

# Entering the European market for sesame seeds

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Sesame is a versatile oilseed that is used in a wide variety of food applications in Europe. The many producing countries in Asia, Africa and Latin America make sesame a competitive and volatile market. To successfully enter the European sesame market, your product should be of high quality and must fulfil stringent food safety requirements.

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## 1. What requirements must sesame seeds comply with to be allowed on the European market?

As with all food products entering the European Union (EU), sesame must meet general food safety and quality requirements. You can check CBI's summary of the [requirements that suppliers of grains, pulses and oilseeds must comply with](#) to put their products on the EU market.

Also, the European Commission has set up [My Trade Assistant](#). This search engine enables small businesses to look up information on product rules and requirements, by EU country and on a product-by-product basis. You can check the export requirements using Harmonised System (HS) code 12074090 for sesame seeds.

Food safety and product quality are the most important aspects, but some buyers will also require you to address corporate social responsibility (CSR) issues.

### What are mandatory requirements?

#### Food safety: limited presence of pesticides and contaminants

Consumer safety is the most important consideration for any food product sold in the European market. To guarantee that the sesame you sell meets [EU food safety standards](#), you must ensure traceability throughout the supply chain. Food safety requirements include limited or no [pesticide](#) residues, [contaminants](#) such as metals or [microbes](#) such as salmonella or *E. coli*. To meet these standards, you must apply the principles of the [Hazard Analysis Critical Control Point \(HACCP\) system](#).

Failure to comply with food safety standards can result in the EU applying stricter controls or even temporarily prohibiting imports from your country. [In the past 2 decades](#), there have been various notifications through the [EU Rapid Alert System for Food and Feed \(RASFF\)](#) concerning salmonella in shipments of sesame seeds from India and from some African countries. In 2020, several incidents were reported to the alert system concerning high residues of the [unauthorised substance](#) ethylene oxide in sesame seeds imported from India. On an unprecedented scale, Member States ordered recalls and withdrawals of such products from their markets.

[EU Regulation 2019/1793](#), which was updated in January 2022, lays down rules on the temporary increase of

controls and emergency measures for sesame imports from 5 origins. It requires increased checks for salmonella contamination in imports from India, Ethiopia, Nigeria, Sudan and Uganda. In the case of India, expanded checks also concern the presence of ethylene oxide (maximum residue level of 0.05 mg/kg). The measures apply to both raw and processed sesame.

Another concern in sesame seeds are aflatoxins, which are produced by certain moulds. The European Commission has laid down [maximum levels and testing guidelines](#) for the main types of aflatoxins (see Table 1; sesame seeds fall under oilseeds).

Table 1: Maximum permitted levels of aflatoxins in sesame seeds

Relevant foodstuff categories	Aflatoxins - maximum levels (µg/kg)		
B1	Sum of B1, B2, G1, G2	M1	
Groundnuts (peanuts) and other oilseeds and processed products thereof, intended for direct human consumption or use as an ingredient in foodstuffs, with the exception of: — crude vegetable oils destined for refining — refined vegetable oils	2.0	4.0	-
Groundnuts (peanuts) and other oilseeds, to be subjected to sorting, or other physical treatment, before human consumption or use as an ingredient in foodstuffs, with the exception of: — groundnuts (peanuts) and other oilseeds for crushing for refined vegetable oil production	8.0	15.0	-

Source: [European Regulation \(EC\) No 1881/2006 setting maximum levels for certain contaminants in foodstuffs](#).

Note: European Regulation No 1881/2006 regulates the presence of aflatoxins. Types B1, B2, G1 and G2 are found in contaminated food, aflatoxin M1 is only found in milk products.

### Tips:

Get acquainted with the [EU food safety policy](#). Learn about the [maximum residue levels \(MRLs\)](#) for pesticides (use code 0401040 for sesame seeds) and [aflatoxins](#).

Conduct laboratory checks of your product before shipping to Europe to ensure that residue levels meet the EU requirements.

Use HS code 120740 to check the [ePing service platform](#) for information on country-specific trade measures related to sesame seeds.

Visit the website of the [Integrated Pest Management \(IPM\) Coalition](#), which provides several resources aimed at helping farmers worldwide reduce their use of hazardous pesticides.

## Labelling of allergens

If you are supplying sesame directly to retailers in the European Union, your product will have to follow the Codex General Standard for the Labelling of Prepackaged Foods or Regulation (EU) [No. 1169/2011](#) on the provision of food information to consumers in Europe.

Sesame seeds are among the most common and potent causes of food allergies and intolerances in Europe. The packaging of your product must clearly inform consumers about the allergens present. This means that you must highlight the presence of sesame in the list of ingredients, for example by using a different font, letter size or background colour (Figure 1). Moreover, labels must indicate the potential presence of other allergens, such as peanuts or nuts.

