soja netzwerk schweiz
réseau suisse pour le soja
rete svizzera per la soia
soy network switzerland

Annual Report: Swiss Soya Network

April 2026

2025

Contents

Foreword

New genetic engineering: between regulation and innovation

Global soya production today amounts to approximately 75 per cent of conventionally genetically modified varieties. Against this backdrop, the Swiss agricultural and food industry has successfully established itself as GMO-free. With the emergence of new genomic technologies (NGTs) such as CRISPR/Cas, the sector now faces a factual reassessment of the regulatory framework. Both in the European Union and in Switzerland, intensive political processes are currently underway regarding the future authorisation and labelling of NGT plants. The Swiss Federal Council has presented draft legislation that provides for a differentiated approach to plants, provided they have been modified without the use of foreign genetic material.

For the Swiss Soya Network, the international compatibility of national legislation is of central importance in this debate. Close alignment with the EU is essential to avoid trade barriers and to secure the long-term competitiveness of the Swiss agricultural and food industry. New varieties should also offer clear benefits that contribute directly to sustainability. The major advantage of NGT lies in the speed and precision with which soya varieties can be adapted to the specific climatic and ecological conditions in our growing regions. Early maturity, drought and heat tolerance, reduced use of plant protection products and nitrogen fixation are just some of the new possibilities.

However, it is crucial that NGTs, in whatever form, are clearly regulated within the supply chain and that there is no arbitrariness in terms of declaration, verifiability and traceability. There are currently more questions than answers on this matter. The network will constructively support the ongoing process regarding NGTs both domestically and abroad in order to safeguard the successful model and the good reputation of livestock feeding in Switzerland.

I would like to thank all members for their commitment and dedication to actively shaping the future of the Swiss food industry.

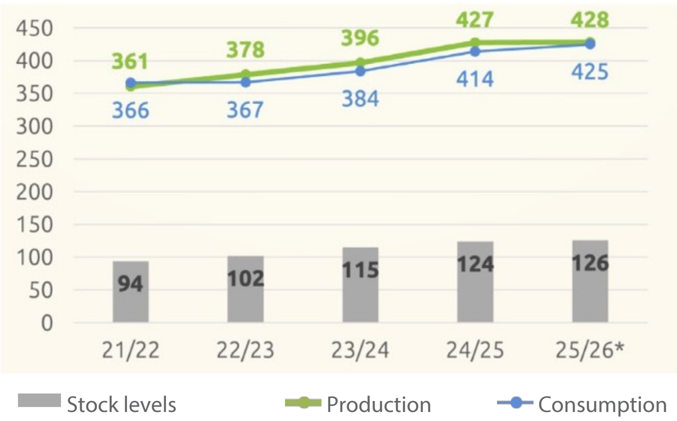
Fortunat Schmid
President of the Swiss Soya Network

Market development

Global and European production

Global soya production reached a new record high in the 2024/25 marketing year. According to forecasts by the US Department of Agriculture (USDA), global production rose to around 420.6 to 428.2 million tonnes (Mt), representing an increase of approximately 6% compared with the previous season. Brazil consolidated its role as the world's largest producer with a record harvest of an estimated 169 million tonnes, followed by the USA with approximately 118 million tonnes (source: USDA).

Global supply balance for soybeans including ending stocks (in million tonnes)



Note: * Forecast

Source: USDA

In Europe, the positive trend in soya cultivation is continuing, even though total volumes remain modest compared to overseas. The organisation Donau Soja forecasts a total cultivation area in the EU, including Ukraine and Serbia, of 3.6 million hectares for 2025. Despite a slight decline in acreage compared to the record year of 2024, higher expected yields mean that EU production of GMO-free soya is likely to remain stable at around 2.8 to 2.9 million tonnes (source: Donau Soja / DG AGRI). Whilst Europe accounts for only around 3% of the total volume on the world market, its share of the globally available GMO-free soya amounts to 20% to 25%.

