Dear Customer,

We are on the threshold of the Black Sea region’s new crop. Analysts of the grain market have made preliminary forecasts for major crops production in the region, as does SGS. Year on year forecasting becomes more difficult, and with good reason.

Generally, the economic situation took a turn for the worse. Devaluation and the continuing instability of national currencies have led to the growth of production costs in the plant growing sector (including increases in plant protection and fertilizer prices). We also saw the continuous reduction of investment and withdrawal of private capital from the agricultural sector against the backdrop of increasing government support. The current sowing campaign demonstrates structural changes in the main crops areas.

Climate risks are still crucial for agricultural production in the Black Sea region. Changeable weather conditions had a lot of influence on winter crops due to the warm winter and general temperature increase of almost two degrees. However, in May difficult weather conditions, including hail in the Stavropol and Krasnodor regions led to heavy damage and even elimination of the crop in some places. According to weather monitoring data drought risks present the main long-term trend affecting crop quantity and quality in the

(Continued on page 2...)
region, and spring crops are the most vulnerable ones. In early May 2016 the volume of precipitation and the resulting soil moisture remained favourable. Thus, general climate conditions for plant growth can be assessed as positive. The warm and wet spring boosted the spring sowing programme helping to ensure a good harvest. At the same time, we are facing a complex phytopathological situation with grain crops in the Central and Southern regions of Russia. Due to specific conditions at the end of May (high humidity, high air temperature) grain crops diseases, such as pyrenophora, septoria blotch, powdery mildew and others have been recorded. Weather conditions at the stages of flowering and ripening of winter crops are favourable for fusarium affection. According to our field survey, not all farms have treated winter crops against diseases and pests. With diseases spreading out, if the current weather conditions continue for at least 7-10 days yield will be affected. As a consequence, in case of untimely and ineffective treatments, the previous forecast of the Russian Ministry of Agriculture (106 MMT) is questionable.

Despite some adverse weather factors and other risks affecting major crops, we expect a fairly high gross grain yield in Russia and a slight decline in Ukraine.

In Ukraine, as per our preliminary estimates, gross grain yield is expected at about 55–58 MMT. At the same time, the structural change in grain production, has caused a significant decrease in the wheat share due to a decrease in the sowing area for this crop (14% down). As a result, we expect a slight decline in the total export potential of Ukraine down to 31-32 MMT in the 2016-2017 export season.

As for Russia, gross grain yield may exceed last year’s result, and our preliminary estimate lay within 103-104 MMT, but after our pre-harvest tour that figure has been revised to 107 MMT. Production of wheat, the main export crop, is expected to be 64-65 MMT. We also expect an increase in corn production. As a result, export potential may reach 36–38 MMT. The amount of wheat placed in the Russian intervention fund is another important factor. According to official statistics it exceeds 3 MMT, therefore the Government will have no need to buy wheat in the season to come.

Despite its geographical position in the center of Asia, Kazakhstan is also traditionally part of the Black Sea region. For the time being it is hard to make any reasonable forecasts for new crop. However, weather conditions are rather favourable and gross grain yield is not expected to be lower than that of last year (18 MMT). The final result will depend on weather conditions during the plants’ vegetation period and during harvesting.

The influence of weather conditions in June and July may cause some adjustments to the preliminary forecast for the general grain harvest in Russia and to the estimates concerning the quality of the new crop. As usual, SGS will determine the exact quality during our “Grain Quality Map - 2016” project which starts on 11 July 2016 in Russia and Ukraine, and later in Kazakhstan.

To better meet your needs, our teams have been developing services and investing in new personnel, equipment and facilities. Read on to find out more about SGS operations across the region and your local contacts, as well as our new services and infrastructure.

ALEXEY BESCHETNOV
Regional Business Development Manager / Eastern Europe Agriculture and Food
MICROBIOLOGICAL GRAIN AND FOOD TESTING EXPANDED

The molecular genetics and microbiological laboratory of SGS Ukraine is a specialised analytical facility, equipped according to international quality standards and guided by ISO 17025. Since December 2014, the laboratory has been offering a wide range of services aimed at conformity verification of grain cargoes and agricultural raw materials, with regard to microbiological and phytosanitary norms.