Figure 1: Example of ingredient list highlighting sesame as an ingredient and food allergen



Source: Profundo (2022)

### Tips:

Check the [EU guidance on allergens](#), intended to assist businesses in the application of the EU Regulation 1169/2011 on food product labelling in Europe.

Read the [CBI buyer requirements for grains, pulses and oilseeds](#) for additional information on labelling.

## Packaging

Sesame seeds are commonly shipped in 25 kg or 50 kg polypropylene (PP) bags or in multi-layered paper bags. Among the regulations that control food packing in the EU, 2 are relevant for sesame exports to Europe. [Regulation \(EC\) No 1935/2004](#) requires that packaging materials do not release harmful levels of their components into foods and that they do not change the taste, smell or composition of food.

For plastic materials such as polypropylene, exporters must observe [Regulation \(EU\) No 10/2011](#) on plastic materials intended to come into contact with food.

To guarantee compliance with the EU's food packaging regulations, exporters from outside the EU often rely on testing, inspection and certification laboratories.

### Tips:

Talk with your buyers in Europe about their packaging needs and clearly explain what options you can offer. Poor packaging can result in buyers choosing a different supplier.

Check out this [webinar by Eurofins](#) on product packaging considerations, changing packaging regulations and top reasons for import retentions.

## What additional requirements do buyers often have?

### Quality standards

There are no specific EU food quality standards for sesame. As a general rule, food imports into the EU must be:

- safe and suitable for human consumption;
- free of abnormal flavours and odours;
- free of dirt in amounts that may be harmful to human health (for example, there should be no dead insects or plant residues in your product);
- free of sand, living insects, mites or other impurities.

Quality grading of sesame depends broadly on its colour, oil content (52% for 1st grade, 48% for 2nd grade and 45% for 3rd grade), moisture content and purity level. Generally, 3 broad quality categories of sesame can be distinguished, which are linked to its use:

- food grade, for direct consumption;
- bakery/confectionery grade, for use in baked goods and snacks;
- crushing grade, for processing into edible oil, mostly from roasted seed.

#### Tip:

The Codex Alimentarius has set quality standards for [peanuts](#). Use those standards to get an idea of the quality requirements sesame should meet.

Table 2 provides an indication of regular, medium and premium grades for sesame seeds (other grades can be in between). For processing to sesame oil, the physical appearance is less important and seed colours can be mixed.

Table 2: Indicative specifications of natural white sesame seeds

Property	Regular grade	Medium grade	Premium grade
Dark seeds	3%	2%	1%
Purity	97%	98%	99%
Foreign material	3%	2%	1%
Oil content	48%	48-50%	>50%
Moisture	5%	5%	5%
Free fatty acid (FFA)	2%	2%	2%

Source: [Takarshi Punja \(2022\)](#)

### Tip:

Learn about the quality requirements of your buyers by discussing their expectations with them. Make sure to always deliver products that comply with these requirements. Not meeting quality requirements can result in loss of buyers and can damage your country's reputation as a supplier of quality products.

## Quality certifications

Retailers and other European buyers often expect extra food safety guarantees from suppliers. Certification schemes have become a common means to assure that products meet quality standards. Most European buyers accept food management and certification programmes recognised by the [Global Food Safety Initiative \(GFSI\)](#), including [BRCGS Global Food Safety Standard](#), [FSSC 22000](#), [GLOBALG.A.P.](#) and [International Featured Standard \(IFS\)](#), among others.

Your choice of a suitable certification scheme will depend on whether you are a sesame producer or whether you are involved in its distribution or processing. Generally, sesame processors are advised to apply a recognised food safety standard, such as [ISO 22000](#).

### Tips:

Involve your buyers in the selection of a certification scheme for your product.

Learn about the advantages of quality certification schemes by reading [CBI tips for organising your export](#) and [CBI buyer requirements for grains, pulses and oilseeds](#).

## Social and environmental sustainability

Social and environmental sustainability is increasingly important for European consumers. This may also be reflected in buyer conditions, requiring you to adhere to a code of conduct. Becoming certified under a voluntary scheme can help you meet those expectations. Examples of widely recognised standards and codes of conduct include:

- [Business Social Compliance Initiative](#) (amfori BSCI);
- [Ethical Trading Initiative](#) (ETI);
- [GLOBALG.A.P. Risk Assessment on Social Practice](#) (GRASP)
- [Rainforest Alliance](#)
- SAI Platform - [Farm Sustainability Assessment FSA](#)
- [Sedex Members Ethical Trade Audit](#) (SMETA)

### Tips:

Compare your company's principles with the labour principles set out in the [amfori BSCI code of conduct](#).

Consult the ITC Standards Map database to find and compare criteria of standards for environmental

and social protection, economic development, quality and food safety, as well as business ethics.

