



Highlights of



WORLD SESAME & PEANUT

CONFERENCE

**3-5 Sept 2023, Jordan
Movenpick Resort & Spa Dead Sea**



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Keynote Address

Key Trends Shaping Global Sesame Crop & Market

Mr Tarun Chawla, Export Trading Company



SUPPLY: Northern Hemisphere

Nigeria / Niger

Supply Peak: Supply has peaked, but USD demand for imports can support Sesame exports.

Sanctions/Threats: The Nigerian government could increase sanctions and impact on moving sesame from Niger to Nigeria through road transport

Burkina / Togo / Mali

Range Bound: Range bound impacted by political disturbances.

Ethiopia

Post War Disturbances: Export is to earn \$'s to pay for import bills & support that business.

Key markets Europe and Israel: Shift of focus.

Regulations: Frequent Changing Policies.

Sudan

Uncertain Sudan: War has caused a big disaster. Khartoum, once a vibrant city has turned into rubble. A major dent in the supply uncertainty.

SUPPLY: Southern Hemisphere

Tanzania

Range Bound: Range bound Supplies.

Auctions dominate now.

Importers: Importers direct participation in Auction.

Role of an exporter?

Mozambique

Border Trade: Border countries contribute. Malawi and Zimbabwe supplies.

Northern Area: Northern area supplies have been reduced.

Uganda

Organic: Organic trade has done well in the EU. One of the largest from Africa.

Highlights of World Sesame & Peanut Conference - 2023

SUPPLY: Asia & Others

India

Summer Crop: The summer crop has become a sizeable crop.

Winter Crop: Winter crop 3 years of Lanina & 4th year of returns of competing crops pressure.

Pakistan

Major Supply: Emerged in the last 4 years as a major supplier & an important player in the Sesame world. Supply can reach or possibly exceed 200k in time to come.

DFT: It has increased exports to China.

Weather Impact: Erratic.

China

Local Crop: It was diminishing & losing relevance when this year they came strong because of higher prices & low returns in other competing crops.

Brazil

Mechanized Farming: The sesame farming is through use of shatter resistant seeds.

Inter Crops: An additional earning source as it is planted between two crops.

Turkey and India: Major export markets.

Supply Disruptions | Weather Anomalies

| Year | DJF | JFM | FMA | MAM | AMJ | MJJ | JJA | JAS | ASO | SON | OND | NDJ |
|------|------|------|------|------|------|------|------|------|------|------|------|------|
| 2011 | -1.4 | -1.2 | -0.9 | -0.7 | -0.6 | -0.4 | -0.5 | -0.6 | -0.8 | -1.0 | -1.1 | -1.0 |
| 2012 | -0.9 | -0.7 | -0.6 | -0.5 | -0.3 | 0.0 | 0.2 | 0.4 | 0.4 | 0.3 | 0.1 | -0.2 |
| 2013 | -0.4 | -0.4 | -0.3 | -0.3 | -0.4 | -0.4 | -0.4 | -0.3 | -0.3 | -0.2 | -0.2 | -0.3 |
| 2014 | -0.4 | -0.5 | -0.3 | 0.0 | 0.2 | 0.2 | 0.0 | 0.1 | 0.2 | 0.5 | 0.6 | 0.7 |
| 2015 | 0.5 | 0.5 | 0.5 | 0.7 | 0.9 | 1.2 | 1.5 | 1.9 | 2.2 | 2.4 | 2.6 | 2.6 |
| 2016 | 2.5 | 2.1 | 1.6 | 0.9 | 0.4 | -0.1 | -0.4 | -0.5 | -0.6 | -0.7 | -0.7 | -0.6 |
| 2017 | -0.3 | -0.2 | 0.1 | 0.2 | 0.3 | 0.3 | 0.1 | -0.1 | -0.4 | -0.7 | -0.8 | -1.0 |
| 2018 | -0.9 | -0.9 | -0.7 | -0.5 | -0.2 | 0.0 | 0.1 | 0.2 | 0.5 | 0.8 | 0.9 | 0.8 |
| 2019 | 0.7 | 0.7 | 0.7 | 0.7 | 0.5 | 0.5 | 0.3 | 0.1 | 0.2 | 0.3 | 0.5 | 0.5 |
| 2020 | 0.5 | 0.5 | 0.4 | 0.2 | -0.1 | -0.3 | -0.4 | -0.6 | -0.9 | -1.2 | -1.3 | -1.2 |
| 2021 | -1.0 | -0.9 | -0.8 | -0.7 | -0.5 | -0.4 | -0.4 | -0.5 | -0.7 | -0.8 | -1.0 | -1.0 |
| 2022 | -1.0 | -0.9 | -1.0 | -1.1 | -1.0 | -0.9 | -0.8 | -0.9 | -1.0 | -1.0 | -0.9 | -0.8 |
| 2023 | -0.7 | -0.4 | -0.1 | 0.2 | 0.5 | 0.8 | | | | | | |

BLUE: La Nina

RED: El Nino

- Frequent weather anomalies
- Three consecutive La Nina years now followed by a El Nino
- El Niño is anticipated to continue through the Northern Hemisphere winter (with greater than a 95% chance through December 2023-February 2024).*

SUPPLY: Major Origins

| Origins\Year | 2015-16 | 2016-17 | 2017-18 | 2018-19 | 2019-20 | 2020-21 | 2021-22 | 2022-23 |
|-------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Tanzania | 140 | 95 | 90 | 75 | 127 | 140 | 125 | 110 |
| Mozambique | 47 | 47 | 65 | 65 | 92 | 120 | 105 | 80 |
| China (Exp) | 24 | 35 | 32 | 35 | 35 | 30 | 30 | 25 |
| Pakistan | | | 16 | 44 | 16 | 87 | 110 | 120 |
| India (Exp) | 264 | 292 | 350 | 250 | 290 | 250 | 230 | 230 |
| Ethiopia | 409 | 290 | 285 | 220 | 260 | 180 | 130 | 160 |
| Sudan | 170 | 292 | 385 | 330 | 380 | 270 | 280 | 300 |
| Uganda | 30 | 16 | 20 | 25 | 20 | 20 | 20 | 20 |
| Nigeria Niger | 272 | 277 | 265 | 280 | 305 | 350 | 450 | 330 |
| Burkina Mali Togo | 200 | 126 | 120 | 195 | 185 | 220 | 170 | 140 |
| Total | 1,556 | 1,470 | 1,628 | 1,519 | 1,710 | 1,667 | 1,650 | 1,515 |

- Global trade/exports from major origins has been in the range of 1.5 to 1.7 Million Metric Tons.
- Last season 2022-23. Supplies of entire Northern Hemisphere crops reduced
- Sudan is a major exporter/supplier & it's absence from trade will be felt in the coming season.

Demand: China

| Origin\Year | 2018 | 2019 | 2020 | 2021 | 2022 |
|----------------------------|----------------|----------------|------------------|------------------|------------------|
| Ethiopia | 160,945 | 112,470 | 146,102 | 121,191 | 73,909 |
| Sudan | 254,935 | 171,131 | 231,132 | 148,747 | 170,903 |
| Togo | 101,227 | 109,129 | 112,178 | 165,049 | 113,935 |
| Mali | 17,723 | 39,736 | 52,299 | 37,749 | 19,907 |
| Burkina Faso | 57 | 57 | 1,700 | 13,756 | 18,250 |
| Niger | 141,814 | 155,567 | 177,642 | 297,784 | 209,787 |
| Nigeria | 2,204 | 3,499 | 3,741 | 4,681 | 4,681 |
| Tanzania | 57,749 | 108,861 | 139,873 | 110,539 | 103,665 |
| Mozambique | 52,617 | 78,675 | 103,050 | 65,804 | 113,381 |
| Pakistan | 3,024 | 2,734 | 9,341 | 92,517 | 84,985 |
| Myanmar | 7,524 | 7,997 | 455 | 65,815 | 108,106 |
| Uganda | 13,558 | 9,188 | 15,079 | 12,503 | 12,111 |
| Others | 14,501 | 13,344 | 23,477 | 38,194 | 37,368 |
| Total China Imports | 827,878 | 812,387 | 1,016,067 | 1,174,329 | 1,070,988 |
| Excluding Myanmar | 820,355 | 804,390 | 1,015,613 | 1,108,513 | 962,882 |

- China's imports in 2022 reduced to 962k MT vs LY 1.1 Mil excluding Myanmar.
- Frequent lockdowns & slower economy led to reduction in HORECA demand last year.
- Higher prices has led to demand substitution in the Q1 of this year.
- We foresee a similar demand trend unless there is a price correction to bring back some demand.

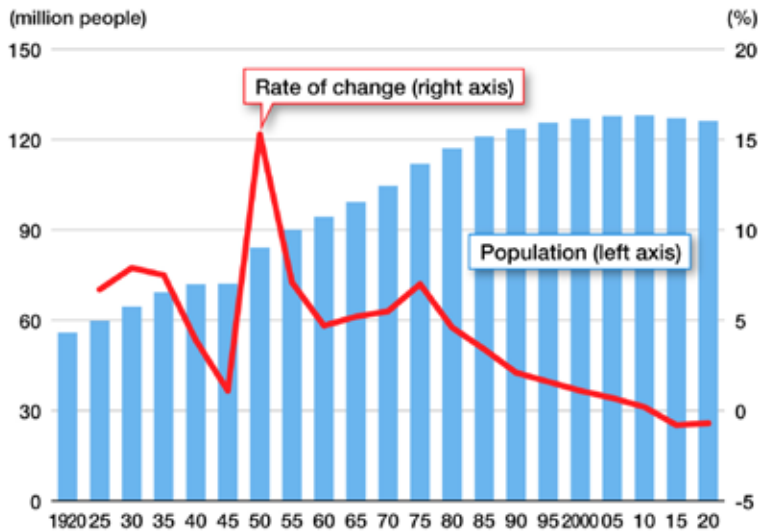


1,200 k Tons Total demand



Demand: Japan

Japan's Population and Rate of Change



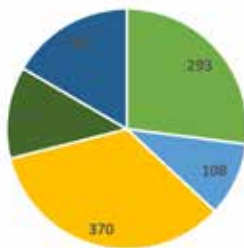
Created by Nippon.com based on the 2020 Population Census preliminary results published by the Statistics Bureau, Ministry of Internal Affairs and Communications. Figures for 2020 are preliminary.



- Japan is likely to have 180-200k MT average demand.
- Population reduction would hamper year-on-year sesame demand in the market.
- Population reduction by 800,000 estimated this year. Population peaked at 130 m and would reach 120m in a few years.

Tahini Market Overview

Tahina Market by Value 1.08 B USD



■ NAmerica ■ GCC ■ ME ■ NAfrica ■ South Europe

- Traditional use of Tahini like Halva, spreading due to immigration/ migration
- Increasing acceptance of Mediterranean food as health food
- Explosion of Hummus as a health food in developed markets. Entry of Nestle, PepsiCo, and Kraft in hummus
- Growing usage in salad dressings/ sauces/ dips

Demand: ROW

| Country | 2019 | 2020 | 2021 | 2022 | 2023 E |
|-------------|------|-------|-------|-------|---------|
| Japan | 187 | 205 | 151 | 170 | 180-200 |
| Middle East | 125 | 122 | 126 | 127 | 120 |
| Turkey | 161 | 181 | 200 | 175 | 180-200 |
| Israel | 67 | 66 | 76 | 78 | 70-75 |
| EU | 130 | 133 | 129 | 125 | 135 |
| Vietnam | 50 | 51 | 49 | 55 | 55 |
| S.E Asia | 45 | 43 | 43 | 48 | 50 |
| Korea | 75 | 77 | 78 | 78 | 80 |
| US & Canada | 38 | 43 | 44 | 52 | 40-50 |
| Others | 110 | 110 | 110 | 110 | 110 |
| Total | 988 | 1,031 | 1,006 | 1,018 | 1,000 |

- Turkey's import & re-export business continues to remain firm.
- Israel's import & re-export of Tahina owing to FTA with the US has been steady.
- Middle East region largely imports from Sudan, India & Ethiopia.
- Europe's demand has been steady. Greece leading the imports of Sesame for Tahina. Halwa & Sesame bar demand.
- Korea: State tender contributes to 36k to 40k MT/Year & the rest is under a Private quota. Since 2016, 24k MT is under China FTA.
- India remains an opportunistic buyer to cover their shortfall.

The total demand of Processed & Natural Sesame for the rest of the world has been relatively stable around 1.0 Mil MT

Price History | Crush Grade



Major Cues | Sep-Dec'23

Bullish Cues:

- Tanzania & Mozambique sold out. Overdependence on Nigeria Crop this season by all the markets.
- Pipeline stocks with processors in all major destinations is less owing to higher prices.
- Sudan supplies will remain disrupted & Ethiopia supply improvement is not much.
- El Nino's impact is unfolding | India's Winter crop is expected to be a short crop.

Bearish Cues:

- China's excess domestic crop supplies this season balancing lesser stocks at the port.
- Pakistan's supplies available for now.

Sesame Price outlook remains bullish with limited downside.

We can expect 1800-2000 USD/MT price range.

Session-1: Country-wise 2023 Sesame Crop: Review and Outlook



From Left,
Chen Ying, CFNA
Mr Rajesh Bheda, Talakshi Lalji & Co
Ms Camila Regina, Lander Agribusiness
Mr Alok Bhargava, CA Praramb Agri Trading DMCC
Mr Anil Manglani, Mast Qalander Group – Pakistan
Mr Burhan Abuodah, Sadida Agricultural Co
Mr Jahid Nagarwala, AgroX Gulf-Alfa Group
Mr Abubakar Usman Karfi, Silvex International

Moderator: Mr Alok Bharagava, Praramb Agri Trading DMCC

Country Wise Sesame Seed Panel

Key Points:

Tanzania: The estimated sesame seed production in 2023 is around 120,000 to 130,000 MT. Japan and China are the major export markets.

Mozambique: The anticipated sesame crop for 2023 is approximately around 90,000 MT. Japan, China, and Turkey are the major export markets for these sesame seeds.

Uganda: The anticipated sesame crop in 2023 will be similar to or better than the 2022 estimate of 20,000 to 25,000 MT. Japan and China are the major export markets.

Nigeria: The anticipated crop size in 2023 is around 300,000 MT, expected to be better than last year. However, logistics issues to continue this year also. Japan, China, and the Middle East are the major export markets.

Burkina and allied: The expected crop for 2023 is the same as last year, at 180,000 MT. Burkina now allows duty-free trade. The main export countries are Japan, China, and Turkey.

China – Sesame Seed Imports -2022

| COUNTRIES | 2022(MT) | PCT (%) |
|---------------|------------------|---------------|
| ETHIOPIA | 73,909 | 6.90 |
| TANZANIA | 103,665 | 9.68 |
| MOZAMBIQUE | 113,381 | 10.59 |
| NIGERIA/NIGER | 214,468 | 20.03 |
| BURKINA FASO | 152,092 | 14.20 |
| UGANDA | 12,111 | 1.13 |
| SUDAN | 170,903 | 15.96 |
| SUB TOTAL | 840,529 | 78.48 |
| PAKISTAN | 84,985 | 7.94 |
| BURMA | 108,106 | 10.09 |
| OTHES | 37,368 | 3.49 |
| SUB TOTAL | 230,459 | 21.52 |
| TOTAL | 1,070,988 | 100.00 |

Imports for 2023(Jan-June) accounted for 437,554 MT, compared to 678,080 MT imported during the same period in 2022.

