The African Sesame Industry and the Chinese Tariff Exemption

This working paper analyses the African sesame export supply chain to China and assesses the impact of the tariff exemption granted by Peking to African least developed countries (LDCs) since 2005. Drawing on the Comtrade and FAO databases, it shows that China, having become a net importer in 2004, now relies on Africa for more than 80% of its sesame seed imports, as its own production has declined sharply. Six countries account for 95% of African exports to China: Niger, Sudan, Tanzania, Togo, Mozambique and Ethiopia. This working paper also highlights tariff circumvention phenomena, notably Nigerian transit through Niger and Beninese or Ivorian transit through Togo, which renders origin statistics unreliable. The extension of the exemption to non-LDC countries from 1 May 2026 is not expected to have much effect, as these countries represent less than 0.4% of Chinese imports of African sesame, and their commercial networks are oriented towards other markets. Ultimately, it is Chinese importer-processors rather than African producers who benefit most from the tariff advantage, without altering the structure of a supply chain built on the export of raw materials from Africa and industrial processing in China.

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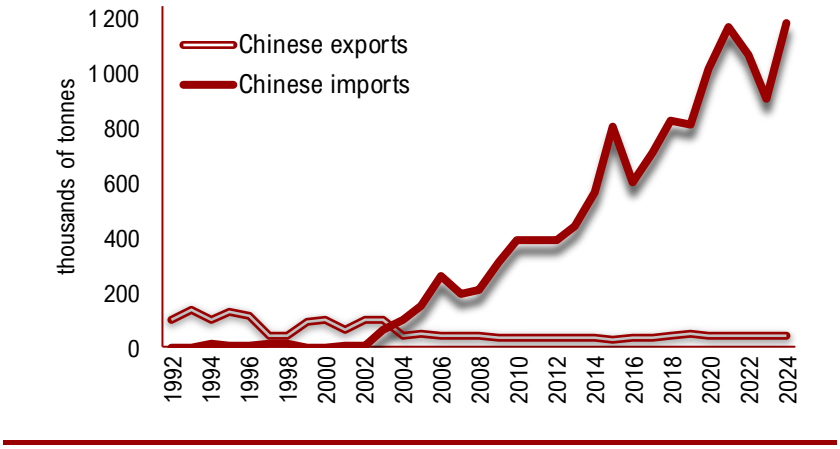
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Between 2004 and 2024, China's imports of sesame seeds increased eighteenfold, rising from 65,574 tonnes to over 1.18 million tonnes. This development can be explained by two converging structural trends. On the one hand, there has been a continuous decline in Chinese production, with its share of global output falling from 32% in 2002 to just 6% in 2024. On the other hand, there has been a rise in African export supply chains, which now account for over 80% of supplies. Against this backdrop, the impact of the tariff exemption initially granted by China to the least developed countries in Africa in 2005, and subsequently to all African countries with which Beijing has diplomatic relations, must be considered.

1. Sesame Exports, Imports and Production

The Comtrade online statistical database allows us to track Chinese demand since 1992. Initially a net exporter of sesame seeds, China subsequently became a net importer, as illustrated in Figure 1. It only became a net importer in 2004, with the quantities imported increasing by 1,703% over the following twenty years, rising from 65,574 tonnes in 2004 to 1,182,602 tonnes in 2024.

Figure 1.– Quantities of sesame seeds imported by China (1992-2024)



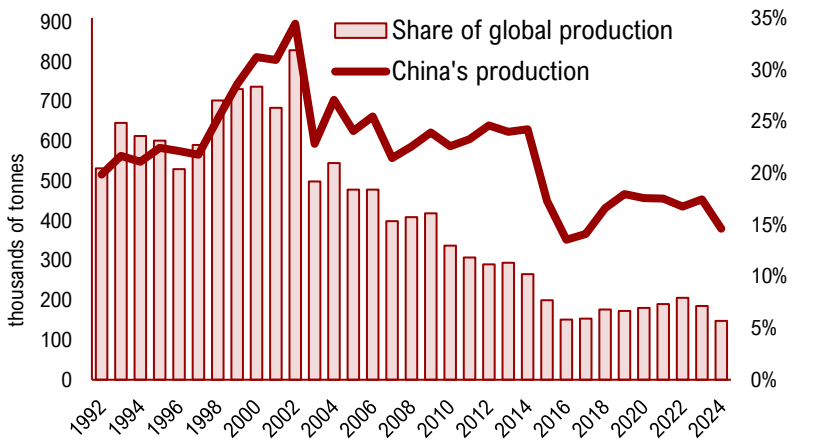
Indeed, even after deducting exports, net imports must still be augmented by Chinese production in order to assess effective sesame seed consumption. The FAO online database shows how this production has changed over time. Considering the period from 1992 to 2024 as a whole, China ranks second among sesame seed producers, accounting for an average of 13% of global production, behind India and ahead of Myanmar. Prior to its production decline, China accounted for 32% of global production in 2002. By 2024, however, it had fallen to eighth place, accounting for just 6% of global production (see Figure 2). What happened, and how can we explain this?