## What are the requirements for niche markets?

### Fairtrade

Fairtrade practices, such as [Fairtrade International](#) and [Fair for Life](#), apply to niche markets and are focused on socially conscious consumers. While still a niche, Fairtrade products are increasingly offered in mainstream supermarkets in Europe. For example, discounter Lidl has a Fairtrade product line under its own brand.

Fairtrade International has a [Standard for Oilseeds and Oleaginous Fruit](#) for small producer organisations and traders. This standard also applies to sesame seeds. Fairtrade handles minimum prices for certified products, at US\$ 1,190 / tonne for conventional and US\$ 1,300 for organic sesame seeds. In addition, a premium of US\$ 220 applies.

### Certification for ethnic consumption

Sesame is an important ingredient in ethnic cuisines in Europe. [Halal](#) or [kosher](#) certifications for natural or processed sesame seeds (tahin paste, halva) can increase the market reach of your product.

### Organic certification

Consumers in Europe increasingly prefer organic food products. To market organic products in Europe, you have to comply with organic production methods according to [European legislation](#). According to [Regulation \(EU\) 2018/848](#), in force since January 2022, producers in third countries who want to supply the European market have to follow the same set of rules as those producing in the European Union. The Regulation has also introduced stricter inspection of organic products to prevent fraud. To sell organic sesame in Europe, a certifying agency must verify that you apply the methods in accordance with the EU requirements.

Note that getting a license to offer organic-certified products in Europe through a certifying agency takes time and can be pricey.

### Tips:

Consult the [CBI buyer requirements for grains, pulses and oilseeds](#) to learn more about the requirements for the organics market in the EU.

If you are considering selling organic-certified sesame, it is a good idea to connect with buyers in Europe that specialise in organic food products, such as European organic wholesaler [Vehgro](#) or Dutch wholesaler [Odin](#). Dutch trader [Tradin Organic](#) operates its own sesame processing facility in Tigray province (Sudan), sourcing organic seeds from local farmers.

Consult the [list of control bodies and authorities operating in third countries](#) which can confirm equivalency with EU standards.

## 2. Through what channels can you get sesame seeds on the

## European market?

### How is the end market segmented?

Sesame seeds have diverse applications in food and non-food sectors. Supplying high-quality seeds and finding an experienced distributor are important steps in entering the European market with your products. Lower-quality supplies with broken seeds or inconsistent colour have potential in processed foods.

### Food market for sesame seeds

Table 3 gives an overview of important products using sesame. 2018 data shows that at 35.7%, food processing was the leading [European market](#) segment for sesame seeds. The baking and confectionery industries each accounted for around 25%. Crushing for oil extraction consumes around [7% of European supplies](#). Uniform, premium seeds find a market mainly in decorative uses of sesame seeds, especially as a topping. For making tahini or extracting oil, the physical appearance of the seeds is less important.

Table 3: European market segments for food-grade sesame seeds

Market segment	Products	Estimated share of sesame seeds use in Europe
Ingredient in food processing	Ingredient for meals (salads, sushi); ground sesame paste (tahini), also used in dishes such as hummus, baba ganoush; spice mixes (zaatar)	Important, >35% of use
Baking and confectionery industry	Topping for bread, buns, bagels, pretzels, crackers; ingredient in sweet snacks, biscuits, desserts such as halva	Important, 50% combined
Retail packed seeds	Seeds for home use, ingredient for baking or as a garnish	Very small
Sesame oil	Specialty oil, Asian and Mediterranean cuisine	Small, <10%

Sources: [FortuneBusinessInsights](#); [Fediol](#)

Figure 2: Bread rolls with sesame



Source: Pixabay (simplified Pixabay license)

### Non-food market for sesame seeds

Non-food use of sesame in Europe is small. Some sesame oil is used in the cosmetics and pharmaceutical industries. Low-quality sesame is also used in feed, for example for birds or game. The sesame oil cake obtained

during oil extraction is used in food (dehulled seeds) or livestock feed.

## Through what channels does a product end up on the end-market?

Your partners to reach the European market can either be middlemen, such as traders or brokers, or companies that process, package or market sesame products directly in Europe (Figure 3). Most sesame is imported by commodity traders supplying seeds, grains and bakery and other ingredients to the food industry.

Figure 3: Simplified overview of key European market channels for sesame seeds



Source: Profundo (2022)

Information on sesame seed contracts, standard grading parameters and other criteria is published by commodity exchanges, for example in [Ethiopia](#), [Ghana](#), [India](#) and [Nigeria](#). [Payment terms](#) to be agreed with clients can differ, with options including letter of credit, blank payment (in advance or after delivery), bank guarantee, or documents against payment or acceptance. Exporters often explain the terms on their websites, for example [Suman Export](#) (India) and [Abnaa Sayed Elobied Agro Export](#) (Sudan).

