

Natural Resources, Agricultural Commodities

2025/26 Grains Crop Quality

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When you need
to be sure

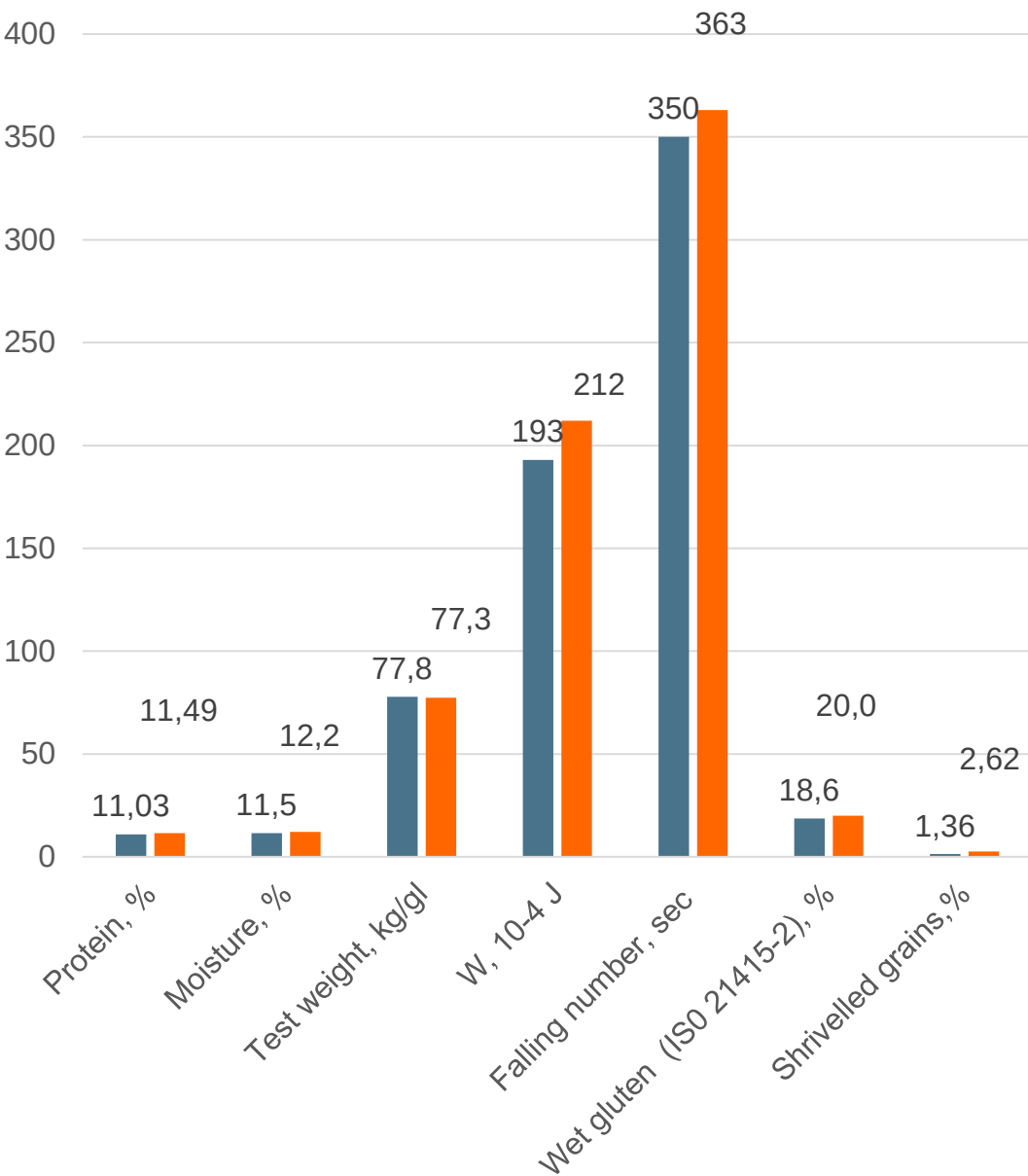


SGS

Crops 2024 & 2025 quality, wheat UKRAINE

PARAMETER (AS PER EN, ISO) / 365 samples tested	Avg. 2024	Avg. 2025	Min. 2025	Max. 2025
Test Weight, kg/hl	77.8	77.3	67.8	84.8
Shrivelled grains, %	1.36	2.58	0.00	39.68
Broken grains, %	3.08	2.42	0.07	10.52
Moisture, %	11.5	12.2	9.1	17.8
Protein on dry matter, %	11.03	11.49	7.7	18.3
Wet Gluten (ISO 21415-2), %	18.6	20.0	10.4	42.6
Falling number, sec	350	363	62	491
Bug-ridden grains, %	0.59	0.69	0.00	13.45
W, 10 -4 J	193	212	38	556

■ 2024 ■ 2025



Crops 2024 & 2025 quality, wheat

- Increase of Shrivelled grains content
- Stable amylase complex. As result the Falling number parameter meets export specification in most cases.
- W range for about 60.8% of the tested samples is between 170-230



Deviations of W, Protein, Wet Gluten and Falling number results, crops 2020 & 2025, milling wheat Ukraine.