Several structural factors have contributed to the decline in sesame production. Kong Lijuan[1] identifies the reduction in cultivated areas as 'the direct factor' (直接因素) behind the fall in total output. Since Chinese yields are relatively high, the decline in production has been smaller in proportion to the reduction in cultivated areas. However, the downward trend persists. The author also explains that farmers prefer to grow maize, groundnuts or cotton because these crops are easily mechanised and subsidised by the state[2]. A survey, whose results she presents, confirms this

1 Kong Lijuan [孔丽娟], 中国芝麻产业竞争力研究 [Study on the Competitiveness of China's Sesame Industry], Master's thesis, Huazhong Agricultural University, Wuhan, 2011, p. 47.

2 *Ibid.*, p. .42.

Figure 2.– Chinese sesame seed production (1992–2024)



preference for less labour-intensive crops[3]. He Dongping, President of the Oils and Fats Section of the China Cereals and Oils Association, specifies that Chinese land is primarily used for growing cereals to ensure food security (**保障食品安全**)[4].

Technical factors also help to explain this situation. Kong Lijuan notes that around 75% of seeds are sourced through self-conservation or market purchases, with fewer than 20% originating from research institutes[5]. Qin Lingling *et al.* report that China remains the global leader in yields, which reportedly reached 1,425 kg/ha in 2020 — approximately three times the global average[6]. However, Xu Guodong and Zhang Wenli state that yields in Lebanon can exceed 3,600 kg/ha[7]. Furthermore, China has developed new varieties that are resistant to mechanised threshing. Whilst this demonstrates China's technical progress, it is not sufficient to offset the decline in cultivated areas[8]. Xu Guodong and Zhang Wenli attribute this decline in production to a global trend: the movement of production towards Africa and import markets towards Asia[9]

2. Chinese Sesame Consumption

To estimate annual sesame consumption, we must consider not only the production of sesame seeds (HS 120740 in the Harmonised System), but also the production of sesame oils (HS 151550) obtained from processing the seeds. In order to do so, we must make several assumptions.

- We shall assume that the oil extraction rate from pressing seeds is consistently 45%. Depending on the process used, it is possible to recover up to 90% of the oil contained in

3 *Ibid.*, p. 24-25.

4 Ni Hao [**倪浩**] and Zhao Juecheng [**赵觉珵**], **非洲动荡，中国芝麻不够用？** [African Unrest: Will China Run Short of Sesame?], **环球时报** [Global Times], 12 March 2022, p. 4.

5 Kong, *op. cit.*, p. 41.

6 Qin Lingling [**秦灵灵**] *et al.*,**世界芝麻生产现状与我国芝麻生产发展趋势分析** [Analysis of the Current State of Global Sesame Production and Trends in Chinese Sesame Production Development],**中国油脂** [China Oils and Fats], 49(3), 2024, p. 3.

7 Xu Guodong [**许国栋**] and Zhang Wenli [**张雯丽**], **世界芝麻生产、贸易结构变化趋势分析** [Analysis of Global Sesame Production and Trade Structure Change Trends], **世界农业** [Agriculture mondiale], n° 474, 2018, p. 133.

8 Qin Lingling *et al., op. cit.*, p. 3.

9 Xu Guodong et Zhang Wenli, *op. cit.*, p. 135-136.

sesame seeds, which generally range from 45% to 65% oil. We shall retain an oil extraction rate of 45%, which appears to be a common figure, summarising the situation in China[10] as well as worldwide. In other words, 1 kg of oil requires 2.2 kg of seeds. To assess the volumetric consumption of processed seeds, therefore, the weight of oil produced must be multiplied by 2.2.

- The sesame harvest season may vary slightly from one country to another, but it is generally concentrated in autumn. The sale of seeds continues throughout the year, depending on the requirements of buyers and sellers, as well as market conditions. Oil mills operate continuously, meaning they press seeds regardless of the natural seasonal cycle. For the purposes of our analysis, therefore, it is simpler to disregard any time lag and consider that both raw and processed seeds are produced in the same year.