## Importers and commodity traders

Importers and traders with different specialisations play an important role in bringing products like sesame seeds to the European market. They match the demand for a product with supply that meets the requested criteria. The product may go to the end user directly or via resellers. Some traders also integrate primary processing or packaging steps for sesame, such as [Olam](#) in Nigeria, [Dipasa](#) in Mexico and [Tradin Organic](#) in Ethiopia. The Swiss organic trader [Nungesser](#) has established a steam sterilisation plant in Uganda, supplying multiple warehouses in Europe. In Europe, many of the important trading houses are traditionally located in Germany and the Netherlands (see Table 4).

Table 4: Sesame seed importers in Europe - examples

Company name	Country	Type
<a href="#">BioVeri</a>	Poland	Conventional and organic
<a href="#">Dipasa Europe</a>	The Netherlands	Conventional and organic
<a href="#">Do-It</a>	The Netherlands	Organic
<a href="#">H.A. &amp; Gustav K�uchler</a> (Acomo Group)	Germany	Conventional
<a href="#">JKT Foods</a>	The Netherlands / United Kingdom	Conventional (incl. bird feed)
<a href="#">Nungesser</a>	Switzerland	Organic
<a href="#">Olam Europe</a>	The Netherlands	Conventional



<a href="#">SIGCO (Acomo Group)</a>	Germany	Conventional and organic
<a href="#">Talianis</a>	Greece	Conventional
<a href="#">Tampico Trading</a>	Germany	Conventional and organic
<a href="#">Tradin Organic</a>	The Netherlands	Organic
<a href="#">Unidex</a>	The Netherlands	Conventional
<a href="#">Voicevale</a>	United Kingdom / France / Germany	Conventional

### Brokers with links to European customers

Brokers or agents can help you link your product to clients in Europe. Through a broker you can access a larger number of buyers. Brokers have experience with market conditions and prices and can help you arrange the logistics of the trade. They usually charge a commission for their services, depending on the type of agreement. Examples of brokers are [Anabela Foods](#) (Germany), [AVS Spice](#) (Netherlands), [Belfrudis](#) (Belgium) and [Cardassilaris](#) (Greece). Check the website of AVS Spice for an example of [general terms](#) for agreements with sellers.

### Food producers

Interesting food production segments in Europe include seed and nuts companies, manufacturers of baked goods, sweet and savoury snacks as well as tahini and halva (see Table 5 for examples). Food producers are looking for a consistent and reliable supply of raw materials. The sourcing model depends on the size of the company and the required volumes. Many small and medium-sized companies use the services of importers and wholesalers. If sesame is a key ingredient that is required in large volumes, a company may also source directly and be interested in longer-term arrangements with direct suppliers.

Table 5: European food companies - examples

Company name	Country	Sesame products
<a href="#">Barilla Group</a>	Italy	Wasa and GranCereale branded bakery products
<a href="#">Bioveri</a>	Poland	Organic producer, CrocCrac sesame bars, halva products
<a href="#">Ekibio Groupe</a>	France	Various organic bakery products
<a href="#">Haitoglou Family Foods</a>	Greece	Producer, exporter of sesame products incl. tahini, sesame butter, halva, sesame bars and sesame oil

Horizon Natuurvoeding	The Netherlands	Organic sesame seeds, nut and seed pastes, incl. tahini
Intersnack	Germany	Branded and private label snack products
Jannis	Greece	Sesame bars and snacks
Pedon	Italy	Conventional and organic seeds and grains
Seeberger	Germany	Seeds, nuts and dried fruits
Sesame & Tahina	Hungary	Conventional and organic tahini for retail and food service
Unitop	Poland	Leading producer of chalwa and sezamki

## Retail channel

Sales of sesame seeds in retail packages are still a niche market in Europe and currently hold little opportunity for direct suppliers. Retailers source these small volumes from private label product suppliers or from branded producers.

### Tips:

Visit international trade fairs to get a clearer idea of potential European buyers and their requirements. Important food fairs in Europe include [Anuga](#) (Cologne, Germany), [Biofach](#) (Nuremberg, Germany, the world's largest organic trade fair), [Food Ingredients Europe](#) (2022 in Paris, France) and the international bakery trade fairs [Südback](#) (Stuttgart, Germany) and [iba](#) (Munich, Germany).

Consider joining an online sourcing platform that connects producers and buyers. [Selina Wamucii](#) is an example of an African-based platform that provides services for agricultural cooperatives, farmer groups, exporters and processors. It also provides information on market and price developments for agricultural commodities, including sesame. Another example is [Tridge](#).

Are you based in Ethiopia, India, Egypt, Sri Lanka, Colombia, Côte d'Ivoire, Peru or Ecuador? These are partner countries of the German Import Promotion Desk (IDP). Check [its website](#) to see how IDP may be able to support you in getting in touch with European importers.

