

agaSAAT® Market Report August 2026

Dear Readers,

The summer has a strong grip on us and the consequences of the prolonged drought are already apparent. Many regions lack that long-awaited rainfall – in parts of Europe, such as France and Spain, fires and wildfires have destroyed a large proportion of woodland and fields. The effects are also clearly tangible in Germany. Premature ripening and reduced grain weight will lead to a drastic price increase.

Pumpkin seeds

There have already been initial assessments and offers for the early October harvest. The extent to which the qualities of the new crop meet the import requirements for the European market will not be possible to assess better until the first harvest samples arrive.

On the basis of current developments in the world market, there is no sign of any approach to reduce shipping and raw material prices. We strongly recommend long-term security by the end of Q1 2027 – despite the currently huge transport costs

GWS A & AA qualities

There is still a long way to go until the first quantities from the 2026 harvest will be available again on the market. Availability at origin is exhausted. We expect prices to reach a new all-time high in the long term due to the cultivation areas being scaled back yet again. Plan for the long term and secure your requirements into Q2 if possible

Organic pumpkin seeds

GWS A / AA are no longer available in EU-compliant organic quality. The Shine Skin qualities of the high-priced AA produce are still available. But here, too, the increased shipping costs continue to drive prices up. As far as European growers are concerned, the effects of the long-term drought are visible. Austria and southern Germany in particular are struggling with the drought. Expected yields for the new crop have already been significantly lowered. If rain fails to come, the plants will reject the maturing pumpkin seeds.

NATURLAND organic association-certified produce: We are hoping for precipitation – up until now, the pumpkins have benefited from the water retention capacity of the heavy clay soils typical of the Lower Rhine. But here, too, there needs to rain soon so that the pumpkin seeds can continue to develop. If the rains fail to come, we will have to prepare for a crop failure, as the seeds will not continue to develop. If you still have further requirements, you are advised to consider long-term security from contract cultivation. Do not hesitate to contact us in good time to secure the areas for the 2027 sowing season.

Blue poppy

The yields of the winter-sown poppy harvest were below average. Due to the lack of precipitation, only half of the average crop yield could be harvested over a large area. The areas for the summer-sown poppy seed – soon to be harvested – do not look promising either. If the crop yield is confirmed here, we expect a huge price increase in the market, as supply will then be significantly lower than demand. Initial offers for advance contracts for the new crop have already been withdrawn and adjusted upwards with a significant mark-up by farmers – due to the persistent drought and economic influences (price increase for diesel, artificial fertiliser, minimum wage).

The demand for special varieties such as our **agaBLUE®** remains consistent.

The qualitative benefits – with low morphine & codeine values – are paying off. The German contract cultivation harvest was also below average in terms of revenue. Here, we are awaiting the first analyses to confirm the quality parameters identified. The summer sowing in the Netherlands is struggling with the lack of rainfall.

Organic poppy // EU organic and NATURLAND

Our NATURLAND-certified organic Poppy is about to be harvested. Currently, due to the balanced supply and demand ratio, we are expecting stable market and price developments. However, higher logistics costs and fuel surcharges will also have a negative impact on prices for the new season.

Sesame seed

Worldwide demand has increased significantly compared to previous weeks. International tenders are being supplied from a variety of sources. This ensures a steady or rising market. We anticipate that prices will continue to rise in the course of further developments. Don't hesitate to cover your requirements until Q1 2027 – the current price levels are still interesting with regard to providing long-term security. Please take the extended import lead times into account – these continue to experience significant delays due to the current laytimes and waiting times at the EU ports.

NATURLAND sesame: 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 cultivation areas in order to extend the coverage accordingly.

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

PLEASE NOTE!! – Some certificates at the point of origin have been revoked. 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

Goods imported from Kazakhstan continue to be expensive due to current logistics costs and surcharges. We are also concerned about the further developments in the Russia/Ukraine conflict. The transit of raw goods from Kazakhstan is becoming increasingly difficult. There is a strong possibility that import and delays at the border will once again increase significantly.

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 positive; the plants have developed nicely. Late-seeded areas did not survive the July heatwave. The plants have literally been scorched. In some growing regions, we have revised **yield expectations down to ZERO**.

Why not support domestic farming? We are on hand with advice and practical help if you want to switch varieties.

Organic linseed is following the trend of the conventional crop

In organic farming, the areas look relatively good despite the drought due to the earlier sowing. Harvesting is due to start in the first of the growing regions in the coming weeks. Based on current estimates, the harvest in domestic areas will start as planned towards late summer. What the yields will ultimately be like remains to be seen and cannot be estimated at the moment.

Sunflower seeds

Current information from the growing regions is more likely to be rated as positive compared to previous years – however, global influences on general market events have a significantly stronger impact on continuing price developments.

Please check your requirement and stock planning as soon as possible to ensure that there will still be enough produce available. The cooking oil sector continues to see price rises – this will also be applied to sunflower seeds for processing in the other food industry sectors and will create internal price competition in the final processing of sunflower seeds.

Organic sunflower seeds

Here, too, the current information is much more positive – but there is still a long way to go until the harvest. We recommend long-term planning up to the end of Q3 – hopefully, the 2026 harvest will be available by then.

NATURLAND-certified sunflower seeds

Quantities available from the previous harvest are already under firm contract. Surpluses are not available. Here, too, logistics & diesel surcharges are already being added to the prices agreed in summer and autumn in order to make delivery on time possible at all. The forecasts for the new harvest from the certified crop areas are significantly worse than for conventional seeds.

Chia

Due to the current weather conditions, the ongoing harvest had to be disrupted again. It is not yet clear how it will pan out. It will be some time before the first quantities from the new harvest are shipped. The entire schedule has been delayed by the suspension of the harvest. Prices have literally skyrocketed in recent weeks. A price increase of up to 25% is difficult to explain – but this is the norm. This will also continue to drive up prices in the spot market. The latter has been devastated and we are keenly awaiting the first contracted shipping dates from the points of origin. If you have further requirements before October, it will be difficult to secure them.

The first advance contracts for the new harvest in Paraguay have already been concluded.

We would advice to split the risk when purchasing.

Organic chia

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.

Millet

Here, too, we have seen a huge rise in prices. The reduction in crop yields and the continuously increasing costs for energy and logistics are having a huge impact on continuing price developments. In Eastern Europe, enormous areas have already been destroyed during the heatwaves. Don't hesitate – plan for the long term.

IMPORTANT – General Freight Rate trends

Import costs from Pakistan, India, and China currently stand at US\$5,000.00 per container.

For comparison: in early June, the cost was US\$1,800.00 per shipping container.

Due to the ongoing situation in Iran, no easing of the situation is visible —even after the Christmas peak season ends, transport costs are currently expected to rise further.

Costs for truck transport within Europe also remain extremely high. There is no prospect of a reduction in fuel surcharges based on current fuel prices at service stations.



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Natürlich und gesund genießen.

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 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>

