

Sesame Global Intelligence Report — Master Table of Contents

ENHANCED EDITION

MARCH 2026

138 PAGES

9 DOCUMENTS

34,600+ TRADE RECORDS

SESAME GLOBAL INTELLIGENCE REPORT — Enhanced Edition | March 2026

Prepared by Mukul Gupta (Shakumbhri Expo Impo Ltd) in collaboration with Sesameinfo.in

How To Read This Report

This intelligence suite comprises 9 standalone documents. Each chapter can be read independently, but for maximum value, follow the reading path matched to your role:

Reader Profile	Read This First	Then Go To
C-Suite / Senior Leadership	Global Executive Brief (13 pages, 2 min read)	Strategic Synthesis — Final Verdict (p.21)
Procurement Head	Global Executive Brief → Monday Morning Action Table (Synthesis p.15)	Your market chapter(s) → Section 6 of each
Origin Exporter	Strategic Synthesis → Origin Strategic Matrix (p.11)	Your destination market chapter(s)
Trader / Analyst	Start anywhere — full dataset in each chapter	Price Intelligence Matrix (Synthesis p.13–15)
Investor / Lender	Strategic Synthesis → Corporate Architecture (p.9–10)	India chapter (arbitrage engine) + China chapter (monopsony)



Each chapter includes a standalone Executive Summary and Strategic Recommendations section — ideal for time-constrained readers who need actionable intelligence fast.

Ch. 00 — Global Executive Brief — Section Index

13 PAGES

GLOBALSESAMEMARKET2026.PDF

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CHINASESAMESEEDIMPORTMARKET.PDF

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	S5: Global Implications & Power Map	8	
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18 PAGES

EUROPEANUNIONSesameSeedImportMarket.PDF

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	S2A: India's Return to EU Leadership / Market Share Evolution	5–6	
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	S3: EU Procurement Behaviour Model	11	
	S4: 2026–2027 Forecast	12	
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10 PAGES

UNITEDSTATESSESAMESEEDIMPORTMARKET.PDF

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16 PAGES

REPUBLICOFKOREASESAMESEEDIMPORTMARKET.PDF

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JAPANESESEEDIMPORTMARKET.PDF

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	Sensitivity Scenarios — 2026–2027 Risk Matrix	15	
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	Cover — Strategic Assessment 2014–2025	1	
	Key Metrics at a Glance / Executive Summary	2–3	
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Ch. 07 — Rest of the World Sesame Seed Import Markets — Section Index

12 PAGES

RESTOFTHEWORLDSESAMESEEDIMPORTMARKETS.PDF

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	S7: RoW Aggregate Supplier Matrix	8	
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Ch. 08 — Strategic Synthesis & Final Verdict —

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	Origin Strategic Matrix: Defend, Invest, Monitor, Exit	11	
	Q1 2026 Update — What's Happening Right Now	12	
	Price Intelligence Matrix — Part A: FOB Origin Forecast Q2 2026	13	
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Supplementary Documents & Report

Inventory Summary

Supplementary Documents

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Disclaimer & Terms of Use	5	Disclaimer_TermsOfUse.docx
Master Table of Contents (This Document)	19	MasterTableOfContents.docx

Report Inventory Summary

Metric	Value
Total Documents	9 core + 3 supplementary
Total Pages (Core Report)	138
Total Trade Records Analysed	34,600+
Longest Dataset	38 years (Japan Customs, 1988–2025)
Markets Covered	China, EU, USA, Korea, Japan, India, RoW (Turkey, MENA, SE Asia, Eastern Europe, Australia)
Data Currency	March 2026 (Mundus Agri updated 17 March 2026)
Publication	Sesameinfo.in × Mukul Gupta (Shakumbhri Expo Impo Ltd)

Ch. 00 — Global Executive Brief

13 PAGES

GLOBALSESAMEMARKET2026.PDF

The entry point for senior leadership. This chapter delivers the highest-level synthesis of the global sesame market — designed for a **2-minute read** that surfaces the decisions that matter most.

