

Tahini Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application

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Abstracts

Introduction

The tahini market encompasses the production and distribution of tahini, a paste made from ground sesame seeds that serves as an essential condiment and ingredient across diverse global cuisines. Tahini is characterized by rich, nutty flavor profile, creamy texture when properly processed, high nutritional density including protein, healthy fats, vitamins, and minerals, and versatile culinary applications spanning savory and sweet preparations. The product exists in multiple variants including white tahini made from hulled sesame seeds offering milder flavor and lighter color suitable for savory dishes, black tahini produced from unhulled black sesame seeds providing more intense flavor and darker appearance often used in sweet applications, raw tahini from unroasted seeds, and roasted tahini from toasted seeds offering enhanced flavor complexity.

Tahini serves essential culinary functions across Middle Eastern, Mediterranean, Balkan, South Asian, and Central Asian cuisines, with significant usage in Russian and North African regions. The paste functions as a foundational ingredient in traditional dishes including hummus (chickpea dip), baba ghanoush (eggplant dip), and halva (confection), while serving as a condiment for meat dishes, a spread for breads and pita, a sauce base when combined with lemon juice and garlic, and a flavoring agent in both savory and sweet preparations. Chinese cuisine utilizes tahini primarily in hot dry noodles and sesame sauce noodles, as a bread or steamed bun spread, as a component in northern Chinese pancake seasonings, as a cold dish condiment, and as a hotpot base ingredient and dipping sauce component.

The industry benefits from growing awareness of tahini's nutritional benefits including

high-quality plant protein and healthy fats, expanding Middle Eastern and Mediterranean cuisine popularity globally, rising plant-based and vegetarian dietary trends increasing sesame paste consumption, growing ethnic food market development in Western countries, and increasing consumer interest in authentic, traditional ingredients. Global sesame seed cultivation spans approximately 13 million hectares annually producing over 6 million tons of seeds, providing abundant raw material supply supporting tahini production worldwide.

Market Size and Growth Forecast

The global tahini market is projected to reach approximately 0.8-1.0 billion USD in 2025, with an estimated compound annual growth rate (CAGR) of 5%-7% through 2030, driven by expanding global awareness of Middle Eastern and Mediterranean cuisines, growing health consciousness regarding plant-based proteins and healthy fats, increasing ethnic food availability in mainstream retail channels, and rising food service sector adoption for hummus and other tahini-based offerings.

Regional Analysis

The Middle East and Africa region serves as the traditional tahini consumption heartland with estimated stable-to-growing demand at 4%-6%, driven by established cultural and culinary importance, high per-capita consumption across countries including Lebanon, Israel, Palestinian territories, Jordan, Syria, Turkey, and Egypt, and continued population growth. The region demonstrates sophisticated tahini quality preferences with consumers discriminating based on sesame seed origin, roasting levels, and processing methods. Local and regional producers dominate supply with both artisanal operations and larger commercial manufacturers serving diverse market segments. However, political instability in certain countries and economic challenges periodically impact consumption patterns and market development.

Asia Pacific shows substantial growth potential at 6%-8%, primarily driven by China's enormous food service sector utilizing tahini in regional specialties, expanding middle-class consumer purchasing power, and growing awareness of tahini applications beyond traditional uses. China represents both significant consumption and domestic production, with companies including Ruifu Oil & Fat and Luoyang Chunwang operating sesame processing facilities. South Asian countries including India and Pakistan demonstrate traditional sesame paste consumption with regional variants, while Southeast Asian markets show growing interest in Middle Eastern cuisines and plant-based protein sources. Japan and South Korea maintain niche tahini consumption

primarily in international cuisine contexts with premium positioning.

Europe exhibits growth rates of 5%-7%, led by markets in Germany, France, United Kingdom, Netherlands, and Scandinavia where growing Middle Eastern immigrant populations, expanding Mediterranean cuisine popularity, and rising vegetarian and vegan dietary adoption drive increasing tahini consumption. The region demonstrates rapid growth in hummus consumption, which directly drives tahini demand as a primary ingredient. European consumers increasingly purchase tahini for home cooking following exposure through restaurants and prepared foods, while food service expansion incorporates tahini-based sauces and dishes. Regional production remains limited with significant import dependence on Middle Eastern suppliers, though some European manufacturers including specialty food companies develop local production capabilities.

