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TW(Commodity-MIRs)/2024

Moscow, the 31st July, 2024

Subject:

#### **SESAME SEEDS MARKET INTELLIGENCE REPORT 2024**

Please find enclosed herewith Seasme Seeds Market Intelligence Report for kind perusal and further necessary action.

warm Regards,

Encl:

As above

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Minister (Trade & Investment)

The Joint Secretary (FT-II), Ministry of Commerce, Islamabad

Copy for information to:-

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#### SESAME SEEDS MARKET INTELLIGENCE REPORT 2024

#### 1.INTRODUCTION

Sesame seeds are commonly produced to get oil essentials and for use as a food ingredient. It grows in about 70 countries in the world. In Pakistan, it grows in about 65 districts as irrigated as well as a rain-fed crop. It grows in the province of Punjab, Sindh, KPK and Balochistan. Sesame is known as an oilseed crop. Owing to its high-quality oil besides, its high content of protein that is up to 22.0% it is known as one of the finest oil crops. It has oil content that ranges from 50-58%. It is a crop that is cultivated in hot, dry climates and produces oil and protein-rich seeds.

In addition to raw food purposes, sesame seeds are used in different sweets and bakery products as well. Due to its fragrant smell, it is also an essential ingredient of soaps, perfumes, vegetable oil, and carbon paper as well. It is an ancient conventional oilseed crop.

#### 2. PRODUCTION

Due to the geographical location of the regions of Russia sesame seeds are grown in Russia in very small volumes. Although recently there are plans to develop its production in the Southern regions of Russia like the Krasnodar territory, sesame seeds are supplied to Russia from different countries, depending on the season and price.

#### 3. CONSUMPTION AND IMPORT MARKET ANALYSIS

The main use of sesame seeds in Russia is in the production of food products, especially ethnic ones. At the same time, sesame is in demand in all possible forms: whole seeds, in the form of pasta (tahini), flour and oil.

Whole sesame seeds. For the use of sesame in this form the widest range of food industry directions is offered.

Bakery products. Fried sesame seeds are added to bread and breadsticks, buns and bagels, cookies and crackers, pies and waffles. The use of sesame seeds on the surface of such products is especially popular – to enrich the taste and increase the perceived value and benefits of the products.

Confectionery products- sweets, chocolate, ice cream, honey additive.

Fast and healthy food products— cereals, breakfast cereals, muesli, granola, snacks.

Ready-to-eat foods- sushi and fish dishes, baked snacks, salads, soups.

Sesame paste (tahini). Pasta is made from raw sesame seeds; it is rich in protein, but contains less fat than fried seeds, and is a good source of omega-3 and omega-6 fatty acids. Tahini can be stored in the refrigerator for months.

Hummus, combined with chickpeas. Sweets and halva, usually about 50% tahini combined with boiled and whipped sugar and other ingredients.

Sauces for meat and vegetable dishes.

Sesame flour and meal. Flour is obtained as a result of conventional grinding and is a creamy light brown powder. The meal is a residual product after oil extraction and is characterized by a high level of protein (from 34% to 50%) and oil itself (from 10% to 12%). In addition, the antioxidants sesamoline and sesamol contained in sesame seeds increase the shelf life of other foods made from flour or meal.

Healthy food products— pastries, chips. Often such products are prepared with the addition of other types of flour, which does not in the least interfere with the nutritional balance of healthy ingredients.

Pet food. The high protein content makes sesame meal feeds especially valuable for poultry and livestock. Therefore, the demand for such feeds is significantly increasing in poultry and livestock farming around the world.

Sesame oil. Sesame is a very favorable crop for making oil due to its naturally high fat content. And the presence of antioxidants significantly increases its shelf life, which is especially welcome in hot countries of the world. That is, sesame oil acts as a natural preservative for many products, but it is recommended to store it in the refrigerator.

Sesame consumption is gaining momentum, and this dynamic will not slow down. As a result of the steady trend towards a healthy lifestyle, consumption patterns are changing: people carefully study the ingredient composition of food and welcome innovations in the food industry and a wider offer of ready-to-eat dishes. Another growth driver is the increased demand for sesame in animal feed. It is obvious that the global and Russian sesame seeds market will expand significantly in the foreseeable future.

