



# USA Sesame Industry Production & Consumption Trends

December 10, 2020



# Agenda

1. Sesaco Corporation
2. US Sesame Market Overview - Production & Consumption
3. Market Segments
4. Supplier by Segment
5. Growth Drivers & Market Considerations

# Sesaco Corporation

We operate a fully integrated sesame supply chain from seed development through ingredient sales

## Sales

Development of global market channels for US grown sesame.

## Variety Development

Breeding of next generation varieties designed to optimize farm & market performance. Patent protected.

## Ingredient Manufacturing

Full-line tahini manufacturing facility with robust product development and quality controls. GFSI certified.

## Crop Production

Secured production through an established network of producers & service providers.

## Seed Processing

Modern efficient seed cleaning facility with robust quality controls. GFSI certified.

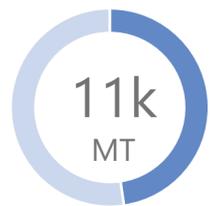
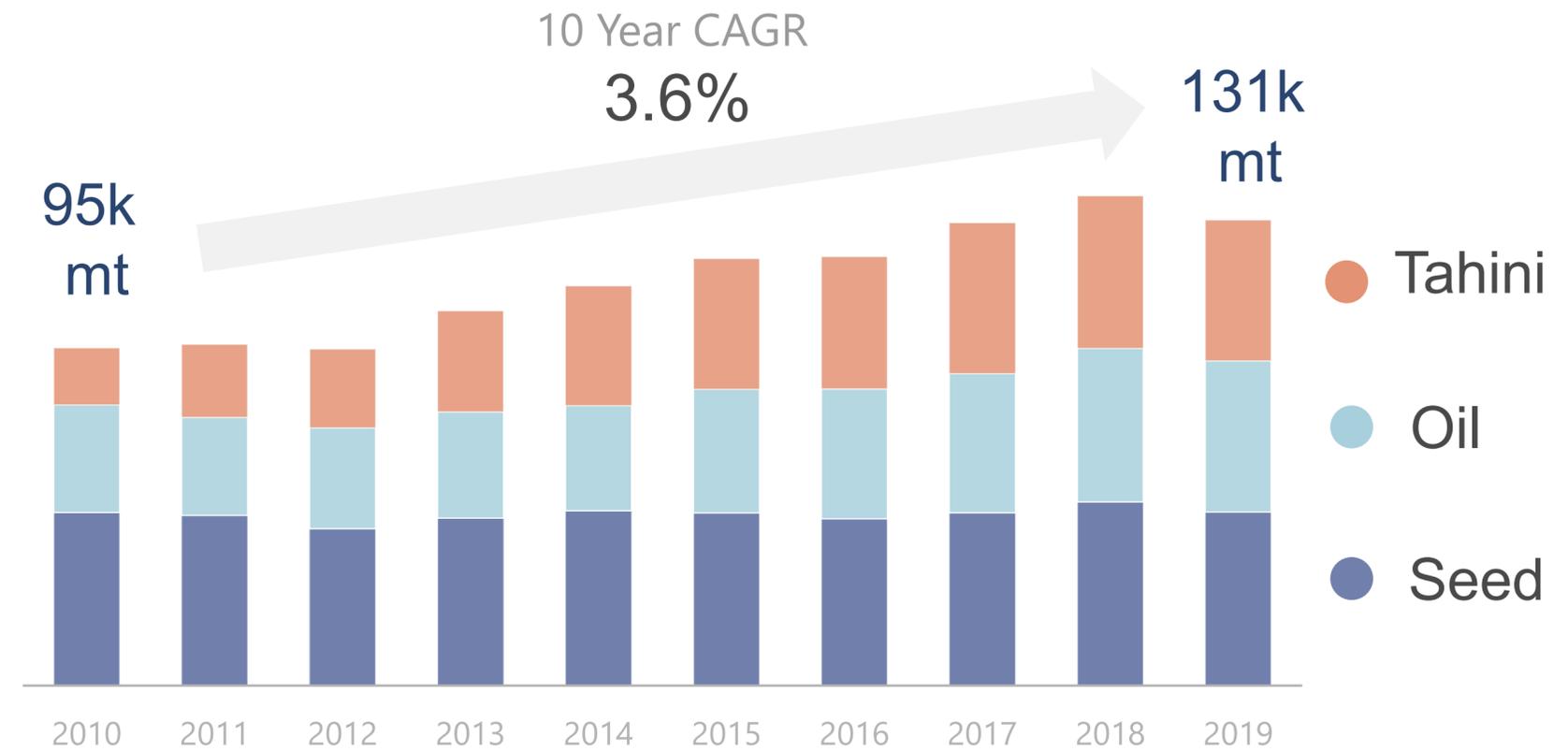
## US logistics & supply chain

