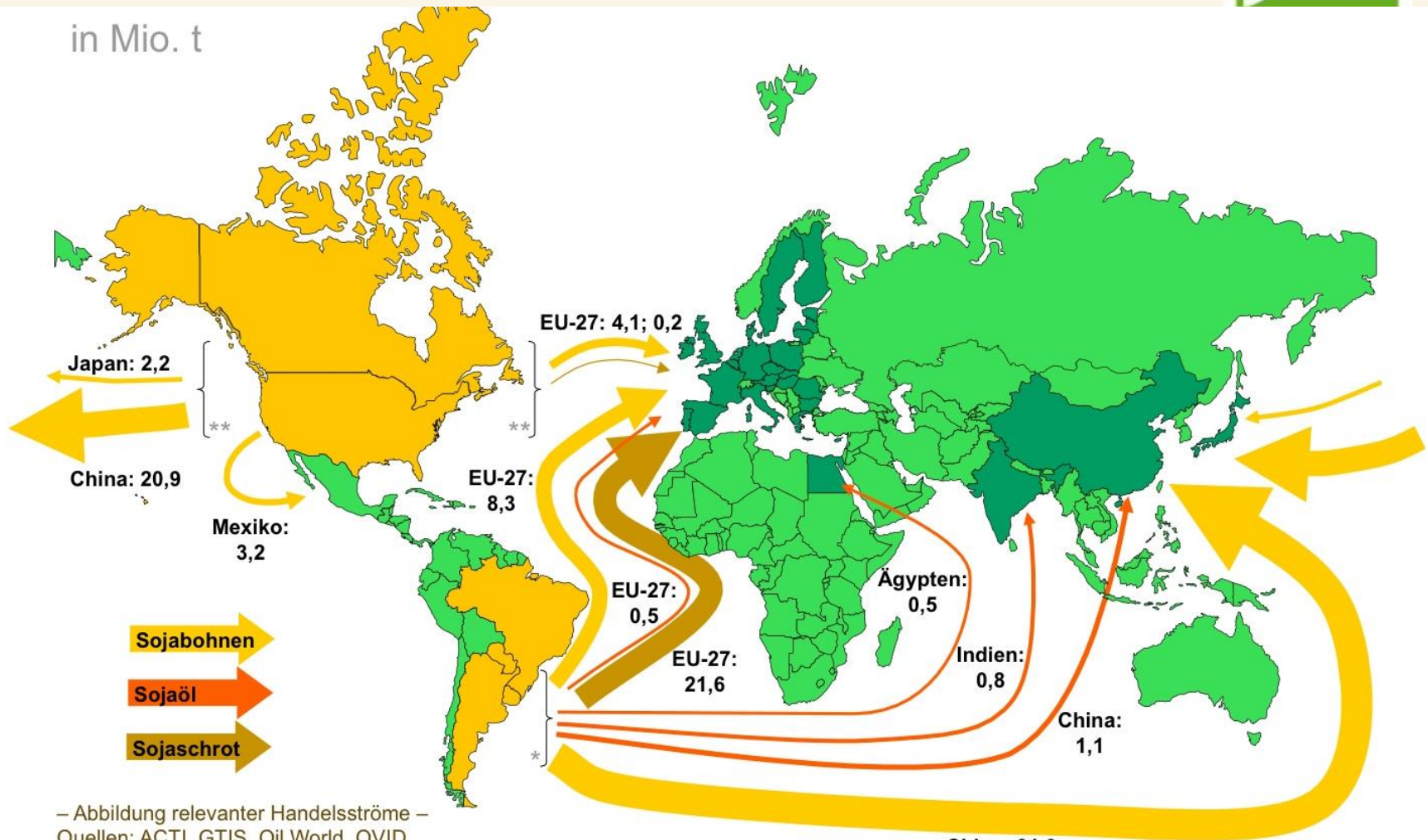


Since 1920s soya breeding in Europe

Trade streams worldwide soya beans, oil and meal 2011



in Mio. t



– Abbildung relevanter Handelsströme –
 Quellen: ACTI, GTIS, Oil World, OVID
 © OVID 2012

