

agaSAAT® Market Report September 2026

Dear Readers,

Where will it ever end? The current global situation coupled with daily reports of more bad news is a serious cause for concern. Looking at the Strait of Hormuz evokes a sense of **déjà-vu** – 6 months on from the start of the war, this trade route which is so vital for the global economy remains effectively closed.

Diesel prices have reached a new record high and raw material reserves are once again being tapped to ensure supply. Inflation is being felt in all spheres of everyday life, including agriculture.

Pumpkin seeds

Harvesting is yet to start. We need to wait for the first samples to arrive before we can better assess how well the new harvest will meet import requirements for the European market. Based on current trends in the global economy, prices are likely to go up. The costs of shipping and raw materials continue to rise. As before, we strongly recommend securing long-term price protection through to the end of Q2 2027.

GWS A & AA grades

Availability at origin is exhausted. Prices are likely to reach a new all-time high due to the cultivation areas being scaled back yet again.

We fully expect a shortage of GWS goods. You should plan for the long term and start to switch to domestic suppliers. This is the only way to ensure that average annual demand for GWS goods in the European market will be met.

Organic pumpkin seeds

Here as well, rising shipping costs continue to drive prices up. The quality of this year's harvest cannot be assessed until the new harvested samples have arrived. That is still some months away. As far as European growers are concerned, the effects of the long-term drought are visible. Some fields are already being harvested now in an attempt to prevent a total crop failure. We are looking at yield losses of up to 50%, particularly in Austria and southern Germany.

Prices are quite literally sky-rocketing, fuelled further by rising energy costs.

NATURLAND organic association-certified produce: If you still have any requirements, we recommend long-term hedging with contract farming. Please contact us as soon as possible to secure your plots in good time for the 2007 sowing season.



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Blue poppy

It has been confirmed that yields in the main growing region, Czechia, are below average. Supply is distinctly below the annual average, causing prices to go up. Price adjustments in the market have already begun. We recommend you plan as soon as possible to secure your long-term requirements whilst stocks are still available.

Demand for special varieties such as our **agaBLUE®** remains consistently high.

The quality benefits of low morphine and codeine contents are worth the cost. As reported, the German contract cultivation harvest was also below average in terms of revenue. Here as well, prices will need to be adjusted upwards so that we can support our long-standing contract growers and partners and ensure that the cultivation areas will be secured for next season as well.

Organic poppy // EU BIO and NATURLAND

At present, due to the balance between supply and demand, we expect the commodity market to stabilise. However, higher logistics costs and fuel surcharges will also have a negative impact on prices for the new season.

Sesame seed

Based on general developments in the global market, we anticipate that prices will continue to rise. You should act now to cover your requirements through to Q2 2027 – current price levels are still attractive for long-term security. The limited availability of unhulled sesame from South America will also have an impact on prices for hulled sesame, since the hulling plants are having to pay considerably more to secure raw materials.

NATURLAND sesame: Unfortunately, it is still too early to give you any definitive information. 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 still some way off.

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

We are also concerned about the further developments in the Russia/Ukraine conflict. The transit of raw goods from Kazakhstan is becoming increasingly difficult. Ongoing shipping restrictions caused by low water levels are also making it more difficult to import raw materials by sea. In addition, it is highly likely that import and laytimes at borders will again rise sharply. Even the positive estimates for the current harvest will not alleviate market prices.

Our proprietary varieties **agaSUZANNE®** and **agaGOLDFLAX®** are also feeling the effects of rising costs. The first batches are undergoing quality assessment. A definitive yield assessment is not yet possible. Many of the plants were quite literally burnt during the first heatwave. In these growing regions, we had already revised **yield expectations down to ZERO**.

Organic linseed

In spite of the drought, the organically farmed fields are looking comparatively good.

Here, too, we are waiting for the harvest analysis results and for the raw goods to be approved before we can begin final processing. To ensure that we can operate sustainably and in the long term, we will inevitably have to pass the increased operating and harvesting costs on to the raw material price.

Sunflower seeds

The new harvest has been delayed by about a fortnight. Even though predictions are looking better than in previous years, we won't see a record harvest. Global factors affecting the general state of the market continue to have a significant impact on further price trends. The oil market in particular is in direct competition with conventional bakery products.

Please check your requirement and stock planning as soon as possible to ensure that there will still be enough produce available. The hulling plants are bracing themselves for significant cost hikes in import logistics; transporting supplies by water is only possible to a limited extent due to the sustained low water levels.

Organic sunflower seeds

Here, too, we are facing the same challenges as in conventional farming. Harvesting is still a long way off. We advise you plan with foresight for the long term.

NATURLAND-certified sunflower seeds

Predictions for the new harvest from the certified growing areas are significantly worse than those for conventional seeds. Cultivation in Europe, in particular, does not bode well.

Add to this, the rising costs in the supply chain – from the farmer to the hulling plant, everyone involved is having to contend with rising costs and this is impacting the final raw material price.

Be prepared for significant price increases compared to last year.

Chia

The entire schedule has been pushed back due to harvesting being paused. We are preparing for the same start as last year. Contracted quantities are not going to reach the market on time; this will result in a drastic shortage in Q4 2026 and prices will skyrocket once more. If you have further requirements before October, it will be difficult to secure them.

Samples from the latest harvest in Paraguay are in transit so that the requisite approval analyses can be conducted at the accredited German laboratories.

Don't put all your eggs in one basket – split the risk when purchasing.

Organic chia

The situation is the same as in conventional farming. Due to the harvest being delayed, the entire supply chain has ground to a halt, leading to a shortage in the scheduled supply of goods.

Please plan for the long term to cover your requirements.

Millet

In eastern Europe, enormous areas have already been destroyed during the heatwaves. Don't hesitate – plan for the long term. The fall in crop yields and the continued rise in costs for energy and logistics are having a huge impact on future price trend percentages, particularly for millet.

Buckwheat

Poor harvest predictions suggest that the cost of buckwheat will also rise significantly. The first preliminary contracts for the new 2026 harvest are already 30% higher than they were this time last year. Due to the further significant rise in container and logistics costs, there is no sense in switching to imported goods because prices are displaying an upward trend here as well.

PLEASE NOTE! – Freight price trends

Import costs for goods from Pakistan, India and China are currently at US\$6,800.00 per container.

By comparison: At the start of June, costs were still at US\$1,800.00 per shipping container.

Haulage costs and surcharges within Europe are also still extremely high.

Based on current prices at the petrol pump, no reduction in fuel surcharges is in sight.



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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>

