



Global Sesame Seeds Market

Market size, segmentation, competitive landscape and outlook

2021-2031



Moving forward, together



Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

ANDREY SHEVCHENKO, Managing Partner

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Indicator	Value
Market size (2025)	USD 8.9 bn
Forecast (2031)	USD 13.1 bn
CAGR (2021-2031)	6.6%
Study period	2021-2031
Largest region	Asia-Pacific · 42.4%
Fastest-growing region	Latin America · 8.1%
Market concentration	Low
Licence	Individual / Company

The global sesame seeds market reached USD XXX billion in 2025 and is forecast to expand to USD XXX billion by 2031, advancing at a XX% CAGR. Asia-Pacific accounted for XX% of market value, supported by China's large import requirement and the established food-processing industries of India, Japan and South Korea. Food ingredients represented XX% of demand, while hulled seeds gained share as bakery, tahini, snack and ready-meal manufacturers tightened purity and food-safety specifications. Expansion of Brazil-to-China trade, investment in African cleaning and hulling capacity, and demand for traceable, residue-compliant supply will reshape procurement through 2031.

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Executive summary

The global sesame seeds market reached USD XXX billion in 2025 and is forecast to expand to USD XXX billion by 2031, advancing at a XX% CAGR. Asia-Pacific accounted for XX% of market value, supported by China's large import requirement and the established food-processing industries of India, Japan and South Korea. Food ingredients represented XX% of demand, while hulled seeds gained share as bakery, tahini, snack and ready-meal manufacturers tightened purity and food-safety specifications. Expansion of Brazil-to-China trade, investment in African cleaning and hulling capacity, and demand for traceable, residue-compliant supply will reshape procurement through 2031.

Indicator	Value
Market size 2025	XXX
Forecast 2031	XXX
CAGR	XXX
Largest region	XXX
Fastest region	XXX

Key findings

- The global sesame seeds market generated USD XXX billion in 2025 and will reach USD XXX billion in 2031.
- Global sesame seed production totaled approximately XXX tonnes in 2024, according to FAOSTAT.
- India produced XXX tonnes in 2024, representing approximately XX% of global output and ranking first among producing countries.
- Myanmar produced XXX tonnes and Sudan produced XXX tonnes in 2024.
- China accounted for XX% of global sesame consumption and remained the principal destination shaping international prices and origins.
- China imported approximately XXX tonnes of sesame seeds in 2024, with import value reaching USD XXX billion.
- Asia-Pacific held XX% of global market value in 2025, while Latin America is forecast to grow at an XX% CAGR through 2031.
- Food ingredients accounted for XX% of 2025 market value, ahead of oil crushing at XX%.

Market size and forecast

Market value by year, USD bn

Indicator	2026	2027	2028	2029	2030	2031	CAGR
Market value, USD bn	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Market volume	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Production	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Imports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Exports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Apparent consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Year-over-year value change

Indicator	2027	2028	2029	2030	2031	CAGR
Market value	X%	X%	X%	X%	X%	X%
Production	X%	X%	X%	X%	X%	X%
Imports	X%	X%	X%	X%	X%	X%
Exports	X%	X%	X%	X%	X%	X%

Source: XXX

Global Sesame Seeds Market Trends and Growth Drivers

Sesame occupies a distinctive position between staple oilseed and high-value food ingredient. Production remains dispersed across smallholder systems in Africa and Asia, while value creation concentrates in cleaning, hulling, roasting, oil extraction and branded foods. This structure makes origin quality, working capital and destination-market compliance as important as aggregate crop size.

Demand is becoming more specification-driven. Bakery groups, tahini processors and prepared-food manufacturers increasingly purchase against defined standards for color, purity, moisture, pesticide residues and microbiological condition. Suppliers able to deliver consistent lots across several origins gain share even when their nominal seed price is higher.

The supply map is also changing. Brazil and Pakistan are scaling production, China is widening its origin portfolio, and African governments and processors are investing in domestic value addition. These shifts will moderate reliance on individual origins while intensifying competition for traceable, export-grade seed.

Growth drivers

Tahini, bakery and prepared-food expansion

Sesame use is broadening beyond traditional breads and confectionery into hummus, sauces, snack seasonings, frozen foods and restaurant formats. Industrial buyers favor standardized hulled seed and tahini inputs, raising both processed-seed penetration and realized value per tonne.