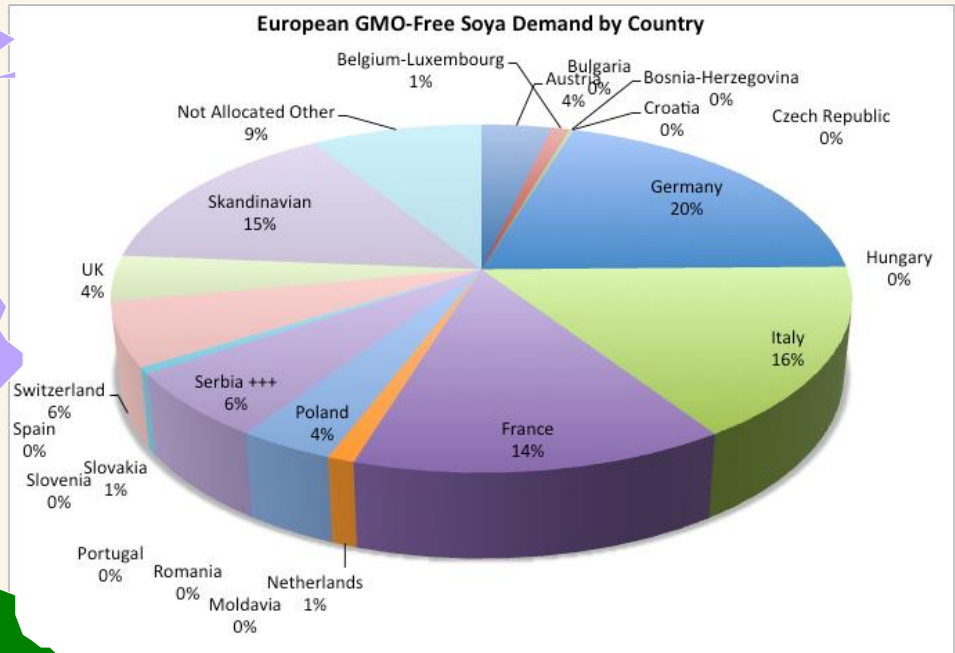
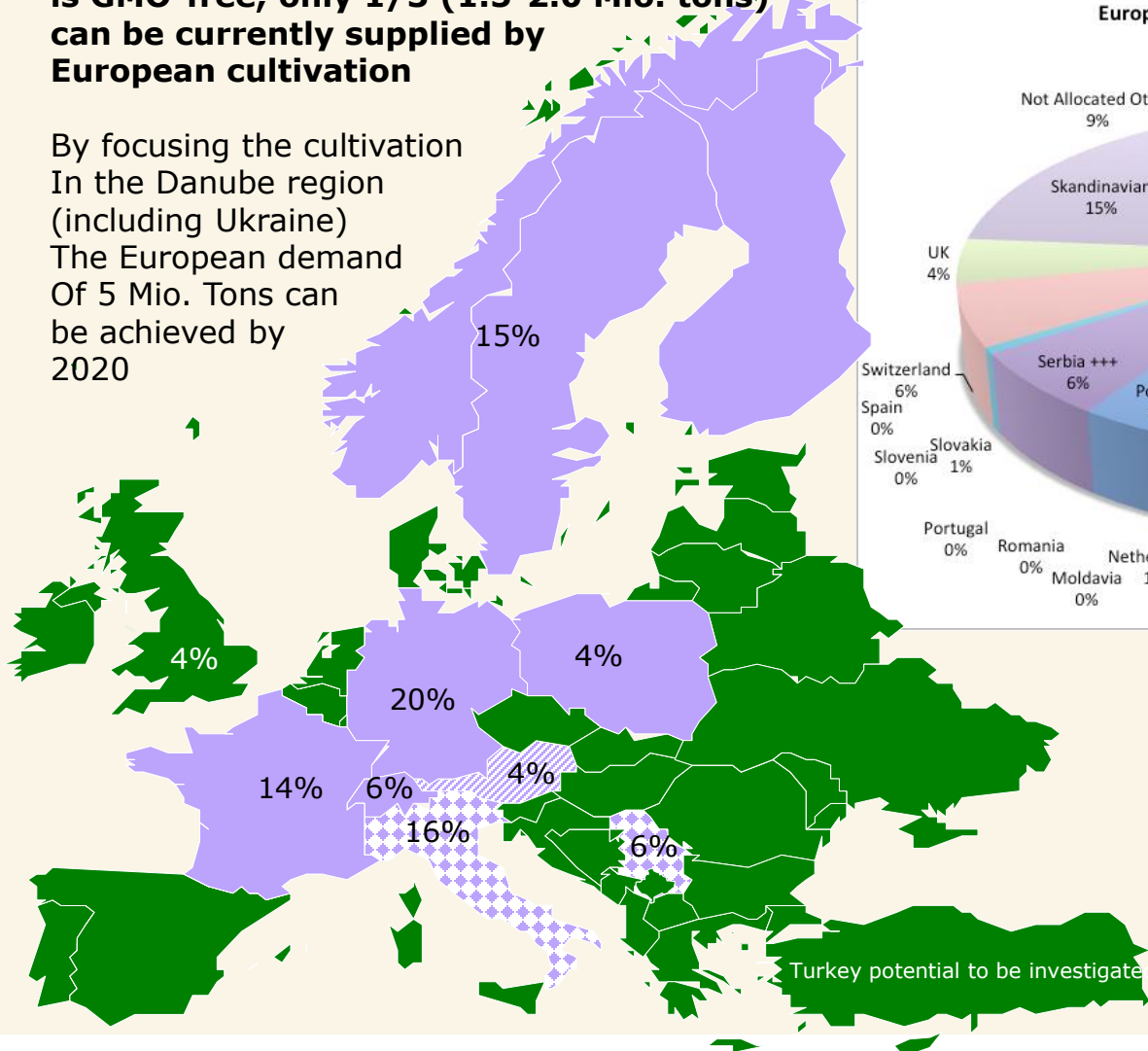
Ursprungsländer | *Brasilien + Argentinien + Paraguay + Uruguay | ** USA + Kanada

