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Day - 1, Tuesday October 26, 2021 - 2:30 pm - 5:30 pm India Time (GMT+ 5:30 hr)	
2:30 pm - 2:35 pm India Time	Inaugural session Mr Srivatsava Ganapathy , Sesameinfo.in
2:35 pm - 2:45 pm India Time	Special address: IOPEPC initiatives in sesame sector Mr Nilesh Vira , IOPEPC
2:45 pm - 3:00 pm India Time	Keynote address - Global Sesame Crop Scenario for 2021 Mr Sanjeev Sharma , Olam International
3:00 pm - 5:00 pm India Time	Discussion: Country-wise 2021 Sesame Crop Review and Outlook Moderator: Mr Sandeep Bhura , Om India Trading Co Pvt Ltd Panellists: Mr Tarun Chawla , ETG - Tanzania, Mozambique and Uganda Ms Camila Regina Lander , Correpas Farm Products - Brazil Mr Gilberto Ozorio , CAPEXSE - Paraguay Mr Sisay Asmare , EPOSPEA - Ethiopia Mr Mamoun Ibrahim Gaily , Gaily Trading DMCC - Sudan Mr Sebastian Andrew , Vink Corporation DMCC - Nigeria Mr Alok Bhargava CA , Praramb Agri Trading DMCC - West Africa (except Nigeria) Mr Danny Chen , Flavor Full Foods Inc Mr Monik Vorra , Anand Agro Commodities - India Mr Mahesh Raja Manglani , Mast Qalandar - Pakistan
5:00 pm - 5:10 pm India Time	Presentation - Logistics and shipping and trade challenges and the way forward in Nigeria Mr Abubakr Abiola , Starlink Global & Ideal Limited
5:15 pm - 5:25 pm India Time	Presentation - Sesame quality control at community level experience of the USDA Mr Boubacar Sow , Sesame Marketing and Export project - USDA
5:25 pm - 5:40 pm India Time	Open House

Day - 2, Wednesday October 27, 2021 - 2:30 pm - 5:30 pm India Time (GMT+ 5:30 hr)	
2:30 pm - 2:45 pm India Time	Special address-1: Paradigm shift in eating habits with focus on sesame see Mr Rutuparna Dole , Bora Foods Pvt Ltd
2:45 pm - 3:00 pm India Time	Special address-2 - India sesame oil market: Opportunities for growth Mr VR Muthu , VVV & Sons Edible Oils Limited
3:00 pm - 5:00 pm India Time	Discussion: Global Sesame Markets: Trends and outlook Moderator: Mr Mukul Gupta , Shakumbhri Expo Impo Limited Panellists: Mr Tomohisa Fujimoto , Mitsui & Co Ltd - Japan Mr David Buttery , Global Grains & Ingredients Ltd - European Union Mr Mihir Parmar , Mamta Commodities - India as a destination for sesame Mr Alper Onel , Orgin Agro Trade Ltd - Turkey Mr K S Prakash , Hakan Foods DMCC - Middle East & Turkey Market Trends Mr Yasser Mohamed Abou Gelail , Safe Herbs & Spices Co - Egypt Ms Jane Zeng , ETG Group China
5:00 pm - 5:15 pm India Time	Presentation - Recent developments in Sesame hulling technology Mr Ali Tugbay Tavukcu , Akyurek Technology
5:15 pm - 5:30 pm India Time	Conference summary

Welcome address

Mr Srivatsava Ganapathy

Sesameinfo.in

Ladies and Gentlemen, Good morning to all those who have joined from Europe and Americas, Good afternoon to all those joined from Middle East & India and good evening to delegates from South East Asia, China and Far East! My name is Vatsa. I am from sesameinfo.in. On behalf of sesameinfo.in, I extend a warm welcome to all of you to the Virtual World Sesame Conference. Hope all of you and your family are safe and in good health.

Before we start, I would like to place our prayers to all those unfortunate ones that are not amidst us due to pandemic. I also place on record our sincere appreciation to tremendous initiatives undertaken by some of the members of the sesame industry in fighting the pandemic by working closely with local governments and civil societies. Together we shall overcome this challenge. With this thought, I seek your permission to commence the conference.

We have over 750 registered delegates from over 35 countries and 500+ companies / organisations amongst us. We have 23 sponsors / exhibitors, and 7 supporting bodies or partners / association that have helped us to put this conference together. We have about three hours of conference sessions each for today and tomorrow and over 7 hours for networking for both today and tomorrow for your convenience. Some of the special highlights of the WSC2021 are four special addresses, two each scheduled for today and tomorrow, simultaneous translation in French for those guests from Francophone countries and more interactive features on Hubilo platform for better networking. Hope all these would help in better interactions, better networking and sharper insights on the markets.



We take a moment to place our sincere appreciation to all our sponsors / partners and supporting bodies. Please allow me to quickly announce the names of the sponsors of the Virtual WSC2021.

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Media partner- Turkish Trade, and Globalaginfo.com
We thank all the sponsors, partners and supporting body for their support.

Here are some of the ways in which you can derive maximum from the conference. Use all the features of the platform. You can chat with any delegate / speaker, you can have a secured one-to-one video call with any other participant, visit stall / exhibition booth and interact with the company representatives, see their videos, download their leaflets etc. The networking session would remain open for two hours after the close of the conference session. It would open two hours prior to commencement of conference session tomorrow. So, you can use these opportunities to extensively network with industry colleagues based on mutual preferences.

Inside the conference session, you can post your questions over chat to the speaker, and also post your views / comments on subject pertaining to the discussions. Within the constraints of time, we would try and address the questions.

Once again, I welcome you all to the Virtual WSC2021. Wishing you all a rich and engaging session of learning, sharing and growing business together. Best wishes

Special address



IOPEPC initiatives in the sesame seeds sector, Mr Nilesh Vira, Chairman, Indian Oilseeds and Produce Export Promotion Council

Focused promotion of sesame seed export

IOPEPC arranges to participate in international trade shows, exhibitions, conferences, buyer-seller meetings, and India visits. Delegation to other countries as a member of an official government delegation for meetings. Creating awareness for quality improvement among Farmers in India through workshops advocating Good Agricultural Practices (GAP) training sessions for the Seed-processing unit. Regional meetings to boost the supply chain for India's sesame seed exports. They are using independent professional agencies to conduct crop surveys to analyze the production and quality of sesame seeds. Annual trade shows are held, and export awards are given to encourage Indian exporters. The Council serves as an Institutional Arbitrator, allowing seed exporters to enter into contracts with the assurance of swift and low-cost justice.

Sesame seed exports to EU

The IOPEPC has been designated as the nodal agency for sesame seed exports to the European Union. As a result, each container of sesame seed to be sent to

the EU is issued an official certificate by the Council. Salmonella, pesticides, and now EtO are all examined on seed shipments.

Procedure for sesame seed exports to EU

Council has an online system (Sesamum.net) to implement export procedure sesame seed exports to the EU. Registered exporters were given access to consignment. Qualified technical persons in laboratories test the samples, and the test results are uploaded in sesamum.net

Effective handling of EtO issue in EU

EU regulation 396/2005 governs ethylene oxide (EtO). IOPEPC has halted the creation of sesame seed consignments intended for export to the EU on their online portal Sesamum.net to comprehend the EtO residue better. Between mid-October 2020 and mid-January 2021, exports halted temporarily. Natural occurrence and cross-contamination are two probable explanations for the EtO issue. The chance of the former being very high, especially in circumstances when the exceedance level from the EU MRL is not substantial. India has requested that the EC review and reconsider its position on the MRL established for EtO residue in sesame seed, based on data that EtO can occur naturally or through cross-pollination. India has taken the EU's concerns about food safety seriously and is taking the required steps to avoid the presence of EtO in food products exported to the EU.

Q&A:

Do you have a standard contract in place for African imports?

Our council does not regulate contracts for cargos that arrive in India from Africa. For imported cargos, as we say, the buyer and seller design and define the contract requirements and conduct business accordingly.

Does the council have an arbitration facility?

Yes, one can use an arbitration facility as long as one is a member of the council.



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Keynote address

Global Sesame Crop Scenario for 2021, **Mr Sanjeev Sharma**, Senior Vice President & BU Head- Sesame & Super Foods, Olam International.



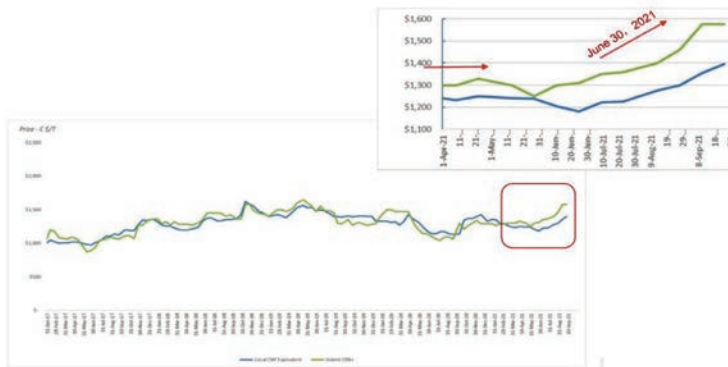
Africa Main Origin Trade -in 1000 mt					
Origin/Year	2017-2018	2018-2019	2019-2020	2020-2021	Est.2021-2022
Ethiopia	285	260	250	220	140
Sudan	322	310	300	230	195
Nigeria /Niger /Chad	270	310	320	330	260
Mali/Togo/Burkina	154	180	190	210	210
Uganda	25	25	25	25	25
Tanzania	95	130	170	150	150
Mozambique	67	100	120	90	90
Total	1,218	1,315	1,375	1,255	1,070

This year in Africa, sesame trade is below par compared to recent years; Overall, African production has decreased by about 185,000 metric tons compared to the previous year.

Rest of the world

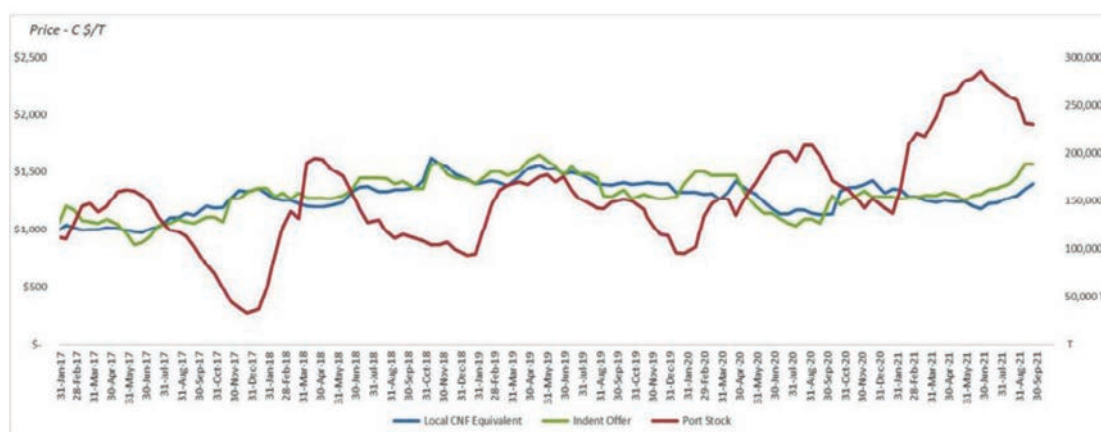
Brazil's high sea freights are causing a problem; a crop shortage in India and China's crop damage led to historic high imports during 2021. Overall, supply from large producing countries is decreasing.

PRICE TREND



From the chart, prices have surged up from about USD 1200 to about 1600, especially the prices spurt up since June 2021. Price-affecting events include a fall in China's domestic crop, crop delays and reductions in Tanzania and Mozambique, and closing the China-Myanmar border.

China port stock



There has been no correlation between Chinese port stock and prices in the recent four to five years. In China, a port stock of 210,000 metric tons or more is considered normal. Qingdao has become the world's most giant sesame warehouse and a super cleaning and Sortex concentrate Centre.

New-season forward

Five of the six major potential growing areas are experiencing issues, while one is stable.

China: Overall crop cut by 30 percent or more compared to the previous season. ⬇️

India: Crop yields are lower this year than last year due to rain. ⬇️

Nigeria: Crop reduced around 20 percent ⬇️

Sudan: Crop reduced around 15 percent ⬇️

Ethiopia: Crop reduced around 30 percent ⬇️

Mali + Togo + Burkina: Similar as of last season ↔️

Bullish

China is a price driver, and their consumption has not decreased. Japan will have to buy more during the 2021/2022 season. Africa's supply chain is slow, and right now (second half of October), we are witnessing many problems in Sudan and Nigeria. India imports more from Africa due to a shortage of its domestic crop.

Bearish

Higher stocks in China around 210,000 metric tons. Pakistan has been gaining its market share. After the ETO tragedy, the market for processed sesame is declining, while other products are surging ahead.

Overall, we believe that supply remains tight, except that supply disruptions may cause market volatility, with some up and down swings possible.

Q&A:

Some currencies are highly volatile. How does it affect the markets?

Each currency must be evaluated for its advantages and disadvantages. When it comes to procurement, the market moves quickly, especially when it comes to currency appreciation or depreciation in the country of origin. The market will only cover up in 7 – 10 days at best, and it may be even less. The market adjusts, the only currency that has a structural impact on the hulled market is the Indian currency because India is the lowest cost producer of hulled seed. When the Indian currency strengthens or weakens, it influences the hulled market, taking time for everyone else.

Everyone is a price taker, but in this case, India is a price maker since its currency has a greater impact on flow and commerce than any other currencies. Others are more spot traded and may be addressed immediately.

Panel 1: Country-wise 2021 Sesame Crop Review and Outlook



The session was moderated by **Mr Sandeep Bhura**, Om Trading Co. Pvt. Ltd.



Global Overview of Sesame Market, **Mr Tarun Chawla**, Chief Operating Officer, - Africa Pulses, Sesame & Peanuts, Export Trading Group-ETG

Global Trade in - "000" MT					
Origins\Year	2017-18	2018-19	2019-20	2020-21	Est 2021-22
India	367	230	250	220	200
Ethiopia	285	220	260	180	150
Sudan	385	330	380	270	250
Nigeria	265	280	305	350	290
West Africa/Burkina	120	195	185	220	180
Uganda	20	25	20	20	20
Tanzania	90	75	127	120	120
Mozambique	65	65	92	75	70
China	32	35	35	30	30
Total Global Trade	1,629	1,455	1,654	1,485	1,310

Marketing year: Oct to Sep.

Global trade is likely to shrink 1.3-1.35 Million tons in 2021/22 as against 1.485 Million tons 2020/21.

MY 20-21: Southern hemisphere supply reduced when compared to last year.

India's import and re-export viability is under pressure owing to higher freight costs.

Uganda has developed organic sesame still not sizable but it is a significant premium to Chinese markets for crushing.

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Northern Hemisphere Estimate: 2021-22

(Change in Supply Numbers Expressed in Metric Tons)

Country	Supply
India	20,000 ↓
Sudan	30,000 ↓
China	50,000 ↓
Ethiopia	50,000 ↓
Nigeria	60,000 ↓
Burkina Faso cluster	40,000 ↓

Overall Northern hemisphere crop (major origins) was reduced by 250,000 metric tons. Sesame lost its acreage in West Africa and China due to higher returns from other competing crops. India's crop is expected to be less than last year mainly due to unseasonal rains.

Rest of the World

Country	Est Demand
Japan	2,10,000
Middle East	1,30,000
Turkey	1,45,000
Israel	60,000
EU	90,000
Vietnam	40,000
S. E Asia	45,000
Korea	75,000
Others	70,000
ROW Total	8,65,000

Japan imports in the region of 150,000 and 200,000 metric tons. Turkey imports 50% from Nigeria and the rest from Sudan and other countries and then re-exports it. In Korea, the state tender contribution will likely be 36,000 to 40,000 metric tons /Year, and the remaining is under a private quota. Since 2016, 24,000 metric tons have been under China's FTA.

The total demand for processed and natural sesame for the rest of the world can shrink due to higher prices and a short supply of 850,000 metric tons.

China's demand

China's Imports (quantity in Metric Tons)

Origin	2016	2017	2018	2019	2020	2021 Est
Ethiopia	300,965	209,528	160,945	112,470	146,102	125,000
Sudan	114,551	181,633	254,935	171,131	231,132	190,000
Togo	97,908	44,781	101,227	109,129	112,178	175,000
Mali	87,562	25,688	17,723	39,736	52,299	40,000
Tanzania	107,895	69,135	57,749	108,861	139,873	105,000
Uganda	12,179	7,061	13,558	9,188	15,079	18,000
Somalia	6,525	720	1,206	2,446	735	4,000
Niger	130,211	104,652	141,814	155,567	177,642	290,000
Burma	6,155	8,219	7,524	7,997	455	2,000
Bangladesh	7,893	7,232	2,479	5,442	6,467	2,000
Senegal	7,317	2,611	2,445	2,201	1,511	3,500
Mozambique	34,536	35,093	52,617	78,675	103,050	60,000
Pakistan	1,203	3,337	3,024	2,734	9,341	45,000
India	5,999	6,815	6,608	979	7,013	6,000
Nigeria	1,418	1,256	2,204	3,499	3,741	2,500
Burkina Faso	187	-	57	57	1,700	400
Others	10,635	5,163	1,764	2,275	7,751	5,500
Total China Imports	933,139	712,925	827,878	812,387	1,016,067	1,073,900

- China's imports in the current year are likely to be historic high of 1.05 M metric tons.
- Niger/Nigeria exports to China will be historic high this year.
- Despite this, China port stocks can drop to 100,000 to 120,000 by the end of Dec'21.

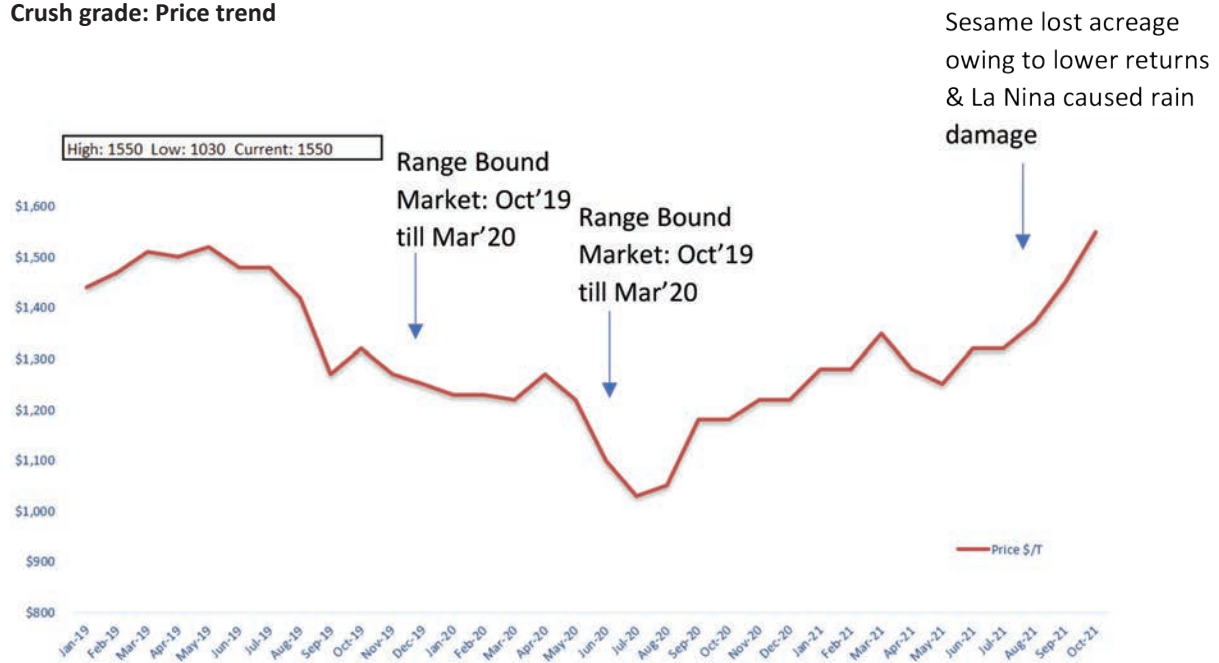


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Crush grade: Price trend

The FIVE C's causing price volatility are China, Climate, Crop returns, Currency, and Covid.

Forward outlook: Our view**Bullish cues:**

- La Nina conditions for the second year in a row
- Crop shortages have been confirmed in China, India, Ethiopia, Nigeria, and Burkina Faso
- Higher logistics cost and port disruptions

Bearish cues:

- Covid: Belt-tightening owing to loss of income
- Demand substitution
- Sesame market outlook is looking bullish, the same has reflected in the price surge, and only demand substitution can put some cap on the prices, else we can witness USD 1600 and 1800 per ton price range this season.



