



agaSAAT GmbH · Kelvinstraße 2 · D-47506 Neukirchen-Vluyn

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Natürlich und gesund genießen.

agaSAAT® Market Report May 2024

Dear Readers,

When it rains, it pours – this well-known proverb has proven true once again this April. Persistent rain has delayed sowing in many parts of Germany, in Austria the majority of the pumpkin seeds that had already been sown have sunk, and in the Czech Republic the freshly sown summer poppy seeds have had to deal with overnight frosts and temperatures as low as -7°C. It looks like we are in for an exciting few months ahead – we will keep you up-to-date with all the latest news!

Pumpkin seeds

The market situation remains tense. Available quantities are in the hands of speculators and are being held back. Sales are only happening in the market at known, set prices. In addition, there is a lot of speculation around increasing sea freight prices. Developments in the Middle East will play an important role here. If crude oil prices rise, shipping companies will immediately incorporate these increases into their sea freight prices. Current shipping times are still around 50 – 70 days and this must be taken into account in your planning. When goods are transported through different climates it can often cause their moisture levels to rise, so be aware of this when securing your goods.

GWS-quality seeds

The market is almost completely sold out – and this has had a direct impact on prices. Current prices are significantly above the average of previous years. Despite all this, we still recommend securing your long-term requirements as quickly as possible.

Organic pumpkin seeds

GWS A / AA seeds – Due to the significantly limited availabilities, an all-time high in terms of price has been reached. The difference in price between imports and seeds grown in Germany is becoming increasingly smaller. We recommend switching to locally grown seeds. By doing so, you will be investing in your local agricultural sector and switching to an alternative supply chain with a significantly smaller carbon footprint. We will be happy to help you here.

Shine Skin A / AA – Availabilities here are also limited and preparations are underway for the new sowing season. We recommend promptly securing your requirements to ensure that you have a supply of goods until the new harvest comes in.

Cultivation in the Lower Rhine: Planting instead of sowing – Due to persistent rainfall and waterlogging in the fields, sowing is not an option for now. As such, this year we decided to **plant instead of sow**. Seedlings are started in greenhouses before being planted in the ground. This means that we can leave the ground to dry out enough to start the new season under the best possible conditions.





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Blue poppy

Persistent rainfall and waterlogging are posing problems for winter poppy cultivation. Large swathes of the growing areas in Germany are simply still too wet to be planted. In the Czech Republic, summer poppy sowing started at the beginning of April but forecasts were weakened by overnight frosts where temperatures dropped as low as -10°C. Just how well the summer poppy has coped with these cold temperatures in the early stages of growth remains to be seen. In just a few weeks, we will be heading out on our first tour of the growing areas to get a better idea of what the situation is.

Organic poppies – Available quantities from European farms are rare and prices are significantly higher than those for non-EU goods. It is almost time to start the new harvest in Turkey, however it is still too early to say what the quality of the goods will be like. We are waiting to get our hands on a sample so that we can tell you more.

NATURLAND-certified goods from non-EU farms are now coming in, so please let us know if you still have requirements that need covering.

agaBLUE® – Another way to enjoy our classic seeds. A tasty treat that will melt in your mouth.

Kugelhofp with agaDAMPFMOHN®

You will need: 200g butter, 200g icing sugar, 8 eggs (separate the yolks and the whites), 230g flour, $\frac{3}{4}$ of a sachet of baking powder, 150g sugar, 1 packet (200g) of **agaDAMPFMOHN®**

Method: Whisk the egg whites into stiff peaks and beat together the butter, sugar, icing sugar and egg yolks in another bowl until fluffy. Stir the flour and butter into this mixture and then gently fold in the egg whites. Put 2/3 of the mixture in a cake mould and then add **agaDAMPFMOHN®** to the remaining 1/3 of the mixture. Add the poppy seed mixture to the cake mould and marble carefully with a fork. Bake for around 55 minutes at 165°C. **Enjoy!!**

Sesame seeds

Supply from growing areas continues to be slow in arriving. Due to the modified transportation routes, import times for sesame seeds are significantly longer and prices for sea freight are continuing to increase. Raw material prices are fixed but are being driven up higher due to the increases in freight and crude oil prices. We still urge caution with regards to chlorate residues in sesame seeds. Please bear this in mind when securing your future requirements.

Hulled organic sesame: Due to reduced sourcing options and limited availability, the market situation remains tense. We expect to see the situation ease up when the new harvest from Pakistan comes in at the end of the year at the earliest. No organic sesame seeds can be exported from India as a result of the ongoing ETO issue.

ORGANIC NATURLAND SESAME: The last remaining harvested quantities from the winter harvest in UGANDA are being prepared and should be shipped from Mombasa to Hamburg in the coming weeks. It will still be a few weeks until we receive the goods. However, our warehouse is stocked and we still have a few limited quantities available. Demand for NATURLAND goods is not letting up. Current demand is outstripping available quantities. This is impacting further price developments, so we advise urgently covering your requirements.





