

agaSAAT® Market Report September 2025

Dear Readers,

How time flies! Autumn is approaching, heralding the busiest time of the year. The first harvest reports have been published and confirm a fairly good harvest for staple cereal crops – which, however, is affecting prices.

The same cannot be said for specialty crops. Some seeds are presenting significant problems in terms of further planning and processing; we need to be especially cautious when it comes to chia and sunflower seeds.

Pumpkin seeds

Prices at origin are stabilising with the approach of the new harvest. Due to the significantly smaller area available for cultivation and therefore lower yields, the surplus quantities from the old harvest do not pose any major problems.

The situation with **GWS A & AA grades** continues to require critical attention. The expected yield will fall far short of meeting demand. Please consider locally-grown alternatives. These goods are in any case of higher quality and worth the extra cost of domestic cultivation.

Organic pumpkin seeds

We will have to wait for this year's harvest for new quantities. Until then, the European market will have to obtain supplies from secondary sources or position stocks held by EU stockists. Whether this will be enough remains to be seen. Harvesting has already begun in some regions in Austria. However, there is no hard and fast information on yields and qualities. All in all, we anticipate a rather average harvest.

No new prices are currently listed for goods imported from China either. Due to strict EU requirements, the qualities of the new harvest will first be checked for conformity at origin before any initial offers for the new harvest are made. The first imported quantities are not expected to be physically available on the market until the end of Q4/start of Q1 2026.

Demand for **NATURLAND association goods** is not letting up.

The plants growing in local cultivation areas are coming along nicely and crops are looking good. It will still be a few weeks before the first quantities are available. We strongly recommend that you cover any long-term requirements with contract cultivation. The available areas and expected harvest quantities will definitely not be enough to satisfy the increased demand for association goods.

Blue poppy

The delayed harvest of summer poppy fields in Czechia is now almost over. The yields are average and the first quality assessment analyses are under way. Frequent interruptions caused by rainfall mean that much of the harvest needs to be dried at great expense before storage. This is driving up costs. The extent to which these costs will have a negative impact on further market developments remains to be seen. At present, the market is fixed with no drop in prices in sight.

agaBLUE®: The contract-grown harvest in Germany is now over and yields are as predicted. The first quantities of **agaBLUE®** from this year's harvest are already available and are of the same high quality we have come to expect. Long-term contract cultivation means that prices are considerably higher and are not subject to general fluctuations in the SPOT market.

Harvesting of the summer sowings in the Netherlands and France is under way. We now have to wait and see if the harvested yields and qualities turn out as expected.

Organic poppy

NATURLAND-certified organic blue poppy is now arriving and the first containers were shipped as planned.

Local fields have been harvested and the harvest data has been sent for analysis.

Sesame seed

Despite the imminent harvest in India and Africa, the market remains stable, contrary to expectations. Global demand and import tenders have strengthened the market. Most of the quantities available from the summer harvest in Pakistan are under contract. Delays in shipping and import checks continue to pose problems. Other importers might not take the costs incurred here into account in their public offers and pricing, only mentioning them in the 'small print', but they should not be overlooked.

NATURLAND sesame: The initial analyses are available and the goods are now being processed.

However, exports are experiencing delays because regular exports cannot take place (limited availability of ships). The first ships are not scheduled to set sail for Europe until at least the end of the month – lead times of 6-8 weeks mean physical availability from the end of November.

We recommend that you cover any long-term requirements urgently.

Harvesting is imminent in other growing regions in Africa. However, it is still too early to make any initial predictions. The growers cannot give us any information on yields and qualities just yet.

Linseed

Initial cautious predictions and estimates suggest that we can expect a fairly good harvest from Kazakhstan. However, that is still some way off and a lot can happen in the meantime.

Further developments and influences caused by the ongoing Ukraine-Russia war and the associated sanctions continue to affect the market.