## What is the most interesting channel for you?

Sesame is a developed and competitive market with established actors and trade relationships. However, the market for sesame products is still growing and offers opportunities for new suppliers. To secure a position on this market, you need to make sure that you can consistently fulfil the quality and volume requirements of buyers. The assistance of a specialised broker or trader may be useful to gain a better understanding of what is

expected and to start supplying the European market. Once you are acquainted with the specific market demands, you can consider approaching food manufacturers to establish direct relationships.

### **Tips:**

For your first entry into the European market, a specialised broker or trader can help you connect to buyers. Before signing an agreement, research the broker's track record and reputation.

Make sure that you meet the additional buyer requirements outlined above. Being able to supply sufficient volumes at a consistent quality will make it easier to find more clients.

Check the [tips for finding buyers on the European grain, pulses and oilseeds market](#) for more ideas.

## **3. What competition do you face on the European sesame seed market?**

Sesame is a competitive market with production in many countries around the world, especially in Asia and sub-Saharan Africa (see Figure 4). Many producing countries feature high domestic consumption while also supplying international markets. Sesame's long-standing role as an important oilseed means that there are many established suppliers.

### **Which countries are you competing with?**

India, Nigeria and Sudan are the main exporters of sesame seeds to Europe (see Figure 4). India clearly dominated the market until 2020, but safety concerns related to pesticide residues in combination with bad weather reduced exports drastically in 2021. As a result, other producers have increased their volumes exported to Europe, especially Nigeria, Turkey and Pakistan. In combination with the trade disruptions caused by the COVID-19 pandemic and the harvests in some countries impacted by strong monsoons, these shifts illustrate the volatility of the global market.

African countries collectively accounted for over 60% of the global sesame seed crop in 2020. They have become attractive options to fill the gap from decreasing Indian sourcing while also offering attractive prices.

Turkey plays a special role among the suppliers of sesame to the European market. It consistently imports at least 5 times as much sesame as it exports. Imports reached 223 thousand tonnes in 2021 and exports 37 thousand tonnes. Its own production is relatively small, at 18.5 thousand tonnes in 2020. This means that Turkey has a high level of domestic consumption and re-exports part of the sesame that it imports. Turkish imports mostly come from African countries including Chad, Nigeria and Sudan. There are several hulling facilities for value adding.

The year 2021 saw a shift in European import origins (Figure 5) towards larger imports of sesame from previously less important countries or origin including Turkey and sesame-producing countries such as Pakistan, Paraguay and Somalia. This development can be explained by the gap created by the drop in imports from India and Sudan.

The large number of producers means that the global sesame market is very competitive. Product quality, quantity and price are important competitive factors in a volatile market. Companies that can ensure consistent quantities while meeting quality criteria can find opportunities in a growing European market. Many of the top producers and exporters are facing food safety concerns as well as the impacts of internal conflicts. However,

many farmers manage to supply high-quality sesame that fulfils the requirements of demanding markets, including Europe and Japan.

## **India: large producer that faces drop in European market confidence**

India is among the top-5 sesame producers globally. It supplies its domestic as well as export markets with different types and qualities of sesame seeds. However, [quality and contamination issues](#) have tainted the reputation of Indian sesame. These problems have hindered access to high-end markets such as Japan and restricted exports to the European Union. Until 2020, with 60 thousand tonnes India accounted for nearly 50% of Europe's direct imports from producing countries. In 2021, sesame imports from India dropped drastically by more than 70% to 17 thousand tonnes. The European Union had toughened import rules due to pesticide residue contamination (see [section on food safety](#) above). COVID-19 measures caused further trade disruptions. Moreover, Indian producers regularly experience negative impacts from extreme weather conditions, including drought and heavy monsoon rains.

So far Indian imports have not recovered, and it is unclear whether the country will regain European market confidence any time soon. To a large extent this depends on how the country deals with the pesticide and microbial issues. This situation creates opportunities especially for African producers to fill the supply gap.

## **Nigeria: increasing exports to Europe, contamination requires attention**

Nigeria is one of the top sesame seeds producers and exporters worldwide. Sesame production has rapidly grown in importance in the last decade. In 2021, sesame seeds, called beni-seeds locally, were the [second most important agricultural export](#) by value. Japan and China are important trade partners for sesame from Nigeria. Nigeria is aiming to further boost its production by taking advantage of its available land.

In 2021, Nigeria became the largest sesame supplier to Europe with a volume of 24 thousand tonnes, an increase of 26% in comparison with 2020. Greece (9.7 thousand tonnes), Germany (5.8 thousand tonnes), the Netherlands (3.1 thousand tonnes) and Poland (2.9 thousand tonnes) were important European buyers.