GMO-free Soya Demand in Europe: 5 Mio. to Soya Meal (7 Mio. tons Soya equivalent)



12% (5 Mio. tons) of Europe Soya demand is GMO-free, only 1/3 (1.5-2.0 Mio. tons) can be currently supplied by European cultivation

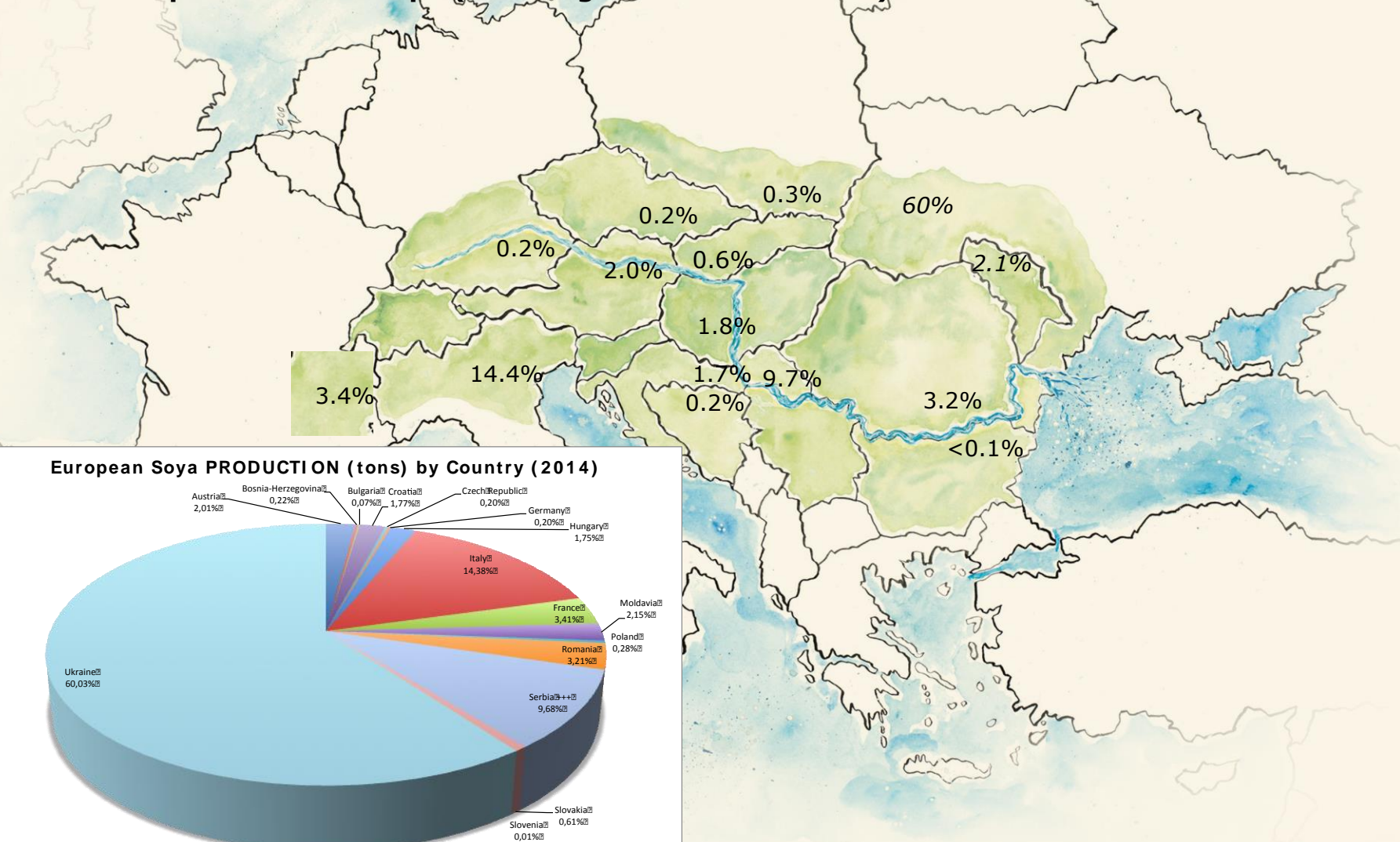
By focusing the cultivation In the Danube region (including Ukraine) The European demand Of 5 Mio. Tons can be achieved by 2020



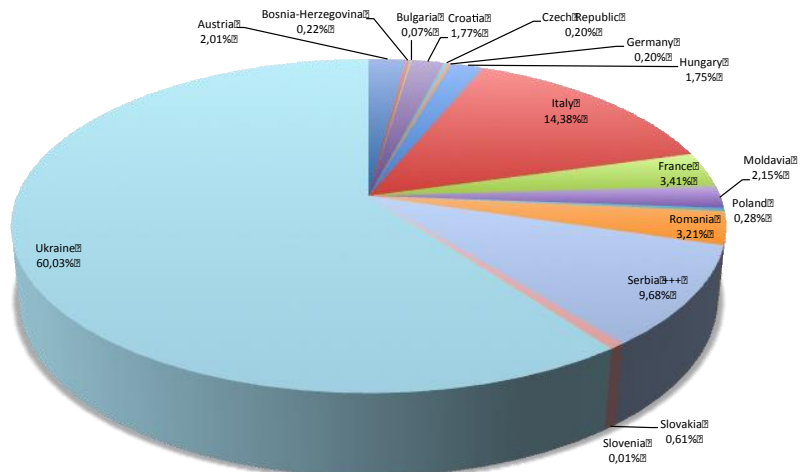
- Primarily self-sufficient cultivation, some imports
- Primarily import need
- Could be self-sufficient but Main production exported for food, import for feed

Total Soya Production in Europe (tons)

The total Soya Production in Europe is increasing. By 2015 an estimated 7.7M tons will be produced in Europe (including Ukraine and France)