#### 4. SPECIFIC QUALITY/ PACKAGING LABELLING REQUIREMENTS

The quality and packaging requirements are described in the GOST (Country System of Standards) 12095-76.

https://docs.cntd.ru/document/1200024534

#### 5. TECHNICAL FOOD SAFETY STANDARDS

The Russian import SPS requirements are set by two federal agencies: Rosselkhoznadzor(Federal Service for Veterinary and Phytosanitary Surveillance) and Rospotrebnadzor (Federal Service for Surveillance on Consumer Rights Protection and Human Wellbeing). However, over the past years, Russia has engaged into harmonizing its Sanitary and Phytosanitary norms with Kazakhstan, Belarus, Armenia and Kyrgyzstan within the framework of Eurasian Economic Union.

Some products are included in the joint list of products subject to sanitary and epidemiological supervision at the customs border and in the customs territory

of the EAEU. The union has published Uniform Sanitary Epidemiological and Hygienic Requirements for all products included in the above-mentioned list on the official website of the Eurasian Commission.

Furthermore, some products are included in the list of products subject to phytosanitary control. Technical regulations and requirements associated with manufacturing, storage, transportation, marketing and disposal processes are listed in the Decision of the EAEU on Technical regulation on foodstuff safety.

The above-mentioned regulations are available by the following link – <a href="https://eec.eaeunion.org/en/comission/department/depsanmer/regulation/sanit">https://eec.eaeunion.org/en/comission/department/depsanmer/regulation/sanit</a> arnyemery.php?ysclid=ltfi8hl2nh364545302

#### 6.IMPORT TARIFF

The current common customs tariff of the Eurasian Union is based on the Harmonized Commodity Description and Coding System of the World Customs Organization. The Official Unified Customs Tariff is available on the official website of the Eurasian Economic Commission.

Foreign Economic Activity Commodity Nomenclature and Common Customs Tariff of the Eurasian Economic Union

The custom tariffs of the sesame seedsexports of Pakistan to Russia are available in the table below:

HS Code	Description	The rate of the import customs duty/preferences (in percentage of customs cost either in euro or in US dollars)
'120740	Sesame seeds	Duty -0%, VAT 10% - for use for food and feed purposes, VAT 20% - other

According to the Union's Generalized System of Preferences, goods originating from developing and least developed countries may be eligible for certain tariff preferences granted from the member-states. Least developed countries are given the opportunity to fully eliminate the customs duties for specific set of products. The list of developing beneficiary countries, which encompasses Pakistan, states a possible tariff reduction of 25% from the applied MFN duties. The EEC has issued the list of goods originating in developing or least developed countries eligible for tariff preferences during their importation to the customs territory of the EAEU.

List of goods originating in developing or least developed countries eligible for tariff preferences during their importation to the customs territory of the EAEU

The rules of origin that are applied for the purpose of acquiring the abovementioned tariff preferences are also accessible on the official website of the EEC.

Rules of origin for developing and least developed countries regarding eligibility to obtain tariff preferences

<u>List of Developing Countries and Least-developed beneficiary countries - (GSP)</u>

Regulation on the Terms and Procedure for the Application of the Eurasian Economic Union's Common System of Tariff Preferences

#### 7.NON-TARIFF BARRIERS

#### Legislation basis

The legal basis of the Eurasian Economic Union includes article 6, point 1 which defines that the legal system of the Union is composed of international agreements within the Union (e.g. Customs code of EAEU1), international agreements of the Union with the third parties (e.g. Free Trade Agreement between the Eurasian Economic Union and Vietnam2) and decisions of the Supreme

Eurasian Economic Council, Eurasian Intergovernmental Council and Eurasian Economic Commission (e.g. Decision of the Board of the Eurasian Economic Commission of April 21, 2015 No. 30 "About non-tariff regulating measures"). Agreement on EAEU contains some basics of NTM application. Generally non-tariff measures that are introduced within EAEU legislation are common among all EAEU members. However, there may be specifics of NTM implementation only in case of imports to one of the member-state. All in all, the following provisions of the Agreement on EAEU cover the issues of adoption of NTMs: Article 44 and Annex 6 (Article III), Article 46 and Annex 7, Articles 48–50 and Annex 8, Articles 51–55 and Annex 9, Articles 56–59 and Annex 12.