This service is extremely important, as it allows assessing whether goods satisfy the stringent European regulations including Council Directive 2000/29/EC, Commission Directive 2014/78/EU and Commission Directive 2014/83/EU. Our laboratory has the ability to assess the degree of contamination in grain batches caused by fungal, bacterial and viral diseases of crops. We can identify common bacterial infections of the cargo, for example, Salmonella spp., E.coli and other bacteria that can affect human health.

Since December 2015, the scope of our laboratory has been extended to food products. This enables us to test food against various requirements. For example, in accordance with Regulation (EC) No 2073/2005, food is to be tested against salmonellosis pathogens, a wide range of intestinal infections and listeriosis. Nowadays, we carry out those tests in-house.

Another focal point for our laboratory is to determine in vitro, the effectiveness of chemical and biological plant protection products against certain pathogens. This project is especially interesting as our capabilities allow us to perform these assignments in parallel with similar testing in vivo. As a result, we collect a significant volume of statistical data and optimise field trial schemes. This enables us to better describe the fungicides and their impact on local strains of diseases.

As part of our work, we also perform artificial bacterial and fungal inoculation under field conditions, allowing us to objectively evaluate the effectiveness of chemical protection products against specifically studied species under any weather conditions.

We are continuously investing in the expansion and upgrading of our microbiological testing facility, which is actively involved in implementation of various projects relating to practically every segment of the agricultural market.

EDUARD ERSHOV
Business Manager / Ukraine
REGISTRATION TRIALS LAUNCHED FOR PLANT PROTECTION

SGS Ukraine started to develop field trials for treatment products back in 2010. From the very beginning, when first trials were conducted, the need for accreditation became clear in order to conduct state registration trials.

The pesticide trial market in Ukraine was driven by state-owned institutions accredited to conduct registration trials. As a result, manufacturers of plant protection products had to use their services not only for registration but also for preliminary testing.

We have come a long way from performing the first trials to the establishment of an R&D centre, focusing on agriculture and agrotechnology, which was accredited by the Ministry for Environment and Natural Resources of Ukraine, at the end of 2015. This centre integrated the Agrotechnology Division and the Testing Facility of SGS Ukraine enabling us to get accreditation not only for biological evaluation of pesticides and agrochemicals on crops, but also for assessing the environmental impact of plant protection products and agricultural chemicals on non-target water, soil and surface ecosystems.

Our highly qualified staff and modern equipment along with the new accreditation allow us to better satisfy our clients’ needs, and we are enthusiastic about our on-going projects.

YULIA OVCAROVA
Assistant Business Manager / Ukraine

<table>
<thead>
<tr>
<th>VESSELS TEAM</th>
<th>Operations &amp; Efficiency Manager Head of Grain Operations and Containers</th>
<th><a href="mailto:Andrey.Berkatyuk@sgs.com">Andrey.Berkatyuk@sgs.com</a></th>
</tr>
</thead>
<tbody>
<tr>
<td>Andrey Berkatyuk</td>
<td>Operations &amp; Efficiency Manager Head of Grain Operations and Containers</td>
<td><a href="mailto:Andrey.Berkatyuk@sgs.com">Andrey.Berkatyuk@sgs.com</a></td>
</tr>
<tr>
<td>Valeria Boltinova</td>
<td>Senior Commercial Administrator</td>
<td><a href="mailto:Valeria.Boltinova@sgs.com">Valeria.Boltinova@sgs.com</a></td>
</tr>
<tr>
<td>Oksana Lyudukhovskaya</td>
<td>Commercial Administrator</td>
<td><a href="mailto:Oksana.Lyudukhovskaya@sgs.com">Oksana.Lyudukhovskaya@sgs.com</a></td>
</tr>
<tr>
<td>Anastasia Zavada</td>
<td>Senior Commercial Administrator</td>
<td><a href="mailto:Anastasia.Zavada@sgs.com">Anastasia.Zavada@sgs.com</a></td>
</tr>
<tr>
<td>Anna Dyadkina</td>
<td>Commercial Administrator</td>
<td><a href="mailto:Anna.Dyadkina@sgs.com">Anna.Dyadkina@sgs.com</a></td>
</tr>
<tr>
<td>Maria Ergieva</td>
<td>Commercial Administrator</td>
<td><a href="mailto:Maria.Ergieva@sgs.com">Maria.Ergieva@sgs.com</a></td>
</tr>
<tr>
<td>Larisa Marar</td>
<td>Commercial Administrator</td>
<td><a href="mailto:Larisa.Marar@sgs.com">Larisa.Marar@sgs.com</a></td>
</tr>
<tr>
<td>Kseniia Khodus</td>
<td>Commercial Administrator</td>
<td><a href="mailto:Kseniia.Khodus@sgs.com">Kseniia.Khodus@sgs.com</a></td>
</tr>
<tr>
<td>Yulia Ovcharova</td>
<td>Assistant Business Manager</td>
<td><a href="mailto:Yulia.Ovcharova@sgs.com">Yulia.Ovcharova@sgs.com</a></td>
</tr>
<tr>
<td>Oleg Onischenko</td>
<td>Deputy Business Manager for Technical Governance</td>
<td><a href="mailto:Oleg.Onischenko@sgs.com">Oleg.Onischenko@sgs.com</a></td>
</tr>
</tbody>
</table>
### OIL CONTAINERS & FOOD TEAM