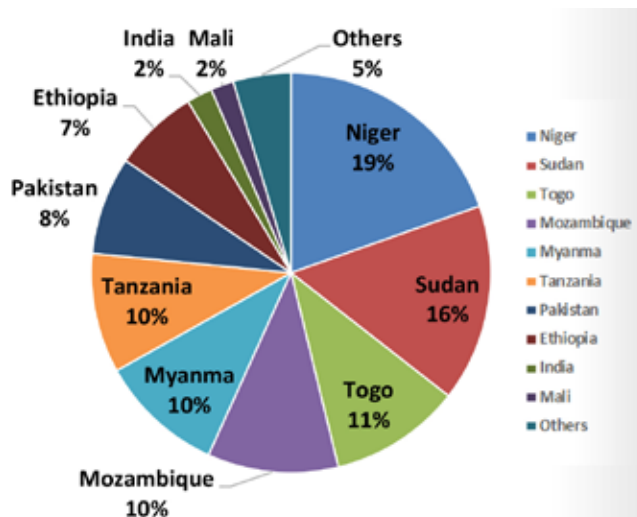
China Sesame Seed Production & Trade, Ms Chen Ying, Director of Cereals & Oils Dept., CFNA

China Sesame Seed Import



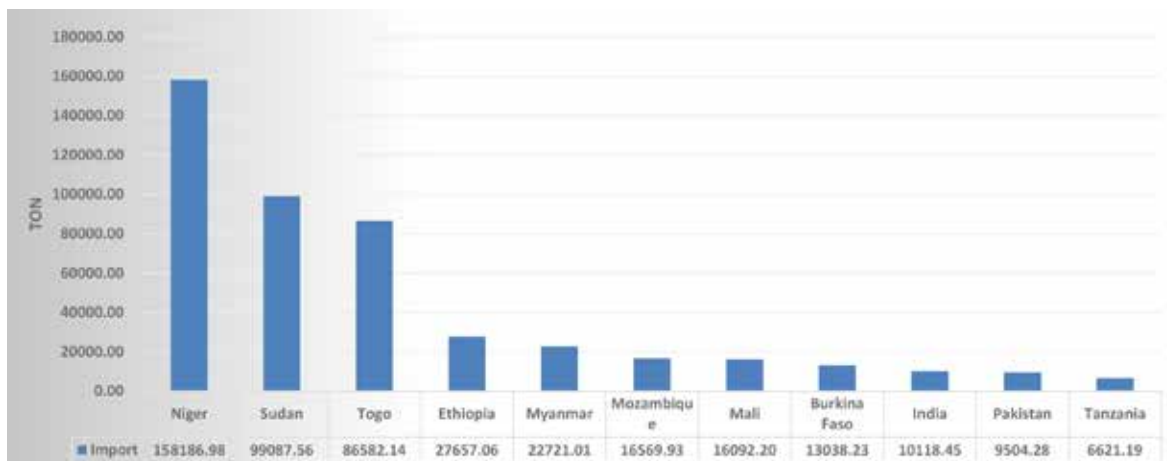
Source: China Customs

China Sesame Seed Import by Major Origins (Market Share in 2022)



Source: China Customs

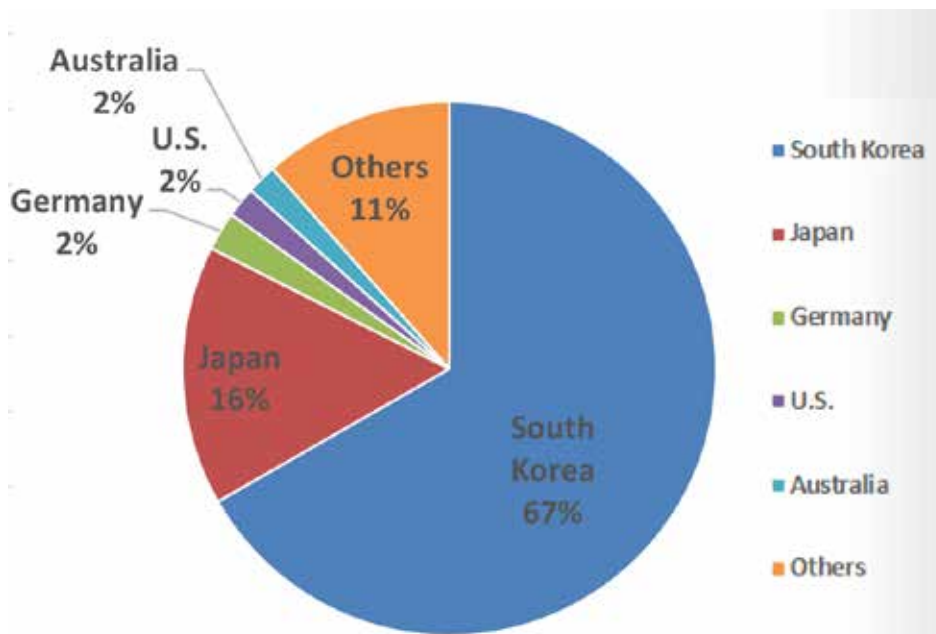
China Sesame Seed Import -2023 (Jan- Jul)



Source: China Customs

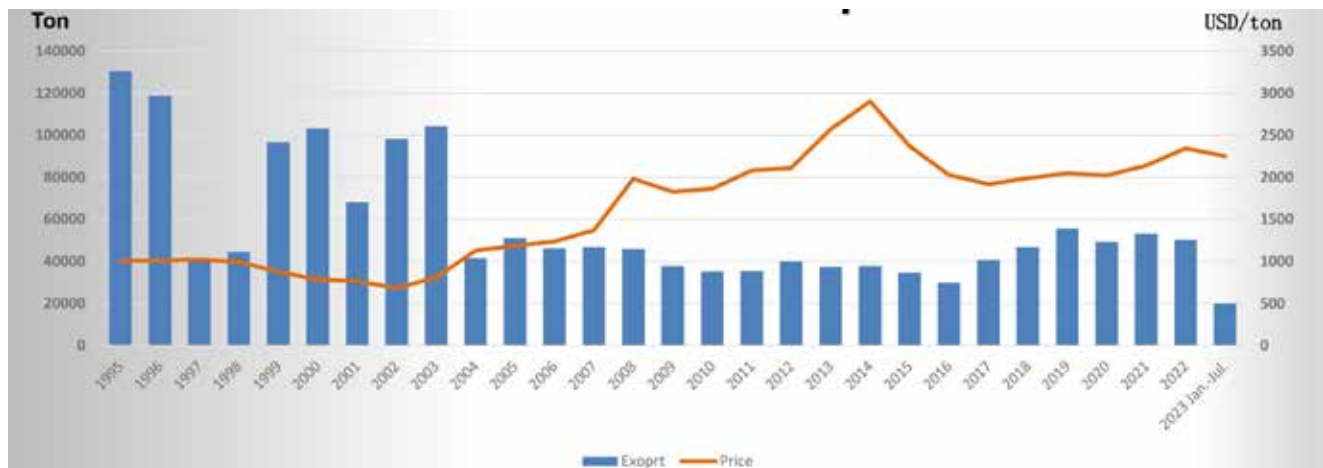
- China mainly imports sesame seeds from African countries enjoying zero tariff treatment, like Sudan, Niger, Togo, Ethiopia, Tanzania, etc., accounting for over 80% of the total import.
- From 2021, Pakistan sesame can also be exported sesame to China with zero tariffs. Asian countries like India and Myanmar are also important sesame origins to China. China opened the import of sesame from Brazil this year, and it is believed that sesame from South America will continue to increase.
- In the first seven months of 2023, China imported 480,554 MT of sesame seed, which decreased by 33.13% year-on-year. The top five origins are Niger, Susan, Togo, Ethiopia, and Myanmar, accounting for 82.05% of the total.

China Sesame Seed Exports by Major Destinations (Market Share in 2022)



Source: China Customs

China sesame seed export:



Source: China Customs

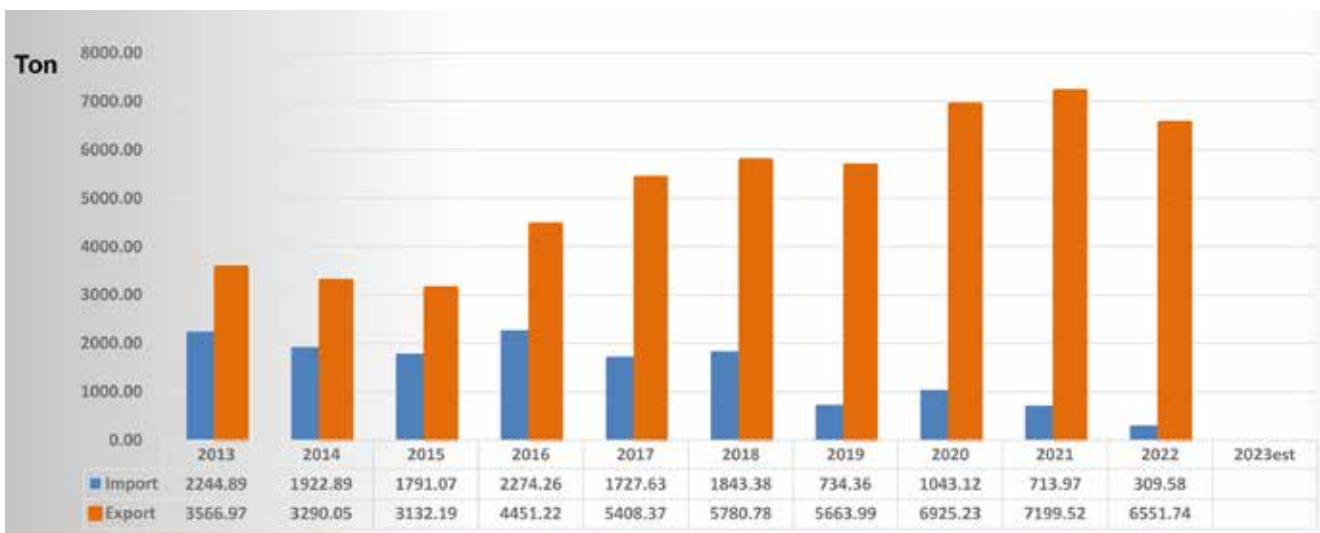
China Sesame Seed Export - 2023 (Jan- Jul)

In the past decade, China's sesame seed export volume has remained stable, with the main exporting countries being South Korea and Japan. since 2016, the export volume has slightly increased, with an average of over 40,000 MT.

In the first seven months of 2023, China exported 19,985 MT of sesame seed, which decreased by 40.21% year-on-year. South Korea and Japan remain the top two destinations, accounting for 66.8%.

The export price reached a historical high in 2014, with 2903 USD/ MT. Afterward, there has been a relatively mild increase since 2017. By 2022, the turbulent international situation had further pushed this price to 2344 USD/ MT.

China Sesame Oil Import & Export



Analysis of sesame planting and market trends in China in 2023

Production: In 2023, the planting area has increased by over 20%, according to the latest survey. Favourable weather conditions may lead to production recovery but won't fully meet domestic demand.

Import: High sesame seed prices continue, leading to an expected decrease in imports in 2023. Future imports depend on the RMB-to-USD exchange rate and supply from Tanzania, Mozambique, and Pakistan.

Export: Elevated prices and sellers' reluctance will likely result in a 30% decrease in exports.

Overview of Indian Sesame Seed Scenario, Mr Rajesh Bheda – Talakshi Lalji & Co.

Interesting Facts

- Annual Production – 500-650 Thousand MT
- Annual Exports – 200-250 Thousand MT
- Share in Global Production 7-9 per cent
- Share in Global Exports 9-11 per cent
- Indian local consumption is increasing year-on-year

Average Area (Million Ha): World: 9.1 and India 1.4(15.38 %)

Production (Million MT): World: 5.73 and India 0.60(11 %)

Export (Million MT): World: 2.23 and India 0.23(10.3 %)

Source: Oil World, 2021; IOPEPC

India's Export of Sesame Seed (MT)

India Exports to more than 140 countries

| S No. | Country | 2022-23 | 2021-22 | Share % |
|-------|----------------|-----------------|----------------|------------|
| | | Qty | Qty | |
| 1 | KOREA RP | 37,926 | 38,359 | 16.58 |
| 2 | EUROPEAN UNION | 22,807 | 26,375 | 10.00 |
| 3 | U.S.A. | 16,232 | 19,460 | 7.1 |
| 4 | CHINA | 14,505 | 18,813 | 6.34 |
| 5 | RUSSIA | 15,817 | 14,293 | 6.91 |
| 6 | VIETNAM | 10,762 | 12,718 | 4.7 |
| 7 | TAIWAN | 9,934 | 9,725 | 4.34 |
| 8 | INDONESIA | 10,501 | 9,281 | 4.59 |
| 9 | ISRAEL | 8,563 | 9,148 | 3.74 |
| 10 | MALYSIA | 8,209 | 6,937 | 3.59 |
| | Others | 90,597 | 96,685 | 39.62 |
| | Total | 2,28,654 | 242,145 | 100 |

Source Directorate General of Foreign Trade, Ministry of Commerce, Govt. of India (April-March)

Indian Sesame Seed Exports (MT)

| Year Apr-Mar | Qty (Tons) |
|--------------------|------------|
| 2023-24 (Apr-June) | 71,041 |
| 2022-23 | 2,28,654 |
| 2021-22 | 2,42,145 |
| 2020-21 | 2,73,260 |

Indian Sesame Seed Imports (MT) (April-March)

| 2023-24 (Apr-June) | 2022-23 | 2021-22 | 2020-21 |
|--------------------|---------|---------|----------|
| 11,220 | 64,108 | 21,095 | 1,03,235 |

Source Directorate General of Foreign Trade, Ministry of Commerce, Govt. of India

During 2022-23, India imported Sesame seed mainly from Sudan, Brazil, and Nigeria accounting for over 88 percent share of total imports.

Higher imports by India have a direct correlation with its production levels. The higher the Sesame Seed production, the lower the imports and vice versa.

Indian Sesame Seed Crop 2022-23

Sesame Crop Kharif 2022

| State | Planting Average 2022 (ha) | Share % | Harvest Average 2022 (Ha) | Yield (Kg/ha) | Production (MT) | Share (%) |
|--------------------------|----------------------------|-------------|---------------------------|---------------|-----------------|-------------|
| Uttar Pradesh | 4,01,794 | 30% | 3,18,498 | 214 | 68,083 | 26% |
| Madhya Pradesh | 3,93,400 | 29% | 3,16,708 | 201 | 63,585 | 24% |
| Rajasthan | 2,65,200 | 20% | 2,14,716 | 293 | 62,988 | 24% |
| Gujarat | 72,100 | 5% | 72,100 | 359 | 25,870 | 10% |
| Total of 4 Sesame States | 11,32,494 | 84% | 9,22,022 | - | 2,20,526* | 84% |
| Others | 2,13,506 | 16% | 1,73,826 | - | 41,574 | 16% |
| India Total | 13,46,000 | 100% | 10,95,848 | 239 | 2,62,100 | 100% |

Source: IOPEPC Crop Survey

*Only in respect of white sesame seed

- If you notice, the vast difference in sowing and harvest in the states of Uttar Pradesh, Madhya Pradesh, and Rajasthan is because of excessive rainfall.
- During Rabi (Summer) 2023, Gujarat was estimated to have produced 1,40,318 MT of Sesame Seed with a yield of 1121 Kg/Ha.

Current Situation – Area Under Sesame Cultivation (Hundred Thousand Ha)

| Rank | State | Average Area as on 11 August 2023 | 2023 | 2022 | 2021 |
|------|------------------|-----------------------------------|---------------|---------------|---------------|
| 1 | Uttar Pradesh | 3.623 | 3.480 | 3.842 | 3.786 |
| 2 | Madhya Pradesh | 3.41 | 4.000 | 3.52 | 3.09 |
| 3 | Rajasthan | 2.722 | 2.324 | 2.628 | 2.669 |
| 4 | Gujarat | 0.83 | 0.543 | 0.636 | 0.873 |
| 5 | Odisha | 0.5 | 0.269 | 0.343 | 0.524 |
| 6 | Chhatisgarh | 0.226 | 0.145 | 0.186 | 0.196 |
| 7 | Karnatka | 0.224 | 0.102 | 0.183 | 0.223 |
| 8 | Andhra Pradesh | 0.136 | 0.056 | 0.197 | 0.133 |
| 9 | Maharashtra | 0.091 | 0.044 | 0.06 | 0.072 |
| | Others | 0.417 | 3.806 | 0.357 | 0.506 |
| | ALL INDIA | 12.179 | 11.289 | 11.952 | 11.876 |

The area under Sesame cultivation (as of 11 Aug 2023). Production will depend on the weather conditions until harvest.

IOPEPC has commissioned a survey that will unveil the expected crop figures for the ensuing Kharif season.

Advantages and Observations

Advantages:

- India has the unique distinction of being a producer, consumer, exporter and importer.
- Sound processing and logistics infrastructure, a hulling capacity of about 250,000 MT.
- Cleaning and color sorting capacity exceeding 500,000 MT.
- Packaging capability of small consumer packs to jumbo bags of 1000 kgs.
- Good network of seaports and inland dry ports + road network enables quick export connections.
- Digital processing of documents in the last 4/5 years has streamlined pre- and post-export procedures.
- India enjoys Geo-Political Stability.

Observations:

- India's production over the past few years has stagnated.
- Exports have declined, and domestic consumption is on the rise.
- Efforts are being taken by IOPEPC to identify reasons and take corrective steps to improve yields.
- New varieties are being developed, which might result in enhanced yields three years from now.
- Though China Is the Largest Importer of Sesame Seed, India's Share compared to their Import is less than 2%.

Pakistan 2023 Crop Outlook and Market Trend, Mr Anil Kumar Manglani,

Mast Qalandar Group

2022 Crop Summary

| FOR THE YEAR 2022 | QUANTITY IN MTS | |
|------------------------------|-----------------|---------|
| CARRY FORWARD | + | NIL |
| CROP PRODUCED | + | 200,000 |
| EXPORTS JULY 2022- JUNE 2023 | - | 85,000 |
| BORDER TRADE | - | 25,000 |
| LOCALLY CONSUMED | - | 30,000 |
| DAMAGED CROP | - | 60,000 |
| CLOSING STOCK | | NIL |

2023 Sesame Crop Status

Most farmers switched to hybrid-type seeds due to quality issues, with Farmi-type seeds due to quality issues last year owing to heat waves, rains, and pest attacks.

This year's crop size is likely to be better than last year's due to an increase in acreage by 10-20 per cent as compared to last year, adequate rains, fewer heat waves, etc.,

2023 Sesame Crop and Price Expectation

| FOR THE YEAR 2022- 2023 | | QUANTIY IN MTS |
|-----------------------------------|---|-------------------|
| CARRY FORWARD | + | 0 |
| ESTIMATED CROP PRODUCTION | + | 225,000 (+/- 10%) |
| ESTIMATED BORDER TRADE | - | 25,000 |
| ESTIMATED LOCAL CONSUMPTION | - | 30,000 |
| ESTIMATED DAMAGED CROP | - | 11,000 (5%) |
| ESTIMATED EXPORT 2022-2023 | | 150,000+ |

Arrivals have started from all growing areas. Rumors that crop size is much higher. Price varies with every seller, considering the demand, the average selling price is USD 1725/MT FOB.