In short, adoption and implementation of NTMs goes as follows: each member of the Union introduces NTMs either by national or supranational legislation. Thus, NTMs may be implemented in the following ways:

- 1. Measure is implemented by national legislation only.
- 2. Measure is implemented only by the EAEU legislation (e.g. measures from EAEU technical regulations).
- 3. Measure is implemented both by EAEU and national legislation (e.g. measures on tariff-rate quotas (TRQs).

About 96% of EAEU measures are technical measures applied to imports, in other words TBT and SPS NTMs. Among them most popular measures include labelling requirements, quality requirements and requirements in the sphere of conformity assessment.

Other agreements forming the <u>regulatory framework</u> of non-tariff measures applies by the EAEU can be found on the official website of the EAEU.

#### Import Licensing

The above-mentioned EAEU legislation on non-tariff measures serves as the legal basis for the import licensing system. The licensing measures are realized with the purpose of controlling and monitoring imports and exports of goods belonging to the "sensitive" classification of the EAEU member states or the international community. Import/export licenses are implemented in the following cases:

- → In the event of temporary quantitative restrictions on imports of certain types of goods
- → To regulate the importation of certain goods for reasons of national security, health, safety or environmental protection;
- → To grant an exclusive right to import or export certain goods
- → To carry out international obligations.

The Eurasian Economic (EEC) Board has stipulated a list of goods, the import of which is prohibited or restricted in the territory of the EAEU.

## Single list of goods subject to prohibitions or restrictions on import or export by the Customs Union member states

The goods, import of which is restricted, are subject to import licensing. (e.g., fertilizers; rare animals and plants; goods with a high level of cryptographic protection, hazardous waste, drugs, items of cultural value, precious stones and metals, etc.).

In the Russian Federation, the licenses are acquired from the Ministry of Industry and Trade in accordance with the unified licensing rules of the EAEU. A Russian licensee may import licensed goods into Russia only and has the right to transit such goods through the territory of the other EAEU member states.

#### Management of quotas

Goods that might be a subject of quantitative restrictions on exports are included in the list of goods that are essential for the domestic market of the EAEU. In exceptional cases EEC may impose temporary prohibitions or quantitative restrictions on export. While imposing prohibition or quantitative restrictions on the export of agricultural products, the Commission takes into account the impact of those restrictions on food supply security of the third countries (those with import share of over 5%). The Commission distributes volumes of export and (or) import quotas between member States and determines the way of distribution of shares of export and (or) import quotas among the participants of foreign trade activity of the member States, as well as the volumes of import quotas between third countries. Distribution of import quotas between third countries is executed by the Commission on the basis of consultations with all significant suppliers from third countries(suppliers with over 5% import share). If the distribution of import quotas cannot be executed based on consultations with all significant suppliers from third countries, the decision is taken by the Commission based on the volume of deliveries of goods from these countries during the preceding period (mainly 3-year period).

#### Rules of origin

The origin of goods imported into the customs territory of the Union has to be proved by a declaration of origin or under the decision of a declarant by a certificate of origin. Information regarding the origin criteria, correct documentary proof of origin and requirements for the certificates of origin is available in the official EEC document containing the Non-preferential rules of origin of goods imported into the EAEU. Further information on the non-tariff regulations of EAEU can be found on the official website of the Eurasian Economic Commission.

#### 8.IMPORT VALUE AND VOLUME (LAST 5 YEARS)

## Russian Imports of Sesame Seeds (HS Groups '120740 Sesamum seeds, whether or not broken), US\$ million

N	Exporters	2019	2020	2021	2022	2023	% Change, 2023/2022	% Share
	Total	28,205	21,815	27,944	28,623	35,540	24,2	
1	India	27,592	21,402	27,163	27,976	34,521	23,4	97,1
2	Türkiye	1	2	43	454	656	44,5	1,8
3	Guatemala	0	0	342	0	122	-	0,34
4	Mozambique	0	0	0	0	77		0,22
5	Pakistan	0	74	0	0	65	( )	0,18
6	Austria	0	20	30	54	58	7,4	0,16
7	Tunisia	0	0	0	47	21	-55,3	0,059
8	China	341	0	0	8	8	0	0,023
9	Israel	0	0	4	0	5	-	0,014
10	Lithuania i	5	0	66	0	2	-	0,0056

Source: ITC, Mirror Data

According to ITC Mirror statistics the main suppliers of sesame seeds to Russia in 2023 are India, Türkiye, Guatemala, Mozambique. Pakistan took the 5th place with a 0,18% share of the market. However, India possesses the lion's share with 97%, thus being the single largest exporter.

