

# FOCUS DANUBE

Trusted.  
Independent.  
Committed.

2023 Edition

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SGS

# Introduction

The Danube River is of utmost importance to the European economy. Due to its strategically significant location, stretching across central and southeastern Europe, the Danube presents itself as a necessity for the agricultural trade industry.

As we firmly enter the second half of 2023, despite the challenging weather patterns, the latest yield analyses reveal a solid year with growth across all main agriculture markets.

Working throughout, we have more than 950 experts operating within laboratories, ports, offices, and in the field across Bulgaria, Hungary, Romania, Serbia, and Ukraine. Across the region, we continue to invest strongly to ensure the sustainable production and exportation of high-quality commodities, including barley, corn, soybeans, sunflower seeds, rapeseed, and wheat.

With over 140+ years of adding value to society, our trusted teams can fulfill all your testing, inspection, risk management, fumigation, and market intelligence needs.



**Victoria Golubyatnikova**

Customer Care and International Sales Manager  
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## Our Commitment to Excellence

The global agricultural commodities supply chain presents opportunities and challenges. While you can easily access a huge range of markets and commodities, you also have to ensure that your goods meet the necessary quality and quantity parameters to fulfill your contractual obligations and meet both local and international standards and regulations.

With our vast network of offices and state-of-the-art laboratories, renowned for our independence, accuracy, and technical excellence we offer a unique, industry-leading depth and breadth of solutions you can trust.

Start your journey to excellence today. Contact us and take the first step towards creating an easier, more effective approach to agricultural trading.

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



# Regional Solutions

Our expertise in agricultural commodities is vast, thanks to our global and local networks. With an in-depth understanding of regional market dynamics, we can provide tailored solutions that meet your specific needs.

Our team within the Danube area has a proven track record of delivering high-quality services. We have a deep understanding of the regulatory environment and compliance requirements for the agricultural industry. We can ensure that your products always comply with the relevant regulations and contractual requirements.

We also keep a close eye on global market trends and emerging technologies, allowing us to offer innovative solutions that can help you improve your operational efficiency, reduce costs, and minimize risks.

With SGS, you can be assured of our end-to-end support and guidance from the field to the final destination. We are committed to delivering the highest level of customer service and building long-term partnerships with our clients based on trust, transparency, and mutual benefit.



TESTING



INSPECTION



FUMIGATION & PEST  
MANAGEMENT



RISK  
MANAGEMENT



AUDIT &  
CERTIFICATION



MARKET  
INTELLIGENCE



BARLEY



CORN



SOYBEANS



SUNFLOWER  
SEEDS



RAPESEED



WHEAT





## FOCUS ON BULGARIA



*"In the face of fluctuating commodity yields and changing weather patterns, we're committed to delivering reliable, accurate, and rapid testing for our clients. Our upgraded laboratory services and expanded accreditations really demonstrate that commitment."*

### **Anelia Andreeva**

Business Manager at SGS Bulgaria

### Spring brings new hope

Bulgaria's agricultural outlook has its challenges, but there are some exciting opportunities, too. The barley harvest has shown promising yields (averaging 5 t/ha) despite a heavy infestation of the barley yellow dwarf virus. Furthermore, unfavorable autumn conditions took their toll on the winter oilseed rape crop, affecting more than 40% of the country's fields.

But things are looking up: spring crops, particularly maize and sunflower, benefited from the frequent rains in May and June, and are now showing rapid development.

