

The European market potential for fonio

Fonio is so new to the European market, that it only recently received an official authorisation to be marketed as a food product in Europe. There is a potential market for fonio as a nutritious, ancient grain and as an interesting replacement for wheat. Demand for gluten-free grains and bakery products suggests Italy, France, Germany, United Kingdom, the Netherlands and Belgium offer most potential.

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1. Product description

Fonio or white fonio (*Digitaria exilis*) is a small gluten-free grain (1-1.5mm) similar to millet and a very common crop in West Africa and in the Sahel region, at the southern edge of the Sahara desert. The black fonio (*Digitaria iburua*) variety, which is mainly cultivated in Niger, Nigeria, Benin and Togo, is less common and the grains are even smaller than white fonio.

Husked fonio is eaten like rice and couscous, used to make porridge and beer or milled into flour for baking. Among fonio's advantages, it can be cultivated in semi-arid areas with poor soils and reaches maturity in six to eight weeks. However, the lack of modern post-harvest technologies and the size of the grain makes it labour intensive and difficult to process.

Processing steps for fonio:

- threshing
- winnowing, cleaning and sorting
- hulling
- processing, for example, milling, pre-cooking or parboiling

Several mechanisation trials to make fonio post-harvest and processing easier have been done. You can read about some of them in [the CIRAD publication *Fonio, an African cereal*](#), from page 83 onwards.

Fonio has had its own code in the Harmonised System (HS), HS 100840, since 2012.

In December 2018, the European Commission approved the commercialisation of decorticated fonio grains, that is, having their bran removed, in Europe as a [novel food](#) under [implementing regulation \(EU\) 2018/2016](#).

2. What makes Europe an interesting market for fonio?

European fonio imports expected to increase after authorisation

There is no previous history of fonio use in Europe. Since December 2018, fonio has been officially recognised as a traditional food from a third country and approved as a novel food product in Europe.

Even before the authorisation, European buyers imported minor volumes of fonio between 33 and 172 tonnes annually starting in 2012. These smaller volumes were most likely used for testing, product development, small-scale or ethnic consumption.

After being authorised for human consumption as a novel food in the EU, it is very likely that imports will

increase, as interest from food companies grows.

Important to know: Fonio is new and unknown

A European market for fonio has yet to be developed. For most consumers, fonio is still an unknown grain type. In this preliminary stage, investment in marketing is relatively high. Potential opportunities for fonio can be based on market characteristics and trends, but they remain highly hypothetical.

Tip:
Introduce fonio to potential buyers, for example, at specialised fairs, such as the [Free From Expo](#) in the Netherlands and the bakery trade fair [iba](#) in Germany, or at one of the major international food trade fairs, such as [Food ingredients Europe](#), [Health ingredients Europe](#), [SIAL](#), [Anuga](#) and [BioFach](#) (organic).

Usability and grain comparison predict positive future for fonio in Europe

Industry sources describe [fonio flour as a very workable and strong flour](#). It is also gluten free, which makes it interesting for coeliac disease patients and gluten-intolerant consumers. This puts it on a par with other specialty, gluten-free and pseudo grains, such as millet, quinoa, amaranth, teff and buckwheat.

The more than 35 thousand tonnes in imports make millet one of the most imported gluten-free grains in Europe. But it is also a low-value product that only reaches human consumption in minor volumes. Quinoa and buckwheat are more used in food applications and have import volumes between 25 and 30 thousand tonnes.

To measure its market potential, [fonio has been regularly compared with quinoa](#), much in the same way [teff](#) has too. If fonio is promoted and picked up by the European consumer like quinoa, fonio could grow exponentially. However, like many of these new grains, fonio also has many challenges to overcome.

