



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

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Natürlich und gesund genießen.

agaSAAT® Market Report April 2026

Dear Readers,

It seems like the world has been thrown into disarray! Every day, we wake up to fresh reports from across the globe. We initially thought that the Strait of Hormuz blockade would mainly affect crude oil and gas imports. But now? More than 15% of the world's container capacity is unavailable, the entire goods chain has been disrupted, the price of fertiliser is skyrocketing – directly impacting the current growing season – as is the price of petrol. How sustainable is the situation? What are the implications for our business and how much more can we absorb these price rises without having to pass them on to our customers, ultimately making food more expensive?

For now, all we can do is wait and hope that things will ease up soon and that any long-term consequences for the economy, industry and end consumers will remain manageable.

Pumpkin seeds

Export prices continue to rise, driven by the huge hike in container and sea freight costs and changes to shipping routes. Shine Skin A pumpkin seeds, the most popular variety in Europe, are becoming more scarce and acreage in China is not expected to be expanded for the latest sowing season. In China, the preference is for LADY NAIL seeds, which fetch a distinctly better price domestically.

GWS A & AA grades

Availability is running out faster than anticipated. The fluctuating quality of the raw materials has once again significantly reduced the quantities available for Europe. We URGENTLY recommend you cover any long-term requirements or switch entirely to goods from domestic cultivation even though prices for the new harvest are unknown due to the current fertiliser situation. Pumpkin seeds cultivated in Europe are distinctly superior to GWS grades from China in terms of quality and can be grown sustainably.

Organic pumpkin seeds

Hopefully, clearing out the warehouses and the arrival of the new harvest will remedy the pest infestation issues. Containers continue to experience delays – the blockade of the Strait of Hormuz is also affecting Chinese exports. Quantities are scarce and highly sought-after.

Demand for **NATURLAND association goods** remains high.

If you have any outstanding requirements, we recommend long-term hedging with contract farming. It's almost time to start sowing this year's crop.

The plots are ready – we are just waiting for the perfect moment to start sowing. Please contact us as soon as possible so that we can take the requisite planned areas into account when sowing.





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Blue poppy

Experience shows that prices will rise between now and the arrival of the new harvest. Now is a good time to take out contracts for any outstanding requirements. Predictions for the new season are not exactly great. The winter poppies suffered badly from the harsh winter in northern and eastern Germany and are now being re-sown with the summer poppies. Special varieties such as our **agaBLUE®** remain consistently in demand.

The quality benefits of low morphine and codeine contents are worth the cost. If you still have purchasing needs, we can once again 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 is set to start in May/June. However, a lot can happen in the meantime.

Prices at source vary from day to day due to high inflation. If you still need to cover requirements, we would be happy to provide a current, non-binding quote.

Sesame seed

Prices at source are rising on a weekly basis. Shipping companies are charging security surcharges of up to US\$3,000.00 to stop at ports in volatile regions. Where will it end? For special varieties such as nature sesame and black sesame, we are waiting for the new harvest to arrive from South America. Shipping is scheduled for April.

NATURLAND – Sesame

The upcoming audits have been coordinated with the auditors. Now we just have to wait for their response. The start of the summer harvest is still some weeks away.

We still advise covering your requirements until the end of the year as quantities from this year's harvest will not be available on the market before then.

Linseed

Here, too, current price trends are heading in only one direction: upwards! Importing raw goods from Kazakhstan is no longer lucrative due to the current price of diesel. Rail capacity is limited. Further price rises could quickly force a rethink. Our proprietary varieties, **agaSUZANNE®** and **agaGOLDFLAX®**, offer you an alternative way to cover your requirements from local sources.

Although they are also affected by rising costs, the percentage price increase is significantly slower than it is for raw material imports. Why not support domestic farming – we are on hand with advice and practical help if you want to switch up your recipes. The fields for the 2026 sowing season have already been reserved. However, we can definitely offer you plenty of options for 2027.

Organic linseed is following the trend seen in conventional goods.



Sunflower seeds

The cost of transport from Bulgaria has gone up by about 30% in recent weeks. Many producers are no longer able to honour the contractually agreed prices and are asking for surcharges for their scheduled deliveries. You should plan prudently and with foresight. It is still much too early to make predictions about the new harvest; the sunflower seeds are yet to be sown and the lack of fertiliser nutrients in the cultivation plots doesn't bode well for the crops.

Organic sunflower seeds

We don't expect the market situation to ease up any time soon. Prices have gone up again compared to last month. We recommend long-term planning up to the end Q3 – hopefully, the 2026 harvest will be available by then.

If you require **NATURLAND-certified sunflower seeds**, please contact us as soon as possible – sowing is about to get underway and most of the cultivation areas have already been reserved. Almost all of the quantities available from the previous harvest are under contract. Here too, logistics and diesel surcharges are already being added to the prices agreed in the summer and autumn so that any deliveries can actually be made on time.

Chia

Harvesting is underway in India and although early indications are that the yields are not above average, the tripled acreage compared to last year suggests a record harvest is likely. The problems of previous years regarding residues should not be ignored. Definitive quality assessments can only be made once the first batches have been analysed. In view of this, we recommend that you plan cautiously and cover any outstanding requirements until the end of Q2. By then, the first planned quantities from the 2026 harvest in India should be physically available on the market and the requisite analyses completed.

Organic chia

Here too, we advise covering your requirements at least until the end of Q2 2026 from reliable sources, even though current market prices remain high.

The quantities available from the winter harvest in Africa have not eased pressure on the market at all.

Nigella / Black cumin

Off-season – the quantities available from Syria are already under contract. Now we just have to wait for the new harvest to arrive. We will report back soon and keep you informed of any further developments.

The market for **organic goods from Egypt** is expected to ease off significantly with the start of the new harvest in May. Current harvest predictions are looking positive – however, it will be July/August before the goods are physically available. Check your current supply to ensure a seamless transition.

It will only be possible to make a detailed quality assessment of the new harvest once harvesting has begun.

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.



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agaSAAT FOOD SAFETY program

Spring is coming fast – and pest population will increase again with rising temperatures, bringing the need for reprocessing seeds and spices back into focus. Stored product protection and quality assurance of the raw materials used are playing an increasingly important role for 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 disinfection 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>