Several challenges for export growth exist. The main challenge concerns food safety. Recent cases of salmonella contamination led the European Union to introduce checks of 50% of all sesame seeds from Nigeria. This increases the price for importers and reduces Nigeria's competitiveness. [Logistical blockages and shipment delays](#) are other threats to further growth. Production remains volatile with small-scale farmers affected by adverse weather impacts and COVID-19 lockdowns. In addition, some sesame farmers in Nigeria's Northern region have fled their lands due to increasing terrorist attacks in the region.

In recent years, companies such as [Olam](#) have helped to introduce improvements in farmer knowledge and seed quality. Olam has [supported](#) farmers with improved seeds and inputs, and has two modern sesame processing facilities in Nigeria. Safety and quality measures like in-house aflatoxin testing open a wider export market also for small-scale sesame farmers and cooperatives.

## **Sudan: top sesame producer but inconsistent quality**

Sudan has consistently been the largest sesame producer globally since 2017. It has one of the highest per capita consumption figures in the world and is among the leading exporters. Sudan's exports of sesame seeds to the European Union fluctuated between 4 thousand and 16 thousand tonnes between 2017 and 2021. Greece is the leading European entry port, importing over 90% of Sudan's exports to the European Union in 2020 and 2021. The price of Sudanese sesame seeds is comparable to that of Nigerian seeds.

The drastic fall in exports to Europe in 2021 was caused by safety and quality concerns. Sudan struggles to [minimise the risk](#) of non-compliant pesticide residues, salmonella and aflatoxin contamination. These issues limit its options to become a reliable partner for the European Union and other high-end markets. Goods were frequently rejected, leading to stricter checks and causing economic loss. The European Union now requires

salmonella inspections of 50% of sesame seeds from Sudan. At the same time, the country continues to struggle with political unrest. Since January 2022, an [UNIDO facility](#) aims to help upgrading the Sudanese sesame value chain with a support project.

## **Ethiopia: high-priority crop faces insecure future**

The European Union imported 8.5 thousand tonnes of sesame seeds from Ethiopia in 2021, almost double the volume in previous years. Greece received 70% of these imports. Overall, the main market for Ethiopian sesame is China, where clients buy large volumes and put less emphasis on quality.

Sesame is the country's most important oilseed for both the local and export markets. Ethiopia has the advantage of having a vast area for sesame cultivation and a suitable climate. Sesame has been a high-priority crop for the Ethiopian government in recent years.

However, pressure on supply and demand has increased in recent years. Productivity suffered from pests and diseases and lack of inputs. International competition and price volatility created further pressure. The COVID-19 pandemic resulted in supply chain disruptions and a weakening of food supplies. With hunger risk increasing, the government held a [national campaign](#) calling for farmers to focus on planting food crops such as sorghum. In addition, military conflicts in the sesame growing regions in the North continue and have recently spread to other parts of the country. Tensions along the Sudanese border also affect logistics and supply. Therefore, sesame seed production and export [will likely continue to trend downward](#).

## **Guatemala: supplier of top-quality sesame**

Guatemala is a small sesame producer, accounting for less than 0.5% of global production in 2020. Its share in European imports also remains small but is growing, especially after India's drop in 2021. The export to Europe was stable at around 3.3 thousand tonnes per year between 2018 and 2020 and increased to 5.4 thousand tonnes in 2021. Germany (3.7 thousand tonnes) and Spain (1.3 thousand tonnes) are important buyers in the European Union, and the United Kingdom (1.6 thousand tonnes) also imports sesame from the country.

The average price (export value per kilo) in 2021 was around 20% higher than for sesame from India or Nigeria and 44% higher than for sesame from Sudan. Prices are expected to rise further in 2022 due to crop reduction caused by drought and extremely high temperatures in various countries in South America.

Guatemalan sesame is recognised as one of the highest-quality crops in the market. The exporter [Imexa](#) points to preferred characteristics including the seeds' almond flavour and aroma, white colour and large grain size. This makes sesame from Guatemala particularly suitable for decoration of bakery products and as a topping.

## **Uganda: market opportunities from organic production**

From 2017 to 2021, Uganda's exports of sesame seeds to the European Union increased from 1.6 thousand to 5.5 thousand tonnes. The most relevant European importers in 2021 were Germany and the Netherlands.

[Sesame production in Uganda](#) is driven by high-quality production, land availability and favourable growing conditions. Organic production plays an important role in Uganda, contributing almost one fifth of the value of agricultural exports. Sesame is the country's third most important organic export crop by volume. The low chemical inputs mean that the conversion potential to organic production is high. Uganda is scoring comparatively well on ease of trading compared with other African producing countries. However, its land-locked location means that transport costs are higher than from neighbouring countries.

Uganda is also still struggling with low yields, volatility due to extreme weather events, low-yielding traditional production methods, limited value adding and high certification costs for small farmers. To tap into the large potential for improving food security as well as export flows, the government launched a National Organic Agriculture Policy in 2019.