### New capabilities and accreditations deepen analysis

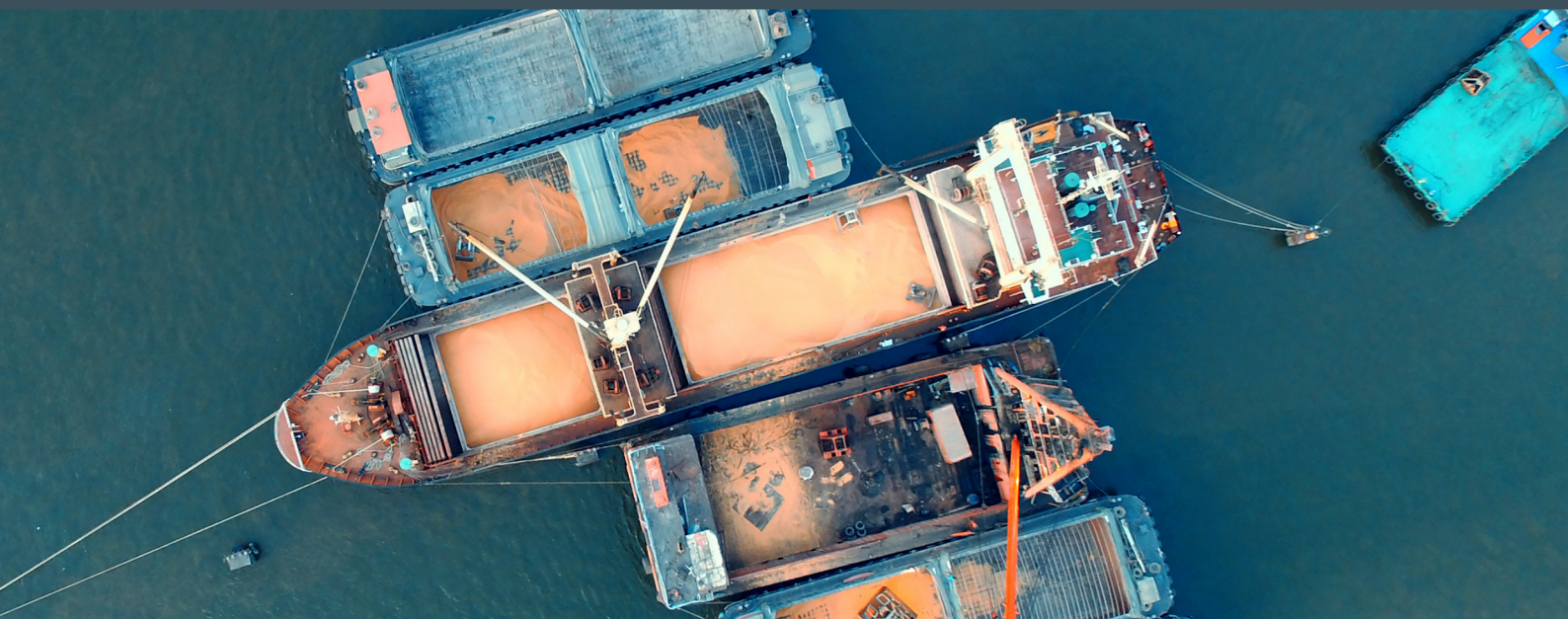
SGS Bulgaria continues to expand its capabilities and services to meet our client's diverse needs. For example, we've recently developed a calibration for the express unit for oleic/linoleic acid in sunflower seeds and crude sunflower oil. Our laboratory in Varna now offers increased accreditation scope for sugar testing and tissue and a flexible accreditation scope for GMOs and pesticides.

It can also perform new tests to detect grain and feed contamination with the African swine fever virus and the unauthorized addition of milled insects in food or feed.

A newly installed Laser Direct Infrared (LDIR) imaging system allows rapid screening of adulterants in food and feed. Furthermore, we've built a new section in the Varna laboratory for radiological analyses, which is now ready to offer tests for gamma radionuclides, strontium-90, total alpha, and total beta activity in grain, feed, food, and water.

### Pursuing the highest standards

Our commitment to continuous improvement extends to our employees. In 2023, we held an internal annual training session in Mogilovo covering communication skills, Gafta requirements, and health and safety training. This commitment to our team's professional development helps us ensure our services are of the highest standard, meeting and exceeding our clients' needs.



## FOCUS ON HUNGARY



*"Equipped with state-of-the-art technology and an expert team, we're delivering vital agri-commodity services to help our clients meet the industry's ever-evolving demands."*

### **Julia Csizmadia**

Business Manager at SGS Hungary

### **Market outlook**

The 2023/2024 season is looking promising for Hungarian agriculture, with robust projections for key commodities.

Across our barley and wheat crops, our initial analyses promise an impressive export, with the former quantity reaching 8 million metric tons (MMT), and the latter slated for 2.8 MMT. As for corn, crop production is anticipated to hit 6.3 MMT, a marked improvement on the previous season's yield of 4.8 MMT.

These positive trends are bolstered by favorable weather conditions in 2023, which are likely to ensure high quality across the commodities.

