



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

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Natürlich und gesund genießen.

agaSAAT® Market Report November 2022

Dear Readers,

October has been a truly 'golden' month. The first of the winter cereals have already been sown and preparations have been made for the season ahead. In the meantime, the pumpkin seed harvest in the Lower Rhine and in other growing regions is running full steam ahead. The market is preparing for Christmas trading, which is just around the corner. Long-term estimations of future market trends are currently nigh on impossible – we're waiting with bated breath!

Blue poppy

The official cultivation and harvest figures are now available. The estimated harvest volume of approx. 20,000 tonnes in the Czech growing regions has been confirmed. This means the supply of blue poppy is much smaller than normal, which will surely have an effect on future price trends. The demand for **agaBLUE®** with guaranteed morphine contents of <4mg/kg remains very good. The available quantities of this product are also limited and prices remain at a high level. We recommend urgently securing your required quantities until Summer 2023 to ensure a reliable supply.

EU-grown **ORGANIC blue poppy** remains scarce and imported goods from Turkey have risen sharply again in price. We recommend securing your required quantities without delay!

Pumpkin seeds

Harvests in the main growing regions and shipments from Chinese ports are delayed. Many regions have been placed back under CORONAVIRUS LOCKDOWN. Sea freight rates are returning to normal, but the shipping companies are now considering reducing the number of container ships they deploy due to the drop in prices. This would lead to rising prices in the long term.

Longer import lead times must currently be factored in due to port closures. Please take note of this when planning your future requirements and secure them over the long term to maintain security of supply for this product too. The available quantities held in European warehouses are scarce and therefore in high demand.





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Pumpkin seeds, Lower Rhine

Harvesting of our own fields along the **Lower Rhine** is running at full pelt. The elaborate process of preparing and drying the pumpkin seeds is in operation around the clock. The first quantities from the 2022 harvest will be available from December in both NATURLAND-certified ORGANIC and conventionally grown quality. The demand for local and sustainably grown products continues to increase. The advantages of a secure supply chain are paramount, and buyers are impressed by the overall quality of the goods. We will happily send you some detailed information so that you can introduce an element of regionality into your supply chain.

Linseed

Future trends on the linseed market remain just as unclear as ever. Initial estimates for the ongoing harvest in Kazakhstan have been confirmed – the yields are average. The amendments to the EU regulation on hydrogen cyanide that come into force on 01/01/2023 represent a new hurdle. This is a naturally occurring ingredient that cannot be influenced in the field. In particular, the guide values of <150mg/kg for end consumer packaging are impossible to guarantee with any certainty. A targeted **selection of batches and varieties** is required to guarantee these requirements. Our own **agaSUZANNE®** variety is a safe alternative – we would be happy to provide you with a quote. The first quantities of **agaGOLDSTERN®** from the 2022 harvest in the EU have arrived. Preparation work in the agaSAAT – FOODSAFETY cleaning facility is running full steam ahead. The demand from guaranteed EU growers continues to increase. Every year, more and more customers are impressed by the quality of this product and its guaranteed traceability right back to our farmers. Secure your requirements as quickly as possible before the available quantities get snapped up!

Sesame, hulled/natural

The persistent rainfall in Africa's northern growing regions is having a stronger impact on the harvest than originally anticipated. Natural sesame seed from African growers is especially difficult to get hold of. This opens up opportunities for alternative sources. However, the advertised prices for these goods are significantly higher than those expected on the EU market.

Imports of hulled sesame are subject to extreme delays due to the more extensive import checks in EU ports. Waiting times of up to 3 weeks are the norm in EU ports because the authorities cannot cope with the current workload. Please check your requirements without delay and secure your required quantities until Q2 2023 to ensure certainty in planning.

Chia

The market is currently dealing with extreme price fluctuations. Shipments of the new harvest from South America are delayed because the containers cannot be transferred to the shipping ports due to persistent drought and low tides. SPOT market prices are significantly higher than those being offered by growers for shipment. According to current estimates, the arrivals from South America are not expected in European ports before the end of December. If you have any short-term requirements, we recommend urgently securing the quantities you need to guarantee supply.



Sunflower seeds

We are expecting the price of sunflower seeds to increase at the beginning of next year, if not before. The market is currently very stable due to the large volumes of raw materials being exported from Ukraine. But how long will this continue? Goods cannot be exported from Ukraine via the usual sea routes, and the capacity for road and rail freight is extremely limited. There are goods remaining from the 2021 harvest, but they are no longer suitable for use in the FOOD sector due to the uncontrollable storage conditions in Ukraine. We urge caution here – quality clearly goes before price!

ORGANIC sunflower seeds

The market remains uncertain. We are still awaiting a firm statement on the availability of goods from the new harvest. Quantities from alternative sources such as Hungary are extremely limited and are priced much higher than the market level for Bulgarian goods.

ORGANIC market, general

Sales on the ORGANIC market are in decline for the first time in many years. End consumers are no longer prepared to pay the higher prices and are switching to conventional goods grown locally and sustainably.

Brief purchasing summary

Blue poppy: Goods are available in much smaller quantities than in ‘normal’ years, but the demand is also in decline. The market needs to find its feet again. The demand for high-quality goods with guaranteed morphine values remains high.

Pumpkin seeds: The restrained interest from buyers and lack of long-term hedging are now turning around and causing sharp increases in SPOT market prices. We recommend URGENTLY covering your requirements through into Q1 2023.

Linseed: The market is currently stable. The amendments to the maximum levels of hydrogen cyanide in end consumer goods will bring new challenges from 01/01/2023. These guide values can only be guaranteed by means of targeted batch selection and separation. Please be aware of this when planning and securing your future requirements.

Sunflower seeds: We are expecting a price increase at the beginning of the new year. Please secure your requirements on time.

Sesame: Import delays and global market prices that are significantly higher than those on the EU market are making it difficult to import goods. Please plan for the long term and secure your requirements through into Q1 2023.

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



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agaSAAT FOOD SAFETY programme

Are you aware of the benefits of our agaSAAT – FOOD SAFETY – programme?

Seeds such as sunflower, linseed and pumpkin are agricultural raw ingredients that become food – and therefore ‘credence products’ – after preparation.

This summer and autumn have been very warm and wet, which has led to the goods becoming heavily infested with all kinds of insects.

This is where the agaSAAT – FOOD SAFETY – programme comes in, especially this year. It offers you a comprehensive, all-inclusive package along with the **KNOW-HOW** we have gathered from 30 years’ experience in our core areas of expertise:

- Storing goods in separate **quarantine storage units**
- Pressurised disinfestation **using natural CO²** in the high-pressure chambers (**also licensed for ORGANIC products**) installed at our Neukirchen-Vluyn site
- **agaSAAT fine cleaning** (including colour-sorting on request) at our high-tech cleaning facilities
- Packaging in sacks and big bags, loading onto pallets, labelling to customer specifications

We are happy to offer our capabilities and expertise as a service to your company. We look forward to receiving your enquiry.

More detailed information on the agaSAAT FOOD SAFETY – programme is available at:

www.agasaat.de

Or please feel free to call us on +49 (0)2845-91460