China's structural import requirement

China combines substantial domestic consumption with a declining long-term cultivated area and a processing sector that draws on multiple African, Asian and Latin American origins. Its buying cycles establish the global price floor and support investment in export-oriented production.

Clean-label seed ingredient demand

Sesame provides recognizable plant-derived fat, protein, texture and flavor without complex formulation. Premium bakery, plant-based food and nutrition brands are increasing inclusion rates for whole, ground and roasted sesame ingredients.

Processing and food-safety modernization

Optical sorting, controlled dehulling, steam treatment and validated pathogen-reduction systems allow processors to serve higher-value industrial contracts. These capabilities reduce rejection risk and widen the addressable market for exporters in India, Africa and Latin America.

Improved cultivars and mechanization

Non-shattering, uniform-maturity and higher-yielding cultivars reduce field losses and enable combine harvesting. Adoption is particularly consequential in Brazil, Pakistan and commercial African production zones where sesame competes effectively as a short-cycle rotation crop.

Geographic diversification of export supply

Brazil, Pakistan and several West and East African origins are increasing buyer choice beyond established suppliers. A broader origin portfolio reduces concentration risk, extends procurement calendars and supports higher global throughput.

Restraints

Rain-fed production volatility

A large share of sesame is cultivated by smallholders under rain-fed conditions with limited irrigation and variable access to improved seed. Drought, excessive rainfall and poorly synchronized harvests can sharply alter exportable surplus and seed quality.

Food-safety and residue compliance burden

Import controls require exporters to manage pesticide residues, microbiological hazards and documentation at lot level. Testing, segregation and rejected consignments increase the delivered cost of compliant seed and exclude processors without robust quality systems.

Fragmented aggregation and post-harvest losses

Multi-stage collection systems can mix varieties, crop years and quality grades before seeds reach processors. Inadequate drying, storage and cleaning reduce purity and constrain the premium available to growers and origin exporters.

Trade finance and logistics volatility

Sesame traders carry substantial inventory and currency exposure between harvest purchase and destination delivery. Container shortages, Red Sea disruption and elevated financing costs can delay shipments and compress intermediary margins.

Sesame Seeds Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Tahini, bakery and prepared-food expansion	XXX	XXX	XXX
China's structural import requirement	XXX	XXX	XXX
Clean-label seed ingredient demand	XXX	XXX	XXX
Processing and food-safety modernization	XXX	XXX	XXX
Improved cultivars and mechanization	XXX	XXX	XXX
Geographic diversification of export supply	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Rain-fed production volatility	XXX	XXX	XXX
Food-safety and residue compliance burden	XXX	XXX	XXX
Fragmented aggregation and post-harvest losses	XXX	XXX	XXX
Trade finance and logistics volatility	XXX	XXX	XXX