Table 1: European fonio imports versus other specialty grains 2018

		all origins	From non-EU origin	
Special grain	Description	In euro thousands	In euro thousands	In tonnes
Quinoa	gluten-free pseudo cereal	90,497	51,962	26,254
other cereals	including teff, amaranth, etc.*	68,115	14,723	6,991
Millet	small-seeded grass variety for feed and human food	40,133	13,581	35,120

Buckwheat	gluten-free pseudo cereal	46,466	6,973	29,917
Fonio	'Novel food' gluten-free grain	172	81	104

*excluding wheat and maslin, rye, barley, oats, maize, rice, grain sorghum, buckwheat, millet, canary seeds, fonio, quinoa and triticale

Sources: ITC Trade Map, Eurostat, Market Access Database

Important to know: new hyped export products are risky

New products that are highly promoted often end in an unnaturally inflated price, followed by large overproduction, eventually resulting in big losses for producers or exporters. One advantage of fonio in this respect is its relatively large existing local consumption in Africa, but as a supplier you must be aware of the risks for if and when fonio becomes a new hyped export product.

Tips:

Plan your production: before producing or processing larger fonio volumes for export, first find adequate buyers for your product.

Find your buyers on trade fair exhibitor lists, trade association member lists, such as [COCERAL's](#), and company databases, such as [food-companies.com](#) and [EUROPAGES](#).

Crop combinations can facilitate fonio trade

European importers in general are not keen on taking risks. Demand for fonio is still very small, so buyers likely prefer dealing with small volumes. It can be interesting for them to start importing fonio in combination with other crops. By combining crops you can make the fonio trade less risky for buyers.

In Africa, [fonio is ideally intercropped with other semi-arid tropical cereals and pulses](#), such as sorghum, groundnuts, cowpeas, pigeon peas and sesame. For example, Nigeria exported 18.4 thousand tonnes of sesame seeds to Europe in 2018, Togo supplied around one thousand tonnes of ground nuts mostly to France and Belgium, while Benin and Niger exported smaller volumes up to 300 tonnes of cowpeas to Europe.

Important to know: No reliable production, no end market

The success of fonio in Europe will depend on how it is managed as an export product. Buyers can become interested if fonio is a feasible product for sourcing and worth the effort to promote.

The main challenges for fonio are the manual labour involved in processing the tiny seeds and the producers' lack of experience with the strict requirements of the European food industry. [Smallholders often lack the capacity to keep up with large harvests](#), as well as proper equipment and food safety management systems.

Buyers need to be assured of reliable supplies and processing up to European standards. If the supply is not reliable or not compliant with European standards, there is no potential for a durable growth of fonio in Europe.

Tips:

Include a portfolio of different types of grains, seeds and pulses in your export strategy. This will help you diversify your assortment to buyers, reducing dependency on a single export product. It will also help to have previous experience exporting other more established products before going into fonio.

Be well prepared when offering fonio as a new product to buyers: Buyers will expect you to know your product and present all necessary details including samples, supply conditions, price information, export volumes and production process.

3. Which European countries offer most opportunities for fonio?

The most promising markets for fonio are Italy, France, Germany, United Kingdom, Netherlands and Belgium. In France and Italy, fonio is already being promoted. Germany and the United Kingdom may offer more opportunities in the long term. To determine the potential for fonio, look at the size of the gluten-free market, the bakery sector and the import data for fonio and other specialty grains.

Table 2: Overview of comparable data relevant to fonio

	Quinoa imports (HS100850) 2018, in tonnes	Imports of other grains (HS100890) 2018, in tonnes	Bread and bakery revenues 2019, in billion euros	Share of global gluten-free sales 2014	Share of global gluten-free sales 2015
Italy	3,302	6,071	16	13%	10%
France	8,088	6,551	12	3%	
Germany	5,775	4,378	21	8%	7%
United Kingdom	4,046	1,880	20	9%	15%
Netherlands	4,702	31342	4		
Belgium	2,745	14450	2		

Sources: ITC Trade Map, Statista, [Euromonitor](#)

Italy

Italy offers good potential prospects for fonio, indicating it could be a good country for a first target market. Having a large wheat-based industry, there is interest in gluten-free products in the Italian market.