European Soya PRODUCTION (tons) by Country (2014)

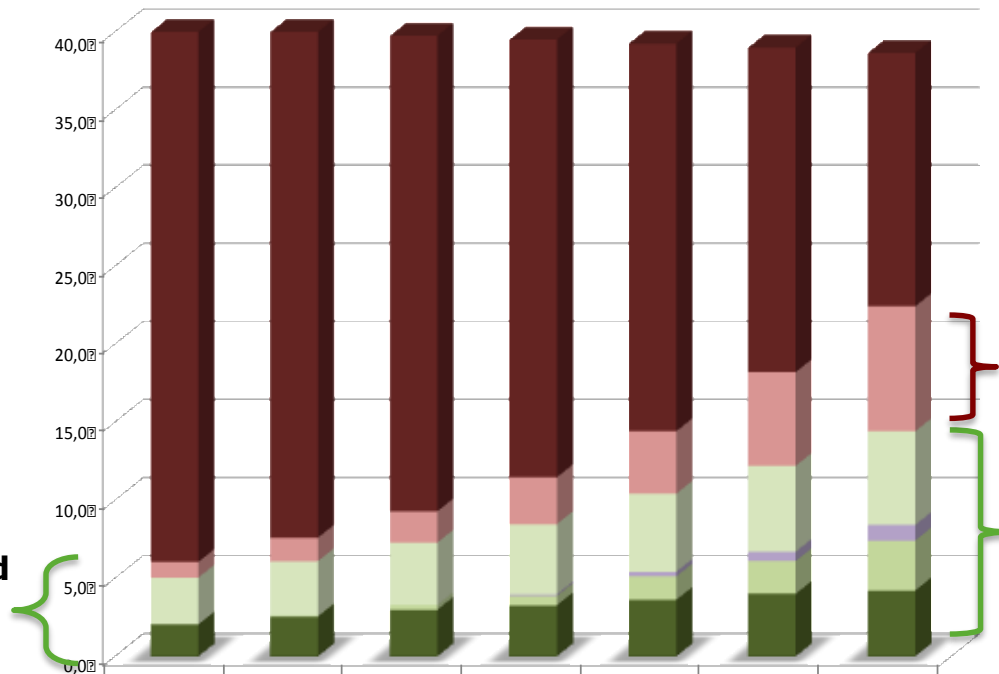


Source: USDA, 2014, own work

Mid-Term Outlook: Europe has the potential to increase supply from 5 Mio up to > 8 Mio. Tons



Sourcing of the european Protein (Soya) Feed Demand Scenario until 2020



Current GMO-free demand of 5 Mio. t in Europe is covered 1/3 by European production.