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
<th>Email</th>
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<tbody>
<tr>
<td>Ivanna Saburova</td>
<td>Senior Commercial Administrator</td>
<td></td>
</tr>
<tr>
<td>Viktoria Zalipyatskaya</td>
<td>Commercial Administrator</td>
<td></td>
</tr>
<tr>
<td>Alyona Zaika</td>
<td>Commercial Administrator</td>
<td></td>
</tr>
<tr>
<td>Elona Chulkova</td>
<td>Deputy Head of Container and Vegoils Inspections</td>
<td><a href="mailto:Elona.Chulkova@sgs.com">Elona.Chulkova@sgs.com</a></td>
</tr>
<tr>
<td>Katerina Chizh</td>
<td>Commercial Administrator</td>
<td></td>
</tr>
<tr>
<td>Victoria Krotova</td>
<td>Commercial Administrator</td>
<td></td>
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<tr>
<td>Suzanna Gorbatiuk</td>
<td>Commercial Administrator</td>
<td></td>
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<tr>
<td>Yulia Levandovskaya</td>
<td>Commercial Administrator</td>
<td></td>
</tr>
<tr>
<td>Vera Golubovich</td>
<td>Commercial Administrator</td>
<td></td>
</tr>
<tr>
<td>Igor Stepanyuk</td>
<td>Head of Vegoil Subdivision</td>
<td><a href="mailto:Igor.Stepanyuk@sgs.com">Igor.Stepanyuk@sgs.com</a></td>
</tr>
<tr>
<td>Alexey Berchatov</td>
<td>Operations &amp; Efficiency Manager, Head of Food</td>
<td><a href="mailto:Alexey.Berchatov@sgs.com">Alexey.Berchatov@sgs.com</a></td>
</tr>
</tbody>
</table>

### INLAND TEAM

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
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</tr>
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<tbody>
<tr>
<td>Nina Dudnik</td>
<td>Commercial Administrator</td>
<td></td>
</tr>
<tr>
<td>Maxim Yagovenko</td>
<td>Senior Commercial Administrator</td>
<td></td>
</tr>
<tr>
<td>Stepan Koshelev</td>
<td>Seed and Crop Service Coordinator, Head of Field Trials and Crop Survey</td>
<td><a href="mailto:Stepan.Koshelev@sgs.com">Stepan.Koshelev@sgs.com</a></td>
</tr>
<tr>
<td>Valeria Yanevych</td>
<td>Commercial Administrator</td>
<td></td>
</tr>
<tr>
<td>Alexey Garidzhuk</td>
<td>Senior Inspector</td>
<td></td>
</tr>
<tr>
<td>Igor Dedukh</td>
<td>Agronomist</td>
<td></td>
</tr>
<tr>
<td>Nikolay Kalinin</td>
<td>Fumigation Coordinator</td>
<td><a href="mailto:Nikolay.Kalinin@sgs.com">Nikolay.Kalinin@sgs.com</a></td>
</tr>
<tr>
<td>Vasyl Petrenko</td>
<td>Head of Inland Inspections</td>
<td><a href="mailto:Vasyl.Petrenko@sgs.com">Vasyl.Petrenko@sgs.com</a></td>
</tr>
</tbody>
</table>
AZOV LABORATORY ACCREDITED BY GAFTA

SGS Azov Laboratory took part in the GAFTA procedure for testing of grains and feed stuff in order to obtain accreditation as per the GAFTA analysts scheme. For the 2016/2017 season they will become the fourth SGS laboratory along with SGS Rostov, SGS Novorossiysk, and SGS Yeisk to become accredited by GAFTA for the testing of grains and feed stuff.