## Tips:

Evaluate the quality of your product versus those of your competitors (by comparing key characteristics such as colour and fat content). A realistic evaluation of how you compete can help you identify the best fitting market segment.

In some production countries European sesame traders and processors have their own facilities. Inquire about their product requirements and interest in expanding their sourcing.

## Which companies are you competing with?

Despite market opportunities, competition from existing suppliers is strong. Product quality (including aroma and taste, appearance, purity and oil content) and food safety play a very important role on the European sesame market. To enter the European market, you must focus on presenting a high-quality product and understand the demands of different market segments. Raw and semi-processed seeds are the most interesting.

Larger, multinational actors in the sesame seed trade play an important role in several of the main supplying countries for the European market. These include Olam Agri, one of the leading companies for sesame exports from Africa. Its [processing facility in Nigeria](#) handles 100,000 tonnes per year. Another large exporter from sub-Saharan Africa is [ETG World](#), with an estimated 15-20% market share in the global sesame trade. [Agri Exim](#), headquartered in Dubai, exports organic sesame from Uganda.

Below are some examples of local companies that supply the European market from the key supplying countries.

### Indian sesame suppliers

India has a large number of sesame exporters, often also dealing with other seeds, pulses and spices. Many of these exporters have links with the European market.

[Dhaval Agri](#) is among the important suppliers to the European market. It offers hulled, natural, black and roasted sesame seeds. The company lists its various certifications on its website, including BRC Global Food Safety Standard and organic certification. Another supplier to the European market is [Raj Foods](#), which also points to its various certifications and its ability to fulfil customer wishes. The company also promoted its services at the important Anuga food fair in 2021. Indian exporters are also keen to highlight the health benefits from consuming sesame seeds, as shown by the examples of [EverGreen Exports](#) and [HL Agro](#).

Other sesame exporters with links to the European market include [Raj Foods International](#), [Unjha Agro Company](#), [Fazlani Exports](#), [Rajmakal Agro Industries](#) and [SRSS Agro](#).

### Nigerian sesame suppliers

[Tradeford](#) lists more than 800 sesame exporters in Nigeria. Most of them also trade in other agricultural commodities.

One important local actor is [WACOT](#) (part of TGI), which is involved in sesame production in Nigeria and in exporting to consumer markets. It operates an outgrower model involving thousands of farmers in the country. In 2021, the company obtained [certification](#) by ECOCERT to export organic produce to Europe and the United States.

[Dabeth Industries](#) works with a network of farmers and cooperatives to source sesame and ginger. The company stresses specifically the freshness of its products thanks to efficient export logistics.

[Olam Nigeria](#) (part of Olam Group, Singapore) is another important sesame exporter in Nigeria. The foreign-owned company works with an outgrower programme with farmers, has a modern processing plant and ensures food safety checks before export.

## Sudanese sesame suppliers

Sudanese sesame exports to Europe have suffered from contamination and quality issues. Most exports are currently destined for China and Middle Eastern countries.

A larger local actor with activities in production, processing and exporting is [Mahgoub Sons Group](#) (MSG). It sources sesame from its own farms and through partnerships with local farmers. It operates 2 cleaning and hulling plants as well as food processing facilities. Hulled sesame, tahini and halva are also exported to Europe.

[Abnaa Sayed Elobied Agro Export](#) is another Sudanese company with diverse activities in agricultural commodities. The company has a very detailed website and is also active on various social networks, including [LinkedIn](#), [Instagram](#) and [Facebook](#).

## Ethiopian sesame suppliers

Sesame exports from Ethiopia are handled by a handful of companies, some of them joint ventures with international partners.

The Ethiopian company Olira Agro shows that targeting high-value markets and promoting specific product characteristics and processing technology can create interesting opportunities. The company promotes the Humera type of sesame, stressing its creamy colour and specific aroma. These properties make it particularly useful for bakery products and dessert food preparation and offer opportunities on the European market. The seeds are sourced from 1,800 smallholders under contract farming. Olira Agro [has a well-structured website](#) presenting its company history, its state-of-the-art hulling and roasting machinery and its product offer. The focus on higher-end markets is supported by ISO 22000 and organic certification. In 2021, Olira Agro was present at the [Anuga trade fair](#), one of the top European food fairs. It promoted its natural and hulled seeds as one of the companies supported by the German [Import Promotion Desk](#).

Two important companies in Ethiopia have established the production of value-added products like tahini. [Krotaj Tahini Manufactures](#) is a joint venture with foreign participation that exports locally produced tahini. Another sesame seeds and tahini exporter is [Ambasel Trading](#), a diversified trading house.

## Guatemalan sesame suppliers

[Imexa](#) sources sesame from small and medium-sized farmers in Guatemala. In its product description it focuses on the high quality of sesame produced in the country. The company is also present on the trading platform [Tridge](#).