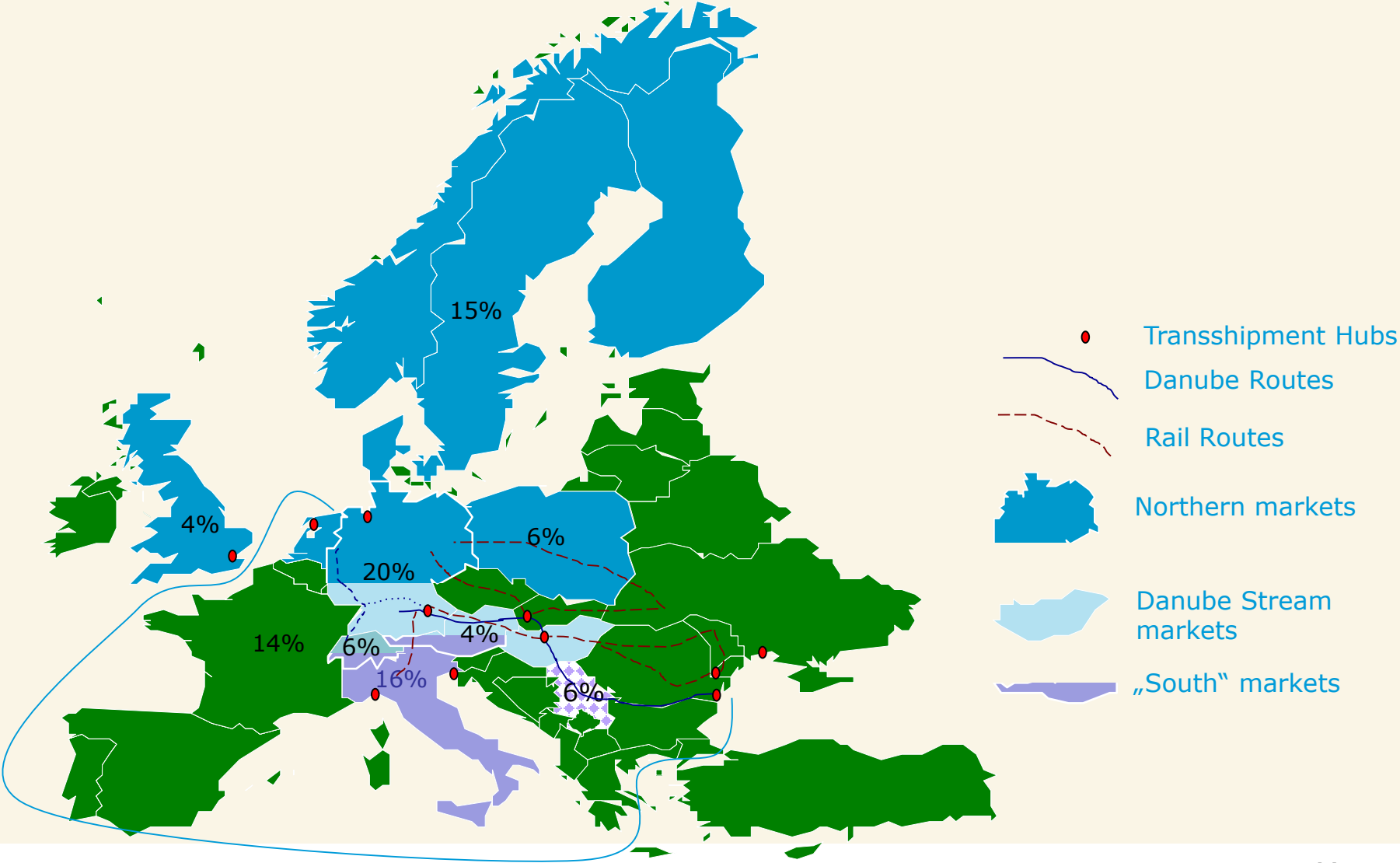
Further demand may be covered by certified (RTRS) sourcing

By pushing also other legumes and better use of land (grass) in a long run even higher self-sufficiency is possible

European & Overseas ProTerra Soya is able to fulfill 1/3 of Europe's protein meal needs

	2014	2015	2016	2017	2018	2019	2020
■ Non-certified GMO Soya	34,0	32,4	30,5	28,0	24,8	20,8	16,2
■ Certified GMO Soya (RTRS)	1,0	1,5	2,0	3,0	4,0	6,0	8,0
■ Overseas GMO-free Soya (ProTerra)	3,0	3,5	4,0	4,5	5,0	5,5	6,0
■ Potential European GMO-free other legumes/better land use	0,0	0,0	0,0	0,1	0,3	0,6	1,0
■ Potential Ukraine GMO-free Soya (incl. Danube/Euro Soya)	0,0	0,1	0,3	0,6	1,5	2,1	3,2
■ Potential European GMO-free Soya (incl. Danube/Euro Soya)	2,1	2,6	3,0	3,3	3,6	4,0	4,2