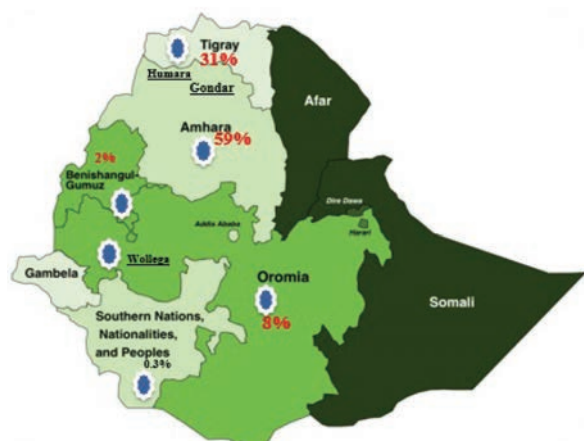


Ethiopian Sesame market trend and outlook, **Mr Sisay Asmare**, President of Ethiopian Pulses Oilseeds and Spices Processors Exporters Association (EPOSPEA)

Ethiopia Sesame seed export trend



Ethiopia sesame growing regions



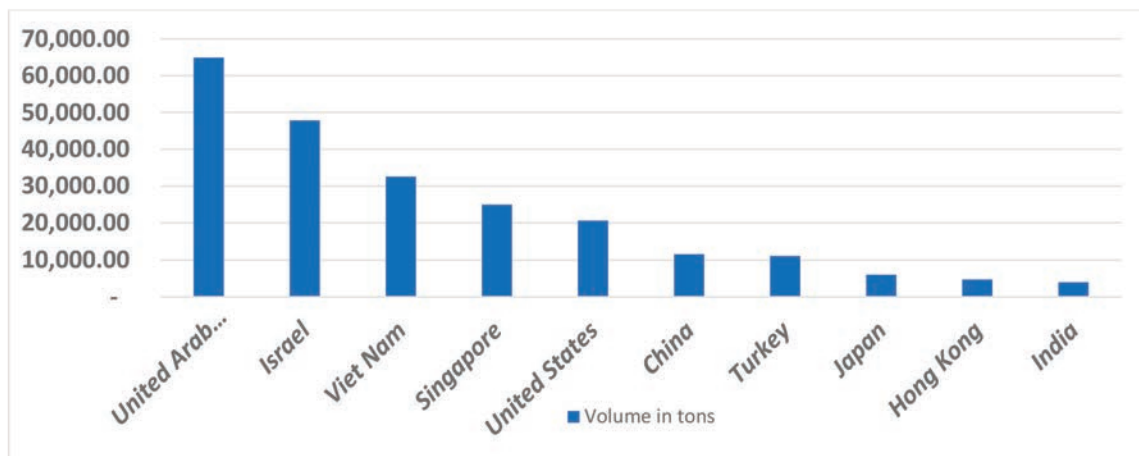
Because of price declines in the international market and some sesame-growing regions switching to other crops like soybean, cotton, etc., As a result, that export and production volume declines and hence, there is a reduction of 2,10,679 tons in export volumes, or 46.3 percent, from 2015-16 to 2020-21.

Ethiopian Sesame seed production trend



Internal displacement and instability in this changing environment have resulted in a 75,270 tons drop in output from 2015 to 2021.

Top Ethiopian Sesame destination - 2020/21



Ethiopian sesame inventory

ECX traded 155,000 metric tonnes from November 2020 to September 2021. Carryover from the previous year was 30,000 tonnes

New crop export performance (November 2020-September 2021) = 181,866 metric tonnes.

Exporters' inventory is anticipated to be 3,134 metric tons as of September 30. Suppliers' inventory on hand until September 30 is projected to be 5,000 metric tonnes. Total stockpile - 8,134 metric tons

A glance at the 2021 sesame scenario

- Due to the instability in a few sesame growing areas, there is a slight decline in sesame area coverage. The total estimated area coverage is 550,000 hectares. Last year it was 600,000 hectares, a decrease of 50,000 hectares.
- Fortunately, in most emerging sesame growing areas of the country like Oromia, Somali and southern region, sesame area coverage is improving.
- The weather condition in almost all of the sesame growing areas is very conducive. As a result, productivity improves.
- No weather catastrophe affecting the sesame growing areas was observed this year.
- No sign of pests and infestation or hazardous conditions is observed in most sesame growing areas.

- Rainfall is suitable in most of the sesame growing areas.
- Therefore, the decline in area coverage is expected to be traded off by improved productivity.

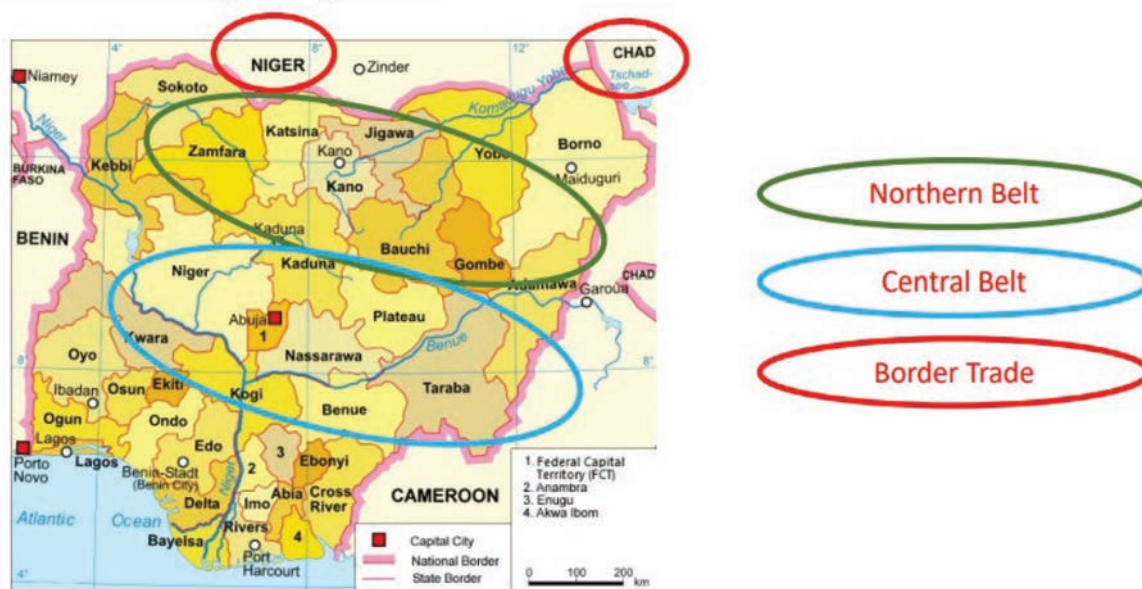
Expectation and recommendation

- Globally, oil-crushing factories are opened in most countries, restaurants are opened, school feeding is started, and health awareness of sesame is globally increased. Therefore, the demand is high, supply is expected to be below, and an upward price is expected.
- The markups of trading houses supply chain managing companies' sesame value-added product producers and retailers are very high compared to those paid to sesame farmers. This is discouraging farmers from producing sesame, and many are switching to other products.
- Gradually, the supply of sesame seed to the global market will decline significantly unless all industry stakeholders work together to improve both price payment of the farmers and sesame productivity at the farmers' level.



Nigerian Sesame Crop Review and Outlook, **Mr Sebastian Andrew**, Business Manager VINK CORPORATION DMCC, a member of TGI Group

Producing Regions



New crop estimates

Cultivation area in Hectares : 1,061,200 and crop estimate for the season 290,000 tons.

Factors	Effect
Price of other crops	Due to high realization for Soyabean, Sorghum, Millet and Maize, farmers had made switching from sesame seed farming in some areas. This reduced Sowing area for sesame seeds.
Weather	Late rainfall in some parts of Northern Nigeria. Delayed sowing in North and North Eastern states.
Pest & Disease	No Major Impact reported
Quality	Overall quality is good and similar to last season.



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This year's crop is expected to reduce by 15-20%, resulting in a drop in quantity exported out of Nigeria.

Season	Export in tons
2017-18	260,000
2018-19	295,000
2019-20	350,000
2020-21	355,000
2021-22	290,000 and above

Due to a large crop and the availability of cargo throughout the year, the scope of the business has expanded for over a decade and is now diversifying into value-added items. Nigeria has been exporting hulled cargo in the last two to three years.

The shipment of sesame seeds is expanding, as seen by regular Korean tender participants. Sesame oil is attracting investment in Nigeria. WACOT is a group corporation that handles Nigerian exports. WACOT is the first company to offer certified organic sesame.

Currency depreciation, shortage of empty containers, shipping lines reluctance to supply forward rates with

validity, increase in logistics cost, and port congestion in Lagos and followed PHC are some of the challenges exporters face during this season.

Nigerian prices have been going up for the past two months. With an overall supply shortage and slight variation in demand, prices are anticipated to remain stable, with some bullishness expected in the medium to long term.

Q&A:

When do you believe cargo will be able to board if we order today (October 26)?

Cargo can be on board the ship by November or December if the order is placed by the end of October. Because the produce will not be in hand at the start of the season and exporters will realistically sell for November and December shipments. More shipments are expected in late November and early December with more export volumes in December than in November.





Sudan sesame seeds, review of the season 2020/21, Mr Mamoun Ibrahim Gaily, Chairman, Gaily for Export Promotion-Sudan

This year, the Sudanese sesame export has been impacted by many factors, which include political and economic shifts, fuel shortages, currency fluctuations, and floating and local price variations.

Status of Port Sudan

Port Sudan's port is witnessing a severe decline in containers traffic due to several reasons: the global containers shortage crisis, the Covid-19 pandemic, and

the main issue of container handling problems at Port Sudan.

The below table shows the decline in the number of containers handled at Port Sudan port even before the Corona Virus Pandemic in 2019.

Year	Number of Handled Containers		
	Import	Export	Total
2017	252,383	234,953	487,336
2018	229,908	221,804	451,712

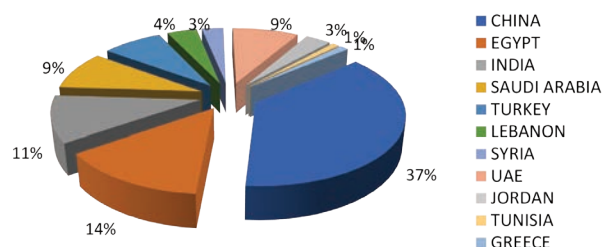
Source: Seaport Corporation Status – World Bank

Total Sesame Exports 2019-2021

Period	2019 (MT)	2020 (MT)	2021 (MT)
Jan	71,469	85,637	36,212
Feb	62,957	83,445	40,101
Mar	62,276	71,420	54,782
April	49,415	77,048	43,592
May	49,891	44,690	38,341
June	25,201	42,592	21,851
Total	321,209	404,832	234,889

Source: Sudan Customs

Sudanese sesame Importers Jan-Sep 2020 (%)



Sesame Import By Major Countries – Jan-Sep 2020 Importing Countries Growth Rate Compared To Previous Season's

Country	Export Value		Growth (%)
	Jan-Sep 2020 \$ (000)	Jan-Sep 2019 \$ (000)	
China	221,910	139,044	59.59
Egypt	82,674	84,142	↑ 1.75
India	63,489	51,355	↓ 23.63
Saudi Arabia	53,651	48,511	↑ 10.60
Turkey	46,346	37,272	↑ 24.35
Lebanon	23,034	18,633	↑ 23.62
Syria	16,738	22,474	↑ 25.52
UAE	51,570	20,241	↓ 154.78
Jordan	19,873	20,097	↑ 1.15
Tunisia	5,813	7,099	↓ 18.12
Greece	7,130	8,933	↓ 20.18
Total	592,228	457,801	↓

Source: Central Bank of Sudan – Sudan Customs

Areas under sesame cultivation 2021/2022

State	Crop (Fadan)
Gedaref	7,50,000
White Nile	20,50,000
Kurdofan	33,75,900
Darfur	14,90,600
Sinnar	11,22,000
Blue Nile	5,28,000
Others	85,000
Total	94,01,500

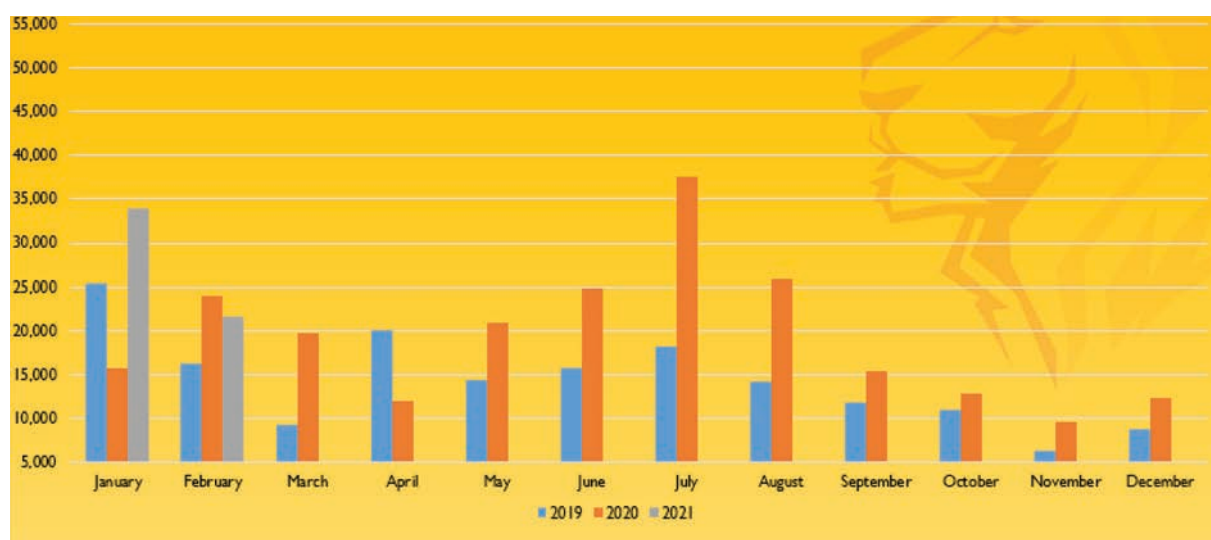
Sesame inflow in Gedaref Market (MT)

Month	2019	2020	2021
January	13,834	17,189	4,501
February	11,944	12,968	6,701
March	7,842	9,998	3,346
April	4,267	7,016	1,276
May	2,130	1,741	1,342
June	2,074	4,729	1,134
July	3,087	2,783	434
August	2,003	2,163	413
Total	47,181	58,587	19,147

Source: Gedaref crop market

Sudan estimates a drop of 39,440 tons in market inflow into the Gedaref market from January to August 2021, compared to January to August 2020 (YoY basis).

Sudanese Sesame imports into China (tons)



Source: China Chamber of Commerce

2021/2022 season expectation

Cultivated areas (all types): 9,635,390 Feddan

Total production expected: 750,000 tons

Local Indus. Consumption: 220,000 tons

Crop carry forward: 70,000 tons



Analysis of China Sesame Production & Market Situation, Mr Danny Chen, CEO, Flavor Full Foods Inc.

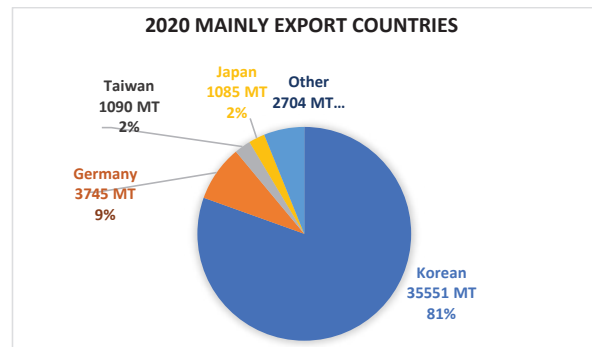
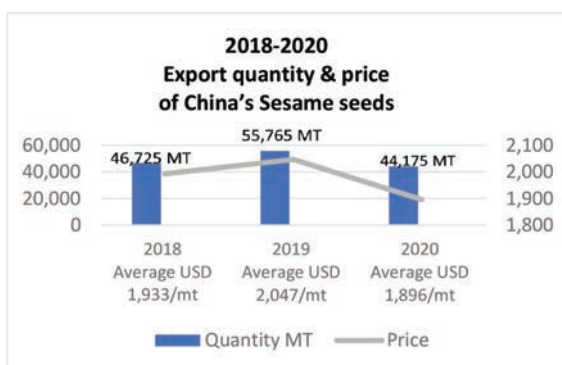
Review of 2020

The stages of sesame price increase in China's domestic market since 2020.

From September to October 2020:

China sesame production was reduced more than expected, and the price of imported sesame seeds in Qingdao port and Tianjin port remained at In the past three years, a low level stimulated the demand for stockpiling goods and the demand for substitution of imported sesame against China sesame seeds.

Export position



Due to the China-Korea Free Trade Agreement, Korea is the top exporting destination, accounting for roughly 81 % of total exports. Other exporting destinations include Germany (9%), Taiwan (2%), and Japan (2%).

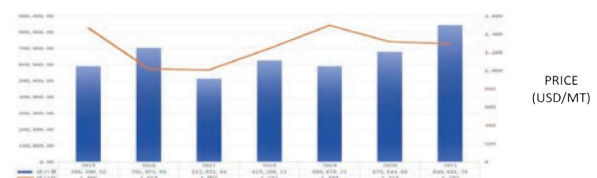
Growth conditions

In China, the planting area of sesame decreased sharply from 400,000 hectares last year to around 120,000 hectares in 2021, reduced by about 70%. It is estimated that China's sesame production in 2021 will be approximately 125,000-150,000 tons, a sharp decrease of around 30-35% over last year. 2020 carry-over stock is about 50,000 tons.

The planting area of corn and peanut in the main sesame producing regions was increased significantly this year, as the farmers lack the motivation to plant the sesame. This is the main factor for the sharp decline in the white sesame planting area this year.

Import position

Import quantity & price of China's Sesame seeds (2015-2021(JAN-AUG))



Factors affecting sesame seeds 2021

Internal factors:

- Higher inflation, higher crude oil price, and uncertain exchange rate.
- Unpredictable shipping time and lack of shipping space and container

- Covid-19 is spreading worldwide, it's still a challenge to the markets
- China power rationing and industrial production and operation cuts
- 210,000 MT stock of sesame seeds in Qingdao now

External factors:

- The border of Vietnam and Myanmar were closed due to the epidemic, the imports of QTY were increasing in Qingdao Port.
- Proactive purchasing for Pakistan sesame seed, due to DFT between Pakistan and China, which covered the demand for the Chinese New Year.
- The shipment is delayed from Mozambique than expected before, and the shipment from Sudan port is unpredictable, how many quantities arrived in the second half-year will be the key factor for the market.

Q&A:

China's planting area has been reduced by 70%, yet production has only been lowered by 30%. Why?

According to data available average output per hectare, this year is higher than the previous year which has compensated to a certain extent the shortfall in planted area. Rains last season has impacted the crop.

How is the export quality of China's white sesame this year?

China has been exporting high-quality white sesame seeds to overseas countries, and the quality is good this year, despite unfavourable weather.





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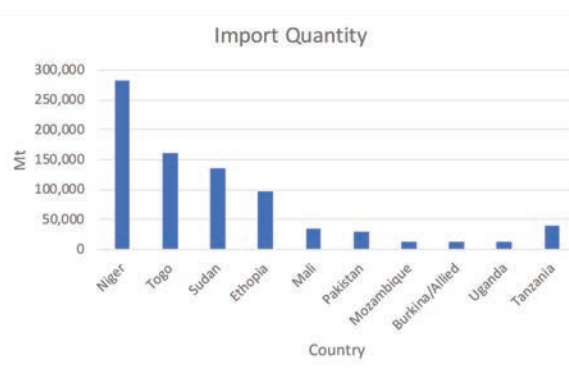


Burkina Faso and Allied Sesame Crop Outlook 2021, Mr Alok Bhargava C A, Director, Praramb Agri Trading Dmcc Dubai.

Burkina Faso and its allies (Mali, Togo, and Senegal) are expected to produce around 210,000 metric tonnes in 2021/2022. Cropping will begin in November, with both white and mixed types. Although Burkina is under Duty-Free Trade, it is still not active.

China Imports – Jan to Aug 2021

Country	Quantity (Mt)
Niger	282,348
Togo	161,071
Sudan	135,973
Ethiopia	96,928
Mali	35,226
Pakistan	28,870
Mozambique	12,391
Burkina/Allied	12,381
Uganda	12,160
Tanzania	40,371



As shown in the above table, after Niger/Nigeria, Togo and Sudan remain the highest imports to China. Hence, Burkina Faso plays a significant role as far as China and Japan are concerned.

Trends and Demand

Japan: During this year, prices so far vary from US 1250 to 1570 USD. Nigeria is currently dealing with a logistics issue; import volumes are estimated to total 180,000 for the year.

China: China's import volume usually averages well above 800,000 tons, in 2021, it is expected to cross more than 1.1 million. Port stock is 210,000 tons, down from a high of over 300,000 tons. Niger/Burkina is replacing Ethiopia as a major supplier. Currency depreciation will play a major role.

Turkey/Middle East: The level of imports from Turkey and the Middle East has remained stable. Large scale purchases are not happening due to the impact of lockdown on small seed demand.

The future direction of the market

The future depends on buying from China; logistical concerns remain a big concern that could add fuel to the market, currency fluctuations, and reduced purchasing power in general. However, imports have remained relatively unchanged. After Corona, the origins are firm and adamant.

Q&A:

Do you expect a lot of white sesame in this region? Do you observe new factories making any edible grade that is sortex quality and hulling?

Yes, an increasing number of people are opting for the sortex machine, especially to target Korean tenders and gain access to Chinese markets. However, in Burkina, the concept of hulling sesame using sortex machine is yet to catch momentum.



Indian sesame seeds crop scenario 2021(Kharif season), Mr Monik Vorra, Anand Agro Commodities – India.

To complete this survey, we traveled approximately 4,000 kilometers in 10 days, covering four states.

Rajasthan

CONTENT	RAJASTHAN
Sowing	July 1st - Aug 15th
Less Rainfall	July 1st - Aug 15th
Moderate To Heavy	July 22nd -Aug 4th
No Rains	Aug 10th –Sept 8th
Heavy	Sept 9th -29th
Harvesting	Sept 22nd -Oct 15th

Brown / black sesame is typically intercropped with moong in western Rajasthan, although white sesame is good in eastern and western Rajasthan. Eastern Rajasthan is where winter sowing takes place.



Overall, sowing is going well, but untimely rains and dry spells are causing yield losses.