TRANS-SHIPMENT 2016

This year the trans-shipment programme for grain export started in January 2016, in contrast to previous years, when it started in April/May. Mainly this is due to excessive grain reserves available in the market and good prospects for the 2016 crop.

In the beginning of the year, our teams from Novorossiysk and Kerch were involved as surveyors on the road and now they are ready to cover all export flows for weight and quality control during the seasonal peak (July – November 2016). Last year, SGS’ teams inspected over 3.1 MMT of grain on the road with 100% confirmation of weight on seagoing vessels against coastal ones.

NEW OPPORTUNITIES IN SEED & CROP SEGMENT

SGS’ agrochemical and seeds laboratory is being moved from Voronezh to Rostov, in order to cover our client’s needs in this segment in the new season.

In addition to existing field trials (trials with a variety of crops, pesticides and demo-trials), our team from Taganrog will expand our capability by adding a new service - field trials for fertilisers.

Recently, we have launched three large farm-plot trials focusing on study of the effects of several types of fertilisers on winter wheat, sunflower and corn.

AZOV TEAM

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dmitriy Shved</td>
<td>Inspector</td>
<td><a href="mailto:Dmitriy.Tsyban@sgs.com">Dmitriy.Tsyban@sgs.com</a></td>
</tr>
<tr>
<td>Igor Kolesnikov</td>
<td>Inspector</td>
<td></td>
</tr>
<tr>
<td>Valentin Kriva</td>
<td>Inspector</td>
<td></td>
</tr>
<tr>
<td>Dmitriy Tsyban</td>
<td>Location Manager</td>
<td></td>
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<tr>
<td>Irina Dyadyun</td>
<td>Laboratory Assistant</td>
<td></td>
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<tr>
<td>Natalia Kostyuchenko</td>
<td>Laboratory Assistant</td>
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<tr>
<td>Marina Alieva</td>
<td>Laboratory Assistant</td>
<td></td>
</tr>
<tr>
<td>Olga Korsun</td>
<td>Senior Laboratory Specialist</td>
<td></td>
</tr>
<tr>
<td>Elena Nazarenko</td>
<td>Assistant</td>
<td><a href="mailto:Elena.Nazarenko@sgs.com">Elena.Nazarenko@sgs.com</a></td>
</tr>
<tr>
<td>Tatyana Goryachaya</td>
<td>Assistant</td>
<td><a href="mailto:Tatyana.Goryachaya@sgs.com">Tatyana.Goryachaya@sgs.com</a></td>
</tr>
<tr>
<td>Anna Dubinskaya</td>
<td>Assistant</td>
<td><a href="mailto:Anna.Dubinskaya@sgs.com">Anna.Dubinskaya@sgs.com</a></td>
</tr>
<tr>
<td>Irina Sitnik</td>
<td>Administrator</td>
<td><a href="mailto:Irina.Sitnik@sgs.com">Irina.Sitnik@sgs.com</a></td>
</tr>
<tr>
<td>Ekaterina Kim</td>
<td>Senior Administrator</td>
<td><a href="mailto:Ekaterina.Kim@sgs.com">Ekaterina.Kim@sgs.com</a></td>
</tr>
</tbody>
</table>

SERGEY DERZHAVIN
Business Manager / Russia
SAFETY LABORATORY IN ROSTOV UPGRADED

In the past, quality parameters were the top priority, but nowadays safety also occupies an important place in the testing agenda. Parameters such as pesticides, heavy metals, mycotoxins, dioxins and GMO are to be thoroughly analysed.

Based on experience of the previous grain seasons, mycotoxins assessment has been the most in demand. The special focus on mycotoxins is due to their prevalence in the environment and to their ability to strike foodstuff at any stage of the supply chain. For example, in fields, during harvesting, transportation and storage, or during cooking of food at home.

