Gaftaworld
PROMOTING INTERNATIONAL TRADE
Issue 269 / September 2024

Committee on World Food Security, Rome – Gafta members welcome

Jaine Chisholm Caunt OBE and June Arnold will participate in the 52nd plenary session of the Committee on World Food Security (CFS 52) on 21-25 October in Rome. The agenda will focus on the 2024 edition of State of Food Security and Nutrition in the World (SOFI report), policy responses to the food crisis, initiatives against hunger and poverty, the monitoring of developments in relation to the right to adequate food and recommendations to reduce inequalities in food security and nutrition. The committee will also endorse the programme of work for 2024-2027 and discuss the strengthening of urban and peri-urban food systems in the context of rural transformation. If you would like to join the Gafta delegation, please contact: **tradepolicy@gafta.com**.

https://www.fao.org/cfs/plenary/cfs52/en/

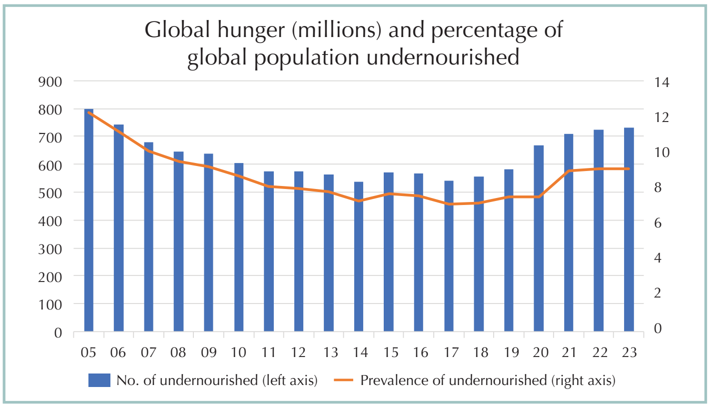
SOFI Report, 2024

The report **Food Security and Nutrition in the World, 2024** was published in July, showing the world is still off track to achieve SDG2 (zero hunger by 2030). It found that between 713M and 757M people faced hunger in 2023 (9.1% of global population), a marginal increase on 2022. Around 2.3 billion people (29% of global population) were moderately or severely food insecure in 2023, and the major drivers of hunger and malnutrition (conflict, climate variability and extremes and economic slowdowns) have increased in frequency and intensity in recent years. Africa has the highest proportion of its population facing hunger (20.4%, or 298M people) while Asia has a greater number of people facing hunger (385M, or 8.1% of the population), and regional differences within the continents are stark.

The report discusses the need for an indicator of diet quality in the SDG indicator framework and proposes a new SDG2 indicator for the 2025 Comprehensive Review. Work in Bangladesh on improving gut bacteria, for example, is showing significant improvements in reducing the numbers of people who are malnourished. The report compares the cost and affordability of a healthy diet across regions; about 35% of the global population cannot afford a healthy diet and in Africa this proportion increases to 65%.

The need to quantify financing availability and needs is a focus of the 2024 SOFI report, which calls for improved coordination and targeting of finance to improve food security and nutrition, pointing out the heavy costs (social, economic and environmental) of inaction in this area. More efficient allocation of public spending in the agriculture sector could have a positive impact on agri-food output, jobs and the number of people lifted out of poverty, according to recent research in Africa. Innovative sources of funding are discussed, along with the need for better data collection and collaboration between the public and private sectors.

The SOFI Report 2024 can be found here:
https://www.fao.org/agrifood-economics/publications/detail/en/c/1707842/



> *"Projections indicate that with a continuation of past trends, millions of people will still be undernourished by 2030."*
>
> SOFI report, 2024

EU progresses sustainability agenda

The EU's **Corporate Sustainability Due Diligence Directive** (CSDDD) (Directive 2024/1760) entered into force on 25 July 2024. It imposes due diligence obligations for large companies to implement a climate transition plan and to carry out measures to address any adverse effects on human rights and the environment arising from their operations worldwide. This will be reinforced by the **Forced Labour Regulation**, expected to apply from 2027. The **EU Deforestation Regulation** is due to apply from 30 December 2024 (though there is significant pressure to delay). More analysis of these will be in the next edition of Gaftaworld.

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Gafta APPROVED ANALYST

"Show me the money"

Asset Disclosure Orders as an aid to enforcement of unpaid arbitration awards

By Andrew Patrinos, Partner, Jackson Parton assisted by Dr Andria Alexandrou

Whilst the majority of Gafta Arbitration Awards are, in the writer's experience, honoured by the losing parties, there will always be a small number that are not.

Whilst Gafta does administer a list of defaulters which may be checked by members and may influence a decision whether to do business with a proposed counterparty, that does not really assist the party to whom substantial amounts of damages may be due.

This problem arose in a recent case in which the author was instructed, albeit that it involved FOSFA, rather than Gafta contracts.

Ten FOSFA Arbitration Awards had been obtained by five Claimants against Astagra Ltd (also known as Astagra LLP or Astagra TOO) ("Astagra"), a Kazakhstan company, but Astagra did not honour any of the Awards. FOSFA runs a similar scheme to Gafta for reporting defaults. Accordingly, the Claimants reported the defaults and Astagra was listed.

As this did not result in payment the Claimants applied to the Commercial Court in London under s.66 of the Arbitration Act 1996 to register the Awards in the same manner as a judgment or order of the court to the same effect. That application was granted and five orders (one for each of the Claimants) were made by the Court. At the same time an application for an Asset Disclosure Order ("ADO") was made to seek to identify assets of Astagra.

The application for an ADO was heard in November 2023. Despite being notified of the hearing, no-one from Astagra attended. His Honour Judge Pelling KC granted the ADO requiring Astagra to provide an affidavit of assets worldwide within 14 days. The ADO included a Penal Notice addressed to:

a. the Directors and Officers of Astagra, including Mr Kanat Shaikhin, the current Director of Astagra; and

b. any other person who knows of the Order, including Mr Tair Batalov, the former Director of Astagra, who the Claimants believed still retained de facto control over Astagra, and does anything which helps the Defendant to breach certain terms of the order.

The Penal Notice explained the serious consequences for non-compliance with the Order, including the risk of being held in contempt of court and imprisoned, fined or having assets seized.

Astagra failed to provide the affidavit required by the ADO.

Before the return date the Claimants sought to identify the prospect that officers of Astagra would visit the UK or had assets within the jurisdiction of the court that could be sequestered.

Such investigations gave no direct results and, to avoid unnecessarily utilising court time and in an effort to retain the possibility of sanction, the Claimants wrote to the Court requesting an Order that the ADO be discharged prospectively, on the basis that continuing the ADO in the hope of "voluntary" compliance was unlikely to have a meaningful effect.

However, the Claimants also asked that the discharge be expressly without prejudice to any extant breaches of the ADO or related contempt/s of court or any application which the Claimants may wish to make at a later date. In particular, the Claimants explained that they wished to preserve their ability to bring contempt proceedings or other related applications in the event that this was likely to have a meaningful effect, eg in the event that Mr Shaikhin or Mr Batalov were to travel to England.

An order was granted by the Court on these terms.

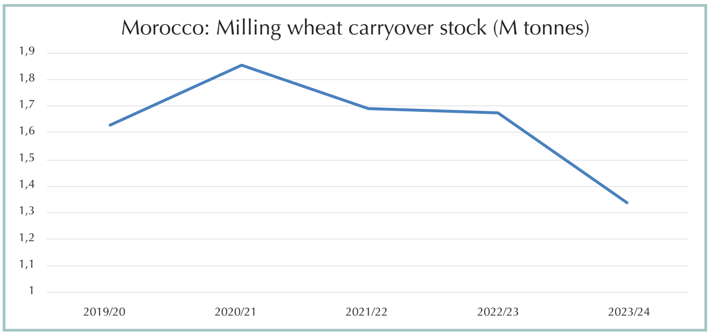
It is too early to say whether this form of order will result in any recovery for the Claimants, but it emphasises that the English Commercial Court is willing to do what it can to aid innocent parties in seeking recovery of sums due under arbitration awards.