Price trends

Whilst prices for conventional GMO soya on the global market fell due to record supply, premiums for GMO-free goods developed differently:
The production of GMO-free soya in Brazil fell to a historic low of just 1.5 to 2.0 million tonnes. This led to a massive increase in costs for segregation and logistics (IP handling), which made Brazilian GMO-free soya increasingly unattractive to European buyers. The prices

Prices for European GMO-free soya beans settled at around EUR 410–430 per tonne in spring 2025. The Premiums for GMO-free soya meal above the conventional price ranged from 90 to 130 EUR/t (source: ENGA / Donau Soja).

n Germany

Three questions for Martin Miersch,

Managing Director of Deutscher Sojaförderring e.V.

Soya Network: According to a study by the German Soya Promotion Association, thanks to climate change, advances in plant breeding and the commitment of pioneering companies, around 60% of the soya required in Germany could be produced domestically. However, to date only around 3.5% of the soya beans required annually in Germany are produced within the country. What is causing farmers to hesitate?

Martin Miersch: There is no simple answer to this question. Let's start with yield and profitability. Farmers who take up soya cultivation often achieve only low yields of 15–25 dt/ha if they have not familiarised themselves sufficiently with the crop. Many throw in the towel after the first year. In contrast, well-trained farm managers who also place great emphasis on soybean cultivation regularly achieve yields in the range of 35 to 50 dt/ha. On these farms, soybeans are among the most profitable arable crops.

Unfortunately, there have been repeated instances of uncertainty and abrupt changes to the eligibility criteria for government subsidies for the cultivation of grain legumes in the past. Politicians also frequently overestimate the potential volume for the use of soya in tofu, soya drinks or meat substitutes. Instead, equal attention should be paid to the domestic cultivation of feed soya. This is where the large volumes lie. Very helpful would be if, for example, government meat labelling schemes and major retail brand programmes such as '5D', took into account not only the farming method but also the origin of the feed.

In future, the Sojaförderring will cooperate more closely with the collection trade. We aim to ensure that farmers can deliver soya to more locations than before and that more attractive producer prices can be paid thanks to savings in logistics between collectors and crushers.

Finally, there is the highly unsatisfactory situation regarding herbicides. In Austria, where soya is now the crop with the fourth-largest area under cultivation, more effective soya herbicides have long been authorised than in Germany. In 2026, flufenacet and metribuzin will also be withdrawn in Germany due to authorisation restrictions. Two potent and well-tolerated active ingredients for soya cultivation, with a market share of around 80%, have been lost! The Soya Promotion Association has therefore submitted an application for emergency authorisation for the pre-emergence herbicide Proman.

Soya Network: The cultivation of European soya beans is considered sustainable. Is this true in practice, and where do you see the greatest challenges for sustainable soya cultivation in Germany (ecological, social and economic)?

Martin Miersch: Unlike peas, field beans and lupins, soya beans are not affected by legume fatigue. A soya bean content of one-third in a crop rotation is possible, provided that no other plants susceptible to Sclerotinia are included in the rotation. Furthermore, soya combines the agronomic benefits of grain legumes with a low autumn N_{min} content, and thus leaves behind only small amounts of potentially leachable nitrogen. Soya can also help provide solutions to crop rotation problems such as the reed leafhopper in beet and potatoes, and the increasing insect pressure in

Side note: Germany

rapeseed or the mass proliferation of black grass in cereal-dominated cropping systems. Finally, more domestically grown soya could strengthen our food sovereignty, as supply chains would become more resilient.

When it comes to reducing greenhouse gas (GHG) emissions, such as
e.g. CO_2 , we need to look closely. Contrary to what is often claimed, the GHGs emitted during the overseas transport of soya are of rather minor significance in the overall balance. Far more important is the type of land use – e.g. the conversion of rainforest or peatlands into arable land, the details of agricultural production techniques and, finally, the energy consumption involved in soya processing. Accordingly, domestically produced soya is not necessarily superior to imported soya in terms of GHG emissions.

Together with its contract soya farmers, the German tofu manufacturer Taifun is working on concepts for establishing flowering plants in organically farmed soya fields.

I find an approach by the tofu manufacturer Taifun very promising. Together with its contract soya farmers, the company is working on concepts for establishing flowering plants in organically farmed soya fields. Because soya beans grow slowly at first, flowering plants are sown between the soya rows to provide food for wild bees and other insects.

