



[Exporting sesame seeds to Europe](#)

Europe is a growing market for sesame seeds. Besides traditional uses in bakery and confectionery, the increasing popularity of products like tahini and hummus drive demand and innovation. The main suppliers to Europe continue to face challenges related to food safety, resulting in import controls becoming stricter. Opportunities in niche segments like organic, functional and health foods and gourmet are expanding and becoming interesting in some markets, but still represent a small share of total demand.

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1 . Product description

Sesame seeds (*Sesamum indicum*) are grown primarily for their oil content. The European market primarily uses sesame seeds for toppings on bakery products such as bread, bagels, hamburger buns and confectionery (sweets). Sesame seeds are also used in snacks, salads (seed, dressings and sauces) and crackers, often in the form of sesame sticks. Restaurants and natural food consumers also purchase sesame seeds for use in food from various cuisines products like tahini and hummus, sushi and Eastern dessert.

Sesame seeds are supplied by countries in Africa, Latin America and Asia. There are different types and qualities of sesame seeds. White seeds are a white-to-golden colour and receive a higher market price than mixed seeds, which range from yellow to dark brown. White seeds are used primarily in natural or hulled form because of their aesthetic value, whereas mixed seeds are generally crushed into oil.

Black sesame seeds are an excellent source of magnesium and calcium and serve very well for non-dairy milk powders and other premium applications. The black seed is smaller than the white seed.

This study focuses on sesame seeds for direct use in food manufacturing and as raw or whole seed (without processing). It does not cover sesame oil.

Sesame seeds (excluding for sowing) are traded under the Harmonised System (HS) code 1207 4090.

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

Sesame seed imports grow to meet European demand

European imports of sesame seeds amounted to 161 thousand tonnes in 2017, at a total value of €226 million. Since 2012, imports suffered small fluctuations and peaked at 163 thousand tonnes in 2015. The 2013–2017 period saw an overall annual growth of around +1.0% in volume and -3% value.

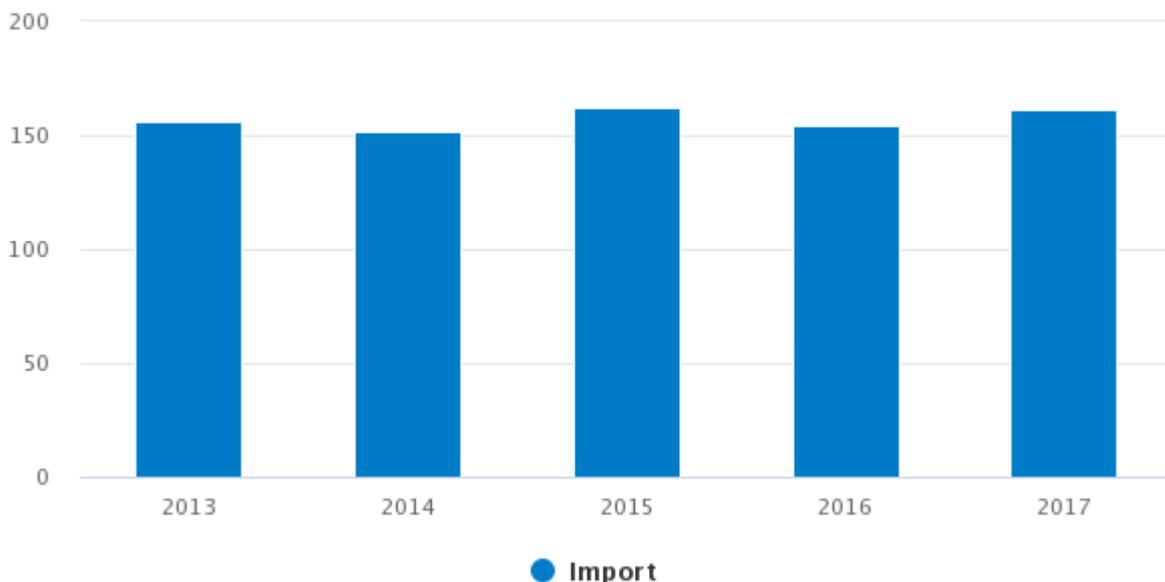
Sesame seeds also enter the market in the form of processed products, which are not accounted for by these statistics.