Consequently, we can estimate Chinese consumption for a given year on the basis of the following equation:

$$\textit{local seed production} + \textit{seed imports} - \textit{seed exports} + \textit{local oil production} \times 2.2 + \textit{oil imports} \times 2.2 - \textit{oil exports} \times 2.2$$

The results of this estimation are presented in Table 1. Over approximately twenty years, sesame consumption has almost doubled, rising from 1.2 million tonnes to 2.2 million tonnes. During this period, dependence on imports for this consumption increased from 8.5% to 53.9%, whilst China's share of total sesame imports rose from 10.4% to 46.1%. Consequently, China has transitioned from near self-sufficiency to a state of heavy reliance on global sesame producers. Although the trade deficit for the supply chain[11] has increased 80-fold, rising from USD 22 million in 2004 to USD 1.7 billion in 2024, its impact on China's overall positive trade balance has remained minimal, averaging below 0.2% (see Figure 3). In other words, although China is now highly dependent on its sesame suppliers, the financial cost remains very low.

3. China's Sesame Suppliers

From 2004 to 2024, China imported an average of 82% of its sesame seeds from Africa, compared to just 18% from Asia. As shown in Figure 4, the predominance of Africa appears to have become structurally entrenched, even if more or less significant shifts can be observed.

As previously mentioned, 2004 was the year that China became a net importer of sesame seeds. The context is particular, as reported by Yang Mei and Huang Fenghong. [12] According to these authors, Chinese sesame production fell sharply in 2003 due to prolonged rainfall in the production areas of Henan, Anhui and Hubei. This resulted in total crop losses in Zhumadian and Luohe (Henan) and Fuyang (Anhui). With insufficient stocks available, Chinese traders had to import sesame from Asia and Africa to maintain their operations. This is how China moved from being a

[10] 什么芝麻出油率高？常见品种辨析与选购指南 [Which Sesame Varieties Have a High Oil Yield? Analysis of Common Varieties and Purchasing Guide], 14 July 2025 (The website 一亩田 [One Mu of Land], which provides these figures, is a B2B platform for small-scale agricultural producers). The figure is confirmed by the FOCAC website: 非洲的芝麻产量占全球 60%以上 主要出口中国 [African Sesame Production Accounts for Over 60% of Global Output and Is Mainly Exported to China], 25 December 2022.

[11] The trade balance for oils is positive whilst that for seeds is negative. The oil trade surplus amounts to 2% of the seed trade deficit.

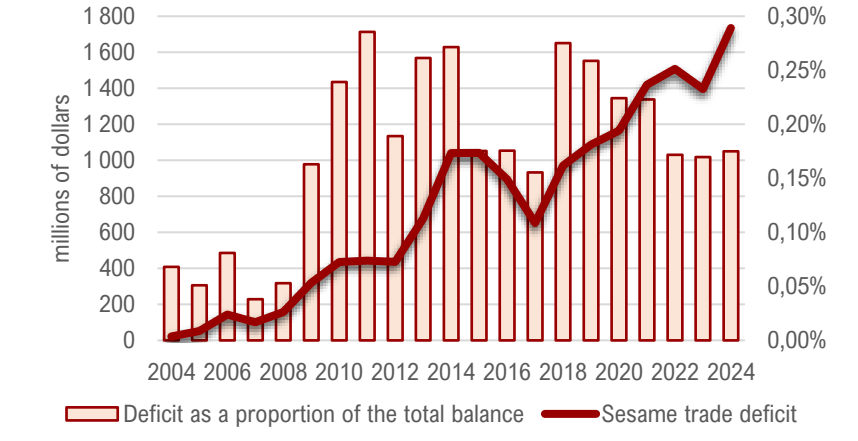
[12] Yang Mei (杨湄) and Huang Fenghong (黄凤洪), 中国芝麻产业现状与存在问题、发展趋势与对策建议 [Current State and Problems of China's Sesame Industry, Development Trends and Policy Recommendations], 中国油脂 [China Oils and Fats], 34(1), 2009, p. 7–12.

net exporter to a net importer of sesame in 2004. Although approached, it appears that Africa had difficulty meeting Chinese demand as supply chains to China had not yet been established. It was therefore Asia, and India in particular, a major global exporter of sesame, which responded to the urgent need, since commercial flows already existed.