#### 9. DISTRIBUTION CHANNELS

Most important distribution channels of sesame seeds in Russia are distributors and processing factories which use it as a raw material. The list of the corresponding buyers is given in the last chapter.

#### 10. WHOSALE AND RETAIL PRICES

#### Wholesale Prices:

<u>Conventional Sesame Seeds</u>: The average wholesale price of conventional sesame seeds in Russia is approximately USD 2.61 per kilogram. This price can fluctuate based on factors such as quality, origin and market demand.

Organic Sesame Seeds: Organic sesame seeds typically command higher prices due to their cultivation methods and certification requirements, generally ranging from USD 3.00 to USD 3.50 per kilogram.

<u>Processed Sesame Seeds</u>: Prices for processed forms such as hulled or toasted sesame seeds can range between USD 3.00 and USD 4.00 per kilogram, reflecting the added value from processing.

#### Retail Prices:

Packaged Whole Sesame Seeds: The retail price range for sesame seeds in Russia varies between USD 5.18 and USD 6.94 per kilogram (RUB 456.84 and RUB 610.72 per kilogram). This price range reflects different packaging sizes, quality, and whether the seeds are organic or conventional.

Sesame Oil: The retail price for sesame oil is significantly higher, ranging from USD 5.74 to USD 22.28 per kilogram (RUB 505.12 to RUB 1,960.64 per kilogram). The variation in price is due to factors such as the type of oil (refined or unrefined), packaging, and brand reputation.

Sesame Paste (Tahini): Retail prices for tahini in Russia typically range from USD 10 to USD 15 per kilogram(RUB 880.0 to RUB 1,320.00 per kilogram), depending on the quality and whether the product is organic. Tahini is valued for its nutritional benefits and versatility in culinary uses.

#### Price Trends and Volatility:

Sesame seed prices are subject to fluctuations due to various factors including weather conditions, crop yields, and market demand. The global sesame seed market size was USD 7.4 billion in 2023 and is projected to reach USD 9 billion by 2032, growing at a CAGR of 2.2%.

Sources: Tridge, Selina Wamucii, Global Market Forecast

# 11. EXPORTS OF THE PRODUCT FROM PAKISTAN TO HOST COUNTRY AND COMPARISON WITH COMPETITORS IN THE MARKET

Pakistan's Exports of Sesame Seeds to World and Russia FY 2019-2024, (HS Groups '12074000 - Sesamum seeds, whether or not broken)

Pak Exports to the World							
FY 2019-20	FY 2020-21	FY 2021-22 FY 2022-23		FY 2023-24			
30.23	95.61	193.46	151.11	410.01			

Pak Exports to Russia							
FY 2019-20	FY 2020-21	FY 2021-22	FY 2022-23	FY 2023-24			
-	0.07	-	0.08	×=.			

Source: Mac Map (ITC)

The tables indicate the annual export values of Pakistani sesame seeds, highlighting a significant increase in exports to the world in FY 2023-24 compared to previous years. The major export destination is China. This export trend has given boost to enhanced cultivation and production of sesame seeds in Pakistan. It is expected that, given the growth in export, the crop area and production are likely to increase in coming years that necessitates to broaden the base of its export and to explore new markets. Pakistani exports of sesame seeds to Russia are minimal at the moment. The figures itself reflect existing opportunities and the potential for future expansion in this market.

#### 12. REASONS OF PAKISTAN'S LOW/HIGH SHARE

Pakistan's low / high share in the sesame seed export market, particularly to Russia, can be attributed to several factors:

#### Low Share Factors:

<u>Intense Competition:</u> Countries like India and Turkey have a well-established presence in the Russian market since many decades. These countries benefit from strong trade relations, consistent supply chains and effective marketing strategies which currently give them a competitive edge over newer entrants like Pakistan. At present, India is the single largest supplier of the product with almost the entire share of the import market.