Protein dmb



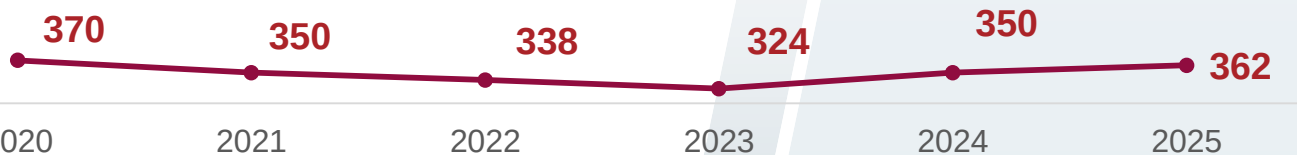
Wet Gluten, ISO 21415-2



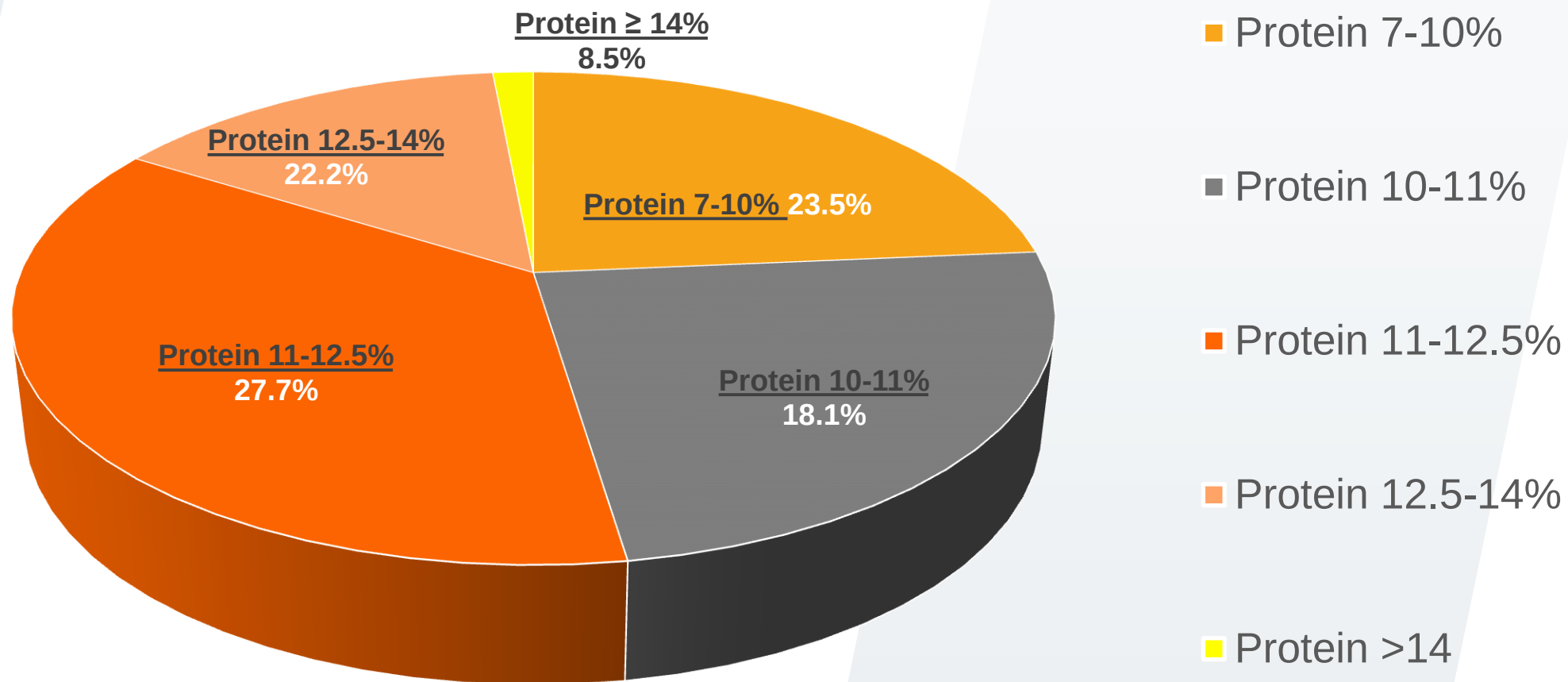
W



Falling number



Distribution per protein level, wheat crop 2025 Ukraine



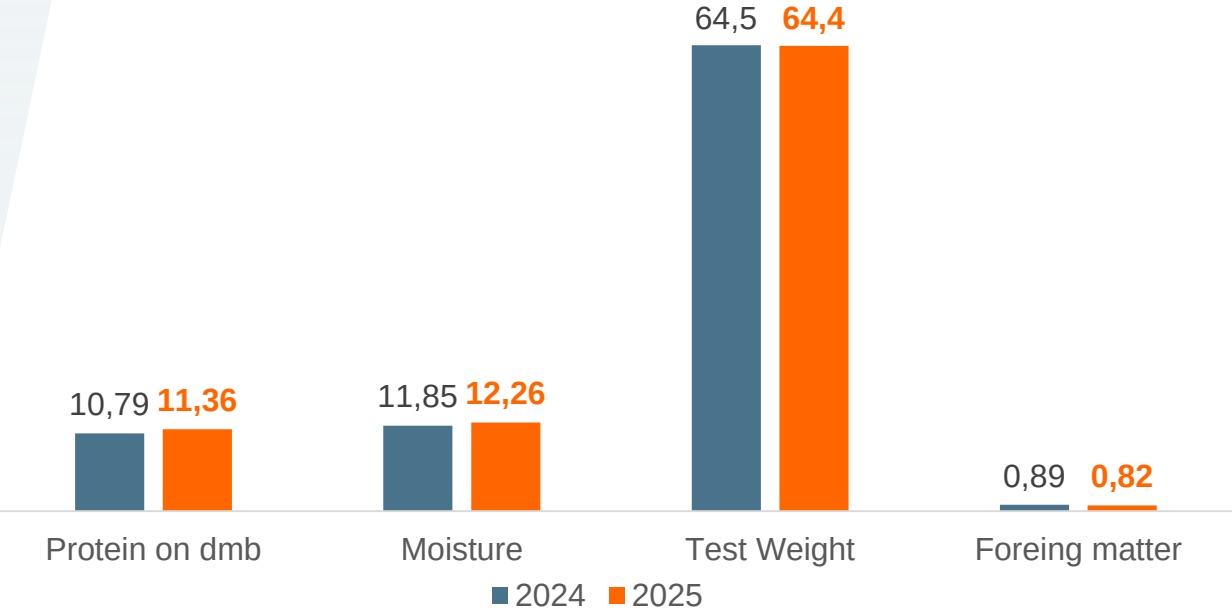


Wheat average export results, July-August'25 Ukraine

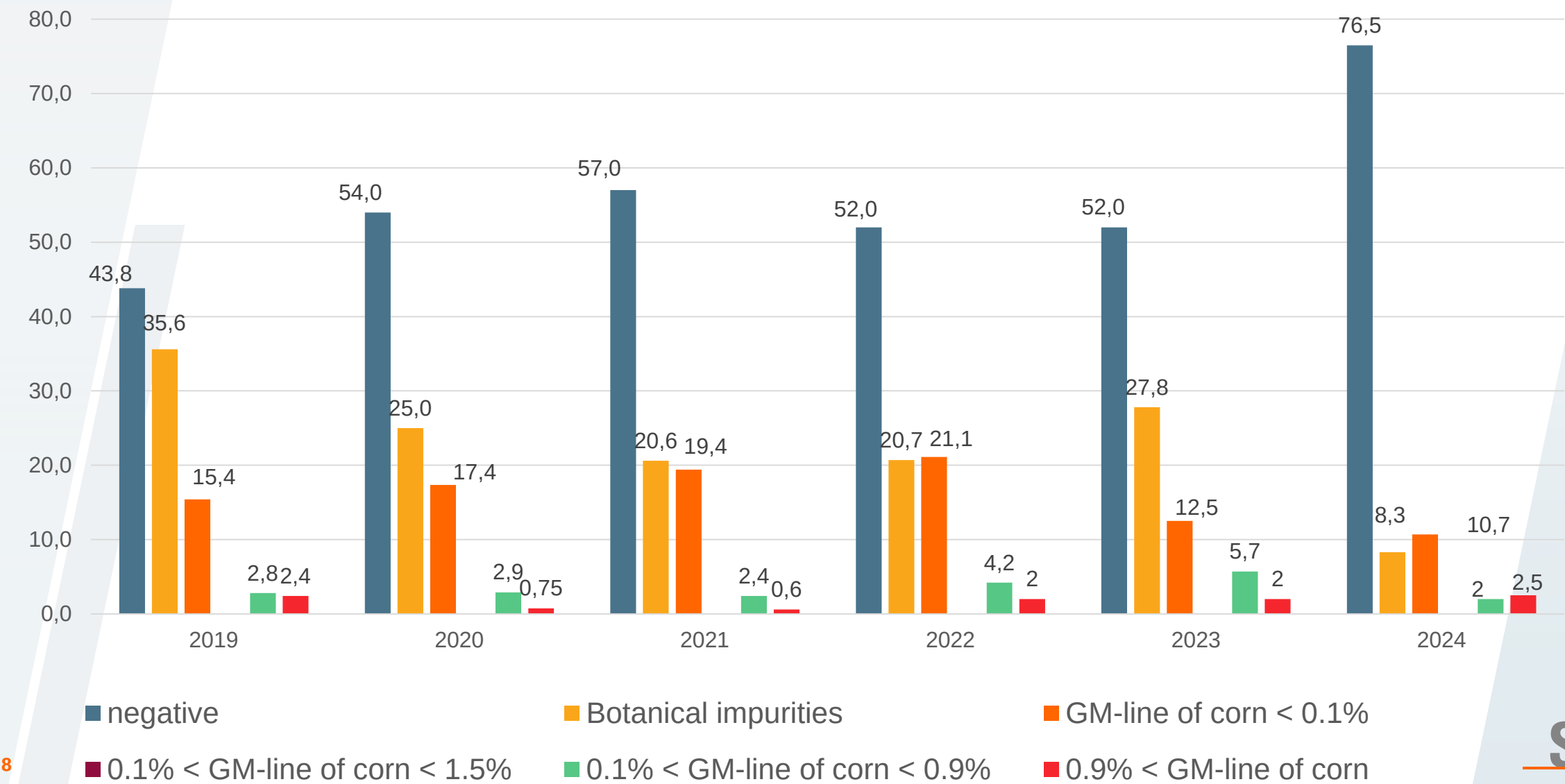
PARAMETER	Average result	Min	Max
Protein, %	11.48	10.19	13.21
Moisture, %	12.03	10.9	13.2
Test weight, kg/gl	79.9	78.8	81.4
W, 10 ⁻⁴ J	265	191	328
Bug damage, %	0.49	0.24	0.89
Falling number, sec	353	292	388
Wet gluten (ISO 21415-2), %	22.3	17.4	25.4

Crops 2024 & 2025 quality,barley (151 samples) Ukraine

Parameter	Avg	Min	Max
Protein	11.36	8.3	16.9
Moisture	12.26	9.4	17.9
Test weight	64.4	46.7	71.6
Foreign matter	0.82	0.07	3.67