We can see that the height of the plants is highly different in both heaps that premature showers have marred. Farmers wanted to produce their winter crop, rapeseed. Therefore harvesting was done much earlier, fearing more rains.

GOI Area in Hectares #	Damaged Area in %	Actual Area after considering Damage in Hectares	Avg Yield of Last 5 Years Per Hectare in KGS	Yield Loss expected for 2021	Actual Yield for 2021 Per Hectare in KGS	Estimated Production for 2021 in Metric Tons
2,84,800	25%	2,13,600	400 Kgs	100 Kgs	300 Kgs	64,080 MT

Sources: Department of Agricultural & Farmers Welfare (www.agricoop.nic.in)

Uttar Pradesh

CONTENT	Uttar Pradesh
Sowing	Jun 30 th - July 15th
Less Rainfall	Jun 30th - July 15th
Heavy Rainfall	July 18th -Aug 4th
No Rains	Aug 10th –Sept 8th
Heavy Rainfall	Sept 16th -29th
Harvesting	Sept 25th -Oct 15th





Heavy rains, in the beginning, have caused seed germination to be delayed and grass to emerge from fields. Farmers do not care for their crops after severe rains; generally, re-sowing will happen if germination is damaged; however, this is not done in this case. Farmers postponed seeding rapeseed until next season due to higher (record) rapeseed prices. According to the survey, 70% of the farmers would be shifting to other cash crops next year, resulting in lower production.



GOI Area in Hectares#	Damaged Area in %	Actual Area after considering Damage in Hectares	Avg.Yield of Last 5 Years Per Hectare in KGS	Yield Loss expected for 2021	Actual Yield for 2021 Per Hectare in KGS	Estimated Production for 2021 in Metric Tons
4,00,500	50%	2,00,250	250 Kgs	80 Kgs	170 Kgs	34,042 MT

Sources: Department of Agricultural & Farmers Welfare (www.agricoop.nic.in)

Madhya Pradesh

CONTENT	Madhya Pradesh
Sowing	Jun 20th - July 15th
Less Rainfall	Jun 20th - July 15th
Heavy Rainfall	July 22nd -Aug 4th
No Rains	Aug 10th -Sept 8th
Heavy Rainfall	Sept 10th -29th
Harvesting	Sept 25th -Oct 15th

Madhya Pradesh is experiencing high and low rains in the early and late stages of the season, which has harmed sesame seed output this year. Because the farmer was eager to cultivate rapeseed for the following season, resowing was not done. Untimely and heavy rains have had an impact on crops and production. Farmers are neglecting their crops and fields. Even in Madhya Pradesh, there was a conversion to groundnut crop owing to better price realization. The yield will be lower the following year.





GOI Area in Hectares #	Damaged Area in %	Actual Area after considering Damage in Hectares	Avg Yield of Last 5 Years Per Hectare in KGS	Yield Loss expected for 2021	Actual Yield for 2021 Per Hectare In KGS	Estimated Production for 2021 in Metric Tons
3,23,000	50%	1,61,500	250 Kgs	80 Kgs	170 Kgs	27,455

Sources: Department of Agricultural & Farmers Welfare (www.agricoop.nic.in)

Gujarat

CONTENT	Gujarat
Sowing	July 1st - July 5th
Good Rainfall	Jun 15th – June 23rd
Moderate Rainfall	July 8th - July 14th
No Rains	July 15th – Aug 30th
Heavy Rainfall	Sept 2nd - Sept 29th
Harvesting	Sept 10th -Oct 16th

Gujarat's story is distinct from the other three states. Sowing began early, with a few good rainfalls in the early stages. Farmers entirely diverted to groundnut because Gujarat is India's largest groundnut producer. Therefore sowing was lower than last year.



Long dry spells lasted over 1 -1 ½ months. Crop condition was good until August, when heavy rains in September disrupted everything, causing standing crop damage and significant yield and production losses.





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GOI Area in Hectares#	Damaged Area in %	Actual Area after considering Damage in Hectares	Avg Yield of Last 5 Years Per Hectare in KGS	Yield Loss expected for 2021	Actual Yield for 2021 Per Hectare in KGS	Estimated Production for 2021 in Metric Tons
1,00,100	30%	70,070	500 Kgs	250 Kgs	250 Kgs	17,517

Sources: Department of Agricultural & Farmers Welfare (www.agricoop.nic.in)

All India Kharif sesame crop production

States	GOI Area in Hectares #	Damaged Area in %	Actual Area after considering Damage in Hectares	Avg Yield of Last 5 Years Per Hectare in KGS	Yield Loss expected for 2021	Actual Yield for 2021 Per Hectare in KGS	Estimated Production for 2021 in Metric Tons
Rajasthan	2,84,800	25%	2,13,600	400 Kgs	100 Kgs	300 Kgs	64,080
UP	4,00,500	50%	2,00,250	250 Kgs	80 Kgs	170 Kgs	34,042
MP	3,23,000	50%	1,61,500	250 Kgs	80 Kgs	170 Kgs	27,455
Gujarat	1,00,100	30%	70,070	500 Kgs	250 Kgs	250 Kgs	17,517
						Sub Total	1,43,095
Others	2,22,200	50%	1,11,100	200 Kgs	80 Kgs	120 Kgs	13,332
						Total	1,56,427 MT

Q&A:

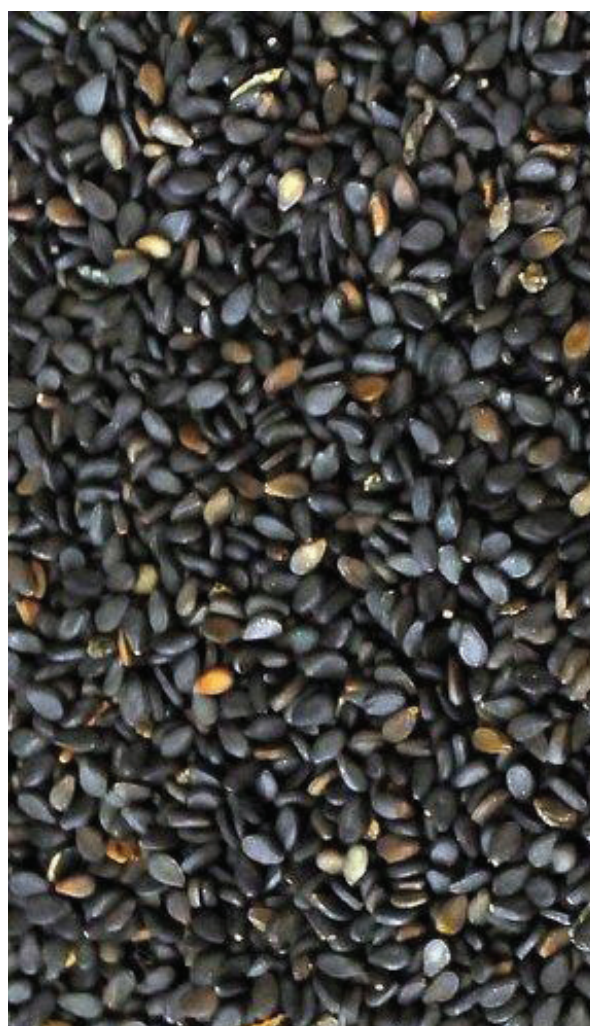
We estimate the Indian crop to be around 150,000 roughly, what would be the production break up of black, brown, and whitish varieties?

White makes up 80% of the production, while brown and black make up 20%.

Pure black comes largely from Gujarat, where we predict a small crop this year, but the crop in Rajasthan is normally mixed (brown/black), and we cannot separate it.

Is there any estimation of the summer crop's carryover?

According to my observations, the summer harvest has shrunk slightly compared to last year, and India presently has 70-80,000 tonnes of carryover stock.





Pakistan Sesame Crop and Market Overview, Mr Mahesh Raja Manglani, Director Commercial, Mast Qalander Group- Pakistan

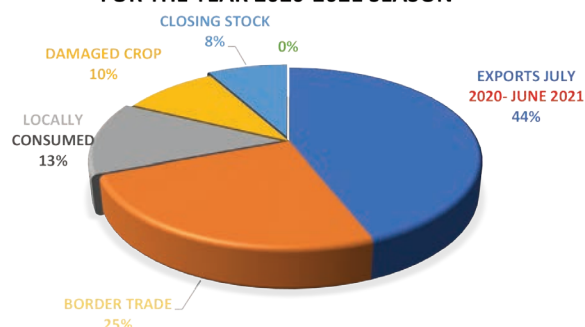
Pakistan's overall production is estimated in the region of 115,000 and 125,000 tons in 2020. Punjab accounted for 85 % of the crop, made up of Farmi and hybrid seed varieties. In contrast, Sindh only accounted for 15% of the natural white and mixed crushing quality produce.

Punjab's average yield was 240 kg per acre, whereas Sindh's average yield was 640 kg per acre. Around 15% of the crop was severely damaged owing to unseasonal rains in August and September.

FOR THE YEAR 2020-2021 SEASON

2020-2021(MTS)	Column1
Exports July 2020- June 2021	55,000
Border trade	31,400
Locally consumed	16,500
Damaged crop	12000
Closing stock	10,100
Total	1,25,000

FOR THE YEAR 2020-2021 SEASON

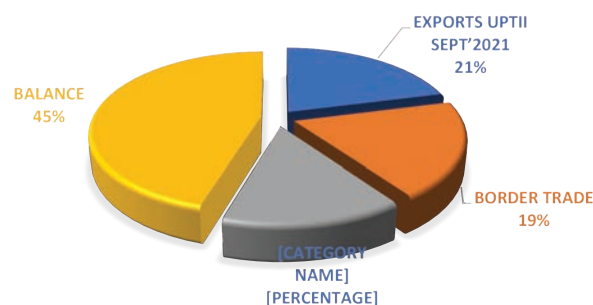


A glance at 2021-22 sesame crop

The predicted harvest size for 2021-22 is around 110,000-120,000 tons, with 80 % from Punjab and 20 % from Sindh. The average yield per acre is expected to be similar to that of the previous year. The primary harvesting season runs from the end of August and continues until early September.

This year, hybrid sesame type arrivals were ahead of Farmi, but Sindh sesame type arrivals have been active for the past two weeks, and the quality is superior to Hybrid in terms of seed size and appearance, and color. The PKR has depreciated this year, causing the local market to rise.

Expectations for the year 2021-22



Estimated Crop	(MTS)
Carry forward	10,100
Estimated crop idea	1,20,000
Exports up to Sept'2021	-27,312
Border trade	-25,000
Local consumption	-18,750
Balance	59,038

Owing to tremendous demand, panic buying, and the entry of new exporters, this season's crop may be over by the end of December or early January 2022.

Price scenario and factors driving demand

In Pakistan, local prices upsurge almost reached the highest levels due to huge demand and aggressive buying from China. Since harvesting and many local sellers, this kind of demand from China for sesame will drive the market further. Exporters are not interested in selling in bulk quantities at low levels (prices), as well as many Pakistani exporters did short sales, resulting in panic buying.

This year, local consumption and cross-border trade were deficient due to higher pricing; mostly, sesame seeds were exported. The harvest may cease on or before December 2021 if demand continues at the current pace. In addition, Government Policies and Covid-19 Challenges are at ease and have moved to normalize with no further difficulties apart from Higher Seas Freight, Vessels Skipping, and higher oil prices.

Chinese Importers accept that the Sesame Seeds Quality and Pakistan Origin is now preferred due to better quality, branding within China, and less transit.

Q&A:

Approximately half of the crop is still being exported to China's border / for local consumption. Prices of the crop harvested during the first half have risen from 1100 to 1600 dollars.

Prices are rising owing to panic buying from Pakistani exporters and Chinese importers. Apart from that, the US dollar has been rising every day while the Pakistani currency has been depreciating. When sesame seed arrivals first started, one Pakistan rupee was equivalent to 161-162 dollars now it is 175 dollars. Those who have stock are unwilling to sell and are waiting for the price to rise. For a few days, China was quiet, but they began to float query when prices increased in China.

What is the total number of hulling factories you have? Could you please elaborate on hulling capacity?

The majority of hulling demand for Pakistan originates from Europe; we have 5-6 hulling companies in Karachi and Punjab, with the rest going to local bakeries and other departmental stores.





Brazil - Better Quality- Less Quantity, Ms Camila Regina Lander, Correpar Farm Products

Current scenario: Strong Expansion of the production chain.



Quantity Exported in 2021

2021	EXPORTED 2021 -TON
JAN/21	3688
FEB/21	2660
MAR/21	2699
APR/21	5275
MAY/21	2122
JUN/21	1358
JUL/21	1949
AUG/21	2682
SEP/21	2570
TOTAL	25003

Source: COMEX STAT

The above chart depicts the monthly exports of Sesame during the 2021-22 Marketing year. The table shows that the highest quantity of exports happened in the 2nd quarter (AMJ), i.e., around 8,755 tons.

Brazil - Sesame major export destinations

Turkey is the primary export market for Brazilian Sesame, accounting for 6,682 tons, followed by Guatemala -5,411, India-3,881, Israel-3,154 and others-5,611.

COUNTRY	TONS 2021
TURKEY	6682
GUATEMALA	5411
INDIA	3881
ISRAEL	3154
ITALIA	1590
JORDAN	1360
NETHERLANDS	956
EGYPT	456
ALGER	424
GERMANY	415
VIETNAM	265
PERU	153
UAE	124
TAIWAN	114
SAUDI ARABIA	19

Source: COMEX STAT

Area Planted and Productivity

	CROP 2020	CROP 2021
AREA PLANTED	175 mil hectares	143,5 mil hectares
PRODUCTIVITY	547 Kg/ha	395 kg/ha
PRODUCTION	79,2 mil tons	56,7 mil toneladas
EXPORT	72 mil tons	51 mil tons*****
DOMESTIC MARKET	7,9 mil tons	5,67 mil tons

Source: CONAB (estimated)

Sesame farming competes with corn cultivation on land because corn prices and demand are more appealing than sesame pricing and demand. Hence area under sesame reduced by about 18.3%. Production is 56.7 million tonnes, compared to 79.2 million tonnes last year (YoY basis), due to lack of rains during important plant cycles. Compared to 2020, Brazil's total area, production, productivity, export volume, and domestic market have all dropped.

Perspectives for Brazilian sesame 2022

Crop expansion can happen in Brazil, but it depends on prices at other international markets. Increase market share in the global markets, identify potential sales to new countries in Europe with the recovery of economies post covid. Prices may rise as a result of foreign competition.

Sesame area is competing with corn due to higher costs and demand, more attractive than sesame. Other challenges include logistical issues such as a scarcity of containers and increased freight rates, which are likely to continue for some more time.

Challenges facing Brazil's Sesame in 2022

1. How to increase productivity to Anahi variety? As studies promised, Anahi's productivity was around 1600 kg/ha, but in 2020 was 220 kg/ha in some areas?
2. How to increase the productivity of sesame varieties like K3? Productivity can be around 600 – 1000 kg/ha, but in 2021 it was about 395 kg/h
3. How to increase black sesame productivity?
4. Enter into a Bilateral agreement with China, as Brazil does not yet export directly to China and
5. Higher cost of fertilizers.



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Sesame Situation in Paraguay, Mr Gilberto Ozorio, President, CAPEXSE (Paraguayan Chamber of Sesame Exporter)

Sesame is harvested between September and December. Harvesting takes place from January to May, with a potential yield of 1,200 kg/ha and an average yield of 550–700 kg/ha.

Edible grade sesame is produced entirely by family farming on small farms (less than 20 ha). The eastern region has 98 percent of the company's total output. It is well-liked for its taste and food safety. K2, SH1, Escoba, and Negro are likely to be among the variants.

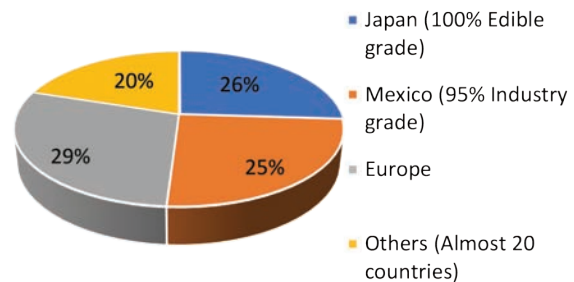
Industry grade sesame has outstanding grain quality, with an average FFA below 1% in recent years, and is grown entirely in the Paraguayan Chaco region on large farms Greater than 100 hectares. In large farms, mechanized handling is used. It has a lot of room to grow in terms of planting area.

For the years 2020 and 2021, the results are as follows:

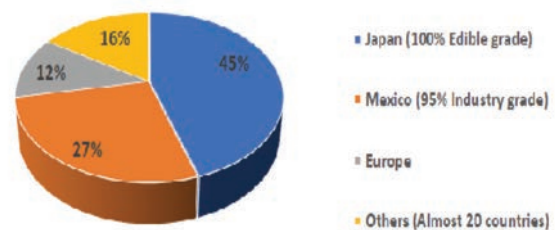
In 2021, the sowing area was over 82,500 ha, up from 82,000 ha in 2020, with edible grade accounting for

roughly 60% (white and black) and the remaining 40% being industry-grade. In 2021, the total output was identical to the previous year. In 2020 Paraguay sesame exports were 41,864 tons. In the first nine months of 2021, it has exported 31,127 tons.

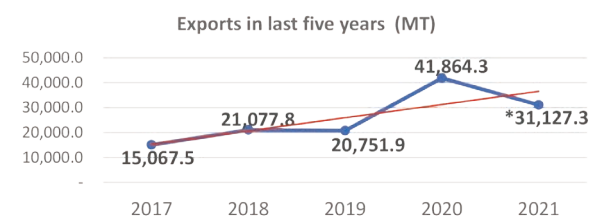
Main Markets 2021



Main Markets 2020



Projections



(*current year (Jan to Sep) (-----Trend)

For the next several years, there will be an increase in the demand for main markets for quality, a high diversification of destinations, and a high level of trust in primary markets.

Threats: Every year, climatic elements become less predictable. El Niño, La Niña, logistic factors, world and regional for being a mediterranean country.

Other factors to consider include a rise in the cost of labor to produce edible sesame grades, improved prices

es for farmers, and a large expansion possibility for the sesame crop.

High investment in the sector to trade hulled sesame seeds and to produce excellent tahini quality.

Q&A:

We have heard that Paraguay ships a lot of organic sesame; can you tell us what percentage is organic?

Paraguay is recognized for organic production. We work mainly with small farmers. Their use of chemicals and pesticides is very low, and we are working with the government to control the use of pesticides in the production of sesame. For around 5/6 years we had problems with pesticides, we have made much changes in agricultural practises and worked to in cooperating suitable varieties, we receive some help from the government viz., Japanese to guarantee organic production.





Impact of Shipping and Logistics Challenges on Nigeria Sesame Industry, Mr Abubakr Abiola, Head of Operations, Starlink Global & Ideal Limited.

Overview of Nigeria's Sesame Industry

Sesame is an important export crop in Nigeria, and Nigeria has a substantial role in the global sesame trade. Nigeria is the sixth-largest exporter of sesame in the world and the fourth-largest producer in Africa. In Nigeria, sesame is cultivated in 26 states, and the country produces around 0.7 MMT of sesame annually. China is the largest importer of Nigerian sesame, followed by Turkey, Japan, Vietnam, and South Korea.

Sesame Supply Chain Bottlenecks

The Current Supply chain crisis due to the Covid 19 Pandemic has created a sense of urgency for sesame suppliers to rethink their supply chains and the way they work with their factories and Vendors; along with this, the world is facing an energy crisis, as wholesale gas prices skyrocketing, and countries struggle to recover from shortages post-pandemic. A consistent rise in

wholesale gas prices has made utilities unprofitable, with no ability to pass costs on, and border shortages have increased demand for energy infrastructure. In addition, the blockage of the Suez Canal in the peak exports season has disrupted the supply of Sesame seeds to the world.

Impact of the crisis on the shipping

Port congestion is causing shipping companies to increase operational costs when freight rates have been soaring and capacity crunch is a challenge. As ships consume additional fuel waiting at anchorage or the port, many overhead costs start accumulating. Labor disruptions, infrastructure needs, marine terminal productivity, and equipment shortages, among other causes. The result is chronic gridlock at many ports. Ships stranded offshore for days, even weeks, waiting to get unloaded.

Overview of Nigeria's logistics & supply chain

- One of the fastest growing industries
- Valued at around \$700m though at a nascent stage.
- Ranked 112 in the Logistics Performance Index.
- 67% of deliveries do not meet up with the Goal of Logistics
- 97% of Exports from Nigeria is through the waterways
- 88% of export conducted through Lagos Port

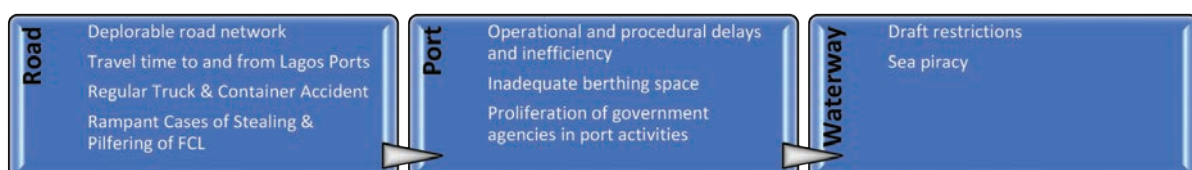
Current Mitigation of Shipping Challenges in Nigeria

- Reconstruction of the port access road
- Construction of standard gauge railway
- Use of barges for container movement
- Construction of Deep Sea Port
- Dedicated export terminal

Impact of Shipping and Logistics Challenges On Nigeria Sesame Industry

- High cost of Goods
- Delayed Shipments
- Longer transit Period
- Contract Default

Nigeria's Shipping and Logistics Challenges





Sesame quality control at the Community level: Experience with sesame seed producers' groups in Burkina, **Mr Boubacar Sow**, Chief of Party, SESAME Project Lutheran world Relief, Director, Sesame Marketing and Export project – USDA

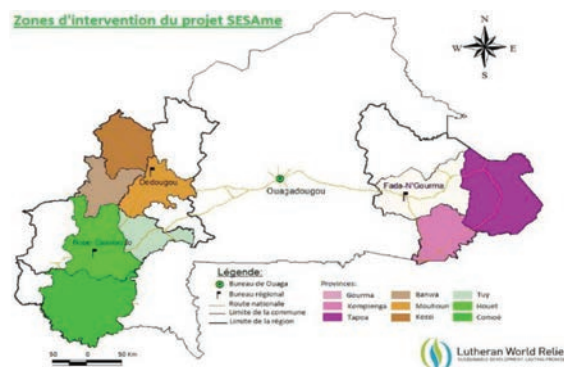
Background information on the project

Funding: \$ 28,192,456 food for progress.