Soya Network: The EU Deforestation Regulation (EUDR) has already been postponed twice. The German Soya Promotion Association has spoken out strongly against the EU's implementation proposals. How does the association currently assess the chances of the EUDR being implemented? Have there also been any positive outcomes from the discussions and developments surrounding the planned regulation?

Martin Miersch: The EUDR aims to ensure that forests are no longer converted on a large scale into arable or grassland. This is an important and sensible objective, which the Soya Promotion Association supports. Instead of engaging in dialogue with the affected countries and regions to seek solutions, the European Commission has chosen a different path. Soya cultivation and cattle farming are being placed under general suspicion of contributing to deforestation, and those involved are to be burdened with nonsensical bureaucratic red tape. When I speak to our members about this, I encounter incomprehension and anger. A pioneering farm that has been sourcing regional soya beans for 25 years has announced that it will dump several tonnes of domestic soya beans into the Rhine in a publicity stunt should the EUDR actually become law. In short: the EUDR is unacceptable in its current form.

Following the EUDR, the European Commission is already brandishing the next big stick to throw a spanner in the works of the European soya industry. If the Commission's proposals are adopted, soya beans are to be categorised across the board as a raw material with a high risk of indirect land-use change (high-iLUC). Mind you, all soya beans, not just those from known high-risk countries. As with the EUDR, the Commission's preferred tool is the shotgun, not the scalpel. Soya oil, regardless of its origin, would then no longer be permitted to be processed into biodiesel. The value of European soya beans would thus be generally reduced, as the attractive and secure marketing of the oil as a fuel would cease.

Import statistics 2025

Feed soya

In 2025, a total of 266,557 tonnes of feed soya were imported into Switzerland under the three tariff headings 2304.0010, 1201.9010 and 1201.9021, according to Réservesuisse. 13 importers reported imports to the Soya Network. Together with the figures reported by Bio Suisse, this meant that 99.2% of soya imports could be accounted for.

Soybean imports for animal feed in 2025

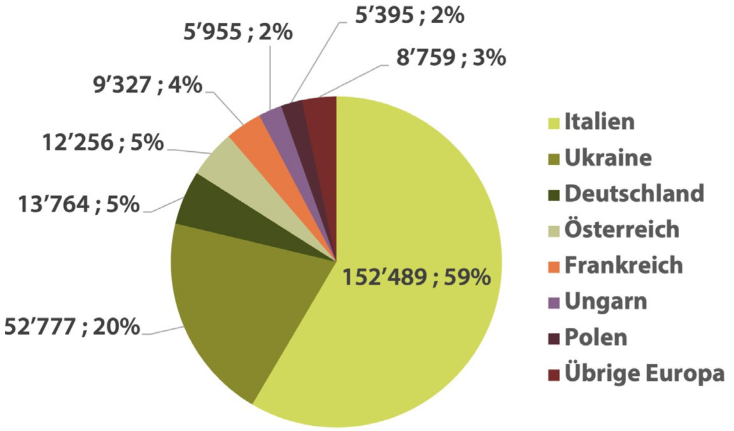
Raw materials	Tariff code	Imports according to Réservesuisse (t)	Imports by supplier (t)
Soya oil cake	2304.0010	259,978	258,189
Soya beans	1201.9010	1,146	728
Soya beans	1201.9021	5,434	5,619
Total		**266,557**	**264,537**

Source: Réservesuisse

Almost 98% of feed soya beans were imported from European producing countries. The main producing countries in Europe are Italy with 152,489 tonnes (57.2%), Ukraine with 52,777 tonnes (19.8%), Germany with 13,764 tonnes (5.2%) and Austria with 12,256 tonnes (4.6%).

5,698 tonnes of feed soya were imported into Switzerland from India. Switzerland did not import any feed soya from Brazil. This underscores the successful strategy of the Soya Network to reduce dependence on overseas supply chains in favour of shorter, European routes.