The initial analyses of our own varieties, **agaSUZANNE®** and **agaGOLDFLAX®**, are now available and the goods are ready for the final processing stages. We expect to start the final processing/fine cleaning in the coming weeks. We look forward to sending you an updated quote.

Organic linseed is following the trend seen in conventional goods. We do not have any detailed information and offers for the new 2025 harvest just yet. Linseed grown in the EU, such as in Italy, Romania, Flanders or Germany, is a reliable and sustainable alternative to securing your required quantities from the usual sources in Eastern Europe.

Sunflower seeds

Harvest forecasts have just been revised downwards again and all existing offers from the hulling plants have been withdrawn. How the market will develop is entirely unclear. The situation is comparable to last year's harvest. This ultimately means low yields, small kernels, high hulling losses and therefore rising prices. It remains to be seen how many signed contracts will be fulfilled and delivered on the terms agreed. Experience from the past 12 months has shown that a contract that exists at origin no longer guarantees that requirements will be secured.

Organic sunflower seeds

The situation is the same as for conventional seeds. Here too, forecasts have been revised downwards again. Prices continue to rise – many suppliers are holding off making offers due to the situation in the fields and the uncertainty regarding yields.

The situation for NATURLAND-certified organic goods also remains very fraught. There is no end to the demand from food retailers. If you require NATURLAND-certified raw materials, please contact us right away – there is still some time before sowing starts, although most of the cultivation areas have already been reserved.

Chia

The next major project. Due to the poor weather conditions and smaller harvest, South America is unable to fulfil any contracts without price adjustments. The market is empty and the whole of Europe is awaiting the arrival of the first shipments of the new harvest.

The situation with **organic chia** is even worse. Every day, the market is witnessing record prices to secure the requirements needed to continue production – and yet there are no goods. When and under what conditions the signed contracts will be fulfilled remains to be seen.

We are also waiting for contractual details and information so that we can respond to existing enquiries.



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

BACK_ GEWÜRZ_ SAATEN_

Natürlich und gesund genießen.

Nigella / Black cumin

The situation at origin has not eased up. Drought and political uncertainty persist. If you still have requirements you should act as soon as possible. We are expecting a considerable shortfall. Alternatively, source countries such as Egypt are getting ready for the new harvest. However, prices will be much higher.

Organic goods from Egypt are about to be harvested. However, it will be a few more weeks until we can assess the quality of the new 2025 harvest. Prices have risen further compared to last month. Please get in touch if you have any short-term requirements that need covering.

**NEU AB HERBST 2025:
NEUE KOMBINIERT
REINIGUNGS-/MISCHLINIE**

**Mit KI-gestützter Fremdkörper-
erkennung im X-RAY/Opticalsorter
Combogerät.**

www.agasaat.de

SINCE
30
YEARS
*Customized core
competence.*



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

BACK_
GEWÜRZ_
SAATEN_

Natürlich und gesund genießen.

agaSAAT FOOD SAFETY PROGRAM

Populations of pests are booming and requests for the reprocessing of seeds and spices are coming in thick and fast. The inventory protection and quality assurance of the raw materials used is becoming increasingly important when it comes to seeds, spices, and nuts.

Even for goods meant for direct consumption (muesli) or sold in small packaging, we recommend preparing the goods used properly.

Luckily, we have a gentle and sustainable solution for your infestation problems.

Read on to find out more about the advantages 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 disinfestation **using natural carbonic acid** (which can also be used on organic products) at our Neukirchen-Vluyn site
- **agaSAAT fine cleaning** (which can be done with a colour sorter and NIR technology if required) based on SORTEX processes 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 offers 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.

Customized core competence – this is what agaSAAT GmbH stands for

The services that we offer includes the mixing and packaging of **ready-to-use** seed mixes for further processing. You specify the number of ingredients and the recipes, and we mix and package the seeds according to your specifications – making your job easier.

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.

www.agasaat.de

SINCE
30
YEARS
*Customized core
competence.*