The apparent consumption of sesame seeds has slightly decreased between 2013 and 2016, registering an average annual decline of -2.3%. In 2016, nearly 119 thousand tonnes of sesame seeds were consumed in Europe. The main consuming countries are Greece, Germany, Poland, France and Italy. These are also, together with the Netherlands, the main European importers of sesame seeds.

Europe registers a very small production of sesame seeds, which happens mainly in Italy (282 tonnes in 2016) and Greece (109 tonnes in 2016).

Figure 1: Imports of sesame seeds to Europe 2013–2017

in 1.000 tonnes



Source: Eurostat, 2018

Germany is the main importer, followed by Greece, the Netherlands and Poland

Germany is the main importer of sesame seeds in 2017, reaching 21% of the imported volume in Europe (33 thousand tonnes, at €48 million). In Germany, sesame seeds are used in many different bread types or as toppings on several snacks (such as pretzels) and pastries. Germany has a large bakery and confectionery sector. [These two sectors account for around 20% of Germany's total food and beverage industry production.](#) The country is also an important trade hub for sesame seeds in Europe, second only to the Netherlands.

In 2017, Greece's sesame seed imports amounted to 31 thousand tonnes (€37 million), having had an annual decrease of -6% in volume since 2013. Sesame seeds are a popular ingredient in

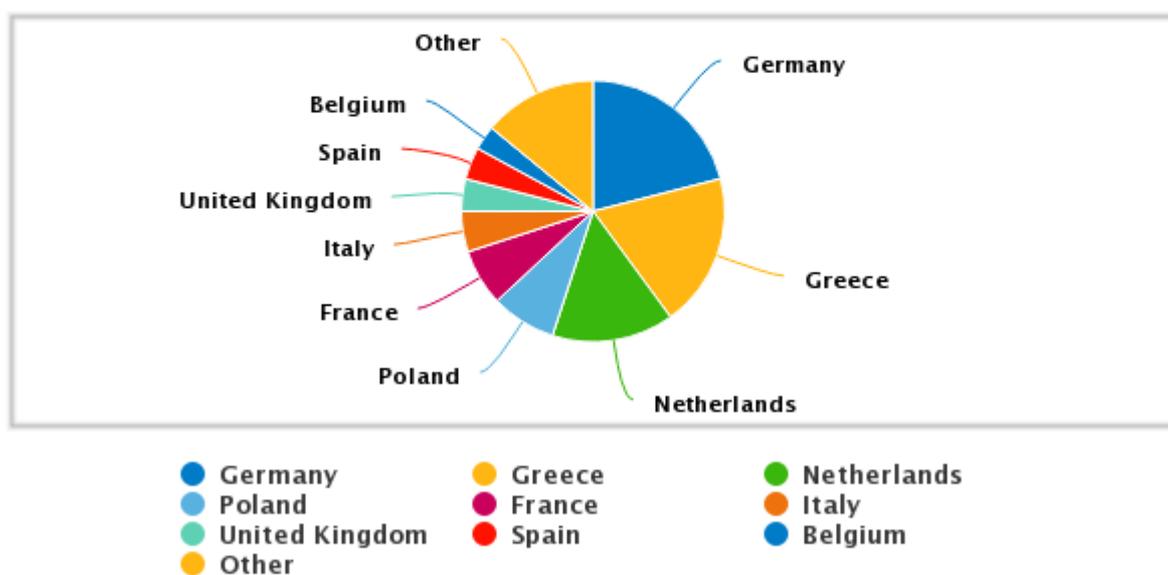
traditional Greek cuisine; they are used in spreads such as tahini and halva as well as in bakery and confectionery products. The sesame industry in Greece withstood the economic crisis, but financial checks are advisable when selecting your buyer.