European countries of origin for feed soya imports in 2025



Source: Soja Netzwerk / Réservesuisse

Origin of feed soya imports in 2025

	Imports (t)	Share in %
Europe	260,722	97.8%
India	5,698	2.1%
Other	137	0.0%
Total	**266,557**	**100%**

Source: Soya Network / Réservesuisse

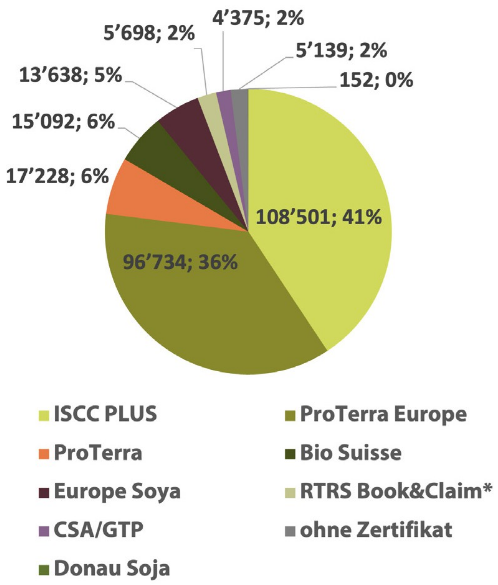
Import statistics 2025

Ten buyers imported 100% sustainably certified feed soya. Two buyers achieved a share of between 94% and 100%. One buyer failed to meet the targets. This results in a total market share of 96% for soya imports certified to recognised sustainability standards.

Share of leading standards in feed soya imports in 2025

	Imports in tonnes	Share in %
Bio Suisse	15,092	5.7%
CSA/GTP	4,375	1.6%
Danube Soya	152	0.1%
Europe Soya	13,638	5.1%
ISCC PLUS	108,501	40.7%
ProTerra	17,228	6.5%
ProTerra Europe	96,734	36.3%
RTRS Book&Claim*	5,698	2.1%
excluding certificates	5,139	1.9%
Total imports	**266,557**	

** Book&Claim (= certificate trading) not recognised by the Soya Network.*



Source: Bio Suisse, Soya Network

Feed grain

According to Réservesuisse, a total of 397,168 tonnes of feed grain were imported into Switzerland in 2025. The imports reported by the 15 procurers amounted to 371,419 tonnes. These 15 procurers account for 93.3% of the market for wheat, 95.3% for barley and 90.4% for oats.

Feed grain imports 2025

Commodity	Tariff code	Imports according to Réservesuisse (t)	Imports by procurers (t)	Market coverage
Wheat	1001.9939	306,424	285,743	93.3%
Barley	1003.9059	74,944	71,398	95.3%
Oats	1004.9039	15,799	14,278	90.4%
Total		**397,168**	**371,419**	

Source: Soya Network / Réservesuisse

According to Réservesuisse, the majority of feed wheat imports came from France (47.1%) and Germany (33.5%). Romania accounted for 9.2% and Hungary for 7.9% of feed wheat imports. 94% of feed barley came from Germany, France, Hungary and the Czech Republic, and 99% of feed oats from France, Germany, the Czech Republic and Finland.

14 out of 15 purchasers received a certificate from their suppliers stating 'no desiccation with synthetic plant protection products' for all reported imports. All purchasers carried out the glyphosate analyses in accordance with the control concept and thus met the requirements. All glyphosate analyses were negative, i.e. they had a value of <0.01 mg glyphosate/kg feed.

Broken rice and maize gluten

According to Réservesuisse, 53,253 tonnes of broken rice were procured from Brazil, Myanmar and Italy in the reporting year. Procurement agents in the Soya Network accounted for 49,288 tonnes, or 92.6%, of these imports. 77% of this was procured with certification, and 19% with supplier verification to exclude deforestation, child labour and food competition (Feed no Food).

In 2025, maize gluten was sourced exclusively from Europe for the first time. The main European countries of origin were France, Austria, Bulgaria and Spain.

