



CBI
Ministry of Foreign Affairs

CBI Product Factsheet:

Teff in Europe

Introduction

Teff is often referred to as one of the ancient grains. It is also one of the smallest ethnic grains and a staple food in Ethiopia. Teff was initially exported to supply Ethiopians living abroad, but it has caught the interest of many other consumers in Europe. Its nutritional value and the fact that it is gluten-free make teff very suitable as a healthy food ingredient to meet the increasing demand for such products.

Product description

Teff (*Eragrostis tef*) is a grain crop and part of the family of true grasses (*Poaceae*), similar to millet. The grains are coloured from ivory to reddish brown and are very small (0.5-1 mm). Around 3,000 grains of teff weigh no more than one gram. Teff is processed as a whole grain because of its small size.

Teff finds its origin in Ethiopia, where it is a staple crop and often used for *injera*, a local type of flat bread. In South Africa and Australia, teff grass is used as forage. Teff is milled and consumed as an alternative to regular wheat flour in many other countries, such as the USA and increasingly in European countries. Teff is high in protein and minerals, and is suitable for the gluten-free market.

Table 1: Combined Nomenclature (CN) Code for Teff among other cereals, hereafter also referred to as niche cereals

Statistical Number	Product
1008.90.00 (from 2012)	CEREALS (EXCL. WHEAT AND MESLIN, RYE, BARLEY, OATS, MAIZE, RICE, BUCKWHEAT, MILLET, CANARY SEED AND GRAIN SORGHUM)
1008.90.90 (until 2012)	CEREALS (EXCL. WHEAT AND MESLIN, RYE, BARLEY, OATS, MAIZE, RICE, BUCKWHEAT, MILLET, CANARY SEED, TRITICALE AND GRAIN SORGHUM)

Source: Eurostat (Comext)

Product specifications

No marketing standards are as yet available for the commercialisation of teff. The [Codex Alimentarius Commission](#) (CAC) lists marketing standards for other [cereals, pulses, legumes and vegetable proteins](#), including millet and wheat. These standards can serve as a reference for niche grains such as teff.

Apart from the content of contaminants, such as mycotoxins, pesticides and heavy metals, which must be within statutory limits, the properties of teff that may be of interest include the purity level, moisture level, colour sorting, grain conformity, absence of foreign matter or abnormalities and nutritional value (e.g. protein content). An [example of the product specification](#) of teff may be found on the website www.teff-international.com.

Buyers often require samples, which should be representative of the product delivered.

Labelling

Labelling must comply with the regulations applying to the European market. Read more about [food labelling on the EU Export Helpdesk](#) and in [EU Regulation 1169/2011](#) on the information to consumers. The provision of nutritional information will also be made compulsory with effect from December 2016.

The following items should be on the label of a teff product:

- Official product name
- Physical condition or treatment
- List of ingredients and allergens
- Class, size (code), number of batches, net weight in metric units
- Statement that the product is destined for human consumption
- Best-before date or use-by date
- Instructions or special conditions for storage or use
- Place of origin or provenance
- Name and address of the importer established in the EU
- Name and address of exporter
- Lot marking on pre-packaged foodstuffs (to ensure traceability of individual batches)

In addition, the label should include any certification logo (if applicable) and/or retailer logo (in the case of products marketed under a private label).

English is often used for bulk labelling, unless your buyer indicates otherwise. Multilingual labels are commonly used on consumer packaging, but the language of the destination country must be included in any case.

Packaging and handling

There is no packaging standard for teff. It is important to have reliable packaging for the small teff seeds. Polypropylene or strong kraft paper bags with a capacity of 25 kg are often used, while teff flour is usually packaged in paper bags. Different buyers may have different preferences. If you want to use unconventional forms of packaging, you should take [EU legislation for food contact materials](#) into account.

What is the demand for teff in Europe?

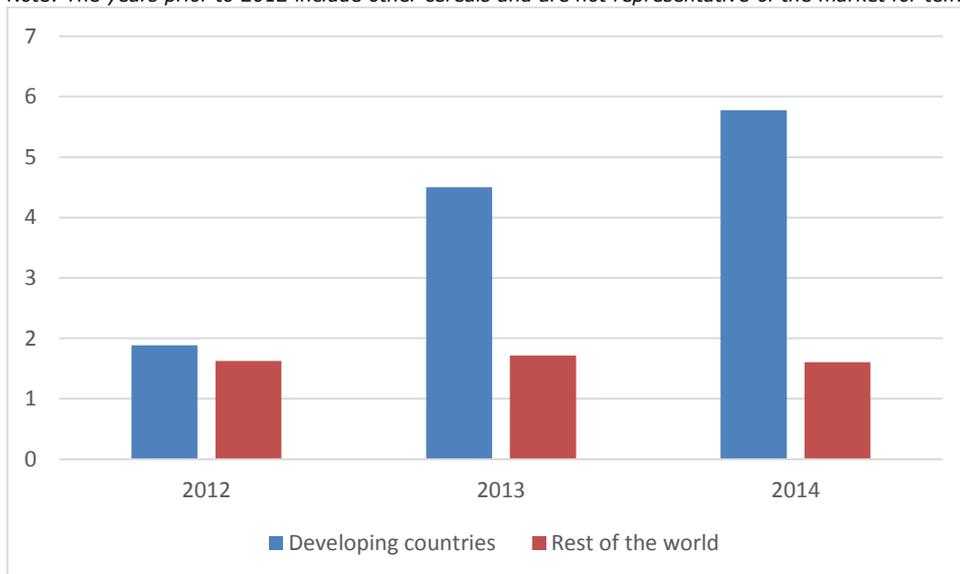
General information about the demand for grains and pulses in the European market is provided in [CBI Trade Statistics](#) on the [CBI Market Intelligence Platform](#). The present section gives more detailed statistics about teff trade and consumption in Europe.