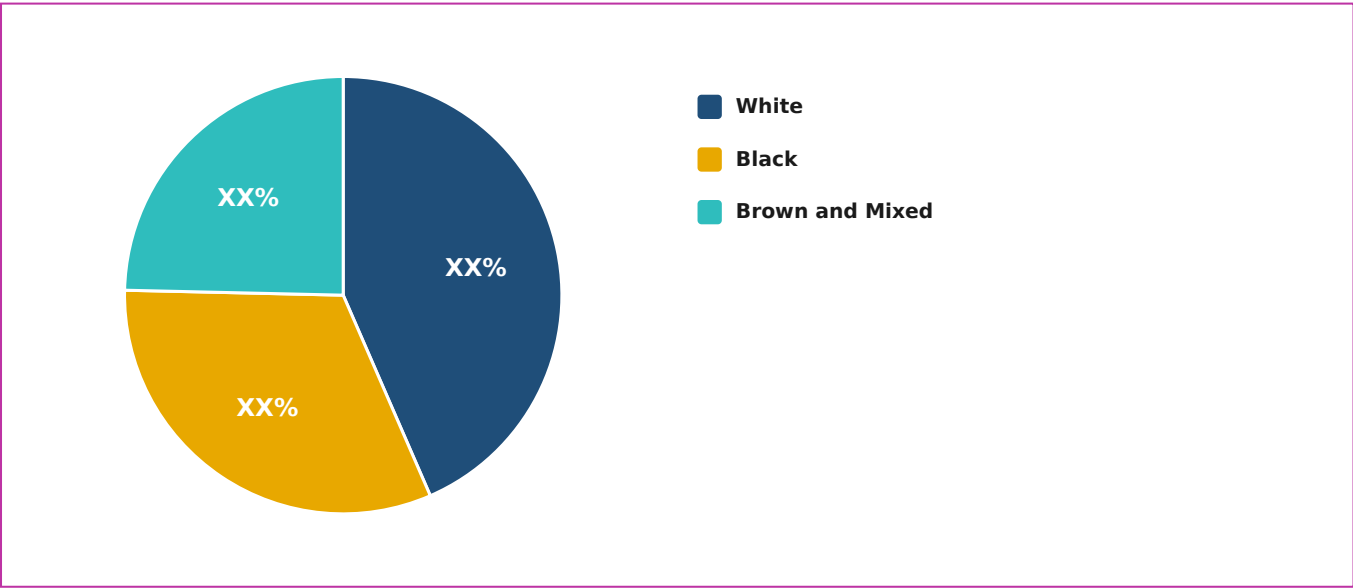
Source: XXX

Sesame Seeds Market Segmentation by Color, Form, Application and Channel

By Seed Color

White seed dominates bakery, confectionery, tahini and premium hulled applications because processors favor its visual uniformity and mild flavor. Brown and mixed seed remains important in oil crushing and price-sensitive markets. Black sesame is gaining fastest through Japanese, Chinese, Korean and wellness-oriented foods, where color and anthocyanin-rich positioning support a premium.

Value share by seed Color, 2025



Source: XXX

Value by seed Color, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
White	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Black	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Brown and Mixed	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Product Form

Natural cleaned seed remains the largest form because it feeds oil mills, destination-market hullers and traditional food channels. Hulled seed earns a higher unit value and is gaining share among industrial bakeries, tahini manufacturers and ready-food producers. Roasted and further processed seed grows from a smaller base as manufacturers purchase flavor-standardized, application-ready ingredients.

Value by product Form, USD bn

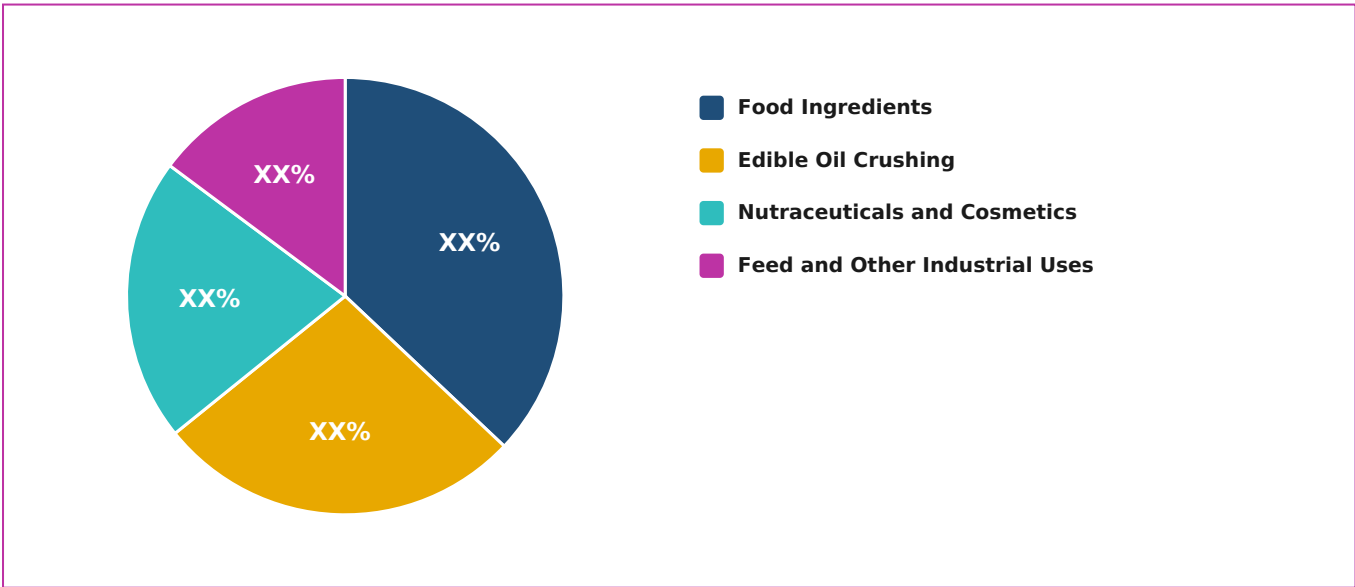
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Natural and Cleaned	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Hulled	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Roasted and Further Processed	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Application