Consequently, we took the decision to upgrade our testing facility in Rostov-on-Don, which is now capable of analysing mycotoxins, not only by means of immunological methods but also by GAFTA-approved chromatographic methods. The range of tests performed by our laboratory include:

- Total aflatoxin (B1, B2, G1, G2)
- Vomitoxin (DON)
- Ochratoxin A
- Fumazinin
- Zearalenone

(Continued on page 8...
During the grain season 2016/2017, the SGS Rostov-on-Don laboratory will be further upgraded for analysis of pesticides, dioxins and heavy metals, resulting in the establishment of a large laboratory complex providing extensive analysis of all types of export cargos in accordance with international standards. We are committed to providing our clients with the high quality and quick testing services they need for their trading activities.
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<tr>
<th>YEISK TEAM</th>
<th>Position</th>
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<tr>
<td>Denis Kataev</td>
<td>Inspector</td>
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<tr>
<td>Aleksey Abramchuk</td>
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<tr>
<td>Anton Vinogradov</td>
<td>Inspector</td>
<td></td>
</tr>
<tr>
<td>Evgeniy Nechepurenko</td>
<td>Operations Manager</td>
<td><a href="mailto:Evgeniy.Nechepurenko@sgs.com">Evgeniy.Nechepurenko@sgs.com</a></td>
</tr>
<tr>
<td>Irina Korovina</td>
<td>Inland Manager Russia</td>
<td><a href="mailto:Irina.Korovina@sgs.com">Irina.Korovina@sgs.com</a></td>
</tr>
<tr>
<td>Igor Larkov</td>
<td>Location Manager</td>
<td><a href="mailto:Igor.Larkov@sgs.com">Igor.Larkov@sgs.com</a></td>
</tr>
<tr>
<td>Tatiana Yakovenko</td>
<td>Administrator Assistant</td>
<td><a href="mailto:Tatiana.Yakovenko@sgs.com">Tatiana.Yakovenko@sgs.com</a></td>
</tr>
<tr>
<td>Sergey Yurov</td>
<td>Inspector</td>
<td></td>
</tr>
<tr>
<td>Aleksandr Gorbachev</td>
<td>Inspector</td>
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<tr>
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<tr>
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<td>Senior Inspector</td>
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<td>Nikita Ditsenko</td>
<td>Inspector</td>
<td></td>
</tr>
<tr>
<td>Elena Sorokina</td>
<td>Laboratory Assistant</td>
<td></td>
</tr>
<tr>
<td>Irina Bambetova</td>
<td>Chemical Laboratory</td>
<td></td>
</tr>
<tr>
<td>Ekaterina Kulichenko</td>
<td>Administrator Assistant</td>
<td><a href="mailto:Ekaterina.Kulichenko@sgs.com">Ekaterina.Kulichenko@sgs.com</a></td>
</tr>
<tr>
<td>Ludmila Gorlach</td>
<td>Laboratory Manager</td>
<td></td>
</tr>
<tr>
<td>Oksana Pekarskaya</td>
<td>Administrator Assistant</td>
<td><a href="mailto:Oksana.Pekarskaya@sgs.com">Oksana.Pekarskaya@sgs.com</a></td>
</tr>
<tr>
<td>Yulia Vishnyakova</td>
<td>Administrator Assistant</td>
<td><a href="mailto:Yulia.Vishnyakova@sgs.com">Yulia.Vishnyakova@sgs.com</a></td>
</tr>
<tr>
<td>Lilya Miroshnikova</td>
<td>Administrator Assistant</td>
<td><a href="mailto:Lilya.Miroshnikova@sgs.com">Lilya.Miroshnikova@sgs.com</a></td>
</tr>
<tr>
<td>Alina Vovk</td>
<td>Administrator Assistant</td>
<td><a href="mailto:Alina.Vovk@sgs.com">Alina.Vovk@sgs.com</a></td>
</tr>
</tbody>
</table>