Implementing farmers: LWR - Afrique Verte and Nitidae (ex RONGEAD) are the project's implementation partners.

Target: 421,476 indirect and 92,400 direct beneficiaries.

Intervention areas: Burkina Faso's Boucle du Mouhoun, East, Haut-Bassins, and Cascades regions, and the project duration is for six years, from September 2016 to September 2022.



Activities for the Sesame Project include:

- **Market Access:** Facilitate buyer-seller relationships
- **Capacity Building:** Producer groups/cooperatives
- **Market Access:** Facilitate Access to Market Information
- **Financial Services:** Facilitate agricultural lending
- **Capacity Building:** Promote improved policy and regulatory framework
- **Infrastructure:** Post-harvest handling and storage
- **Capacity Building:** Agriculture Extension Agents/ Services

414 Producers Enterprise Agents (PEA) for extension services

Increased production and exports of high-quality sesame through a communication and information technology (ICT) center that enables information and transaction flow that will develop the capacity of targeted farmers, unions, and exporters and facilitate access to financial services.

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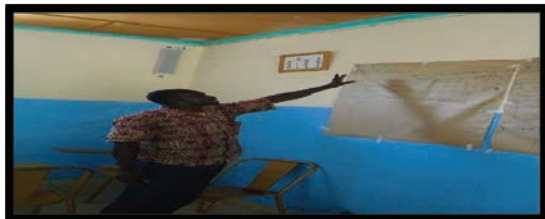


IDHAYAM

Sesame oil



Farm Business schools



Record keeping



DEVELOPING BUSINESS ATTITUDE AMONG SESAME COOPERATIVES

The Occupational Health and Safety Act (OHADA) / Strategic and operational planning

Production campaign planning

Budgeting and planning for a trade finance campaign

A provisional operational account is being created.

Planned activities are carried out, monitored, and evaluated.

Sales and procurement strategies for groups

More Connection to Market

To ensure long-term impact beyond the project's life, create durable ties between buyers and sellers, and develop producer unions.

- Access to banks and MFIs for loans
- Pre-marketing campaign
- B to B meeting



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pour mieux vendre et acheter le sésame.

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Compose le 321
- 2 Choisis la langue dans laquelle tu
veux écouter les informations pour
mieux comprendre
(français - mooré - dioula)
- 3 Choisis informations du produit
que tu veux : (sésame)

Et bien plus encore :

- Écoute aussi les conseils sur les bonnes pratiques de
production, les informations sur la météo, etc.
- Tu peux aussi t'inscrire sur le 321 pour recevoir un signal
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25 F CFA par appel*
4 Appels GRATUITS
chaque mois

*Taux Jan 2019 - Sans débourser de modulation dégressive

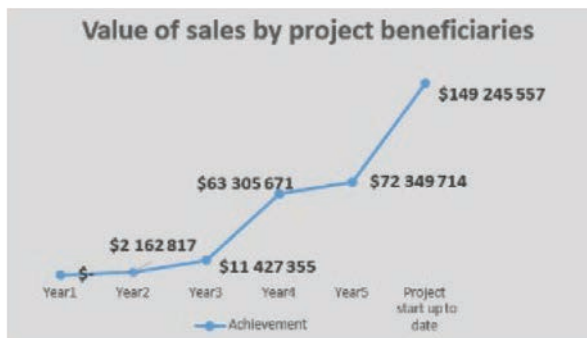
USDA
L'Union Africaine
GIZ
via

- MIS 321
- Post-harvest infrastructure and Equipment

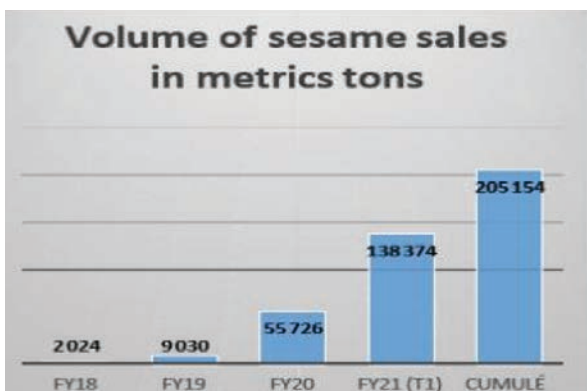


Keys Results

- Increased the number of cooperatives from 77 in 2018 to 178 in 2021, with a total value of \$149 245 557 in sales by project beneficiaries since the start of the project.



- Between 96 and 98 % of the Sesame sold in cooperatives is clean, compared to a target of 90%.



Lesson learned

- Cooperatives are key drivers for self-reliance
- Collaboration with technical services has been vital in the implementation of the project. This has enabled the rapid transformation of sesame producer unions into cooperatives.
- PEA can also play a more significant role for producers' organizations, mainly supporting leaders in management documents (record keeping), planning activities, and compliance with administrative and financial procedures.
- Low capacity of some cooperatives to coordinate more extensive bulked sales. Grouped sales are carried out over a few days.
- Focus on building collection points instead of Warehouse





Special address-1

The paradigm shift in eating habits with a focus on sesame seeds, **Mr Rutuparna Dole, Director Exim, Bora Foods Private Limited.**

Sesame seed is primarily grown in Asia and Africa's tropical and subtropical regions. Sesame has a wide range of applications, ranging from direct consumption as food to an ingredient in cosmetic and pharmaceutical products. It has the highest oil content and a rich nutty flavor, making it a popular ingredient in cuisines worldwide.

Industry-wise usage of sesame seeds

- The whole sesame seeds are used topping on bakery products and food preparations such as snacks, crackers, confectionery (sweets), and salads (dressing and sauces). Ethnic cuisine products like Tahini, Hummus, Sushi, Halva, and Asian confectionery have sesame seeds as a significant ingredient.
- The Sesame seeds oil has wide acceptance in the food industry. The global sesame oil market is anticipated to expand at a value CAGR of around 5.5 percent over the 2021-2031 forecast period to reach a valuation of US\$ 10.7 Bn. Sesame oil consumption steadily rises worldwide due to

shifting consumer habits and increasing health consciousness. Consumers nowadays favour products with high nutritional value.

- The increase in Sesame seed consumption can also be seen due to its increasing application in the Pharmaceutical, Cosmetics, and Skincare industry. Sesame oil and its derived ingredients are widely used in the skincare industry.
- Sesame oil is used in Far East Asian cuisines as a cooking oil. Due to its high nutritional values, cold press sesame oil is accepted in the post covid scenario.

Consuming markets with their traditional sesame seeds applications (applications are mentioned in descending order)

- **Europe and North America:** Topping, bakery, and ingredients for snacks.
- **South Korea:** Oil extraction is mainly a flavor enhancer rather than essential cooking oil.
- **China:** Oil extraction mainly as a flavor enhancer, Sesame paste, Bakery, and ingredient for snacks.
- **Japan:** Oil extraction and as edible grade (Hulled, Roasted and Sesame seeds paste)
- Other than the above major consuming markets, there are other markets where sesame seeds are used as a functional ingredient in the food industry.

The paradigm shift in the consumption pattern for sesame seeds

- The popularity of these seeds has increased significantly over the recent past, with product launches, as consumers are more inclined towards natural and wholesome ingredients. The market is driven by consumer preference towards functional and health-based naturally derived products.
- Across the world, there is a growing appetite for healthy ingredients in diets among consumers, especially the millennial population across North America and Europe.

The ongoing COVID-19 pandemic compelled the consumers to rethink their consumption patterns, which has led to the growth in demand for healthy ingredients, which has created an opportunity for sesame seeds as an ingredient to various food and personal care products.

- The nutritional profile of these seeds has gained consumer attraction over the last few years.
- Cereal bars like Sesame Honey Energy Bars are high on demand. All overworldwideations like ready-to-use tahini, snack options with black sesame and sesame milk are also expected to boost the market for sesame seeds.
- Despite the recently strong fluctuation in value, positive growth is visible over a more extended period. This provides opportunities for sesame in new products, but it also confirms an increasing consumption of foreign ethnic products with sesame such as tahini, hummus, and sushi.

Sectors in which sesame seeds consumption is expected to increase

- Based on its application, the global sesame oil market is segmented into three main segments- food, cosmetics, and dietary supplement.
- Lately, it has been observed that demand for healthy oils in Europe is increasing at a much larger pace and sesame oil is at the forefront due to its high nutritional value. This increase in consumption is backed by sesame oil in salad dressings and is often marketed as high-quality oil.
- The plant-based protein market is expected to grow at a CAGR of 9.5 percent from 2020- 2027 to reach USD 21.23 Bn.
- The Covid- 19 situation substantially boosted the sales of plant-based products, which proved beneficial for all stakeholders in the plant-based protein market.
- With increased consumer preference for plant-based protein, sesame seeds are expected to play an important role. Already, the sesame seed beverage “ sesame milk” is in the market and gaining acceptance.
- Sesame seed is immersing as a crucial plant-based protein source. Sesame meal and sesame flour have high protein content, and it has been recommended as a protein supplement along with soya and legume proteins.
- [Sesame flour usage is increasing for preparations of bread, protein biscuits, and in formulating high protein beverages.](#)
- [Sesame Seeds paste/butter \(Tahini\) is gaining popularity and is anticipated to exhibit the highest CAGR of 4.8 percent from 2020 to 2025.](#)
- The mainstreaming of ethnic foods like- Tahini, Sesame halva, Hummus, etc., and the increasing interest in vegan food contributes to a growing demand for sesame. Germany and Greece are currently the largest markets, but there is also potential for growth in Poland, France, and Italy.
- In countries like China and Japan, an increase in trend can be noticed amongst consumers to use Sesame oil for cooking.
- Growing awareness of the benefits of sesame oil in skin and hair products and increased acceptance of sesame oil in various cosmetics items will likely propel the global market forward over the coming years.
- Premium cosmetic industry, where demand is skyrocketing, sesame seeds oil is preferred.

Concluding remarks

- Sesame seeds are highly nutritional and flexible in terms of applications.
- It is a high-quality plant-based protein source available at a reasonable price.
- As the consumer preferences are shifting towards functional and health-based naturally derived products, this is the right time that all the stakeholders should play their respective roles in marketing and creating awareness about sesame seed's health benefits and their wide applications in the food industry.
- With a lot of ongoing research about sesame seeds and their applications in the food industry, there is no doubt that in the coming time, many value-added products of sesame seeds will be available in the market to cater to consumer eating habits, increasing sesame seeds consumption.

Q&A:

Would you like to tell us about one or two innovations that occurred in India during Covid-19?

Rather than new applications, traditional dishes, which we forgot, resurfaced during post-covid. Everyone, men and women alike, attempted to cook and demonstrate their culinary abilities, as well as sample a variety of healthful foods, and participants learnt that sesame can be used to make a variety of items.



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Special address -2

India sesame oil market: Opportunities for growth, **Mr V R Muthu, VVV & Sons Edible Oils Limited.**

India is the world's largest producer of sesame oil. A total of 1600 tons of oil are produced each month. Every month, we require 4000 tons of sesame seeds to produce around 1600 tonnes of sesame oil, as well as we make 2200 tons of oil cake. We have been in the Sesame Business since 1943, and in 1986, launched the iconic brand "Idhayam," which means "hruday" (heart). When we first started the company, gingelly oil was a commodity, but we turned it into a brand, and today it is a very popular brand.

Price was ₹7 per litre in 1974-75; today's price is ₹267 per litre - an 80-fold increase in price since 1974-75, considered inflation. Sesame oil cake is now priced at ₹44+ taxes per kilo, with prices as low as ₹40 and as high as 57/kilo+ taxes this year. Sesame cake has been widely used as cattle feed, and poultry feed has been available on the market for the past six years due to rising soybean costs. Sesame was substituted for soya in poultry feed.

We export over 25 nations worldwide, from Toronto in Canada to Sydney in Australia. We export 10 percent of total edible oil production to other states in India, while the remaining 80 percent is concentrated in Tamil Nadu.

Ghee is made from ellu nei, a sesame seed. Sesame oil is called nallennai in Tamilnadu and Manchinoone in Andhra Pradesh.

Except for West Bengal, sesame seeds were obtained from Tamil Nadu, Andhra Pradesh, Gujarat, Rajasthan, Uttar Pradesh, and Karnataka. The crop in India ranges from 500,000 to 700,000 tons. A total of 11 lakh tons have been grown in African countries.

A magnificent incident occurred when a distributor in Mumbai received a call at night, asking him to supply two litres of sesame oil. The call came again, asking him not to disconnect and saying, "This sesame oil will be taken to Delhi, and the next day it will be taken to Moscow, Honourable Prime Minister Mr Narendra Modi's breakfast, which includes idly, chutney, and chilli powder; don't you think sesame oil of Idhayam for dinner is the impact that sesame oil has created.

Q&A

Do you source sesame seed from Africa? What are the typical quality specifications?

We are keen on procuring sesame from India, as we have enough materials available here with excellent quality. Moreover, if we procure from Africa, there will be an import duty. Therefore, it is not competitive for us to import from African countries.

Typical quality requirements

A maximum of 3% free fatty oil is permissible in India; however, our company's specification is less than 1.5 percent, free fatty acid. As per this condition, we only acquire high-quality sesame seeds in India, and at times, we even get free fatty acids that are less than 1%. If the free fatty acid content is 1% or 1.5 %, the oil becomes very palatable and tasty.

There is black sesame oil and white sesame oil. Which one, in your opinion, is suitable for human consumption?

We do not distinguish in colour. For us, black, brown & white is the same. In the south, we get brown, and it's of extraordinarily good quality. white seeds are available in Gujarat; as well as mixed colour quality. As far as the colour is concerned, the egg is white; whatever may be the colour of the hen. Similarly, if sesame seed is well grown, it gives perfect oil irrespective of colour, colour does not make any difference as far as we are concerned.

Panel:2 Global Sesame Markets: Trends and Outlook

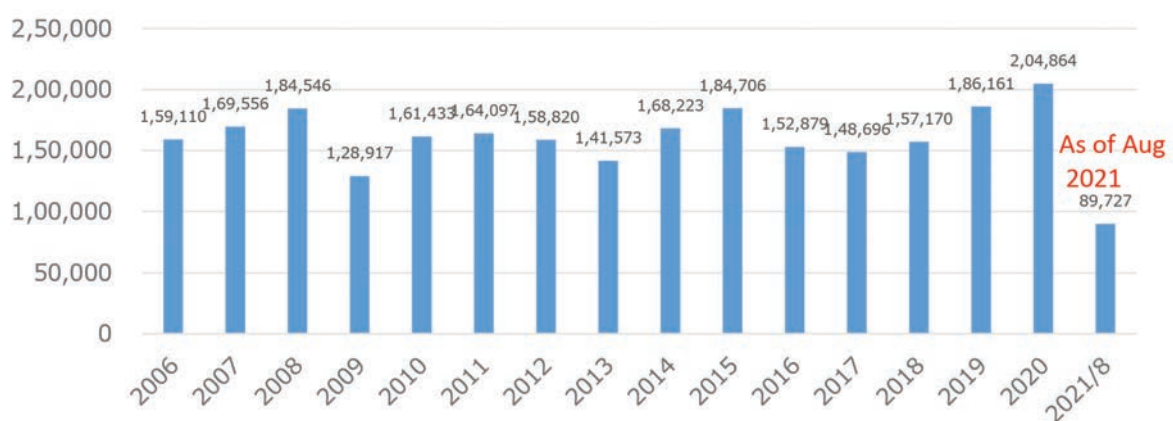


The session was moderated by
Mr Mukul Gupta, Shakumbhri Expo
Impo Limited



Japan Sesame Market Trend,
Mr Tomohisa Fujimoto, Team
Leader, Mitsui&CO.LTD

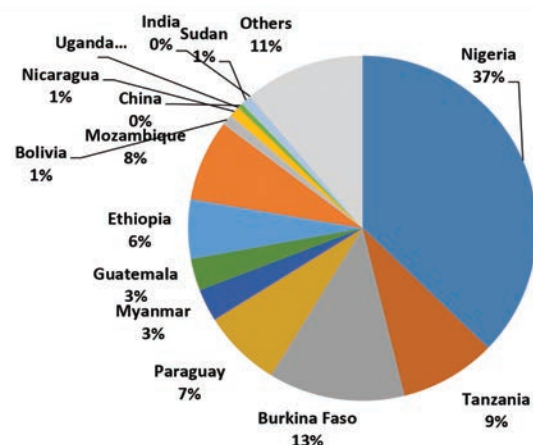
Japanese Import Volume



Overview of the Japanese market

- The average yearly import quantity is estimated to be 160-170,000 metric tons, but sesame demand has recently increased. Consumption of sesame oil, in particular, is beneficial. Sesame oil makes it simple to achieve flavour and taste, which is why it's becoming more popular in home cooking.
- The crushing-to-edible ratio is 60 % (120-130K metric tons) – 40% (70-80K metric tons).
- The Japanese market prefers stable supply.
- Manufacturers are in charge of their inventory. (The trading firm does not have its stake.)
- Each edible sesame producer has its preferred origin.

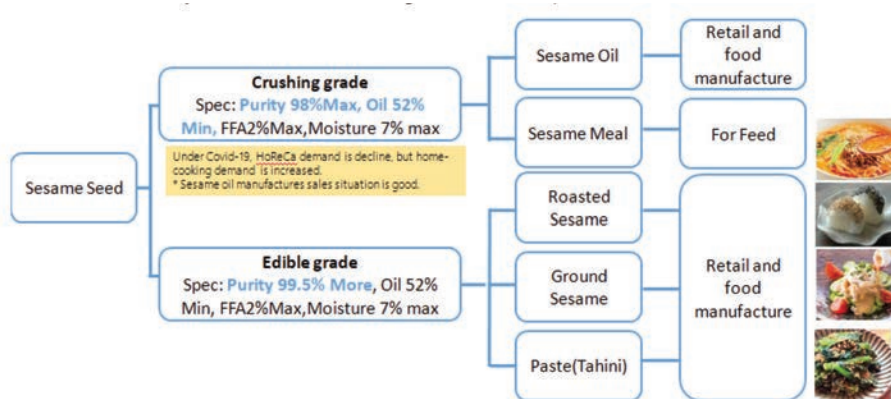
Japan's Export Destinations (2020)



- The crushing- and the edible ratio is 60-65 percent (120-130K MT) and 35-40 percent (70-80K MT).
- Nigeria(37%), Burkina Faso(13%), Tanzania(9%), Mozambique(8%) are the top four suppliers, which are used for crushing purposes mainly.
- Imports from Paraguay, Ethiopia, Myanmar, and Guatemala are primarily used for edible purposes.

Sesame usage in Japan

Sesame seed is typical food for the Japanese. Sesame oil, roasted sesame, ground sesame, and paste are all made from sesame (Tahini).



Import statistics for 2021 and 2020

For the year Jan-Aug 2021

As of Aug.2021	TOTAL	%	(JAN)	(FEB)	(MAR)	(APR)	(MAY)	(JUN)	(JUL)	(AUG)
TOTAL	89,952		8,793	8,216	10,216	9,311	13,907	15,788	10,757	12,964
NIGERIA	38,890	43%	3,429	1,593	2,695	4,489	7,582	6,410	6,371	6,321
MOZAMBIQUE	7,570	8%	2,264	3,061	677	299	303	95	312	559
GUATEMALA	7,544	8%	66	455	1,054	1,066	1,811	2,398	413	281
PARAGUAY	6,751	8%	1,237	1,018	1,525	1,139	622	411	0	799
BURKINA FASO	4,722	5%	0	500	0	274	187	1,934	517	1,310
MALI	2,865	3%	0	0	0	0	1,578	794	493	0
SUDAN	2,597	3%	0	0	0	0	105	755	1,073	664
MYANMAR	2,338	3%	187	579	602	154	400	169	24	223
PAKISTAN	2,334	3%	107	53	800	297	127	54	90	806
SOMALIA	1,974	2%	0	0	1,081	303	0	411	179	0
MEXICO	1,810	2%	127	24	98	212	271	474	418	186
NICARAGUA	1,713	2%	206	114	568	465	205	155	0	0
ETHIOPIA	1,688	2%	188	150	0	0	410	454	114	372
EGYPT	1,010	1%	193	287	202	95	0	61	94	78
TANZANIA	964	1%	303	0	0	0	0	359	0	302
OTHER	5,182	6%	486	382	914	518	306	854	659	1,063

Nigeria (38,850) is the leading importing country in August 2021, accounting for 43% of total importing volume, followed by Mozambique (7,570), Guatemala (7,544), and Paraguay (6,751), all accounts for 8% share each.