<u>Limited Export Promotion:</u> There is room for improvement in promoting Pakistani sesame seeds in international markets, including Russia. Enhancing marketing efforts and creating greater awareness can help boost demand for Pakistani products.

<u>Emerging Market:</u> The Russian market, though not very big in size considering the volume of imports at around US \$ 30 million, is relatively new for Pakistani sesame seed exporters, providing significant growth opportunities as relationships and market presence are further developed.

#### High Share Factors:

<u>Favorable climatic conditions</u> leading to good harvests, successful compliance with international quality standards, and competitive pricing strategies contribute to higher market shares when achieved.

Pakistani sesame seeds are often <u>priced competitively</u> compared to other exporting countries. This can make them more attractive to buyers, especially in price-sensitive markets. Recent example is handsome surge in exports to China.

Pakistani sesame seeds are <u>rich in oil content and protein</u>, making them highly desirable for both culinary and industrial uses. Highlighting these nutritional benefits can boost demand.

Initiatives by the Pakistani government to support agriculture, including subsidies for inputs like seeds and fertilizers can enhance production efficiency and output quality.

#### 13. POTENTIAL:

As mentioned earlier, Russia does not import huge volumes of seeds. The average import volumes of US \$ 30 million in the total potential of the market out of which Pakistan can strive to gain at least 5% share to start with and with effective marketing and promotional strategies, can gradually increase its share. For this, it is imperative to ascertain the market price of Indian seeds. The authentic comparative figures of Indian export price are not available at the moment due to suspension of publication of import / export data by the Russian authorities since start of Special Military operations in February, 2022. However, some reliable industry source have put the CIF price of Indian sesame seeds white peeled purity 99.95 – 99.98%) in a range of US \$ 2210-2250 per ton. The price slightly drops when there is a new harvest / produce in the market.

#### 14. RECOMMENDATIONS

To increase Pakistan's share in the global sesame seed market, the following recommendations are made:

- a. Develop stronger trade relations with key importing countries like Russia. This can involve participating in trade fairs, establishing trade offices, and engaging in bilateral negotiations to reduce non-tariff barriers.
- b. Develop robust marketing strategies to promote Pakistani sesame seeds.

  Creating a strong brand identity, highlighting the unique qualities of

- Pakistani sesame seeds, and leveraging digital marketing platforms can help increase visibility and demand.
- c. Actively participate in international exhibitions, trade shows, and food expos to showcase Pakistani sesame seeds. This will help in creating greater awareness, establishing connections with potential buyers, and understanding the competitive landscape.
- d. Organize and participate in trade missions and delegations to Russia. These missions can help establish direct contact with potential buyers, government officials, and industry leaders, fostering better business relationships and opening new opportunities for export growth.
- e. Implementing these strategies can help Pakistan to increase its share in the sesame seed market, ensuring sustainable growth and competitiveness.

## 15. LIST OF SESAME SEEDS IMPORTERS IN HOST COUNTRY (ADDRESS PHONE NUMBER, EMAIL)

№	Company name	Region	Legal address	Phone numbers	E-mail
1	LLC "Ferment- Omsk"	Omsk Region	55/57 Gertsena Str., Omsk, Omsk region 644007, Russia	+7 (38-12) 37-02-20 +7 (38-12) 37-02-21 +7 (38-12) 37-79-61 +7 (913) 620-80-53 +7 (38-12) 37-02-37	fermentomsk@ukomilk.ru fermentomsk@mail.ru ukomilk@yndex.ru office@ukomilk.ru ukomilk@yandex.ru
2	LLC "Mezhregionag rokhim"	Volgograd Region	10 immarshalaTo lbukhina Str., Volgograd, Volgograd region 400075, Russia	+7 (844) 254-57-85 +7 (844) 254-57-87 +7 (844) 258-30-21 +7 (844) 258-30-56 +7 (84-42) 35-12-76	info@mragrochim.ru mrgagrohim@sprint-v.com.ru perova-ea@mragrochim.ru
3	LLC "SAATBAU RUS"	Krasnodar Territory	5 Zipovskaya Str., Krasnodar, Krasnodar Territory 350010, Russia	+7 (861) 278-23-42 +7 (861) 278-22-53 +7 (988) 368-00-48	office@saatbaulinz.ru teslenko.konstantin@saatbau.c om