The application to authorise fonio as a novel food in Europe came from the Italian [Obà food group](#), which assessed the Italian market and the potential of fonio. Obà serves both the consumer and the business-to-business market with fonio grains and flour, a type of company that can be crucial in the promotion of fonio as a new ingredient.

Among the first European countries to adopt fonio, Italy has a large industry that works with wheat for bread, pizzas and pastas. But the country is also among the largest European markets for gluten-free products. In 2014, [Italy accounted for 13% of the global sales of gluten-free products](#) and 29% of gluten-free pasta sales. One of the leading Italian brands of gluten-free products is [Schär](#).

Tip:

Check the trade fairs [Tuttofood](#) and [FoodNova](#) where producers of gluten-free products exhibit and the gluten-free sector often has a dedicated space.

France

A well-developed organic grain market and ethnic consumer group may offer opportunities for the future development of a market for fonio in France.

One of the pioneers to introduce quinoa in Europe and now its leading importer (see figure 2), France can also be an interesting starting market for fonio. Quinoa and fonio share many similarities : both are ancient or ancestral grains valued for their nutritional value and have a traditional production of smallholder farms. But remember that quinoa gained traction in France in the organic food market. French company [Gaia](#), for example, is already selling several organic and fair-trade certified fonio products.

France was the leading European importing country of fonio in the last three years (2016-2018), which was previously the position of Belgium, Italy and the Netherlands.

France also has an advantage with a possible ethnic demand because of its close relation with French-speaking African countries. [More than 160 thousand citizens of Mali, Senegal and Guinea](#) live in France, a consumer group that may be already familiar with fonio.

Tip:

Verify if your product already or mostly complies with the [European standards of organic agriculture](#). Check with a recognised control body and get your product certified, if possible, since France could be an interesting pioneer market for organic fonio.

Germany

German fonio imports are still negligible, but it is potentially your largest market in Europe. Germany not only has Europe's largest population, but it also hosts a mature bakery sector which can form a basis for fonio in the future.

Germany is market leader in bakery products, with a bread and bakery industry worth more than €21 billion.

There is a [variety of nearly 3,200 different breads](#) in Germany, where bread culture is so strong it has been included in the UNESCO world heritage list.

Consumers in Germany have a growing interest in ancient grains and bakery products with nutritious grains added. Millet, spelt, emmer, einkorn and quinoa are already widely used in the country. In 2016, [a third of Germans ate quinoa and almost 48% consumed other ancient grains](#), such as millet and spelt. Fonio would fit perfectly in the range of 'supergrains'.

Tip:

Find relevant German and international companies in the bakery industry in the [exhibitor list of iba](#), the leading trade fair in Germany for the bakery, pastry and snack trade.

United Kingdom

The United Kingdom is a strong innovator in healthy cereals. Fonio exporters can try to find opportunities in dominant food segments, such as gluten-free and healthy cereal snacks.

Imports of alternative non-wheat cereal flours went up from 7.7 thousand tonnes in 2014 to 31.7 thousand tonnes in 2018. The demand for specialty grains comes from an innovative food industry and well-developed market for healthy cereal snacks, such as biscuits. These grains cater to a large number of consumers that seek convenient, nutritious and high-fibre products.

The gluten-free segment is particularly important within healthy grains. The United Kingdom was a leading market in gluten-free sales in 2015, which has only grown in importance. The UK has the second-largest population in Europe and approximately [one per cent of consumers with Coeliac disease](#). An estimated [13% of people in the UK need to avoid gluten altogether](#), meaning the gluten-free market targets 660 thousand coeliac disease patients and 8.6 million people who avoid gluten in their diets.

Tip:

Read the information about exporting healthy snacks with grains, pulses and oilseeds to Europe on the CBI market information platform.

Netherlands

The Netherlands is often a quick adopter of new food products. This can be used to your advantage to market your fonio grains through Dutch trade channels.

