



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

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agaSAAT® Market Report

Dear Readers,

The escalated prices for energy and raw materials, and uncertainty in the market continue to drag on. Spring sowing is largely finished. How the market will evolve by harvest time in late summer/autumn 2022 remains to be seen. Various factors are at play, over which we have no influence. The future effect of the continuing situation in Ukraine also remains to be seen. The current EUR/USD exchange rate is 1.0559. The downward trend of the past few weeks continues. Overall exchange rate changes are also having a direct impact on price trends on the import market. When the downward trend will be reversed and the EUR exchange rate will return to an upward trend remains to be seen.

Blue poppy

When directly compared to other cereal varieties, prices for blue poppy have only slightly increased. Nevertheless, the availability of goods from the 2021 harvest, which have been stored in good conditions, is scarce. The prices indicated for the new harvest are wide-ranging, with no deals yet being made.

Even for our own crops of **agaBLUE®**, the area we were able to take under contract is much less than in previous years. In this case, the level of supply will turn out to be much lower.

Pumpkin seed

Compared to previous weeks, the producer prices have risen once again. Increased demand from the USA is stimulating the market.

The demand situation on the domestic market, however, is a different story. Requirements are only being secured in the short term due to the unstable market situation. We recommend urgently covering your requirements until autumn 2022! The COVID situation in China and the LOCKDOWN that has been declared in ports such as Shanghai are having a direct impact on lead times and freight prices.

Locally grown product is a good, sustainable alternative – our fields are ready for the 2022 sowing season! We would be happy to provide a quote for our pumpkin seeds grown in the Lower Rhine region.



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Linseed

The import situation for linseed is becoming increasingly difficult. The ongoing war in Ukraine and sanctions taken against Russia are continuing to have a ripple effect.

The transport route for goods from Kazakhstan is interrupted – Russian lorries are no longer permitted to cross the EU border and are being turned away. This means that goods from KZ are unable to be transported directly to their destination markets in Europe. Trucks have to transfer their loads at the border in order to continue the route into the EU. This increases the transport price many times over, not least because of the rise in fuel prices.

Chia

The market situation and availability remains tense – the market is not likely to ease until the new harvest from South America in September/October. It will be weeks or even months before the goods are physically available on the EU market. As such, we recommend securing your required quantities without delay. The overall market demand remains and prices continue to increase.

Sesame hulled/natural

The prices for African sesame are firm. Nevertheless, there are significantly longer lead times for shipments from Africa. Short-term requests can only be fulfilled from available stocks in Europe. In some African regions, they are already expecting significantly lower yields due to the poor weather conditions.

Quoted prices from India are much lower than those quoted for African goods, however, the acceptance for Indian sesame is still lacking since the widespread ETO scandal. Indian farmers are hoping to receive a quantity premium for the KOREAN tenders currently on offer to generate sales for their available quantities.

Sunflower seeds

The market has stabilised for now – producer prices have passed their peak and are now stagnating at a very high price point. The market is repeatedly being undermined by trading positions that are introduced to the market to generate turnover.

How the supply situation evolves remains to be seen. For the new season, there will be significantly less sunflower seed available than usual. Although the area cultivated in countries such as Hungary is much larger than in previous years, it will not compensate for the missing acreage in Ukraine.

ORGANIC Sunflower seeds

Certified ORGANIC seeds are still in scarce supply. There is no easing of the overall market situation whatsoever in sight. We recommend that you urgently cover your requirements.



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ORGANIC goods

Imports for ORGANIC goods require a significantly longer lead time. Request processing and communication with inspection bodies in the country of origin and in Germany are taking a long time.

In addition to the various time zones, the delayed impact of COVID-19 and the understaffing of inspection authorities are all playing a role here. Please bear this in mind when planning future requirements – just-in-time deliveries are not guaranteed.

Seeds, general

The prices for cereals and seeds are reaching an unprecedented level. It is difficult to predict the scale at which these developments will continue. We will have to come to terms with the fact that the elevated seed prices will have a direct effect on the entire AGRICULTURAL sector.

Brief purchasing summary

Blue poppy: Significantly smaller cultivated areas also mean much lower levels of supply for the new harvest. This is, in contrast to the lack of export quantities in the Russian market – however, the overall price increase in the AGRICULTURAL sector will also have a direct impact on the price of poppy seed.

Pumpkin seeds: Producer prices have risen again in the last week. CHINA is grappling with LOCKDOWNS in its shipping ports. LOCALLY grown goods provide an alternative – we are happy to provide a quote for our agaSAAT pumpkin seeds grown in the Lower Rhine area!

Linseed: The overall supply and import situation is deteriorating. We recommend securing your required quantities without delay!

Sunflower seeds: The price rise seen over the past few weeks seems to have reached a peak; producer prices have firmed up. It remains to be seen how the supply and availability from the new 2022 harvest will turn out.

Sesame: Africa is predicting significantly lower yields than normal in some regions. Indian suppliers are hoping for TENDER volumes in Korea to place their available quantities in the market. There is still a lack of demand for Indian seed.

Chia: The market situation remains tense, with no change expected until at least the arrival of the 2022 harvest from South America. We recommend securing your required quantities without delay.

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