The Netherlands was the third largest European importer of sesame seeds in 2017. Imports amounted to 24 thousand tonnes (€34 million), and annually decreased in volume by -1% since 2013. The port of Rotterdam is used by a number of large ingredient importers, including [OLAM](#) and [Dipasa](#) (specialised in sesame). Although part of these imports are processed by Dutch food manufacturers, a significant share is re-distributed to other European countries. In 2017, Dutch exports of sesame seeds amounted to nearly 19 thousand tonnes (€33 million), more than half of the total European exports.

Poland also plays a significant role in European imports, accounting for an 8% share in 2017. Imports totalled 13 thousand tonnes (€17 million), with an annual increase of 4% since 2013. The Polish cuisine is famous for its different types of bread among which several seeds such as poppy and sesame seeds are extensively used. The influence of different sesame seed-using cuisines in Poland and the high consumption of bakery products makes the Polish market very interesting for sesame seed exporters. Poland also supplements supplies to Germany and fuels its neighbouring markets such as Czech Republic and Hungary.

Figure 2: Main European importers of sesame seeds 2017

in % of total imported volume



Source: Eurostat, 2018

European imports mainly come directly from developing countries

Around 77% of the European imports of sesame seeds were sourced directly in producing countries in Asia, Africa and Latin America. Read more about these supplies on the section below: What competition do you face on the European market for sesame seeds?

The remaining 23% entered the market through trade hubs, mainly the Netherlands and Germany, and was distributed to other European markets. Germany itself is the main destination of European re-exports, holding 28% of the market, followed by France (13%) and Poland (6%).

Tips:

- Compile your own trade statistics and analyse your results. Using databases such as [ITC Trade Map](#) and the [European Trade Helpdesk](#). The trade statistics for sesame seeds can be

found under the Harmonised System (HS) code 1207 4090

- Develop a market information system for your company, in order to support decision-making. Websites you can use for information about the agricultural and oilseeds market are: [Agribusiness intelligence](#), [Index Mundi](#) and [Oil World](#).

3 . What trends offer opportunities on the European market for sesame seeds?

Next to the trends below, do not forget to read trends shaping the oilseeds sector. They will provide important insights into general market developments.

The mainstreaming of non-traditional foods fuels European demand for sesame

Tahini, hummus (which uses tahini) and halva are three products which use sesame seeds as an ingredient. These non-traditional products are becoming increasingly popular in Europe. For example, [two in five households in the United Kingdom are said to have a pot of hummus at home](#).

The market for international cuisines in countries like the United Kingdom [has a much longer history than in other West European countries](#) like Spain and even Germany. That has not halted the mainstreaming of non-traditional products using sesame seeds. In fact, [Germany is seeing a strong increase in consumption of hummus](#), for example.

Niche products such as black sesame ice cream (example: [YeeKean Honest](#)) and the condiment Gomasio (sesame salt; example: [Eden Foods](#)) are also becoming more popular. Similarly, the expansion of non-traditional cuisines such as Korean food also allows for the introduction of dishes containing sesame seeds ([BigHospitality, 2015](#)), thus providing opportunities in the food service segment.

Sesame seeds are trendy in new product launches

Following the health and wellness trend as described in [our study on oilseeds trends](#), there has been a steady increase in product launches in Europe using sesame seeds. The nutritional characteristics of sesame seeds are especially attractive due to its vitamin, mineral, fibre, healthy fat and protein content.

As reported by Food Innovation Solutions, this is [a growing market with room for innovation, often including raw foods with a low fat, low sugar and high protein content](#). For example, cereal bars like sesame honey energy bars (example: [Sunita Fine Foods](#)) are high on demand. Innovations like [ready-to-use \(organic\) tahini](#), [snack options with black sesame](#) and [sesame milk](#) also boost the market and combine convenience and non-traditional food.

Tip:

- Promote the high nutritional value of sesame seeds and the product's various applications. It is essential to provide analysis of the product to quantify the content of important (micro) nutrients.