### **Developing our capabilities and workforce**

Here at SGS Hungary, we have been proactive in strengthening our capabilities to meet the industry's changing needs. We recently upgraded our laboratory in Nyíregyháza, and we have also extended our ISO 17025 accreditation scope, underlining our commitment to delivering high-quality services.

Furthermore, our team has been enhanced with the addition of a new lab manager. The entire team of 65 full-time employees has received comprehensive training, spanning safety practices, office processes, on-site practical training in sampling, and SIR training. We have also ensured our team stays on top of the latest regulatory changes to Gafta, FOSFA, and ISO.

### **Operational excellence & key achievements**

SGS Hungary is a Gafta Approved Superintendent and FOSFA certified for testing of oilseeds, oils, and fats. Since we began operating in 1991, we have consistently delivered a wide variety of analytical services, including toxins, GMO, pesticide (full screening), and Chlorpyrifos-methyl testing that meet high industry standards.

In the 2022-2023 season, we inspected 4.1 MMT of cargo, of which 201,000 MT were vessel inspections. Our accreditations and certifications encompass Gafta, ISO, FOSFA, and GMP+, reinforcing our commitment to quality and excellence in all our operations.



## FOCUS ON ROMANIA



*"We're now delivering better service for customers than ever before, thanks to a predicted increase in production, and new capabilities. Exciting times are ahead."*

**Claudiu Iancu**

Business Manager at SGS Romania

### Demands for rapid analysis

A surge in agricultural production is expected across Romania, with barley estimated at 2 million metric tons (MMT), wheat at 10.5 MMT, and rapeseed at 2 MMT. While it's too early to provide a reliable estimate for corn, the sunflower seed forecast is set at 3.3 MMT.

Although it's early days for definitive quality analysis, recent heavy rains in western and southwestern Romania have raised concerns about the quality and quantity of barley and wheat crops. Simultaneously, the south has experienced delayed corn plant biomass developments due to dry weather conditions.

Despite these weather challenges, SGS remains committed to ensuring the highest production standards for our clients, offering rapid and accurate testing to ensure that our client's customers get the best possible results.

### New insight into pesticides & GMO presence

SGS Romania has developed and implemented a range of solutions tailored to these specific issues. We're equipped to perform rapid tests in inland locations to detect GMO presence in rapeseeds,

having developed new detection methods to extend our pesticide list. For example, our upgraded Constanta laboratory can now detect chlormequat. What's more, we've also invested in equipment to improve heavy metals detection via ICP.

### Quality remains the star of the show

This season has seen several promotions within the SGS team, enhancing our ability to deliver outstanding service and improving regional coordination. Two newly hired chemists are being trained for analytical analyses, while a third quality coordinator is being promoted at Constanta Port.

We also recently closed an audit and achieved accreditation for heavy metal analyses using the ICP method, extending upon our existing accreditation for the use of atomic absorption. Additionally, we are in the process of extending our pesticide analyses range by an additional 200.

The team is working relentlessly to ensure SGS maintains the highest standards for our clients. We're ready and willing to offer a range of services, from mycotoxins analysis and GMO screening to 24/7 inspection services.



## FOCUS ON SERBIA



*"It's been a challenging year, but our continuous upskilling and commitment to staying one step ahead of industry requirements have allowed us to navigate it. And still deliver the highest quality of service to our clients."*

**Andrijana Radic**

Agri Commodities Manager at SGS Serbia

### Unpredictable times for commodities

This year's weather conditions have presented a mixed outlook for Serbia's primary agricultural commodities.

The planted area for wheat was estimated at 725 hectares with an expected production total of 3.6 million metric tons (MMT) in 2023, with around 2.5 MMT of wheat expected to be available for export.

However, there are concerns over the quality of the wheat. Almost daily rainfall in recent months, particularly during the flowering stage, has affected wheat quality, resulting in the appearance of fusariosis and wheat bugs. The good news is that not all wheat-growing areas have experienced these issues. The harvest, expected in the first week of July, will provide a clearer picture of the impact of these issues on the wheat quality.

For maize, the planted area is around 5% smaller than the previous year, estimated to be around 900 hectares. Despite this decrease, the new maize crop looks extremely promising. The area planted under sunflowers remains consistent with the previous year, estimated at 245 hectares.

In these difficult conditions, we have prioritized its social responsibilities, reaffirming our commitment to provide the best possible support for customers.