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For the year 2020

2020	TOTAL	%	(JAN)	(FEB)	(MAR)	(APR)	(MAY)	(JUN)	(JUL)	(AUG)	(SEP)	(OCT)	(NOV)	(DEC)
TOTAL	204,864		11,330	14,807	18,080	16,178	21,400	23,239	14,895	15,677	19,581	20,036	13,875	15,766
NIGERIA	76,208	37%	3,436	4,738	6,277	8,097	9,647	10,000	6,613	6,225	6,712	6,224	3,763	4,476
BURKINA FASO	25,925	13%	0	0	2,677	1,137	4,321	6,280	3,838	5,137	1,656	584	295	0
TANZANIA	18,296	9%	1,178	1,253	0	0	0	0	0	303	2,368	6,065	3,024	4,105
MOZAMBIQUE	15,585	8%	3,132	4,571	2,587	451	739	0	35	100	209	918	742	2,101
PARAGUAY	15,019	7%	232	819	378	331	51	103	333	1,598	3,802	3,093	2,167	2,112
ETHIOPIA	11,419	6%	717	417	1,058	1,566	2,255	1,286	1,006	415	1,868	348	483	0
MYANMAR	6,206	3%	1,083	1,451	1,457	576	698	388	205	148	0	105	0	95
GUATEMALA	6,116	3%	201	279	922	763	424	1,810	378	764	104	252	129	90
SOMALIA	3,850	2%	0	0	0	305	503	522	693	0	946	0	334	547
TOGO	3,088	2%	0	0	303	0	267	302	608	0	875	733	0	0
MALI	2,957	1%	0	0	113	1,194	967	683	0	0	0	0	0	0
OTHER	20,195	10%	98	267	207	245	585	615	103	274	141	192	122	35

In 2021 (Jan-Aug), the import quantity is anticipated to be 89,952 metric tons, compared to 1,35,606 metric tons in 2020. Compared to the previous year, there will be a 34 percent shortfall in 2021.

Trade challenges

- Pesticide regulation (Positive list): Sesame seed regulation is stringent; therefore, trading companies and Sesame oil/edible manufacturers have analysed the cargo after arrival to prove safety.

Solution: Education farmers and local traders about the correct usage of pesticides.

- Quality Issue: POD analysis result is over spec frequently. Especially Purity is over 98%, and Oil is less than 52%. Japanese trading companies bear the cost of spec difference between fact and spec. (Standard spec is Purity 98%, Oil 52%, FFA 2%, Moisture 7%)

Solution: Under the circumstances of Covid-19, Africa's factory control has become tough, so please pay more attention to quality control.

- PP bag Issue: Under the Japanese Food Sanitation Act, designed and coloured PP bags maybe not be allowed. It is a risk of contamination of heavy metal from ink. For the Japanese market, a plain white PP bag is preferred.

Solution: The safest option is to avoid using coloured and designed PP bags.

- Shipment delay: The same is true in other markets. In comparison to 2020, the majority of cargo has been delayed. As a result, the import quantity in 2021 will be lower than in 2020.

Solution: It is uncontrolled once understood. As a result, please provide shipping information on time.



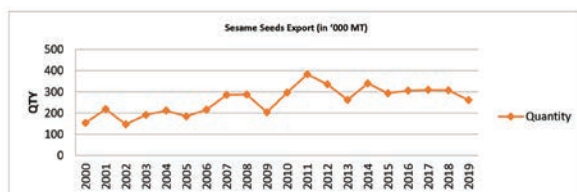


Indian sesame import market, Mr Mihir Parmar, Partner, Mamta Commodities LLP.

Production and demand in India

- The Indian sesame crop is harvested twice during summer and winter twice a year. India's total production is estimated to be between 6,00,000 and 7,00,000 MT (Avg.) Around 300,000 tons have been exported. Indian cargo has massive import as well as export demand.

In addition to export demand, Indian Crop has a domestic market.



Need for import

- Indian size of the local crop varies, and sometimes a short harvest combined with the strong local market demand can deter Indian exports.
- Indian sesame exports are mainly processed sesame like Hulled or Sortexed sesame rather than machine cleaned. More than 40 Hulling plants in India cater to local and export demand.

To support the export of the value-added products,

India imports sesame from more cost-effective origins to fulfil the global demand

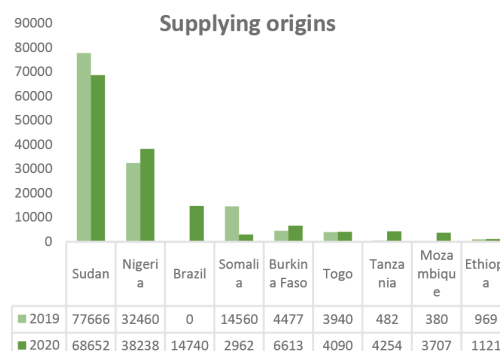
Feasible conditions for Indian import

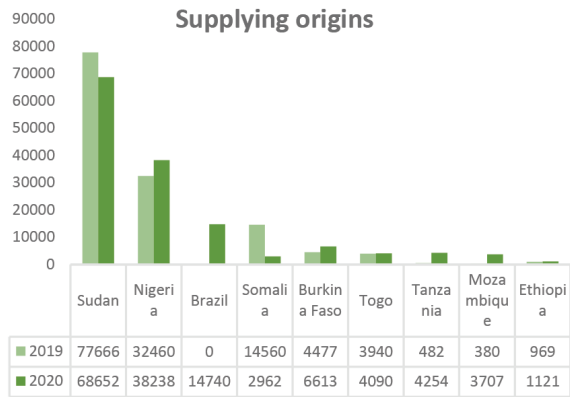
- What aspects do Indian buyers take into account when importing?
- The current state of the market and its forecasts. Is the market bullish, bearish, or in a neutral state?
- Global demand.
 - Is there good demand for Indian cargo?
- Transit time is the amount of time it takes for something to happen.
 - 45-60 days in Brazil
 - 40-50 days in Nigeria
 - 25-35 days in Sudan
 - 12-15 days in Tanzania
- The imported cargo's hulling yield and sortex yield.
 - 77/80 percent hulling yield for Indian cargo
 - Red cargo yield in Sudan is 80/83 percent.
- Costs of clearing and transportation
 - Clearing costs around \$60 per MT, with variable transportation costs.
- Local market price against imported goods price.

Who can import in India

- 36 percent import duty makes imports unviable for general importers.
- Advance Authorisation Scheme (Advance license) allows the Indian exporters of sesame seeds to import the raw material required for making value-added products (Hulled Sesame Seeds) without bearing duty on raw material.
- Exporters have their processing unit to import to India with an obligation to export 75 percent of processed sesame seeds.

Indian import statistics and suppliers





- Sesame seed imports increased from 20,700 -145,000 tons (2012-2020).

Trends and outlook

- Indian crop production appears to be declining year over year, while imports increase. India's imports would continue to rise unless its production increases.
- Due to shorter transit times and lower freight prices, India will continue to be a popular export destination for most worldwide exporters.
- Imports to India appear to be challenging this year unless local prices in India rise a little or worldwide prices for sesame seeds fall to a reasonable level for imports.



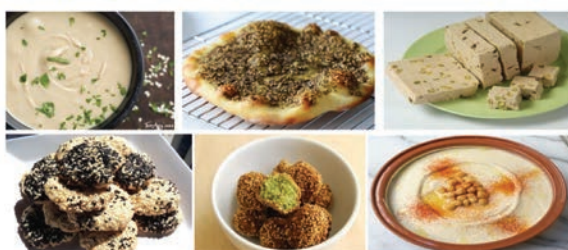


Sesame market review and outlook, Mr K S Prakash, Business Unit Director, Hakan Foods DMCC, Dubai, UAE

Sesame history in the Middle East

Sesame is the world's oldest oilseed, as well as in the Middle East. It was employed for medical purposes in ancient times, crushing sesame in the ancient Middle East, and tahini, a staple dish in the Middle East.

In the Middle East, sesame is mainly used to create tahini/humus. It's a flavour enhancer commonly found in halva, sweets, and confectionery.



Overview of sesame consumption in the Middle East

The total consumption is estimated to be around 200,000 metric tons. Jordan is the largest customer, with 70,000 metric tons consumed, followed by Lebanon and Saudi Arabia with 40,000 metric tons and others with 50,000 metric tons.

Current difficulties in the Middle East

- Political issues in Lebanon
- Saudi Arabia's transit business to Yemen has come to a halt.

- Sanctions imposed on Iran
- Covid and its consequences

Overview of Egypt

- Local Crop –35/40,000 metric tons
- Import –70,000 metric tons
- Main applications – Tahini and Halva
- Border Trade between Sudan/Egypt
- Transit Business – Natural and Processed sesame seeds

Overview of Turkey

- Import – About 170,000 metric tons doesn't include transit cargos. Some cargos from Turkey are getting re-exported. Also, if we consider this total import into Turkey will be above 200,000 tons.
- Turkey produces a small number of golden sesame seeds, and the quality of sesame seeds is very high hence sold at a high premium.
- Main Usage – Tahini, Halva, and Confectionery
- Change of consumption pattern – Sudan / Chad
- Challenges of sesame trade in Turkey
- Possibility of hulled export to Europe and North America
- Future of sesame trade
- This year, Ethiopia is expecting a short crop so that Egypt can be the gateway to sesame seed requirement to Israel, as export from Sudan to Israel directly is still not possible. [The sweetness of Chad's sesame made it famous. Production is projected to be between 120,000 and 130,000 tons.](#)

Q&A:

When does the chad crop arrive, and how good is the quality is compared to neighbours? Where would you put those crop seeds?

Chad's harvest is usually around the second half of November. It arrives in Burkina Faso in the second half of November. Previously, the chad production was roughly 25-30,000 tonnes; however, it has gradually increased and presently exports around 100,000 tonnes. The good thing about this crop is its sweetness which goes well for tahini and the confectionery industry

As of August, Japan's volumes were 45,000 tonnes lower than last year. Do you think they will be able to make it up in the coming months?

In my opinion, it is not possible to make up the shortfall of 45,000 tons in the coming months; Due to covid, consumption may have gone down due to lockdown, closure of HORECA segments etc. and they may be having high carryover stocks.

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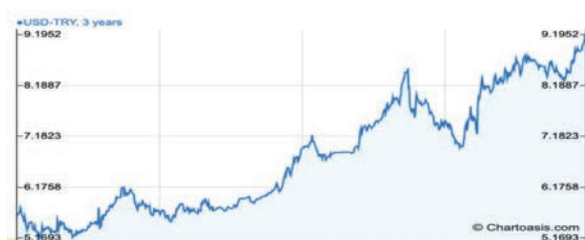


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Overview of sesame market in Turkey 2021-2022, **Mr Alper Onel**, Chairman, Orgin Agro Trade Ltd.

US Dollar –New Turkish Lira rate



Total sesame export including Natural, Hulled, and transit sales

IMPORTERS	2016 Exported quantity, Tons	2017 Exported quantity, Tons	2018 Exported quantity, Tons	2019 Exported quantity, Tons	2020 Exported quantity, Tons
WORLD	5,737	7,048	13,919	33,411	37,050
IRAQ	1,074	2,609	1,474	7,501	7,896
GREECE	154	337	2,523	2,187	7,491
SYRIAN ARAB REPUBLIC	341	164	626	8,220	5,471
GERMANY	45	382	2,204	4,557	3,008
NETHERLAND	14	23	394	1,770	2,108
LEBANON		103		35	1,625
ISRAEL	396	858	1,095	2,127	1,605
JAPAN	3,401	1,425	1,499	1,593	1,230
UNITED STATES OF AMERICA	47	8	520	1,316	695
POLAND	91	154	616	594	654
ISLAMIC REPUBLIC OF IRAN	1		168	144	6
OTHERS	173	1985	2800	3367	5261

In 2020 global sesame exports were recorded by 11% at 37,050 tons against last year's exports of 33,411 tons. The highest exports witnessed from countries like Iraq, Greece, Syria, Germany, and Netherlands contributed around 77% of the total global exports.

Total Export of Hulled Sesame Seeds

IMPORTERS	2016	2017	2018	2019	2020
	EXPORT QUANTITY KILOGRAMS	EXPORT QUANTITY KILOGRAMS	EXPORT QUANTITY KILOGRAMS	EXPORT QUANTITY KILOGRAMS	EXPORT QUANTITY KILOGRAMS
WORLD	2,287,534	5,467,552	11,991,120	9,902,347	10,387,030
GERMANY	26,548	361,301	2,183,600	3,532,690	2,348,113
GREECE	30,000	238,530	2,345,900	1,457,388	1,622,350
IRAQ	1,072,583	2,607,214	1,474,004	572,455	1,469,002
NETHERLAND	11,229	20,614	393,955	569,670	793,897
POLAND	91,400	153,700	616,000	488,275	564,000
UNITED STATES OF AMERICA	47,319	7,862	520,078	855,519	534,591
ROMANIA		146,800	450,975	516,675	429,101
SYRIAN ARAB REPUBLIC	341,440	164,000	617,300	303,200	278,580
FRANCE	3,177	2,181	5,682	80,125	266,795
LEBANON		102,800		34,750	265,387
GERMANY	383,730	858,110	1,072,060	185,345	242,050
OTHERS	280,108	804,440	2,311,566	1,306,255	1,573,164

The surge in Sesame production during 2020 helped dispatch more exports during the season. The exports hulled sesame seeds during 2020 up by five percent at 10,387,030 Kgs has compared to last year. The surge in exports leads to higher supplies from Germany, Greece, Iraq, and others.

Hulled sesame export between November 2020 and July 2021

	2021-M01	2021-M02	2021-M03	2021-M04	2021-M05	2021-M06	2021-M07
IMPORTERS	Exported quantity, Kilograms	Exported quantity, Kilograms	Exported quantity, Kilograms	Exported quantity, Kilograms	Exported quantity, Kilograms	Exported quantity, Kilograms	Exported quantity, Kilograms
WORLD	2,087,094	1,954,459	2,452,164	1,835,244	1,699,292	1,319,905	771,184
GREECE	773,420	732,830	1,169,501	523,003	549,400	384,000	270,000
POLAND	142,000	194,000	166,000	190,000	280,000	208,000	190,108
ISRAEL	7,000	0	0	0	0	54,000	72,000
GERMANY	452,902	234,193	353,759	335,930	84,775	205,381	68,872
FRANCE	84,101	25,168	18,262	71,291	90,912	1,080	41,000
NETHERLAND	158,632	149,830	55,599	146,959	307,136	113,990	38,000
CYPRUS	42,891	0	566	12,090	0	6,969	26,185
ROMANIA	115,500	100,300	197,725	66,025	22,000	18,750	22,300
OTHERS	310,648	518,138	490,752	489,946	365,069	327,735	42,915

The Global hulled sesame exports have started declining M-o-M, the highest exports recorded during March at 2,452,164 Kgs.

Turkey's total sesame seeds import

EXPORTERS	2016	2017	2018	2019	2020
	Imported quantity, Tons	Imported quantity, Tons	Imported quantity, Tons	Imported quantity, Tons	Imported quantity, Tons
WORLD	137,011	145,812	152,237	184,244	223,162
NIGERIA	74,132	67,812	77,544	82,770	75,495
CHAD	13,758	14,588	16,725	23,739	54,153
SUDAN	14,399	30,511	30,073	36,567	47,576
MOZAMBIQUE	478	4,507	143	5,428	6,209
BRAZIL	363	198	408	2,186	5,786
ETHIOPIA	11,711	11,716	11,333	10,023	5,208
GUINEA	3,429	2,301	3,101	2,105	3,867
SOMALIA	414		273	3,319	3,525
UGANDA	784	1,774	2,789	2,931	3,340
BURKINA FASO	489	1,364	749	2,514	2,922
TOGO	1,323	752	371	1,852	2,625
EGYPT	1,178	689	534	2,120	2,133
OTHER ORIGINS	14,553	9,600	8,194	8,690	10,323

In 2020, Global sesame imports rose by 21% at 223,162 tons compared to last year's imports of 184,244 tons. Nigeria, Chad, Sudan, and Mozambique are the largest exporters of sesame globally.

IMPORT OF NATURAL SESAME SEEDS FROM JANUARY 2021 TO JULY 2021

EXPORTERS	2021-M01	2021-M02	2021-M03	2021-M04	2021-M05	2021-M06	2021-M07
	Imported quantity, Kilograms	Imported quantity, Kilograms	Imported quantity, Kilograms	Imported quantity, Kilograms	Imported quantity, Kilograms	Imported quantity, Kilograms	Imported quantity, Kilograms
WORLD	9,358,678	15,703,174	19,927,506	21,671,131	22,461,261	20,514,931	17,625,372
CHAD	2,201,502	5,423,500	6,812,350	6,881,100	11,038,000	9,326,937	7,737,550
SUDAN	2,358,807	2,126,605	3,182,294	1,420,070	2,406,961	2,202,001	5,392,509
NIGERIA	2,677,966	5,027,424	4,953,269	8,152,394	4,380,506	3,414,705	1,048,593
ETHIOPIA	494,000	304,001	315,001	1,173,440	993,440	323,500	798,000
SOMALIA	180,000	203,000	0	88,850	439,050	882,300	526,450
PARAGUAY	0	544,000	0	80,110	369,994	104,846	517,724
BRAZIL	382,480	199,750	220,700	162,000	1,208,440	2,246,850	454,950
UGANDA	76,001	190,050	380,000	424,000	191,500	399,007	253,100
MALI	0	0	55,920	301,730	189,600	94,867	196,000
GUINEA	0	0	581,500	820,449	301,900	0	146,392
SYRIAN ARAB REPUBLIC	282,750	361,550	410,075	101,850	129,850	180,400	99,090
SENEGAL	0	0	223,450	0	0	0	95,000
OTHER ORIGINS	702,172	1,323,294	2,792,947	2,065,138	812,020	1,239,518	360,014

The Global Natural Sesame seed imports between Jan and Jul 2021 are depicted in the table. The table shows that the highest imports happened during May and the lowest imports happened in Jan.

Sesame Prices - Historical Annual Data (Note: All Prices for CFR Mersin/pmt)

MONTHS/YEARS	2019	2020	2021
JANUARY	1405-1420usd/kano 1430-1450usd/benue 1460-1480usd maidu	1250-1280/ bauchi 1280-1310/lafia 1270-1290/burkina mix	1250-1270/lafia 1290-1310/burkina mix 1280-1310/chad 1530-1550/humera
FEBRUARY	1440-1470usd/bauchi 1530-1560usd/maidu. 1390-1410usd/gambia	1310-1330/maidu 1270-1290/conakry 1350-1380/non-gedaref 1520-1540/humera	1260-1280/lafia 1300-1330/chad 1200-1220/ivory
MARCH	1510-1530usd/maidu 1530-1550usd/tanzan	1210-1230/somalian 1240-1260/togo whitish 1235-1260/lafia	1200-1230/conakry 1290-1310/burkina mix 1270-1300/non-gedaref
APRIL	1570-1590usd/benue	1290-1310/conakry 1350-1370/ tanz.white 1350-1370/non gedaref	1290-1310/burkina 1340-1360/moz. 1450-1470/gedaref
MAY	1550-1570usd/chad	1290-1320/moz. 1280-1300 tanz.white	1300-1320/moz. 1270-1300/tanz.white
JUNE	1475-1500usd/moz. 1500-1530usd/kano 1580-1610usd/maidu	1200-1230/tanz.white 1210-1240/moz. 1140-1170/conakry 1130-1150 malawi	1300-1320/tanz.white 1320-1340/malawi
JULY	1440-1470usd/kano 1430-1460usd/maidu 1440-1470usd/uganda 1400-1430usd/moz.	990-1030/moz. 990-1020/malawi	1380-1400/tanz.white 1380-1410/moz. 1400-1420/pak.hybrid 100-1320/pak.farmi
AUGUST	1650-1680usd/humera 1420-1440usd/uganda 1400-1420usd/nigeran	1070-1090/moz. 1060-1080/uganda 1380-1400/maidu	1400-1420/moz. 1400-1430pak.hybrid 1470-1490/gedaref
SEPTEMBER	1400-1420/maidu 1360-1380/moz. 1310-1340/pak.farmi 1250-1280/bauchi	1030-1050/bauchi 1230-1250/non gedaref	1490-1530/taraba
OCTOBER	1300-1320/moz. 1310-1330/bauchi 1460-1490/gedaref	1150-1190/bauchi 1130-1160/kano	1620-1650/bauchi
NOVEMBER	1260-1285/burkina 1265-1290/benue 1270-1290/uganda	1260-1290/burkina mix 1210-1240/bauchi	
DECEMBER	1320-1350/maidu 1270-1290/benue 1200-1220/ivory	1290-1310/kano 1310-1350/lafia 1370-1390/togo white	

Q&A

According to recent news, the Turkish market is another market to the EU market, and the organic market appears to be in short supply due to a lack of interest in that sector. Do you believe Turkey or any market vendor in that area carries organic hulled sesame or cleaned organic sesame?

Organic farm products mostly pulses, have already begun with considerable exports from Turkey to Europe for beans, with prices rising day by day. Nevertheless, we do not have much organic sesame seed in Turkey, as it is not a producing country of a sesame seed. There is not enough cargo available for Turkish sesame, despite our product being of good quality in the world and known as golden sesame seed in Egypt; however, organic sesame seed is hulled/shipped to Europe by some factories. Natural sesame comes from Uganda and travels from West Africa to Europe. Some come from Ethiopia, where they are attempting to grow organically for export to Europe for hulling.