Logistics, Currency and Shipping

Pakistani rupee is steadily depreciating against the USD over the past few years. The cost of production has also increased due to hikes in fuel prices, electricity, and labor charges, and higher transportation costs.

At present, no problems with respect to shipping. However, there could be a shortage of containers in the near future due to several factors, including India's ban on rice exports, and hence demand shall divert to Pakistan.

Nigeria 2023 Sesame Crop Review and Outlook, Mr Sheriff Balogun, NSSGA (National Sesame Seed Association of Nigeria)

Industry Overview

- Nigeria is Africa's second-largest sesame producer after Sudan and the fifth in the World.
- Largest exported commodity and highest non-oil forex earner since 2019
- 580,000 metric MT annual production (National Bureau of Statistics 2019)
- 7.6% of the total exported commodity from Nigeria 2022 - NEPC
- WACOT (TGI Group) and Valency Agro Nigeria LTD promote organic sesame under ECOCERT Certification in Nigeria
- Nigerian sesame season August to February/April, peak in November to December.
- Sesame seed price range U\$D1,750 to U\$D1,950 per MT 2023 season.
- It is the main source of income for more than one million farmers

Sesame Market in Nigeria

- Nigeria is a significant contributor to the global sesame seed trade, with annual exports valued at about US\$670 million
- Nigeria made the sum of N112.8 billion from the export of products in 2020 despite the COVID-19 pandemic, which accounted for 38.9% of the top 10 agricultural products.
- According to the foreign trade report for Q2 released by the National Bureau of Statistics (NBS), N41.94 billion worth of sesame seeds were exported, generating more than \$100 million in foreign earnings to the country.
- Nigeria is responsible for about 10% of the global sesame seed market.
- 70-90% of the sesame seed produced in the country is exported with minimal processing that is limited to drying and cleaning
- The main export destinations are Turkey, China, India, Japan and Europe

NIGERIA SESAME SEED PRODUCTION MAP

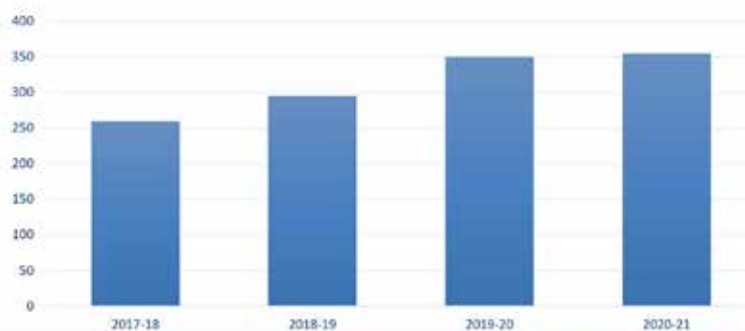
Last Season Production Estimate

| Regions | States | Production (in MT) |
|-----------------------------|-----------|--------------------|
| North and North-East States | Taraba | 10,000 |
| | Bauchi | 45,000 |
| | Gombe | 18,000 |
| | Katsina | 15,000 |
| | Jigawa | 50,000 |
| | Zamfara | 5,000 |
| | Yobe | 50,000 |
| Middle Belt | Borno | 15,000 |
| | Nassarawa | 60,000 |
| | Benue | 15,000 |
| | Niger | 10,000 |
| | Abuja | 10,000 |
| | Kogi | 3,000 |
| Total Production | | 306,000 |



Export data

These are estimate numbers of export from Nigerian ports based on arrivals in destination markets



| Season | 2017-18 | 2018-19 | 2019-20 | 2020-21 |
|----------------------|---------|---------|---------|---------|
| Quantity in '000 MTS | 260 | 295 | 350 | 355 |

Challenges In Sesame Seed Production

- Lack of mechanised and modern farming techniques.
- Outdated skills, limited access to finance and technology.
- The yield per hectare in Nigeria is 0.5 – 1.0 MT; this is very low compared to 1.4–1.6 MT per hectare global standard.
- Knowledge gap and poor crop management practices adopted by small-holder farmers in Nigeria.
- Also, poor processing procedures and postharvest handling practices also affect yields considerably.

Outlook

- Nigeria needs to develop new, high-yielding, and disease-resistant seed varieties with a better harvest per hectare.
- There is a need for further research and deployment of new and improved sesame farming techniques and modern agronomy practices that can improve crop yield and expand production.
- There should be an establishment of more new processing plants by the private and public sectors. This is necessary to improve the quality of sesame seeds processed in Nigeria. It will increase better price as the processed outputs meet international standards
- There should be increased private sector participation in production, processing, and marketing chains. This will further boost the revenue and foreign exchange that can be obtained from the production and export of this commodity.
- There is a need to improve on value additions, such as the extraction of sesame oil and other derivatives on a commercial scale
- There is a need for farmers to have easy access to certified and improved seed varieties and other Agro-inputs at the right time.

Mozambique Sesame Crop Season 2023 - Mr Jahid Nagarwala, ALFA Group

Key takeaways of the 2023 season

During this 2023 season, Mozambique sesame crop is estimated at 75,000 to 80,000 MT, lesser by 20,000 to 25,000 MT than the benchmark crop size of 100,000 MT.

Out of the estimated 80,000 MT, about 40-45,000 MT has already been shipped out of the country, and the remaining is waiting to be shipped out. Currently, very little unsold cargo is left with exporters, hinting no scope for significant ending stocks.

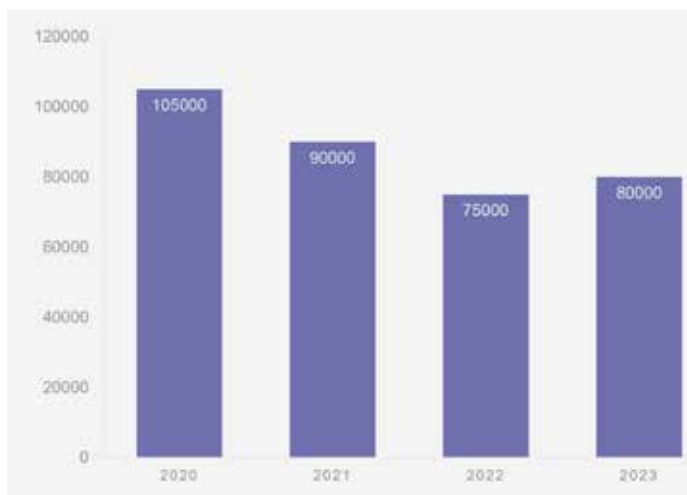
Sesame forward trade started in the region of USD 1830 to 1850 per MT and touched a high of USD 1900 per MT in early June.

In early July price came down to USD 1780 to 1800 CNF and recovered to trade at around USD 1850. This time Turkey emerged as a major buyer of Mozambique sesame, surpassing China, which usually buys a lot.

Container shortages and port congestion have improved much better compared to last year.

Negative factor: From July 2023 oil seed department of Mozambique has been trying to put a 2.5 per cent export duty on oil seed export, including Sesame seed, soya beans and cotton seed. This law has not been implemented forcefully, but local-level authorities already started pushing, and exporter is trying to manage in their own way, which will lead to an unexpected increase in their cost.

Mozambique Sesame Production (MT)



Mr Sisay Asmare (EPOSPEA) on Ethiopian Sesame

The weather conditions are good this time, and the sowing area has increased compared to last year. Around 500 thousand ha of Humera sesame is sown, and 300 thousand ha of Wollega sesame is sown.

The yield expectation this time is 150,000 MT of Humera and 90,000 MT of Wollega variety. The total yield will be around 240,000 MT.

The previous season's leftover stock is around 7000 MT. Last year export of sesame from Ethiopia was around 130,000 MT.

The problem in Ethiopia continues and may affect the transportation of this season's sesame crop.

Agricultural and the production of sesame seeds – Chad, Mr Burhan Wajeh Abuodah, General Manager, Sadida Company

General information about sesame in Chad

- The average pricing falls within the range of \$1,100 and \$1,800 USD
- The sesame season begins on November 15th and concludes at the end of March
- Sesame markets are located in N'Djamena and Mondo.

Session-2: Country-wise 2023 Peanut Crop & Markets: Review and Outlook



From left,
Ms Jessica Chan, Global Agriculture Info Group (GAIG)
Mr Khushwant Jain, G.S. Exports
Mr Kanak Thakkar, JKT Enterprises
Ms Iman Reda, Gedco Jordan (Free Zone) LLC
Mr Jahid Nagarwala, AgroX Gulf-Alfa Group
Mr Edoardo M Fracanzani, Argentine Peanut Chamber (Online)
Mr Boubacar Konta, iDeal Business (Online)

Chairperson - Mr Kanak Thakkar, JKT Enterprises

JKT journey has begun in 1977 with a vision held by Mr Kishore Thakker

With a commitment to quality and customer satisfaction, the company has evolved from a local enterprise to an international player leaving an indelible mark on the global market



In 2005
 JKT expanded its operations by investing in a state-of-the-art processing plant in Navi Mumbai.

JKT has also established a peanut plant in Chennai, with JKT solidifying its position in the southern region of India.



ISO 22000 & BRC Certified
 Our Certified Plants exemplifies JKT's commitment to Quality and Safety.

JKT takes pride in managing the entire supply chain seamlessly-from local procurement to hassle-free delivery.



In 2018
 The Company established a shelling plant in Rajkot, equipped with advanced technology, further enhancing their processing capabilities, which is also BRC certified.

Global Impact

- JKT Foods EUROPE DMCC, established in 2019, operates as a B2B trading company registered in the Dubai Multi Commodity Centre, which focuses on enhancing the supply chain for Asian customers by sourcing high-quality products from around the world.
- JKT trades more than 40,000 MT of sesame annually to global markets and handles about 2-3% of total world sesame trade.

India 2023- Groundnuts Crop and Market Trends, Mr Khushwant Jain, Partner, G. S. Exports

Overview of India Groundnut Scenario

- Groundnut is an Important oilseed crop in India, occupying the first position in the area and second in production after Soybean.
- India is the second largest Groundnut Producer in the World after China, producing about 8 million MT of Groundnut In shell.
- The two main varieties grown are Java (Spanish), Bold (Runner), and Red Natal.
- Groundnuts in India are available throughout the year due to a two-crop cycle harvested. Groundnuts are important protein crops in India grown mostly under rain-fed conditions.
- The government of India has initiated action to upgrade all the Export-oriented Groundnut processing units to a world-class level.
- India has a world-class Processing Facility for Peanut Butter, Blanched, and coated Peanut.
- India also processes and Exports raw and Refined Groundnut Oil.

India's Export of Groundnuts (MT) April 22 – March 23

| Country | Quantity (MT) | Share (%) |
|-------------|---------------|-----------|
| INDONESIA | 226,933 | 33.93 |
| VIETNAM | 155,659 | 23.27 |
| PHILIPPINES | 51,151 | 7.65 |
| MALAYSIA | 50,342 | 7.53 |
| THAILAND | 40,175 | 6.01 |

Highlights of World Sesame & Peanut Conference - 2023

| | | |
|--------------|----------------|---------------|
| U.A.E. | 20,042 | 3.00 |
| BANGLADESH | 19,424 | 2.90 |
| NEPAL | 12,430 | 1.86 |
| AFGHANISTAN | 11,667 | 1.74 |
| IRAN | 11,576 | 1.73 |
| CHINA | 11,276 | 1.69 |
| RUSSIA | 8,664 | 1.30 |
| Total | 668,885 | 100.00 |

India's Export of Value-added Groundnuts & Peanut butter (April 22 – March 23)

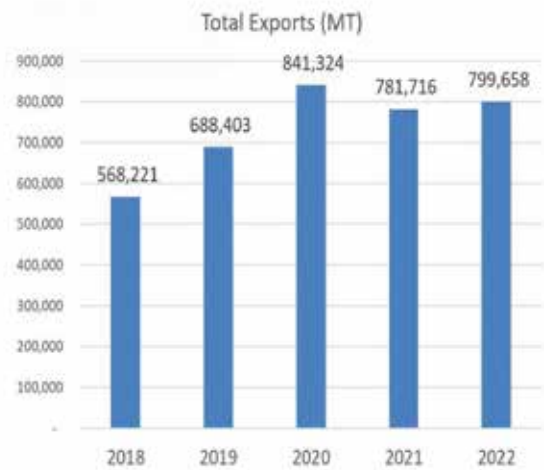
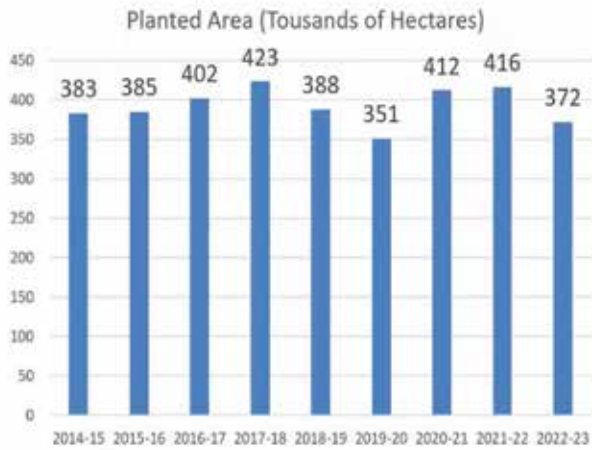
| Country | Quantity (MT) | Share % |
|--------------|---------------|---------------|
| U A E | 6,535 | 13.29 |
| SOUTH AFRICA | 3,491 | 7.10 |
| AFGHANISTAN | 3,310 | 6.73 |
| NETHERLAND | 2,965 | 6.03 |
| U S A | 2,735 | 5.56 |
| SAUDI ARAB | 2,545 | 5.18 |
| IRAQ | 2,472 | 5.03 |
| KENYA | 2,351 | 4.78 |
| RUSSIA | 2,298 | 4.68 |
| ETHIOPIA | 1,810 | 3.68 |
| Total | 49,156 | 100.00 |

Groundnut Kharif-2023 Production

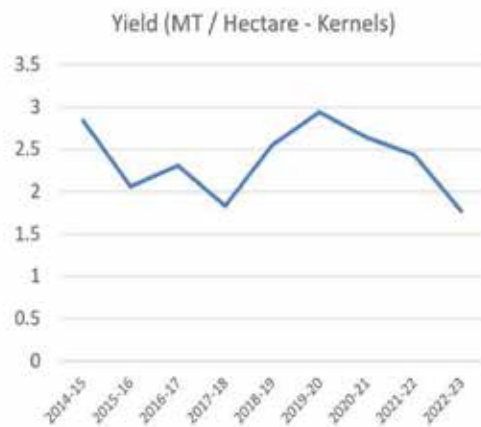
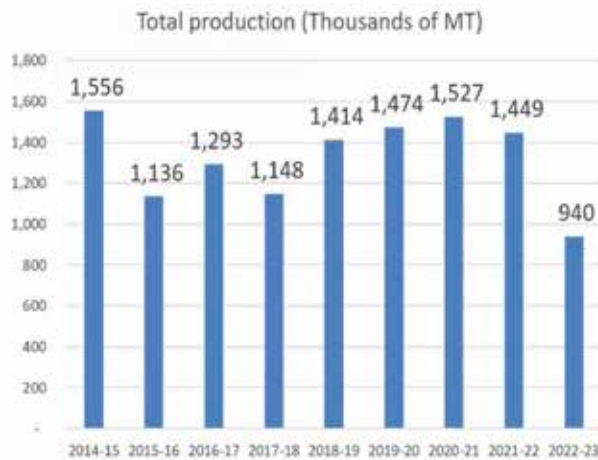
| State | Acreage (Ha) | Share (%) | Yield (Kg/ha) | Production (MT) | Share (%) |
|----------------|--------------|-----------|---------------|------------------|-----------|
| Gujarat | 16.34 | 38% | 1300 | 2,124,200 | 36% |
| Rajasthan | 8.69 | 20% | 2000 | 1,738,000 | 29% |
| Madhya Pradesh | 5.40 | 12% | 1350 | 729,000 | 12% |
| Karnataka | 3.11 | 7% | 1100 | 342,100 | 5% |
| Andhra Pradesh | 2.80 | 6% | 700 | 196,000 | 3% |
| Uttar Pradesh | 2.26 | 5% | 1000 | 226,000 | 4% |
| Tamil Nadu | 1.66 | 4% | 1600 | 265,600 | 4% |
| Maharashtra | 1.42 | 3% | 1000 | 142,000 | 2% |
| Others | 1.59 | 4% | 1250 | 198,750 | 3% |
| Total | 43.27 | | | 5,961,650 | |

The Argentina Peanut Sector, Mr Edoardo Fracanzani, Executive Director of Argentina Peanut Chamber (Online)

Argentina Planted Area and Exports:



