

agaSAAT® Market Report October 2026

Dear Readers,

As we approach the end of 2026, planning and preparations for stocktaking, year-end reports and the start of the new year are in full swing. How will the last quarter pan out? What surprises and challenges does the rest of the year hold in store for us? If only we could predict the future, some decisions might be easier! Our aim is to keep you as up-to-date as possible about topics, trends and developments in our core business, and we hope that this will be helpful for your future planning.

Pumpkin seeds

Harvesting in China is well underway. Scaled back cultivation areas in China will restrict availability in the market. It is still too early to say anything definitive on the quality of the new harvest. We anticipate a significantly more stable market and rising prices in the long term and advise securing your requirements up to the end of Q2 2027.

GWS A & AA grades

We are continuing to monitor the situation extremely closely while looking ahead. There is no surplus left over from the previous harvest. The expected yield will fall far short of meeting global demand. What's more, maximum residue levels mean that batches selected for the European export market will be restricted.

Organic pumpkin seeds

We are not yet able to assess the quality of this year's seeds. Harvesting is currently in progress and we are awaiting the latest updates. It will several months before the produce reaches us here in Europe.

As far as European growers are concerned, the effects of the long-term drought are visible. 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

As previously reported, supply is well below the average annual volumes. Prices are going up as a result. The processing plants will be operating at full capacity by the end of the year. Please 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 high.

The quality benefits of low morphine and codeine contents really pay off. In contract farming, the necessary price adjustments have been made. Nevertheless, we have seen a loss in cultivation areas in the run-up to autumn sowing. Long-standing partner farms have now stated that, due to below-average yields and ongoing climate change, they will no longer be growing blue poppies in the autumn.

Organic poppy // EU BIO and NATURLAND

Due to the balance between supply and demand, we still expect the commodity market to stabilise. However, in addition to higher logistics costs and fuel surcharges, ongoing fluctuations in exchange rates and the strong US dollar are also having a negative effect on prices.

Sesame seeds

The markets are boosted by global demand and particularly the rise in exports from various points of origin to China. 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. The winter harvest arriving from Africa will be used to generate the results for Q2 2027.

NATURLAND sesame: We still recommend covering your requirements for the rest of the year. In our newly acquired growing regions, harvest time is approaching. We will update you with developments as soon as we know more.

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.



Linseed

The effects of the Russia–Ukraine conflict continue to unfold. Supplying fuel to lorries for cross-border transportation is becoming increasingly complicated. Likewise, the transit of raw goods from Kazakhstan. In addition, ongoing shipping restrictions mean that the raw materials cannot be brought in by sea. Import and wait times at the EU border have increased considerably yet again. Currently, lorries are waiting at import borders for on average 7–10 days. In view of this, we recommend that you plan for the long term and secure your requirements through to Q1 2027.

agaSUZANNE® and **agaGOLDFLAX®**: The first batches are undergoing quality assessment. As yet, we are unable to comment on the quality of the harvest but we will update you once we have confirmation.

Organic linseed

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 market currently appears to be stabilising somewhat and price fluctuations and speculative trading have eased off a little. Current offers are still significantly higher than last year but this is due to the increase in logistics costs. The global market for sunflower oil has also seen a further price rise. Therefore, for many farms, marketing the oil and sunflower protein offers better returns. Keep a critical eye on the market and any developments but be cautious.

Organic sunflower seeds

Here, too, we are facing the same challenges as in conventional farming. Harvesting has begun but as yet we cannot confirm the quality of the produce.

We advise you plan with foresight for the long term.

NATURLAND-certified sunflower seeds

The first batches from the new harvest are expected at the turn of the year. If you require NATURLAND-certified raw materials, please contact us right away – there is still some time before sowing starts, although most of the cultivation areas have already been reserved.

Chia

The latest harvest from South America is headed for Europe and will be available in around 6–8 weeks. Samples have been independently tested and the relevant contracts arranged. We are tracking our purchases several times a day. Prices for additional shipments from the point of origin have gone up but are currently stable at a high level. We continue to recommend that you cover any long-term requirements urgently.

Organic chia

Here as well, the first of the containers are in the final preparation stage before shipping. Extensive approval analysis testing in the accredited laboratories in Germany has significantly delayed the shipping process. Given current shipping lead times, we expect the goods to be physically available in early/mid-January 2027. We recommend you plan ahead cautiously to avoid any shortfall in supply. It is advisable to have a reserve supply in place.

Millet

In eastern Europe, enormous areas have already been destroyed during the heatwaves. Supply currently remains tight. Harvesting started late and supplies from the Ukraine are facing the same delays as linseed at the EU import borders. Again, we advise you to think ahead and plan for the long term. Here as well, the increased costs associated with procuring goods are reflected in the pricing. Secure your required quantities as soon as possible.

Buckwheat

Prices for buckwheat have shot up. Compared with last year, prices have risen by nearly 35%. This is due to the below-average quantities harvested in Europe. Switching to imported goods doesn't really make sense right now either. Current import freight charges and customs duties, combined with the extremely high costs associated with transporting goods inland from the ports, are making imports even more expensive.

The same goes for **organic buckwheat**. Here, supply is even more limited and prices are rising week on week. We strongly encourage you to secure your long-term supply without delay.

General cost trends

Fuel prices have risen significantly yet again in recent weeks due to current geopolitical developments. This trend is now being felt in all areas of daily life. In light of this, we have no choice but to introduce a diesel surcharge in the near future to offset the additional costs we are incurring.



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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>