Tableau 1.– Estimated Chinese sesame consumption in grain equivalent (2004–2024)

Year	Production in grain equivalent (1000 tonnes)	Imports in grain equivalent (1000 tonnes)	Exports in grain equivalent (1000 tonnes)	Estimated consumption (1000 tonnes)	Import dependency rate	China's share of world imports	China's share of world exports
2004	1,175	104	53	1,226	8.5%	10%	7%
2005	1,113	158	65	1,206	13.1%	16%	5%
2006	1,162	266	58	1,370	19.4%	23%	6%
2007	1,016	199	54	1,161	17.1%	18%	5%
2008	1,003	219	51	1,171	18.7%	20%	5%
2009	1,109	315	41	1,383	22.8%	26%	3%
2010	1,113	393	41	1,465	26.8%	29%	3%
2011	1,151	394	41	1,504	26.2%	29%	3%
2012	1,171	400	45	1,526	26.2%	31%	2%
2013	1,149	446	42	1,553	28.7%	29%	2%
2014	1,190	573	42	1,721	33.3%	35%	2%
2015	1,044	809	38	1,815	44.6%	41%	2%
2016	995	605	43	1,557	38.8%	34%	2%
2017	1,029	716	48	1,697	42.2%	37%	2%
2018	1,099	832	54	1,876	44.4%	37%	3%
2019	1,105	814	63	1,856	43.8%	37%	3%
2020	1,129	1,018	59	2,088	48.8%	40%	3%
2021	1,087	1,175	63	2,199	53.4%	49%	3%
2022	1,087	1,072	59	2,099	51.0%	48%	4%
2023	1,091	915	58	1,948	47.0%	41%	3%
2024	1,074	1,183	61	2,197	53.9%	46%	3%

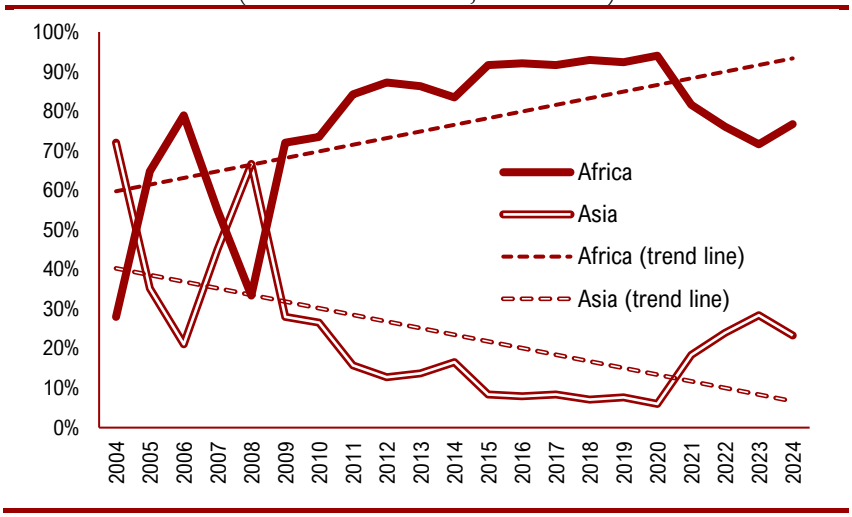
Figure 3.– Sesame trade balance (2004-2024)



In 2008, the positions of Africa and Asia briefly reversed. According to a FAO report[13], this year corresponded to a period of institutional transition in the marketing of Ethiopian sesame: the old

[13] Kuma Worako, T., Mas Aparisi, A., Lanos, B. (eds.), Analysis of Price Incentives for Sesame Seed in Ethiopia for the Time Period 2005–2012. FAO, Technical Notes Series, MAFAP, 2015, p. 13.

Figure 4.– Supplying continents for sesame seeds
(from data in tonnes, 2004–2024)



over-the-counter system was being dismantled, but the new system had not yet become operational. The report adds that this institutional void most likely created a bottleneck in the marketing and export chain. It also suggests that Ethiopian traders speculatively retained stock in 2008, betting on future price rises and thereby mechanically reducing export volumes that year[14]. Consequently, Chinese orders were redirected towards Asian producing countries[15].

The period from 2020 to 2024 is characterised by a moderate shift in favour of Asia. Pakistan could be the driving force, given that its exports to China have increased 18-fold during this period. According to Li Yiyao's dissertation, Pakistan's exports to China have increased substantially since it obtained tariff exemption status in 2021, surpassing Sudan and Tanzania in 2023 to become China's second-largest supplier, just behind Niger[16]. The author explicitly attributes Pakistan's emergence as a supplier to fill a market gap to the armed conflict in Sudan and the resulting disruption to shipping in the Red Sea[17].