Argentina Peanut Production

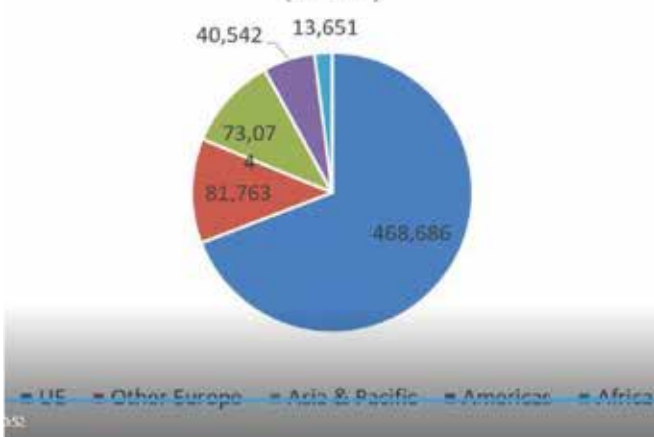


| | Total period Jan-Jul |
|------|----------------------|
| 2021 | 369,039 |
| 2022 | 378,073 |
| 2023 | 404,179 |

Supply and Demand -2023

| COMMERCIAL YEAR (from June to May) | AREA | | YIELD (Kernel Basis) | SUPPLY | | | | DEMAND | | | | ENDING STOCKS | |
|---------------------------------------|-----------|-----------|-------------------------|---------------|----------------------------|---------|-----------|-------------------------------------|----------------------------|--------|---------|---------------|--------|
| | Planted | Harvested | | Initial Stock | Production | Imports | Total | Domestic Market + Blanched stock | Oilseed | Seeds | Exports | | Total |
| | Hectareas | | | Tm/Ha | Metric Tons (kernel Basis) | | | | Metric Tons (kernel Basis) | | | | Tm |
| 2020/21 | 417.247 | 412.365 | 2.64 | 24.283 | 1,090,293 1,557,562 | 0 | 1,114,576 | 74,000 | 203,277 | 61,500 | 713,540 | 1,052,317 | 62,259 |
| 2021/22 | 417.115 | 415.895 | 2.44 3,49 | 62,259 | 1,014,784 1,449,691 | 0 | 1,077,043 | 74,325 | 171,731 | 52,000 | 729,936 | 1,027,992 | 49,051 |
| 2022/23 | 373.795 | 371.920 | 1,77 2,53 | 49,051 | 658,298 940,426 | 0 | 707,349 | 77,000 | 141,470 | 55,000 | 433,880 | 707,349 | 0 |

Argentina's Peanut Exports by Area of Destination (kernels)



| Top 10 | TM (kernels) |
|------------|--------------|
| Netherland | 266,886 |
| UK | 51,433 |
| Poland | 45,265 |
| Italy | 21,888 |
| Russia | 21,281 |
| Australia | 20,471 |
| Germany | 20,114 |
| France | 18,521 |
| Spain | 18,184 |
| Chile | 17,361 |

China Peanut Situation - Analysis & Forecast, Ms Jessica Chan, Director, Global Agriculture Info Group (GAIG)

Production & Planting Area

| Unit: Hectare | 2020 | 2021 | 2022 | 2023 |
|----------------------------------|------|------|------|------|
| Total Planting Area | 4730 | 4805 | 4590 | 4720 |
| Total Production (10k MT) | 1799 | 1831 | 1790 | 1842 |
| Henan | 1261 | 1293 | 1286 | 1290 |
| Shandong | 651 | 632 | 600 | 610 |
| Liaoning | 306 | 332 | 305 | 325 |
| Jilin | 239 | 243 | 215 | 230 |
| Guangdong | 348 | 350 | 347 | 350 |
| Guangxi | 223 | 225 | 225 | 226 |
| Hebei | 246 | 247 | 235 | 240 |

Official data: On planting area, there are 4.6% down in 2022; it will be a 2.8% increase this year. At the same time, the total production, as forecast, will increase by 2.9% compared with last year, which exceeded 2021.

But traders forecasted that the crop decreased by 20-30% last year, while 2023 will increase by 10-12%. Traders may focus more on several parts of the planting area increasing and decreasing, So the number will be something different, Leading end of last year, much cargo was imported by China buyers due to the news of reductions in 2022 China production.

The conclusion is that peanut production will increase this year, and the demand for peanuts will keep increasing.

PEANUT KERNEL IMPORT OF CHINA (UNIT: TONS) 2019-July 2023

| Country | 2019 | 2020 | 2021 | 2022 | 2023 (1-7) |
|------------|--------|--------|---------|---------|------------|
| USA | 400 | 37336 | 10615 | 1487 | 0 |
| Argentina | 3313 | 8869 | 9084 | 8611 | 12277.26↑ |
| India | 10867 | 59167 | 38136 | 5863 | 6471.63↑ |
| Senegal | 264858 | 323393 | 327106↑ | 180592↓ | 170295.90↑ |
| Ethiopia | 88365 | 35817 | 15475 | 917↓ | 411.45↓ |
| Sudan | 36862 | 296549 | 407873↑ | 362382↓ | 337744.19↑ |
| Uzbekistan | 0 | 38 | 2519 | 735 | 160.00 |
| Cameroon | 0 | 188 | 0 | 0 | 0 |
| Others | 101 | 3557 | 9123 | 15880 | 1970 |
| Total | 404665 | 761357 | 819931 | 576467 | 529330 |

PEANUT WITH SHELL IMPORT OF CHINA (UNIT: TONS) 2020-2023

| Country | 2020 | 2021 | 2022 | 2023 (1-7) |
|---------|--------|--------|-------|------------|
| USA | 309709 | 180471 | 87112 | 81928↑ |
| Others | 10277 | 2197 | 487 | 2099 |
| Total | 319986 | 182668 | 87599 | 84027 |

Peanut Oil Imports

| | 2019 | 2020 | 2021 | 2022 | 2023 1-7 |
|-----------|--------|--------|--------|--------|----------|
| Argentina | 93768 | 58237 | 21258 | 32155 | 19847↑ |
| Brazil | 36477 | 52089 | 52336 | 122649 | 57944↑ |
| India | 11191 | 107969 | 165624 | 59204 | 69047↑ |
| Sudan | 18595 | 33020 | 24551 | 9751 | 8013↓ |
| Senegal | 28024 | 3760 | 1847 | 1882 | 2422↓ |
| USA | 174 | 6056 | 5310 | 2139 | 31 |
| Other | 6164 | 8147 | 9825 | 2950 | 9543 |
| Total | 194396 | 269278 | 280751 | 230730 | 166847↑ |

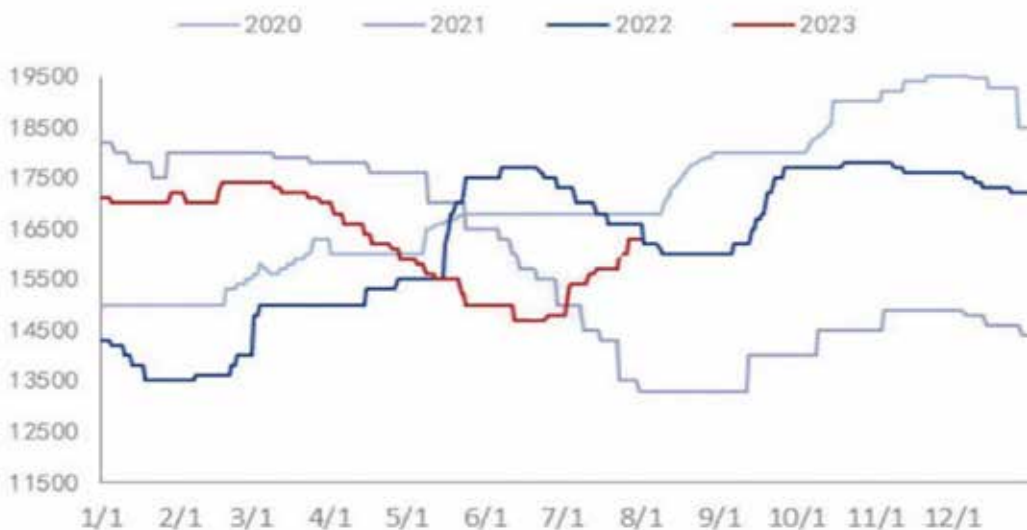
As of July 2023, China has imported 166,847 MT of peanut oil, which is a 93% increase compared to the 86,221 MT imported in the same period in 2022.

Sudan Peanut Selling Price Trends in China Ports

Until August 31, the price of Sudan peanuts was about 10900 yuan/MT in China port, which increased by 150 RMB/MT compared with the previous month. This month, a small number of imported peanuts arrived at the port. Currently, Huang Dao Port's inventory is about 10,000 MT. Adding the oil factories beginning to buy some cargo and the Sudan situation, traders are willing to raise prices.



Peanut Oil Price Trend Chart from 2020-2023



China peanut crushing is 60%, and edible consumption is 40%. As a flavor oil, peanut and Peanut oil have a relatively independent price trend, Peanut meal prices are followed by the three major oils. However, peanut oil has lost its independence this year and is completely dragged by the three major oils. It has been falling from January to June, so the peanut oil factory operation rate is very low, coz they hoard much cargo from 2021 to 2022 that needs to be consumed, adding losses on the crushing, resulting in some large and small oil factories nearly no purchasing and operation on first half year. But from June, the peanut oil prices have increased, there are some profits for the crushing, and factories began buying some cargo.

Supply and Demand

In 2022, China began to implement the soybean oil production capacity improvement project, and increase the support policy for the peanut industry, adding that the profits are better, it is expected that the imports will increase this year. Stimulated by diversifying the import of oils, peanut imports are still important to replenish the domestic supply.

Peanut imports will remain at 600,000-1 million MT, and peanut oil at 240,000-300,000 MT every year. From the trend of the China import data, China still has a strong demand for peanuts, but if the prices remain high level will influence the import quantity.

Senegal 2023 Peanut Crop, Mr Boubacar Konta, President & Director General, Ideal Business Centre

Peanut Campaign 2022/23

During the 2021/22 season, Senegal produced about 1.6 million MT of peanuts, 200,000 MT less than the previous season (2020/21). Out of this, only 162,000 MT were collected for processing by three local companies: Sonacos (79% of the total), COPEOL (15%), and an Indian company called Sine Saloum International Industries (6%). The remaining peanuts were mostly exported to China, with a portion set aside for planting as seeds. Senegal's peanut processing capacity is around 350,000 MT.

Peanuts in Senegal in 2023/24

The production objective for the 2023/24 peanut campaign is 2,000,000 MT. It should be noted that with good rainfall, this objective can be achieved because the distribution of certified seeds was a success reaching a rate of over 80%, and the state's support in acquiring fertilizer would increase the yield/hectare.

Price forecasts for the commercialization of peanuts in 2023

In Senegal, a fixed price will usually be set at the beginning of each peanut campaign. In the previous campaign, the initial price was 275 FCFA per kilogram, but it unexpectedly reached 400 FCFA per kilogram by the end of the campaign. As we approach the 2024 presidential campaign, the minimum price is anticipated to be around 300 FCFA.

It's important to note that peanut prices in Senegal are often influenced by Chinese buyers, leading to price fluctuations. Companies like OLAM often negotiate with processing companies like SONACOS, COPEOL, and OD, providing them with a floor price with a margin ranging from 14.5 to 25 FCFA.

Session-3: Global Sesame Trade: Challenges and Opportunities



From left,
Mr Rengarajan, Torq Commodities
Mr Kunal Kotecha, Padm Group
Ms Anna Maria Arakapiotou, Torq Commodities
Mr KS Prakash, Hakan Foods DMCC
Mr Juby Moothedom, Harvest Afrique Grains Cereals & Legumes Trading Co. LLC.,
Mr Tahir Onur Yalcin, Akdeniz Fora GIDA

Chairperson - Mr Hakan Prakash, Hakan Foods DMCC

Sesame - Challenges in West Africa, Mr Rengarajan Narasimhamoorthy - TORQ Commodities
Torq is responsible for empowering sesame farmers in Bauchi state, Nigeria (A collaborative initiative between TORQ Commodities and the National Sesame Seeds Association of Nigeria).

750 farmers benefitted, Training of best farming practices and Provisions for Seeds and fertilisers

West Africa Challenges – Nigeria

Outdated farming techniques hinder productivity, yielding only 800 Kg per hectare in Nigeria compared to China's 2000 Kg per hectare. Inefficient inland hauling, inadequate road infrastructure, and election-related riots disrupt logistics. Currency fluctuations impact economic stability, and port congestion causes delays in trade operations.

Burkina Faso

Burkina Faso faces several challenges, including political unrest following a military coup and the new government's unsettled status. These issues have led to delayed and reduced cargo arrivals from remote areas. Poor infrastructure disrupts the supply chain, and documentation delays arise due to changes in the power regime. Being a landlocked country, Burkina Faso experiences shortages of containers and trucks during peak seasons, exacerbating road logistics challenges. Additionally, regulatory hurdles at the border from Burkina Faso to Togo increase both timelines and costs for cross-border trade.

Senegal/Mali

Senegal faces several challenges in its agricultural sector, including a small sesame crop of less than 20KT, which includes some cross-border crops from Mali. Climate issues, water scarcity, and soil limitations significantly constrain agricultural production. The lack of advanced agricultural technology further hinders the sector. Additionally, port congestion, delays, vessel skipping, and capacity constraints impact Senegal's trade and export operations.

China and Sudan Sesame: Opportunity and Challenges, Mr Kunal Kotecha - Shree PADM Group

About Shree PADM Group

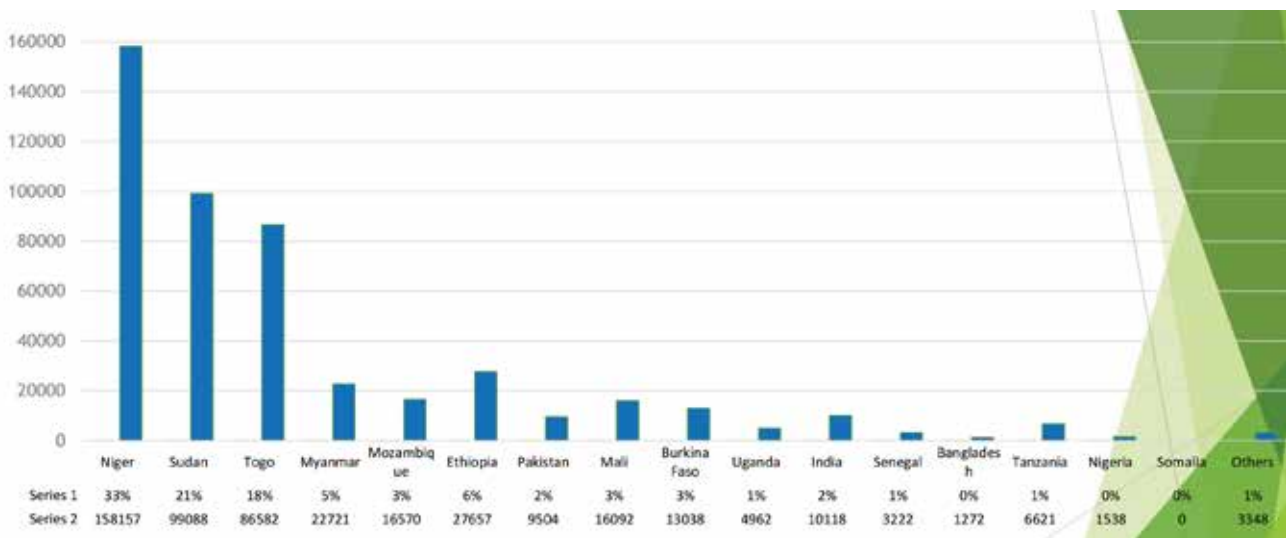
- International Brokerage house engaged in the business of Sesame seeds (All Origin), Peanuts (All Origins), Watermelon seeds and Pulses
- Headquartered in India, having offices in Dubai, Sudan, and China