4 . What requirements should sesame seeds comply with to be allowed on the European market?

European buyers have strict requirements for food ingredients. You can only export sesame seeds to Europe if you comply with these requirements. In our study on [buyer requirements for oilseeds](#) you can find an analysis of the requirements for oilseeds. They are specified for sesame seeds below.

Legal requirements

The legal requirements for sesame seeds in Europe mainly deal with food safety. Traceability and hygiene are the most important themes covered by legislation.

Special attention should be given to specific contamination sources that sesame seeds are exposed to:

Salmonella contamination is one of the main risks. The 2001 salmonella outbreak in Germany [caused by contaminated sesame seeds found in halva](#) caused European authorities to tighten food safety provisions. But contamination cases still occur, and greatly affect the image of supplying countries. Recently, [a new type of Salmonella serotype was found in sesame products in 4 European countries](#), reaffirming the need for further health controls. As of February 2017, for example, [Indian sesame seeds are subject to stricter controls](#) to enter the European Union.

Contamination of sesame seeds by fungus (example: Aflatoxin) [is also possible](#), but less common than Salmonella.

Pesticide residues are also a possible problem to suppliers, who will need to conform to the [maximum levels established by the European Union's legislation](#). For organic sesame seeds, pesticide residues are not tolerated. Read more about organic certification in the sections below.

Attention should also be drawn to insect infestation, excrement residues and other external sources such as metal and plastic pieces.

Tips:

- Check the website of [Rapid Alert System for Food and Feed \(RASFF\)](#). There you can see various border rejections and alerts for 'sesame seed' under the category 'nuts, nut products and seeds'. That's how you can learn about common problems faced by suppliers during border controls and adopt appropriate measures to avoid similar problems.
- Take the appropriate pre- and post-harvest measures needed to avoid the occurrence of Salmonella, Aflatoxin and other sources of contamination in your seeds. [The Empres Food Safety Guide](#) (in FAO's website) regarding prevention and control of Salmonella and *E. coli* is a good point of departure.
- Be familiar with [FEDIOL's Hygiene Guides](#), including set procedures dealing with salmonella and other sources of contamination.

Additional buyer requirements

Food safety

You can expect buyers to request extra food safety guarantees from you, such as the implementation of good agricultural practices and Quality Management Systems (QMS) regarding the production and handling processes.

Buyers commonly require their suppliers to have a quality/food safety management system in place. These systems require companies to demonstrate their ability to control food safety hazards in order to ensure that food is safe at the time of human consumption.

Suppliers can apply a basic Hazard Analysis and Critical Control Points (HACCP) system. However, if you aim to supply food manufacturers, it is necessary to have a certified recognised food safety management system such as [ISO 22000](#), [British Retail Consortium \(BRC\)](#) or [International Featured Standards \(IFS\): Food](#).

Tip:

- Visit the website of the [Global Food Safety Initiative](#) for more information on food safety and quality management standards.

Quality requirements

Some of the most important quality factors concerning sesame seeds are: colour, odour, flavour, oil content, moisture content, size, uniformity of seeds, purity and damaged/mouldy seeds. Sesame seeds should also be free from mycotoxins and harmful microbiological activity. Salmonella and Aflatoxin contamination are known to be a problem for many producers, and buyers closely monitor these aspects.

The minimum quality requirements for sesame seeds will depend greatly on the end-product the seed will be used for. For example: Tahini needs a sweet taste and aroma, and sesame seeds from some origins are not suitable for this use. For bakery purposes, very high purity levels are required, and some suppliers might not be able to reach these levels. In sesame oil, clarity is important, also requiring sesame seeds with the appropriate characteristics. The use of either natural or hulled sesame seeds will also depend on the end-product.