North America follows with growth rates of 6%-8%, dominated by the United States where explosive hummus market growth catalyzes tahini demand. The US hummus market expansion from specialty ethnic food to mainstream refrigerated dip category creates substantial derived demand for tahini as manufacturers require consistent, high-quality supplies. Additionally, growing awareness of tahini as a standalone ingredient for home cooking, expanding Middle Eastern restaurant presence in major metropolitan areas, and rising plant-based dietary trends support direct tahini consumption. Canada demonstrates similar dynamics with particular strength in urban markets with diverse populations. The region relies primarily on imports for tahini supply though some domestic processing operations exist.

South America shows growth potential of 4%-6%, with Brazil and Argentina leading through growing awareness of Middle Eastern cuisines, expanding immigrant populations from Middle Eastern origins, and increasing health consciousness regarding plant-based protein sources. The region demonstrates developing market characteristics with limited current penetration but growing presence in urban retail channels and specialty food stores.

Market Channel Analysis

Online: This retail channel demonstrates projected growth of 7%-9%, reflecting accelerating e-commerce adoption for food products, growing consumer comfort purchasing specialty ingredients online, and COVID-19 pandemic-driven acceleration of online grocery shopping. Online channels enable specialty and artisanal tahini brands to reach consumers beyond traditional retail distribution, provide access to diverse product

varieties including organic and single-origin options, and facilitate consumer education through content marketing and recipe sharing. The channel benefits from subscription models for regular tahini consumers, direct-to-consumer relationships enabling brand building, and ability to serve geographically dispersed populations lacking access to specialty retail. However, shipping costs for heavy paste products and competition from major e-commerce platforms carrying conventional brands create challenges for smaller producers.

Offline: Expected to grow at 4%-6%, this traditional retail channel encompasses supermarkets and hypermarkets, specialty food stores, ethnic grocers, health food retailers, and food service distribution. The offline channel maintains advantages including immediate product availability, ability for consumers to examine products physically, and established shopping patterns particularly among older demographics. Supermarket penetration represents critical success factor for mainstream market development, with tahini placement transitioning from ethnic food aisles to mainstream condiment sections reflecting growing consumer familiarity. Specialty retailers including Middle Eastern grocers and health food stores maintain important roles serving quality-focused consumers seeking premium and artisanal products. Food service distribution supplies restaurants, catering operations, and institutional kitchens, representing substantial volume opportunity as tahini-based menu items proliferate.

The segmentation by sales channel (online vs offline) reflects contemporary retail dynamics but provides limited insight into end-use applications and consumption patterns. More functionally relevant segmentation would examine food service versus retail consumption, traditional ethnic markets versus mainstream Western adoption, or usage occasions including cooking ingredient, condiment, and prepared food component. However, following the specified application framework, the online/offline distinction captures important distribution channel dynamics shaping market access and competitive strategies.

Key Market Players

Prince Tahina: This established Middle Eastern producer likely serves regional markets with traditional tahini production, though specific company information remains limited in accessible sources. The company name suggests positioning emphasizing quality and regional authenticity.

Kevala: The American brand focuses on organic, non-GMO tahini production targeting health-conscious consumers in North American markets. Kevala emphasizes clean

ingredient profiles, sustainable sourcing practices, and premium positioning within natural food retail channels.

Sunshine International Foods: The Michigan-based company operates significant tahini production capacity serving North American markets with both retail and food service products. Sunshine International maintains established relationships with major hummus manufacturers and food service distributors, contributing substantially to US tahini supply. The company processes imported sesame seeds through domestic facilities, providing logistics advantages and consistent quality management.

R.J.M. Food Industries: This Middle Eastern manufacturer produces tahini and sesame-based products serving regional and international markets. The company likely benefits from proximity to sesame seed sources and established regional distribution networks.

Al Wadi Al Akhdar: The Lebanese brand represents traditional Middle Eastern tahini production with emphasis on authentic flavor profiles and quality ingredients. Al Wadi Al Akhdar maintains international distribution including export markets in Europe and North America serving ethnic communities and specialty retailers.

Al Kanater: Another established Middle Eastern producer offering traditional tahini products with regional market focus and growing international presence through export development.

Halwani: The Saudi Arabian food company produces tahini alongside other traditional Middle Eastern food products including halva and confections. Halwani benefits from strong regional brand recognition and distribution infrastructure across Gulf Cooperation Council countries.

Ruifu Oil & Fat: The Chinese edible oil and sesame products company operates sesame processing facilities producing tahini for domestic consumption. Ruifu serves the significant Chinese market for sesame paste used in hotpot, noodle dishes, and other applications, benefiting from large-scale production capabilities and established food industry relationships.

