

FOCUS

LATAM

Trusted.
Independent.
Committed.

2025 Edition

SGS

Agricultural Capabilities in Latin America

"The SGS team is a beacon of technical excellence and professionalism. Their 24/7 testing and inspection support means that we always have a trusted partner available to guide our operations help us adapt to our clients' requirements and understand and implement the latest industry best practices."

Deepak Tulsian, Trading Manager, Midstar

For more than 85 years, we have been a cornerstone of inspection, testing and certification for agricultural commodities across **Brazil, Argentina, Paraguay and Uruguay (APU)**, a region that remains one of the most influential hubs in global food and feed supply. Each of these countries contributes significantly to international agricultural commodities markets, with production systems and export corridors that shape trade flows across Asia, Europe, Africa and the Middle East. Their agri sectors are vital to their national economies and play an essential role in feeding a growing global population.

Our long-standing presence, extensive network and commitment to technical excellence enable us to support customers throughout this dynamic region with the accuracy, consistency and assurance required in today's evolving regulatory and commercial landscape.

In this edition of our Focus On series, we provide a comprehensive overview of how we support the agricultural commodities supply chain. Inside, we discuss:

- **Market dynamics:** export trends, destination markets and regional performance
- **Our capabilities:** inspection, testing, certification and digital trade solutions
- **Our regional footprint:** facilities, team expertise, new capabilities and planned expansions
- **Compliance and export readiness:** navigating global regulations and responsible sourcing requirements

Together, these insights illustrate our continued commitment to strengthening the integrity, reliability and competitiveness of the industry across the region.

Read on to learn more.



Market dynamics

Agricultural commodities supply chains spanning **Brazil, Argentina, Paraguay and Uruguay** form one of the most significant export hubs. From the Paraná–Paraguay Waterway to Brazil’s deep-water port network, this region moves volumes that shape trade year after year.

With more than 500 full-time specialists working across offices, laboratories and field operations, we support these flows through a strong presence in key production and logistic corridors:

Brazil

- Aratu
- Barcarena
- Barueri
- Imbituba
- Itacoatiara
- Maceió
- Paranaguá
- Recife
- Rio Grande
- Santana
- Santarém
- Santos
- São Francisco do Sul
- São Luís
- Vitória

Uruguay

- Montevideo
- Nueva Palmira

Paraguay

- Asunción
- Villeta

Argentina

- Bahía Blanca
- Buenos Aires
- Necochea
- Rosario

Key destinations include:

- **Asia:** China, India, Vietnam, Indonesia, the Philippines, Thailand, Pakistan
- **Europe:** Spain, the Netherlands, the United Kingdom, Germany, Italy
- **Africa:** Nigeria, Cameroon, Algeria, Egypt, Morocco, South Africa
- **Middle East:** Saudi Arabia, the United Arab Emirates
- **Latin America:** Chile, Peru

The diversity of both its exported commodities and market presence highlights the region’s strategic importance as a consistent supplier of food, feed and processed products to global demand centers.

Market trends and demand growth

Demand growth remains strongest in Asia, particularly China, India and Southeast Asia, followed by North Africa and the Middle East.

The APU countries collectively export between 130 - 150 million metric tons (MMT) of grains, oilseeds, oils, flours and by-products annually, a 10 - 15% increase over the previous year due to improved weather conditions and stronger yields. Argentina accounts for most of this output, with Paraguay and Uruguay also maintaining important roles in river-port logistics.

Brazil’s export performance followed a similar upward trajectory, rising from 151 MMT in 2021 to 174 MMT in 2022 and 214 MMT in 2023, before stabilizing at around 200 MMT in 2024. This demonstrates Brazil’s capacity to sustain high-volume, multi-commodity export programs supported by robust port infrastructure and a strong production base.

Our teams oversee inspection, testing and certification at every step, ensuring that shipments meet the quality, compliance and traceability expectations of international buyers.

Export profile and key commodities

The region exports a broad portfolio of agricultural commodities, ranging from the soybean complex, including beans, meal and oil, to corn, wheat, barley, sugar, rice, canola, peanuts and various vegetable oils and processed derivatives.



How we support the region

We support the agricultural commodities sector with a comprehensive suite of testing, inspection, certification and fumigation services that deliver confidence and precision from origin to export. While each country contributes unique strengths, our integrated regional network ensures consistent quality standards and deep technical expertise.

Advanced laboratory testing

Our laboratories form the analytical backbone of our regional operations, collectively performing more than 100,000 analyses per year, most of them in Brazil.

Across the region, our network supports a **full scope of testing**, from physical and chemical analysis to microbiology, heavy metals, GMO assessment and comprehensive screening for pesticide residues and mycotoxins.

Within the APU countries, our laboratories specialize in high-complexity multi-residue analysis using advanced GC-MS/MS and LC-MS/MS platforms, enabling the detection of more than 600 compounds in a single run. They also conduct advanced molecular testing, including PCR-based GMO determination and genetic origin verification. All APU facilities operate under ISO/IEC 17025 accreditation, use SGS DigiComply, our market-intelligence tool that supports regulatory interpretation and compliance monitoring, and are fully integrated with online reporting systems for fast and reliable data access.

Brazil's laboratory network complements these strengths with extensive MAPA-regulated capabilities, covering GMO and residue analysis alongside microbiology, heavy metals and physical-chemical testing. Its scale and nationwide coverage enable rapid turnaround times and strong support across the country's major agricultural corridors.