China Imports of Sesame seeds

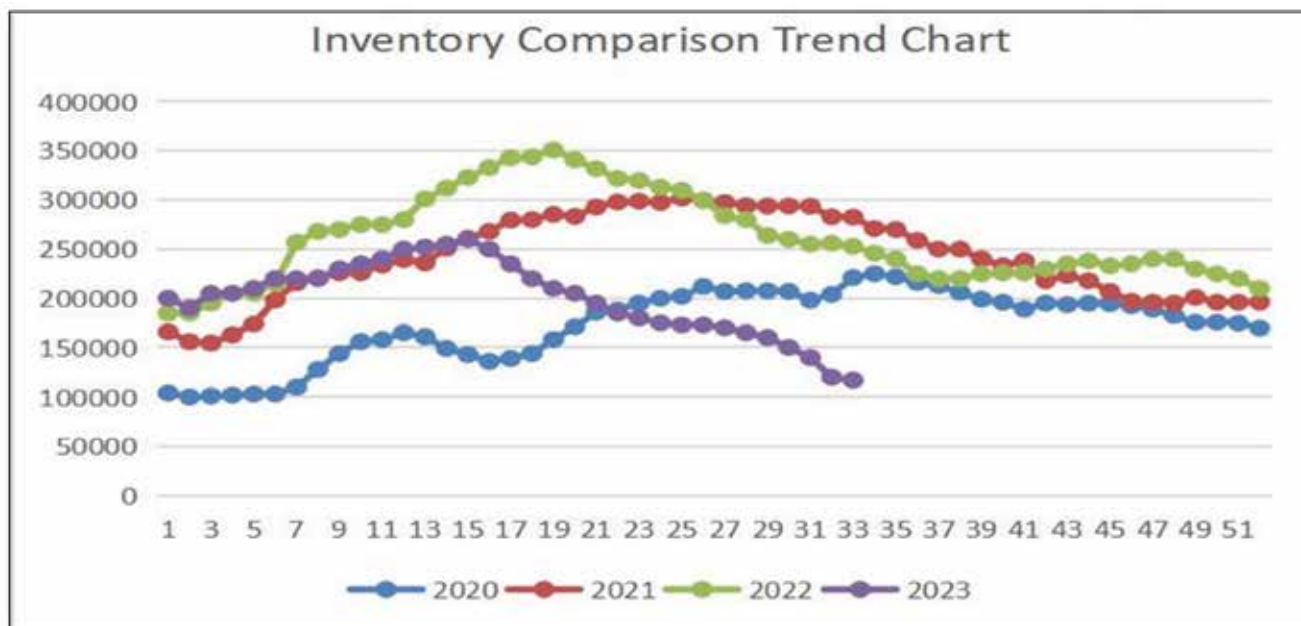
| SESAMESEED IMPORT OF CHINA (UNIT: TONS) 2015-2023 | | | | | | | | | |
|---|---------------|---------------|---------------|---------------|---------------|----------------|----------------|----------------|------------------|
| Country | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23(till to July) |
| Niger | 85270 | 130211 | 104652 | 141814 | 155767 | 177641 | 297800 | 209800 | 158187 |
| Sudan | 92629 | 114551 | 181633 | 254935 | 171131 | 231131 | 148700 | 170900 | 99088 |
| Togo | 131615 | 97908 | 44781 | 101227 | 109129 | 112178 | 165000 | 113900 | 86582 |
| Myanmar | 6957 | 6155 | 8219 | 7524 | 7967 | 455 | 65800 | 108100 | 22721 |
| Mozambique | 47702 | 34536 | 35093 | 52617 | 78675 | 103050 | 65800 | 113400 | 16570 |
| Ethiopia | 187227 | 300965 | 209528 | 160945 | 112470 | 146102 | 121200 | 73900 | 27657 |
| Pakistan | 5191 | 1203 | 3337 | 3024 | 2734 | 9341 | 92500 | 85000 | 9504 |
| Mali | 18563 | 87562 | 25688 | 17723 | 39736 | 52300 | 37700 | 19900 | 16092 |
| BURKINA FASO | 5236 | 187 | 0 | 57 | 57 | 1700 | 13800 | 18300 | 13038 |
| Uganda | 34061 | 12179 | 7061 | 13558 | 9188 | 15080 | 12500 | 12100 | 4962 |
| India | 16318 | 5999 | 6815 | 6608 | 979 | 7013 | 15500 | 22300 | 10118 |
| Senegal | 8380 | 7313 | 2611 | 2445 | 2201 | 1511 | 3300 | 4000 | 3222 |
| Bangladesh | 12732 | 7893 | 7232 | 2479 | 5461 | 6467 | 5000 | 6400 | 1272 |
| Tanzania | 106306 | 107895 | 69135 | 57749 | 108861 | 139873 | 110500 | 103700 | 6621 |
| Nigeria | 5065 | 1418 | 1256 | 2204 | 3499 | 3741 | 4700 | 1400 | 1538 |
| Somalia | 13381 | 6525 | 720 | 1206 | 2446 | 735 | 2900 | 0 | 0 |
| Others | 29294 | 10635 | 5163 | 1764 | 2285 | 7691 | 11645 | 8000 | 3348 |
| TOTAL | 805927 | 933085 | 712924 | 827879 | 812586 | 1016009 | 1174345 | 1071100 | 480520.15 |

Source : GAIG

Country-wise imports of Sesame seeds in China



Inventory of Sesame at Chinese Ports



China Imported 480,000 MT of sesame seeds from January to July 2023

The Inventory at Qingdao port is 95,000 MT, and in other ports in China is 20,000 MT

Challenges in imports of sesame seeds to China

- Currency fluctuation
- Yuan at 7.32 per US dollar
- Uneven Demand
- High Price
- Domestic Production

Logistics Challenges – Chad, Ethiopia and Sudan, Mr Juby Moothedom (Harvest Afrique Grains Cereals & Legumes Trading Co. LLC.,)

In Sudan, logistical challenges for sesame shipment primarily revolve around port operations, the distinction between main shipping lines and Non-Vessel Operating Common Carriers (NVOCCs), and infrastructural constraints. These challenges often result in delays and complications in the sesame export process.

In Ethiopia, logistical challenges impacting sesame shipment include internal conflicts in the northern region, high inflation rates, container shortages and rising fuel costs. These challenges collectively disrupt and strain the logistics of sesame exports from the country.

Challenges in Chad related to sesame shipment logistics encompass transportation delays from Chad to Douala, congestion at the Douala port, and delays occurring at transshipment points. These challenges introduce significant hurdles and disruptions to the sesame export process in the region.

Challenges and Opportunities for Turkey in the Current Landscape - "A Closer Look at the Turkey Sesame Market", Mr Tahir Onur Yalcin - Akdeniz Fora Gida, Turkey – AFG Trading DMCC, UAE

Current Landscape

- Turkey’s market share growth as a Central Point
- Shift to Turkish hulled sesame due to ETO problems in Indian Sesame
- Benefits of shorter transit times
- Increase in local sesame sellers
- Impact on exporters and traders
- Changing buyer habits
- Consequences of buying locally and end up with low stock levels

Regulation and Documentation Related Issues

- Rejection of Nigeria’s sesame
- Fake certificates for sesame from Chad
- Impact on imports

Price Challenges: Balancing Quality and Cost

- High sesame prices
- Exploration of cheaper options
- Considerations for factories and customers

Dealing with Defaults

- Impact of defaults on market stability
- Misconceptions about market prices
- Effects on buyer decisions

Economy and Currency challenges

- Depreciation of the Turkish Lira
- Foreign currency shortages
- Rising interest rates
- Impact on the cash flow

Conclusion

- Turkey’s position as a logistic hub
- Changing trade dynamics
- Economic challenges
- Defaults and market issues

Session-4: Technology, Innovation and Food Safety



From left,

Mr Lior Peleg, Equinom Ltd

Mr Mukul Gupta, Shakumbhri Expo Impo Ltd

Mr Faisal Nisar, SGS Pakistan (Private) Limited

Ms Bijou Kuzimbu, Lutheran World Relief (LWR)

Mr Oussama Bitar, Buhler AG (Middle East)

Mr Vishal Pagariya, Bharat Engineering Company ([online](#))

Mr Oussama Bitar, Buhler AG (Middle East) ([online](#))

Chair Person: Mr Mukul Gupta - Shakumbhri Expo Impo Ltd.

**Developing New Sesame Varieties Based on Desired Traits for Tahini,
Mr Lior Peleg - Equinom Ltd (Online)**

Tahini is a \$2.0B market with a CAGR of six per cent (6%) estimated to reach \$3.7B in 10 years

Key drivers for increasing demand

- Health trends
- Population growth
- Migration of Middle Eastern and Asian populations to Western countries
- Increasing popularity of Humus and Tahini based Dips in major countries (US, Europe, AUS)

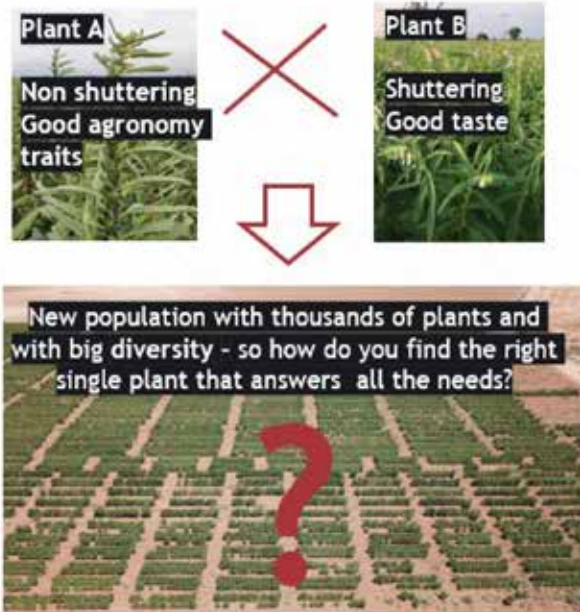
What do Tahini producers look for?

- Sweet flavour (non-Bitter)
- White to light-beige color
- Juiciness
- Good aroma and flavours (aromatic molecules)
- Low FFA, oil content above 50%
- Cost
- Cleanliness and purity
- Food safety, tractability, and consistency

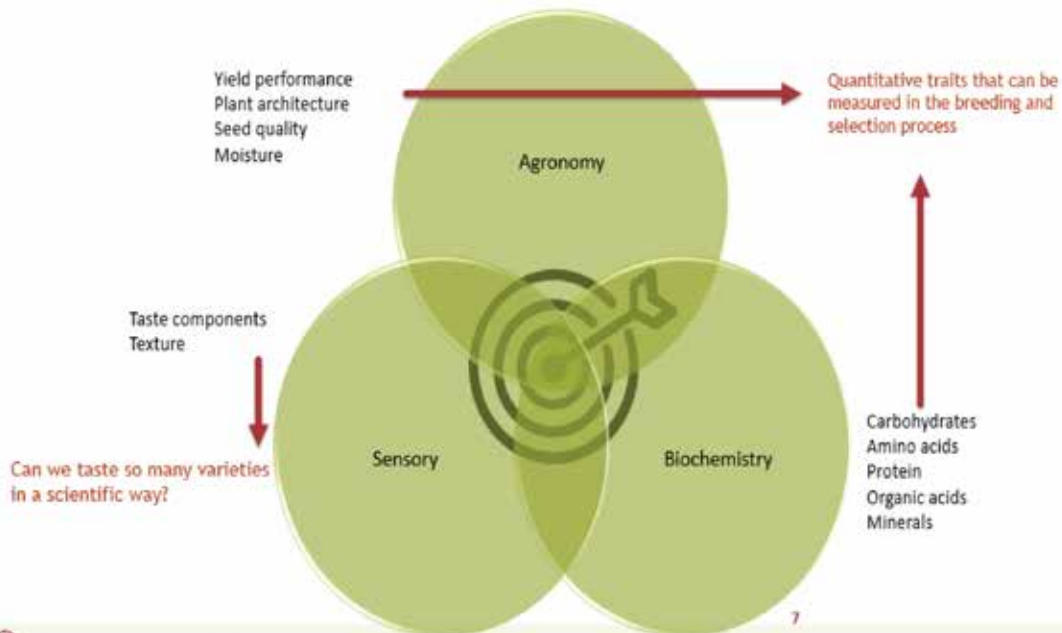
The Golden Standard of sesame varieties for Tahini:

- Humera – Ethiopia
- Gadarif – Sudan
- Escoba Blanca – Paraguay
- Anhai – Brazil

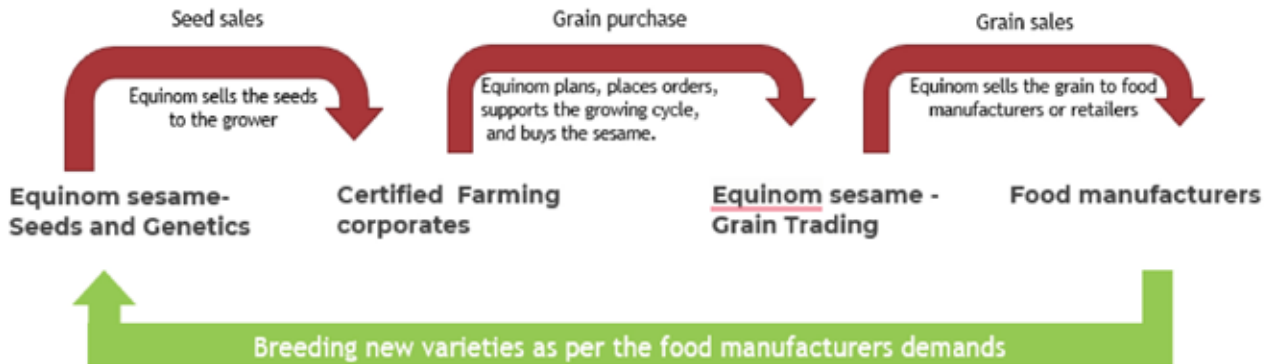
How do we do classic plant breeding for sesame?



Multi-Traits Characterization



The first End-to-End model for Tahini producers and farming corporates



Food manufacturers can now source premium sesame from a compliant, safe and consistent source. They also become partners in developing the next generation of sesame with desired food functionality.

Pakistan Sesame Seed Quality and Food Safety, Mr Faisal Nisar - Country Business Head, SGS Pakistan (Pvt) Ltd.

- SGS is a Testing, Inspection, and Certification company.
- The company has 65+ years of experience in Pakistan and has over 11,000 employees.
- They handle 100+ commodities in Pakistan with 11 offices and 2 laboratories.

COUNTRY WISE REQUIREMENTS

- EXPORT FROM PAKISTAN

CHINA

Natural Machine Cleaned Sesame:
Purity: 99% min
FFA: 1.5-2% max
Oil : 48-50% min
Moisture: 5-6% max

EUROPE:

Hulled Sesame:
Purity: 99.99% min
FFA: 1.5% max
Oil : 50-52% min
Moisture: 5-6% max
Salmonella: Absent
Total Aflatoxin: less than 1.4 PPB
E.coli: Absent

JAPAN:

Natural Sesame:
Purity: 99.95% min
FFA: 1.5-2% max
Oil : 50-52% min
Moisture: 5-6% max
Total Aflatoxin: Less than 1.4 PPB
Allergens
Pesticides (2,4D, chlorpyrifos, BHC, DDT, etc.)

KOREA:

Natural Sesame:
Aflatoxins (B1, B2, G1, G2)
Lead
Cadmium
Ethylene oxide
Bezo[a]pyrene
Pesticides (510 pesticide list)

TURKEY:

Natural Machine Cleaned Sesame:
Purity: 99% min
FFA: 1.5-2% max
Oil : 49-50% min
Moisture: 6% max

Testing capabilities in sesame seeds

ISO 17025 Accredited Laboratories

USUAL TESTING

- Purity/ Admixture
- Total damaged
- Dead seeds

NUTRITIONAL PARAMETERS

- FFA
- Oil Content
- Moisture
- Protein
- Fiber
- Ash
- Energy, Carbohydrates

CONTAMINANT & TOXIN TESTING

- Total Aflatoxin
- Heavy metals
- Other toxins

PESTICIDE TESTING

- SGS Germany (600+ pesticides)
- SGS Bulgaria (Codex pesticides)
- SGS Vietnam (510 pesticide, ETO)

SGS Vietnam KFDA approved lab for Korea Tenders

GMO, COVID AND MICRO TEST

- Salmonella
- E.coli
- Other micro-organisms
- Genetic modified organism (GMO)
- COVID



Testing for sesame seeds

Basic quality testing - Moisture, FFA, Oil content, Purity

Inspection, Seed sampling, Loading supervision, fumigation, and pest management.

Inspection - to ensure nothing goes unnoticed

We work for you to protect your interests and reduce risk, ensuring your commodities meet global standards for quality and excellence.

All inspection services are carried out in accordance with FOSFA and other industry-agreed requirements. The services that we provide are eminently trustworthy and are recognized worldwide, and our certificates are accepted by global trade partners, banks, and other financial institutions.

Our proactive inspection services include:

- Pre-shipment inspection
- Loading supervision
- Quality and quantity inspection
- Cleanliness inspection
- Tally
- Sampling

Fumigation and Pest Management

Our operations have been awarded ‘Approved Fumigator’ status from Gafta.

Our global fumigation specialists have developed innovative solutions to minimize your risks – whether for vessels, barges, containers, storage facilities, or even offices. With a unique global network, our skilled and mobile teams provide a fast, reliable service wherever you need it.

- Fumigation
- Disinfection
- Treatments
- Gas-free detection
- Removal & Disposal
- Pest management

Other Services for Sesame Seed Industry

| Farm Level | Manufacturer or Processor |
|--|---|
| <ul style="list-style-type: none"> • Seed Testing • Precision Farming • Application of fertilisers and pesticides through drones • Crop Surveys • Seed Trials • Pesticide and Fertilizer Trials • Global Gap Certifications | <ul style="list-style-type: none"> • Shelf-Life Study • Claims Verifications • Nutritional Testing • Labelling and Translations |

Sorting for Aflatoxin, Mr Brendan O'donnell - Global Director, Nuts and Dried Fruit, TOMRA

TOMRA is present in 100+ countries with 4600 employees globally. They have 50 years of experience in the field. Also, we are a technology leader globally.

Aflatoxin – A naturally occurring toxin created by fungal mold continually challenging growers and processors (Colourless, odourless, and hard to detect).

Types of Aflatoxin – Four types of Aflatoxin on splits under UV Blacklight: AFB1, AFB2, AFG1 and AFG2.