Luoyang Chunwang: This Chinese manufacturer focuses on sesame processing including tahini production serving domestic food service and retail channels. The company benefits from proximity to sesame cultivation regions and cost-competitive production infrastructure.

Industry Value Chain Analysis

The tahini industry value chain extends from sesame seed cultivation through processing and distribution to diverse end-use applications. Upstream operations involve sesame farming across tropical and subtropical regions globally, with major production concentrated in India, China, Sudan, Myanmar, and Tanzania. Sesame cultivation demonstrates relatively low input requirements, drought tolerance, and suitability for smallholder farming systems, though mechanization challenges and labor-intensive harvesting create production constraints in some regions. Global sesame seed supply demonstrates commodity characteristics with international trading, quality grading systems, and price volatility influenced by weather conditions and production volumes.

Sesame seed processing begins with cleaning and dehulling for white tahini production or direct processing for unhulled variants. Dehulling traditionally employed water soaking and physical separation methods, while modern operations utilize mechanical dehulling systems improving efficiency and product consistency. Roasting represents a critical process step dramatically impacting final tahini flavor profile, with temperature, duration, and seed moisture content requiring careful control achieving desired taste characteristics. Roasting processes range from traditional pan-roasting in small batches to continuous industrial roasting systems for large-scale production.

Grinding constitutes the core tahini manufacturing step, with stone mills traditionally preferred for producing smooth, creamy texture through gradual particle size reduction and heat generation aiding oil release. Modern production employs various grinding technologies including stone mills for artisanal and premium products, metal grinders for industrial-scale production, and colloid mills achieving very fine particle sizes. Multiple grinding passes typically produce optimal consistency, with process parameters including grinding speed, temperature management, and residence time influencing final product texture and quality.

Oil separation represents a key challenge, as excessive oil release during or after grinding creates product instability and separation in storage. Proper grinding techniques balance thorough sesame seed breakdown with controlling oil release, while some manufacturers add back sesame oil to achieve target consistency and stability. Product formulation may include minor additions of salt, though authentic tahini generally contains only sesame seeds.

Packaging utilizes glass jars for retail products emphasizing quality and shelf

presentation, plastic containers for cost-effective retail packaging, and bulk containers including pails and drums for food service and industrial customers. Packaging must address oil separation tendencies with appropriate labeling instructing consumers to stir before use, while some manufacturers employ stabilizers or modified processing to reduce separation.

Distribution channels encompass specialized importers and distributors serving ethnic retail and food service segments, natural and specialty food distributors reaching health food stores and premium retailers, mainstream food distributors supplying supermarket chains, and food service distributors serving restaurants and institutional operations. Cold chain management generally not required for tahini given ambient storage stability, though temperature control during shipping and storage helps maintain quality and prevent rancidity.

End applications span retail consumption for home cooking and direct consumption, food service utilization in restaurants preparing hummus, Middle Eastern specialties, and contemporary fusion dishes incorporating tahini, and food manufacturing as an ingredient in prepared hummus, sauces, dressings, and confections. The industry demonstrates increasing vertical integration with major hummus manufacturers developing internal tahini production capabilities ensuring supply security and quality control, while smaller restaurant and retail operations typically purchase finished tahini from specialized suppliers.

Market Opportunities and Challenges

Opportunities

Hummus Market Growth Spillover: Explosive hummus consumption growth in Western markets directly drives tahini demand as hummus manufacturers require consistent, large-volume tahini supplies. The hummus category transformed from ethnic specialty to mainstream refrigerated dip competing with salsa and other conventional products, creating unprecedented tahini volume requirements. Continued hummus market expansion and product innovation including flavored varieties and portable packaging formats ensure sustained tahini demand growth.

Plant-Based Dietary Trend Alignment: Tahini's profile as a nutrient-dense, plant-based protein and healthy fat source positions the product advantageously amid growing vegetarian, vegan, and flexitarian dietary adoption. Tahini provides

complete protein when combined with complementary plant proteins, offers heart-healthy monounsaturated and polyunsaturated fats, and contains beneficial minerals including calcium, iron, and magnesium. Marketing emphasizing nutritional benefits and sustainability of plant-based foods supports tahini consumption growth beyond traditional ethnic food contexts.

Culinary Exploration and Ethnic Food Mainstreaming: Growing consumer interest in authentic global cuisines, cooking show and social media exposure driving culinary experimentation, and increasing comfort with previously unfamiliar ingredients create opportunities for tahini usage expansion. Recipe developers and food bloggers promote tahini applications beyond traditional Middle Eastern dishes, including salad dressings, smoothies, baked goods, and fusion preparations, broadening consumer awareness and usage occasions.