2023/24: another “Annus horribilis” for North Africa

By Yann Lebeau, Chef de Mission Maghreb-Afrique, Interceréales France

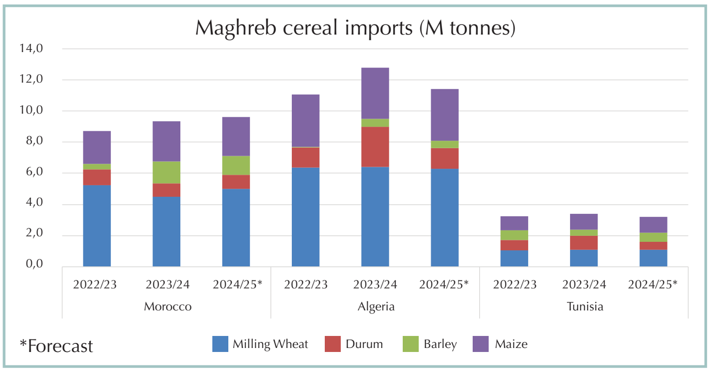
It is not usual for the three Maghreb countries to suffer from the same climatic event at the same time in the same year. This was the case in 2023, when a record drought hit the entire region, forcing Morocco, Algeria and Tunisia to import almost all of their cereal needs from the world market.

During the 2023/24 campaign, through its private importers, Morocco bought 4.5M tonnes of milling wheat, more than 54% of which was from France. In addition to durum wheat and maize, the Kingdom imported a record 1.5Mt of barley to feed the local authorities’ livestock protection plan. Throughout the 2023/24 marketing year, the government continued to subsidise private importers, but they did not hold much stock at the end of the period, as can be seen from the graph below, which shows a carryover stock at the end of the marketing year of barely three months’ consumption, the minimum required by the government as a safety stock.



As usual, the Tunisian board imported 1.1M tonnes of bread wheat (mainly from Russia and Ukraine) to meet its domestic needs. The impact of the drought was particularly felt for durum wheat, for which the government had to import more than usual, to over 800,000 tonnes during the campaign, including large quantities from Turkey.

Algeria’s official grain board OAIC bought around 6.4Mt of milling wheat in 23/24, including 2.3Mt from Russia, 1.5Mt from France and 1Mt from Romania. In addition, 2.5M tonnes of durum wheat, 0.5M tonnes of barley and 3.3M tonnes of maize were imported.



The 2023/24 season was one of record imports for this part of the world, with a total of more than 25Mt of cereals bought on the world market.

Crop 2024 and marketing year 2024/25

Tunisia has returned to an acceptable level of durum production in 2024, with around 650,000 tonnes expected to be harvested for an annual consumption of around 1.1M tonnes. This will allow it to postpone the start of its imports... probably to November. On the other hand, nothing has changed for breadmaking wheat, as demonstrated by the tender launched on 21 August for 75,000 tonnes, financed by the World Bank. Tunisia will still need 1.2M tonnes of milling wheat in 2024/25.

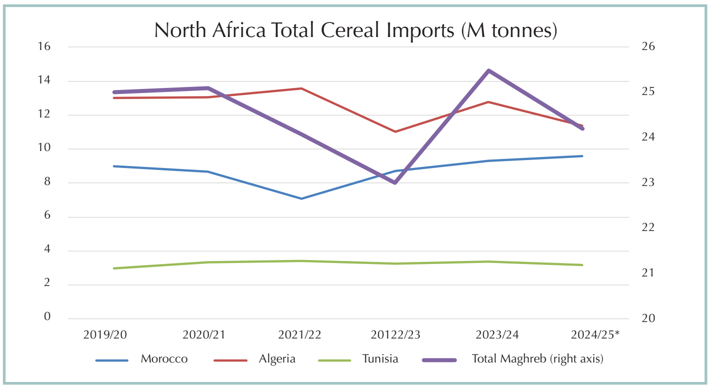
In **Algeria**, local durum production in 2024 was good at 2.4M tonnes, which should allow the country to supply its domestic market for a few months. At this stage, we estimate Algeria’s durum needs for the next marketing year at 1.4M tonnes. There are a number of points to bear in mind regarding Algeria. The presidential elections have been brought forward from December to September. The agricultural development programme for the country’s southern provinces, recently announced by the government, reiterates the goal of self-sufficiency and provides for the irrigation of 1 million hectares of desert in the long term (by 2030) for all types of agricultural production, including cereals. This ambitious plan, like the one implemented by Saudi Arabia a few years ago, could ultimately reduce the country’s dependence on the international market.

Nevertheless, Algeria will still be present in 2024/25 and we expect it to buy at least 6M tonnes of milling wheat.

Morocco, meanwhile, suffered another drought during the 2024 production season. This is the sixth drought in the last 10 years... Unfortunately, the Kingdom’s production will again be insignificant this year, with sown area down from 3.7M ha to 2.5M ha.

In 2024/25, for the third year in a row, Morroco will have to find 100% of its grain needs on the world market. We are talking about 5M tonnes of milling wheat and 0.9M tonnes of durum, plus 1M tonnes of barley and 2.5M tonnes of maize.

This region of the world remains and will continue to remain, one of the principal areas for world grain trade.



*Forecast

OECD-FAO Agricultural Outlook 2024-2033

Selected highlights for Gaftaworld by Edith Laget, Policy Analyst, Trade and Agriculture Directorate, OECD

The OECD-FAO Agricultural Outlook 2024-2033 offers a comprehensive analysis of the ten-year prospects for agricultural commodity and fish markets at national, regional and global levels. It analyses trends in the demographic and economic drivers of agricultural commodity supply and demand, projects the shifts in production and consumption locations, and assesses the resulting changes in international trade patterns. Produced jointly by the OECD and FAO for 20 years, in collaboration with their Members and international commodity organisations, the *Outlook* serves as a structured reference for policy planning, especially in the context of the recent global COVID-19 pandemic, rising geopolitical tensions and the increasing impact of climate change.

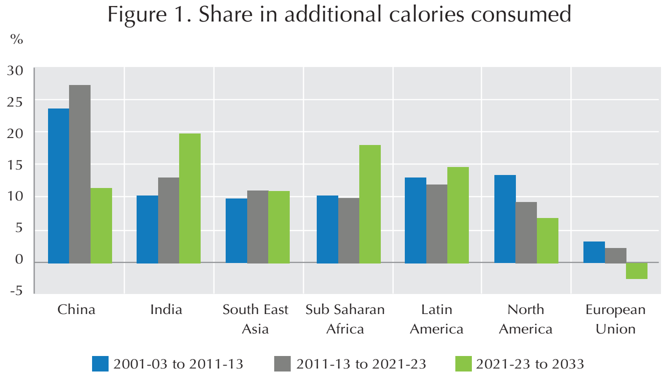
Shifting patterns

Emerging economies have increasingly driven global agricultural market developments over the last 20 years and are projected to continue to do so over the next decade, but with regional shifts linked to changing demographics and new economic affluence.

The next decade will see increasing roles for India, Southeast Asia and Sub-Saharan Africa, while China's role declines. China's share of global agricultural and fisheries consumption growth is projected to drop from 28% to 11% due to a declining population, slower income growth and stabilised nutrition patterns.

India and Southeast Asian countries are projected to account for 31% of global consumption growth by 2033, driven by urbanisation and rising affluence. Sub-Saharan Africa will contribute 18% of additional global consumption, primarily due to population growth-driven food demand.

Figure 1. Share in additional calories consumed



Source: OECD/FAO (2024), "OECD-FAO Agricultural Outlook".

Consumption:
Projected evolution for 2024-2033

Total use of agricultural and fisheries products (as food, feed, fuel and other industrial raw materials) is projected to grow by 1.0% annually over the next decade, located largely in emerging countries. In middle-income countries, average daily per capita calorie intake will increase by 7% by 2033, driven by greater consumption of staples, livestock products and fats. Calorie intake in low-income countries will grow at 4%, too slowly to achieve the Sustainable Development Goal target of zero hunger by 2030.

Cereal demand is projected to continue to be driven by food use, followed closely by feed use. By 2033, 41% of all cereals will be consumed directly by humans, 36% will be used as animal feed, and the remainder will be processed into biofuel and other industrial products.

Production:
Projected evolution for 2024-2033

Growth in crop production is projected to come mainly from yield increases on existing land rather than expanded cultivation. Similarly, growth in livestock and fish production will largely result from yield improvements, reducing agriculture's greenhouse gas emissions intensity. However, direct agricultural emissions are projected to increase by 5% over the next decade.