Imports of broken rice and maize gluten in 2025

Raw material	Tariff code	Imports according to Réservesuisse (t)	Imports by procurer (t)	Market coverage
Broken rice	1006.4029	53,253	49,288	92.6%
Maize gluten	2303.1018	41,863	41,889	100.1%

Source: Soya Network / Réservesuisse

Communication and Stakeholders

EUDR compliance

When comparing 20 international soy standards in terms of their compliance with the EU Deforestation Regulation (EUDR), the leading standards accepted by the Soy Network performed best. The Profundo Benchmark 2025 EUDR Compliant Plus confirms that the soy standards ISCC EU, ISCC PLUS, ProTerra, RTRS, Donau Soja and Europe Soya demonstrate the highest level of compliance with the EUDR. For example, the leading standards have developed specific EUDR modules to ensure traceability down to the plot and meet geodata requirements, or they provide guidelines for farmers to generate reference numbers for the EU database (TRACES). Furthermore, they all go beyond the EUDR by, for example, also prohibiting the conversion of ecosystems worthy of protection, such as the Cerrado.

For the Swiss Soya Network, this means that the guiding standards form a robust basis for EUDR compliance. Given that **96%** of Swiss feed soya imports are certified according to these guiding standards, the Swiss feed industry is well placed to meet future EUDR requirements.

Commitment to the Amazon Soy Moratorium

In September 2025, the Soya Network co-signed a letter from ENSI (European National Soya Initiatives) calling for the Amazon Soya Moratorium to be maintained. The organisations called on the international traders ADM, Bunge, Cargill, LDC, COFCO, Amaggi and the ABIOVE association to guarantee the long-term protection of valuable ecosystems and not to jeopardise the acceptance of soya imports into Europe.

Controversy over Globi book

Towards the end of the year, a new Globi book sparked a controversial debate about rainforest soya. False claims were exposed, leading to a veritable wave of outrage on social media. During this period of public criticism, the Soya Network Switzerland was highlighted by the media (including 20 Minuten) as a key reference point. The network was able to demonstrate that Swiss livestock farming is already largely based on certified, deforestation-free sources. The publisher apologised for the mishap, provided bookshops with a corrigendum and corrected the erroneous passages in the new edition.

Annual accounts

2025 Annual Report

Bilanz	31.12.2025		31.12.2024	
	CHF	%	CHF	%
AKTIVEN				
Flüssige Mittel	**126'714.32**	**100.0**	**96'090.32**	**100.0**
Post	126'714.32		96'090.32	
Umlaufvermögen	**126'714.32**	**100.0**	**96'090.32**	**100.0**
TOTAL AKTIVEN	**126'714.32**	**100.0**	**96'090.32**	**100.0**
PASSIVEN				
Verbindlichkeiten aus Lieferungen und Leistungen	**48'786.25**	**38.5**	**36'571.30**	**38.1**
Kreditoren	48'786.25		36'571.30	
Passive Rechnungsabgrenzungen	**2'775.00**	**2.2**	**2'700.00**	**2.8**
Kurzfristiges Fremdkapital	**51'561.25**	**40.7**	**39'271.30**	**40.9**
Vereinsvermögen zu Beginn Geschäftsjahr	**56'819.02**		**41'155.21**	
Vermögensvorschlag	**18'334.05**		**15'663.81**	
Eigenkapital am Ende des Geschäftsjahres	**75'153.07**	**59.3**	**56'819.02**	**59.1**
TOTAL PASSIVEN	**126'714.32**	**100.0**	**96'090.32**	**100.0**