What's Inside

- The 30-Second Verdict
- 5 Things Every Senior Leader Must Know
- Origin Power Ranking — Where Each Player Stands
- Origin Scorecard — Q2 2026 Single-Page
- 3 Decisions Every Procurement Head Should Make
- Top Risks & Opportunities by Market
- Price Architecture — The Two-World Map
- Data Foundation & Methodology

Page-by-Page Index

01

Cover & Report Overview

Page 1 — Scope, structure, and navigation guide

02

Finding Deep-Dives

Pages 4 — Implications & urgency mapping

03

Price Architecture

Page 11 — The Two-World Map

Ch. 01–03 — China, EU & United States Markets



Ch. 01 — China

10 Pages | 6,376 Records | 2014–2025

- Market Structure & Four Distinct Price Eras
- Three Structural Winners in Supplier Dynamics
- China's Procurement Behaviour Model
- 2026–2027 Multi-Model Ensemble Forecast
- Global Implications & Power Map



Ch. 02 — European Union

18 Pages | 15-Year Analysis | 2009–2025

- India's Return to EU Leadership
- Company-Level Buyer Intelligence (DE, NL, PL, RO)
- EU Procurement Behaviour Model
- Iran War Risk & RASFF Intelligence (Appendix)
- 9 Key Findings — Executive Summary



Ch. 03 — United States

10 Pages | USDA FAS + Volza + USTR | 2014–2025

- The Three-Act Tariff Story — Fully Resolved
- Supplier Competitive Dynamics
- US Procurement Behaviour Model
- Iran War Risk — US Supply Chain Exposure
- 8 Key Findings — Executive Summary

Ch. 04 & 05 — Korea & Japan Markets

CH. 04 — REPUBLIC OF KOREA

16 Pages | 910 Records | 2014–2025
Korea Customs

Market Structure & 12-Year Data

Historical evolution with full customs dataset — pages 2–3

The China Price Anomaly

A structural pricing irregularity unique to Korea's import profile — page 4

Seasonality — Data-Backed Monthly Procurement

Monthly procurement pattern analysis — page 5

Pakistan's Structural Ascent

Supplier dynamics and CoV-Based Price-Quality Matrix — pages 6–8

Dual-Channel Procurement Model

Korea's unique buying behaviour — pages 9–10

CH. 05 — JAPAN

19 Pages | 6,732 Records | 1988–2025
(38 Years)

Four Decades of Price Regimes

The longest dataset in the report — 38 years of Japan Customs data

Monthly Procurement Calendar

Seasonal buying patterns mapped to origin supply cycles — page 4

China's Complete Exit

The defining structural shift in Japan's import market — page 7

3-Day Clearance Protocol

Japan's procurement behaviour model — pages 10–11

Quarterly Sensitivity Scenarios

2026–2027 forecast with multi-scenario breakdown — pages 12–15

Ch. 06 — India Sesame Seed Market Intelligence

18 PAGES

25,299 EXPORT + 1,621 IMPORT RECORDS

2014–2025 IOPEPC

India is the **arbitrage engine** of the global sesame trade — simultaneously the world's largest exporter and a growing re-importer. This chapter is the most data-rich in the suite.



Full Section Index

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4	S1: India's Sesame Production Landscape
5–6	S2: Export Deep Dive — Full Data Table / Five Export Phases
7	S3: Price Architecture — Three-Tier System
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9	S5: Domestic Consumption (~660–760K MT)
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17	Strategic Outlook & Recommendations
18	Appendix A — FOB Price Series

Why India Matters Most
With 25,299 export records and 1,621 import records, India's chapter contains the largest single-country dataset in the report. The arbitrage engine dynamic — where India both exports premium sesame and re-imports lower-grade product — is a defining structural feature of the global market.

Ch. 07 — Rest of the World Import Markets

12 PAGES

ITC TRADEMAP + FAO + TURKSTAT | 2014–2025

Five distinct sub-blocs, each with its own structural logic, growth trajectory, and supplier preferences. The RoW chapter reveals the **fastest-growing and most underanalysed** segments of the global sesame trade.

**Turkey**

The World's Pivot Importer

S2 — Page 3. Turkey's unique role as both a major importer and re-exporter of processed sesame products.

**MENA**

The Tahini Belt

S3 — Page 4. Middle East & North Africa demand driven by tahini production and food culture.

**SE Asia**

The Oil-Crushing Corridor

S4 — Page 5. Southeast Asia's industrial demand for sesame oil crushing capacity.