The difference in average prices between Africa and Asia confirms that this is not simply price arbitrage. In 2024, the average price of African sesame was 24% higher than that of Asian sesame (USD 1,644 versus USD 1,327 per tonne), and this difference was considerably greater than in previous years, when the prices of the two continents were roughly equal (see Table 2). However, it was precisely in 2024 that China increased its purchases from Africa more rapidly than from Asia. This contradicts the idea of price arbitrage: if China were simply seeking to minimise its procurement costs, it would have increased its reliance on Pakistan, whose average price fell by 27% (from USD 1,744 to USD 1,275 per tonne), rather than sourcing from Niger, Ethiopia, Mozambique, and Tanzania. Li Yiyao explains this paradox, emphasising that industrial uses differ according to the origin of the seeds. Nigerian sesame is primarily used for oil pressing and dehulling;

14 *Ibid.*, p. 30.

15 Some authors such as Hu Wei *et al.* (2016 **年山东口岸进口油籽质量分析**, **检验检疫学刊**, 27(6), 2017, p. 37) cited a poor Ethiopian harvest in 2007 to explain the decline in Chinese imports in 2008. However, available Ethiopian data contradict this hypothesis and instead point to a 25% increase in production (*Agricultural Sample Survey 2007/2008 (2000 E.C.)*, Vol. I, p. 17). There was thus more sesame available, which makes it all the more plausible that the 2008 bottleneck lay on the marketing and export side rather than on the production side. This would also better explain the rebound of +94% in exports in 2009 as reported by the FAO.

16 Li Yiyao (**李易遥**), Y **公司芝麻进口业务竞争战略研究** [Study of the Competitive Strategy of Company Y in the Sesame Import Business], Master's thesis, Dalian University of Technology, 2024, p. 23-24.

17 *Ibid.*, p. 30.

Sudanese sesame is used for dehulling and downstream processing; Tanzanian and Mozambican sesame has an aromatic profile that is considered irreplaceable by certain oil mills and sesame paste factories.[18] This suggests segmentation by end use rather than pure price substitutability.

Table 2.– Sesame prices in USD per tonne

Continent	2020	2021	2022	2023	2024
Africa	1,247	1,303	1,543	1,679	1,644
Asia	1,704	1,484	1,572	1,772	1,462

4. African Supplier Countries

Firstly, it should be noted that Chinese imports of sesame oil from Africa accounted for just 0.08% of the country's total imports of the product between 2020 and 2024, with a value of USD 17,361. The very small sums involved explain why the question of sesame oil is not addressed in the following pages.

From 2020 to 2024, six African countries accounted for almost 95% of African sesame seed exports to China. In order of importance, these were Niger, Sudan, Tanzania, Togo, Mozambique and Ethiopia. However, the export figures for these countries tell different stories.

Over the period as a whole, Niger appears as China's foremost supplier. In 2024, Peking declared that it had imported 315,795 tonnes from Niger. This volume exceeds the 141,025 tonnes reported by the FAO as Niger's production for the same year.[19] There has undoubtedly been some tariff arbitrage here. Niger has LDC status, and the import duty rate on sesame seeds has been 0% in China since 2005 (see below). Nigeria, on the other hand, does not have this status. Until 1 May 2026, the applicable rate was the most favoured nation (MFN) rate of 10%. Therefore, an operator who purchases sesame in Nigeria, whose production is approximately three times that of Niger, has a direct financial incentive to cross the Niger–Nigeria border with the goods, obtain a certificate of Nigerien origin and then ship to China under that origin. The gain is immediate: 10% customs duty is avoided on a market value of around USD 1,200 per tonne, providing a benefit of USD 120 per tonne, which far exceeds transit costs. A company such as Hectar Global, a Singaporean firm which claims to source from both Niger and Nigeria, operates precisely in this corridor and necessarily faces the question of origin.[20] Another Singaporean company, Wilmar International (丰益国际), operates in Hubei Province through its subsidiary, Yihai Kerry Grain & Oil Industry Co (益海嘉里). Unlike Hectar Global, which is a commercial platform, Yihai Kerry achieves vertical industrial integration between upstream activities in Africa and downstream activities in China, where African sesame is processed. A Chinese press article explicitly refers to the import of sesame from Niger in connection with the tax exemption.[21]

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18 *Ibid.*, p. 24.

19 Comtrade data record declared exports totalling 350,884 tonnes, of which 22,379 tonnes to Turkey and 9,217 tonnes to Japan.

20 Hectar Global, Sesame Seeds Trading Desk – Niger & Nigeria to China, South Korea & Japan.

21 Zhang Aihui [张爱虎], 湖北首单！尼日尔芝麻见证中国诚意 [A First for Hubei! Niger Sesame Bears Witness to China's Good Faith], 湖北日报 [Hubei Daily], 11 December 2024. The journalist is confusing the fact that customs officials in Hubei inspected imported sesame for the first time with the fact that sesame seeds from a Least Developed Country were subject to a zero-custom duty rate for the first time.