B1 / B2 named for blue fluorescence G1, G2, Y named for the green and yellow fluorescence

Every country has their own limits and testing procedures

Not having a uniform globally agreed sampling and testing method creates uncertainty for both buyers and sellers

15 PPB (EU), 20 PPB (USA), 20 PPB (China), 10 PPB (India), 10 PPB (Japan)

Inconsistent sampling procedure rules from one country to the next adds to the demands of aflatoxin control.

AFLATOXIN INFECTED ALMOND

SAMPLES TAKEN

The true cost of rejection

REJECTED

- Ocean Freight x2: (\$6,000-\$10,000)
- Cleaning Cost: (\$5,000-\$10,000)
- Re-Packaging Cost: (\$4,000- \$5,000)
- TIME, LABOR: (\$5,000-\$20,000)
- Brand Reputation: unknown
- **TOTAL: \$20,000 - \$45,000**
- NOT accounting for damage to reputation

TOMRA

CASE STUDY: AFLATOXIN DETECTION WITH TOMRA DETOX™

Case study: • California almond Processor had a load of almonds rejected from Japan for Aflatoxin • (This was very clean J-Spec product with less than 1% Insect Damage) • 20' container, 36,000 lbs. run through TOMRA DETOX™ equipment • Almond Board of California involved as a non-biased third-party monitoring testing and sampling • Method: • 3 samples from incoming product (6 tests total) • 3 Samples post TOMRA DETOX™ sorting (6 Tests Total) • 3 samples from TOMRA DETOX™ sorter reject stream (6 tests total).

SUMMARY

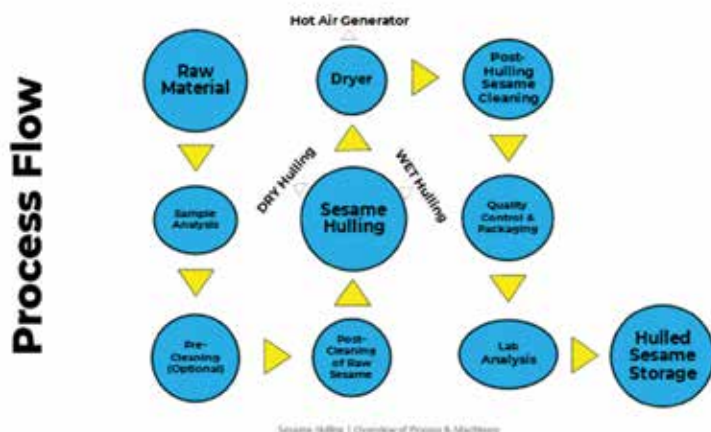
When it comes to **total cost**, risk to **brand reputation**, damage to **industry reputation**, we urge the use of **every tool** at our disposal

- Farm Management
 - Sanitation, irrigation (if possible), strong pest control program
- Storage Management
- Sorting for Damage (correlation vs. causation)
- TOMRA Detox™ Sorting (final safeguard)

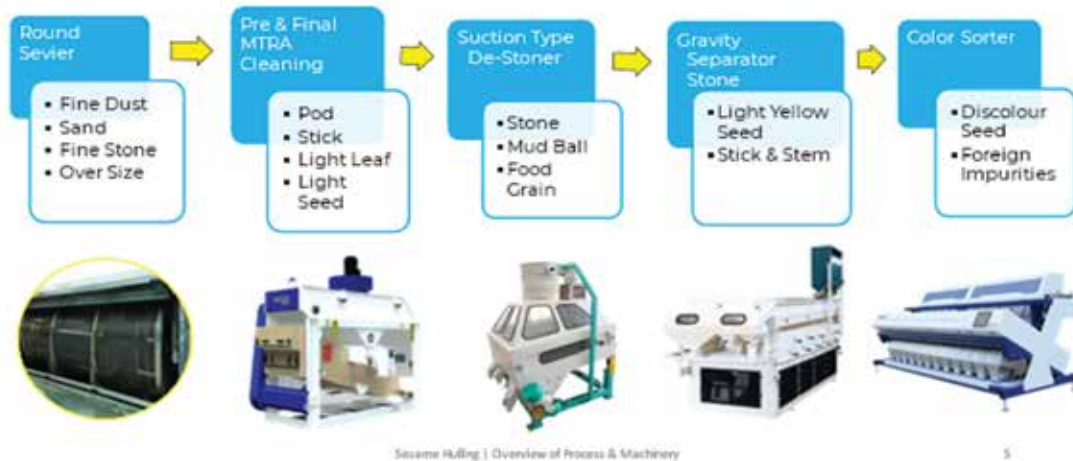


Sesame Hulling: Comprehensive Overview of Process and Machinery, Mr Vishal Jain - Business Development Manager (Bharat Engineering Company)

Sesame hulling: Steps involved in hulling



Raw Sesame Cleaning Process



Sesame Hulling: Why it Matters!

Sesame Hulling Market Value

- Food Industry: Bakery products, confectionery, snack food, sweet, spread, dressing & Sauces, Asian Cuisine.
- Tahini
- Nutritional Supplements
- Pharmaceuticals

Value Edition

- Transforming low-priced, discolored, and crushing-grade seeds into high-value hulled sesame seeds.
- Ensuring Premium Quality Output (99.9% Purity)
- Meeting the High Demand in Developing Nations

WET Hulling Sesame Seed (Bakery Hulled Sesame)

- Lye Process Technology
- Water Wash for Quality Enhancement
- Versatility with Various Raw Sesame Inputs
- Input Quality Dictates Hulled Sesame Quality
- Manual Sampling for Input Selection
 Criteria: Detecting Discolored Seeds in Hulled Sample
- Machine Area: 10,000 sqft
- Process Utility: 5000 sqft



DRY Hulling Sesame

(Tahini Hulled Sesame)

- Dry Friction Process Technology
- Mechanical Cleaning for Sesame Husk Collection
- Washing to obtain cleaned hulled seed
- Consistency Matters: Matching Raw Sesame in Color, Size, and Origin
- Machine Area: 10,000 sqft

Sesame hulling | Overview of Process & Machinery



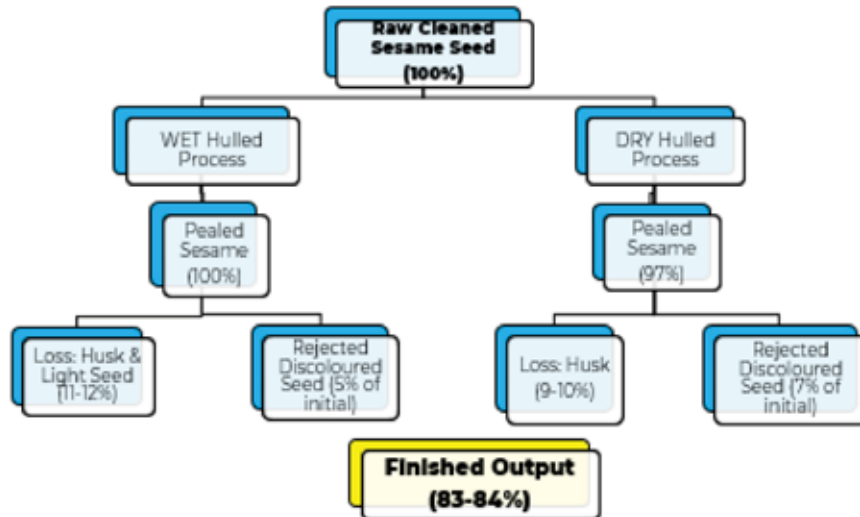
Wet Hulling: Managing Wastewater Discharge

Hulling process involves water

- This wastewater contains oil, sesame husk, BOD, COD, and other impurity that need to be treated before discharge from the factory
- Solid sesame husk is collected via sieving operation and moisture is removed by screw pressing and dried
- the rest of water that contain waste water ETP process to reduce the BOD and COD contain
- ETP process in general take 24hr working period



Hulled Process Recovery



Sesame Hulling | Overview of Process & Machinery

Rejection Value

Husk:
Animal Feed

Colour Sorter
Rejection:
Cold Press Oil & De-fated Cake

Dry & Wet Hulling

Water Ratio
 WET Hulling: Requires a 1:6 sesame to water ratio.
 DRY Hulling: Requires a 1:2 sesame to water ratio.

Husk Removal:
 WET Hulling: Husk is removed by washing it away with water.
 DRY Hulling: Husk is collected via mechanical sieving.

Seed Appearance
 WET Hulling: Produces shinier, whiter seeds.
 DRY Hulling: Yields off-white seeds.

WET hulled require ETP process as compared to dry hulling process.

Recent Innovations in Grading, Sorting, and Defects Detection in Sesame Seed, Mr Oussama Bitar, Area Sales Manager, Middle East Countries, Buhler

Sesame Process Flow



Cleaning grading and sorting flow for Sesame - Buhler solutions from cleaning to packing

Naturel Sesame seeds
 Tertiary sort at 1000kg/h/c



Design Removing discoloured sesame seed by resorting reject.

| Mass Balance | kg | in % |
|---------------------|-------------|---------------|
| Accept Volume | 7.28 | 88.00 |
| Reject Volume | 1.00 | 12.00 |
| Total Volume | 8.28 | 100.00 |

| Analysis | Input | Accept | Reject | Efficiency |
|----------|--------|--------|--------|------------|
| Defects | 10.00% | 0.01% | 12.00% | 99.90% |





SORTEX J Spectra Vision - World's best reject concentration for mainstream applications



Click to visit Website

Click to open Brochure

- High-capacity color sorter for grains & pulses, coffee, seeds, nuts and many other applications
- Best reject concentration minimizing resorting and waste
- Available in 1 to 7 chutes
- Developed in 2021 with the most advanced technology available on the market
- Industry 4.0 with SORTEX Monitoring System for real time insights and Smart ModeAssist
- CE, NR-12 and NRTL* (options)

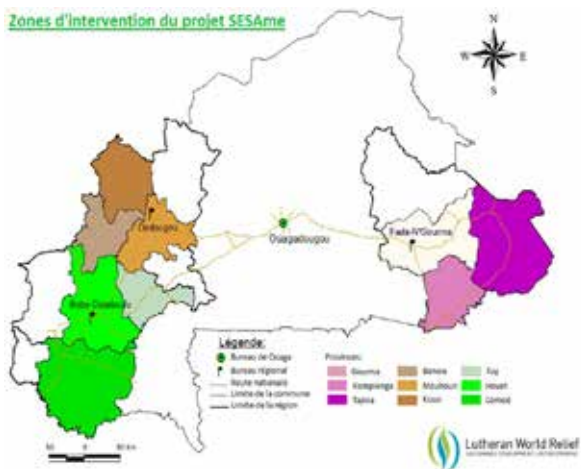
Special Address: 1

Lutheran World Relief's Initiative and Impacts on Burkina Faso Sesame Value Chain, Ms Kouka Zoungrana Yameogo - Lutheran World Relief



- 2023 : 405,135 ha of sesame areas with an expected sesame volume of 227,829 MT
- Big importing countries of Burkina sesame viz., Singapore (29.4%), China (27.2%), Togo (25%), Japan (7.1%) and Ghana (4.6%).

Zones d'intervention du projet SESAME



Project Overview

Funding and duration: \$29.5 million USDA Food for Progress (2016-2025)

Strategic partners and collaborators: LWR, Government of Burkina Faso, Afrique Verte, and Niti-dae, Interseb, and private sector actors.

Project objectives: Increase quality sesame production and access market opportunities for Sesame producers/exporters

- **Activities:** Market access, capacity building, financial services, and infrastructure
- **Challenges:** Weak organization of farmers, limited access to finance, poor sesame quality, weak government institutions to support sesame export.

Project major Achievements

- Increased number of functional co-operatives: 45 (2018) to 249 (2022)
- Increased areas of sesame (5,332 ha in 2018 to 137,346 ha in 2022) as well as yield
- The purity level of the sesame sold by co-operatives has reached more than 95%
- Value of sales (\$): 2,834,116 to 213,513,661
- Number of Contracts: 3,458 contracts
- Increased % of producers selling in groups (17% in 2018 to 86% in 2022)
- Establishment of a pricing committee and 'mobile brigade' control
- Legislative text being developed by Ministry of Trade and Agriculture with the support of the project
- Drafted a constitution for the proposed African Sesame Alliance with the support of the project.

LWR's Strategic Priorities

- Keep supporting Interseb in the alliance.
- Push for legislation on pricing committees and mobile brigades with Government ministries.
- Expand the program to more co-operatives, even with security challenges.
- Improve sesame quality by reducing contamination risks and pesticide residues.
- Continue facilitating sesame commercialization in the international market (international trade standards and non-trade barriers)
- Implement pilot of the traceability system of the Burkina Faso sesame
- Involvement of exporters in the traceability initiative
- Burkina Faso country remains a location for sesame business

Special Address: 2

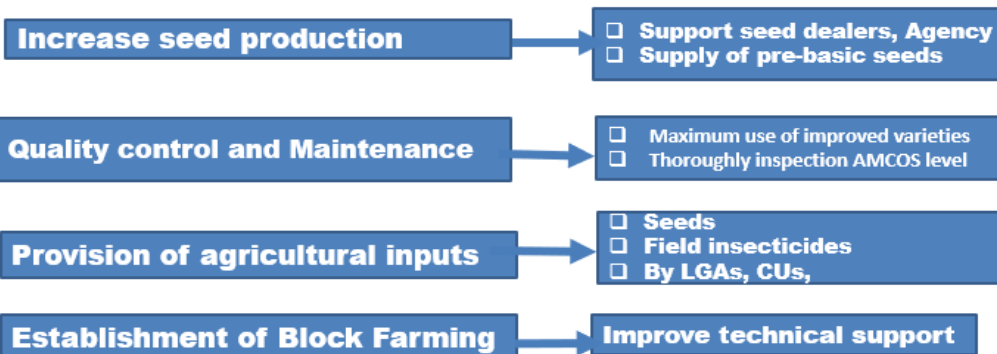
Efforts by Government to Improve Yields and Income Level of Farmers Connected with Sesame, Mr Joseph Nzunda - National Coordinator of Sesame Research Program Tari-Tanzania Agricultural Research Institute

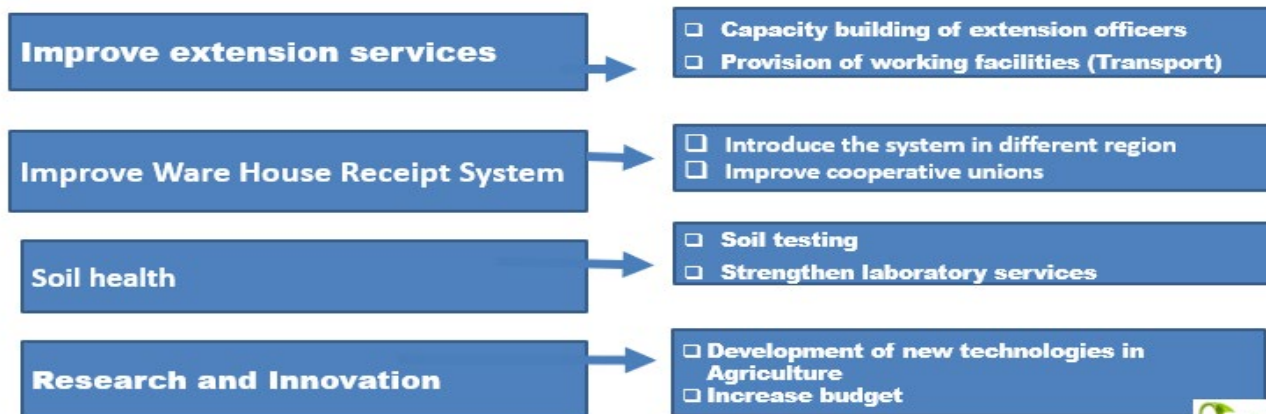


General Introduction:

- Tanzania is among the top 10 sesame producers in the world (FAOSTAT,2023).
- Currently, Tanzania's Sesame export is estimated at 630,000 MT.
- The government is supporting the crop, and the crop is one of the strategic crops in some regions such as Lindi

Efforts by government to improve yields and income level of farmers connected with sesame

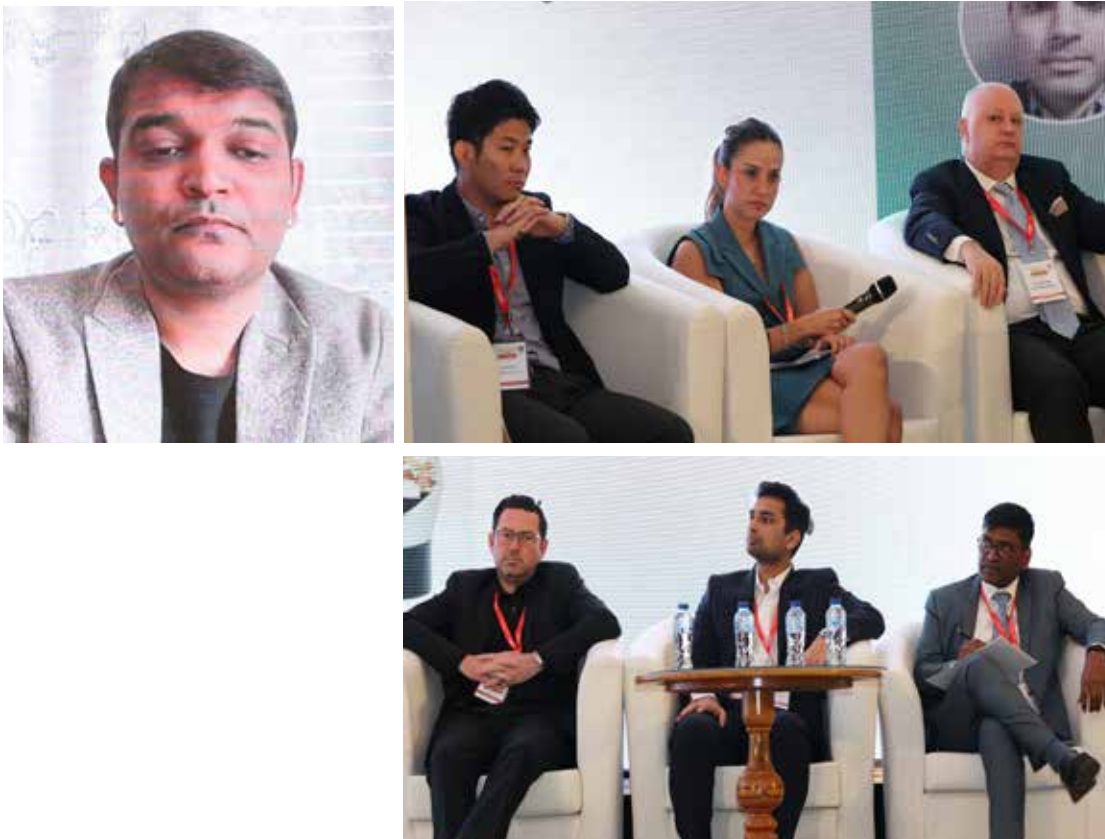




Recommendation and Conclusion

- To motivate farmers to grow more sesame, it's crucial for buyers to offer fair prices. We encourage buyers to participate because our selling process is convenient, with online auctions coordinated by TMX.
- Farmers have the land and quality sesame varieties to meet buyer demand. Expanding the land for sesame can boost production.
- To meet global sesame demand, all stakeholders need to collaborate on regional plans for re-search, production, and processing.