Fully traceable supply chain with just-in-time logistics.



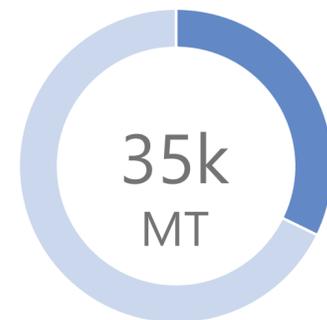
# USA Sesame Market Overview

Production & consumption of sesame is expanding in the USA

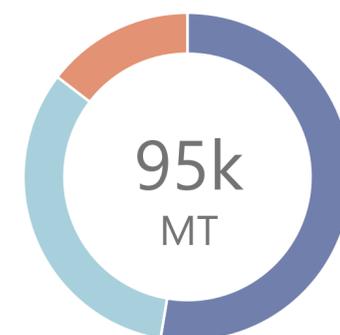


2010

USA Production has increased 3-fold but only 1/3 is consumed domestically

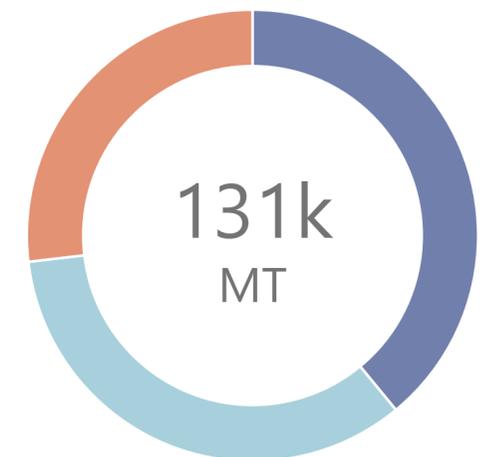


2019



2010

Market size has increased 37% with consumption shifting to ingredient applications



2019

\*\* All volumes calculated are on a seed basis

# Market Segments

The USA sesame market is being driven by the growth in demand for sesame ingredients

## Sesame Seed

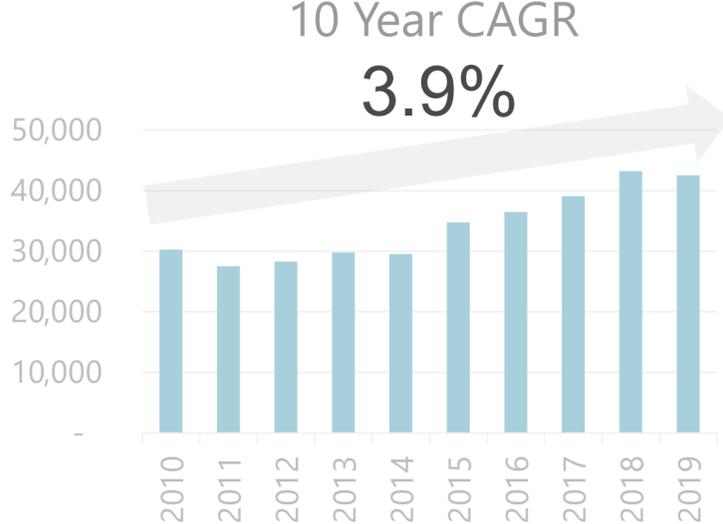
Sesame seed is used primary in bakery applications. Growth is flat to declining.