MAY 2016
### TAGANROG TEAM

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mikhail Shumlin</td>
<td>Location Manager</td>
<td><a href="mailto:Mikhail.Shumlin@sgs.com">Mikhail.Shumlin@sgs.com</a></td>
</tr>
<tr>
<td>Elena Anpilogova</td>
<td>Administrator</td>
<td><a href="mailto:Elena.Anpilogova@sgs.com">Elena.Anpilogova@sgs.com</a></td>
</tr>
<tr>
<td>Nikolay Simeysky</td>
<td>Senior Inspector</td>
<td></td>
</tr>
<tr>
<td>Alexander Diskin</td>
<td>Agronomist</td>
<td><a href="mailto:Alexander.Diskin@sgs.com">Alexander.Diskin@sgs.com</a></td>
</tr>
<tr>
<td>Eduard Kikhtev</td>
<td>Inspector</td>
<td></td>
</tr>
<tr>
<td>Lyudmila Melnichenko</td>
<td>Laboratory Assistant</td>
<td></td>
</tr>
<tr>
<td>Viktoria Sidelnikova</td>
<td>Laboratory Assistant</td>
<td></td>
</tr>
<tr>
<td>Elena Demina</td>
<td>Laboratory Assistant</td>
<td></td>
</tr>
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### TUAPSE TEAM

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Konstantin Nazarov</td>
<td>Operations Manager</td>
<td><a href="mailto:Konstantin.Nazarov@sgs.com">Konstantin.Nazarov@sgs.com</a></td>
</tr>
<tr>
<td>Svetlana Pahomova</td>
<td>Laboratory Assistant</td>
<td></td>
</tr>
<tr>
<td>Anastasia Yakhnakova</td>
<td>Administrator</td>
<td><a href="mailto:Anastasia.Yakhnakova@sgs.com">Anastasia.Yakhnakova@sgs.com</a></td>
</tr>
<tr>
<td>Alla Bachinskaya</td>
<td>Administrator</td>
<td><a href="mailto:Alla.Bachinskaya@sgs.com">Alla.Bachinskaya@sgs.com</a></td>
</tr>
<tr>
<td>Amir Gadirov</td>
<td>Senior Inspector</td>
<td></td>
</tr>
</tbody>
</table>
**VOLGOGRAD TEAM**

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vacheslav Gorodilov</td>
<td>Coordinator</td>
<td><a href="mailto:Vacheslav.Gorodilov@sgs.com">Vacheslav.Gorodilov@sgs.com</a></td>
</tr>
<tr>
<td>Andrey Martynov</td>
<td>Coordinator</td>
<td><a href="mailto:Andrey.Martynov@sgs.com">Andrey.Martynov@sgs.com</a></td>
</tr>
<tr>
<td>Maxim Anikin</td>
<td>Operations Manager</td>
<td><a href="mailto:Maxim.Anikin@sgs.com">Maxim.Anikin@sgs.com</a></td>
</tr>
<tr>
<td>Valeria Slusarenko</td>
<td>Laboratory assistant</td>
<td></td>
</tr>
<tr>
<td>Maxim Dobriy</td>
<td>Location Manager</td>
<td><a href="mailto:Maxim.Dobriy@sgs.com">Maxim.Dobriy@sgs.com</a></td>
</tr>
<tr>
<td>Alla Lineva</td>
<td>Coordinator Assistant</td>
<td><a href="mailto:Alla.Lineva@sgs.com">Alla.Lineva@sgs.com</a></td>
</tr>
</tbody>
</table>

**SEVASTOPOL TEAM**

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Igor Dmitryuk</td>
<td>Location Manager</td>
<td><a href="mailto:Igor.Dmitryuk@sgs.com">Igor.Dmitryuk@sgs.com</a></td>
</tr>
<tr>
<td>Vladimir Schyotkin</td>
<td>Inspector</td>
<td></td>
</tr>
<tr>
<td>Igor Nedbay</td>
<td>Inspector</td>
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**KERCH TEAM**

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vladimir Cheverda</td>
<td>Operations Manager</td>
<td><a href="mailto:Vladimir.Cheverda@sgs.com">Vladimir.Cheverda@sgs.com</a></td>
</tr>
<tr>
<td>Artyom Kovylov</td>
<td>Senior Inspector</td>
<td></td>
</tr>
<tr>
<td>Valeriy Khomenko</td>
<td>Inspector</td>
<td></td>
</tr>
<tr>
<td>Sergey Zelyanin</td>
<td>Inspector</td>
<td></td>
</tr>
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