

# The European market potential for sesame seeds

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Sesame seeds are a widely used food product in many European countries. The role of sesame ranges from traditional foods that have been consumed for centuries to more recently popular ethnic foods. In combination with the increasing interest in healthy and vegan diets, demand for sesame has grown in the past years. This trend is expected to continue. Greece and Germany are the largest markets for sesame, while many other countries have smaller consumption levels.

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## 1. Product description

This study focuses on sesame seeds for direct use as a raw or whole seed or in food manufacturing (processing). Sesame oil, which results from the crushing of sesame seeds, is not included. Sesame seeds (excluding for sowing) are traded under Harmonised System (HS) code 12074090.

Sesame (*Sesamum indicum*) is one of the most ancient crops cultivated for its edible seeds. The one-year crop is grown in tropical and sub-tropical climates in Asia, Africa and Latin America. It produces small, flat seeds, about 3 to 4 millimetres long by 2 millimetres wide and 1 millimetre thick (Figure 1).

The characteristics differ between different sesame types in terms of look, taste and content. The colour of the seeds varies from white, golden and yellow shades to dark brown and black. Light-coloured seeds are often hulled, but also occur naturally and receive the highest prices. Mixed seeds are used for oil extraction or grinding into paste.

The smaller black sesame seeds are primarily grown and used in Asia but are also increasingly reaching other markets. They are crispier and have a bitter-sweet flavour, while white sesame has a milder taste. The black varieties contain more minerals, vitamins and nutrients than the lighter coloured varieties.

Figure 1: Sesame seeds



Source: Wikimedia Commons – adjusted photo from [Anna Frodesiak](#) (public domain)

Much of the sesame imported to Europe is used as a whole seed ingredient. It is especially a widely used ingredient in the important bakery sector in various European countries as a topping on bread, buns and pretzels (see Table 1 for content examples). It is also used in the confectionery industry and on savoury snacks and crackers.

Table 1: Percentages of sesame seeds in food products

Product group	% of sesame seed
Biscuits and cereals bars	1 to 49%
Bread	0.2 to 8%
Crackers, crispbread and rusks	2 to 10%

Source: [Dutch Front Office Food and Product Safety](#)

Despite the relatively high oil content of sesame, [Fediol](#) reports that only around 7% of imported sesame seeds were crushed for oil extraction in 2020. Sesame oil has a comparatively small market in Europe compared with, for example, sunflower, rapeseed or olive oil.

## 2. What makes Europe an interesting market for sesame seeds?

### Europe has a continuous and growing demand

Between 2017 and 2021, European sesame imports showed small but continuous annual growth, totalling 20% across the 5 years (Figure 2). This development is a sign of a fairly mature market.

### Europe is dependent on sesame imports

Europe's own production of sesame seeds is negligible, with small volumes grown in Greece and Italy. To fulfil the market demand, 144 thousand tonnes of sesame were imported into the European Union in 2021. Key sourcing countries are Nigeria, India, Ethiopia and Uganda. Turkey and Pakistan are growing in importance, but Turkey mostly re-exports seeds from Africa.

The stable demand from the European food sector provides a reliable market for sesame producers who can fulfil the European quality and food safety requirements.

Market analysts expect that the growth of the European sesame seed market will continue for the coming years. [Fortune Business Insights](#) forecasts an increase in market value between 2018 and 2026 by around 43%. It is expected that an increasing number of conventional as well as organic sesame market actors will drive this growth.

#### Tip:

Learn more about opportunities for [entering the European sesame market](#) on the CBI website. You can build long-lasting relationships with buyers if you fulfil their quality and food safety requirements.

### Increasing demand for ethnic foods creates new market for sesame

The consumption of sesame-based foodstuffs from Mediterranean and Middle Eastern cuisines has spread rapidly in Europe in recent years. Sesame paste ([tahini](#)), sweets ([halva](#)) and spices with sesame ([za'atar](#)) are available in most supermarkets now, while they were only sold in ethnic food stores a couple of years ago. From Asia especially the use of sesame in [sushi](#) has spread in Europe as well.

## Tip:

Stay on top of food trends and developments in Europe by following the news on specialised websites. Examples include [Food Navigator](#), [Food Drink Europe](#) (industry association, also publishes surveys on consumer trends) and [The Natural News Desk](#).