Tips:

- Make sure that the sesame seeds are fresh and that there are no long delays between harvesting and transportation. Sesame seeds should also be free from sand, stalk, plant debris and other foreign materials.
- Make sure your product characteristics and quality match your target market and end-user in: 1) taste and odour, 2) oil content, 3) purity level & uniformity, 4) hulled/natural. For example, the confectionery industry normally demands hulled sesame seeds at a very high purity level. Each customer has its own specifications and interpretations; normally exporters work with different grades, with normally 99.5, 99.98 as highest grades (or even 99.99 for black sesame seeds).
- Keep different types of sesame seeds separate, that is: do not mix seeds from different origins.

Labelling requirements

Labelling should ensure traceability of individual batches, containing:

- Product name
- Manufacturer's lot or batch code

- Indication if the product is destined for use in food products
- Name and address of exporter
- Product's country of origin
- Shelf life: best before date/use by date
- Net weight/volume in metric units
- Recommended storage conditions
- *Organic (if relevant)*: Name/code of the certifying body and certification number

Use the English language for labelling unless your buyer has indicated otherwise.

Packaging requirements

Sesame seeds for the European market are transported in containers in multi-wall paper sacks, bags of woven natural materials (example: jute) or woven plastic polypropylene / polyethylene (PP/PE) bags. Buyers may have specific additional packaging requirements. They are usually shipped in containers with a capacity of between 16 and 19 tonnes, and in 25kg or 50kg bags.

Organic sesame seeds should remain physically separated from conventional sesame seeds.

Figure 3. Packaging options for sesame seeds: Multi-wall paper sacks, PP bags, jute bags



Sources: Honeyville, IMEXA, Eurojute

Tips:

- Ensure preservation of quality by: 1) Thoroughly cleaning and fumigating the holds or containers before loading the seeds, 2) Protecting the cargo from moisture during loading to avoid mould, spoilage and self-heating, 3) Ensuring appropriate temperature, humidity/moisture and ventilation conditions during transportation, 4) Protecting the cargo from pests such as beetles, moths, etc.
- Read more about the transportation and quality assurance of sesame seeds on the website of [Cargo Handbook: Sesame seed](#)

Corporate social responsibility and sustainability

Corporate responsibility and sustainability are growing in importance in the oilseeds sector. This is also reflected onto companies handling sesame seeds. Adopting codes of conduct or sustainability policies related to environmental and social impacts of your company can provide you with a

competitive advantage.

Leading companies on the oilseed market such as [OLAM](#) and [Van der Does Spice Brokers](#) have sustainability policies emphasizing the contact with producers, transparency in their operations, as well their social and environmental impact. However, aspects related to sustainability, social and environmental impact for sesame seeds are less developed than for products like [coffee](#) and [cocoa](#) or other seeds such as [chia](#) and [quinoa](#).

Tips:

- Most buyers are prepared to work with you toward compliance, provided you show interest and willingness. The first step is often a simple statement of intent or a policy on a particular aspect, for example, a policy stating that you will not employ workers under the legal age in your country.
- Implementing a management system such as [ISO 14000](#) (environmental aspects), [OHSAS 18001](#) (occupational health and safety) or [SA 8000](#) (social conditions) is a way to address sustainability and possibly gain a competitive advantage. Investigate and inquire with your (potential) buyer whether such certificates (and which ones) are appreciated. Note that these are price competitive markets, so every certificate system you implement may attract a different type of buyer but may also make you less price competitive.
- Investigate whether your buyer requires extra certificates such as [Non-GMO](#) or [gluten-free](#).

Requirements for niche markets

In general, the market for organic sesame seed is still a niche segment. It could be especially interesting in countries which have a large organic bakery sector. [Bread and bakery products have market shares of up to 10% in the organic ranges of Switzerland, the Netherlands, France, Sweden, Finland, and Germany.](#)

If you do choose to obtain a certificate for organic production, find out more about [Organic production and labelling](#).

Fairtrade Labelling Organisations International (FLO) is the leading standard-setting and certification organisation for Fairtrade. Products which carry the Fairtrade label indicate that producers are paid a Fairtrade minimum price. FLO has a minimum price for sesame seed. Other fair trade standards available in the European market are Fair Trade Ecocert and the Institute for Marketecology's Fair for Life.