The reason that new products are easily adopted in the Netherlands is because it is a trade hub for many food products in Europe. A relatively high volume of specialty grains, such as quinoa, is imported and distributed through the Netherlands, where the biggest European seaport, Rotterdam, is connected to an extensive logistical infrastructure taking products to other destinations throughout Europe.

When the fonio market in Europe expands, you can expect Dutch traders to play a significant role in re-exporting the grain to different neighbouring countries.

Tip:

Read more about the importance of the trade in the Netherlands in the publication [Dutch trade in grains, seeds and pulses](#).

Belgium

As an exporter, it is important for you to understand the double role Belgium plays in processing and re-exporting.

Belgium has a similar distribution function as the Netherlands: a large entry port for grains. However, Belgium also offers a much larger grain milling industry than the Netherlands and many other European countries. [Belgium has an estimated 100 to 150 mills](#) that process grains, mainly wheat, into flour, compared to a handful Dutch companies.

According to trade statistics, Belgium has been the most important fonio importer in Europe in the period of 2012 to 2018. When the Belgian fonio market further develops, there could be a significant demand from traditional grain millers, which will most likely purchase whole fonio grains.

Tip:

Find flour millers on the website of the [Belgian milling association KVBM-ARMB](#). You can find other national flour milling associations on [Flourmillers.eu](#).

4. What trends create opportunities or risks in the European fonio market?

Ancient grains are attractive for consumers

Fonio can be placed in the category of ancient grains, which are commonly defined as [grains or pseudo cereals that are largely unchanged over the last several hundred years](#). These include for example einkorn, emmer, spelt, quinoa and teff.

When promoting ancient grains, it is important to highlight the story behind the product. The term ancient grain has become a common marketing concept for specialty and traditional grains. The story of traditional consumption combined with nutritional characteristics make these grains attractive for European consumers, who increasingly seek authenticity and healthy foods.

The following products in the European market include ancient grains in their formulations, for example:

- [Fonio Obà grain](#)
- [Gaia Fonio grains and flour](#), organic and fair-trade
- [Doves Farm ancient grain flour](#), including spelt, emmer, einkorn, quinoa, teff, buckwheat, etc.
- [Nairn's ancient grain oatcakes](#) with oats, rye, amaranth and quinoa
- [Brinta ancient grains porridge](#) with rye, oats, barley, wheat and spelt
- [Edeka ancient grain bread](#) made from spelt and emmer grains
- [Eat Natural gluten-free ancient grains breakfast cereal](#) with oats, buckwheat, amaranth, quinoa and chia

Tip:

Tell the story behind your product when selling fonio to the European market. Highlight the history of the grain, the nutritional benefits, the traditional production by small farmers and the long-term value in the local culture.

Potential for organic superfood

Superfood and supergrain have become regular marketing terms in Europe for all grains that provide additional nutritional benefits. Fonio has the potential to be marketed as a supergrain too. Its nutritional composition offers more protein and fibre than brown rice and couscous or durum wheat, and has a lower value on the [glycaemic index](#), the speed in which it increases blood glucose level.

Providing nutritional information will help fonio to get adopted by brands that want to promote health or make a product appear healthier. Consumers in Europe increasingly seek information about the food they eat. As awareness of nutrition grows, people look for healthy food alternatives and ingredients for specific dietary needs. Fonio can offer a solution for popular dietary choices, such as vegan, gluten-free and low-glucose. By promoting these aspects, fonio can be placed together with other more established supergrains, such as quinoa, amaranth and teff.

Tips:

Aim for companies that are most involved with food for specific consumer groups and consumers with special dietary needs, for example organic traders and gluten-free specialists.

Promote awareness of fonio by getting grain specialists involved. For example, get the attention of experts and members of the [Healthgrain Forum](#) and seek their support in advocating fonio as a healthy grain.

Read more about [the trends for grains, pulses and oilseeds on the CBI market information platform](#).

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