Potential GMO-free soya feed market streams from the Danube Region production



DANUBE
SOYA



Pouletbrust
Blancs de poulet
Petto di pollo

DATE	25.12.14	Code	958
55,00	0,296	Fr.	16,30

Bell

Freiland-Poulet
élevé en plein air
Pollo allevamento all'aperto

STORAGE EN PLEIN AIR

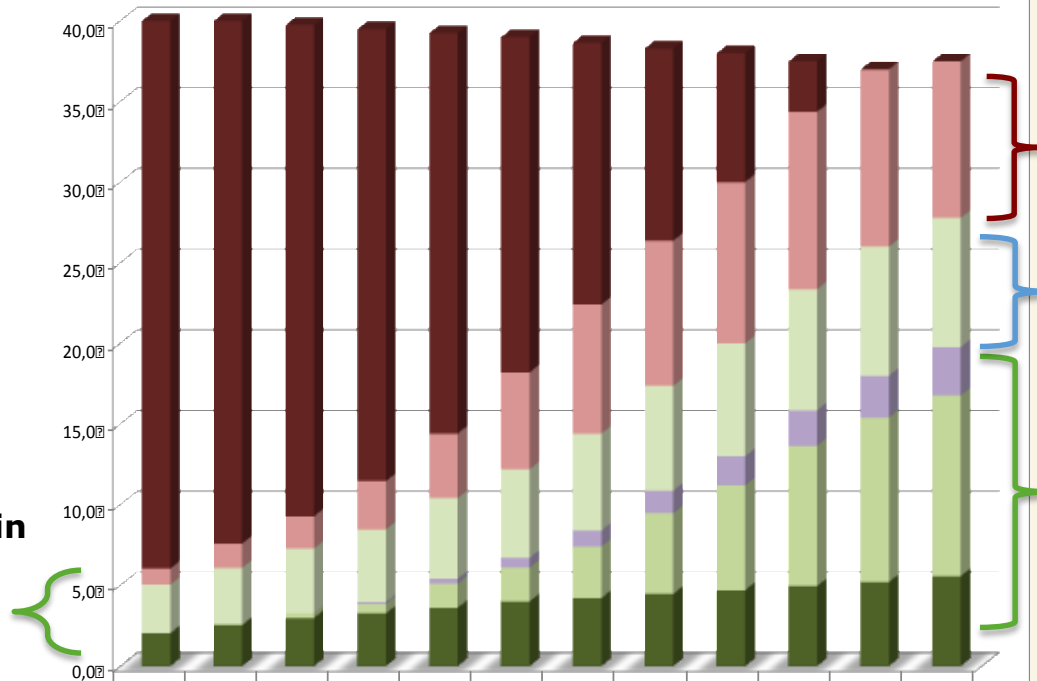
naturafarm
FREILANDHALTUNG

NOUVEAU ALL'AVVERO

Vision 2025. Europe has the potential to become self-sufficient by 50% of current soya meal demand



Sourcing of the European Protein (Soya) Feed Demand Scenario until 2025



Current GMO-free demand of 5 Mio t in Europe is covered 1/3 by European production.

Rest of demand may be covered by certified (RTRS) sourcing

Current ProTerra certified production from overseas can bridge part of the gap

European protein production is able to fulfil 50% of protein feed (current soya basis).

By pushing also other legumes and better use of land (grass) in a long run even higher self-sufficiency is possible

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Non-certified GMO Soya	34,0	32,4	30,5	28,0	24,8	20,8	16,2	11,9	8,0	3,1	0,0	0,0
Certified GMO Soya (RTRS)	1,0	1,5	2,0	3,0	4,0	6,0	8,0	9,0	10,0	11,0	11,0	9,7
Overseas GMO-free Soya (ProTerra)	3,0	3,5	4,0	4,5	5,0	5,5	6,0	6,5	7,0	7,5	8,0	8,0
Potential European GMO-free other legumes/better land use	0,0	0,0	0,0	0,1	0,3	0,6	1,0	1,4	1,8	2,2	2,6	3,0
Potential Ukraine GMO-free Soya (incl. Danube/Euro Soya)	0,0	0,1	0,3	0,6	1,5	2,1	3,2	5,0	6,5	8,7	10,2	11,2
Potential European GMO-free Soya (incl. Danube/Euro Soya)	2,1	2,6	3,0	3,3	3,6	4,0	4,2	4,5	4,7	5,0	5,2	5,6