### 3. Which European countries offer most opportunities for sesame seeds?

Europe is seeing a consistent growth of sesame imports. The 6 largest European import markets – Greece, Germany, the Netherlands, Poland, Italy and France – accounted for more than 80% of sesame seeds entering Europe (Figure 3). Important drivers are traditional food products in Greece and Poland and various food sectors in Germany and the Netherlands. The Dutch imports are partly redistributed to other European markets. The dominant use of sesame in basic foodstuffs like bread explains why the impact of the COVID-19 pandemic is hardly visible in the trade figures.

#### Greece: Europe's number 1 user of sesame seeds

Greece is the leading European importer of sesame seeds. Over the past 5 years, imports increased at an average annual rate of 6%. Demand is driven by high consumption in traditional Greek products such as tahini (sesame paste), halva (sesame sweet), [pasteli](#) (sesame bars) and koulori (sesame-covered bread rings, Figure 4). Products like tahini and halva are increasingly finding a market in other European countries as well.

Figure 4: Sesame bread rings



Source: [Pxhere](#)

The value per tonne of Greek imports is lower than for the other main European importing countries. This can be explained by the use of ground sesame in many of the products. Since the visual appearance is less important for these uses, cheaper sesame types for processing can be used.

Greece imported around 31 thousand tonnes of sesame seeds on an annual basis from 2017 to 2020. In 2021, imports of sesame reached a record of 39 thousand tonnes. This increase was balanced out by higher than usual re-exports. The main countries supplying Greece are Nigeria, Turkey, Ethiopia and Sudan (Figure 5). The market is quite concentrated, with 7 countries supplying more than 90% in 2021.

Most sesame is consumed or processed locally, with processed foods also reaching export markets. Demand is expected to remain strong. However, the maturity of the market with high levels of traditional consumption leaves little room for growth.

One of Europe's largest sesame processors is [Haitoglou Family Foods](#). It produces a range of sesame products including tahini, sesame butter, halva and sesame bars for the domestic as well as export markets.

## Germany: sesame used in bakery sector, organic market thrives

Germany has a large diversity of breads and high per capita bread consumption. The bakery sector represents 9.7% of the value of the German food and beverage industry, according to [Germany Trade & Invest \(GTAI\)](#), Germany's economic development agency. Products with different grains and seeds [account for 15% of the bread market](#) and sesame is among the widely used seeds in baking. Sesame seeds are commonly used as topping for bread, bread buns and pretzels.

This demand and the large consumer market make Germany the second-largest sesame importer in Europe. Moreover, there is demand for sesame in Mediterranean and Middle Eastern products, which is in part driven by demand from large ethnic communities.

German imports of sesame seeds have grown by an average of 5% annually since 2017. Growth was particularly strong during the COVID-19 years. Part of the imports is re-exported to neighbouring countries. In 2021, the net import was 30 thousand tonnes. The main suppliers to Germany in 2021 were Nigeria, India, Guatemala, the Netherlands – as a trade hub – and Uganda (see Figure 6). On the German market, smaller producing countries are more present than on the Greek market. This offers interesting opportunities for small and medium-sized exporters from developing countries.

Germany is expected to remain a strong consumer market for sesame. It is likely that ethnic food products will contribute to a further growth in demand. Suppliers that can offer organic sesame have an advantage. The German [market for organic food](#) accounts for more than a third of organic sales in the European Union and saw historic growth during the COVID-19 pandemic.

German companies that sell ingredients to the bakery and confectionary sectors, such as the regional [BÄKO cooperatives](#), [Tampico Trading](#) and [Schlüter & Maack](#), are an important target group for sesame exporters. [GB-Foods](#) supplies seeds such as sesame, chia and quinoa to bakers, directly sourced in producing countries. Sesame comes from smallholders in Paraguay. Vegetable oil company [Gustav Heess](#) also sources its sesame seeds directly from farmers in Ethiopia and Uganda.

## Netherlands: sesame popular in bakery products and ethnic foods

The Netherlands is the leading European trading hub, and that also applies to sesame. The sesame imported into the Netherlands is partly processed and consumed domestically, and partly re-exported. Due to its important role as a trading centre, various brokers and importers engaged in the sesame trade are located in the Netherlands.

Imports in 2021 reached 27 thousand tonnes, showing an increase during both COVID-19 years. India used to be the top supplier for years, but dropped from supplying around half of Dutch imports for several years to less than 3% in 2021. This decline was likely driven by European food safety concerns regarding the contamination of Indian sesame. In 2021, the main suppliers to the Netherlands were Nigeria, Uganda, Mexico and Paraguay, jointly accounting for almost two thirds of the supplies (Figure 7).