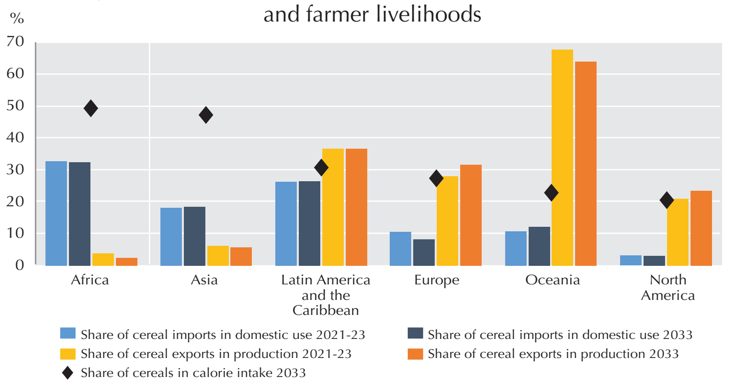
Despite these expected yield improvements, particularly in least productive countries in Africa and Asia, significant gaps will persist, challenging farm incomes, food security and increasing food import needs. Yield challenges for oilseeds are expected to continue, with slow growth or declines in major producers like Indonesia and Malaysia for palm oil, and the EU and Canada for rapeseed.

Trade:

Projected evolution for 2024-2033

Well-functioning international agricultural commodity markets will remain important for global food security, as 20% of calories are traded, and rural livelihoods can benefit from participation in markets and global agrifood value chains. Notably, cereal imports are expected to contribute a significant share of domestic consumption in Africa and Asia, where cereals represent a large share in calorie intake (Figure 2).

Figure 2. Cereal trade will remain important for food security and farmer livelihoods



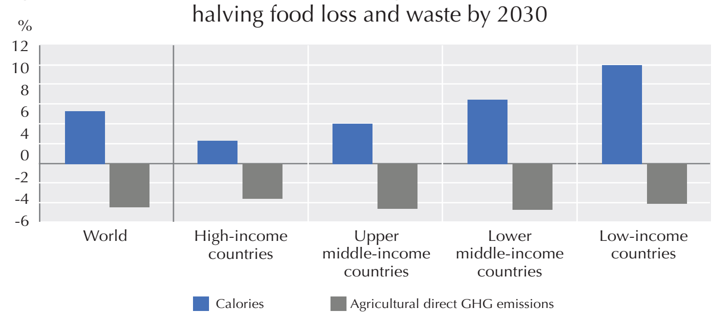
Note: These estimates include intra-regional trade except for the European Union.
Source: OECD/FAO (2024), "OECD-FAO Agricultural Outlook".

While trade expansion in oilseeds and products is slowing, 40% of the world's soybean production is traded internationally. Soybean trade expansion is linked to projected slower growth of soybean processing in China, with Brazil as the largest exporter. Other oilseeds have lower traded shares compared to production, about 13%, with Canada, Australia and Ukraine projected to account for 71% of world exports by 2033.

Scenario analysis shows the implications for food systems of halving food loss and waste

This year's *Outlook* features a scenario that simulates the impact of halving food losses along supply chains (including losses occurring during transport) and food waste at the retail and consumer levels by 2030. The scenario projects a potential 4% reduction in global agricultural greenhouse gas emissions by 2030, distributed relatively evenly across countries regardless of income levels. It also projects food prices to fall, resulting in increased food intake in low- and lower middle-income countries by 10% and 6% respectively, potentially reducing the number of undernourished people by 153 million by 2030 (Figure 3). While the scenario highlights potential benefits for consumers and the environment, it also points to challenges for producers, as lower producer prices and decreased production would notably impact their livelihoods.

Figure 3. Impact on calorie intake and agricultural direct GHG emissions of halving food loss and waste by 2030



Note: Emission estimates are based on historical time series from the FAOSTAT Climate Change: Agrifood systems emissions databases which are extended with the Outlook and Scenario databases. The 38 individual countries and 11 regional aggregates in the baseline are classified into the four income groups according to their respective per-capita income in 2018. The applied thresholds are: low: < USD 1,550, lower-middle: < USD 3,895, upper-middle: < USD 13,000, high: > USD 13,000.
Source: OECD/FAO (2024), "OECD-FAO Agricultural Outlook".

Information and data from the *Outlook*, including the main conclusions, is freely accessible at: **www.agri-outlook.org**

Higher yields, consistent quality making 2024 U.S. wheat more competitive

By Tyllor Ledford, Market Analyst, U.S. Wheat Associates

After three years of drought that reduced total production, the 2024 U.S. wheat harvest stands out as the most promising in recent memory, with higher yields for five of the six distinct wheat classes grown in the United States.

USDA's August 2024 World Agricultural Supply and Demand Estimates (WASDE) estimated total U.S. wheat production at 53.9M tonnes, a 7% increase from the previous year. Although markets remain volatile, increased production, prices near multi-year lows and consistently high quality are making U.S. wheat supplies more competitive in the world market.

Harvest in the Southern and Central Plains was nearly complete by mid-August. Warm weather and improved moisture accelerated crop maturation across the **hard red winter wheat (HRW)** growing region. The August WASDE put HRW output at 21.1M tonnes, a 29% increase from last year. Early HRW quality tests showed excellent quality with strong test weights of 80.1 kg/hl and average protein levels of 13.6% (dry matter basis).

In August, USDA estimated **soft red winter wheat (SRW)** production in the Midwest, eastern and southern United States at 9.3M tonnes, 24% below last year, driven by lower planted area and hot, dry conditions. As a result, quality data shows slightly elevated protein levels of 11% (dry matter basis) and a lower test weight of 77.7 kg/hl.

By mid-August, rain had temporarily slowed the **hard red spring wheat (HRS)** harvest, but development remained on schedule with harvested area at 18% complete, slightly below the five-year average. Harvest conditions are mixed. North Dakota yield potential is excellent due to cooler weather and timely rain, while Montana had drier conditions and expects lower yields. Nonetheless, USDA estimates HRS production at 13.6M tonnes, a 7% year-over-year increase.

USDA forecasts that U.S. **northern and Desert Durum®** production will reach 2.1M tonnes, a 31% increase from the previous year and the highest since 2018. Northern durum is grown in the same region, and will reflect similar yield potential, as HRS.

In the Pacific Northwest, forecasts predict the **soft white (SW)** wheat harvest will rebound by 23% to 7.8M tonnes, thanks to timely rains and balanced temperatures that increased yield potential. U.S. Wheat Associates' "Harvest Report" on 23 August estimated SW winter wheat at 82% harvested, while SW spring variety harvest was at 49%. Early quality testing indicated desirable low protein for high-quality cake and pastry flour, and strong test weights. The current sample average protein is 10.3% (dry matter basis), while test weights hover around 80.2 kg/hl.

U.S. Wheat Associates expands USDA's WASDE report for wheat each month at **https://www.uswheat.org/market-information/supply-and-demand/.**

Codex Committee on Pesticide Residues – 55th Session

By Alan Ding, Director, Gafta Beijing Office

On behalf of Gafta, I attended the 55th Session of the Codex Committee on Pesticide Residues (CCPR55) in Chengdu, China on 3-6 June 2024. The Session was chaired by Dr Weili Shan, with Dr Lifang Duan as Vice Chair, assisted by Chief Advisor Dr Xiongwu Qiao. The Session was attended by 150 delegates from 48 member countries and 13 Observer Organisations (including Gafta). Further details were given in Gafta Circular No. GN/2024/143.

New Codex MRLs and priorities for 2025

The Committee agreed to advance 259 new MRLs to the 47th Session of the Codex Alimentarius Commission (CAC47), due to meet in November, for final adoption. The EU and Switzerland recorded reservations on some of these MRLs, which relate to 29 pesticides. The table shows the commodities relevant to Gafta members and the pesticides for which new Codex MRLs were agreed by CCPR. For full details on the proposed MRLs for specific commodities please refer to Appendix II of the report, which can be found on the CCPR55 webpage*. Appendix III details the 117 previously adopted Codex MRLs that the CCPR recommends CAC47 revokes. Some of these have been replaced by new MRLs based on additional data (and are in Appendix II), while others relate to uses no longer supported or those that have been found to have potential dietary intake concerns.

For ethylene oxide and 2-chloroethanol, the committee was informed that the Codex Committee on Contaminants in Food would be assessing these with its associated expert committee with a view to setting a Maximum Limit (ML) for this compound to avoid/minimise negative trade impacts.

For 2025, six pesticides (plus two reserves) have been put forward for scientific evaluation, including spidoxamat for soybeans and tiafenacil for barley, cotton, maize, oilseed rape, pulses and wheat. There will also be MRL evaluations of "new" uses of 20 compounds (with three reserve compounds) for commodities including cereals and oilseeds.

