

agaSAAT® Market Report July 2026

Dear Readers,

While Europe is currently basking in the midsummer temperatures, winter has already arrived in other parts of the world and the first night-time frosts mean further delays to the planned harvest. We know only too well how this affected last year's harvest in South America. Hopefully, this year it won't be as bad.

Trying to reconcile the different seasons and changes is always a challenge. In the run-up to Christmas exports, shipping companies have once again doubled the cost of sea freight. It's now a case of waiting for prices to return to normal or purchasing additional capacity at significantly elevated rates if you need to cover your requirements quickly.

Pumpkin seeds

The latest price rise is due to changes in sea freight rates – up 70% compared to last month. This is having an immediate impact on costs. Initial estimates and quotes for the upcoming October harvest are now available. Having analysed the latest data, we anticipate a significantly smaller harvest and therefore further price rises. We need to wait for the first harvested samples to arrive before we can better assess how well the new harvest will meet import quality demands.

We strongly recommend that you cover any long-term requirements through to the end of Q1 2027 – in spite of the current rise in transport costs, we advise you to enter into a contract as soon as possible.

GWS A & AA grades

There is still some way to go before the first batches from the 2026 winter harvest make their way onto the market. Availability at point of origin has been exhausted – any outstanding requirements will have to be sourced locally. Despite the advice given in recent months, enquiries for short-notice deliveries are mounting up; demand significantly outstrips the available supply. We expect prices to reach a new all-time high in the long term due to the cultivation areas being scaled back yet again.

Organic pumpkin seeds

EU-compliant organic GWS A/AA seeds are unavailable. Expensive Skin Shine AA-grade goods can still be procured. But here as well, rising shipping costs are driving prices up further. Cultivation in Austria, in particular, is well behind schedule. Locally grown plants offer an alternative for covering any immediate requirements, although stocks are running low here as well.

NATURLAND certified goods: Plots have been prepared and the majority are already secured under contract. All we can do now is wait and see how the weather and plants pan out.

If you still have any requirements, we recommend long-term hedging with contract farming. Please contact us as soon as possible to secure your demand on time for the 2007 sowing season.

Blue poppy

The fields are developing at different rates. The rainfall of recent weeks has varied considerably across locations. This means that forecasts and estimates following the first round of field inspections vary widely. The first of the yield reports at the start of the winter poppy harvest should provide some clarity. Providing the weather holds, the first fields should be ready for harvesting within the next fortnight. In Czechia, the plants are lagging behind. However, as long as weather conditions remain favourable, they should manage to catch up. The first of the summer poppies are just starting to flower.

Special varieties such as our **agaBLUE®** remain consistently in demand.

The quality benefits of low morphine and codeine contents really pay off. The contract-grown harvest in Germany is imminent. Here as well, we are waiting to hear about yields and the first analyses. Summer sowings in the Netherlands are growing on schedule and progressing well. Again, we will have to wait to see how the summer pans out and hope that enough rain falls at the right time.

Organic poppy // EU Organic and NATURLAND

NATURLAND-certified organic blue poppy from the new harvest is currently still unavailable. Here, too, we are waiting for harvesting to start in a few weeks time before we can offer quantities to cover the second half of the year. At present, due to the balance between supply and demand, we expect the market to stabilise.

Sesame seed

Prices have gone up again compared to last month and are not currently expected to come down. The Chinese market, in particular, is causing prices to consolidate due to the sharp rise in exports. The summer harvest in Africa is yet to start – however, volumes will be much lower compared to the main harvest at the end of the year. It is still too early to say anything definitive about the quality and yields of the summer harvest.

NATURLAND sesame

We are waiting for the first reports from the cultivation areas about the quantity and quality of the upcoming harvest. At present, it is still too early to make any definitive statements in this regard. We still recommend covering your requirements for the rest of the year. We've been able to secure new growing regions to cater to an increase in requirements.

However, harvesting in these new source locations is not due to begin for another few weeks or months.

PLEASE NOTE!! Some certificates at the point of origin have been rejected. This will have an enormous impact on the market and future developments. We have made arrangements and can still offer quantities from other sources at short notice to cover your requirements – please contact us right away!!

Linseed

Prices remain fixed at a high level. Goods imported from Kazakhstan continue to be expensive due to current logistics costs and surcharges. As the holiday period gets underway, we are also keeping a close eye on the borders. There is a strong possibility that import and waiting times at customs will once again increase significantly. Due to the huge hike in logistics costs, 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. Here, too, we are feeling the effect of rising costs.

The first round of field visits were consistently positive; the plants are coming along nicely. Fields that were sown late are just about to start flowering. Thanks to the rain in May and June, the soil has enough moisture to withstand the first spell of summer heat. Why not support domestic farming – we are on hand with advice and practical help if you want to switch up your recipes.

Organic linseed is following the trends seen in conventional goods

The fields are looking good in the organic sector as well. Harvesting is due to start in the first of the growing regions in the coming weeks. Based on current estimates, harvesting of domestic crops is scheduled to begin in late summer.

Sunflower seeds

The summer break and planned downtime in the hulling plants is being extended. Hulling will resume when the new harvest arrives in September/October.

Temperatures in some parts of Europe have already exceeded 40°C, and no rain – which the plants need to grow – is forecast for the coming weeks in the important Bulgarian growing regions.

Please check your requirement and stock planning as soon as possible to ensure that there will still be enough goods available. Prices in the cooking oil sector are expected to rise further over the next 12 months. This will also affect sunflower seeds used for processing in other branches of the food industry. The first quotes for the new harvest are significantly higher than last year. All in all, harvest predictions for 2026/2027 remain optimistic, although we will need to closely monitor several risk factors in the coming weeks.

Organic sunflower seeds

We recommend long-term planning up to the end Q3 – hopefully, the 2026 harvest will be available by then.

NATURLAND-certified sunflower seeds

All available quantities from the previous harvest are already 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. Predictions for the new harvest from the certified growing regions are significantly poorer than those for conventional seeds.



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

BACK_ GEWÜRZ_ SAATEN_

Natürlich und gesund genießen.

Chia

The first preliminary contracts for the new harvest in Paraguay have already been signed. Prices are approx. US\$250.00/metric tonne higher than for the previous harvest. However, warnings and reports about night-time frosts and the associated delays to the harvest are already coming in. We saw last year just where this can lead: contracts not being fulfilled in accordance with the agreed terms, prices repeatedly revised upwards, shipping time frames considerably delayed due to delayed harvesting and lack of processing capacity. In other words, don't put all your eggs in one basket; spread the risk when making additional purchases.

Organic chia

Here too, we advise covering your requirements at least until the end of the year from reliable sources. We expect shipments of the new harvest from the countries of origin to be available from September 2026 at the earliest. In the meantime, we will just have to be patient.

Nigella / Black cumin

Harvesting in Egypt is imminent. However, it will be some weeks yet before the first harvested samples are dispatched. We are unable to confirm the expected fall in prices based on the market information we received in advance.

The asking price for the 2026 harvest has been set and is significantly above last season's entry-level prices.



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.



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

BACK_
GEWÜRZ_
SAATEN_

Natürlich und gesund genießen.

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 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>