### Vital support in challenging market conditions

This year has been challenging for commodity traders. Constance, the main destination for Serbian commodities, has seen significantly reduced maize exports, wheat exports were 24% lower than the previous season, and soybean exports have dropped by 90% due to two consecutive disastrous years. In these trying times, SGS Serbia provides vital support. We leverage our expertise and knowledge to navigate these challenges, offering services to help manage risk and ensure the quality and quantity of commodities.

### A first-class team

Despite the past year's challenges, the SGS Serbia team has remained cohesive and resilient. Our inspection, laboratory, and back-office staff have participated in an ongoing series of training sessions. These have ensured the team is always up-to-date with the newest local and international regulations and able to meet new challenges in inspection and testing.



## FOCUS ON UKRAINE



*"Perseverance has been a recurring theme in 2023; despite undeniably challenging conditions, we have continued going above and ensure our customers receive outstanding service – whether that's through new testing capabilities, new training, or new certifications."*

**Georgiy Tykhonenko**  
Business Manager at SGS Ukraine

### High-quality, but lower yields expected

The potential 2023 crop for Ukraine is estimated at 67 million metric tons (MMT) of grains and oilseeds, which is 8.5% less than the 2022 harvest of 73.8 MMT.

Despite the fall in yields this year, the wheat crop is expected to be enough to both meet domestic and regional demand.

However, there is reason to expect that agrometeorological conditions will be optimal for the vegetation of main crops, thanks to sufficiently high soil humidity levels and the absence of high air temperature.

### New testing facilities put quality control in focus

Since mid-2022, SGS Ukraine has launched several on-site testing facilities in the ports of Pivdennyi and Reni. These facilities mainly focus on quality intake control and the express testing of various commodities at port terminals.

These facilities have been essential during a period where agricultural storage vessels are regularly delayed for longer periods, calling the quality and

safety of the crops into question.

An SGS deep vacuum sampler was the only solution available for the sampling and determination of the quality and conditions of goods that had been held at Mykolaiv port for an extended period.

### New certifications unlock new capabilities

Our laboratory, based in Odesa, is accredited in accordance with the ILAC/ISO 17025, Gafta, FOSFA, and GMP+ schemes.

We are also currently in the process of obtaining VLOG certification for our genetic laboratory.

SGS has been dedicated to ensuring our laboratory can support all of the latest requirements for feed and food safety. Today, the facility's capabilities include pesticides, herbicides, and mycotoxins screening; GM lines determination and quantification; microbiology and quarantine testing; and testing for contamination hazards.

We have also launched a series of educational and practice training sessions for our back office and in-field inspectors.



# Meet the Team



BULGARIA



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# Our operations in the Danube region







## Bulgaria

-  Barley, maize, rapeseed, sunflower seeds, wheat
-  Algeria, China, Cyprus, Israel, Italy, the Netherlands, Spain, Tunisia
-  30+ Years  110 Experts
-  19,000+ Tests  3.5 MMT

## Hungary

-  Barley, corn, rapeseed, sunflower seeds, wheat
-  Germany, Romania
-  30+ Years  65 Experts
-  37,000+ Tests  4.1 MMT


## Romania

-  Barley, corn, rapeseed, sunflower seeds, wheat
-  Egypt, India, Jordan, the Netherlands, Philippines, Saudi Arabia, Spain
-  90+ Years  200 Experts
-  41,000+ Tests  12.2 MMT







## Serbia

-  Maize, sunflower seeds, wheat
-  Bosnia-Herzegovina, Italy, Romania
-  20+ Years  200 Experts
-  63,000+ Tests  1.15 MMT

