



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

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Natürlich und gesund genießen.

agaSAAT® Market Report May 2026

Dear Readers,

the current political situation means that we are going to have to adapt in the short, medium and long-term. Even though some ships are now passing through the Strait of Hormuz again, it will be some months before any continuity returns to commodity supply chains. In the meantime, we are preparing for the long-term consequences. Harvest forecasts have been revised down, inevitably leading to prices rising once again.

Pumpkin seeds

The market at point of origin is seeing a noticeable shift – sowing areas are down on last year by around 30%. The Chinese government has instructed farmers to use more fields for cultivating staple foods such as rice and other grains. This automatically reduces the offering for the export market.

GWS A & AA grades

Based on the latest information, this year's harvest yield is expected to be only around 1/3 of last year's at most. If demand in the export markets remains unchanged, this will mean renewed shortages. Goods will run out. We anticipate that prices will reach a new high in the long-term, even exceeding those we saw during the Covid-19 pandemic.

Organic pumpkin seeds

Developments in conventional farming are also being mirrored in the organic sector. Prices will continue to rise and the supply of raw materials available for export will be considerably limited. Batches that do not meet EU requirements for organic goods are regularly withdrawn from the market. We recommend long-term price hedging while this is still being offered by reliable sources at the point of origin.

Our **NATURLAND association goods** are now being planted, kicking off the new season. As part of our ongoing efforts to improve, we have once again made significant investments in cultivation. Thanks to innovative video and AI-assisted hoeing technology, it is possible to demonstrably increase crop yields and minimise weed growth.

If you have any outstanding requirements, we recommend long-term hedging with contract farming. Please contact us as soon as possible.





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Blue poppy

The winter poppies sown last autumn have suffered from harsh weather conditions and a distinctly colder winter compared to previous years. A good 25% of the cultivation areas had to be resown with summer poppies because the poppy plants quite literally froze. At present, the rain needed for the plant's to grow properly is lacking. All we can do is wait and see how things develop. Based on seed sales, we can deduce that the amount of land under cultivation in Europe this year is around 10 – 15% less than last year. 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

The Turkish harvest is set to start soon. Now is a good time to think about covering your requirements for the next 6 – 12 months. However, a lot can still happen before harvesting starts. Prices at source vary from day to day due to high inflation. Alternatives include **agaBLUE** – cultivated under the NATURLAND label from the Netherlands – or EU organic goods from Flanders. If you still need to cover requirements, we would be happy to provide a current, non-binding quote.

Sesame seed

Prices at source remain high and are not expected to fall. In fact, rising export and logistics costs point to a trend in the opposite direction and we currently expect prices to rise significantly. We recommend you act now to cover any requirements for the rest of the year.

NATURLAND sesame

The start of the summer harvest is still some weeks away. As yet, we do not have any definitive information on yields and available quantities.

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

The cost of imports from Kazakhstan has risen considerably due to the current price of diesel. Providers from neighbouring EU countries are currently struggling to offer competitive prices. As a result, the price gap involved in switching to domestic cultivation is much smaller. The sustainable supply chain and short delivery routes are paying off. Our proprietary varieties, **agaSUZANNE®** and **agaGOLDFLAX®**, offer you a way to sustainably 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 as well – we are on hand with advice and practical help if you want to switch up your recipes.

Organic linseed is following the trend seen in conventional goods





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Sunflower seeds

Prices are currently stagnating at a high level due to rising logistics costs. The market is cautious and only covers short-term needs. The new sowing season has only just begun and all contracts agreed to date are purely speculative. Plan carefully to ensure you have sufficient reserves, just in case.

Organic sunflower seeds

Here as well, organic goods are following the trends seen in conventional commodities. 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

The situation remains quite strained. The Indian harvest got off to a late start and we are still waiting for the first samples to be released so that their quality can be assured by accredited German laboratories. We are fortunate that we can rely on trusted partners in our growing regions to ensure a continuous supply of goods.

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.

Nigella / Black cumin

Harvesting is about to get underway in Egypt. However, it will be a few weeks yet before the first harvested samples are despatched. Based on current market information, processors are expecting prices to fall to the level of the last offer price from the off-season. We are currently unable to meet these expectations. The asking price for the 2026 harvest has been set and is significantly above last season's entry-level prices. Harvesting in Syria is still about 6 – 8 weeks away.



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>