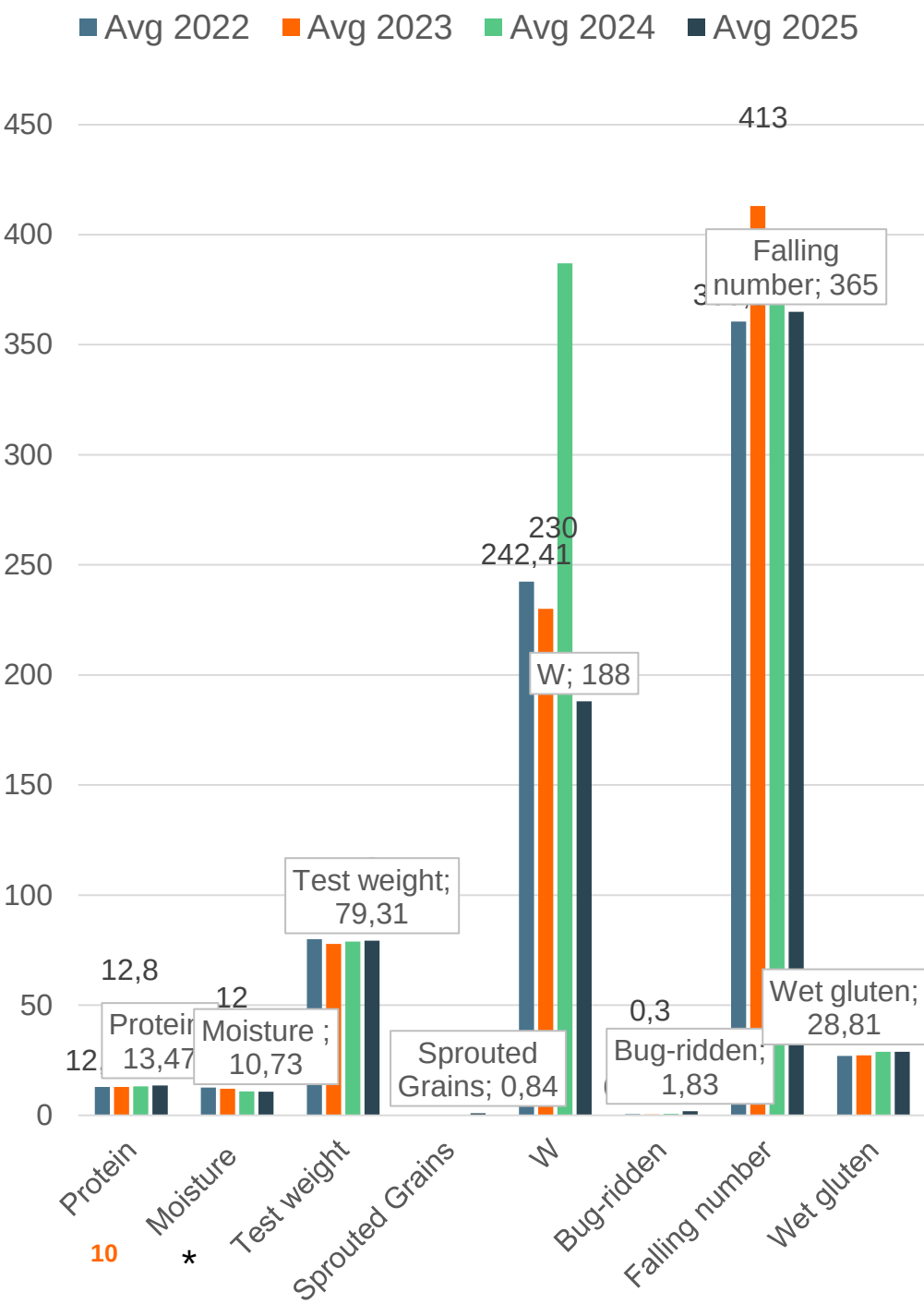


SGS GMO statistics – corn crop 2024, Ukraine



Crops 2023 & 2024& 2025 quality, wheat Romania

PARAMETER (AS PER EN, ISO) / 1295 samples tested	Avg. 2023	Avg. 2024	AVG.2025	Min/ Max. 2025
Protein on dry matter,%	13.06	13.03	13.47	11.35/ 17.45
Moisture, %	10.9	10.89	10.73	8.89/ 13.10
Test weight, Kg/hl	79.13	79.22	79.31	75.3/ 84.9
Sprouted, %	0.21	0.2	0.40	0.02/ 3.7
Bug damaged, %	0.54	0.53	1.83	0.1/ 25
Falling number	393	401.56	365	177/ 491
Wet gluten	28.37	28.35	28.81	23.50/ 39.47
W, 10 -4 J	217	221	188	14/ 418



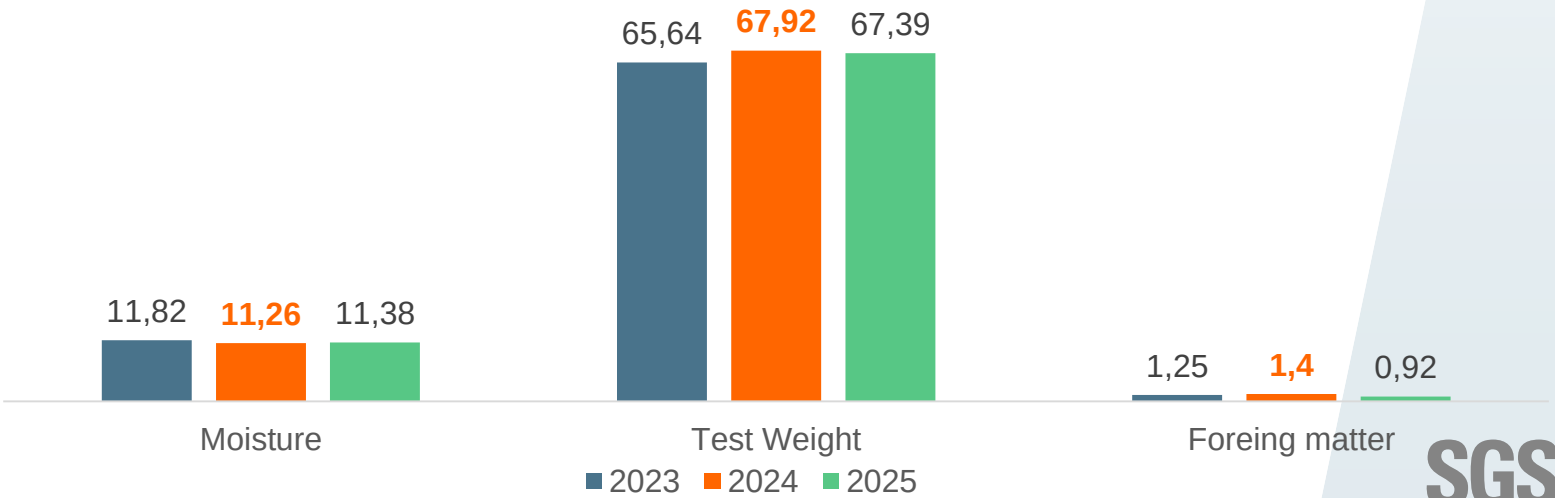
Crops 2022& 2023& 2024& 2025 wheat quality Romania

- Same protein vs average data of 2024 crop
- Same wet gluten quality and quantity
- More bug damaged kernels compared to 2024
- W a challenge in 2025, despite there is wheat with a $W > 200$ (10-4) J
- Within milling wheat W range for most of the tested parcels is between 130 – 190 (10-4)J

