Dear customer,

As the new season gets underway our inspectors and agronomists are working across Black Sea region to assess potential yields and assure quality, in the fields.

Forecasts for Russia’s harvest vary and, as ever, the weather has impacted expectations for the season. Favorable winter weather, especially in the south is good news for the expected production, though some losses have been reported in the Volga region. Unfortunately, sudden extremely hot weather conditions in the last stages of wheat ripening negatively affected yield in the southern regions. Nevertheless, we are expecting the second highest record crop, after 2017’s exceptional outcomes.

Our 2019/20 season forecast is for gross yields of 78 million metric tons (MMT) for wheat, 19 MMT for barley and 13 MMT for corn. However, it is a little early in the growth cycle to be forecasting corn – that figure will become clearer in the coming weeks.

Of these harvests, we foresee potential exports of 36-37 MMT for wheat, 4-5 MMT for barley and 3-4 MMT for corn.

In Ukraine, the total grain harvest is expected be in the region of 70 MMT and exports are expected to remain steady at 46 MMT.

Favorable weather offered good conditions in early 2019 for winter crops and the new planting season. While yield forecasts remain steady overall, compared to last year, corn yields are expected to reduce – to 34 MMT, with increases in wheat (26 MMT) and barley (8 MMT) making up any shortfall. As a result, corn exports are expected to go down, while wheat and barley exports will rise.

ENSURE QUALITY AND VALUE WITH SMART WAREHOUSE

The harvest is in, grain is collected and stored – but how can you ensure its long-term value and quality? We are developing a new service to help combat these issues: Smart Warehouse. Harnessing the power of the ‘internet of things’ Smart Warehouse uses strategically located devices in a warehouse to control the condition of products stored within, in real-time. It detects fluctuations in temperature and moisture both inside the warehouse and at different levels in the stockpile helping you to manage the environmental conditions in your warehouse and act quickly in the event of a problem.

Our experts monitor Smart Warehouse installations remotely and in real-time to quickly and accurately detect any affected areas and act accordingly to eliminate the problem and minimize risk. Ask us for more details.

FIRST CLASS SERVICES

To ensure the continued delivery of market-leading services, our teams in the region have developed services and invested in new personnel, equipment and facilities. Read on to learn more about SGS operations across the region, about your local contacts and our new services and infrastructure.

ALEXEY BESCHETNOV
Regional Business Manager, Eastern Europe
Agriculture, Food and Life
RUSSIA

Following a year of consolidation, our Russian team continues to grow, expanding its expertise and capabilities to deliver class-leading services to our clients during the 2019/20 season.

ON THE ROAD
To meet the growing demand for on-the-spot testing services, we have again invested in mobile capabilities, allowing us to deliver quick and efficient test results to our clients. Today, we have more than 20 SGS mobile laboratories working all over Russia, including Siberia. In the last season we inspected and tested more than 10 million metric ton (MMT) this way – a figure we expect to grow in the upcoming season.

On-the-spot testing meets client requirements for efficient grain quality verification services enabling them to make faster business decisions.

IN THE LABORATORY
With 15 laboratories across Russia, we have introduced a variety of new capabilities and capacities to meet customer demands. Across the network, we have invested in developing and improving our pesticide and dioxins testing services. These build on our existing capabilities, including tests for:

- Mycotoxins
- Radioactivity
- Genetically modified organisms (GMO)
- Heavy metals

Our primary testing laboratory in Rostov-on-Don is accredited by GAFTA, FOSFA and ISO 17025 and meets international laboratory requirements. We are also pleased to announce that we will complete the GMP+ B11 audit process in late 2019.

INSPECTION
We are accredited to ISO/IEC 17020, ensuring the delivery of high-level inspection services that support client objectives and requirements.

Since last season, we have also implemented SGS’s Standard Inspection Reporting (SIR) system in offices across the Southern regions of Russia to improve our reporting to clients. SIR ensures the delivery of high-quality standardized reports in a secure cloud-based system.