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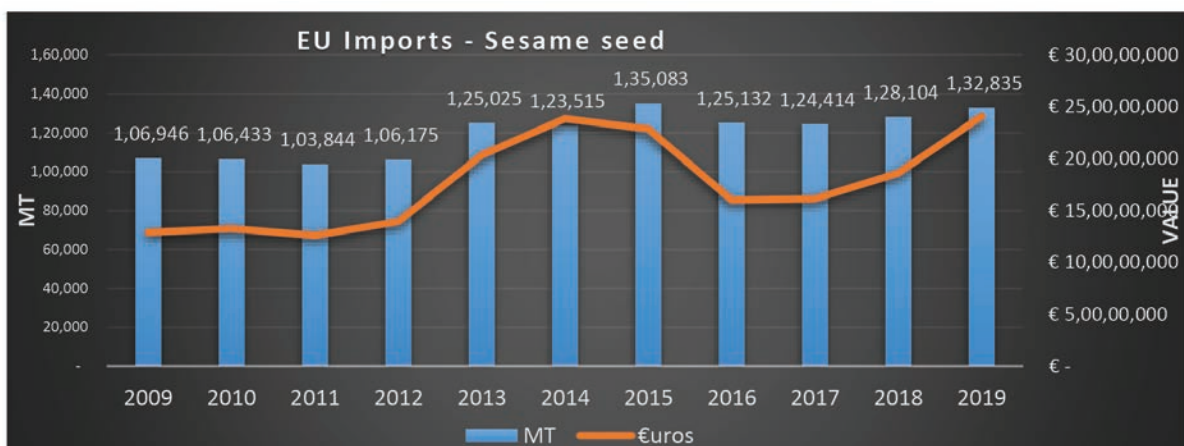


Sesame seed and the EU 2021,
Mr David Buttery, Managing
Director, Global Grains and
Ingredients LTD.



European Union sesame market trends

2020 - €214,232.000 - 129,212 metric tons



The graph above shows import values from 2009 to 2019. By 2020 the sesame import quantity is close to 130,000 tons with a value of 214.23 million euros.

European Union sesame market trends

Indicators	Import Qty to the EU/MS (Kg)	Import Qty to the EU/MS (Kg)	Import Qty to the EU/MS (Kg)	Import Qty to the EU/MS (Kg)	Import Qty to the EU/MS (Kg)	Import Qty to the EU/MS (Kg)
EU Member State(s)	EU28	EU28	EU28	EU28	EU28	EU27
Years	2015	2016	2017	2018	2019	2020
Partne						
India	62,838,000	65,687,000	65,710,000	64,523,000	63,703,000	59,180,000
Nigeria	23,449,000	19,924,000	15,604,000	18,444,000	18,858,000	14,729,000
Sudan	13,891,000	12,387,000	16,120,000	13,822,000	14,231,000	10,643,000
Turkey	611,000	321,000	622,000	2,360,000	2,034,000	7,656,000
Ethiopia	3,804,000	3,920,000	4,503,000	6,830,000	4,652,000	4,437,000
China, People's Republic of	1,123,000	1,216,000	667,000	617,000	1,226,000	4,030,000
Uganda	2,887,000	1,554,000	1,601,000	2,256,000	4,800,000	3,440,000
Mozambique	666,000	1,142,000	2,914,000	2,509,000	2,531,000	3,318,000
Guatemala	3,871,000	3,534,000	3,630,000	4,158,000	4,616,000	3,111,000
Paraguay	2,240,000	1,427,000	1,717,000	1,797,000	1,307,000	2,949,000
Mexico	1,925,000	2,738,000	2,469,000	2,960,000	1,864,000	2,285,000
Egypt	867,000	416,000	750,000	793,000	982,000	2,100,000
Brazil	35,000	367,000	201,000	0	553,000	1,859,000
Mali	1,812,000	1,093,000	1,082,000	1,040,000	1,211,000	1,655,000
Bolivia	845,000	805,000	679,000	754,000	783,000	1,278,000
Burkina Faso	2,468,000	1,580,000	541,000	752,000	2,324,000	1,106,000
Pakistan	4,196,000	2,557,000	1,765,000	1,280,000	2,710,000	768,000
Somalia	115,000	90,000	0	0	872,000	648,000
Tanzania, United Republic of	0	0	126,000	164,000	757,000	260,000
Niger	0	0	0	180,000	620,000	191,000
Sub total	127,643,000	120,758,000	120,701,000	125,239,000	130,634,000	125,643,000
Other	7,440,000	4,374,000	3,713,000	2,866,000	2,201,000	3,344,000
Total non-EU	135,083,000	125,132,000	124,414,000	128,105,000	132,835,000	128,987,000

The above table illustrates the origins of imports and their contribution to EU demand. Overall, 0.12 million tons of sesame seeds were imported into EU member states in 2020. India led the way with 0.059 million tons, followed by Turkey, China, Paraguay, and Brazil, contributing more to EU demand than EU the previous year.

Average price 2019 and 2020, by origin

Indicators	Import Qty to the EU/MS (Kg)	Import Qty to the EU/MS (Kg)	Average Price €/mt	Average Price €/mt
EU Member State(s)	EU28	EU27		
Years	2019	2020	2019	2020
Partne				
India	63,703,000	59,180,000	€ 1,873	€ 1,612
Nigeria	18,858,000	14,729,000	€ 1,644	€ 1,523
Sudan	14,231,000	10,643,000	€ 1,476	€ 1,297
Turkey	2,034,000	7,656,000	€ 2,220	€ 1,662
Ethiopia	4,652,000	4,437,000	€ 1,830	€ 1,793
China, People's Republic of	1,226,000	4,030,000	€ 2,311	€ 1,777
Uganda	4,800,000	3,440,000	€ 1,729	€ 1,792
Mozambique	2,531,000	3,318,000	€ 1,700	€ 1,569
Guatemala	4,616,000	3,111,000	€ 2,320	€ 2,026
Paraguay	1,307,000	2,949,000	€ 1,770	€ 1,408
Mexico	1,864,000	2,285,000	€ 2,405	€ 2,250
Egypt	982,000	2,100,000	€ 2,131	€ 2,185
Brazil	553,000	1,859,000	€ 1,378	€ 1,128
Mali	1,211,000	1,655,000	€ 1,051	€ 1,124
Bolivia	783,000	1,278,000	€ 2,146	€ 2,060
Burkina Faso	2,324,000	1,106,000	€ 1,609	€ 1,457
Pakistan	2,710,000	768,000	€ 1,759	€ 1,664
Somalia	872,000	648,000	€ 1,792	€ 1,436
Tanzania, United Republic of	757,000	260,000	€ 1,680	€ 1,386
Niger	620,000	191,000	€ 1,520	€ 1,488
Sub total	130,634,000	125,643,000		
Other	2,201,000	3,344,000		
Total non-EU	132,835,000	128,987,000		

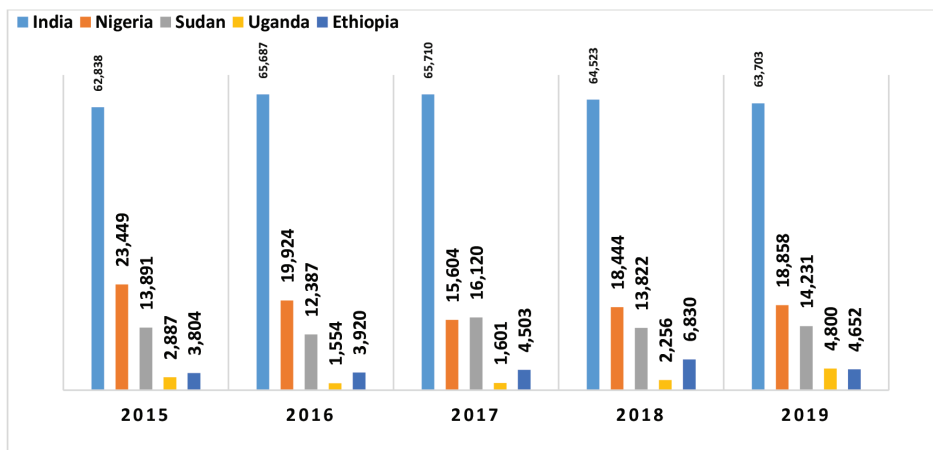
Compared to the previous year, the average price in India, Nigeria, Sudan, Turkey, Ethiopia, and China has decreased. Uganda is the only origin highlighted in green that has increased its average price.

The Top five (5) includes Turkey in 2020

The Big 5 now includes Turkey in 2020

2020 – India / Nigeria / Sudan / TURKEY (7,656mt) / Ethiopia

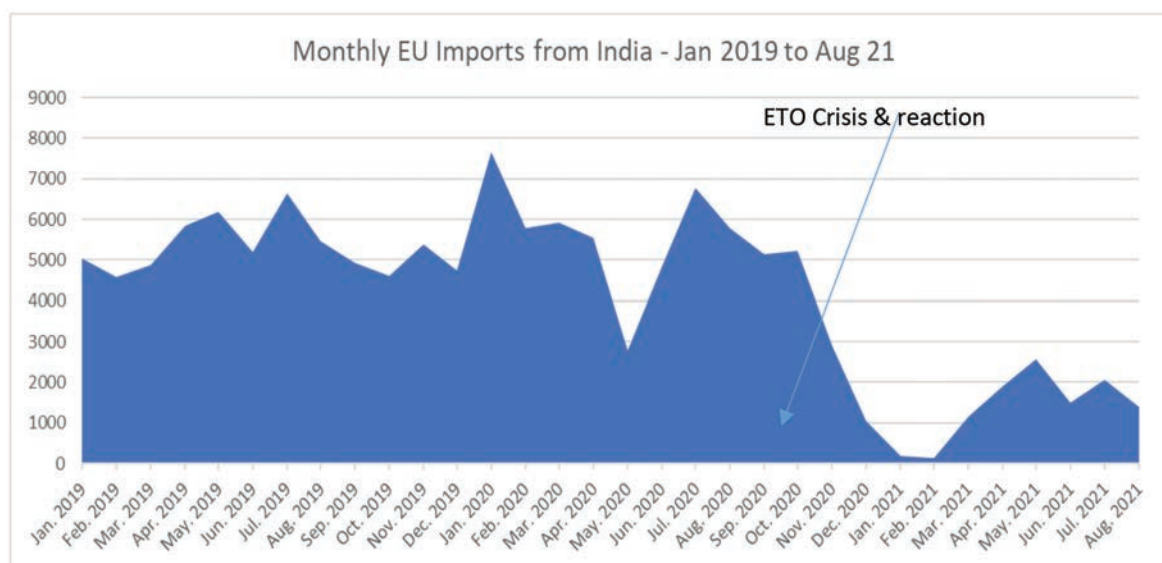
THE BIG 5 SUPPLIERS TO THE EU 28 (MT)



India is the most important supplier to the EU, as shown in the graph above. On the other hand, Turkey made it into the top five, shipping 7,567 metric tons to meet EU demand. Uganda exited the top five (5) EU suppliers in 2020.

EU IMPORTS OF SESAME SEED 2019 - BY TOP DESTINATIONS			
Destination	MT	Value	€/mt
Greece	31,300	€ 50,939,213	€ 1,627
Germany	25,576	€ 48,738,464	€ 1,906
Netherlands	22,037	€ 40,852,172	€ 1,854
Poland	11,014	€ 19,508,641	€ 1,771
Italy	7,913	€ 13,246,736	€ 1,674
France	6,933	€ 12,631,567	€ 1,822
United Kingdom	6,082	€ 13,186,901	€ 2,168
Spain	4,805	€ 8,915,619	€ 1,855
Belgium	2,524	€ 4,524,910	€ 1,793
Other 19	13,816	€ 28,146,000	€ 2,037
	132,000	€ 240,690,223	

The above table depicts the tonnages imported by dominant consuming nations inside the EU, with Greece, Germany, and the Netherlands, of course, consuming far less than 22,000 tonnes while being the largest entrance port for distribution into the EU during the year.



As a result of the EtO problem, shipping into the EU from India and imports from India have sharply decreased from the end of December to the first few months of 2021. India is making a comeback in the European Union.

Comments from the EU commission, for sharing with our sesame seed community

The Commission follows the issue of EtO closely with the competent authorities of India to discuss the action plan and the follow-up of the measures put in place by India to remedy the contamination of sesame seeds with ethylene oxide.

- India has committed to implementing all EU-mandated measures on sesame seeds and spices, fruits, and vegetables and continues to identify the source of contamination.

- India has taken satisfactory corrective actions, supported by the results of official controls on sesame seed consignments exported from India upon their entry into the EU since January 2021. But they should continue their efforts to ensure that all exports of SS are free of EtO.
- The Commission is following this issue closely with the Member States.
- It may be interesting to get more information on the origin of EtO found in different commodities, which to date was not identified.
- A next follow-up meeting with India is scheduled for November 2021.
- For more information, please visit: https://ec.europa.eu/food/safety/rasff/ethylene-oxide-incident_en

Important EU regulations - Sesame

July	2019 / 1249	Increased levels of official controls
Oct	2019/1793	Temporary increases in official controls of imports from certain 3rd countries
June	2020/749	Chlorate residues (water hulling)
Oct	2020/1540	ETO
		https://eur-lex.europa.eu/



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<https://ec.europa.eu/food/plant/pesticides/eu-pesticides-database/public/?event=homepage&language=EN>

European Union sesame market trends

In the United Kingdom, an increase in the consumption of Humus and Tahini is increasing the export potential of a sesame seed. Cross-pollination of international cuisines throughout Europe provides sesame opportunities, primarily for the bakery industry and ingredients.

Pandemic impact due to covid has affected restaurant closure, it impacted some consumption but was replaced by home baking heading forward local production and a significant rise in freight charges that are imported from China around 500 dollar/ton just in freight and imports from India about 380-400 dollar/ton impact stock levels and consumption levels among other more accessible more affordable cargo.

Future demand – EU demand is broadly stagnant, around 130,000 tons; sesame will survive a few quality scares, affecting some nations' export potential and food and marketplace to gain greater awareness. But, they are also providing opportunities where some products marketed are actively vegan or plant-based. There could be opportunities for sesame; some other industries have been actively promoting their crop to consumers (Almonds/dry fruits).

Q&A:

We have seen cases of EtO being naturally deducted,

even though there is no EtO treatment done and lab results have a 50% variation, one positive and one negative. How is the EU authority going to deal with this going forward?

Although the EU is lagging in its announcements, we have seen cases where cargo has been detected positive for cargo by an importing port.

As a result, I would strongly advise exporters suffering from an ETO positive result to mobilise trade authority and contact the EU As soon as possible if there is a suspension for food in the test result. Aside from that, the EU border has its approach, and I contact the centre directly to the case.

What are the EU's price expectations for the coming months? Is the EU content with current levels, or will a little up and downflow affect consumption and demand?

I believe every origin represented here is aware of the prices. Currently freight has a significant influence with different sources importing on CNF basis. Therefore, freight rates represent a substantial level of CNF today. Hence, an expectation of some freights equalising or returning to; we have already seeing freight reduction from December and January. This is a vital factor that will affect purchasing with freight a significant key factor.



Egypt Sesame market trends, **Mr Yasser Mohamed AbouGelail,** Quality Manager, Safe Herbs and Spices Co, Egypt

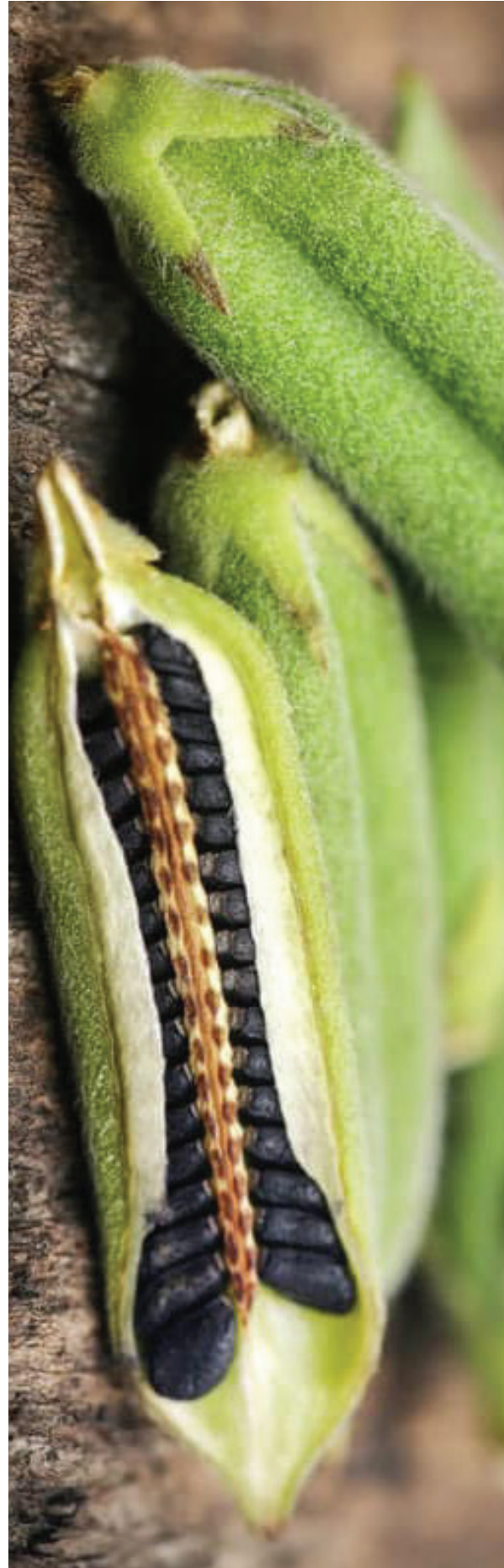
Introduction

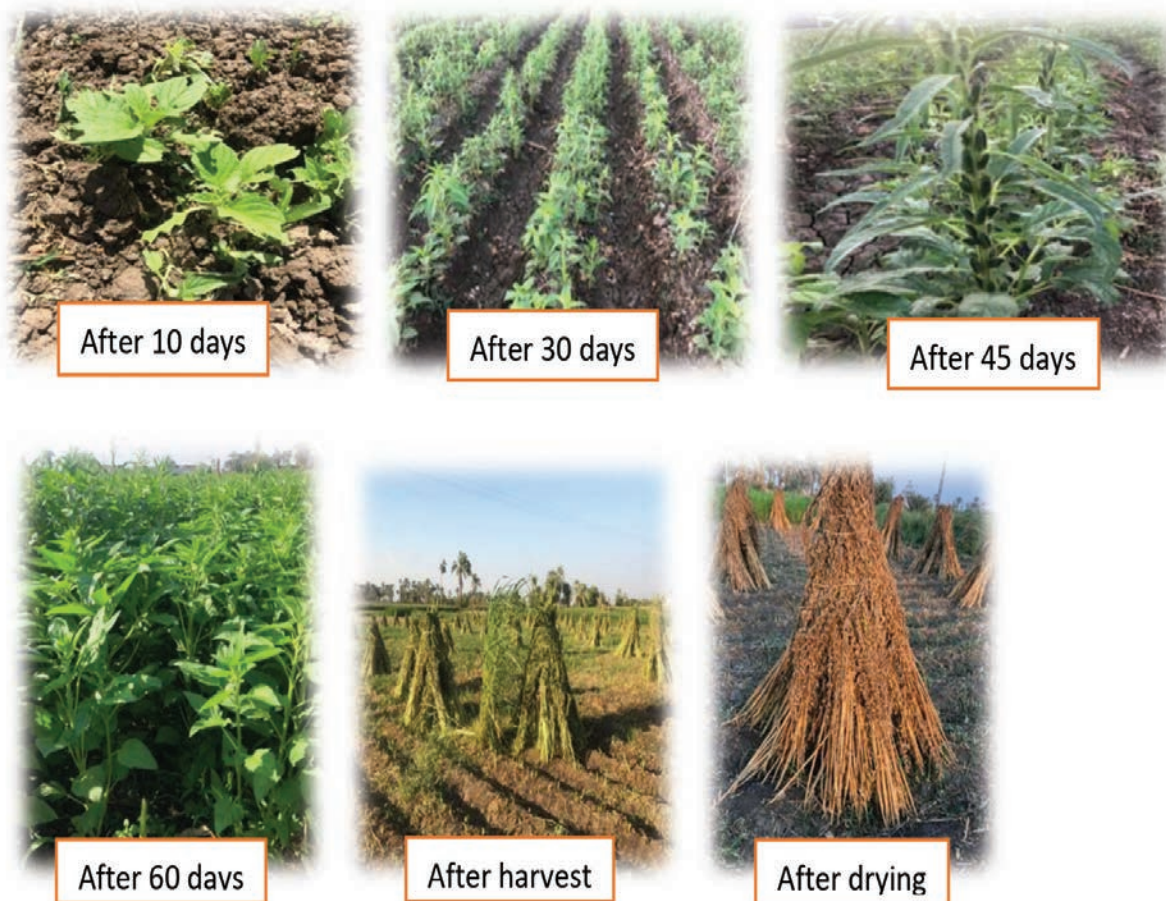
Sesamum indicum, a botanical name for the sesame oil plant, has perfect features for the climatic conditions of Egypt. The plant thrives well in dry areas with relatively small amounts of water. Hence, sesame products are essential in Egypt's cuisine. Tahina, a paste made from pure sesame, is used as a sauce in several dishes and builds the primary ingredient in typical Egyptian creations such as hummus.

Sesame is also immensely liked the sweet variation. It is said that sesame was grown in ancient Egypt. There are statements that seeds are found in the tomb of Tutankhamun (Egyptian king from 1333 to 1323 BC). Sesame has already occurred in the Greek epoch of Egypt (4th to 1st century BC). However, what is certain is that sesame was already planted in Mesopotamia around 3000 BC and has spread since then.