More than 50% of the imported seeds in 2021 were re-exported to European markets, mainly to Germany, France, Belgium and Italy. The remaining 11 thousand tonnes were used in the Dutch market, mainly as a topping in bakery products or in the preparation of popular ethnic products such as hummus and tahini.

The [market for hummus](#) in particular has grown rapidly in recent years, from sales of around EUR 9 million in 2016 to more than EUR 21 million in 2019. Brands such as [Garden Gourmet](#) (Tivall/Nestlé) and [Maza](#) are commonly found in supermarkets. [Florentin](#) (an organic brand) is available in organic stores. Dutch company Asianuts markets retail and wholesale packages of [Gil's Bio Tahini](#), which is milled in Turkey from organic sesame from Ethiopia and Sudan.

## Poland: traditional confectionery drives sesame consumption

Sesame is a much-used seed in the traditional Polish confectionery industry, which is reflected in consistent import levels. Many popular sesame snacks in Poland include snaps or wafers, called 'Sezamki'. Sezamki, similar to the Greek pasteli, consists of thin layers of sesame and glucose syrup. The Polish version of halwa, the sweet made from crushed sesame, is called 'chalwa'. It has been consumed in Poland for centuries and is widely available in stores. Moreover, sesame is used extensively in different types of bread along with other seeds like poppy.

Over the past 5 years, Poland imported around 14 thousand tonnes of sesame annually, most of it directly from producing countries. The main suppliers to Poland in 2021 were Pakistan, Nigeria, Turkey (as a re-exporter), Somalia and India (Figure 8). The supplier base is more concentrated than for other top European importers: 5 countries accounted for 90% of Polish imports in 2021.

BioVeri has become the largest importer of organic raw and semi-finished products to Poland. It sources sesame directly from farmers in producing countries such as India, Ethiopia and Paraguay. Moreover, it sells sesame products under its own brand CrocCrac.

The long-standing tradition of using sesame in Polish cuisine makes the country a reliable market. Next to traditional sesame products, market forecasts also expect [significant growth](#) in the consumption of ethnic foods such as hummus in the coming years (Figure 9), suggesting new market opportunities for sesame products.

## Italy: sesame is part of Sicilian cuisine

Considering the size of the consumer market, Italy's sesame consumption is still comparatively low. However, consumption is steadily increasing.

Italian sesame imports have shown a high average annual growth rate of 9% over the past 5 years. In 2021, Italy had net imports of 11 thousand tonnes. Brazil was the most important supplier, followed by India and Argentina. The south of the country has a small local sesame production.

As a Mediterranean country with influences from Greece, northern Africa and the Middle East, Italy has potential for further growth. Best-known are classic sesame products from the southern Italian island of Sicily, including the '[biscotti della regina](#)' (reginelle cookies) and sesame nougats called '[giuggiulena](#)' and 'cobaita'. The seeds are also used as a topping on yoghurt or bread. Moreover, supermarkets sell sesame in consumer packaging and as bakery products.

With its use of sesame in classic food culture as well as growing influences from ethnic cuisines, Italy has potential for further growth in sesame consumption. The high growth rates suggest that the market is not yet mature.

## France: sesame consumption stagnates but niche markets offer opportunities

France is a comparatively small market for sesame in Europe. Overall consumption has stagnated over the past 5 years. However, the country offers growth potential in organic and fairtrade niches. France experiences strong growth in the [organic market](#), with a consistent increase in turnover in the last 5 years.

Sesame seeds are used in the bakery sector as a topping on baguettes and other breads. They are also used as an ingredient in various snack products. As in other European countries, ethnic products such as hummus and tahini are gaining in popularity. Sesame is also sold in retail packs for consumers, including several organic products such as the [Markal](#) brand and own brands of supermarkets, such as [Carrefour](#). The social solidarity company [Etiquable](#) sources its organic sesame directly from a cooperative in Burkina Faso.

France imports sesame directly from producer countries as well as from neighbouring European countries, including the Netherlands and Germany. Important producing countries supplying France in 2021 were India, Mali and Nigeria. These 3 countries accounted for around 60% of imports from producer countries.

### Tips:

Critically evaluate the quality of your product. Which market segment seems the best fit? Based on its characteristics and the preferences in different European countries, you can narrow down the most promising markets.

International trade fairs can give you good insights into the market developments and requirements of potential European buyers. 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).

