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agaSAAT® Market Report November 2026

Dear Readers,

time really does fly and another exciting year is already drawing to a close. We're now entering the home stretch of 2026 – stock-taking arrangements are ramping up and Christmas is just around the corner. Preparations for the new season are under way. As one harvest ends, the cycle starts anew. The winter crops for the new season have already been sown, and final area planning with our contract farmers for the summer crops is in full swing to ensure that we are well positioned for the new year. Competition for cultivation areas is intense, and with the global situation not making things any easier, the world of seeds remains challenging.

Pumpkin seeds
Scaled back cultivation areas in China are noticeably restricting market availability. 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
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. Results from preliminary samples received so far are concerning. Most of the batches already tested are unsuitable for use within the EU. We strongly recommend you switch to locally-grown seeds to avoid any shortfalls in supply.

Organic pumpkin seeds
We are waiting for the latest updates on the Chinese harvest. As things stand, the outlook is also far from satisfactory. We are working on the assumption that most of the produce will NOT meet requirements for organic imports in the EU. Prices for available quantities have already rocketed.
In Europe, growers are feeling the effects of the prolonged summer drought. Yields of just 400 kg per hectare are the norm in many growing regions.
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

Prices have stabilised due to the current market equilibrium. The processing plants are still busy processing the harvested crop and will be until the end of the year.

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. Due to price uncertainties, some of our long-standing partner farms have stopped growing poppies. Below-average yields and ongoing climate change, coupled with the current market situation and prices, mean that growing blue poppies is no longer profitable.

Organic poppy // EU Organic and NATURLAND

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. Supply and demand are in balance.

Sesame seed

Here, prices have shot up and are expected to rise further in the coming weeks. All of the volumes available from the first of the harvested regions have already been contracted. The upcoming KOREA tender will remove yet another portion of the delayed Nigerian harvest from the market. There is no let-up in sight.

Please plan for the long term to cover your requirements.

NATURLAND sesame: Unfortunately, we are yet to receive confirmation from Africa as to whether the winter harvest will yield sufficient volumes. We are working on the assumption that, possibly at the start of the new year, quantities with association certification will be confirmed retrospectively pending the audit that is currently under way. Options from alternative sources are very limited and can only go so far towards making up for the shortfall from Africa. Price structuring in our newly acquired growing regions is significantly higher than established rates, so brace yourself for price hikes.

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Linseed

The effects of the Russia–Ukraine conflict are being clearly felt. Over the past fortnight, prices have risen sharply once again. The transit of raw goods from Kazakhstan remains difficult. In addition, ongoing shipping restrictions mean that the raw materials can only be brought in by sea intermittently. Import and wait times at the EU border are brutal and are impossible to quantify in any way. Lorries are still 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 have arrived and have been cleared for delivery. We are pleased to be able to offer goods from our European contract farmers for prompt delivery and look forward to receiving your requests.

Organic linseed

Here, too, the harvested volumes have now been comprehensively analysed and the first of the call-off orders are being prepared for dispatch. 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. Given the general market trends, we cannot risk losing the regional cultivation areas that we need to guarantee our supply.

Sunflower seeds

The market for cooking oils continues to rise and demand is not letting up.
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. Higher transport costs for lorry deliveries are also having a significant impact.

Organic sunflower seeds

We still cannot confirm the quality of the produce. However, we expect to have a clearer picture within the next fortnight, allowing us to make an assessment. Some suppliers from Bulgaria have already withdrawn their offers – all available volumes have already been contracted. You should plan 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.

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Chia
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 are in the process of planning the supply route from the receiving port to the warehouse. We continue to recommend that you cover any long-term requirements urgently.
Organic chia
Here, too, the first batches are now on their way. Extensive approval analysis testing in the accredited laboratories in Germany has significantly delayed the shipping process.
We recommend you plan ahead cautiously to avoid any shortfall in supply.
It is advisable to have a reserve supply in place.

Millet
Delivery delays and a shortage on the market have caused prices to rise drastically. Given the current global situation, transit times of up to six weeks are to be expected. You should plan for the long term and secure your requirements up to the end of Q2 2027. We also recommend keeping sufficient stock reserves to cover these potentially six-week lead times.

Buckwheat
Compared to last year, our prices have now doubled. The market is empty. This is due to the below-average quantities harvested in Europe. We advise you to make the switch to imported goods as soon as possible. Current import freight charges and tariffs, coupled with the extremely high onward transport costs from the receiving ports, mean that prices remain high; however, at present, supplies from third countries are still possible.
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.

End of year & stock-taking
Please see our separate correspondence regarding the end of the year and scheduled stock-taking and submit your call-off requests in good time so that we can process your orders smoothly, even over the upcoming Christmas period.

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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

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