Egyptian sesame cultivation and types

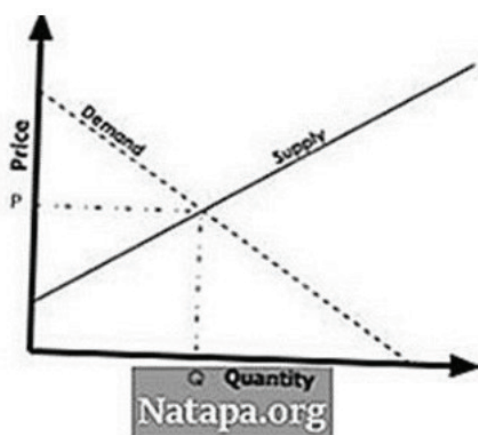
Cultivated area and weather conditions are factors that influence sesame supply. Sesame cultivation begins at the end of May and ends in September. Because of their ability to withstand adverse weather conditions and grow with minimal attention, white and brown sesame are among the most popular crops among farmers.





Factors that drive supply for sesame

Supply: Egypt has 16,500 hectares of sesame seed cultivation, increasing (Y-o-Y). Egypt has perfect weather conditions, with no adverse climatic conditions such as floods and drought-like in many other regions.



Demand: Price is the most critical factor affecting the demand in the market. When the price increase, the demand decreases as the consumer always looks for the cheapest alternative.

Quality of sesame: The consumer is always looking for good quality and encourages the purchase of high-quality products, increasing their demand.

Significant suppliers of sesame to the Egyptian market Egypt is an essential producer of sesame. Apart from their produce, Sudanese origin products are also sold in Egyptian markets because they are less expensive but lower quality than Egyptian products.

Egypt's primary sources of demand are the oil industry and the sweets, tahina, pastries, and sweet pies markets.

Why Egyptian Sesame?

- Product Quality: provide sortex quality with a purity of 99.95%.

- Oil Content: Having the highest oil percentage (40-45%) compared to other origins.
- ETO: According to Egyptian Sesame analysis reports, ETO is not detected.
- Pesticide: According to Egyptian Sesame analysis reports, pesticides are not detected in organic or conventional farming.
- Packaging: 5Kg to 700Kg Big Bags are available.
- Organic, JAS, FairTrade, and ISO certifications
- Changes in regulation for Food safety: The Egyptian Government is now stricter regarding food safety as it planned to certify all exporting companies in the food and agricultural section. All companies shall be registered in the white list, and any company out of this list won't be able to sell or export.

Shipping and logistics status

In comparison to other origins, the current shipment status is favorable.

- Shipment: Egypt to Europe (three weeks) and other European countries such as Italy (one week).
- **Prices Expectations:** Prices have remained stable as demand for Egyptian sesame has increased. Although Egyptian sesame prices are higher than those of other origins, it is less expensive when the price is compared to the quality.





Demand trends in China sesame market, **Ms Jane Zeng**, Sesame Trader, ETG Group - China.



China Sesame Consumption

Segment	Share %
Crushing	50-60%
Edible	20-30%
Paste& Others	10%

China Import & Consumption Trend

MT	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021 Est
Carry-In			16,067	11,826	13,288	10,320	25,560	66,000	1,14,080	37,000	96,000	1,05,000	1,45,000
Local Crop	3,15,000	4,50,000	2,45,000	3,31,000	2,53,000	2,15,000	1,80,000	1,52,000	1,83,000	2,50,000	3,00,000	1,50,000	90,000
Imports	3,11,281	3,90,716	3,89,319	3,95,672	4,42,290	5,68,902	8,05,926	9,33,139	7,12,925	8,27,878	8,12,387	10,16,067	10,78,826
Exports	34,214	35,384	35,478	40,110	37,350	34,517	26,825	24,014	35,253	41,679	50,163	44,175	45,000
Carryout			11,826	13,288	10,320	25,560	66,000	1,14,080	37,000	96,000	1,05,000	1,45,000	1,20,000
Total Consumption	6,60,495	8,76,100	6,74,038	7,65,320	7,35,608	8,03,179	9,72,311	10,61,072	10,08,258	10,60,557	11,53,549	11,70,242	12,38,826



PROCESSOR AND EXPORTER OF AFRICAN AGRO COMMODITIES



OPERATIONS



MOZAMBIQUE



SUDAN



TANZANIA



SENEGAL

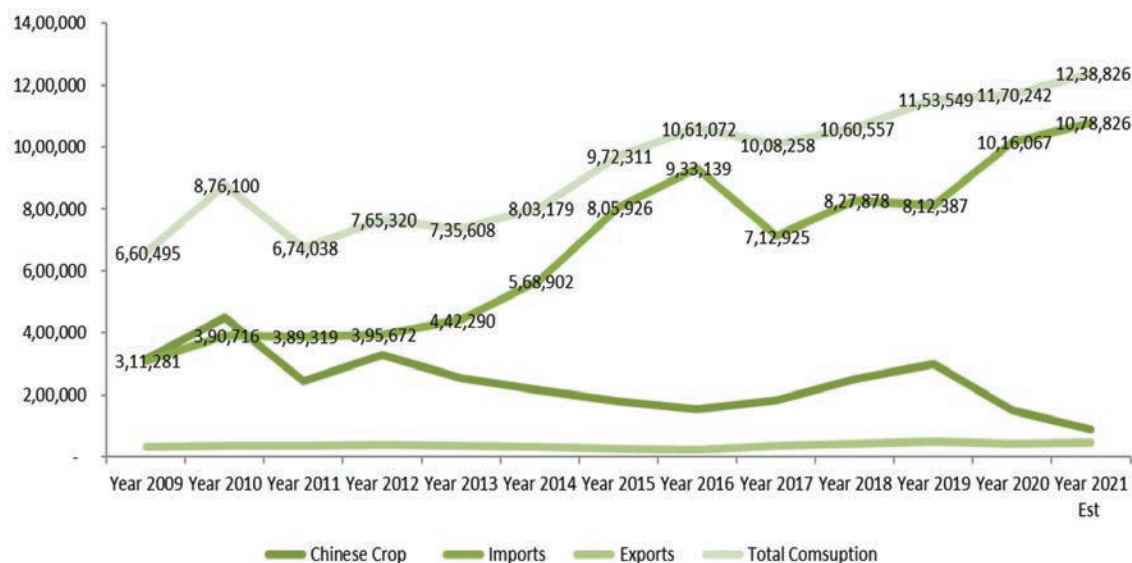


DUBAI



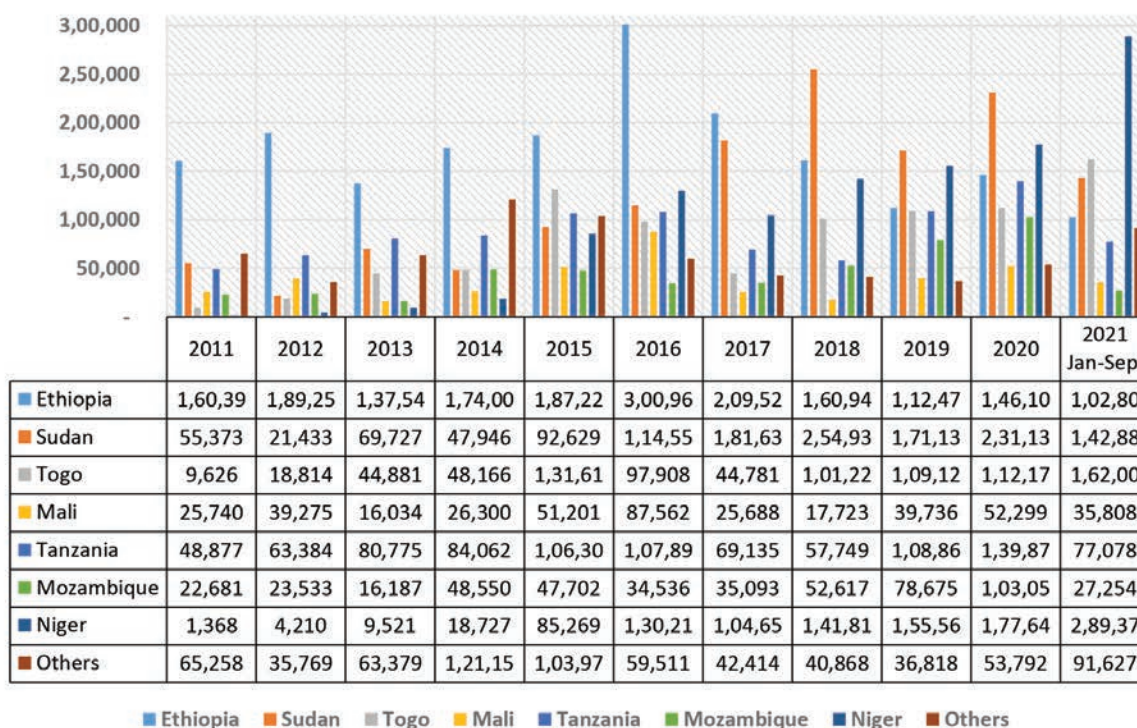
INDIA

E-mail.: sales@alfagroup.in | Web.: www.alfagroup.in | Ph. No: +971 507 403 905 | Whataap: +258 825 402 624



China's consumption trend increased from 660,495 tons in 2009 to 1,238,826 tons in 2021 (estimated). China was once an exporter, but sesame is no longer profitable agricultural crop for Chinese farmers. Ninety percent of sesame demand/consumption is based on overseas origin, primarily African origin.

Origin-Wise Import

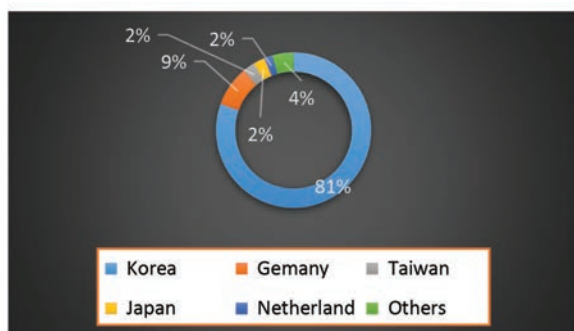


Data source – China Customs

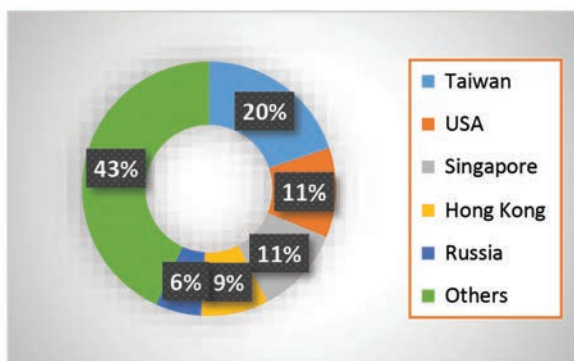
Ethiopia, Sudan, Togo, Mali, Tanzania, Mozambique, and Niger are the main contributors. Over 300,000 tonnes of Ethiopian imports were imported in 2016, and the amount of imports has been decreasing over the last few years. There was a significant contribution from West Africa during the previous year, specifically Burkina Faso, Togo, and Mali (Jan-Sept 2021). Imports were around 210,000 metric tonnes, with Niger being the top importer with 2,90,000 metric tonnes (Jan-Sept 2021)

Natural sesame and oil export

2020 Natural export	MT
Korea	35,551
Germany	3,745
Taiwan	1,090
Japan	1,085
Netherland	745
Others	1,959
Total	44,176



2020 Oil export	
Taiwan	1,374
USA	785
Singapore	776
Hong Kong	598
Russia	401
Others	2,991
Total	6,926



Data source – China Customs

China exports 40-50,000 tonnes of natural sesame to overseas markets each year. The leading destination is Korea accounting for approximately 35,551 tonnes (80 percent) of total exports in 2020, aided by the China-Korea Free Trade Agreement.

In 2020, China will export approximately 7000 tonnes of oil, equivalent to 50,000 tonnes of natural sesame. The total natural sesame export is estimated to be between 60 and 70,000 tonnes.

Tradition sesame oil market

Sesame oil is one of the most stable markets with a 3% CAGR(2014-2016) and around 450,000 MT market demand in 2018. The primary market is South and East Asia. China, Japan, Korea, Taiwan have an 85%-90% market share.

Strengths and weaknesses

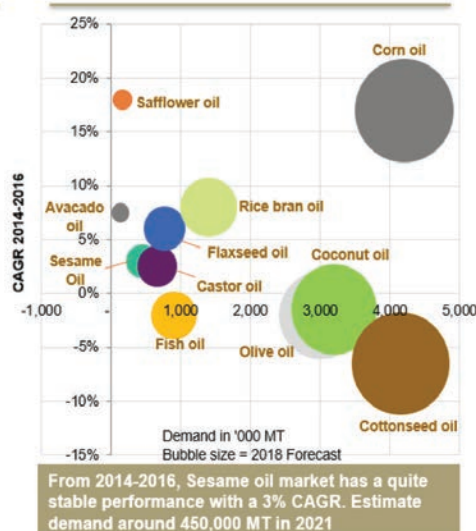
Key strength

- ✓ Steady product application demand support market size and growth
- ✓ Lack of substitute competition
- ✓ High nutritional value
- ✓ Expanded application like medical, cosmetic use

Key weaknesses

- ✗ Fluctuating raw material prices
- ✗ SND concentration in South and East Asia
- ✗ Small trading volumes

Market demand and growth matrix



Market Analysis

Top producers



Market share

Top Consumers



Market share

Data source - KPMG oil market report, sesame market size been estimated by our knowledge of the industry.

Market Outlook

- Tight supply from both overseas and local side, crop shortage been reported from nearly all sesame origins
- Stable demand/consumption considering the COVID situation under control quite well in China, but it can affect the economic activities anytime
- Global inflation of commodity price
- General supply and demand situation can result in the price volatile at a high level until Aug/Sep'2022 next season.

Market Outlook

	2017 1H	2018 1H	2019 1H	2020 1H	2021 1H		2017 2H	2018 2H	2019 2H	2020 2H	2021 2H Est
Jan Opening Stock	114,080	37,000	96,000	105,000	145,000	Jul Opening Stock	145,500	149,000	170,000	187,000	300,000
Jan-Jun arrival	422,354	545,320	471,225	485,837	680,411	Jul-Dec arrival	290,571	280,674	341,205	530,230	398,415
June Closing Stock	145,500	149,000	170,000	187,000	300,000	Dec Closing Stock	37,000	96,000	105,000	145,000	107,944
Jan-June Consumption	390,934	433,320	397,225	403,837	525,411	Jul-Dec Consumption	399,071	333,674	406,205	572,230	590,471
Monthly Consumption	65,156	72,220	66,204	67,306	87,568	Monthly Consumption	66,512	55,612	67,701	95,372	98,412

ETG World

ETG's sesame world is collected from Africa farm gate, processing in Africa, supplying to all destinations.

ETG's Sesame business today is the most diversified in geography and works for value addition across the whole supply chain.

ETG China

- In 2014, ETG established ETG(Tianjin) Food Ingredients Co., Ltd for sesame hulling.
- First factory in China to use dry hulling technology, Yearly capacity is now about 40,000 MT
- Dry-hulled sesame Seeds are now well accepted in the China market.
- Established ETG Brand name in China market.

Our Products:

Edible Sorted



Dry Hulled



Roasted Hulled



Roasted Edible



Q&A:

Could you please comment on the increase in monthly consumption, which has risen from an average of 60-65,000 tonnes to 95,000 tonnes in 2021? Is this the new norm, and do you believe the port stock, which ranges from 215,000 tonnes, is mostly unsold cargo or just sold cargo awaiting pickup?

Consumption will increase along with an increase in today's trade coupled with economic development in China. Consumption has improved in China for traditional foods, and now people have started to try innovations and explore different forms of consumption. Hence, Consumption has steadily increased to 1.3 million tons. Today's port stock is 210,000 tonnes, whether booked or not. From my perspective, it is 20-30%, which is already due. Recently, prices have been rising, a large amount of cargo was due and failed to arrive at the port, leaving some cargo undeliverable.

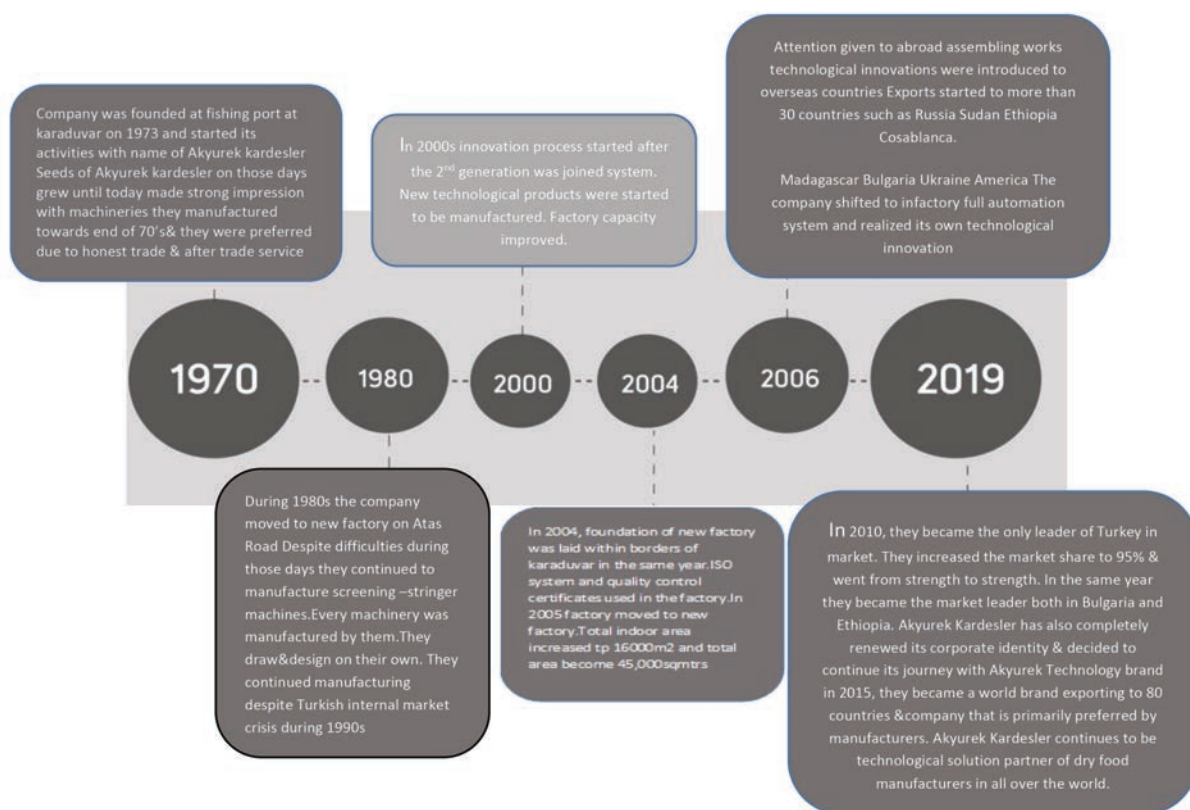




Presentation



Recent developments in sesame hulling technology,
Mr Ali Tugbay Tavukcu,
International Sales & Project
Coordinator, Akyurek Technology.



INTRODUCTION

The "Mast Qalander Group- Pakistan" Is Recognized As An Entity Of Principles, Dignity And Professionalism And Plays Strategic Role In In The Imports, Exports, International Brokerage And Intermediary In The Raw And Processed Agricultural Commodities, Also Trading Value Chain Including Origination, Processing, Branding, Merchandising And Distribution, Thereby Reaping Operational Synergies And Cost Efficiencies Transferring Final Benefit To End User

Mast Qalander Group- Pakistan Is The Prominent Exporter Of Finest & Premium Quality Agro Commodities from Pakistan. Mast Qalander Group Is Ranked Amongst The Prestigious Companies Dealing In Agro Commodities And Member Of Rice Exporters Association Of Pakistan REAP, Karachi Chamber Of Commerce And Industry, Global Pulse Confederation And An ISO 22000:2005 Certified Company Having Modern And Sophisticated Facilities As Per European Standards, Having Capacity To Produce Significant Quantities And Including Grading, Color Sortex, De-Stoning, Polishing, Sorting, Uniformity And Blending.