Premium and Specialty Product Segments: Artisanal tahini producers emphasizing single-origin sesame seeds, specific roasting profiles, organic certification, and traditional processing methods command premium pricing from quality-focused consumers. The specialty segment demonstrates strong growth driven by consumers valuing authenticity, transparency, and superior flavor, supporting profitability for smaller producers unable to compete on commodity pricing. Direct-to-consumer channels including online sales and farmers markets enable specialty producers to reach target consumers and communicate value propositions effectively.

Challenges

Raw Material Price Volatility and Supply Uncertainties: Sesame seed production vulnerability to weather conditions, crop disease, and regional political instability creates price volatility and occasional supply constraints impacting tahini manufacturers. Sesame seed prices demonstrate significant variation based on annual harvest results, with poor growing seasons or production disruptions in major sourcing regions causing sharp price increases. Tahini producers face challenges managing raw material costs while maintaining retail price stability, particularly for brands competing in mainstream grocery channels with limited pricing flexibility.

Quality Consistency and Rancidity Management: Sesame seeds' high oil content creates susceptibility to oxidative rancidity, particularly with extended

storage or exposure to heat, light, or oxygen. Maintaining tahini freshness throughout supply chains from production through retail sale and consumer usage requires careful processing, appropriate packaging, and proper handling. Quality inconsistencies arising from variable sesame seed inputs, processing variations, or storage conditions undermine brand reputation and consumer confidence. Smaller producers particularly face challenges implementing comprehensive quality management systems and ensuring proper rotation of inventory.

Competition from Alternative Nut and Seed Butters: Tahini competes with diverse nut and seed butter options including peanut butter, almond butter, sunflower seed butter, and others for consumer attention and pantry space. While tahini offers unique flavor profiles and cultural associations, unfamiliarity among mainstream Western consumers creates adoption barriers relative to conventional alternatives. Positioning tahini requires effective consumer education while justifying premium pricing compared to peanut butter and other established products.

Market Fragmentation and Brand Recognition Challenges: The tahini market demonstrates significant fragmentation with numerous small and regional producers alongside growing presence of mainstream food companies entering the category. Building brand recognition and consumer loyalty remains difficult given limited marketing budgets for smaller specialty producers and intense competition for retail shelf space. Private label tahini offerings from major retailers further intensify price competition and challenge brand differentiation.

Trump Administration Tariff Policy Uncertainty and Global Supply Chain Restructuring: Current trade policy developments under the Trump Administration create uncertainty for the tahini market, which depends on global sesame seed trade flows connecting producing regions in Asia and Africa with processing facilities and consumption markets worldwide. The April 2025 'Liberation Day Tariffs' implementing duties including 10% on imports from China and 26% on imports from India directly impact sesame seed costs, processing equipment availability, and packaging material expenses for US-based tahini manufacturers. While sesame seeds originate from diverse global sources including Sudan, Myanmar, and Tanzania potentially mitigating country-specific tariff exposure, processing concentration in certain regions and trade routing through tariff-impacted countries creates indirect cost pressures. For Chinese tahini producers including Ruifu Oil & Fat and Luoyang Chunwang

potentially exporting to Western markets, tariffs on finished goods limit competitiveness despite domestic production cost advantages. Conversely, US-based processors including Sunshine International Foods potentially benefit from protected domestic markets if tariffs disadvantage imported tahini, though higher input costs for imported sesame seeds may offset advantages. Middle Eastern producers serving both regional and export markets face complex dynamics with potential tariff exposure on US-bound shipments while maintaining cost competitiveness in home regions and alternative export destinations. The specialty food sector's dependence on imported products and diverse global supply chains creates particular vulnerability to trade policy disruptions, with small tahini brands lacking resources to navigate complex customs classifications, document country-of-origin requirements, or develop alternative sourcing strategies. Sesame seed sourcing diversification across multiple origin countries provides some hedge against single-country tariff exposure but complicates quality management and requires expanded supplier relationships and verification systems. Market participants must monitor evolving trade policy developments, evaluate production location strategies, and consider supply chain adjustments balancing tariff mitigation against processing expertise, quality control capabilities, and total landed costs. The relatively low profile of tahini in policy discussions compared to major commodity foods suggests limited prospects for specific exemptions, necessitating market-driven adaptation strategies by industry participants navigating the uncertain trade environment.

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