The same scenario is repeated with Togo, the fourth-largest exporter to China (see Table 3), which also benefits from LDC status. As we noted with regard to cocoa[22], Togo has already been using this status. Therefore, this situation suggests that statistics in the Comtrade database by 'reporting country' should be regarded as statistics of the last point of origin certification and not as a reliable measure of the actual country of agricultural origin.

Table 3.– The strong performance of Niger and Togo

2024	Production		Exports (tonnes)	
Producteurs	tonnes	World rank	Total	China
Niger	141,025	16e	350,884	315,795
Togo	1,882	53e	116,033	96,584

Sudan is the world's third-largest producer and China's second-largest supplier. The data we report cover the years 2020–2024. In other words, we did not need to statistically account for the partition of Sudan into two new entities: Sudan and South Sudan[23]. Notably, Sudan's exports have declined considerably in recent years, by 61% between 2020 and 2024. Instability in Sudan constitutes one of the main risks currently affecting the sesame market, alongside instability in Myanmar. The intensification of the civil conflict from 2023 onwards has disrupted agricultural activities, transport infrastructure, and export logistics in the Kordofan and Darfur regions, where most of Sudan's sesame is produced.[24]

Table 4.– African supplier countries of sesame seed to China

Suppliers	Exports to China (kilograms)					Total	
	2020	2021	2022	2023	2024	tonnes	share
Niger	177,451,720	297,255,000	209,786,470	192,529,620	315,794,720	1,192,818	26.90%
Sudan	231,131,580	148,746,629	170 902,660	104,439,200	90,619,750	745,840	16.82%
Tanzania	139,873,061	110,538,910	103,664,665	130 369,597	147,880 991	632,327	14.26%
Togo	112,177,892	165,049,035	113,915,750	91,463,800	96,584,400	579,191	13.06%
Mozambique	103,049,934	65,804,495	113,380 416	85,859,920	145,604,062	513,699	11.59%
Ethiopia	146,101,800	121,191,350	73,908,640	30,822,060	89,818788	461,843	10.42%
Mali	52,298,959	37,747,219	19,906,587	16,866,977	22,792,012	149,612	3.37%
Burkina Faso	1,700,195	13,755,911	18250,059	13,335,994	13,030,307	60,072	1.35%
Uganda	15,078,970	12,502,610	12,110,614	5,081,750	3,920,269	48,694	1.10%
Senegal	1,510,878	3,286,801	3,963,786	3,277,950	3,508,395	15,548	0.35%
Gambia	2,120,468	4,548,923	2,833,515	1,397,166	3,818,560	14,719	0.33%
Nigeria	3,741,167	4,681,414	1,377,940	3,219,580	1,035,704	14,056	0.32%
Somalia	735,300	2,911,520	0	0	0	3,647	0.08%
Kenya	971,158	361,000	0	114,000	57,000	1,503	0.03%
Cameroon	19,000	380,006	0	1	0	399	0.01%
Ghana	0	18,203	0	0	0	18	0.00%
Egypt	0	0	17,500	0	0	18	0.00%
Benin	0	4	0	0	0	0	0.00%
Tchad	0	0	0	0	3	0	0.00%
Total	987,962,082	988,779,030	844,018,602	678,777,615	934,464,961	4,434,002	100.00%

[22] Thierry Pairault, *The African Cocoa Industry and the Chinese Tariff Exemption*, working paper, 13 June 2026.

[23] In order to manage this partition, we adopted the simplest solution. Until the 2005 peace agreement, China supported Khartoum unconditionally. Then, whilst taking care not to alienate either party, it began to cultivate new relations with Juba. When South Sudan gained independence in July 2011, China swiftly recognised the new nation, which possesses 75% of Sudan's oil reserves. Therefore, we can conclude that purchasing sesame seeds from South Sudan was not a priority for Peking before 2011. This is further confirmed by the low volume, or indeed complete absence, of Chinese imports between 2012 and 2024.

[24] Hectar Global, Sesame Seeds: A 5,000-Year-Old Crop Navigating Rising Geopolitical Risk, 2 April 2026.