Oil Seeds
Pulses & Grains

**Hulled, Sortex,
Natural White,**

**Mix and Crushing
Grade Quality Sesame Seeds.**

**Origination, Processing
Branding, Merchandising
And Distribution**

**Basmati
& Non Basmati
Rice**



Mahesh Raja Manglani

Director Commercial

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Suresh Kumar Manglani

Director Imports & Indenting

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jahaanpk@gmail.com

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SYSTEM SOLUTIONS

Consultation
Pre-Engineering
Project Management
Logistics
Installation & Startups
Training
Technical Supp

PROJECT SOLUTIONS

Seed Conditioning Turn Key
Projects (Food)
Grain Seeds Cleaning Plants
Pulse Seeds Cleaning Plants
Oil Seeds Cleaning Plants
Spice Seed Cleaning Plants
Herb Cleaning Plants

Seed Milling Turn Key
Projects (Food)
Sesame Peeling Plant
Tahini Peeling Plant
Pulse Seeds Processing Plants
Sunflower Seed Hulling Plants
Peanut Shelling Plants
Pistachio Sheeling Plants

Seed Processing Turn Key
Projects (Seed)
Cereal Seed Processing Plants
Pulse Seed Processing Plants
Grass Seed Processing Plants
Oil Seed Processing Plants
Garden Seed Processing Plants

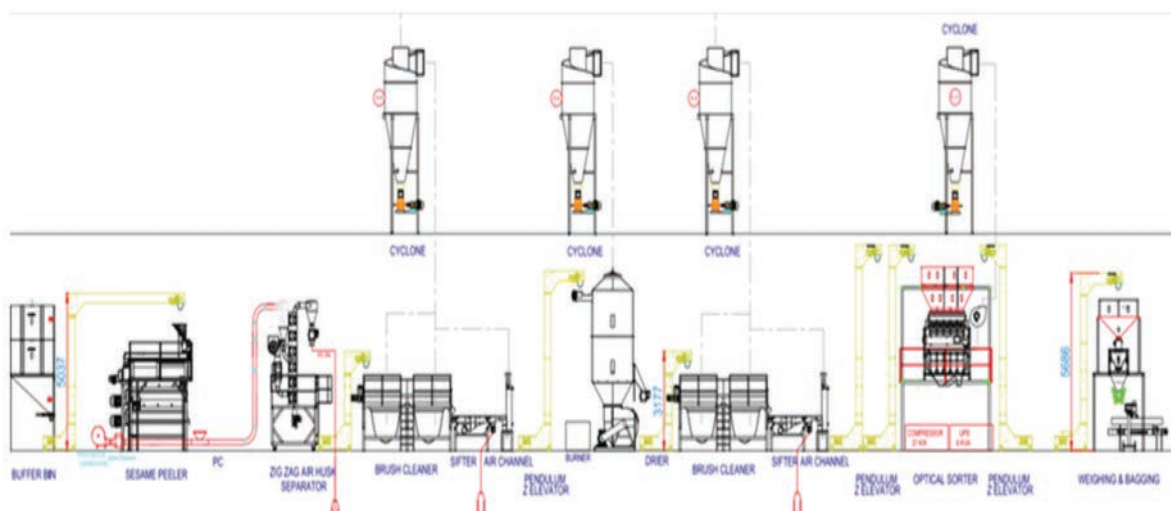
SEED SOLUTIONS

Grain	Pulse	Oil Seeds	Spices	Garden Seeds	Grass Seeds	Herbs Leaves
Wheat	Dry Peas	Sesame Seeds	Cumin	Carrot	Alfa Alfa	Basil
Barley	Beans	Sunflower Seeds	Coriander	Chervil	Clover	Dill Tops
Buckwheat	Lentil	Cottonseed	Mustard Seeds	Chieve	Cocksfoot	Chamomile
Maize	Chickpea	Flax Seed	Caraway	Cress	Meadow Grass	Marjoram
Oats	Bambara	Grape Seed	Black Pepper	Dil	Timothy	Peppermint
Rice	Dry Beans	Hazelnut	Rosemary	Leek	Peas	Chervil
Rye	Dry Broad	Pistachio	Turmeric	Lettuce	Potatoes	Parsley
Sorghum	Beans	Jobba Seeds	Clovers	Melon	Poppy	Cilantro / Coriander
Triticale	Dry Cowpea	Lin Seeds	Fennel Seed	Onion	Turnip	Mint
Others Grains	Garden Pea	Peanut Groundnut	Fenugreek Seeds	Parsley	Beetroot	
	Lupins	Pumpkin Seeds	Ginger	Parship	Cabbage	
	Pigeon Pea	Rape Seeds	Cinnamon	Radishes	Lin Seed	
	Vetch	Safflower Seeds	Cloves	Spinach	Others Grass	
	Cocoa Bean	Soybean	Ground Cumin	Tomato		
	Coffee Bean	Castor Oil Seeds	Ground Ginger	Vipers Grass		
	Others Pulse	Others Oil Seeds		Others Garden		



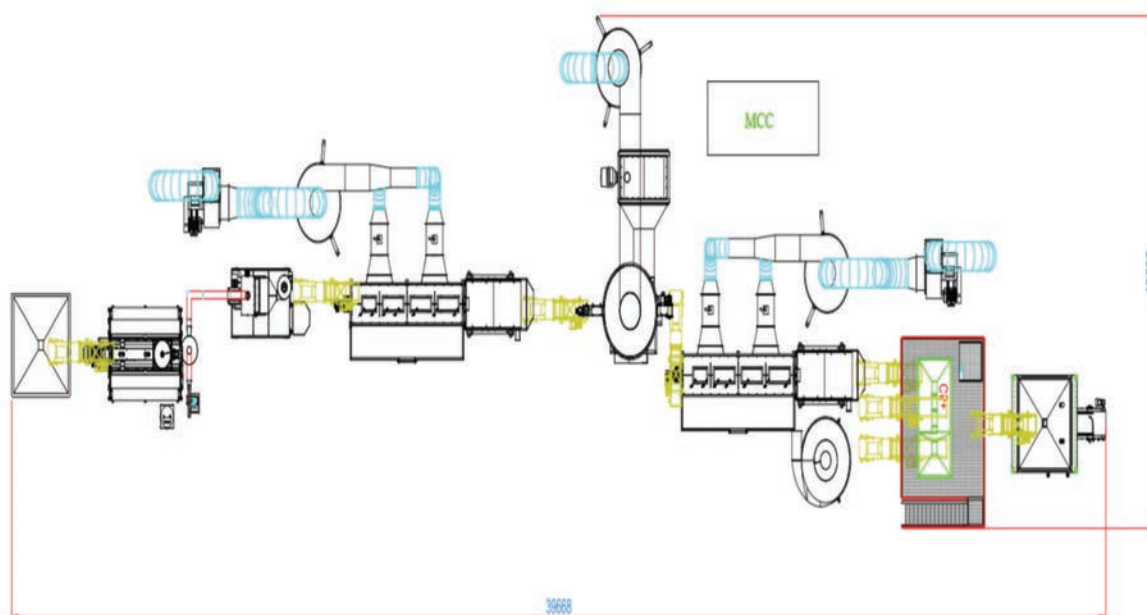


Section View & Diagram



Topview-Layout

40 x 11 Meters – H: 7 meters



SESAME PEELER

Akyurek's Sesame Peeler SP-4000 Series is a precise and efficient friction type dehulling unit that can be used for all types and sizes of sesame seed peeling. Hygienic operation that has been entirely enclosed. Reduced utility bills when compared to other traditional peeling methods.

During the sesame peeling process, no chemicals or salt are used. High-quality product that does not alter the natural properties of sesame. Innovative technology has improved peeling systems.

Three cylinders constitute the peeling system.

- The first cylinder continuously and homogeneously mixes the seeds with water for an optimum and high yield peeling process.
- The second cylinder creates friction between the seeds during the peeling process.
- The third cylinder continues the friction process using the same friction technique, resulting in an optimal and high-quality result with process repetition.

Control of input parameters is accomplished through the use of an on-board PLC panel.



ZIG-ZAG AIR HUSK SEPARATOR

Separation of Peeled Sesame and Husk

Sesame Peelers send their output to a Pneumatic Conveyor, which transports the product to the First Cyclone Feeder Hopper.

The product (husk and peeled sesame) is delivered to 6 Counter Flow Zig Zag Air Channels equipped with Heat Resistances and a 4 kW Aspirator via a Feeder Hopper Cyclone with Rotary Feeder.



DEALING IN
OIL SEEDS, PULSES & SPICES



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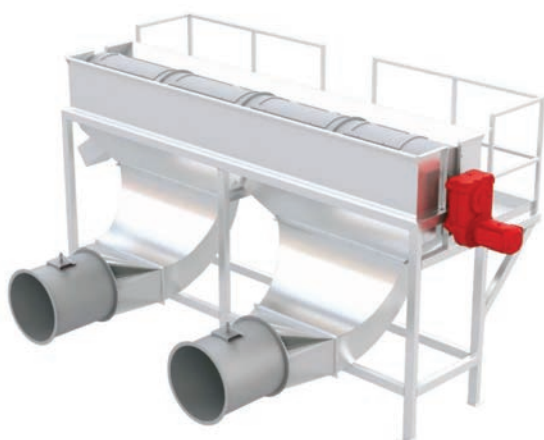
The hot air that is pushed upstream from the bottom of the Zig Zag Air Channel meets with gravity flow husk and peeled sesame, and this is where the husk is separated from the peeled sesame.



SEED BRUSH CLEANER

The Seed Brusher is intended for a variety of applications, including:

- Removal of black spots on the nose of sesame seeds continuation of the hulling process for semi-hulled sesame seeds
- In the dryer, cool the previously treated product to room temperature.
- Removal of hull that has become loose during the drying or roasting process.



VIBRATORY SIFTER SEPARATOR

The modern design of the Vibratory Sifter separator allows it to achieve high quality cleaning at required capacities, whilst having small overall dimensions and low power consumption. Choice of model allows to separate over and or undersize impurities from peeled sesame. The separator is offered with the choice of Aspiration separator systems



ASPIRATION AIR CHANNEL

Is characterized by its excellent separating efficiency, which ensures a high degree of separation: The uniform distribution of the air across the entire width of the aspiration channel and the dually adjustable wall in the vertical aspiration channel ensure stable and reliable separation.



SESAME SEED DRYER

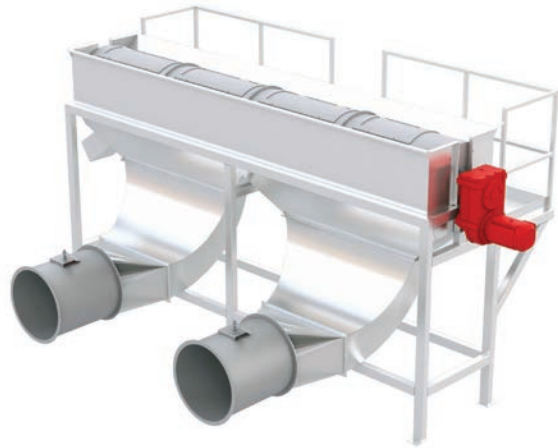
Sesame is fed to the machine by means of supplied conveyor equipment; intake of Drier equipped with a short Screw Conveyor to feed the Drying Chamber. Hot air is supplied to chamber with fan and Sesame is exposed to hot air when enters to chamber. High moistures sesame remains on lower level of Chamber and as hot air applied to Sesame, the moisture evaporates from seed and Sesame starts to get lighter. With hot air blast from beneath the chamber lighter Sesame arise to a higher level in Chamber and directed to accept outlet chute where a short screw conveyor discharges seed to next process.



SEED BRUSH CLEANER-for Cooling

Seed Brusher is designed for many application;

- *Removing the black spots of sesame seeds on the nose of the seed
- *Continue hulling process for semi hulled sesame
- *Cool down the previously treated product in the dryer to a room temperature
- *Removing hull that has loosen in the drying or roasting process.



OPTICAL COLOR SORTER

Ultimate: high resolution TRICHROMATIC FULL COLOR RGB sorter with integrated shape-sizing system.

Technological: image acquisition using HSI technology to see almost as a human eye.

Additional NIR cameras available (option)



Precise: SORTURK 'NEW GENERATION' software can recognize up to 16 families of defects. Optical resolution 0.1mm

Max Capacity: highest production capacity RGB trichromatic sorter with 1 to 10 chutes models

Flexible: Multichannel models divisible in 4 complete independent sections (4 sorters in 1)

Reliable: thanks to over 10 years' experience in electronic sorting

Unique: with airtight, conditioned and tilting optical boxes for their easy opening

NET WEIGHER & BAGGING SCALES

Akyurek Semi-Automated Net Weigher & Bagging Scale Machines are used for Pre-bagging weighing and Bagging of 5 to 50 kg bulk product.

Akyurek Semi-Automated Net Weigher & Bagging Scale machines are with electronic and micro-processing control. Feature of getting reports about sacked bags and weighing is available.

It can connect to electronic devices such as PLC or computer. Our machine can be used for all grain seeds, granule products, salt, granule chemicals, residue, provender, cement, construction chemicals, coal and stone.

Operation starts with Operator feeding the sack to sack grip, scale weighs the batch in two stages with gross weighing and net weighing and delivers the seed in to sack. This process continuous in series action.

**APPLICATION INDUSTRY:**

- Food
- Cement / Construction
- Chemistry / Petrochemistry
- Mining

Features:

- Fast and Sensitive weighing
- Programmable number of bag to fill
- Configurable Max and Min Limits
- Warning at Out of tolerance weighing
- Level Check at Top Tank
- Weighing Memory

PENDULUM BUCKET ELEVATOR

The P- EL and Z-EL elevator is suited for transportation of cereals, seeds, fertilizers, minerals, wood shavings, wood chips, granular products, and similar materials; also suitable for oleaginous seeds.

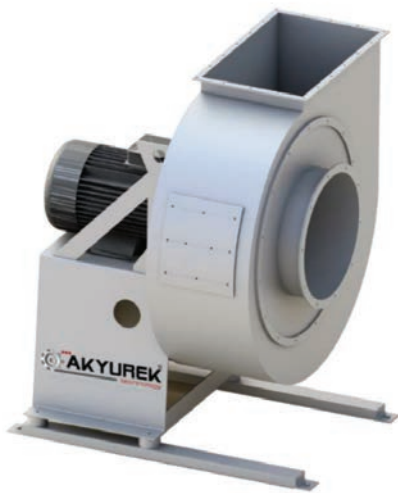
- Bucket Elevator
- Easy Dump Elevator
- Continuous Cup Bucket Elevator
- Continuous Cup Z Elevator
- Chain Conveyor
- Tripper Conveyor Belt
- Screw Conveyor
- Pendulum Bucket Z Elevator



CENTRIFUGAL FAN

The Akyurek centrifugal fan type ACF is a medium pressure fan having backward curved steel blades manufactured in steel plate. The impeller is self-cleaning and dynamically balanced. The spiral housing is made of welded steel plate.

- Centrifugal Fan
- Blower Group
- Airlock Valve
- Jet Filters
- Cyclone Akyurek
- Modular Pipework Systems

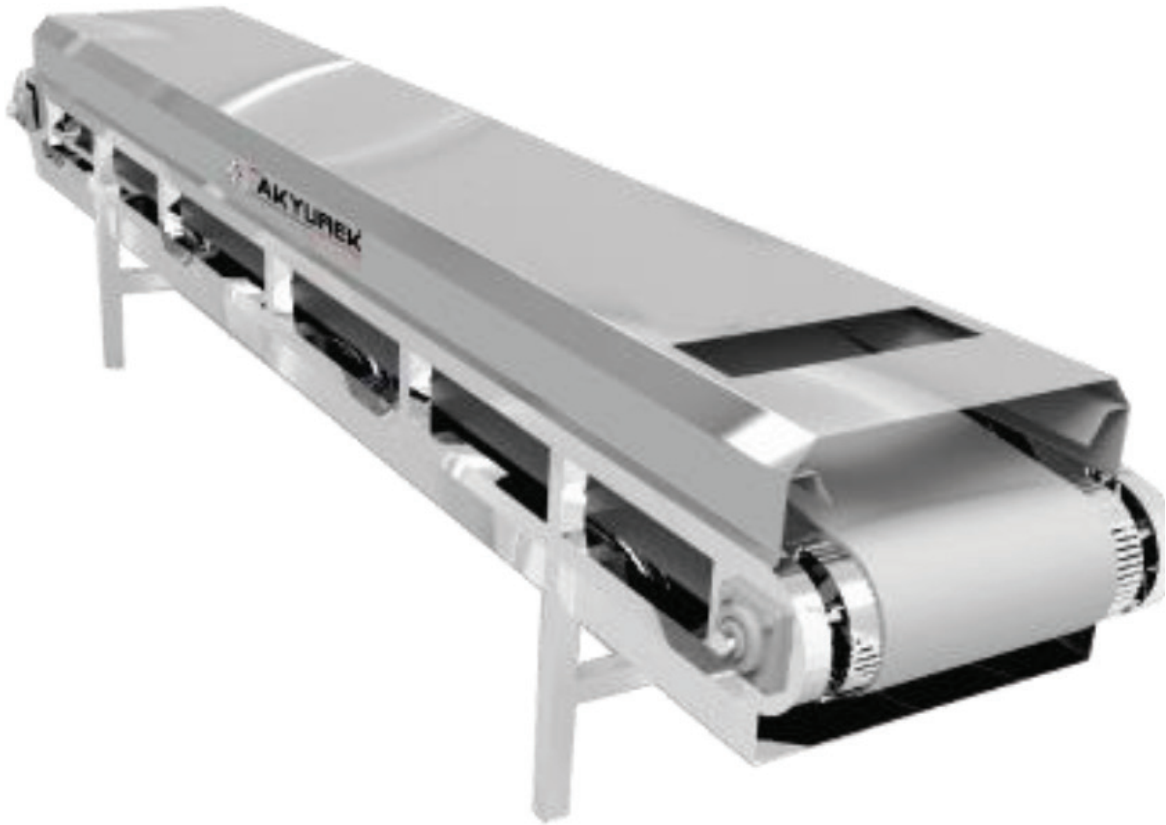


CYCLONES

Akyurek Cyclonic separation is a method of removing particulates from an air without the use of filters, through vortex separation. Rotational effects and gravity used to separate mixtures of solids from air. Akyurek designs and offers most suitable model of cyclone for your needs. As for all our products stability, Functionality, Durability, Reliability applied to our Cyclones during designing processes.

CONVEYOR BELT

Akyurek Belt conveyor type T. BELT-014 is made up of standard elements which, when correctly combined, can easily be fitted into any conveying installation. The Akyurek Belt Conveyor is manufactured in galvanized steel and or Painted and designed in a light and easy-to-assemble modular system. Type T. BELT-014 is designed with guide rollers which is quiet and have low power consumption in relation to their capacity. There is also a possibility for transport at an upward angle of up to 30° using carriers. The Belt conveyors are well-suited to safe and effective transportation of most materials.



AUTOMATION & MMC

The highest capacity of Akyurek Technology equipment is achieved by automation. As a result of many years of experience we can advise the best automation level for controlling the processes. In this respect, Akyurek Technology obvious strength is that we have gathered our knowledge of processes, systems and automation into one organization and, by choosing Akyurek Technology as an automation partner, our customers get a properly dimensioned system based on modern technology and optimized functionality. The advantages of being a turnkey partner include design and execution, as well as subsequent servicing when the need arises.



OTHER PRODUCTS

● GUM ARABIC TALHA

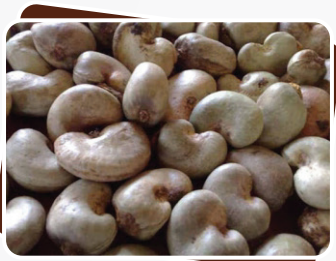
- ◆ COLOR: REDDISH BROWN
- ◆ MOISTURE: 15% MAX
- ◆ FOREIGN PARTICLE: 3% MAX
- ◆ TOTAL ASH: 4% MAX

GRADES:

- ◆ 4mm+ (PREMIUM)
- ◆ 4mm- to 2mm
- ◆ Sifting 2mm to 1.2 mm
- ◆ Dust 1.2mm-



● RAW CASHEW NUTS ORIGIN BENIN



- ◆ Outturn 48
- ◆ Count 190 Max
- ◆ Moisture 10%

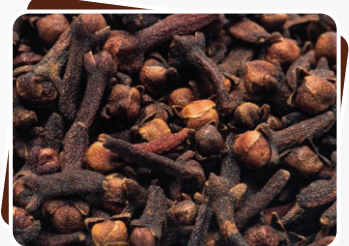
● RAWCOTTON SUDAN ORIGIN



- ◆ GRADE: 21-1
- ◆ STAPLE: 27-28 MM
- ◆ MIC.: 5.0 NCL
- ◆ STRENGTH: 27 GPT MIN.

● CLOVES

- ◆ MOISTURE 12% MAX
- ◆ STEMS 3-5%
- ◆ BABY CLOVES 2%
- ◆ HEADLESS CLOVES 3% MAX



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Q&A

What is the capacity range you provide, and what kind of power and space requirements are there, which I see as linear in terms of space?

The required space for one line is 40 meters by 10 meters in length for one ton per hour feeding line. Also, we have the option of two tons per hour. If we need to go, we have to double or triple the lines; generally, one ton per hour is sufficient.

What is the power consumption of a one-ton per hour plant?

We need 186-kilowatt power for one ton/hour simultaneously we need either LPG or fuel oil (4 litres/hour with dryer).

Based on your technology, for one ton per hour hulling, what is the average water consumption?

100 litres per hour





ECOM

ECOM is a leading global commodity merchant and sustainable supply chain management company. As an origin-integrated business operating in **35** major producing countries worldwide, ECOM focuses primarily on coffee, cotton, and cocoa.

In **2014** ECOM commenced the Edible Nuts and Ingredients Division as well as participating in selected other agricultural product markets.

Our Edible Nuts and Ingredients division is currently concentrated on **3** primary products: Sesame, Raw Cashew Nuts and Cashew Kernels. It will expand its operations into the processing of Sesame and RCN as well as expand its products range.

ECOM GLOBAL PRESENCE



**PROMOTE PROSPERITY THROUGH KNOWLEDGE,
INVESTING TO ENABLE EFFECTIVE INTEGRATION
WITH FARMS AND CONSUMERS.**



Coffee



Sesame



Cocoa



Raw Cashew Nut



Cotton



Cashew Kernels



171 YEARS
OF MARKET
EXPERIENCE

COFFEE
TOP 2 GLOBAL
MERCHANT
LEADERS

COCOA
AMONG TOP 4
GLOBAL
MERCHANTS

COTTON
AMONG TOP 5
GLOBAL
MERCHANTS

32% COFFEE
43.7% COCOA
SOLD AS
SUSTAINABLE

650,000+
FARMERS

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Mamta Commodities Pvt. Ltd.

OUR ASSOCIATE CONCERN:

Shah Ummedmal Tarachand & Bros
Mamta Trading Co. | Mihir Agro Services
Mihir Associates | Mihir Sesame Foods.



SOURCE OF
SESAME SEEDS
WORLDWIDE



Products: Sesame seeds | Sesame Oil | Peanuts | Peanut Oil | Cashew
Pistachios | Flaxseeds | Cumin | Wheat | Rice | Soybean | Green Mung beans.



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