TRANSSHIPMENT INSPECTIONS
The increasing demand for Russian grain exports is not being matched by developments in facilities and infrastructure at ports. Reloading rates at deep-sea port terminals is therefore limited for midsize and smaller grain exporters.

Transshipment by road and river ocean-going vessels at deep-sea ports, such as Kavkaz or OPL (neutral waters of the Kerch Strait), represents a good alternative. Currently, there are 13 storage-vessels and 15 floating cranes at Kavkaz and five storage-vessels and 3 floating cranes at OPL. The weight of the loaded commodity in the course of transshipment is defined by means of Draft Survey method only.

SGS has about 20 years of experience performing transshipment inspections. During this time transshipment volumes have increased significantly – from 0.3mio mts in 2001/02 to 11mio mts in 2018/19.

Our well-coordinated, professional inspection teams enjoy an excellent reputation. In 2018, more than nine MMT of grain were transshipped under SGS control. With complete control over the supply chain, SGS in Russian provides peace-of-mind to clients. Ensuring safety and weight and quality control: during the loading of river vessels at grain terminals, checks during road transportation, and control over reloading into the storage-vessels. This is completed by an inspection of the sea-going vessel and the issuance of a set of certificates to close the deal between seller and buyer.

CUSTOMER SEMINARS
Held in June, in preparation for the new season, we held three customer training events covering:

- Technical Analyses
- International Test Methods
- Pulses & Cereals

Hosted by our in-house experts these events attracted more than 30 participants, helping to share our expertise and support clients develop their activities.

STAFF TRAINING
In the buildup to this season, our field staff and inspectors have attended refresher courses. In the laboratory our scientists and technicians have undergone practical training on new services and new equipment. At the same time, our administrative staff have attended interactive workshops on our services and processes. All training has been developed to help us make the most of our in-house expertise, using experience, knowledge and customer feedback to grow and improve our skillsets.

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In Ukraine, our local teams have put in place new accreditations, equipment and services in time for the 2019/20 season.

**GMP+ B11 CERTIFICATION**
With effect from July 1, 2019, all GMP+ contract testing and analysis for Aflatoxin B1, pesticides, heavy metals and dioxins, must be performed by certified laboratories. In April, our laboratory received accreditation against the GMP+ B11 standard, ensuring that we can effectively support clients in the feed sector.

**FUMIGATION SERVICES**
We are currently undergoing assessment against Gafta’s new Standard for Fumigation and fully expect to be appointed a Gafta Approved Fumigator in the near future. This means we will be able provide the full range of fumigation services for goods traded on Gafta terms.

As an approved fumigation operator, we can offer both passive and active fumigation, fumisleeve removal at destination ports, fumigation residue management and gas concentration monitoring in cargoes.

**PESTICIDE RESIDUE SCREENING**
Already a market leader, we continue our program of investment in modern and innovative technical equipment to ensure our laboratory services remain competitive. In readiness for the new season, we have purchased new gas and liquid chromatographs from Waters – the world’s leading specialty measurement company. This investment has enabled us to increase our pesticide list and reduce the limits of quantification to meet destination and market-specific demands.

**CLIENT EVENT**
In July we held our annual client event. Ever-popular, the event attracted delegates from all our key clients and was attended by more than 30 people. During the two-day event, we explored:

- Predictions and outlook for the 2019/20 season grain and oilseed production
- New DSTU standard for wheat
- Quality requirements for different destination markets

**TRAINING**
In preparation for the new season, our inspection staff have undergone refresher training. Organized in-house, this training ensures that everyone is conversant with the most up to date Gafta and FOSFA sampling rules and sanitary requirements for the sampling of grains for microbiology testing. During the training, special attention was paid to visual quality control of grain shipments during loading/discharging, as well as laboratory-based exercises.

In addition, putting health and safety at the forefront of our operation, we have trained port staff in the use of special gas analyzers purchased following the arrival in port terminals of cargoes with unacceptable levels of fumigant residues.

After a busy year of updates and investment our team in Ukraine is ready and waiting to support you through the new season.
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