Tips:

- Make sure that your organic certification is harmonised with the [European Union legislation](#). The European Union has established requirements on the production and labelling requirements with which an organic product of agricultural origin must comply in order to be marketed in Europe as "organic".
- Read the publication [The World of Organic Agriculture 2017](#) to learn more about the main European markets for organic products.
- Before engaging in a Fairtrade certification programme, make sure to check (in consultation with your potential buyer) that this label has sufficient demand in your target market and whether it will be cost beneficial for your product.

- Although [FLO](#) certification is the leading fair trade certification scheme in Europe, you can also check out other schemes such as [Fair for Life](#) and [Ecocert Fair Trade](#).
- See our study on [buyer requirements for the oilseeds market](#) for more information.

5 . What competition do you face on the European market for sesame seeds?

India is the largest supplier of sesame seeds to Europe, accounting for 53% of the total imports coming directly from producing countries. Between 2013 and 2017, Indian supplies to Europe have increased at an average annual rate of 6% since 2013. However, the role of Indian exports is declining in the long run due to the increasing pressure on land and rising domestic consumption. A general shift in sesame production from India (and China) to Africa is being witnessed in the international market. This will open further space for African suppliers of sesame seeds in Europe.

In 2017, European imports of sesame seeds sourced in Sudan amounted to 16 thousand tonnes (€17 million), making Sudan the second largest supplier to Europe. Nigeria is the third largest supplier to Europe, with also nearly 16 thousand tonnes (€18 million). A large share of these imports are operated by multinational [Olam, which has significant sourcing activities in Nigeria](#).

In spite of a dominant position on the European market, both [India](#) and [Nigeria](#) face serious reputation problems and tighter controls due to contaminated sesame seeds.

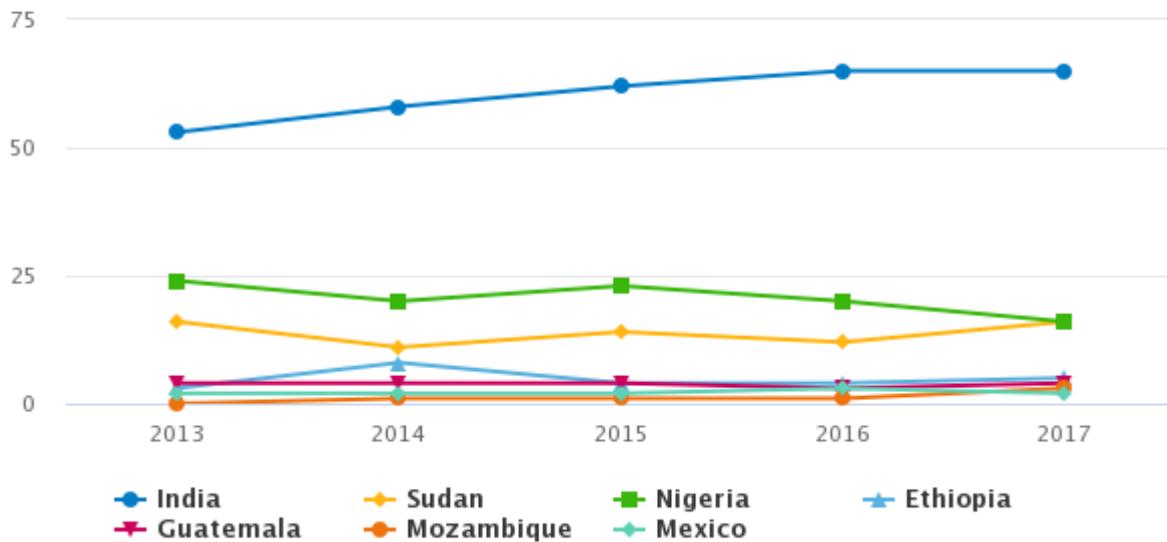
Furhermore, Ethiopia and Mozambique are also important suppliers of sesame seeds to the European market. In 2017, Ethiopia accounted for around 4% of the total European supplies coming directly from producing countries; Mozambique accounted for a 2% share. Ethiopian supplies to Europe experienced a significant annual growth of 8% in volume and 3% in value since 2013. Mozambican supplies sharply increased with 82% since 2013.

