



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

# BACK\_ GEWÜRZ\_ SAATEN\_

*Natürlich und gesund genießen.*

## agaSAAT® Market Report February 2026

**Dear Readers,**

The new year is behind us and we are looking ahead to the coming months. Final preparations are currently underway for BIOFACH 2026. From 10-13th February, the trade fair will once again open its doors at the Nuremberg exhibition centre. This year's slogan is **"we're going new directions, together"**. Regional – national – international: we can't wait to meet many of our long-standing customers, suppliers, contract farmers and partners in person at the fair! Come and see us in hall 7, booth 326 – like last year, agaSAAT GmbH will be an exhibitor at the North Rhine-Westphalia pavilion.

### **Pumpkin seeds**

Chinese exporters are gearing up for the New Year festivities and shipping capacity is fully booked. Prices remain stable due to rising demand from the domestic market and high export volumes up to Chinese year end. A period of calm returns for now, with no exports scheduled to go out before mid-March.

### **GWS A & AA grades**

Prices for GWS seeds continue to go in the same direction. Poor availability has made prices rise once more. Available quantities are becoming increasingly scarce. Sales to non-EU countries in particular show no sign of slowing down. We recommend making the long-term switch to goods from domestic cultivation. Pumpkin seeds cultivated in Europe are distinctly superior to GWS grades from China in terms of quality and can be cultivated sustainably.

### **Organic pumpkin seeds**

The first shipments are at sea and will arrive in the coming weeks. However, we need to wait for the first deliveries to arrive before we can get a clear picture of the quality. Even though the released samples meet requirements, goods will still be subject to time-consuming inspection on arrival at the European warehouses. The last batches to arrive from the old harvest had severe pest infestations. Hopefully, clearing out the warehouses and the arrival of the new harvest will remedy this.

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. Depending on how the weather pans out, sowing for the new harvest season is set to start

in March/April. Our farmers have just about finished planning their cultivation areas. Please contact us as soon as possible so that we can take the requisite planned areas into account when sowing.





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

# BACK\_ GEWÜRZ\_ SAATEN\_

*Natürlich und gesund genießen.*

## **Blue poppy**

Prices continue to trend steadily upwards. Demand from Eastern Europe in particular is extremely high, with a marked seasonal increase for the Easter period. In the western market, special varieties such as our **agaBLUE®** remain strongly in demand.

Processors are impressed by the quality benefits of low morphine and codeine contents. 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**

Harvesting in Turkey will start in May/June. Until then, quantities from the 2025 harvest will be delivered. Prices at source have risen significantly due to strong inflation. It will be August before the first batches from the latest harvest have been prepared, analysed and are ultimately physically available.

## **Sesame seed**

Prices remain consistent. Current SPOT requests indicate that the market is not being covered. Particularly with special varieties such as Sesame Nature and also black sesame, quality deficiencies are significantly restricting market availability. We now have to wait for harvesting to start in Argentina in February/March before special varieties become more readily available.

## **NATURLAND sesame**

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. There is currently still no let-up in the supply chain. We strongly encourage you to cover your annual requirements without delay.

## **Linseed**

There is a lack of offers from Kazakhstan, despite goods being readily available at source. However, goods imports and the necessary lead times remain extreme, and waiting times on transit routes through Russia and at import borders are a major limiting factor. The majority of available goods are currently being exported to the Chinese market, which is not subject to any delays. The market availability of yellow/golden linseed raw materials continues to be scarce.

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.





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

# BACK\_ GEWÜRZ\_ SAATEN\_

*Natürlich und gesund genießen.*

## **Sunflower seeds**

Prices remain stable and price fluctuations are deemed marginal. The weather has not led to any gap in supply. What is missing, however, is demand in the market. It would appear that sunflower seeds have fallen out of favour with end consumers. Be sure to plan prudently and for well into Q2. Please get in touch if you have any immediate requirements. We can accommodate short-term requests.

## **Organic sunflower seeds**

The availability of raw materials remains extremely limited. Prices have again risen significantly compared to last month. We recommend long-term planning for up to the end of Q3 when hopefully the 2026 harvest will be available.

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 strained. 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**

Be cautious about interesting-sounding offers from the local market.

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 any improvement.

First indications from the ongoing winter harvest in Africa suggest that prices will not fall.

## **Nigella/black cumin**

Things are still the same: drought in the growing regions, a politically fraught situation, a lack of transport and export options and no long-term let-up in sight. All of this is hampering availability and driving up prices even more. We recommend planning ahead with reliable sources and channels to avoid any surprises in terms of quality differences.

**Organic goods from Egypt** are having to contend with the same difficulties. Available product volumes are very limited and prices have risen dramatically. Quality requirements – especially from the oil sector, with MOSH/MOAH values below detection limits – are unrealistic and limit options further.



## NEWS in 2026

### agaSAAT sets new standards in cleaning, mixing & product safety

#### Combined cleaning & mixing line with AI-assisted foreign object detection

##### **Efficient. Precise. Future-proof**

Our new integrated cleaning and mixing line combines mechanical pre-cleaning, precise mixing technology, the optional addition of liquids and AI-based foreign object detection (optical sorter & X-ray) all in one continuous process.

#### Everything in one line for maximum process safety

- Multi-stage cleaning – sieving, aspiration, separation and metal separation for optimum raw material purity
- AI-assisted foreign object detection using the optical sorter & X-ray combi system
- Reliable cleaning – safely removes stones, glass, metal & other unwanted materials
- Precise mixing technology with the addition of liquids – integrated dosing of aromas, oils or functional liquids

#### Advantages at a glance

- Maximum product safety
- AI-based self-learning process
- Flexible recipe design
- High efficiency and throughput
- Gentle product treatment
- Compliant with organic and IFS standards

#### Technology you can trust

Our new line combines mechanical precision, digital intelligence and flexible recipe technology to give you raw materials that look clean, are uniform and proven to be safe.

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/>