



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

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agaSAAT® Market Report December 2025

Dear Readers,

The year is now coming to an end as we enter the final weeks of 2025. So it's the perfect time for a quick review of the last twelve months. We're also looking ahead and getting ready for the changes that await us at the start of the new year. Broadly speaking, we will have to contend with rising prices in the logistics and services sector. As of 1st January 2026, logistics costs will be adjusted again.

Competition to secure cultivation areas for contract farming continues to be high, and the start of the Chinese New Year festivities are not far off now... There's still a lot going on in the world of seeds and spices and we look forward to standing by your side as a reliable partner for securing your supply chain during the coming year.

Pumpkin seeds

Reducing export duties for shipping to the United States hasn't really made a noticeable difference in the market. Exports from China to the USA remain sluggish. Volumes exported to Europe are also significantly less than in recent years. Nevertheless, prices at source remain stable. Goods that meet EU import quality requirements are in short supply and are priced significantly higher than in previous years.

The situation with **GWS A & AA grades** is serious. Only very limited quantities are available from the 2025 harvest due to the significant reduction in areas available for cultivation. Current quotations are priced close to last year's organic product levels. Demand severely outweighs supply. Act promptly – we recommend securing long-term price protection through to the end of the third quarter of 2026.

Organic pumpkin seeds

The first import shipments of the new harvest will not arrive at European ports during the 2025 calendar year. Supply is limited, and the approval processes required for securing price protection are delaying shipments further. Harvesting of our locally grown seeds has now finished. 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

Prices for blue poppy seeds remain fixed, even though demand is not particularly high. Farmers in the source region have sufficient storage capacity and are awaiting further developments. Based on our experience, both demand and prices will go up again in the 1st quarter. Use this time to secure any outstanding requirements.

agaBLUE®: Most of the quantities available are already under contract – unlike standard blue poppy, demand for goods with low morphine and codeine contents remains high. 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

Only limited quantities are still available, particularly of NATURLAND® certified association goods. You should take action now. EU organic grades are constantly subject to fluctuating exchange rates. We continue to recommend securing your annual requirements as soon as possible. We are happy to assist with the transition to local cultivation – even though the winter crops have already been sown, spring 2026 sowings are still an option. Please contact us in good time.

Sesame seed

Sales in the European markets remains subdued. Compared to previous years, import statistics are significantly below average. The requisite import checks continue to significantly delay imports. This is causing prices to rise on the local SPOT market.

NATURLAND sesame: There is no end to the demand from food retailers. However, the market situation and supply from source are increasingly precarious. No scheduled quantities from the African winter harvest will be shipped. We are working hard to find an alternative supply of goods. However, the process of approving alternative sources of association goods in particular is very lengthy due to the certifications and audits required at the point of origin. We strongly encourage you to cover your annual requirements without delay.

Linseed

The market remains stable but continues to react unpredictably to developments in the conflict between Russia and Ukraine and associated actions. We recommend you continue to monitor the market closely and make step-by-step plans to secure the quantities 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. Weather conditions are also expected to cause the odd delay. Our proprietary varieties, **agaSUZANNE®** and **agaGOLDFLAX®**, focused on local cultivation, are largely under contract. If you are still interested, please contact us as soon as possible.

We will also need to discuss preparations for 2026 contract farming in good time to coordinate additional cultivation areas with our partner farmers. Organic linseed is developing in line with the trend for conventional products.

Sunflower seeds

Prices remain stable. Nevertheless, there are big differences between the different source suppliers. Continue to plan with caution and factor in ongoing transport delays. In December and January, it will become very difficult to organise for deliveries before Christmas. Be sure to cover your requirements and increase your stocks.

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 to the end of the second quarter/start of the third quarter of 2025.

The situation for **NATURLAND-certified organic goods** also remains very fraught. If you require NATURLAND-certified raw materials, 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

Raw material quantities from the source regions are hard to obtain and prices continue to trend upwards. It will still be some weeks before the African harvest is available. We expect to receive the first offers for the winter harvest in the second half of January.

Organic chia

The overall market situation is significantly more strained here. Planned shipments are delayed further every day and prices continue to rise. Be cautious about interesting-sounding offers from the local market. Some unscrupulous suppliers are attempting to financially profit from goods that are not physically available.

Here, too, we recommend securing your long-term supply from reliable sources – 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.

Millet

In view of recent events, we draw your attention to the current supply situation for millet.

Prices have shot up over the past few days. The available raw material quantities are limited due to the comparatively small harvest. This will continue throughout the season until the new harvest arrives.



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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.

The team at agaSAAT GmbH wishes you and your families a Merry Christmas and a Happy New Year! We look forward to continuing our collaboration!

This year, agaSAAT GmbH is again foregoing gifts and instead donating €9,000.00 to KLARTEXT FÜR KINDER e.V. There, volunteers dedicate themselves to helping the youngest members of our society, who often lack even the most basic necessities. KLARTEXT FÜR KINDER e.V. represents a unique model of social partnership in Neukirchen-Vluyn, Moers, and the surrounding area. Here, wishes are fulfilled for socially disadvantaged children and young people that would otherwise be impossible to realize. Would you also like to actively participate in the fight against child poverty and for better care for children? Then visit the website www.klartext.fuer-kinder.de





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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