**Eastern Europe**

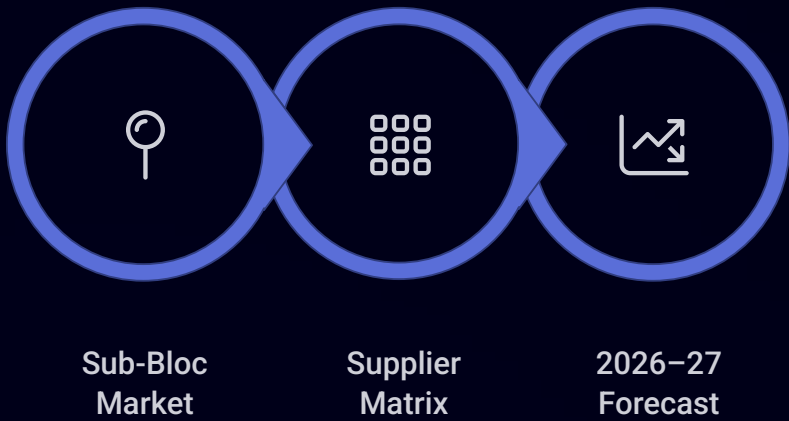
Fastest-Growing Segment

S5 — Page 6. **6% CAGR** — the highest growth rate of any regional bloc in the report.

**Australia**

Premium Niche Market

S6 — Page 7. Quality-focused procurement with distinct origin preferences and certification requirements.



The RoW chapter concludes with a consolidated supplier matrix (S7, page 8) and global strategic recommendations applicable across all five sub-blocs (S10, pages 10–11).

Ch. 08 — Strategic Synthesis & Final Verdict

22 PAGES

CROSS-MARKET SYNTHESIS OF ALL 34,600+ RECORDS

The capstone document. Read this **last** — it synthesizes every market chapter into three structural realities, a definitive verdict, and actionable 12-month plans for both importers and exporters.



Reality 1

The Bifurcation Is Permanent — two distinct price worlds now operate in parallel across global sesame markets.

Reality 2

Capital Determines Who Wins the Inventory Game — working capital access is now a structural competitive advantage.

Reality 3

The Iran War Has Permanently Redrawn Logistics — supply chain geography has shifted irreversibly.

Strategic Synthesis — Full Section Index

The 22-page synthesis document is the most action-oriented chapter in the suite. Below is the complete page-by-page breakdown for navigation.

Page	Section
1	Cover — The So What — Read This Last
2	The Three Structural Realities
3	Reality 1: The Bifurcation Is Permanent
4	Reality 2: Capital Determines Who Wins the Inventory Game
5	Reality 3: The Iran War Has Permanently Redrawn Logistics
6	THE VERDICT
7	2026 Market Sizing — Cross-Referenced
8	Organic, Specialty & Next-Generation Demand
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11	Origin Strategic Matrix: Defend, Invest, Monitor, Exit
12	Q1 2026 Update — What's Happening Right Now
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15	Price Intelligence Matrix — Part C: Monday Morning Action Table
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21	Final Verdict — Global Sesame Seed Market 2026
22	Report Credentials & Data Foundation

Origin Strategic Matrix

Page 11 classifies every major origin into one of four strategic postures:

 Defend
Protect existing market share
 Invest
Accelerate position-building
 Monitor
Watch for inflection signals
 Exit
Reduce exposure strategically

The Corporate Architecture section (pages 9–10) maps Tier 1, 2, and 3 players across the global trade ecosystem.

Report Inventory — At a Glance

COMPLETE SUITE SUMMARY

MARCH 2026

9

Core Documents

Plus 3 supplementary files
(Methodology, Disclaimer, ToC)

138

Core Report Pages

Across all 9 chapters

34,600+

Trade Records

Cross-market synthesis

38

Years (Longest Dataset)

Japan Customs 1988–2025

Core Chapter Inventory

Ch.	Market	Pages	Records
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02	European Union	18	Multi-source
03	United States	10	USDA FAS
04	Republic of Korea	16	910
05	Japan	19	6,732
06	India	18	26,920
07	Rest of the World	12	ITC/FAO
08	Strategic Synthesis	22	All 34,600+

Supplementary Documents

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B	Disclaimer & Terms of Use	5
C	Master Table of Contents	3

Markets Covered & Data Foundation



Primary Markets

China · European Union · United States · Republic of Korea · Japan · India



RoW Sub-Blocs

Turkey · MENA (Tahini Belt) · Southeast Asia · Eastern Europe · Australia

Data Currency: March 2026 - Agri updated 17 March 2026.

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