[Semillas Universales](#) (Unisource Group) is a large exporter that sources from Guatemala, as well as from Nicaragua, Venezuela and Paraguay. It exports natural and hulled sesame seeds as well as tahini to key world markets, including the USA (44%), Japan (26%) and Europe (15%). The company stresses the quality of its products and lists several key certifications on its website, including ISO 9001, kosher and halal certifications.

Focusing on high-quality sesame, [Exportaciones Unidas](#) has been serving the Japanese market for decades. The company has developed plantations supervised by specialists to preserve the genetic traits of preferred sesame varieties. It has expanded operations to Nicaragua, Paraguay and Bolivia.



## Ugandan sesame suppliers

Organic sesame plays an important role in exports from Uganda and is actively promoted by companies. Among the organic exporters is [Shares Uganda](#). It stresses its close relationships with farmers and the sustainability standards applied in the production process.

Most of the sesame seeds produced in the major production hubs of Kitgum, Gulu and Lira are handled by [large exporters](#), including Olam Agri, Agri Exim and Gulu Agricultural Development Company Ltd (GADC). [GADC](#) sources organic seeds from many small farmers. It exports 2,500 tonnes per year at a 99.5% purity level. The company provides a detailed description of its farmer-related activities and its processing, quality, and sustainability standards.

### Tips:

Present your company, product types and specifications on a well-structured and regularly updated website. Include information on your approach to fulfilling food safety requirements. Listing the website on producer platforms helps to increase the reach.

Visit the online presentations of your competitors to see how they present their products and how you can compete.

## Which products are you competing with?

For the main uses of sesame on the European market, in bread products, cookies and crackers as well as processed products such as tahini, halva, hummus or sushi, market forecasts expect continuous demand from the European food industry. Where sesame can be more easily replaced, notably in bakery products or snacks, there will be competition from other trendy seeds with a healthy image. This includes flax seed, linseed or chia seeds. While tahini has a unique nutty taste, it can be replaced by other nut and oilseed butters in hummus and other spreads.

### Tip:

Ensure that your sesame is free of chemical or microbial residues. Consider obtaining organic certification as an efficient way to assure customers that your produce is residue-free.

## 4. What are the prices for sesame seeds?

Sesame prices show a large spread. The price that you obtain for your produce depends on a variety of factors, including quality (uniformity of colour, taste, odour etc.), processing level, compliance with food safety requirements and international market prices. The market price for sesame seeds can fluctuate by up to 25-30% annually.

The price fluctuation is mainly due to varying supply volumes and the overall volatility of commodity markets. Prices are heavily influenced by the supplies of major exporters like India and Nigeria and the sourcing of major importers like China.

In recent years, the world market price for sesame seeds has seen several high points. In 2018/19, India



suffered from extreme weather conditions, leading to a 10-15% price increase compared with the previous year. Global oilseeds and cooking oil prices have increased significantly since 2020, also affecting the sesame market. Causes include the COVID-19 pandemic and related labour shortages, poor harvests in Latin America and increasing demand from the biofuel industry. In recent months, Russia's war in Ukraine has further increased tensions on the vegetable oil markets. For India, market platform [Tridge.com](https://www.tridge.com) expects that the high prices in 2021 and 2022 are driving an increase in sesame planting.

Farm gate prices experience changes along with domestic and global market developments. For example, in Nigeria farm gate prices increased by about 110% within one year to October 2021. Export prices for sesame seeds from Ethiopia and Nigeria reached between US\$ 1,490 (€ 1,338) per tonne for mixed and US\$ 1,670 (€ 1,499) for whitish seeds in March 2022. Other origins achieve higher or lower prices.

Average prices for imports into the European Union varied from € 1,289 to € 1,810 per tonne between 2017 and 2021 (see Figure 6). In the first 3 months of 2022, the average price reached € 1,842 per tonne. This high average price points to a preference for higher-quality sesame.

The wholesale and retail sales prices for sesame seeds and related margins on the European market also show big variations. In addition to seed quality, processing stage and conventional or organic quality, the size of the package is an important factor. Larger wholesale packs of conventional seeds are sold at around € 3.5 to € 5 per kilo. However, retailers realise very high margins for small packages (50 to 100 grams). These uniform white seeds for decoration or spicing achieve several times that price, up to more than € 25 per kilo (Figure 7).

Figure 7: Indicative sales price ranges for hulled sesame seeds



Source: Profundo based on Eurostat (2022) and industry sources

### Tip:

Create a free account on [Tridge.com](https://www.tridge.com) to obtain basic sesame market information. The paid service includes detailed pricing and market intelligence insights. [Mundus Agri](https://www.mundusagri.com) is a paid service with regular updates on the oilseeds market.

[Profundo](https://www.profundo.com) carried out this study on behalf of CBI.

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