Crop 2025
quality,
barley
Romania



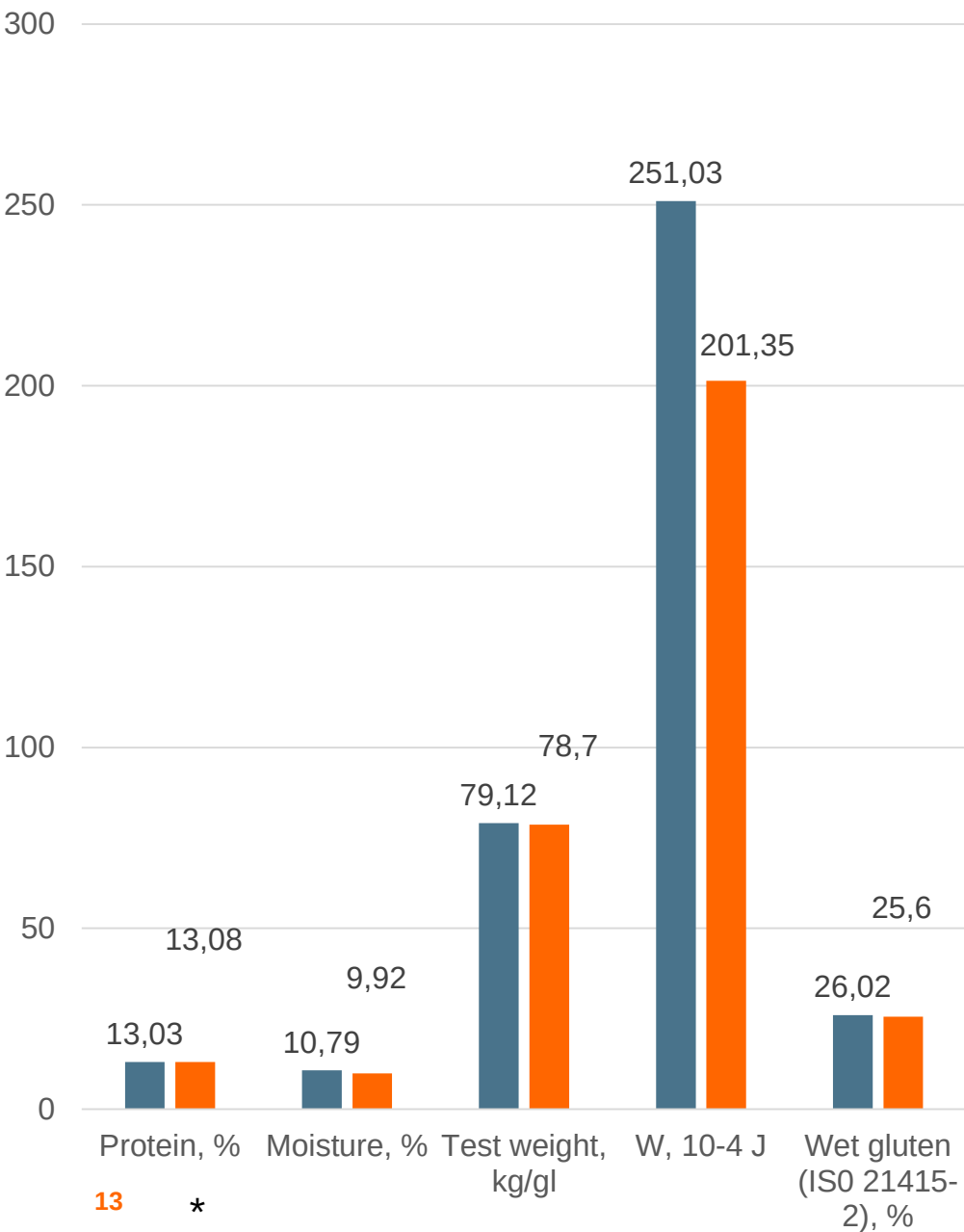
PARAMETER (AS PER EN, ISO) / 375 samples tested	Avg. 2023	Avg. 2024	Avg.2025	Min/ Max. 2025
Test Weight, kg/hl	65.64	67.92	67.39	61.29/ 71.54
Moisture., %	11.82	11.26	11.38	9.83/ 12.81
Admixture, %	1.25	1.40	0.92	0.6/ 1.54
Protein on dry matter, %	n.a.	n.a.	12.21	11.8/ 13.14
DON	189	258	110	110



Crops 2024 & 2025 quality, wheat Bulgaria

PARAMETER (AS PER EN, ISO) / 205 samples tested	Avg. 2024	Avg. 2025	Min. 2025	Max. 2025
Test Weight, kg/hl	79.12	78.7	72.6	84.3
Shrivelled grains, %	1.06	2.44	0.17	10.91
Broken grains, %	3.51	3.16	0.77	7.69
Moisture, %	10.79	9.92	8.41	12.23
Protein on dry matter, %	13.03	13.08	10.4	16.6
Wet Gluten (ISO 21415-2), %	26.02	25.6	15.6	36
Bug-ridden grains, %	0.03	0.44	0.00	12.56
W, 10 -4 J	251.03	201.35	< 40	396

■ 2024 ■ 2025



Crops 2024 & 2025 quality, wheat

- Protein level remain same as previous year
- Negative slight decrease dynamic of wet gluten
- Stable amylase complex. As result the Falling number parameter meets requirements usually above 350 s
- Negative change of bread making characteristics, W decreased. Such level of bug ridden was not been seen last few years



Deviations of W, Protein, Wet Gluten and Falling number results, crops 2020 & 2025, milling wheat Bulgaria.