Pesticide/commodity combinations for which MRLs were advanced to CAC47

Pesticide	Relevant commodities for which MRLs have been proposed[1]
Iprodione	Beans with pods (*Phaseolus* spp)
Propiconazole	Peanuts, rice
Difenoconazole	Maize
Clothianidin	Cumin seeds
Fluopyram	Barley, buckwheat, oats, rye, sorghum, triticale, wheat
Thiamethoxam	Cumin seeds
Acetamiprid	Soybeans
Cyantraniliprole	Dry beans, dry peas
Imazapyr	Rice, wheat
Isoflucypram	Barley, triticale, wheat
Florylpicoxamid	Lentils, chillis, rapeseed, wheat
Isocycloseram	Cotton seed, maize, chillis, soybeans
Mepiquat Chloride	Cotton seed and cotton meal
Tricyclazole	Rice

[1]*Proposed MRLs apply to specific products of these commodities. Check Appendix II of CCPR report for applicable MRL*

Alan Norden, Board member of the Global Pulse Confederation, who put forward the paper on extrapolation of data to aid the MRL setting process for minor crops, with Gafta's Alan Ding

Enhancing the procedures of CCPR

The US delegation led discussions on enhancing the procedures of CCPR and its scientific evaluation body JMPR (FAO/WHO Joint Meeting on Pesticide Residues), highlighting the need to balance the short-term needs (to reduce the backlog of scheduled evaluations) with longer-term strategic efforts to improve JMPR's working procedures. The Working Group, chaired by USA and co-chaired by Costa Rica and Uganda, was re-established to support work on addressing the short-term needs while considering the long-term strategic needs and the USA stated it would continue to explore how to improve financial and other types of support for the work of JMPR.

The Minor Use Foundation (MUF), on behalf of the Global Pulse Confederation (GPC), submitted a paper for discussion: "An Analysis of Previous Decisions by CCPR to Establish MRLs for Tomato and Pepper to Establish Corresponding MRLs in Eggplant". This approach of extrapolating data from different subgroups may benefit minor crops with the setting of more MRLs. The importance of Codex and the need to strengthen crop group work to establish more efficiently MRLs for minor crops were fully supported and further work will continue this year.

During the week, I also attended a side event chaired by GPC, where the outcomes of the fourth Global Minor Use Summit held by MUF were discussed. Delegates agreed on the need to build political will and support investments in minor crops as well as data generation.

The next meeting of CCPR (CCPR56) is tentatively scheduled for the second half of May next year.

***https://www.fao.org/fao-who-codexalimentarius/meetings/detail/en/?meeting=CCPR&session=55**

Sarah Cahill appointed new Codex Secretary

The Codex Alimentarius Commission (CAC) announced in June that Sarah Cahill had been appointed as the new Secretary of the CAC. She has had extensive experience in international institutions working on food safety, including specific foods destined for food insecure and vulnerable populations, and fair practices for trade. More details are here:
https://www.fao.org/fao-who-codexalimentarius/news-and-events/news-details/en/c/1697330/

Türkiye: Grain outlook and challenges for MY 2024/25

By Gülfem Eren, Agron Tarım A.Ş

The grain world has fundamentally changed over the last few years. The pandemic, the geopolitical tensions sparked by the Russia-Ukraine war, climate change, other global uncertainties and the impact of populist policies in Türkiye and around the world have produced increasingly unpredictable grain trade patterns, driven more by political decisions than traditional supply-demand dynamics. So, I must emphasise that the forecasts here should be taken with a grain of salt.

When evaluating the state of the new marketing year (MY) in Türkiye, the starting point should be the Turkish Grain Board's (TMO) stocks. As noted in previous reports, the policies implemented before the 2023 presidential elections led to record levels of imports, followed by unprecedented grain purchases by TMO. In MY 2023/24, TMO was unable to reduce its stocks of milling wheat and barley and entered 2024/25 with significant carryover stocks. Since the 2024 wheat and barley harvest came in below expectations TMO's domestic grain purchases were lower than we anticipated, amounting to 5.0M tonnes. High interest rates and the government's determination to control grain prices led the private sector to refrain from domestic purchases beyond short-term needs and opportunities.

According to our estimates, TMO is entering 2024/25 with around 11.0M tonnes of wheat stocks, including durum wheat. This implies that the government will likely continue to regulate the market with the aim of reducing its stocks and it is highly probable that the wheat import ban announced in June will be extended from mid-October until year's end.

Türkiye's 2024/25 production of **milling wheat** is estimated to decrease by 2.0M tonnes to 15.0M tonnes compared to the previous year, while **durum wheat** production is expected to remain unchanged at 4.0M tonnes. **Barley** production is forecast to decrease by 0.5M tonnes to 7.5M tonnes. The ongoing **maize** harvest is also expected to decrease by 20%, to 7.0M tonnes.

The right to export grains remains in place, but as the domestic market prices are higher than world prices, durum wheat exports, which reached approximately 1.4M tonnes last year, stood at only 0.3M tonnes between 1 June and 31 July 2024. However, should the Turkish lira significantly depreciate in the coming months, durum wheat exports may pick up. In 2023/24, feed maize exports surprisingly reached a high 2.3M tonnes despite no excess supply. This was largely due to the fact that TMO's storage facilities were full during the 2022/23 harvest, and it was unable to make further purchases. Consequently, Türkiye re-imported 2.2M tonnes of feed maize between September 2023 and July 2024.

Türkiye's flour exports unexpectedly rose from 3.3M in 2022/23 to 3.9M tonnes in 2023/24, equivalent to an increase of approximately 1.0M tonnes in milling wheat imports. How flour exports will evolve in the new marketing year depends on the timing of the discontinuation of the import ban, and if the ban remains, whether TMO will supply flour exporters from its stocks. However, considering the strong performance and importance of Turkish flour exporters in recent years, we expect that TMO will somehow accommodate their concerns. The fundamental issue here is whether TMO will be allowed to sell its stocks at a loss.

In 2023/24 Türkiye imported 8.3M tonnes of milling wheat. One of the main reasons for this higher-than-expected figure was the increase in flour exports. The level of Türkiye's milling wheat imports during 2024/25 remains a difficult forecast. If the import ban is extended and TMO is willing to supply wheat from its current stocks to flour exporters, the decline in milling wheat imports could be significant - down around 25% from last year. The state's barley stocks appear sufficient to last several seasons, and barley imports for 2024/25 are expected to be minimal. For maize, we estimate imports to reach around 2.5M tonnes due to both a decline in production and the low level of stocks.

As Marguerite Yourcenar puts in the tongue of retiring wise emperor Hadrian, "I had reached the point where I felt that the most ordinary debate on such a subject as importation of Egyptian wheat would have taught me more about government than would the entire Republic of Plato." So, I leave you to worry about all this as I make my plans for retirement.

Gaftaworld would like to thank Gülfem for her harvest reports from Türkiye over the last eight years. We wish her a happy and long retirement.

EU and UK summer harvests are disappointing; autumn harvest outlook does not look positive either

By Vincent Braak, Crop Analyst, Stratégie Grains by Expana

Winter crop acreages sharply down year-on-year

Europe's leading arable crop, soft wheat, was undoubtedly one of the most negatively affected by weather conditions during the 2024 harvest. Autumn sowings were largely impacted by incessant rain, particularly in western and northern Europe. As a result, winter wheat acreages have fallen by double-digit percentages compared to the previous campaign in many European countries, including France, Germany and the UK. Winter wheat areas decreased sharply also in the Benelux countries, Ireland, Central Europe and the Baltic region. Farmers partially replaced unseeded areas with spring wheat in northern Europe. EU27+UK soft wheat acreage is estimated to be down by 6% compared to the 2023 harvest, to 22.1Mha, nearing the low acreage area of 2020.

The drop in acreage is even steeper in the case of rapeseed (-10%). Sowing intentions were already down in northern Europe (due to reduced attractiveness and crop rotation considerations). Moreover, weather conditions were deplorable for sowings in Romania and Bulgaria due to the drought in early autumn. Conversely, the overly wet conditions that prevailed during late summer hindered rapeseed sowings in Scandinavia. Rapeseed area mostly shrank in Romania, Poland, the Czech Republic, Denmark, Sweden and the UK, where pests were a problem.