Annual accounts

Income Statement 2025

Erfolgsrechnung	IST 01.01. - 31.12.2025		Budget 2025		IST 01.01.-31.12.2024	
	CHF	%	CHF	Abw.%	CHF	%
Ertrag	**163'500.00**		**165'000.00**		**167'000.00**	
Statutarische Mitgliederbeiträge	163'500.00	100.0	165'000.00		165'000.00	98.8
Sonstige Erlöse	0.00	0.0	0.00		2'000.00	1.2
Total Ertrag	**163'500.00**	**100.0**	**165'000.00**	**-0.9**	**167'000.00**	**100.0**
Aufwand						
Medienanlass, Medienreise	-378.35		-2'000.00		-378.35	
Website, Newsletter, Faktenblätter	-487.65		-1'500.00		-2'044.30	
Mitgliederversammlung	-1'076.60		-6'000.00		-6'115.30	
Studien	0.00		0.00		-1'137.84	
Buch- und Kontoführung	-2'645.75		0.00		-4'694.60	
Total Kommunikation	**-4'588.35**	**-2.8**	**-9'500.00**	**-52**	**-14'370.39**	**-8.6**
Stichprobenkontrolle	-15'634.65		-13'000.00		-19'539.50	
Benchmark, Witness Audits	0.00		-10'000.00		0.00	
Total Qualitätsmanagement	**-15'634.65**	**-9.6**	**-23'000.00**	**-32**	**-19'539.50**	**-11.7**
Vereinsleitung	-45'991.45		-50'000.00		-49'676.25	
Kommunikation	-12'433.70		-25'000.00		-24'400.35	
Qualitätsmanagement	-19'117.45		-20'000.00		-28'858.60	
Supply Chain Management	-45'349.25		-30'000.00		-14'411.10	
Spesen	-1'304.75		-2'000.00		-80.00	
Total Geschäftsstelle	**-124'196.60**	**-76.0**	**-127'000.00**	**-2**	**-117'426.30**	**-70.3**
Ausserordentlicher Aufwand	-671.35		0.00		0.00	
Direkte Steuern	-75.00		0.00		0.00	
Total Übriger Aufwand	**-746.35**	**-0.5**	**0.00**		**0.00**	**0.0**
Total Aufwand	**-145'165.95**	**-88.8**	**-159'500.00**	**-9**	**-151'336.19**	**-90.6**
Vermögensvorschlag	**18'334.05**	**11.2**	**5'500.00**	**3**	**15'663.81**	**9.4**

Annual financial statements

Auditors' Report 2025

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Gredig + Partner AG
Treuhand Steuern Revision

Bericht der Revisionsstelle zur eingeschränkten Revision

an den Vorstand des

Vereins Soja Netzwerk Schweiz, Basel

Als Revisionsstelle haben wir die Jahresrechnung (Bilanz, Erfolgsrechnung und Anhang) des Vereins Soja Netzwerk Schweiz für das am 31. Dezember 2025 abgeschlossene Geschäftsjahr geprüft.

Für die Jahresrechnung ist der Vorstand verantwortlich, während unsere Aufgabe darin besteht, die Jahresrechnung zu prüfen. Wir bestätigen, dass wir die gesetzlichen Anforderungen hinsichtlich Zulassung und Unabhängigkeit erfüllen.

Unsere Revision erfolgte nach dem Schweizer Standard zur Eingeschränkten Revision. Danach ist diese Revision so zu planen und durchzuführen, dass wesentliche Fehlaussagen in der Jahresrechnung erkannt werden. Eine eingeschränkte Revision umfasst hauptsächlich Befragungen und analytische Prüfungshandlungen sowie den Umständen angemessene Detailprüfungen der beim geprüften Unternehmen vorhandenen Unterlagen. Dagegen sind Prüfungen der betrieblichen Abläufe und des internen Kontrollsystems sowie Befragungen und weitere Prüfungshandlungen zur Aufdeckung deliktischer Handlungen oder anderer Gesetzesverstösse nicht Bestandteil dieser Revision.

Bei unserer Revision sind wir nicht auf Sachverhalte gestossen, aus denen wir schliessen müssten, dass die Jahresrechnung nicht dem schweizerischen Gesetz und den Statuten entspricht.

Chur, 4. März 2026

Gredig + Partner AG

Curdin Mayer
Revisionsexperte
Leitender Revisor

ppa. Nicole Cavigelli

Association

Members and Executive Board

33 organisations are members of the Swiss Soya Network as at 31 December 2025:

Members of the Swiss Soya Network

As of 31 December 2025, the association's board consists of the following members: **Fortunat Schmid (President),** fenaco Cooperative**;**
Michel Darbellay, Swiss Farmers' Union (SBV)
Andrin Dietziker, Coop Cooperative
Thomas Kopp, Swiss Grain and Feed Trade Association (VSGF) **Martin Lobsiger,** Migros Cooperative Federation, acting from October Naomi Rosenthal
Christian Oesch, Association of Swiss Feed Manufacturers (VSF), acting from November Beat Röösli

In 2025, five board meetings, five meetings of the Procurement & Standards Working Group and four meetings of the Sustainability Working Group took place.

Legal notice and Contact

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