Bakery toppings, tahini, halva, confectionery, seasonings and prepared foods collectively make food ingredients the primary value pool. Oil crushing consumes substantial tonnage but generally uses lower-priced grades and therefore represents a smaller value share. Nutraceutical and cosmetic demand grows fastest as formulators commercialize sesame lignans, protein, natural emollients and premium cold-pressed derivatives.

Value share by application, 2025



Source: XXX

Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Food Ingredients	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Edible Oil Crushing	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Nutraceuticals and Cosmetics	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Feed and Other Industrial Uses	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Distribution Channel

Direct sales to food processors and oil crushers lead because industrial users require consistent grade, volume and shipment scheduling. Traders and export merchants remain essential for aggregating fragmented smallholder output, financing stocks and managing cross-border logistics. Retail and e-commerce command the highest unit prices but represent a limited share of the primary seed market.

Value by distribution Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Direct to Processors	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Traders and Export Merchants	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Retail and E-commerce	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Certification

Conventional supply dominates because sesame production is fragmented and certification, segregation and chain-of-custody systems add significant cost. Organic seed commands premiums in North American and European bakery, tahini and natural-food channels. Growth is strongest where processors combine organic certification with residue control, pathogen reduction and verified origin.

Value by certification, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Conventional	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Certified Organic	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

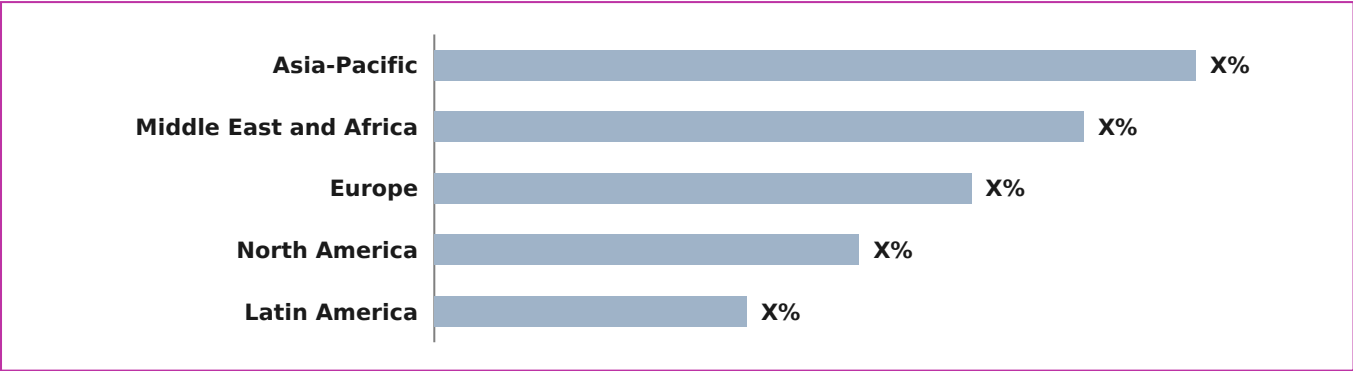
Sesame Seeds Market Regional Analysis and Country Outlook

Asia-Pacific generated XX% of global market value in 2025. China anchors regional demand through crushing, roasted-seed foods, sesame paste and imported raw-seed processing, while India combines a major production base with established hulling and export infrastructure. Japan and South Korea remain high-value destinations characterized by strict specifications, established culinary use and demand for roasted, ground and oil-processing grades.

The Middle East and Africa accounted for XX% of value, joining major production origins with large tahini, halva and bakery markets. Sudan, Nigeria, Ethiopia, Tanzania, Burkina Faso and Uganda are central to export supply, although conflict exposure, inland logistics and uneven cleaning infrastructure affect shipment reliability. Investment in aggregation, storage, optical sorting and local hulling will determine whether regional suppliers capture processing margins or remain bulk-seed exporters.

