

agaSAAT® Market Report November 2025

Dear Readers,

How did the past few months fly by so quickly? It feels like just yesterday that the year began, yet here we are with another exciting year already behind us. We are entering the home stretch of 2025—inventory preparations are ramping up, and Christmas is just a few weeks away. Preparations for the new season are well underway. Even though the harvest has just come in, growers everywhere are getting ready for the next one. The winter crops for the new season have already been sown, and final area planning with our contract farmers for the summer crops is in full swing to ensure we are well positioned for the new year.

There is still a lot of exciting activity happening in the seed and spice industries...

Pumpkin seeds

Prices at source continue to stabilise. Lower domestic demand and the import duties imposed by the United States have not yet affected further price developments. Current market projections indicate that prices are unlikely to fall again before the start of Chinese New Year in 2026. If you still need to plan your requirements for the first half of 2026, we strongly recommend doing so as soon as possible due to ongoing supply constraints. The situation for **GWS A & AA grades** remains **critical**. The volumes available from the 2025 harvest are limited. Current quotations are priced close to last year's organic product levels. The available yield will fall far short of meeting demand.

Act promptly—we recommend securing long-term price protection through the end of the second quarter of 2026.

Organic pumpkin seeds

Due to strict EU regulations, the quality of the harvest is first verified for compliance at the point of origin. The current situation remains unchanged. Consequently, the first import shipments of the new harvest will not arrive at European ports during the 2025 calendar year. The local harvest is complete, and our yield estimates have been confirmed. Seed processing is now in full swing. The volumes available are limited—please place your orders promptly to secure the volumes you require. Demand for **NATURLAND certified organic products** from retailers remains strong. We strongly recommend securing long-term price protection through contract farming. The available areas and expected yields will definitely **not be sufficient** to satisfy the increased demand for products certified by organic farming associations. You should begin planning your 2026 requirements as early as possible to ensure that the necessary cultivation areas can be secured.

Blue poppy

Supply and demand are currently considered well balanced. Prices remain stable, with no significant decreases expected. The export market for EU-grown blue poppy continues to expand steadily, and the prices achieved abroad are helping to sustain market conditions within Europe.

agaBLUE®: Long-term contract cultivation means that prices are considerably higher and are not subject to the general fluctuations in the spot market. The quantities available are largely reserved under fixed contracts. If you still have purchasing needs, we would be pleased to review possible options for supplying our **agaBLUE®** product, backed by the same trusted level of quality.

Organic poppy seeds

Most of the NATURLAND-certified organic blue poppy volumes are already under a fixed contract. Yet, several paths and possibilities remain open and we are happy to assist you in further securing the volumes you need through price protection. Imports from Turkey continue to face severe exchange rate volatility and high inflation in the country of origin. We encourage you to get in touch promptly to secure the necessary cultivation areas for 2026 contract farming.

Sesame seeds

The African winter harvest is about to begin. Prices remain firm, supported by sustained global demand. The volumes available from Pakistan are nearly sold out. Import controls at European ports continue to cause significant delays, with additional costs that remain difficult to predict. We therefore recommend carefully assessing direct import terms, as unforeseen charges on import duties can accumulate rapidly.

NATURLAND sesame: Shipment timelines have been pushed back again. Supply remains limited and demand remains high.

The volumes available from Egypt are also completely sold out. We will therefore have to wait and observe how the situation develops. The winter harvest in Africa is still a few weeks away. Act now to secure your long-term supplies.

Linseed

The market remains stable but continues to react unpredictably to developments in the conflict between Russia and Ukraine and associated actions. We recommend closely monitoring the situation and gradually planning to secure price protection for the volumes you need.

Given the long transit times and uncertain waiting periods at EU borders, sufficient safety stocks and additional lead times should always be factored into your planning.

Our proprietary varieties, **agaSUZANNE®** and **agaGOLDFLAX®**, focused on local and sustainable cultivation, are largely under contract. If you are still interested, please contact us as soon as possible. We should also begin preparations for 2026 contract farming in good time to coordinate additional cultivation areas with our partner farmers.

Organic flaxseed is developing in line with the trend for conventional products.

We do not have any detailed information on the quality of the harvested crop and supply

volumes for the new 2025 harvest just yet.

Sunflower seeds

Over the past week, quotations from the source have risen significantly again, with the cause remaining unclear. We strongly advise ongoing close monitoring of the market and exercising appropriate caution. Again, we recommend to plan ahead—Christmas and New Year's Eve will arrive sooner than you think, making it increasingly difficult to secure the necessary freight capacity during this period.

Organic sunflower seeds

Prices in the organic segment continue to rise. Availability remains limited, and hulling plants continue to face significant losses in seed processing. We recommend long-term price protection through the end of the second quarter or beginning of the third quarter of 2025.

The situation for NATURLAND-certified organic goods also remains very fraught. The first volumes from the new harvest are on their way and should arrive shortly. If you require certified raw materials from NATURLAND, please feel free to contact us. There is still some time before sowing starts, although most of the cultivation areas have already been reserved.

Chia

Unfortunately, it is currently difficult to assess how the market will develop. Raw material quantities from the source are hard to obtain and prices continue to rise. We strongly encourage you to secure your long-term supply without delay. Expected shipments from South America continue to experience weekly delays. We recommend that you cover any long-term requirements urgently. The harvest commencing in Africa is influenced by current market quotations from South America.

Organic chia

Every day, record prices are being offered on the market to secure the requirements needed to continue production. We do not have any binding information from the point of origin.

Here, too, we recommend securing your supply promptly—even if the current market price is very high. There are currently no signs of improvement whatsoever.

Nigella/black cumin

Prices at source are reaching a new annual high. The ongoing drought and poor harvest yields are severely limiting sourcing. We recommend planned, long-term price protection, as there is no sign of the market easing in any way.

Organic goods from Egypt are facing the same difficulties. Yields and available product volumes are very limited due to the poor harvest, and prices have risen dramatically.



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

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IMPORTANT information! agaSAAT's holiday shipping and goods receipt schedule for Christmas and New Year

In preparation for Christmas and the turn of the year, we would like to inform you in advance about our opening hours and shipping times in the last weeks of the year:

CW 51/2025: Receipt of goods and shipments up to **19/12/2025 12:00 p.m.**

CW 52/2025 & CW 01/2026: orders for deliveries/pickups on **22/12/2025 & 23/12/2025** and on **29/12/2025 & 30/12/2025** must be submitted by **18/12/2025 12:00 PM**. Orders placed later than this cannot be guaranteed for on-time pickup or delivery.
The warehouse will be closed on **24/12/2025, 31/12/2025** and on **02/01/2026**.

CW 02/2026 First shipment in the new year:
Monday, 05/01/2026, starting at 10:00 a.m.

We kindly ask you to send us your requests and required volumes for the period from **CW 52/2025 to CW 02/2026** by **18/12/2025 at 12:00 p.m.**, at the latest, so that we can plan and book the required freight space in good time.

If you have any further questions, please do not hesitate to contact your agaSAAT GmbH representative at any time using the contact details provided.





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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