Compared with the 2023 harvest, European winter barley area is down more moderately than wheat and rapeseed (-3%). Acreages rose slightly in Germany, Poland, the Baltic States and Bulgaria, but fell in southern Europe, Hungary and France. After the wet autumn, many farmers in western and northern Europe switched their unsown winter crops plots in favour of spring crops. Bolstered by attractive prices, spring barley was one of the best possible alternatives. Weather conditions have been unfavourable in much of Europe. Farmers struggled to complete their plantings, and many have postponed them until late spring. Finally, it was impossible to drill the crop in loamy and waterlogged soils. As a result, European acreage has not expanded as much as the market had expected this winter.

Except for rapeseed, the persistence of rainy conditions in France made it difficult to fulfill all sowing intentions, firstly affecting winter cereals, then spring barley and finally summer crops.

Despite a modest decrease due to the lower French area, the total European sunflower acreage is again high this year, particularly in Bulgaria and Romania, where it has gleaned some acreages at the expense of grain maize. On the other hand, the EU soybean area is estimated to have risen significantly, mainly driven by higher acreages in Italy and Central Europe. The soybean area is estimated to have declined in France and Romania after rather disappointing harvests in previous campaigns and adverse weather conditions in spring.

Bad year for European farmers

Harvesting began more than a week ahead of schedule in central and eastern Europe. However, harvest progress in western Europe lagged behind due to slow grain ripening, as well as frequent storms and heavy showers.

Even if each year brings its disparities, harvest results are overall gloomy and will not improve the economic health of the European agricultural sector, already weakened by multiple crises. Indeed, grain prices and production have decreased compared to the 2023 harvest, thus reducing farmers margins. Excessive rainfall, lack of sunshine and spring frosts in the case of rapeseed are the main meteorological factors highlighted to explain the major production losses in Europe this season. In some places, rainfall totals were more than double the seasonal norm during the autumn and winter. Frequent heavy downpours have jeopardised labour in the fields or greatly reduced its effectiveness (such as herbicide applications). Wheat and barley production has plummeted year-on-year, particularly in western Europe, France and the Benelux countries which were more severely affected by the damp conditions. These countries, along with Germany, are set to reap their smallest cereal crop for decades. UK winter crop production is also sharply reduced because of the area decrease and lower yields. To a lesser extent, winter grain production has also declined in Poland and central Europe. Besides Italy, wheat and barley yields increased in southern European countries, as well as in Bulgaria and Romania compared to the previous year. Scandinavia, Finland and Baltic States production is also up year-on-year.

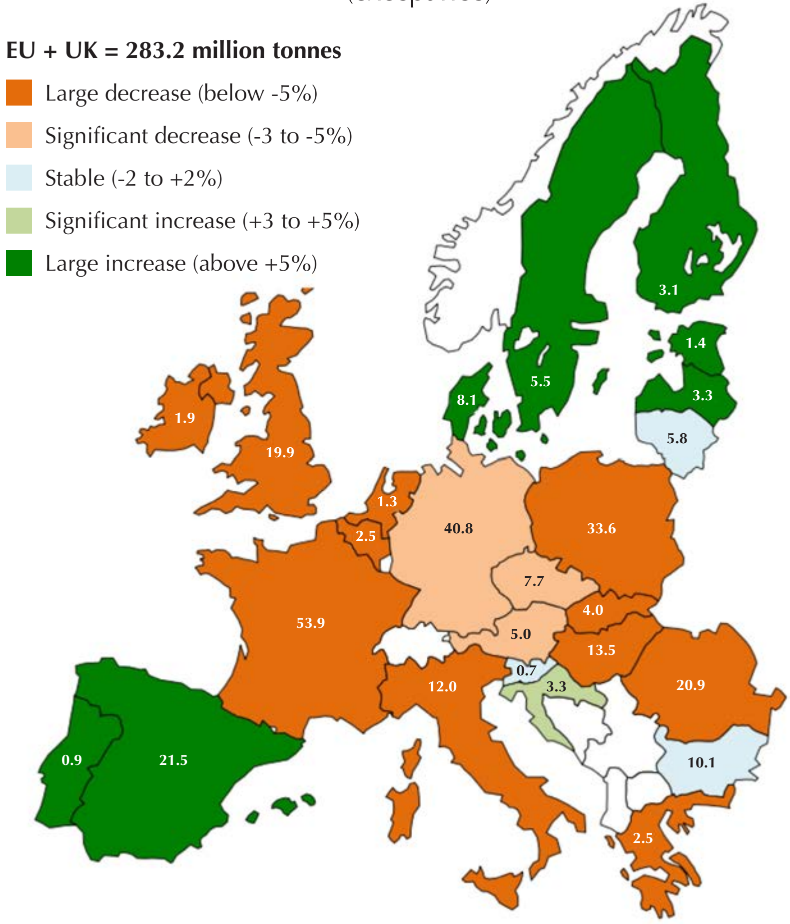
Except in the north of the EU and a few pockets in southern countries, rapeseed yields are disappointing in almost all EU countries. Major yield decreases have been experienced in central EU and Romania. At EU-27+UK scale, **rapeseed** production fell by more than 15% year-on-year. It is estimated at just 17.8Mt, compared with 21.2Mt in 2023/24. **Soft wheat** production is estimated down by

13.5Mt to less than 128Mt (i.e. -10% and its lowest level since the 2012 harvest). **Winter barley** production is also steeply down year-on-year, by more than 4Mt to 28.9Mt (-12%). **Spring barley** output grew by 34% (mainly driven by increased crops in Spain, Germany, Scandinavia and the UK) and thus more than offset the winter barley production decrease. **Total EU-27+UK barley** production is estimated at 57.8Mt, up from 54.5Mt in 2023/24. It is worth reminding that this level is significantly below the 5-year average (-3%).

Barley quality is not good. Kernels are small and test weight ranges are down compared to normal years, with many batches below commercial standards. European wheat is also of poorer milling quality than in previous years. The verdict is widely the same in the EU and in the UK: low test weight, much more wheat is not reaching 76 kg/hl required for milling wheat exports. Protein content is also rather low and is a criterion for downgrading many batches to feed wheat. Traditionally, Baltic, Polish and German wheat shows much higher protein content than other EU origins. Protein content is greatly down compared to normal for these northern wheat producers (mean values down by more than 1%). Premium wheat quality is thus scarcer in the EU market. Fortunately, the rainy conditions have had no major impact on Hagberg falling numbers and mycotoxin levels. Among the EU's main exporting countries, Bulgaria and Romania are the exceptions, with domestic milling wheat at their highest ever for recent years.

Although there are wide variations, rapeseed oil content is satisfactory (over 44% in many places), but this is only a small compensation for the production decrease.

Total grains productions in Mt and variation vs. 2023/24 (except rice)



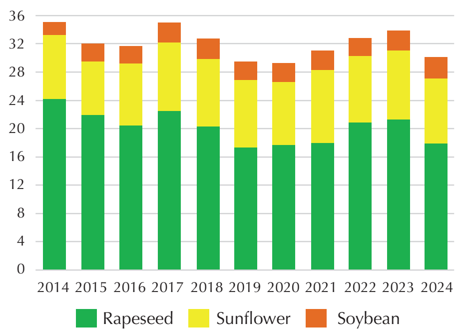
Sunflower and soybean crop prospects tarnished because of hot and dry summer

The picture for winter crops is gloomy. Unfortunately, the outlook for summer crop production is not encouraging either. EU sunflower harvests tend to be in full swing in September but will likely be postponed later than usual across western Europe. Black Sea countries have been hit by the summer dryness and recurrent heatwaves. These conditions increased concerns about production prospects in Bulgaria and Romania, who are major EU producers. Southern regions of Hungary also suffered from water shortages and high summer temperatures. Sunflower harvests have been successful in Andalusia, and the central and northern regions of the Iberian Peninsula should also benefit from better yields than in 2023. Production is expected to be lower in France due to poor planting conditions (adverse weather and pest pressure). Because of lower yields, EU **sunflower** production is currently expected to decrease to 9.3Mt vs. 9.8Mt in 2023.

Soybean production should also be penalised by adverse weather patterns in some areas. Crop establishment took place amid adversely cool and wet conditions in Italy after turning to warm and dry weather during the summer.

Soybean crops have also been affected by the lack of precipitation in Romania and Croatia. EU **soybean** production is forecast to be close to 2.9 Mt slightly up vs. 2023/24, driven in particular by the higher acreage.

