

agaSAAT® Market Report October 2025

Dear Readers,

As we approach the end of 2025, planning and preparations for stocktaking, year-end reports and the start of the new year are in full swing. How will the last quarter pan out? What surprises does the rest of the year hold in store for us? Perhaps if we could predict the future, some decisions might be easier! Our aim is to keep you as up-to-date as possible about topics, trends and developments in our core business, and we hope that this will be helpful for your future planning.

Pumpkin seeds

The harvest in China is in full swing. Scaled back cultivation areas in China will restrict availability in the market. The surplus from last year's bumper harvest will bridge the gap in supply. We anticipate a significantly more stable market and rising prices in the long term and advise securing your requirements up to the end of Q2 2026.

The situation with **GWS A & AA grades** continues to require critical attention. There is no surplus from the last harvest. The expected yield will fall far short of meeting global demand. What's more, maximum residue levels mean that batches selected for the European export market will be restricted.

Organic pumpkin seeds

We will have to wait for this year's harvest for new quantities of Shine Skin. Until then, the European market will have to obtain supplies from secondary sources or position stocks held by EU stockists. No new prices are currently listed for goods imported from China. 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 expected to be physically available on the market in late Q4/early Q1 2026.

On the whole, we expect a rather average harvest from local EU growers. The weather conditions over the past week have been favourable for harvesting. Let's hope these conditions prevail well into late October.

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

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 processing plants are operating at full capacity and will continue to do so until the end of the year. Processors' warehouses are gradually filling up. Prices are relatively stable and not fluctuating much. There is no price drop in sight. Once again, exports are rising sharply towards the end of the year due to seasonal factors. Given the workload of the cleaning plants, this could lead to a temporary market shortage and price increases.

agaBLUE®: 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 the general fluctuations in the SPOT market.

The summer varieties have now all been harvested as well and the quality looks excellent. Thanks to our long-standing partnerships with local farmers, we are able to offer you top-quality, sustainable agri-products.

Organic poppy

NATURLAND-certified organic blue poppy is now available and ready for immediate call-off schedules. The locally grown harvest is still being processed and analysed. However, we expect to receive all pending results within the next few days and can then begin dispatching the goods in a timely manner.

Sesame seed

The markets are boosted by global demand and particularly the rise in exports from various points of origin to China. Prices have bottomed out, even though active demand within the EU markets remains somewhat subdued. At present, prices are rising steadily; the latest import figures show that the market is not particularly well stocked. You should therefore plan cautiously and ensure you are fully covered for the 1st quarter. The winter harvest arriving from Africa will then be used to generate the results for Q2 2026.

NATURLAND sesame: The first containers from the summer harvest are finally at sea! The planned shipments have been significantly delayed. The first quantities will physically arrive at EU ports at the start of November. Supply remains limited and demand remains high. The winter harvest is still a few weeks away. Act now to secure your long-term supplies.

Linseed

The border closures between Poland and Belarus a few weeks ago showed how easily the market can change. All of a sudden, the supply chain between Europe and Kazakhstan was cut off. Prices reached unprecedented highs within hours. The uncertain political situation and ongoing developments between Russia, the Ukraine and the EU will continue to play a key role in shaping the market.

With our own varieties **agaSUZANNE®** and **agaGOLDFLAX®**, we are able to offer you a reliable, local and sustainable alternative. Even though prices for EU goods are generally higher than for imported goods, the domestic market can still be competitive at peak prices and guarantees a continuous supply of top-quality goods. 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 from EU growers is also a reliable and sustainable alternative to commonly imported goods for securing your required quantities.

Sunflower seeds

The market currently appears to be stabilising somewhat and price fluctuations and speculative trading have eased off a little. Current offers are still significantly higher than last year. However, this can be attributed to current harvest predictions and the cost of hulling and processing the generally small kernels. Keep a critical eye on the market and developments but be cautious when securing planned quantities.

Organic sunflower seeds

Prices in the organic sector continue to rise. Organic seeds are not as widely available as conventional seeds.

The situation for NATURLAND-certified organic goods also remains very fraught. First quantities from the new harvest are expected at the turn of the year. 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

Thanks to the goods currently at sea, the new harvest is coming to Europe. Unfortunately, it is difficult to estimate when the goods will reach the 'mainland'. Shipments from South America are currently experiencing delays on a weekly basis. Prices for follow-up shipments from the point of origin have risen significantly. We recommend that you cover any long-term requirements urgently.

Organic chia

Every day, record prices are being offered on the market to secure the requirements needed to continue production. When and under what conditions the signed contracts will be fulfilled remains to be seen. We do not have any binding information from the point of origin.

Nigella/Black cumin

Current offers clearly reflect the drought situation and political uncertainty in the region of origin. Offers have risen considerably over the past few weeks. If you have outstanding requirements, you should act as soon as possible. We are expecting a considerable shortfall.

Organic goods from Egypt do not bode well either. Here too, prices have gone back up significantly in recent weeks. It will be a few more weeks until we can assess the quality of the new 2025 harvest. Please get in touch if you have any short-term requirements that need covering.



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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