## 4. Which trends offer opportunities on the European sesame seed market?

The European market for sesame shows variations between different countries. Consumption of traditional foods is expected to remain stable. The increasing popularity of ethnic foods, the trend towards healthier food choices and the growing market share of organic products are developments that offer opportunities. Several important supplying countries are struggling with a lack of technology, contamination issues and the impact of internal conflicts. However, the continuous volatility of the sesame market and the large number of producing countries has created flexibility in shifting to other suppliers.

### Thriving non-traditional food sector drives demand for sesame

Ethnic groups have grown across many European countries and have influenced the local food cultures. Non-traditional products have become increasingly popular and are widely available in stores and restaurants. Europe's increasing demand for classic Mediterranean and Middle Eastern products using sesame is expected to drive the expansion of the European sesame seed market also in the coming years. Asian-style foods that use sesame, such as sushi, also remain popular.

A good example of such developments is the chickpea-based hummus spread which uses tahini as a key ingredient. Sales have rapidly increased in recent years, with some producers reporting record growth. Many non-traditional variations of the spread have been added to the market. Forecasts by [Market Research Future](#) foresee another rapid increase with an annual average growth of more than 9% until 2026. Particularly high growth is expected for the United Kingdom and Germany. This rise is also driven by the increasing number of convenience stores.

Niche markets include the use of black sesame in Japanese dishes or ice cream (for example, [Yee Kwan](#) or [Nagomi](#)) or the Japanese condiment [Gomasio](#), made from unhulled sesame and salt (for example, [Terrasana](#) or [Lima Food](#)).

### Health food trend increases demand for seeds like sesame

While it is not a new trend, the European demand for healthier foods has seen another boost during the COVID-19 pandemic. In 2021, [74% of European consumers](#) stated that it is important to them that what they eat is healthy. The shift in consumer eating patterns and changing diet trends towards health-minded consumption

is still ongoing. Sales of plant-based and less processed foods is growing. At the same time, the market for convenience snacks is also seeing strong growth. Both trends offer interesting opportunities for sesame.

Sesame seeds are marketed for their nutritional values. Their protein content is comparable with that of chicken eggs, making them a valuable ingredient in vegan diets. More and more European consumers are looking for alternatives to animal proteins. Moreover, sesame is rich in calcium, magnesium and vitamins and contains healthy fats. According to industry sources, the rising number of patients with high cholesterol and blood pressure who are adding the seeds to their diets is anticipated to create growth in the European sesame seeds market in the next years.

Sesame seeds can be used as a topping for salads, in whole-grain breads and cereals, as well as in snacks. Due to its high calcium and protein content, sesame is a very suitable ingredient in vegan products. The demand for [dairy alternatives](#) is also driven by these dietary changes as well as by increasing occurrences of milk allergies and lactose intolerance. This market is expected to grow by 12.5% annually until 2028. This also offers opportunities for sesame drinks (for example, [Ecomil](#) organic sesame drink powder or organic oat & sesame drink from [Natur Green](#)).

### Tips:

Make sure that you understand the EU labelling guidelines. The EU only allows nutrition or health claims that are clear, accurate and based on scientific evidence. Consult the [EU Register of Nutrition and Health Claims](#) for guidance.

Check the websites of sesame producers and processors and find out how they promote the seeds. Examples include [EverGreen Exports](#) and [HL Agro](#) from India and [Amki Snacks](#) from Poland.

## Risks from allergen status and contamination cases

A risk to the further market expansion of sesame as a healthy ingredient is its status as an important food allergen. Food safety is a key [factor affecting the food purchases](#) that Europeans make (42%), together with taste (45%) and cost (40%).

The cases of contamination in several important producer countries received a lot of attention in the last 2 years. Recent examples include the high residues of the [biocide ethylene oxide](#) in Indian production and recurring cases of salmonella in India, Nigeria and other countries. The multiple product recalls throughout the European Union, Switzerland and the United Kingdom had far-reaching market implications and received broad media attention. These events may reduce European consumer confidence in sesame for a prolonged period of time.


### Tips:

Read the CBI publication [Entering the European market for sesame seeds](#) for more information about allergen labelling requirements.

Read the CBI study on [which trends offer opportunities or pose threats on the European grains, pulses and oilseeds market](#).

Keep track of European market trends for sesame and other seeds by following the regular updates from trader [Dipasa](#).

The website of [EIT Food](#), a European food innovation community, provides insights into the latest thinking around healthy and sustainable food.



[Profundo](#) carried out this study on behalf of CBI.

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