EU + UK oilseed production in Mt



Join us on 11 June for the Gafta Dinner 2025!

The Gafta Annual Dinner is available to book online. With over 80 tickets sold in our first week, we are sure this is going to be another sell-out event. Make sure you secure your spot soon to ensure you aren't disappointed.

BOOK NOW:
https://www.gafta.com/Events/Gafta-Annual-Dinner-2025-11-June-2025-London-UK/81568

Career questions answered by Gafta's Director General and President!

Join us on 25 September 2024 at the Hyatt Regency Denver, USA for an exclusive opportunity to receive personal career guidance from industry leaders. Jaine Chisholm Caunt OBE, Director General and CEO of Gafta, and Rebecca Jones, President of Gafta, will be offering one-on-one advice sessions. This will take place within the 'Women in Agribusiness Summit' taking place on 24-26 September.

With decades of experience in global trade, policy and agriculture, Jaine and Rebecca are perfectly placed to help you navigate your career in agribusiness.

Limited Slots Available!

Two 20-minute sessions per hour from 0900 to 1500
To book, email: **events@gafta.com**

Who Should Attend?

Women in agribusiness who are ready to take the next step in their careers.

Jaine Chisholm Caunt OBE
DG and CEO of Gafta

Rebecca Jones
President, Gafta

Gafta proposes five mentors for FAO-IAFN Women Mentorship Programme

The third cohort of the FAO-IAFN mentorship programme, for which Gafta has proposed five new mentors, will be launched in October. Started in 2022, this programme pairs 50 women entrepreneurs from African countries with 50 global leaders in the agriculture sector as mentors. The second cohort, which ran from October 2023 to June 2024 saw mentees from 17 African countries representing all parts of the agri-food value chain benefit greatly from the one-on-one mentorship programme. They also completed two mandatory courses (business development and market access) and an optional course on the FAO eLearning Academy. Gafta has nominated some of the mentors for each cohort and we are very grateful to all those who have become involved, particularly Jelica Kujundzic, Commercial and Risk Director, Commodities and Freight Integrators (CAFI), DMCC, who has volunteered as a mentor for the third year running. If you are interested in becoming involved, further information is given here: **https://agrifood.net/iafn/projects/women-sme-accelerator-programme/**

"We have met 18 times, and soon to meet for the 19th time. My mentor has met all my expectations from this mentorship program. She has strengthened my skills in financial management, market research and management of part time employees. With her, I managed to win a small grant to develop a prototype of another product. The innovation will co-sale with the existing product to increase the sales of the agribusiness."

Elizabeth Kabakoyo, Founder and CEO of Glowish Agro Solutions, Uganda

Q&A with Gafta's new Qualified Arbitrator – Magdalena Nowak-Parsons

Congratulations to Magdalena Nowak-Parsons on passing Gafta's Arbitrator Diploma. She kindly agreed to answer a few questions from Gaftaworld on her career to date and her experience of Gafta's training programme. Magdalena, who speaks English, French, German and Polish, is now registered, with her contact details, on Gafta's list of Qualified Arbitrators, which can be found on the Gafta website.

Could you tell us about your current job and the company you are working for?

I am working at Holbud Limited as Trade Execution Manager. We are located in Fitzrovia, London, UK and are trading agricultural commodities such as wheat, barley, corn, soybeans, soybean meal and sugar as well as containerised rice, pulses and oilseeds, mainly to East African and Middle Eastern destinations.

My main responsibilities include drafting of and approving commodity contracts, laytimes, vessel allocations and nominations and the overall supervision of trade execution operations, making sure that all deadlines are met and all other contractual terms are adhered to. I especially enjoy the close interaction with the chartering desk and the planning of our physical loads and finding practical solutions for our daily challenges in shipping and contracts.

Could you tell us about your career to date? Any plans for the future?

I started my career in the agri-commodity world as an apprentice at Alfred C. Toepfer in Hamburg. The two-year rotation system, in which I was able to become acquainted with various bulk commodities, origins and destinations, as well as many visits to the Hamburg port to experience the loading of our vessels, set the foundation for the future. After working in the execution department at some of the largest international commodity trading houses in Hamburg e.g. ADM, Bunge and GrainCorp, the move to London in 2021 brought me closer to the legal foundation of our grain trade, which is Gafta/FOSFA and English law.

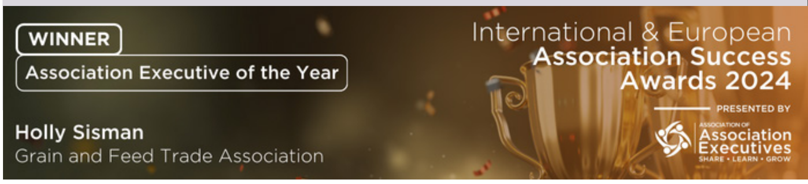
While studying the Gafta DLP modules and later during my preparations for the Arbitrators exam, I understood the confidence that the Gafta and FOSFA contracts give to the trade. In the event that the parties require a dispute resolution, the highly experienced Arbitrators can be trusted to find the appropriate commercial or technical solution. There are incredible learnings to be taken out of previous published cases and I am eager to proceed with my very first own cases soon.

How did you find the Gafta training and Arbitrator Diploma?

I am pleased with the wide range of training courses that Gafta is offering and I believe them to be an excellent tool for education, but also for expanding the network which is vital and useful in our industry. I would recommend the DLP modules to everyone who wants to place their already existing knowledge of the commodity trade within a legal framework.

Gafta's Holly Sisman – Association Executive of the Year

Holly Sisman, Gafta's Operations Manager, has been awarded the 2024 'Association Executive of the Year' in the prestigious International and European Association Success Awards. The judge's comments state: "Holly emerges as a dedicated, proactive and highly competent Association Executive. I'm deeply impressed by her capability to be innovative in times of crisis where prompt responses are needed. Holly has demonstrated the ability to combine both strategic and operational aspects of her role, showing attention to detail alongside strategic and political acumen." This is a fitting award in what marks Holly's 10-year tenure at Gafta this September.



The role of Gafta Approved Analysts in international trade

As Gafta Analyst Members are currently undergoing the second round of the Gafta Ring Test Scheme, Gafta's Technical Manager, Sarah Mann, explains the importance of the Scheme and why using Gafta Approved Analysts is important to international trade.

Why ISO Methods and nothing else?

At Gafta we acknowledge that there are many different methods of analysis available for grain and feedingstuffs; however, only ISO methods are acceptable under Gafta rules. ISO methods have wider global recognition and acceptance which is beneficial for international trade. ISO methods undergo rigorous testing and validation to ensure their accuracy and reliability and are developed through collaborative efforts involving industry experts and stakeholders. Gafta's Technical Manager Sarah Mann has a place on two ISO committees contributing to the methods development and review, as do some of Gafta's committee members, creating a two-way flow of information ensuring that trade requirements are considered as part of the process.

ISO methods also represent efficiency and cost-effectiveness, helping laboratories optimise the use of equipment and personnel and promote a culture of continuous improvement. Furthermore, the use of ISO methods contributes to legal and regulatory compliance. Many countries have trade regulations based on ISO standards for grain quality and safety, as well as for ensuring food safety and consumer protection.

For more information about ISO, and to purchase methods of analysis, please visit **www.iso.org**

Gafta APPROVED ANALYST

At time of writing, there are 259 Gafta Approved Analysts. We specify 'at time of writing' because this number changes all the time, as new members achieve the requirements or as members are removed from the list due to expired certificates, issues at audit or failing the Gafta Ring Test Scheme. It is imperative that the current status of an analyst is checked each time an analysis is requested.

The Gafta Ring Test Scheme's second round is currently underway. Laboratories have until 5 November to submit results from samples sent in early August. This scheme evaluates analysts' ability to produce accurate and consistent analytical data for commodities traded under Gafta contracts. Successful participation, along with either Gafta Standard or ISO 17025 certification, is required for inclusion in the Gafta Approved Register of Analysts.

According to the Code of Practice, Gafta Approved Analysts must use methods listed under the Gafta No.130 Register of Analysis Methods for analyses carried out for goods traded under standard Gafta contract terms. Following a detailed review of the methods of analysis in 2017, it was decided to implement specified ISO methods of analysis for the parameters listed in the Gafta No.130, which are those parameters commonly specified in the quality terms of contracts.

ISO methods ensure consistent, accurate and reliable results globally. By standardising procedures, ISO methods improve data comparability, facilitate fair trade and support quality control. They also help laboratories meet legal and regulatory requirements while increasing efficiency.