4	LLC "RosAgroTreyd"	Krasnodar Territory	5litE Zipovskaya Str., Krasnodar, Krasnodar Territory 350000, Russia	+7 (861) 278-23-31 +7 (861) 278-22-41 +7 (861) 278-22-42 +7 (861) 278-23-26 +7 (929) 844-97-77	rosagrotrade@mail.ru 2782242@mail.ru tsimbal.av@rosagrotrade.info rosagrotrad@mail.ru
5	CJSC "Zalesskoyemol oko"	Kaliningrad Region	22 Bolshakovska ya Str., Zalesye settlement, Polessk district, Kaliningrad region 238642, Russia	+7 (401-58) 2-31-24 +7 (401-58) 2-57-75 +7 (921) 712-24-97	3907027899_390601001@eo.t ensor.ru zalesskoemoloko@yandex.ru zbuh@zalesskoemoloko.ru
6	LLC "EkoNiva- Semena"	Voronezh Region	33 Sovetskaya Str., Shchuchye village, Liski district, Voronezh region 397926, Russia	+7 (47-32) 53-63-88 +7 (920) 220-20-32 +7 (920) 726-32-48 +7 (930) 037-30-05 +7 (917) 284-54-79	aleksandr.novoselov@ekoniva- apk.com samoilikrn@rambler.ru
7	JOINT-STOCK COMPANY "AGROPROD UKT"	Kaliningrad Region	65 Gagarina Str., Svetly, Kaliningrad region 238340, Russia	+7 (40-12) 30-55-03 +7 (40-12) 30-55-44	e.kurbatova@sodru.com e.badulina@sodru.com info@sodru.com
8	LLC "Protein Plus"	Saint Petersburg	54litA 5 V.O. Line, Saint Petersburg 199004, Russia	+7 (812) 327-46-60 +7 (812) 327-80-34	protein@peterstar.ru
9	LLC "Olimp- Taganrog"	Rostov Region	Dzerzhinskog o Str., Taganrog, Rostov region 347905, Russia	+7 (86-34) 62-55-68 +7 (863-46) 2-55-68 +7 (863-46) 2-55-97 +7 (928) 213-03-89 +7 (938) 103-30-20	olimp-taganrog@bk.ru batichko@list.ru fornewlife2011@yandex.ru
10	LLC "GSA Agro"	Lipetsk Region	5B Ozernaya Str., Otskochnoye village, Hlevnoe district, Lipetsk region 399251, Russia	+7 (4742) 200 633	gennady.eryomin@german- seed-alliance.ru

11	LLC "BLEK SI INVEST AGRO"	Krasnodar Territory	41litA Odesskaya Str., Krasnodar, Krasnodar Territory 350020, Russia	+7 (928) 468-79-81 +7 (928) 038-18-40	evzhik07@mail.ru
12	LLC "AGRO"	Krasnodar Territory	Revolyutsionn aya Str., Dinskayacossa ck village, Dinskaya district, Krasnodar Territory 353204, Russia	+7 (861-62) 5-45-60	gutenagro@gutenagro.ru abakumova@gutenagro.ru
13	LLC "RANDAR"	Rostov Region	80 Budennovsky Ave, Rostov- on-Don, Rostov region 344011, Russia	+7 (918) 572-55-44 +7 (938) 135-73-98	buh@randar.ru
14	LLC "FTS"	Rostov Region	47 Nizhnebulvarn aya Str., Rostov-on- Don, Rostov region 344022, Russia	+7 (928) 622-62-85	vp.07@bk.ru
15	LLC "SEMENA KURSKIYE"	Kursk Region	37 VerkhnyayaL ugovaya Str., Kursk, Kursk region 305001, Russia	8(4712) 54-84-10 8(903) 877-88-80	semenakurskie@yandex.ru http://kurskie-semena.ru/for- foreign-partners.html
16	LLC "FERMER- AGRO"	Rostov Region	Pridorozhnaya Str., Matveyev Kurgan settlement, Matveev Kurgan district, Rostov region 346970, Russia	+7 (903) 439-05-00 +7 (918) 884-42-41	litvinova1205@gmail.com