Protein dmb



Wet Gluten, ISO 21415-2



W



Falling number



2020

2021

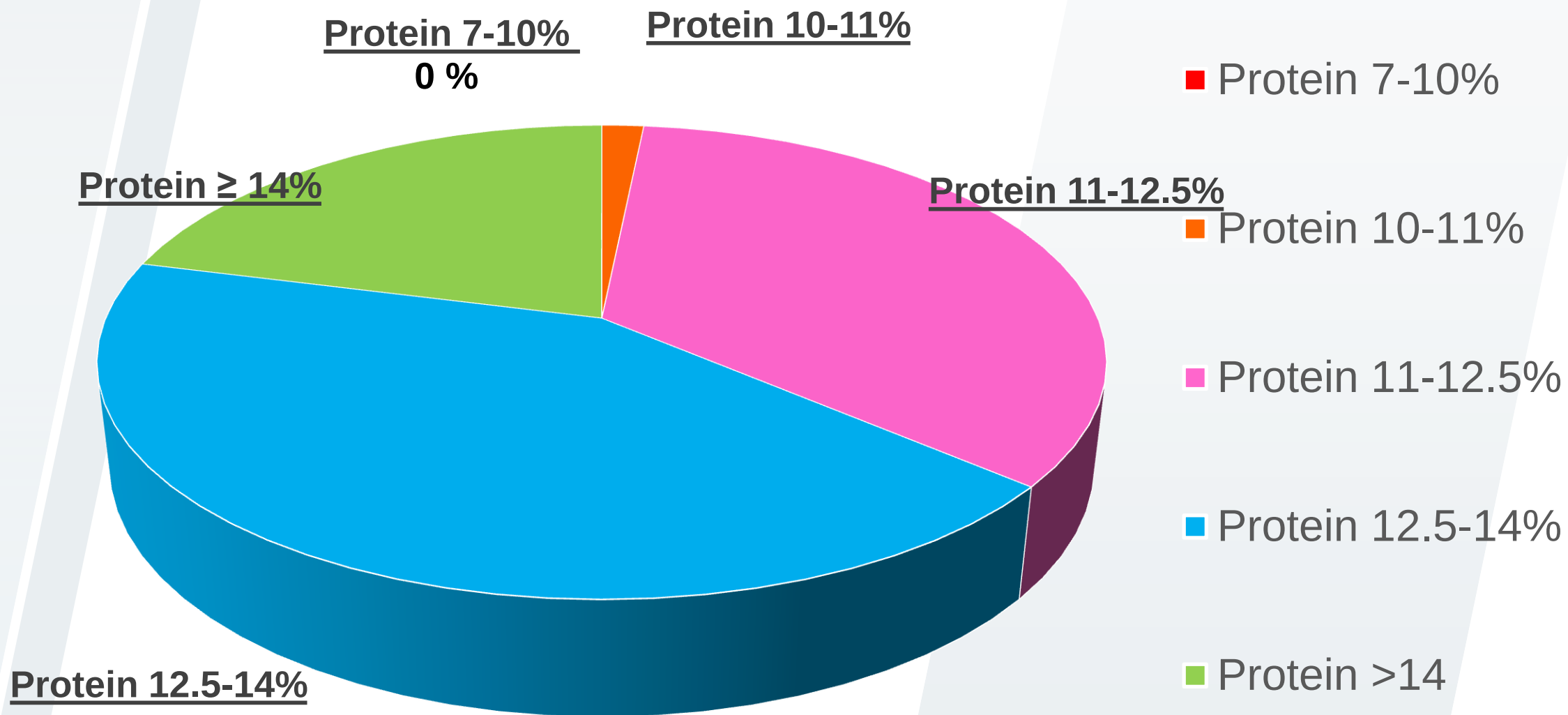
2022

2023

2024

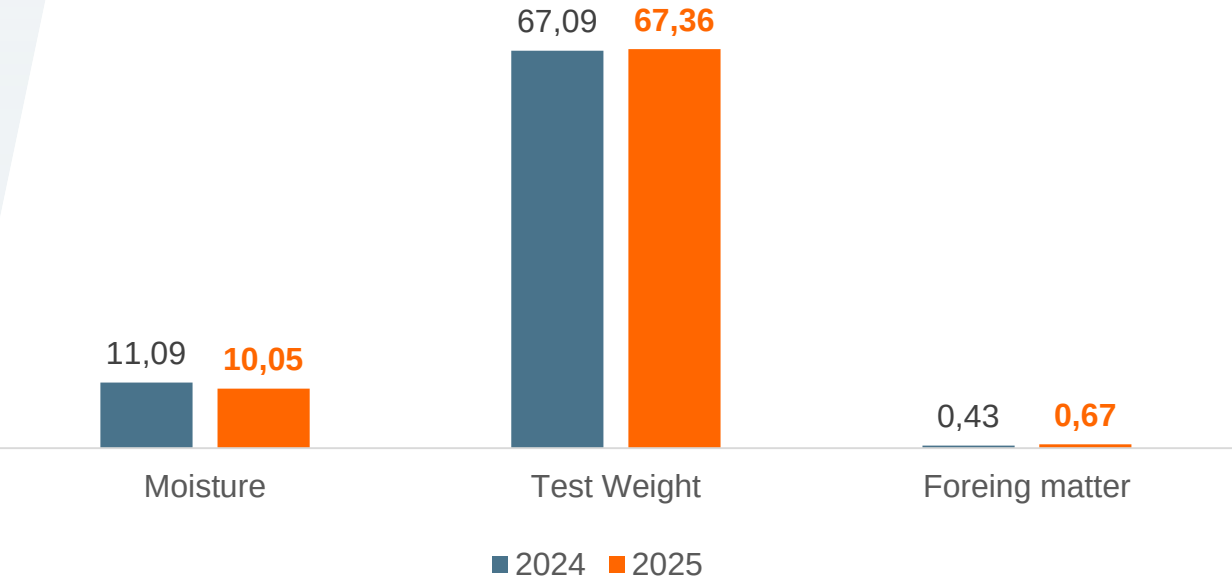
2025

Distribution per protein level, wheat crop 2025 Bulgaria



Crops 2024 & 2025 quality,barley Bulgaria

Parameter	Avg	Min	Max
Moisture	10.05	8.99	11.35
Test weight	67.36	65.3	68.6
Foreign matter	0.67	0.11	0.92



Crops 2024 & 2025 quality, wheat 13% Baltics

PARAMETER (AS PER EN, ISO) / 523 samples tested	Avg. 2024	Avg. 2025	Min. 2025	Max. 2025
Protein on dry matter,	13.2	13.1	12.8	13.5
Moisture, %	13.9	14.0	13.2	14.3
Test Weight, kg/hl	77.8	77.1	75.8	78.5
Foreign matter, %	1.2	0.8	0.4	1.1
Bug damaged, %	0.2	0.15	0.1	0.2
Falling numbers, sec.	320	270	250	340
Wet Gluten (ISO 21415-2), %	26.1	26.4	25.4	27.2

Observations: increased % of fusarium damaged grains ~ 0.2-0.45; Test weight is lower vs 2024; protein is on the same level vs 2024

Crops 2024 & 2025 quality, wheat 12.5% Baltics

PARAMETER (AS PER EN, ISO) / 778 samples tested	Avg. 2024	Avg. 2025	Min. 2025	Max. 2025
Protein on dry matter,	12.6	12.7	12.3	12.9
Moisture, %	13.9	13.9	13.2	14.2
Test Weight, kg/hl	77.6	76.7	75.4	77.8
Foreign matter, %	0.6	0.7	0.4	0.9
Bug damaged, %	0.2	0.2	0.1	0.45
Falling numbers, sec.	310	260	240	305
Wet Gluten (ISO 21415-2), %	25.1	25.0	24.0	26.8
Broken / Shrunken, %	1.5	1.6	0.8	1.9
W, %	254	250	170	260
P/L.	0.52	0.5	0.42	0.82

- Test Weight is lower vs 2024,
- Falling Number is lower vs 2024 ;

Crops 2024 & 2025 quality, wheat 11.5% Baltics

PARAMETER (AS PER EN, ISO) / 372 samples tested	Avg. 2024	Avg. 2025	Min. 2025	Max. 2025
Protein on dry matter,	11.6	11.7	11.5	12.1
Moisture, %	13.5	13.3	12.7	13.7
Test Weight, kg/hl	77.8	76.4	75.2	77.2
Foreign matter, %	0.44	0.58	0.41	0.76
Bug damaged, %	0.23	0.19	0.11	0.27
Falling numbers, sec.	335	281	240	316
Wet Gluten (ISO 21415-2), %	22.3	22.5	22.0	23.0
Broken / Shrunken, %	2.11	1.30	0.65	2.54
W, %	210	209	206	212
P/L.	0.66	0.72	0.67	0.84

- Test weight is lower vs 2024.