Hans van der Moolen, from Gafta Approved Laboratory Eurofins Food & Feed Testing in Rotterdam is a member of the Approved Registers Committee and was part of the Expert Group who completed the 2017 review. He explains, "ISO methods ensure that analysis procedures are standardised across different laboratories worldwide. This guarantees consistency in results, regardless of location, while standardised methods allow for accurate comparison of grain quality data between different countries and regions."

The Gafta Ring Test Scheme requires that Analyst Members test samples of feed and/or grain for the typical quality parameters listed in a contract of sale. For all samples this is moisture and protein, and additionally for feed, ash, oil and fibre should be tested. When receiving the samples, Analyst Members should consider the product they have been sent and select the appropriate ISO method from the Gafta No. 130. Where there is more than one method for a quality parameter, the method should be appropriate to the product, including its format if it has been processed. Members are now required to specify the method they have applied when uploading their results for the Ring Test Scheme.

As with the Ring Test Scheme, Analysts should consider the appropriate ISO method to use when carrying out analyses commercially. Certificates/reports of analysis must reference the method used as this could be important in case of a dispute on quality. Johny Boerjan (SGS Geneva), Chair of the Approved Registers Committee and Gafta Arbitrator adds, "The use of ISO methods provide consistent analysis which is essential for fair trade practices and dispute resolution. They mean traders can have greater confidence in the accuracy of grain analysis results."

It is important that Analysts pay particular attention to detail when selecting and reporting the correct ISO methods to use for both the Gafta Ring Test Scheme and commercial analysis. Using the correct ISO method ensures that analytical data is comparable across different laboratories in the Ring Test Scheme and is essential for maintaining fair and accurate trade practices in the commodities market. Upon reviewing data from the most recent rounds of the Ring Test Scheme, Approved Registers Committee member Philippe Bastijns (SGS Oleotest) noted that, "Often outlier results in the Ring Test Scheme are due to the incorrect method being selected for the product. This underlines the importance of selecting the correct method in a commercial situation, but also can impact on the Laboratory's Approval status. It is such an important step in the process."

In conclusion, Gafta Approved Analysts play a crucial role in ensuring fair and efficient trade in the global grain, feed and related commodities markets. Their expertise and adherence to Gafta rules builds trust among traders, leading to smoother transactions, efficient trade processes and a reduction in uncertainties and disputes.

To find out more about Gafta Approved Analysts and the Gafta Approved Registers, please visit **www.gafta.com/approved-registers**.

Gafta Ring Test Scheme – Checklist

- ✓ Samples were dispatched during the first week of August – please let us know if you have not received your samples
- ✓ Ensure your samples are in good condition when received – any damaged samples should be reported to Gafta as soon as possible
- ✓ Consider the samples you have received – ensure you select the most appropriate ISO method from the Gafta No.130
- ✓ Perform the analysis and upload your results to the portal in good time, preferably within 2 weeks of receipt. This helps us to help you in case of problems!
- ✓ Attention to detail is essential – ensure you input results accurately and have reported the correct ISO method
- ✓ Check your email receipt – any changes can be made in the portal until the round closes, but CANNOT be rectified later!
- ✓ Only members who have not uploaded results receive reminders – please do not ignore!
- ✓ The closing date for the Ring Test Scheme is **5 November 2024** – we cannot accept late results after this date

Revised Ring Test Scheme Protocol and Portal Instructions were published on the Gafta website on 1 August. Please visit **www.gafta.com/analysts** to access them. Any queries relating to the Gafta Ring Test Scheme should be sent to **RingTest@gafta.com**

Johny Boerjan *is the Vice President of Global Technical Governance at SGS. He holds master's degrees in agricultural and chemical engineering. He has a long history of involvement in the Gafta Technical Committees, has chaired the Approved Registers Committee since its establishment and has served on the Gafta Council. Additionally, Johny is an active Gafta Arbitrator and technical expert to Gafta's Global Trade Policy Committee. His extensive experience in the industry makes him a valuable asset to the Gafta Approved Registers.*

Philippe Bastijns *graduted as a Master of Chemical Engineering from the University of Antwerp. He has extensive experience spanning almost four decades with Oleotest (now SGS Oleotest) covering all aspects of laboratory operation and management, including the achievement of ISO17025 accreditation. Philippe has been involved with Gafta committees for many years and has been instrumental in the development of the Approved Analysts Scheme.*

Hans van der Moolen *graduated with a PhD in analytical chemistry from the University of Amsterdam. For almost 20 years Hans has worked for Eurofins in The Netherlands, holding roles in laboratory management, quality assurance and most recently international food integrity. Hans has been an active member of Gafta's Analyst Expert Group and Approved Registers Committee for many years, providing technical expertise on the Gafta Ring Test Scheme.*

Seedcake: Gafta advocacy to simplify transport requirements at the UN

Seedcake is transported in significant quantities with over 350M tonnes produced and transported annually. Over the years, many countries have tried to harmonise and simplify the UN transport requirements for seedcake across all codes: IMSBC for bulk, IMDG for containers or within the UN Model Regulation.

Gafta is supporting these initiatives to simplify the regulatory requirements as many of the entries including UN2217 and UN1386 have been in use since the 1970s. Industrial processes have improved over the years with more oil extraction, as have sustainability and environmental concerns in our industry. With various thresholds for oil and moisture in each UN transport code, the current proposal is intended to simplify the regulatory structure; it reflects current practices, decades of experience and creates a clear demarcation of what products should be regulated and what products are safe for transport without being classified as a dangerous good.

First discussions on Gafta's proposal took place at the 64th meeting of the UN Committee of Experts on the Transport of Dangerous Goods in late June. Countries were generally supportive of simplifying and harmonising the UN model regulations and supportive of the paper, which asked for 4% oil and 15% oil and moisture combined for four seedcakes (soybean meal, rapeseed meal, sunflower seed meal and cottonseed meal), above which a self-heat test would be required. However, countries called for a more comprehensive data set on all four products that would be subject to the exemption.

We thank all our members for sharing data and being involved in this process. Our members have been testing and shipping these products for decades and are consistently finding that at or below the proposed levels of "not more than 4% oil and not more than 13% moisture", the self-heating tests are always negative. These thresholds are supported by the data collected; the seedcake industry believes that those thresholds represent the appropriate level of safety for exclusion from the dangerous goods regulations.

Gafta will continue discussions with countries and at the UN Committee on dangerous goods which will take place at the end of November after which we will report on progress.

Thailand approves gene editing for crop production

Thailand's Minister of Agriculture and Cooperatives signed new legislation in July to provide for approval of gene-edited organisms. The new regulation, titled "Certification of Organisms Developed from Genome Editing Technology for Agricultural Use, B.E. 2567 (2024)," aims to position Thailand as a global leader in agricultural innovation, promoting research and development of gene edited organisms. The new law took effect on 15 August; on the same day, the Department of Agriculture published its notification titled "Criteria, Methods, and Conditions for Certification of Plants Developed Using Genome Editing Technology". Applicants for certification must show that GE crops only contain genetic material from organisms that can naturally breed together. Among the first crops to be piloted will be maize and soybeans, both of which are imported into Thailand, as well as energy crops such as sugarcane and oil palm.

GB delays implementation of third review of the list of High-Risk Food and Feed of Non-Animal Origin

The third review and proposed amendments to the list of imports of high-risk food and feed into Great Britain were expected to be adopted and published on 24 October, but due to the recent general election this is delayed, probably until December 2024. As part of that process, the UK has notified the WTO of its revised list of food and feed of non-animal origin subject to a temporary increase of official controls when entering Great Britain from countries listed in the regulation.

This is due to the risk of contamination by aflatoxins, pesticide residues, dyes, preservatives, pentachlorophenol and dioxins. The list includes products such as sesamum seeds, cumin, guar gum, nutmeg, ground nuts and many others detailed in the Annex. Countries most affected are Argentina, Brazil, China, Colombia, Ecuador, Georgia, India, Israel, Madagascar, Sri Lanka and Türkiye. As a reminder, the fourth review is already underway and will open for public consultation in March 2025.