Ethiopia, which was once China's leading supplier and currently ranks sixth in global production, is undergoing a development similar to Sudan's, with a 40% decline in exports to China. This situation is undoubtedly related to the conflict between the Addis Ababa government and the Tigray region since 2020. The Humera area, located in north-west Tigray near the Sudanese border, has developed into a major commercial hub thanks to the cultivation of sesame on the fertile lands along the Tekezé River. Humera is often referred to as Ethiopia's 'sesame capital'. However, according to Li Yiyao, the continuous rise in the price of Ethiopian sesame beyond what the Chinese market would accept may also have contributed to this decline.[25]

5. African Least Developed Countries and Tariff Exemption

It is currently extremely difficult to find an official document confirming that sesame seeds[26] were among the 194 tariff lines for which African least developed countries were exempt from customs duty payments from 2005. The only clear reference I have found is an indirect one in a statement by a Ministry of Commerce official responsible for Western Asia and Africa during an interview.[27] In the same year, UNCTAD expressed concern that certain agricultural products, including sesame seeds, which are important for the least developed countries (LDCs), were not eligible for a duty-free admission scheme offered by the European Union, Japan and the United States[28].

According to the FAO online database, 30 African countries produce sesame seeds. To this number, we should add Ghana, which is currently a very small producer targeting the Chinese market in particular.[29] At the same time, 33 African countries have LDC status. However, not all producing countries, whether or not they are LDCs, sell their sesame to China. From 2020 to 2024, on average, non-LDC African countries represented only 0.4% of China's imports of African sesame, in terms of both volume and value (see Table 5).

To benefit from the advantages granted to least developed countries, each potentially eligible African country first had to sign an agreement known as an "exchange of letters" (**换文**). The decision, promulgated in September 2024, clearly establishes that this procedure will be abolished with effect from 1 December of that year.[30]

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25 Li Yiyao, *op. cit.*, p. 24, 66.

26 This refers to the category of sesame seeds for consumption (HS 12074010) and not those used as planting seeds (HS 12074090), which remained taxed at 10% (MFN clause) and 70% (standard clause).

27 **商务部西亚非洲司负责人就给予非洲最不发达国家部分输华商品零关税待遇（下称对非零关税）问题答记者问** [Press Statement by the Head of the Department for Western Asia and Africa at the Ministry of Commerce on the Issue of Granting Zero-Tariff Treatment to Least Developed Countries in Africa for Certain Goods Exported to China (hereinafter "Africa Zero-Tariff")], **宁波进出口商会** [Ningbo Chamber of Import and Export Commerce], 28 August 2007. The FOCAC website states that "Since 2002, China has been importing small quantities of sesame from Africa. From 1 January 2005, China progressively applied a zero-tariff rate to more than 4,000 products imported from several African developing countries [...]. Thanks to the customs duty exemption granted by China, direct sesame exports from countries such as Ethiopia, Sudan and Mali to China increased markedly." This text, like others repeating the same sentence, does not allow one to assert with certainty that the tariff exemption was applied to sesame seeds from 2005.

28 UNCTAD, *Erosion of preferences for the least developed countries: assessment of effects and mitigating options*, Geneva, 4 August 2005, p. 9.

29 GIRSAL Launches Sesame Pilot Project to Unlock Ghana's Export Potential of Sesame, July 2025.

30 **国务院关税税则委员会发布公告给予最不发达国家100%税目产品零关税待遇** [The State Council Tariff Commission Published a Notice Granting LDCs Zero-Tariff Treatment on 100% of Tariff Lines], 18 September 2024. The administrative removal date (1 December 2024) precedes the date of implementation of the exemption (1 January 2025).

Table 5.– African producers and suppliers

	LDCs	Non-LDCs
Number of African countries		
• 31 sesame producers	22	9
• 19 of which supply China	14	5
Share of Chinese imports		
2020	99.5%	0.5%
2021	99.4%	0.6%
2022	99.8%	0.2%
2023	99.5%	0.5%
2024	99.9%	0.1%
Average	99.6%	0.4%

The first question that arises is how much it would cost China to extend the tariff exemption to sesame seeds produced by non-LDC African countries. Under the most-favoured-nation clause, the import duty rate on these seeds entering China is 10%. Applying this rate to imports from the five non-LDC producer countries (Nigeria, Kenya, Cameroon, Ghana and Egypt) exporting to China on average over the 2020-2024 period shows that China would have foregone USD 1.9 million had it applied the exemption to all 53 African countries from 2020. This represents 0.02% of the total value of Chinese imports of sesame seeds on average (see Table 6).

Table 6.– The cost of the exemption

Year	Imports (millions of dollars)			Tax revenue	
	World	Africa	Africa non-LDC	millions of dollars	% import value
2020	1,272.44	1,232.08	5.25	0.5	0.04%
2021	1,540.97	1,288.12	5.69	0.6	0.04%
2022	1,631.96	1,302.36	1.64	0.2	0.01%
2023	1,527.62	1,139.43	4.57	0.5	0.03%
2024	1,866.44	1,536.12	1.71	0.2	0.01%
Total	7,839.43	6,498.10	18.86	1.9	0.02%

A second question that arises is whether non-LDC African countries will use the windfall granted on 1 May 2026 to increase their exports to China.