Crops 2024 & 2025 quality, rapeseeds Baltics

PARAMETER (AS PER ISO) / 320 samples tested	Avg. 2024	Avg. 2025	Min. 2025	Max. 2025
Moisture, %	7.8	8.0	7.3	8.8
Oil content as is, %	43	44.0	42.5	45.5
Impurities (Admixture), %	1.7	1.40	0.3	2.8
FFA, %	0.8	0.8	0.4	2.4
Glucosinolates, µmol/g	<25	<25	<25	<25

Observations: Oil content of rapeseeds crop 2025 is higher than in crop 2024. Let's look at changing these parameters with the arrival of new samples;

Crops 2024 & 2025 quality, barley Baltics

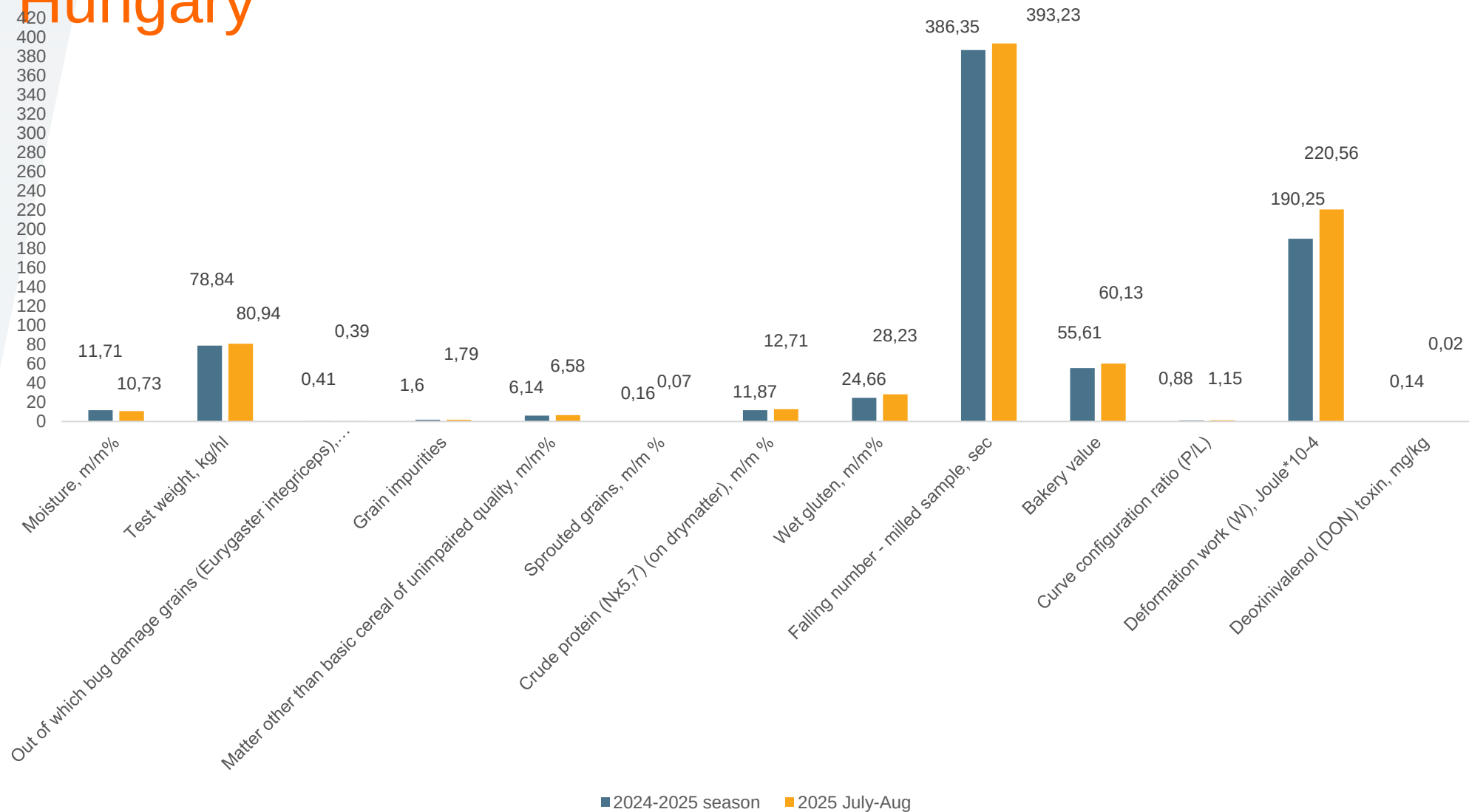
PARAMETER (AS PER EN, ISO) / 400 samples tested	Avg. 2024	Avg. 2025	Min. 2025	Max. 2025
Moisture, %	13.0	13.2	11.0	14.6
Test Weight, kg/hl	67.0	63.0	55.8	68.3
Foreign matter, %	1.1	0.8	0.4	1.4
Other cereals, %	1.8	1.8	0.3	4.91

- Test Weight & Foreign matter is lower vs 2024,
- Moisture is a slightly higher vs 2024.