Session-5: Sesame Consumption Markets: Trends and Opportunities



From left,

Mr Jay Chandarana, Dhaval Agri Exports LLP

Mr Taichi Abe, Mitsui & Co Ltd

Ms Elif Narin, Rasagra GIDA

Mr David Buttery, Global Grains & Ingredients Limited

Mr Ghazwan Mousallati, Leno Gulf FZC

Mr Mihir Parmar, Mamta Commodities

Mr G Srivatsava, Eventell Global Advisory Pvt Ltd (www.sesameinfo.in)

Chairperson: Mr Jay Chandarana - Dhaval Agri Exports LLP

European Sesame Market Trends & Outlook, Mr David Buttery – CEO, Global Grains & Ingredients Ltd.

EU Supply (Mt) by origin

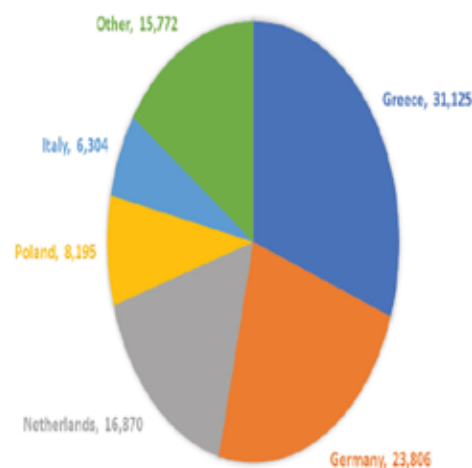
EU Supply (Mt) by origin

| Origin | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 YTD |
|------------|---------|---------|---------|---------|---------|----------|
| Nigeria | 18,445 | 18,857 | 14,729 | 24,296 | 23,007 | 14,111 |
| India | 60,169 | 59,784 | 59,246 | 17,903 | 18,973 | 10,433 |
| Türkiye | 2,353 | 1,942 | 7,660 | 16,341 | 11,158 | 3,939 |
| Pakistan | 1,214 | 2,608 | 767 | 10,723 | 7,045 | 6,719 |
| Uganda | 2,256 | 4,801 | 3,441 | 5,476 | 6,798 | 2,740 |
| Brazil | 0 | 553 | 1,860 | 5,230 | 4,698 | 2,894 |
| Sudan | 13,823 | 14,211 | 10,640 | 3,879 | 4,626 | 4,227 |
| Mozambique | 2,512 | 2,532 | 3,319 | 2,679 | 4,491 | 1,583 |
| Guatemala | 3,325 | 3,560 | 3,112 | 5,599 | 3,815 | 1,931 |
| Egypt | 775 | 947 | 2,096 | 4,573 | 3,769 | 1,788 |
| Somalia | - | 867 | 649 | 7,020 | 2,856 | 7 |
| Mexico | 2,771 | 1,655 | 2,285 | 3,200 | 2,472 | 556 |
| Paraguay | 1,796 | 1,305 | 2,949 | 8,416 | 2,096 | 1,221 |
| Bolivia | 754 | 783 | 1,276 | 2,044 | 1,866 | 320 |
| Ethiopia | 6,830 | 4,652 | 4,439 | 8,551 | 1,739 | 627 |
| Mali | 1,041 | 1,211 | 1,656 | 1,547 | 1,567 | 356 |
| China | 373 | 1,098 | 4,032 | 4,306 | 1,543 | 1,697 |
| R O W | 5,859 | 8,043 | 7,125 | 12,632 | 5,241 | 4,383 |
| Total | 124,297 | 129,408 | 131,280 | 144,416 | 107,761 | 59,533 |

Average annual price €/MT

| Origins | 2018 | 2019 | 2020 | 2021 | 2022 |
|------------|---------|---------|---------|---------|---------|
| Nigeria | € 1,282 | € 1,644 | € 1,523 | € 1,458 | € 1,855 |
| India | € 1,462 | € 1,865 | € 1,612 | € 1,583 | € 2,127 |
| Türkiye | € 1,667 | € 2,235 | € 1,662 | € 1,653 | € 2,036 |
| Pakistan | € 1,553 | € 1,745 | € 1,667 | € 1,617 | € 2,134 |
| Uganda | € 1,549 | € 1,729 | € 1,791 | € 1,646 | € 1,926 |
| Brazil | € 1,583 | € 1,378 | € 1,127 | € 1,214 | € 1,667 |
| Sudan | € 1,225 | € 1,476 | € 1,298 | € 1,216 | € 1,590 |
| Mozambique | € 1,429 | € 1,700 | € 1,569 | € 1,494 | € 1,978 |
| Guatemala | € 1,754 | € 2,331 | € 2,025 | € 1,749 | € 2,549 |
| Egypt | € 1,941 | € 2,128 | € 2,189 | € 1,746 | € 1,964 |
| Somalia | | € 1,797 | € 1,435 | € 1,608 | € 2,047 |
| Mexico | € 1,995 | € 2,379 | € 2,250 | € 2,014 | € 2,493 |
| Paraguay | € 1,557 | € 1,773 | € 1,408 | € 1,500 | € 1,903 |
| Bolivia | € 2,006 | € 2,146 | € 2,062 | € 1,773 | € 2,049 |
| Ethiopia | € 1,327 | € 1,830 | € 1,792 | € 1,461 | € 1,835 |

EU Sesame imports by top 5



Imports by EU Nations

| Row Labels | Sum of 2022 | Sum of 2021 | Sum of 2020 | Sum of 2019 |
|--------------------|----------------|----------------|----------------|----------------|
| Greece | 31,125 | 38,887 | 30,867 | 31,302 |
| Germany | 23,806 | 32,635 | 29,433 | 25,608 |
| Netherlands | 16,870 | 21,209 | 22,582 | 22,119 |
| Poland | 8,195 | 12,368 | 10,428 | 11,228 |
| Italy | 6,304 | 9,497 | 8,727 | 8,026 |
| Spain | 4,834 | 5,341 | 4,704 | 5,108 |
| France | 4,339 | 5,881 | 7,318 | 7,625 |
| Romania | 2,043 | 2,167 | 2,468 | 2,665 |
| Bulgaria | 1,842 | 2,394 | 1,718 | 1,647 |
| Belgium | 1,062 | 2,402 | 2,386 | 2,785 |
| Croatia | 931 | 1,004 | 797 | 789 |
| Austria | 721 | 1,139 | 1,410 | 1,766 |
| Grand Total | 102,072 | 134,925 | 122,838 | 120,666 |

EU Regulations to know for exporters and re-exporters

- Regulation 396 2005 Residues CELEX_32005R0396_EN_TXT
- Regulation 2019 1793 official controls CELEX_32019R1793_EN_TXT
- Regulation 2020_7491_Chlorates CELEX_32020R0749_EN_TXT
- Regulation 2020_1540 amending 201_1793 20201023 CELEX_32020R1540_EN_TXT (Indian Sesame testing for Pesticides)
- Regulation 2023_174 increasing official controls
- 20230505 - 2022_915 repealing regulation 1881_2006 on maximum levels for certain contaminants in food and repealing Regulation (EC) No 18812006 CELEX_32023R0915_EN_TXT

Japan Sesame Markets, Mr Taichi Abe - Mitsui & Co Ltd

2023 Japanese import outlook

| | The first half of 2023 | The last half of 2023 forecast | 2023 forecast | 2022 | comparison |
|--------------|------------------------|--------------------------------|----------------|----------------|-----------------|
| TOTAL | 96,867 | 65,080 | 161,947 | 179,067 | △ 17,120 |
| NIGERIA | 34,444 | 27,000 | 61,444 | 72,415 | △ 10,971 |
| BURKINA FASO | 21,825 | 9,000 | 30,825 | 25,423 | 5,402 |
| MOZAMBIQUE | 13,351 | 3,500 | 16,851 | 15,387 | 1,464 |
| MYANMAR | 3,169 | 500 | 3,669 | 5,513 | △ 1,844 |
| TANZANIA | 2,918 | 10,000 | 12,918 | 15,477 | △ 2,559 |
| MALAWI | 2,847 | 300 | 3,147 | 2,057 | 1,090 |
| TOGO | 2,590 | 500 | 3,090 | 1,451 | 1,639 |
| MALI | 2,470 | 1,500 | 3,970 | 4,560 | △ 590 |
| GUATEMALA | 2,439 | 1,000 | 3,439 | 3,029 | 410 |
| ETHIOPIA | 2,428 | 1,500 | 3,928 | 4,465 | △ 537 |
| SUDAN | 1,907 | 1,000 | 2,907 | 3,369 | △ 462 |
| EGYPT | 1,374 | 300 | 1,674 | 1,194 | 480 |
| PARAGUAY | 1,319 | 4,000 | 5,319 | 8,449 | △ 3,130 |
| MEXICO | 865 | 1,000 | 1,865 | 1,389 | 476 |
| PAKISTAN | 574 | 1,000 | 1,574 | 3,926 | △ 2,352 |
| BOLIVIA | 530 | 1,500 | 2,030 | 2,640 | △ 610 |
| TURKEY | 450 | 200 | 650 | 1,191 | △ 541 |
| UGANDA | 396 | 0 | 396 | 0 | 396 |
| Others | 971 | 1,280 | 4,876 | 5,818 | △ 942 |

Due to the depreciation of the Japanese yen and increases in the import prices of sesame seeds, Japan may import less quantity of sesame in the coming months.

Depreciation of Japanese Yen



Due to the weakening of the Japanese yen and the high price of sesame seeds, import unit prices based on the Japanese yen may reach record highs in 2023.

Japanese players are consequently quite silent, especially edible players.

Sesame oil exports from Japan

| | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Total | 6,580 | 6,466 | 6,900 | 8,139 | 8,382 | 8,988 | 9,244 | 8,550 | 9,678 | 9,117 |
| USA | 4,734 | 4,597 | 5,063 | 5,687 | 5,810 | 6,143 | 6,186 | 6,066 | 6,626 | 6,299 |
| Canada | 691 | 774 | 537 | 826 | 820 | 868 | 921 | 871 | 1,190 | 902 |
| Hong Kong | 579 | 487 | 566 | 612 | 668 | 659 | 718 | 830 | 803 | 768 |
| Austraria | 32 | 64 | 50 | 73 | 103 | 88 | 78 | 77 | 103 | 236 |
| China | 242 | 159 | 96 | 124 | 98 | 148 | 130 | 131 | 125 | 160 |
| Taiwan | 82 | 17 | 34 | 117 | 169 | 171 | 138 | 88 | 130 | 132 |
| Nederland | 17 | 24 | 24 | 23 | 33 | 15 | 26 | 89 | 172 | 86 |
| Indonesia | 2 | 1 | 1 | 9 | 19 | 39 | 42 | 46 | 61 | 70 |
| Tailand | 5 | 8 | 11 | 14 | 25 | 31 | 41 | 24 | 21 | 43 |
| South Korea | 9 | 10 | 12 | 8 | 10 | 16 | 11 | 18 | 23 | 35 |
| UK | 12 | 24 | 5 | 13 | 11 | 14 | 22 | 16 | 36 | 33 |
| Germany | 22 | 13 | 54 | 51 | 44 | 76 | 89 | 50 | 60 | 32 |
| Singapore | 27 | 160 | 295 | 450 | 423 | 438 | 613 | 32 | 27 | 31 |
| Others | 128 | 129 | 153 | 131 | 148 | 281 | 229 | 213 | 300 | 290 |

The export quantity of sesame oil has increased since 2016, Japan exports around 9,000 MT of sesame oil annually with the USA being the major market.

Challenges Japan is facing

| Challenges | Solutions (Request to Suppliers) |
|---|---|
| Agrichemical residue Issues (Positive list) | 1. Educate farmers and local traders on how to use pesticides correctly. 2. To do agrichemical residue testing for the high-risk items |
| Quality Issues | To pay more attention to quality control. |
| Color seeds Issues | To educate farmers not to mix colour seeds (seeds for sowing) with the harvest |
| Contamination of foreign substances | To pay attention when packing |
| PP bag Issues | To use a white plain PP bag |
| Freight issues | To try to get free time for demurrage and detention as much as possible and use clean containers. |

Sesame Seed Market in Turkey, Ms Elif Narin - Rasagra Gida, Turkey

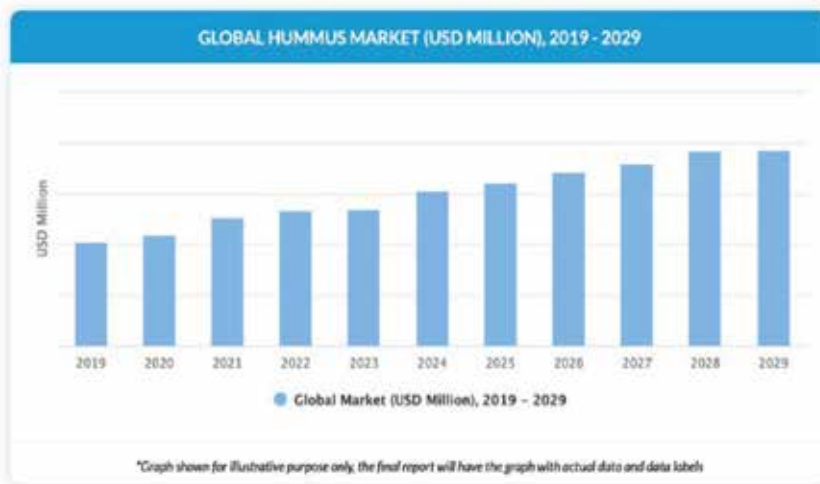
We have a Sesame hulling and Tahini production facility in the south of Türkiye in Mersin. As well as a state-of-the-art tahini facility in the USA (Seeds N Snacks LLC).

Our Daily total production capacity for tahini is 75 MTs/day;

- 50-MT daily tahini production capacity in Rasagra- Türkiye.
- 100 MTs sesame hulling capacity in Türkiye. (Organic and Conventional)
- 25 MTs daily tahini production capacity in USA as Seeds N Snacks LLC

We export 75% of the total Turkish export of Tahini a year from Türkiye

Global Hummus Market (USD MILLION) 2019-2029



In 2022, the Global Hummus Market was worth approximately USD 2,875.21 million. It is projected to grow to approximately USD 4,258.01 million by the year 2029. This growth is expected to occur at a compound annual Growth Rate (CAGR) of 5.8%.

Imported sesame seed in Turkey until August 2023

| ORIGIN | QUANTITY |
|-----------------|--------------------|
| 1 CHAD | 61.634.022 |
| 2 SUDAN | 46.801.361 |
| 3 BRAZIL | 22.117.258 |
| 4 NIGERIA | 11.342.980 |
| 5 ETHIOPIA | 8.012.185 |
| 6 NIGER | 7.727.948 |
| 7 TOGO | 4.984.160 |
| 8 EGYPT | 4.831.390 |
| 9 PAKISTAN | 4.135.790 |
| 10 GAMBIA | 3.713.420 |
| 11 BURKINA FASO | 2.502.052 |
| 12 PARAGUAY | 1.387.450 |
| 13 INDIA | 1.326.958 |
| 14 UGANDA | 1.262.250 |
| 15 OTHERS | 808.300 |
| 16 KENYA | 741.000 |
| 17 GINE | 727.937 |
| 18 MALI | 602.250 |
| 19 SENEGAL | 600.650 |
| 20 ARJANTIN | 350.000 |
| 21 GINE BISSAU | 296.414 |
| TOTAL | 185.905.775 |

Turkeys import till August 2023 reached approximately 186,000 MT.