In Latin America, Guatemala and Mexico are the largest suppliers to Europe. In 2017, sesame seeds exported from Guatemala accounted for 3% of total European imports. Mexico had a 2% share. The development of these two suppliers since 2013 has been different, with an increase in imports coming from Mexico (+11% in volume) and a decline in imports coming from Guatemala (-5% in volume).

A decrease in supply could, for instance, be a result of a high incidence of contract default. As described in our study on [Doing Business with European oilseeds buyers](#), keeping your promises is one of the most important factors in creating sustainable business partnerships and maintaining your reputation.

Figure 4: Main developing country suppliers of sesame seeds to Europe 2013–2017

in 1.000 tonnes



Source: Eurostat, 2018

Tip:

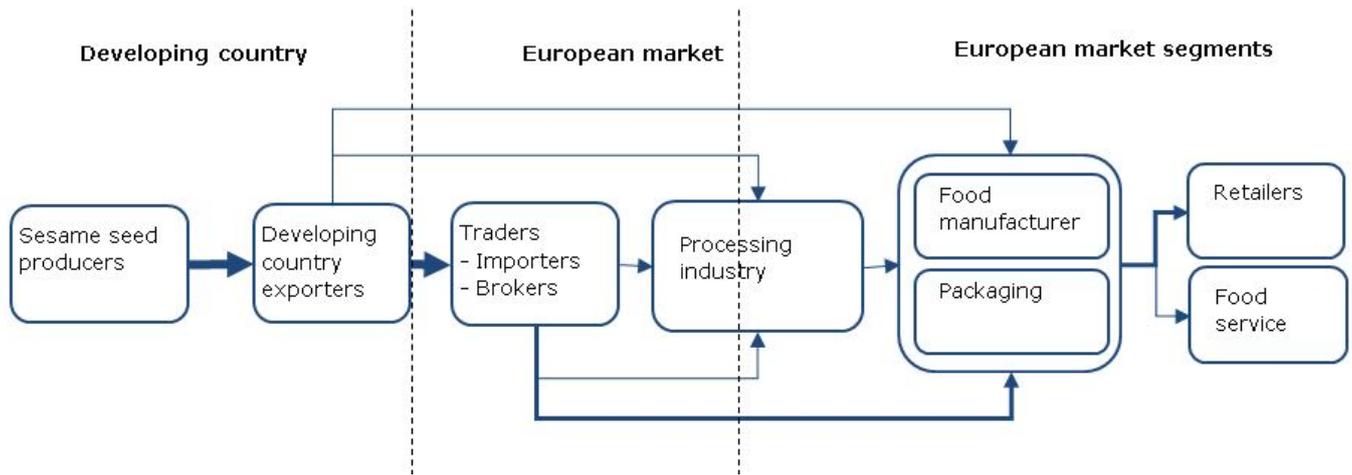
- Identify your potential competitors and learn from them in terms of: 1) Marketing: website, social media, trade fair participation, etc. Examples of well-structured websites are: [HL Agro \(India\)](#), [Sun Agro \(India\)](#), [Sesajal \(Mexico\)](#), [ETG \(Kenya\)](#), [Sindan Organic \(Bolivia\)](#). 2) Product characteristics: origin, variety, quality, purity, oil content, etc. 3) Value addition: certifications, further processing (examples: hulling, cleaning, toasting).

6 . Through what channels can you get sesame seeds on the European market?