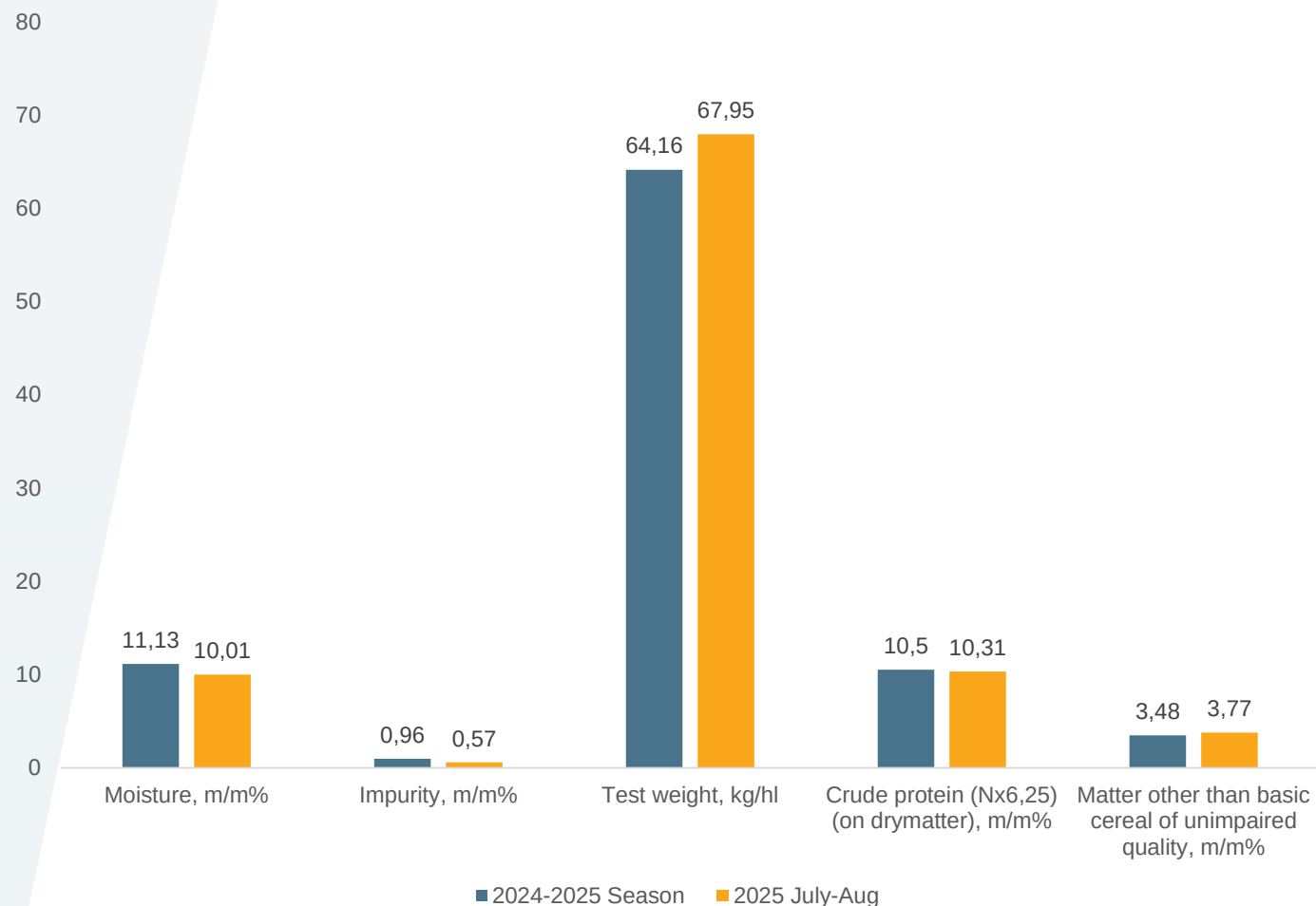
Crops 2025 quality, wheat Hungary

PARAMETER / 900 samples tested	Avg. 2025	Min. 2025	Max. 2025
Test Weight, kg/hl	80,94	77,7	85,5
Bug damage grains, %	0,39	0,03	3,21
Grain impurities, %	1,79	0,04	26,66
Moisture, %	10,73	7,72	13,48
Protein on dry matter, %	12,71	8,74	18,7
Wet Gluten (ISO 21415-2), %	28,23	11,05	42,5
Sprouted grains, %	0,07	0,00	3,52
W, 10 -4 J	220,56	68	487

Crops 2024 & 2025 new season quality, wheat Hungary



Crops 2024-2025 & 2025 new season quality, barley Hungary





Good surprises / FRANCE

- The harvest is returning to its normal level compared to previous years but not exceeding it despite the increase in yields.
- Estimated soft wheat harvest for 2025, based on a field survey, is around 32 million tons.
- Estimated quality "up to standard" with protein rates meeting standards and often above 11%. Very good PS and a low moisture content are all assets to attracting international buyers in a market where competition is expected to be fierce.

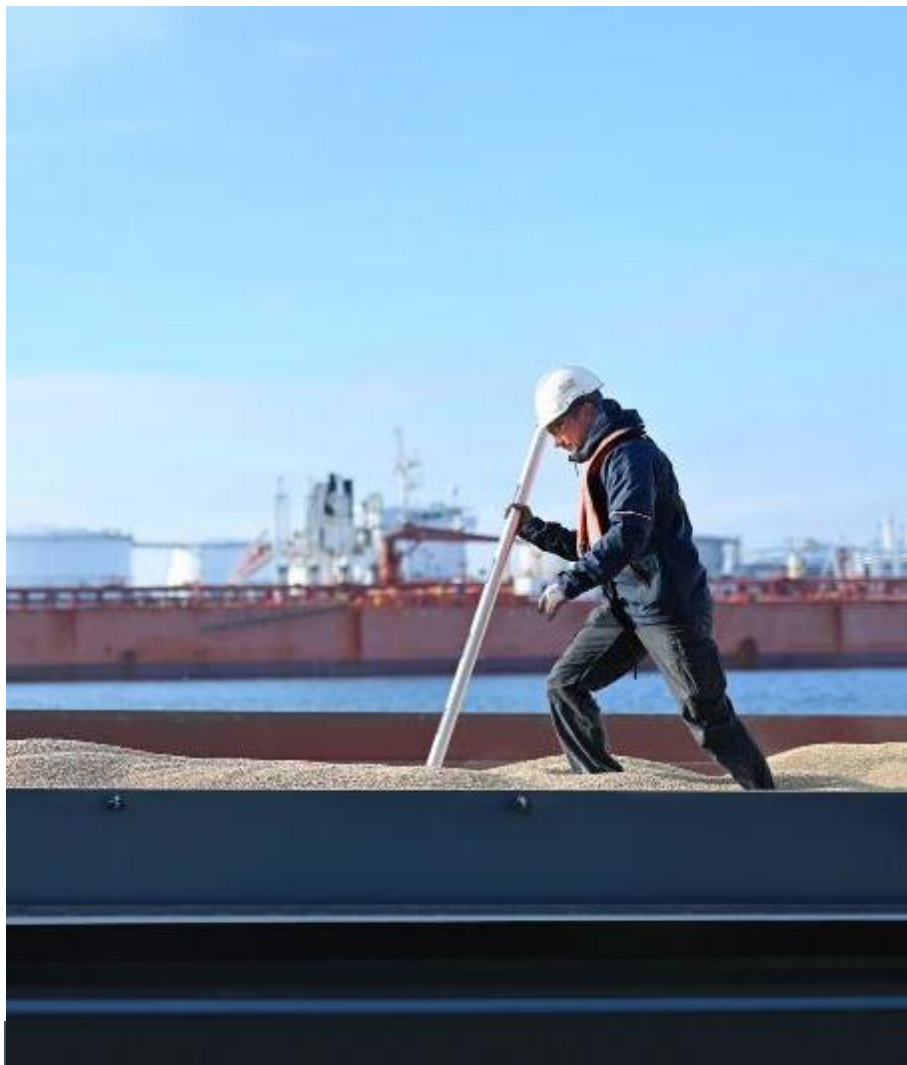
Quality data, wheat / FRANCE

PARAMETER (AS PER EN, ISO)	Avg. 2024	Avg. 2025 *	Min. 2025 *	Max. 2025*
Test Weight, kg/hl	76.0	79.0	78.1	80.6
Moisture, %	13.6	12.8	11.6	13.9
Protein on dry matter, %	11.4	11.3	10.9	12.1
Analyse W 10 -4 J	190	188	169	197
P/L	0,83	0,95	0,80	0,99
Falling number, sec	240	333	281	368

Breadmaking parameters :

- We see until now that average protein keeping around 11,3% for the time being based in comparison with previous year crop 2024;
- Test weight and Moisture are better that what we have seen from previous year crop 2024;

* Information based from SGS Multilab new crop up to date 15/09/2025



Thank you!

Do you have any questions?

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When you need to be sure