Inspection, certification and cargo assurance

Inspection services are central to our support for trade. We provide weight and quality control at ports and terminals, supervise cargo loading and unloading on vessels, barges and trucks, and carry out independent verification of sampling and testing according to Gafta (Grain and Feed Trade Association), FOSFA (Federation of Oils, Seeds and Fats Associations), ISO and AOCS (American Oil Chemists' Society) standards.

We certify the cleanliness and suitability of holds, tanks and containers, verify quality and commercial specifications for grains, oilseeds and by-products, and perform warehouse and silo inspections that include pest, moisture and inventory control. We also support good agricultural practice assessments and fertilizer and agrochemical verifications.

Fumigation and phytosanitary Services

Fumigation is essential to maintaining export quality and is often a phytosanitary requirement for international trade. In the APU region, we conduct **fumigation** of bulk cargoes, containers, silos, warehouses, barges and vessels, including in-transit treatments. These services comply with local authorities such as SENASA (Argentina's National Service for Agri-Food Health and Quality), SENAVE (National Service for Plant and Seed Quality in Paraguay) and MGAP (Uruguay's Ministry of Livestock, Agriculture and Fisheries). We use approved fumigants such as phosphine and ISPM-15 treatments for wooden packaging used in international shipments.



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We are fully committed to serving our customers with dedication and professionalism, ensuring quality service and building relationships based on trust."

Cristiane Padula, Commercial Manager,

Accreditations and international compliance

Our accreditations reflect our commitment to global best practices and ensure that results are accepted in the world's most demanding markets. We are approved Analysts and Superintendent members of both Gafta and FOSFA for grains, oilseeds and oil and fats, and additional hold ISO/IEC 17025 and ISO/IEC 17020 certifications for laboratory competence and inspection activities.

Alongside our own accreditations, we support customers seeking sustainability compliance through certifications such as ISCC (International Sustainability and Carbon Certification), 2BSvs (Biomass Biofuels Sustainability voluntary scheme) and RTRS (Round Table on Responsible Soy). Additional certifications such as GMP+ and FAMI-QS (Feed Additives and Premixtures Quality System) reinforce our capabilities in the feed sector, while MAPA and SAL/RSA approvals further strengthen operations in Brazil.

Digital trade transformation

In Brazil, our operations are integrated with Covantis, the digital platform used by major global traders to manage surveyor appointments, documentation and inspection data. Through this, our reports and certificates flow directly into a shared digital environment, reducing manual exchanges, minimizing

errors and enhancing the reliability of information across high-volume grain and oilseed exports. This model will be extended to additional countries, reinforcing our commitment to consistent, data-driven assurance across the agricultural commodities market.

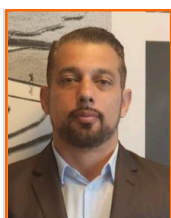
Investments and expansions

Across the region, we have made targeted investments. Recent enhancements include modernization of the Rosario, Argentina, laboratory, expansion of the Nueva Palmira, Uruguay, laboratory and the opening of the Villeta, Paraguay, operational office. In Brazil, we strengthened northern corridor operations through our Santarém facility. Technical upgrades include new multi-residue methods, digital traceability, expanded sustainability certification coverage, wheat analysis in Rio Grande, sugar testing in Maceió.

Looking ahead, we plan to further expand our presence with a satellite in Paysandú on Uruguay's northern coast to support faster analysis of grains, flours and fertilizers. An additional operational office in northern Paraguay is also under evaluation, expanding coverage along the Waterway. New services such as veterinary residue and carbon footprint testing in Rosario will soon be introduced, alongside expanded environmental monitoring in Asunción.



Compliance and export readiness



"As the head of port and terminals operations, acting with purpose and excellence to ensure that each agricultural service certified by the company reaches the customer with quality, safety, credibility and trust."

Luis Fernando, Operational Manager, SGS

Supply chains across the region operate under increasing operational and regulatory scrutiny. Climate variability continues to affect yields and production planning, while shifts in global input prices and inland logistics constraints add further complexity to export operations.

Policy frameworks are also evolving rapidly. In the APU countries, ongoing economic and regulatory changes require exporters to demonstrate stronger controls over quality, traceability and cargo integrity. Brazil, in particular, faces tighter expectations around contamination thresholds and cargo purity. International markets are reinforcing their own requirements. In the European Union, the forthcoming zero-deforestation regulation (EUDR) is expected to require verified origin and compliance with defined land-use criteria for grains, oilseeds and related by-products once fully implemented.

Buyers in Asia and North America continue to apply strict food and feed safety standards through systems such as ISO 22000, HACCP and FAMI-QS, complemented by sustainability schemes including ISCC, 2BSvs and RTRS. In parallel, national frameworks in Brazil are expanding, particularly in areas such as environmental licensing, land-use monitoring and contamination control.

At SGS, we help customers navigate these requirements through accredited testing, internationally recognized certification services and secure digital documentation. Our integration with the digital platforms further strengthens data accuracy and traceability, enabling exporters to meet compliance expectations and maintain access to high-value global markets.



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Our commitment to the region

As Brazil, Argentina, Paraguay and Uruguay continue to anchor global agricultural commodities trade, the need for dependable verification, accredited testing and consistent quality assurance remains essential. With more than eight decades of experience and a fully integrated network of laboratories, inspection teams and digital capabilities, we remain committed to supporting our customers with clarity, confidence and technical excellence, no matter how complex the market becomes.

Whatever the commodity, wherever the location, our trusted professionals will be with you every step of the way.



500+

regional agricultural
specialists

100K

analyses performed
annually

25+

markets supported
with exports

85+

years of
excellence

Trusted. Independent. Committed.



Contact us

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When you need to be sure