April 2024 saw documentary, physical and identity checks introduced at GB borders for high-risk products. There was a transitional phase-in system with a focus on poultry and porcine products, high risk food and feed and infant formula in the first instance. Delays in development of IT systems slowed down the implementation of further streams. The Imports Intelligence Hub (IIH) run by the Food Standards Agency (FSA) provides information on a range of border data and intelligence connected with the import of high-risk food and feed of non-animal origin (HRFNAO) (as well as products of animal origin). Data on HRFNAO imported into the United Kingdom via approved designated ports is available monthly.

Ecuador progresses on use of ePhyto certificates

Ecuador began the process for the issuance of ePhyto electronic phytosanitary certificates in 2023, and has progressively started issuing digital phytosanitary export certificates to other countries for Ecuadorian exports. In a submission to the WTO's SPS Committee Ecuador pointed out that "illegal trade based on falsified certificates has been the main cause of many environmental problems (crop loss, invasive plants and diseases)." It states that ePhyto certificates allow for information to be obtained in real time, helping to improve planning, and reducing the time required for administrative procedures, increasing the shelf life of products and preventing food waste. Ecuador called for Members' collaboration in initiating the data transmission tests and informed the Committee that, in the medium term, it would start to receive electronic phytosanitary certificates from other countries.

Jochem Versloot elected President of CELCAA

The European Liaison Committee for Agricultural and Agri-Food Trade (CELCAA) elected Jochem Versloot, Co-Owner of the Jan Zandbergen Group in Netherlands as President at its AGM in July. He takes over from Marcel van der Vliet, who was President of CELCAA since 2019. Dr Ignacio Sanchez Recarte, Secretary General of CEEV, is now Vice-President, and Flora Dewar, Director Sustainability and Trade Policy at COCERAL, is the new CELCAA Treasurer.

NEW MEMBERS

Full contact details for all members are available on the Gafta website Members Directory

CATEGORY A – TRADERS

AFF MARKETING
Australia
T: +61 2 6752 5795
W: https://australianfoodandfibre.com.au/
C: Mr Andrew Donovan
E: adonovan@australianfoodandfibre.com.au

AGROHELLAS S.A.
Greece
T: +30 698 053 0326
W: www.agrohellas.com
C: Mrs Liana Anastasiadou
E: l.anastasiadou@agrohellas.com

AZIMUT COMMODITY TRADING DMCC
United Arab Emirates
T: +971 542 450 670
C: Mr Pavel Moroz
E: pmoroz@azimuttrading.com

DORUK UN SANAYI A.S.
Türkiye
T: +90 531 377 8144
W: www.dorukun.com.tr
C: Mr Safak Erbap
E: serbap@dorukun.com.tr

LL-RESOURCES GMBH
Austria
T: +49 162 377 1749
W: www.ll-resources.com
C: Mr Nick Egert
E: nick.egert@ll-resources.com

MERA ENTERPRISES DMCC
United Arab Emirates
T: +971 43 236 659
W: www.meraglobal.com
C: Mr Neal Sahni
E: execution@mera-international.com

CATEGORY B – BROKERS

JUN WEI INTERNATIONAL CORP.
Taiwan
T: +886 7335 9186
C: Mr Lin Yi-Chiang
E: eaglelin.tw@gmail.com

CATEGORY C – SUPERINTENDENTS

AUSTRALIAN INSPECTION SERVICES GROUP
Australia
T: +61 447327746
C: Mr Kristian Just
E: kjust@symbiolabs.com.au

BENUA SURVEYOR MARKINDO, PT
Indonesia
T: +62 812 3640 1112
C: Ms Radita Az Azhara
E: bsmarkindo@gmail.com

BUREAU VERITAS TESTING INSPECTION SA PTY LTD
South Africa
T: +27 112 176 300
C: Miss Portia Mauwane
E: portia.mauwane@bureauveritas.com

EAG SURVEYOR BV
Netherlands
T: +31 6 28699581
W: https://eagsurveyors.com
C: Mr Manuel Buzzi
E: europe@eagsurveyor.com

ICAS INTERNATIONAL CONFORMITY ASSESSMENT SERVICES INC. (TSE GLOBAL)
Türkiye
T: +90 535 017 4133
W: www.tseglobal.com.tr
C: Mr Eyüp Hamdi Kabasakal
E: hkabasakal@tseglobal.com.tr

LS INSPECTION SERVICES
Türkiye
T: +90 543 637 4320
C: Mr Levent Öztürk
E: levent@lsinspection.com

SAYBOLT INSPECTION SERVICES KAZAKHSTAN LLP
Kazakhstan
T: +7 701 920 8830
W: www.corelab.com/saybolt/
C: Ms Sholpan Bekmurzayeva
E: sholpan.bekmurzayeva@corelab.com

TÜV RHEINLAND PHILIPPINES, INC.
Philippines
T: +63 2 8812 8887
W: www.tuv.com/philippines/en/
C: Mr Ariel Aragoncillo
E: ariel.aragoncillo@tuv.com

CATEGORY D – ARBITRATORS

DR MATTHIAS SPAINK
Switzerland
T: +41 77 475 94 14
E: spaink.arb@protonmail.ch

MR ROHIT KUMAR
India
T: +91 901 577 1653
E: rohit.sidhar@gmail.com

CATEGORY F – ANALYSTS

ASSURANCE LABORATORY, L T FOODS LIMITED
India
T: +91 986 802 6622
C: Dr Ashraf Hassan
E: ashraf.hassan@ltgroup.in

EUROFINS FOOD TESTING UK
United Kingdom
T: +44 1449 721192
W: www.eurofins.co.uk
C: Mrs Natalie Shead
E: natalie.shead@ftuki.eurofins.com

SGS UNITED KINGDOM LIMITED
United Kingdom
T: +44 1642 549333
W: www.sgs.com/en-gb
C: Mr Geoff Brearley
E: geoff.brearley@sgs.com

TANKOIL
Egypt
T: +20 01099802003
W: https://tankoilgroup.com/
C: Mr Mohamed Saleh
E: m.saleh@tankoilgroup.com

CATEGORY G – PROFESSIONAL FIRMS

BUREAU VERITAS SINGAPORE
Singapore
T: +65 9780 4700
W: www.bureauveritas.com
C: Mr Colin Wakefield
E: colin.wakefield@bureauveritas.com

HFW SINGAPORE LLP
Singapore
T: +65 6411 5300
W: www.hfw.com/
C: Suzanne Meiklejohn
E: suzanne.meiklejohn@hfw.com

SHEARD SCIENTIFIC
United Kingdom
T: +44 7471 995920
W: www.sheardscientific.com
C: Dr Daniel Sheard
E: daniel@sheardscientific.com

T. PARKER HOST, INC.
United States
T: +1 757 627 6286
W: www.tparkerhost.com
C: Mr William Davis
E: wdavis@tparkerhost.com

CATEGORY K – GENERAL PRODUCE

P.G. IMPEX
India
T: +91 98 3058 8884
W: www.pgindiagroup.co.in
C: Mr Bharat Kumar Pujara
E: pujara.gaurav@gmail.com

CATEGORY L – STUDENTS

MR MALEK EL PHIL
United Kingdom
E: mal.elp.7.student@gmail.com

CATEGORY M – INDIVIDUALS NOT ENGAGED IN THE TRADE

MR GIANNI PIZZITOLA
United States
E: gianni.pizzitola@gmail.com

2024/25 CALENDAR

Commodity Shipping

1-2	Apr 2025	Barcelona	Sponsored by ARIZON ABOGADOS

Trade Foundation Course

25-28	Feb 2025	London
9-12	Sep 2025	Istanbul

Commodity Contracts

6-7	Nov 2024	Cape Town	*Sponsored by* Fortior Law
26-27	Mar 2025	Rome	*Sponsored by* GAA
22-23	Oct 2025	Buenos Aires	*Sponsored by* Hill Dickinson

Commodity Dispute Resolution

8-9	Oct 2024	Athens	*Sponsored by* GAA
23-24	Sep 2025	Vienna	*Sponsored by* HFW

Social Events

29	Nov 2024	Arbitrators' Luncheon, London
11	Jun 2025	Gafta Annual Dinner, London

Seminars

28	Nov 2024	Arbitrators' Masterclass, London	*Sponsored by* STEPHENSON HARWOOD

For more information on all Gafta events, go to:
www.gafta.com/events

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I VAT Registration No. GB 243 8967 24

Gafta Promoting international trade

The Grain and Feed Trade Association

9 Lincoln's Inn Fields I London I WC2A 3BP I UK
T: +44 (0) 20 7814 9666 I F: +44 (0) 20 7814 8383
E: post@gafta.com I W: gafta.com