



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

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Natürlich und gesund genießen.

agaSAAT® Market Report January 2026

Dear Readers,

we would like to wish you and your families a happy and healthy new year. May all your resolutions and wishes come true! We're excited to see what 2026 holds in store for us. Every challenge presents fresh opportunities for change and growth. Our top priority this year is to expand regional cultivation. 2025 once again highlighted just how important domestic agriculture is for a continuous and reliable supply of raw materials. Social responsibility is also at the heart of our business, as we demonstrated once again at the end of last year. Since 2021, agaSAAT GmbH has been supporting the initiative **Klartext für Kinder** in Germany under the slogan **"THE GIFT OF HELPING"**. The charity does invaluable work for children in our region.

As always, we will continue to support you as a long-term and reliable partner with over 30 years of experience and will keep you updated with all the latest developments. We very much look forward to continuing our collaboration in the year ahead.

Pumpkin seeds

Local demand in the run-up to the Chinese New Year festivities means that the market is strengthening and prices are once again rocketing. In addition, shipping companies have again announced short-term price hikes for container freight. This will also have a negative impact on future pricing.

GWS A & AA grades

Demand significantly outweighs the supply and availability at source. This is causing a drastic rise in prices. Forecasts remain unchanged – the quantities available from the 2025 harvest will not be enough to sustain demand until the new harvest arrives. To safeguard your supply of raw materials, we recommend seeking approval for locally grown produce as soon as possible.

Organic pumpkin seeds

Shipments from the 2025 harvest continue to experience delays. This is due to delays in the product analyses needed for approval and ongoing import controls at the European destination ports.

Demand for **NATURLAND association goods** is not letting up. We strongly recommend long-term hedging with contract farming. You should begin planning your 2026 requirements as early as possible to ensure that the necessary acreage can be secured.

Our farmers are already planning their cultivation areas. Please contact us as soon as possible so that we can take the requisite planned areas into account when sowing.



Blue poppy

Prices remain stable. Availability is dwindling and some growing regions have already completely sold out of their entire 2025 harvest or placed it under contract.

agaBLUE®: Only limited quantities are still available. Compared to the standard blue poppy, demand for goods with low morphine and codeine levels 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 // EU Organic and NATURLAND

Extra quantities and the range of goods available are somewhat limited. We recommend securing your annual requirements as soon as possible. We can then take any additional quantities you require into account and plan for them when the summer varieties are sown in spring 2026. Please get in touch as soon as possible so that we can secure the acreage you need.

Sesame seed

Prices remain consistent. Quantities available on the local market are estimated to be very low. Therefore, we anticipate a large increase in demand in the first few weeks of 2026. Scheduled import checks are significantly delaying the planned imports. Enormous backlogs have built up over the holiday period that will now have to be dealt with slowly but surely.

NATURLAND sesame

The market situation and supply from source countries continue to worsen. There is a shortfall in the quantities expected from the African winter harvest. We are working hard to source alternative supplies. However, for association farming in particular, the approval process 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

Imports and transit logistics for raw materials from Kazakhstan remain catastrophic. Waiting times at EU import borders have reached record levels. It has become virtually impossible to supply raw materials on time. In view of this, we recommend that you plan for the long term and ensure that your requirements until the end of Q3 are covered.

Yellow/golden linseed in particular is currently in short supply. The most recent harvest from Kazakhstan is of below average quality. The omega fatty acid contents also vary greatly from batch to batch.

Our proprietary varieties, **agaSUZANNE®** and **agaGOLDFLAX®**, offer you an alternative way to cover your requirements. 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 following the trend seen in conventional goods.

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. We anticipate significant delays in January and February in the supply of raw materials from the regions of origin. With that in mind, cover your requirements and increase your inventories.

Organic sunflower seeds

The availability of raw materials remains extremely limited. In view of this, we recommend that you plan for the long term and secure your requirements up to the end of Q3 2026. SPOT requests can currently only be fulfilled from available warehouse stock.

Nearly all of the 2025 harvest of **NATURLAND-certified organic goods** is already under contract. 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 situation remains highly fraught. Please plan for the long term to cover your requirements. The market is not expected to ease until well into the 2nd quarter of 2026 when this year's harvests from Africa and India are due to arrive.

Organic chia

The overall market situation is even more critical here. Be cautious about interesting-sounding offers from the local market. Some unscrupulous suppliers are attempting to financially profit from raw materials 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

Supply at source continues to be severely limited. The ongoing drought coupled with political uncertainty mean that the situation is not expected to ease any time soon. Be sure to plan well ahead to factor in lead times for imported goods.

Organic goods from Egypt are having to contend with the same difficulties. Available product volumes are very limited due to the poor harvest and prices have risen dramatically.



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agaSAAT FOOD SAFETY program

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

We also recommend quality assurance for goods meant for direct consumption (muesli) or sold in small packaging.

We offer a state-of-the-art gentle and sustainable solution to infestation problems. This is where the advantages of our established

agaSAAT FOOD SAFETY program come into play.

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

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

<https://www.agasaat.de/en/>