Latin America is forecast to grow fastest at an XX% CAGR. Brazil's scalable farm structure, suitability for mechanized production and bilateral access to China support rapid expansion, with the number of Brazilian establishments approved to export sesame to China rising from 31 to 61 in July 2025. North America and Europe remain premium compliance markets where bakery, tahini, organic and allergen-controlled supply chains reward consistent specifications.

Growth rate by region, 2025-2031



Source: XXX

Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Latin America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Market value by leading country, USD bn

Country	2025	2031	Share 2025	CAGR
United States	XXX	XXX	XXX	XXX
Germany	XXX	XXX	XXX	XXX
United Kingdom	XXX	XXX	XXX	XXX
Belgium	XXX	XXX	XXX	XXX
Netherlands	XXX	XXX	XXX	XXX
Japan	XXX	XXX	XXX	XXX
China	XXX	XXX	XXX	XXX
Mexico	XXX	XXX	XXX	XXX

Source: XXX

Sesame Seeds Market Competitive Landscape and Company Share

The sesame seeds market remains fragmented, with the ten largest suppliers and processors holding XX% of 2025 value. Olam Agri, Export Trading Group, Dipasa, Tradin Organic and large regional hullers compete through origin networks, quality-control systems, working-capital capacity and access to destination processors rather than through consumer-facing brand power.

Competition is shifting from spot trading toward integrated procurement and processing. Leading suppliers are developing farmer programs, digital traceability, cleaning and hulling assets, accredited laboratories and multi-origin portfolios that allow customers to substitute origins without changing technical specifications. Independent exporters remain influential during harvest periods, but their negotiating position weakens where buyers require validated pathogen-reduction steps and continuous documentation.

Ownership and route-to-market changes are increasing strategic investment capacity. SALIC completed the acquisition of a majority shareholding in Olam Agri in April 2026, strengthening the capital base of a major agricultural merchant, while Brazil's China approvals created a new large-scale procurement corridor. Through 2031, competitive advantage will center on supply assurance, residue compliance, mechanizable varieties and the ability to sell cleaned, hulled or roasted product rather than undifferentiated seed.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Olam Agri	XXX	XXX	XXX	XXX
Export Trading Group	XXX	XXX	XXX	XXX
Dipasa	XXX	XXX	XXX	XXX
Tradin Organic	XXX	XXX	XXX	XXX
Haitoglou Bros	XXX	XXX	XXX	XXX
HL Agro Products	XXX	XXX	XXX	XXX
Virdhara International	XXX	XXX	XXX	XXX
Shyam Industries	XXX	XXX	XXX	XXX
Selet Hulling	XXX	XXX	XXX	XXX
Amsons Group	XXX	XXX	XXX	XXX

Source: XXX

Sesame Seeds Market Forecast, Trade Shifts and Opportunities

Market value will rise from USD XXX billion in 2025 to USD XXX billion in 2031 as food demand, processing penetration and origin diversification outweigh periodic crop and freight disruptions. Volume growth will remain steadier than annual value growth because sesame prices respond quickly to Chinese purchasing, African harvest outcomes and export availability.

The base-case forecast assumes expanding Brazilian and Pakistani supply, gradual recovery and modernization across African origins, and continued industrial demand for tahini, bakery and prepared-food applications. An upside scenario emerges if non-shattering cultivars accelerate mechanization and residue-controlled supply expands faster than expected; the principal downside scenario combines weather-related production losses with stricter border rejections and high trade-finance costs.

Winning suppliers will link agronomy to destination-market specifications. Programs that contract seed color and variety, document farm practices, control moisture and foreign matter, and apply validated cleaning or pathogen reduction will command preferred-supplier status. Margin expansion will be strongest in hulled, roasted, organic and identity-preserved sesame rather than bulk natural seed.

Opportunities

- Certified residue-controlled sesame for European and North American buyers
- Mechanized sesame production in Brazil and other suitable rotation systems
- Origin-based hulling, roasting and tahini production in Africa
- High-oleic, high-lignan and identity-preserved seed programs
- Digital traceability and direct farmer-to-processor procurement
- Premium black sesame ingredients for East Asian foods and wellness products

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