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Linseed

The EU Commission has still not made a binding statement with regards to import duties. On top of this, current flooding in Kazakhstan is affecting the supply of goods. Some warehouses have been flooded and stored goods from the last harvest have fallen victim to the floodwaters. Even some packaged goods have drawn in moisture due to poor storage conditions and persistent rainfall. Exercise caution when securing your goods.

The sowing of our own **agaSUZANNE®** and **agaGOLDFLAX®** on farms in Germany, Hungary and the Netherlands is finished. In some areas, the heavy rainfall at the start of April caused the ground to get very muddy. We are now checking these areas to see whether reseeded is needed to secure the harvest yields. It still remains to be seen how exactly the situation will progress until it is time to harvest. We will keep you up to date with the latest growth developments in the fields over the coming weeks.

NEW to our range: agaSUZANNE – Linseed from controlled organic farms

– Available from the 2024 harvest – agaSAAT was able to secure growing areas in the Danube Delta in Romania. In addition to cultivating **agaGOLDFLAX®**, this season we will also cultivate **agaSUZANNE®** here.

Sunflower seeds

Availability and stocks from the last harvest are decreasing week by week. An increase in cooking oil prices is influencing further price developments. Farmers are speculating on higher producer prices and so are holding quantities back. There is currently no clear information available about the cultivation areas for the new season. Should you still have requirements that need covering for Q2 and Q3 of 2024, we advise securing them so that you have supplies up until the new harvest comes in.

Hulling plants will stop production in a few weeks to start preparing for the new season. Please take this into account in your planning!

Organic sunflower seeds: Available quantities are very limited in the organic market. Due to the poor yields and results from hulling plants, some providers have already withdrawn offers. We recommend that you secure any open requirements as a matter of URGENCY! We recommend exercising caution with regards to the purity and quality of the available goods. Finding foreign matter and impurities in these goods is a common occurrence. The situation is even more complicated with NATURLAND goods. No quantities are offered at the moment – you will have to wait until the new harvest comes in but cultivation areas and availabilities are very limited. The amount of contract growing areas is similar to last year but rapidly increasingly demand cannot currently be met by food retailers and processors. You absolutely must take this into account during your future planning!





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Organic nigella / black cumin: The new harvest is underway! However it will be a few weeks before the goods are prepared and available on the European market! We expect the first quantities from the 2024 harvest to be available in Europe at the end of June / start of July. The first indications are that prices for the new harvest are significantly higher than last year.

agaSAAT Food Safety – Natural stock protection

With rising temperatures, the number of food storage pests is set to rise too. The importation of goods from origin and the related carryover of pests is a major source of concern for stockists and production companies as pests can quickly spread from one product to others stored nearby. This can lead to significant damage to goods, and in a worst-case scenario damage to companies' images. On top of the additional costs involved in treating storage and production sites, significant costs can also arise if products have to be recalled.

With seeds and spices, and with both organic and conventional goods, experience has shown that a rise in temperatures also means a rise in insect infestations. The preventative measures taken at origin mostly only take care of living food pests and do not get rid of egg deposits in the raw materials.

The pest eggs use the time that it takes for the goods to be imported to develop and hatch. Once the goods arrive at the ports of entry, you then once again have to deal with a living pest infestation.

Often these infestations are only detected in imported goods during intensive checks. If you only notice an infestation once the goods have been stored in your warehouse, it is best to assume that the infestation has also spread to products stored nearby.

To prevent this, in addition to a thorough import inspection we also offer preventative treatments with natural **carbonic acid, a preventative treatment that is authorised for use on organic goods.**

We can also keep the necessary storage capacities for your goods in line with IFS-FOOD standards (temperature and humidity (climate-neutral)) ready for you. In our new, fully air-conditioned logistics site, we can store goods in the best-possible conditions until you are ready to use and process them further.





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agaSAAT FOOD SAFETY Program

Are you familiar with the benefits of our agaSAAT FOOD SAFETY program?

Seeds and spices are agricultural raw ingredients that become food – and therefore “credence products” – after preparation.

When temperatures rise, so does the risk of a pest infestation.

This is precisely where the agaSAAT FOOD SAFETY program comes in. It offers a comprehensive, all-inclusive package of services along with the **know-how** we have gathered from 30 years’ experience in our core areas of expertise. Our services are just as flexible as your requirements!

- Storage of goods in separate **quarantine storage units**
- Pressurised disinfection **using natural carbonic acid (which can also be used on organic products)** in the high-pressure chambers installed at our Neukirchen-Vluyn site
- **agaSAAT fine cleaning** (can be done with a colour sorter and NIR technology if required) at our high-tech cleaning facilities
- Packaging in sacks and big bags, loading onto pallets, labelling as per customer specifications
- Storage and stockpiling under temperature- and humidity-controlled IFS-FOOD conditions, carbon-neutral warehousing

We can take care of all the necessary process steps for you. We are the only company in Germany that can offer these services and this expertise!

We are happy to offer our skills and know-how as a service to your company. We look forward to receiving your enquiry.

You can find more detailed information about the agaSAAT FOOD SAFETY Program on our website:

<https://www.agasaat.de/en/>

If you have any questions about this market report or would like to request a tailored quote, please call us on +49 (0)2845-91460.