## Ukraine

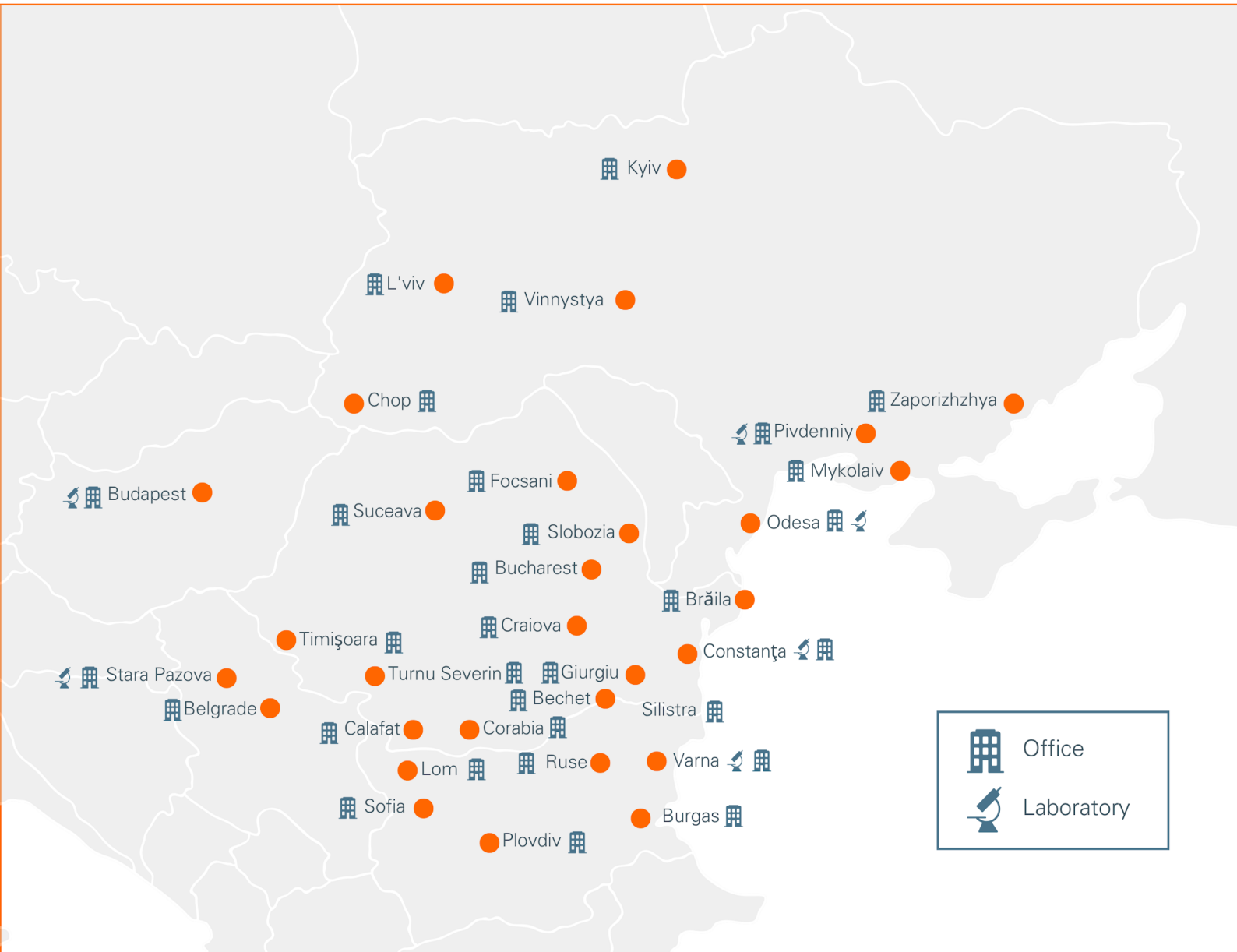
-  Barley, corn, rapeseed, sunflower seeds, soybeans, wheat
-  Egypt, India, Indonesia, the Netherlands, Spain, Tunisia, Turkey
-  30+ Years  380 Experts
-  119,000+ Tests  14 MMT

## Legend

-  Main commodities exported (22-23)
-  Main export destinations (22-23)
-  SGS years in business
-  Number of full time employees
-  Number of tests performed (22-23)
-  Volume inspected (22-23)

# Our unrivaled regional team

Our Danube team boasts world-class expertise, combining in-depth local knowledge with the latest worldwide industry best practices and technologies. Our highly experienced specialists across Bulgaria, Hungary, Romania, Serbia, and Ukraine ensure agricultural commodities in the region are inspected, tested, stored, and shipped in line with industry standards and your contractual requirements. With our extensive network of offices and state-of-the-art laboratories throughout the region, no area is left uncatered for.



**950+**  
Employees

**7**  
Laboratories

**36**  
Offices

**Gafta  
FOSFA**  
Members

# Trusted. Independent. Committed.

## Contact Us

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**SGS**