Nigeria was the second-largest importer with 38,000 MT of imports last year. This year, however, Nigeria and Niger's faced a decline with combined imports of around 19,000 MT, the following explanations can be used to explain this:

1. Turkey’s imposition of mandatory Salmonella analysis for sesame imports from Nigeria.
2. Manufacturers’ preference for cost-effective, cleaner, and uncontaminated hybrid sesame from Brazil and Pakistan, as opposed to Nigerian sesame. This is particularly observed in the usage of hulled sesame
 - Estimated stock at the moment in Turkey is 45,000 MT.

Challenges in Turkey: Impact of external factors such as currency value, inflation, and interest rates on consumption

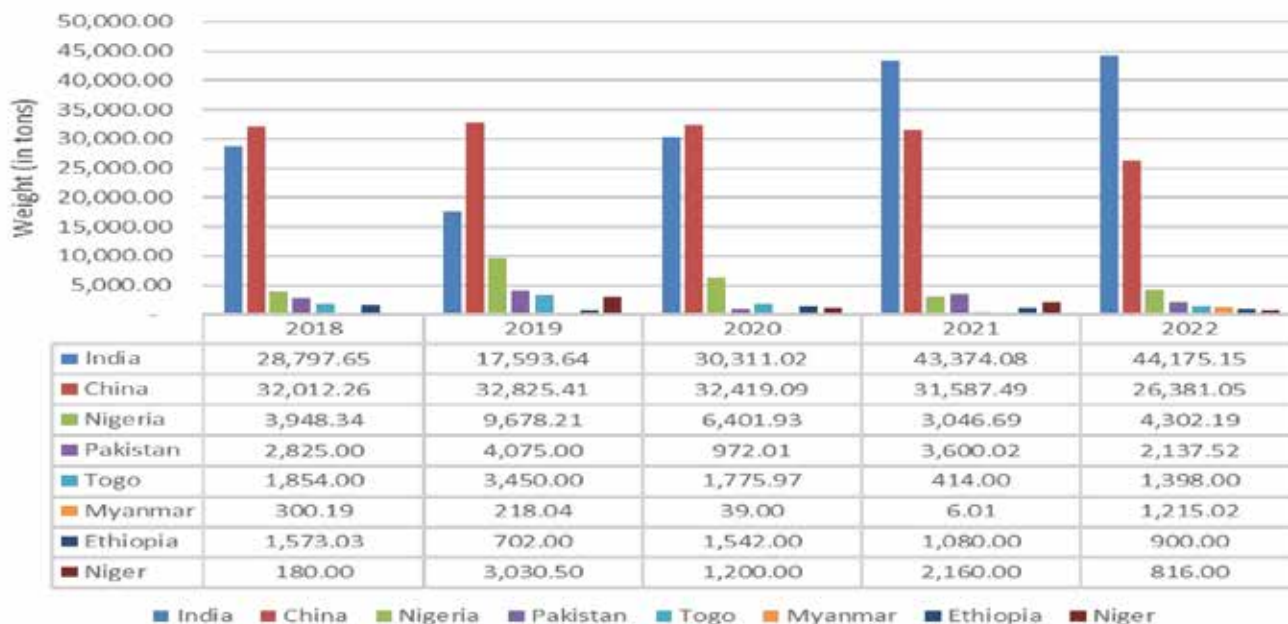
- The instability of the dollar exchange in Turkey has continued this year, leading to high inflation and reduced purchasing power for people. This has caused a drop in demand for sesame and sesame products.
- Additionally, there are restrictions on directly importing Nigerian-origin sesame to Turkey due to Salmonella problems.

RASAGRA: Our Share in the Market

- We're investing in innovation and R&D to create new sesame seed products. We've developed flavored squeezable sesame tahini sauces like wasabi, truffle, and sriracha. These will soon be available in US supermarkets.
- We're also working to raise awareness about the nutritional benefits of sesame and tahini. Our future projects include introducing hummus shakes, healthy spreads with dates and nuts, and tahini bars worldwide.

South Korea 2023 Sesame Market Trends and Outlook, Mihir Parmar – Mamta Commodities LLP

Top Import Origins of South Korea

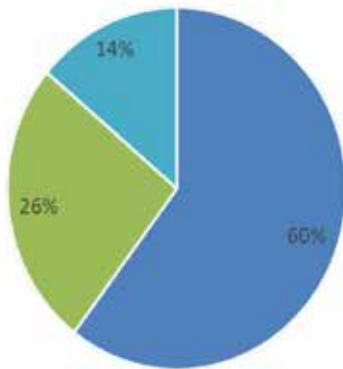


India and China together make up about 75% of the sesame seeds South Korea imports. However, China's share in this market has been getting smaller in recent years, while India's share has been getting bigger.

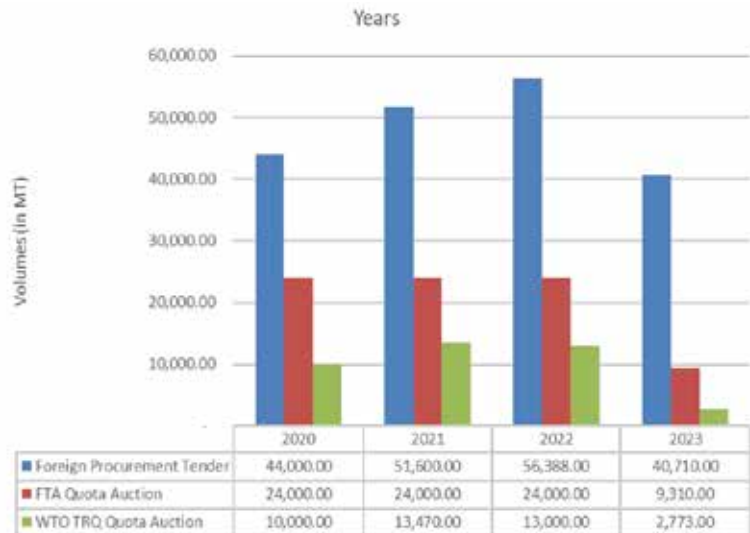
IMPORT PATTERN

Korean Import - 2022

Korean Import - 2022



■ Tender ■ China FTA ■ Private Quota



- Korea mainly imports sesame through Three main channels: I) Government Tender. II) China FTA III) Private Quota

This year, there has been a significant decrease in tender submissions. Additionally, the quota auctions have not been successful this year because importers are not showing much interest, mainly due to high auction and sesame prices.

Government Tender

| PARAMETER | HIGH QUALITY | GENERAL QUALITY |
|-----------------|--------------|-----------------|
| MOISTURE | | Max 10% |
| OIL | | Min 48% |
| VOLUME WEIGHT | | Min 580 g/L |
| FOREIGN MATTER | Max 0.2% | Max 0.5% |
| IMMATURE KERNEL | Max 0.3% | Max 0.5% |
| CORTICAL DAMAGE | | Max 10% |
| ACID VALUE | | Max 3.0% |
| OTHER COLOR | Max 0.3% | Max 1.0% |

A state-owned company called "AT" was set up to help stabilize prices, promote agriculture and fisheries, and support farmers and fishermen. It has been controlling TRQ for and on behalf of the Ministry of Agriculture, Food & Rural Affairs, and handles a significant portion of South Korea's sesame seed imports.

Trends and Outlook

Due to the COVID-19 pandemic, the global sesame seeds market was worth \$10.98 billion in 2022. It's expected to grow to \$13.82 billion by 2028, with an average annual growth rate of 3.9% during this period.

Egyptian Sesame Markets and Added Value Insight, Mr Ghazwan Mousallati - CEO LenoGulf, AgriVerdi

Egyptian markets consumption overview

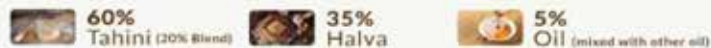
135,000 Ton +

Consumption estimate for Egypt market local

DEMAND BY TYPE



CONSUMPTION TRENDS



GROWTH IN DEMAND

8-10% growth past year with an average 5% increase in years before.

2023 - 2024 surge in demand due to Sudanese traders living or operating from Egypt.

35% - 40% surge in demand for pure sesame oil & increase in Sudanese community.

Import Trends & Preferences

30k - 35k ton Local Harvest (Official numbers differ significantly)

35k imports (70k ton is from Sudan) From Sudan via sea ports

35k imports (70k ton is from Sudan) From Sudan via Trucks

YEARLY CONSUMPTION 130,000 TONS

01.

Chad Sesame imports

is increasing annually along with Nigeria 7-10K. Major disadvantage of other origins compared to Sudan is the shipping time and formal importation option only.

02.

India's positive crop & favorable prices

This year due to India positive crop and favourable prices, a surge in Indian raw sesame was imported.

03.

India is the pioneer for Hulled sesame.

India is still the pioneer and preferred supplier for Hulled sesame. Local production is considered grade 2.

04.

Egypt is price sensitive

Egypt is very price sensitive and preferences can shift fast with favourable pricing.

05.

Not favourable for Tahini and Halva.

Brazil and Uruguay such origins not favourable for Tahini and Halva, also hulling experience still limited.

Impact of external factors

IMPACT OF ECONOMIC POLICY

Foreign Currency Laws

1 Egypt local prices of sesame prices is highest world wide due to import difficulties due to foreign currency laws.

US Dollar

2 US \$ for any imports needs to be financed from export proceeds, for trading.

Export Proceeds

3 Manufacturing purposes also need US\$ export proceeds but only exception is "differed payment up to 90 days allowed".

IMPACT ON CONSUMPTION

Less Consumption - Unfavourable price

1 Sesame is part of the Egyptian culture and sesame is consumed by all population sectors. Consumption may not grow if prices are not favourable, but consumption will remain firm. But again additives may be increased to control costs

Exports

2 Sudan local market will be dependant on Egypt. Exports of super market goods move daily in truck to Sudan. Private label is starting from previous Sudanese manufacturers that re located to Egypt.

Other factors affecting industry

FARMING PRACTICE

- It is time to work together and empower farmers to understand the side effects on trade due to chemical residues. Pesticides and herbicides will limit our work forever.

SUDAN GENERAL SITUATION

- We are back on track with operations moving from port sudan.
- However local traders are overpricing produce due to war and neighbouring countries accepting high prices due to factors discussed.
- New season will exist: 60% of past years average. My predictions is most produce will be going manufacturers of Tahini, and halwa. Not much appetite will come from crushing grade markets.

Demand forecasts



130,000 Local Consumption

- Local demand will always increase in steady rate (5%+) with the population due to cultural of sesame seeds usage.
- Sesame oil consumption will show a growth due to Sudanese community increased of approx 300,000. Also Sudanese local markets will depend on exports from Egypt since most local factories in Sudan are out of operation.
- This will also reflect in Locals consumption of pure sesame oil due to richness of pure sesame oil taste.



Re-Export Trends

- Raw sesame re-export or export is not and will not be competitive from local crop or Sudanese re-export as Egyptian. This is due to economic factors I will explain next. But Sudan will have steady demand on Tahini and Halwa from Egypt.



Added value products of sesame

- Exports of Tahini, Halwa, and hulled sesame. Is and will see continuous growth due to the demand and regulations of foreign currency. This is a major driver today in Egypt, and without exports it is very difficult to operate both trading and manufacturing business.

ACHVA since 1929, Mr Yoav Mallach - Achdut Ltd

About ACHVA

- Achdut (Achva) is one of the leading food manufacturers in Israel, which was established in 1929, Specializing in sesame products such as our leading item Tahini, Halva, and various other bakery products.
- Produces over 96 MT of tahini per day
- Achdut has the largest market share in Israel for sesame products- Tahini and Halva, and also sugar-free bakery goods
- Achdut is a leading exporter amongst health and ethnic markets all over the world

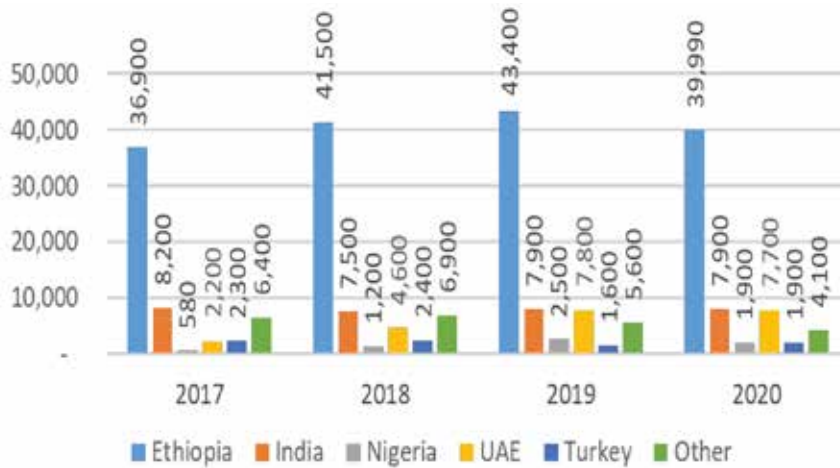
Tahini In the world

- The rising popularity of Middle Eastern flavors and superfoods has led to strong demand for Tahini products in recent years. Worldwide, Tahini consumption has been increasing by over 10% annually for the past four years.

Israel Sesame Market

- Approximately 92% of the Sesame consumption in Israel is for tahini production
- Israel’s sesame seed consumption is based mainly on the Ethiopian supply

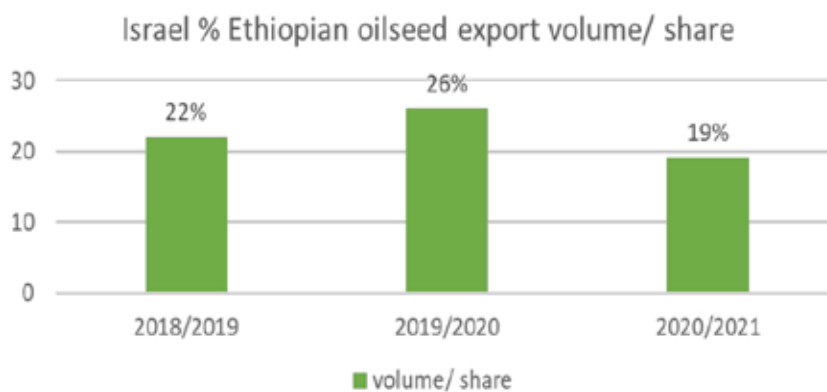
Israel’s sesame imports by country



Ethiopia oilseeds export to Israel



Israel % Ethiopian oilseed export volume/ share



Special Session on Jordan Sesame Industry

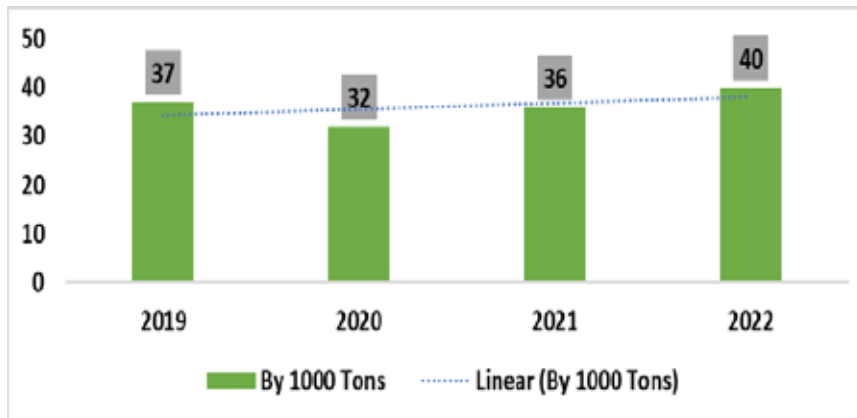


Sesame Jordanian Market Insights - Facts, Origins & Industries,
Mr Mohammad Abu Odeh, CEO -Abu Odeh Bros. Co. Ltd.

Imported Sesame Quantities/ MT

| Total Sesame Imported by Jordan (2019- 22) | | | |
|--|-------|-------|-------|
| 2019 | 2020 | 2021 | 2022 |
| 37000 | 32000 | 36000 | 40000 |

Historical Trend- Jordanian Market Imports.



6 Main Tahini Applications (Arabic Cuisine).

- Main ingredient with chickpeas (Humus).
- Protein marination (Meat & Poultry).
- Salad dressing.
- Replacement for peanut butter.
- Side dip.
- Replacement for Dairy.

Thanking.,

We also express our gratitude to all the speakers, presenters, authors, and contributors who shared their valuable insights and research findings during the conference. Your contributions have enriched these proceedings, making them a valuable resource for the global sesame and peanut community.

We would like to extend our sincere thanks to our sponsors, whose support has been instrumental in making this conference and its proceedings possible. Your commitment to advancing research and industry in the field of sesame and peanut is greatly appreciated.

Once again, thank you all for your dedication and hard work. We look forward to continuing our collaborative efforts in the pursuit of knowledge and progress in the world of sesame and peanut.

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