**49k**  
MT

## Sesame Oil

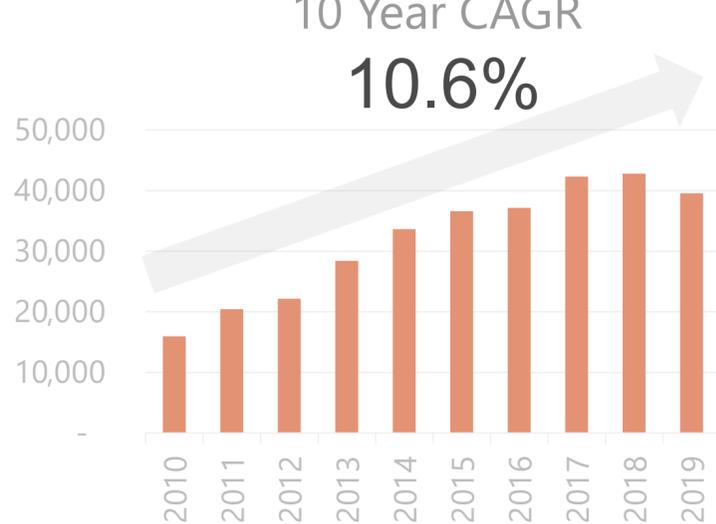
Sesame oil market continues to increase for specialty Asian applications.



**43k**  
MT

## Sesame Tahini

Tahini has seen dramatic growth driven primarily by the hummus segment.



**39k**  
MT

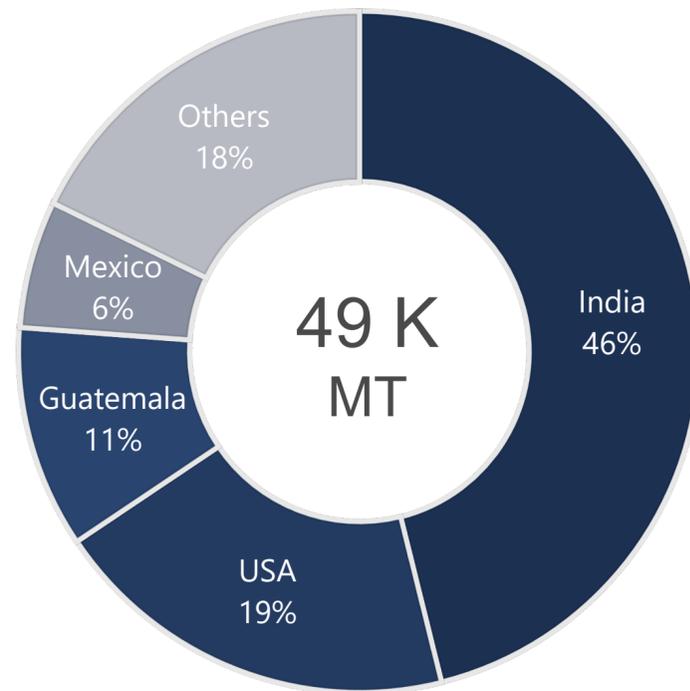
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# Suppliers by Segment

Approximately 90% of the sesame consumed in the USA is imported

## Sesame Seed

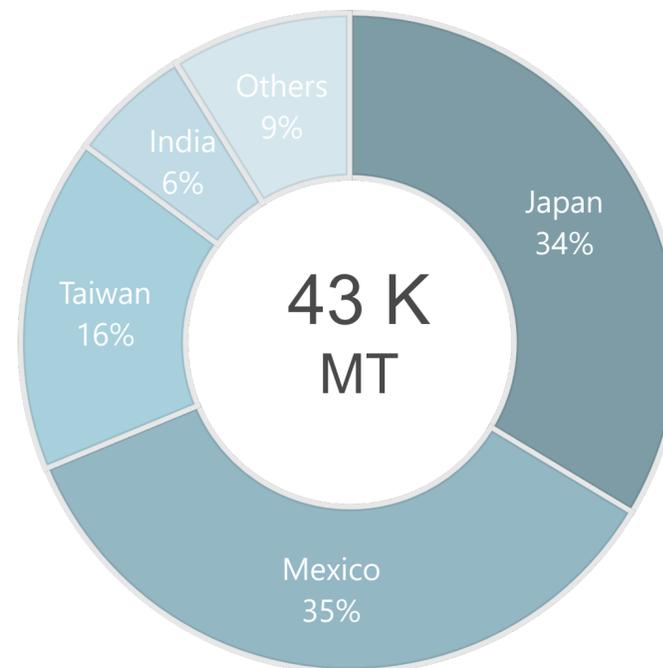
India dominates the Hulled market, but USA manufacturers have a solid position in the Natural market.