Within the European food sector, sesame seed trade channels and segments revolve around their end use:

- The crushing industry uses sesame seeds to produce sesame oil for food and cosmetics. FEDIOL figures indicate [that sesame-crushing activities in Europe are not significant](#). Sesame oil is usually imported into Europe in its crude form. You can read [our studies on sesame oil](#) to learn more about this market.
- The food processing industry uses sesame seed in products such as breakfast cereals, snack bars and confectionery (sweets). It also relates to direct consumer products from seed, paste and oil, such as hummus and dressings. These industries source mostly through importers, although some larger industries source directly from developing country exporters.
- Sesame seeds are also consumed as a raw or whole seed (without processing), as a topping in salads and non-traditional dishes like woks.
- Sesame seed meal can also be used in the animal feed industry (not included in this study).

Figure 5. Trade channels for sesame seeds in Europe



Importers remain the main market entry channel; direct trade grows

Market entry for exporters of sesame seeds does not differ significantly from other oilseeds as described in [our study on channels and segments for oilseeds](#).

Exporters of sesame seeds in developing countries mostly sell their products to importers. Sometimes agents or brokers such as [BB Nuts \(Greece\)](#), [Van der Does Spices](#) and [Anabela Foods \(Germany\)](#) are involved. Examples of importers in the main European markets are:

- [Dipasa - Netherlands](#)
- [JKT Foods - Netherlands](#)
- [H. A. & Gustav K uchler - Germany](#)
- [August T pfer & Co. - Germany](#)
- [Partner Trade - Poland](#)
- [Atlanta - Poland](#)
- [Free World Trading - United Kingdom](#)

Some importers are specialised in the market for organic food ingredients, for example:

- [Tradin Organic - Netherlands](#)
- [Do-It - Netherlands](#)
- [Rapunzel - Germany](#)

Direct trade with end-use industries such as crushers or food manufacturers is an option for more advanced exporters. It is a growing market channel in the oilseed sector. Manufacturers with integrated importing operations are, for example:

- [Haitoglou Bros S.A. \(Greece\)](#)
- [Intersnack \(Netherlands\)](#)
- [Bioveri \(Poland\)](#)

Tips:

- Analyse your market entry options and think about the channel which is most suitable to your own specific strengths, needs and objectives.
- If you are able to supply directly to food processors or crushers in terms of volume and ensure consistent delivery and quality, make sure you have adequate quality control systems as described under 'Additional requirements' above. Make sure to consult your (potential) buyers on the certifications they require.
- If you are dealing with smaller volumes or specialised seeds, importers or brokers are quite often the most suitable entry point.
- If you are a new exporter or new to export, brokers can facilitate your market entry process in Europe, enabling you to find and connect you to the most suitable buyer.

- Meet specific quality requirements when targeting the consumer market: uniformity in colour and shape (whole seeds) and a high purity level are key.
- Comply with sustainability standards required by your specific segment and stay up-to-date on developments in this respect.
- See our study on [Market Channels and Segments for Oilseeds](#) for more information.
- See our study on [Finding Buyers on the European oilseeds market](#).

7 . What are the market prices for sesame seeds?

Price levels for sesame seeds from different origins show similar developments, thus indicating a price interdependency between the various global suppliers. In addition, the international market strongly depends on the annual volumes produced in both India and China. China produces large quantities of sesame seeds each year to meet the substantial domestic demand for sesame seeds. Any delay or failure in Chinese crops puts a constraint on the global availability of sesame seeds, which has an impact on price levels as well.

In the end of 2012, sesame seed prices reached levels between USD 2,000 and USD 2,500 per tonne, depending on origin and quality. This was followed by a strong decline in 2014 and 2015, with prices ranging between USD 1,200 and USD 1,500 because of poor Chinese demand and good production levels worldwide.

In the start of 2016, prices decreased even more to USD 800-900 per tonne mainly due to weaker demand and strong supply worldwide. In late 2016 and 2017, prices have picked up to around USD 1,000 per tonne in India, [influenced by lower production](#). However, competition from other producing countries threatens price stability.

Tips:

- Develop sustainable relationships with buyers in order to benefit from the current international scenario for sesame seeds over the long term.
- Develop good market information systems so as to be aware of market movements in sesame seeds worldwide.

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