6. Newly Eligible Non-LDC Countries

By cross-referencing the FAO's data on sesame seed production with Comtrade's trade data, we can identify three groups of non-LDC countries that are newly eligible for the tariff exemption.

The first group comprises countries that, according to FAO data, do not produce sesame seeds. These countries are South Africa, Algeria, Botswana, Cape Verde, Gabon, Ghana, Equatorial Guinea, Mauritius, Libya, Namibia, the Seychelles and Tunisia. Therefore, the question of eligibility for the tariff exemption does not arise for these countries. Ghana's case is not entirely clear. Sesame cultivation was introduced as a cash crop in the 2000s, primarily in the savannahs of northern Ghana and certain areas of the Oti and Bono East regions.[31] However, the success of this strategy has yet to be realised: In 2024, Ghana was the 84th largest exporter, accounting for just 0.004% of global sesame seed exports.

[31] Tridge, *Sesame Seed from Ghana*, 2026 ; Alimenterre, *Au Ghana : le sésame, tremplin vers l'agroécologie*, 2019.

The second group comprises five countries whose combined production equates to 0.65% of total African production between 2020 and 2024 (see Table 7). All of these countries have clearly defined commercial outlets other than China, except for Kenya, which has China as its second-largest customer. Given the small quantities involved and the well-established commercial channels, it is highly unlikely that the Chinese tariff exemption will have any significant impact.

Table 7.– Small producers and their customers (2020–2024)

Country	% of African production	1st customer		2nd customer		3rd customer		Top 3 total
		country	share	country	share	country	share	
Zimbabwe	0.27%	Mozambique	56%	Turkey	38%	South Africa	5%	99%
Kenya	0.15%	Turkey	24%	China	19%	India	15%	57%
Congo DRC	0.13%	France	74%	South Africa	20%	Belgium	4%	97%
Côte d'Ivoire	0.09%	Turkey	88%	Israel	3%	India	3%	94%
Morocco	0.01%	U.-Kingdom	74%	India	13%	Oman	11%	98%

The third group comprises three countries (Nigeria, Cameroon and Egypt, in order of importance), which together produce almost 15% of Africa's sesame seeds (see Table 8). These countries would therefore concentrate the bulk of the real benefit from the tariff exemption. However, their situations are very different. For Nigeria, the measure, which will take effect on 1 May 2026, is less of a windfall than a regularisation, since China was already its main market, albeit under the guise of a Nigerien certificate of origin (see above). The extension of the exemption removes the commercial incentive for this subterfuge, which should be reflected in future statistics by a visible shift: an increase in Chinese imports from Nigeria, and a corresponding decline in imports from Niger. This statistical rebalancing will not result in any gain or loss for either Nigeria or China.

Table 8.– Nigeria, Cameroon and Egypt (2020–2024)

Country	% of African production	1er customer		2e customer		3e customer		Top 3 total
		country	share	country	share	country	share	
Nigeria	11.09%	Japan	40%	Turkey	18%	India	9%	67%
Cameroon	2.05%	Morocco	36%	Turkey	12%	Tunisia	11%	58%
Egypt	1.40%	Oman	34%	Turkey	21%	Viet Nam	18%	73%

The situation is different for Cameroon and Egypt. Whilst their production is relatively modest (2.05% and 1.40% of African production, respectively), their commercial networks are oriented towards other markets, such as Turkey and the Middle East. Furthermore, no analogous tariff circumvention mechanism to that of the Niger-Nigeria corridor is documented for these two countries. In the medium term, tariff exemption could play a role if these countries sought to supplement their commercial circuits by developing their production.

In conclusion, African countries without least developed country status will derive very limited or even zero benefit from this tariff exemption, even if it constitutes a clear incentive to turn towards China.

The tariff exemption will primarily benefit Chinese importers-processors, such as Yihai Kerry (益海嘉里) and Flavor Full (富味乡), rather than African producers. The tariff advantage is captured at the point of entry into China by companies whose shareholders are Chinese, Singaporean, or Taiwanese. Whilst African smallholders may potentially exert slight upward pressure on FOB prices

if competition for the purchase of seeds intensifies, the bulk of the gain will go to processors operating in China. The dominant form of organisation of the sesame supply chain in relations between Africa and China is the vertical integration of African upstream activities with Chinese downstream activities, without any industrialisation of processing in Africa. Commercial flows consist of raw commodity flows (*i.e.*, no sesame oil). Therefore, regardless of the rhetoric about South-South cooperation, Chinese tariff policy does not alter this distribution of added value.