USA 19%  
Import 81%

## Sesame Oil

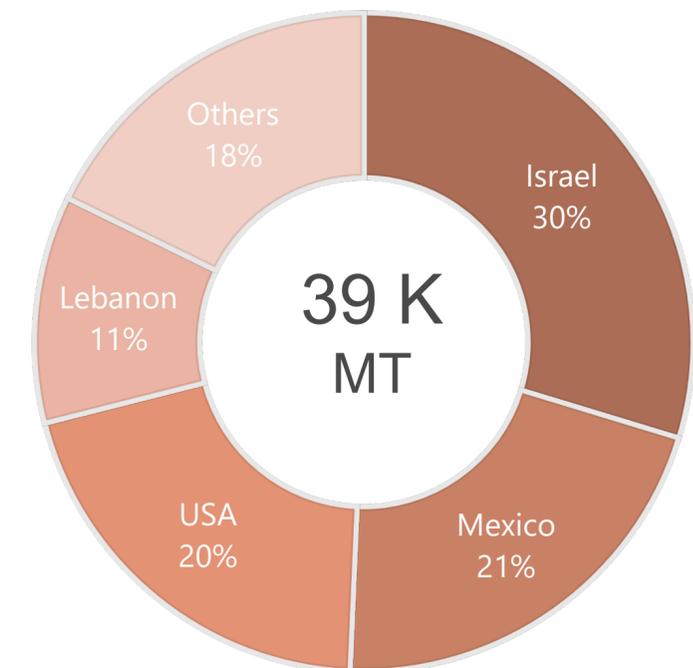
Japan has a secure position in the traditional premium market while Mexico is growing the segment.



USA <3%  
Import +97%

## Sesame Tahini

Israel & Mexico dominate, but USA manufacturing capacity is increasing.



USA 20%  
Import 80%

\*\* All volumes calculated are on a seed basis

# Growth Drivers & Market Considerations

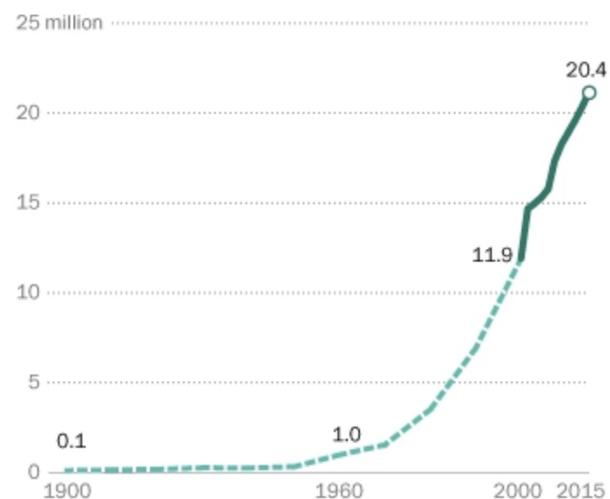
Sesame aligns well with changing consumer dynamics and is well positioned as an ingredient for further increases in US consumption

## Consumer eating habits

- Shifting demographics with increasing Asian & Middle Eastern populations (traditional sesame consumers)
- Increasing interest in healthy foods
- Increasing interest in Ethnic Cuisines & Global Flavors (among traditional US consumers)

### The Asian population in the U.S. has grown 72% since 2000

*In millions*



Source: Pew Research Center analysis of U.S. Census Bureau data. See methodology for more details.

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## Social Interest

- Increasing emphasis on sustainability
- Increasing demand for transparency and shorter supply chains



## Regulatory

- Changes in US regulations that strengthen the requirements for food safety (FSMA) and increases the liability of importers
- Allergen labeling is not expected to significantly impact demand



# Thank you!