Note: There are no specific statistics for teff. For statistical purposes, teff is categorised together with other niche cereals or pseudo cereals, such as amaranth and cañihua.

Import

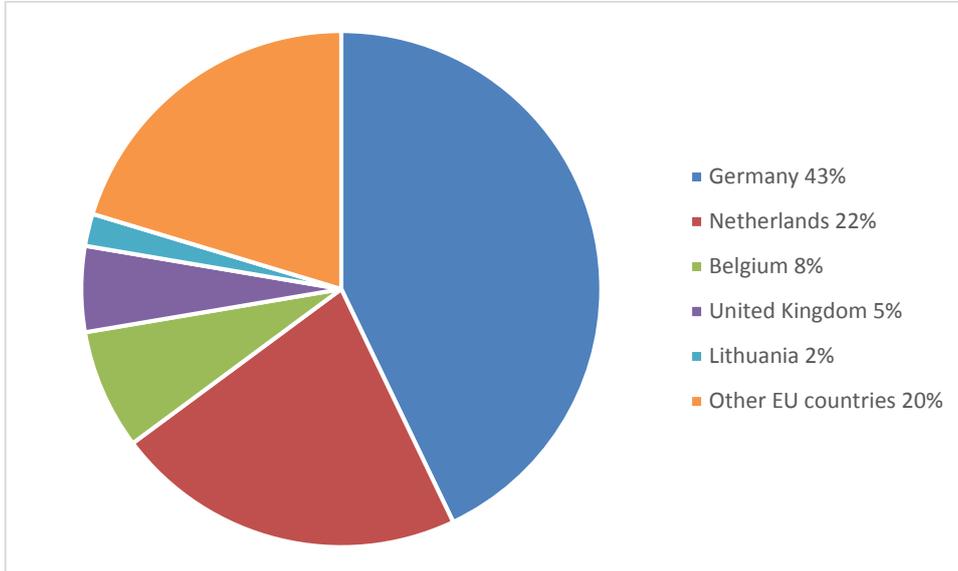
Figure 1: EU import of niche cereal grains, including teff and amaranth (HS 100890) from non-EU countries, in 1,000 tonnes

Note: The years prior to 2012 include other cereals and are not representative of the market for teff.



Source: [Market Access Database](#) (Comext)

Figure 2: EU import volume of niche cereal grains (HS 100890) in 2014, share per country. Only extra-EU trade



Source: [Market Access Database](#) (Comext)

Interpretation and opportunities

- Forecasts indicate that European imports of teff may grow in the years to come, in line with the observed trends for the imports of similar grains. EU imports of niche cereals, including amaranth and teff, rose from 3.5 thousand tonnes in 2012 to 7.4 thousand tonnes in 2014. Although there are no reliable statistics on teff, the trade of other ancient grains provide a good indication of the growth path to be expected for teff:
- EU imports of millet, another gluten-free grain, rose from 52 thousand tonnes in 2012 to 56 thousand tonnes in 2014, while quinoa imports in the EU rose from 5.8 thousand tonnes in 2012 to 15 thousand tonnes in 2014.
- The principal EU countries importing niche cereals from outside the EU are Germany (3,166 tonnes) and the Netherlands (1,615 tonnes). Germany imports mainly from India, followed by Peru and the USA, while the Netherlands imports mainly from India and South Africa. Together, these two countries are responsible for 65% of the EU import of niche cereals from non-EU countries.
- Ethiopia originally started to export teff to Ethiopians who were living abroad in countries such as Israel, Djibouti, the United Arab Emirates and Yemen. Despite the growing demand in the USA and Europe, Ethiopia has not become the main exporter to these markets. In order to avoid extreme local prices for one of its main staple crops, Ethiopia decided to ban the export of teff in 2006. Only recently have there been concrete plans to organise sustainable cultivation of teff for export purposes. The main difficulty for Ethiopia now is that the EU has strict food safety regulations, with stringent traceability and logistics requirements on imports.

Another restriction for Ethiopia has been a broad patent agreement since 2005 with a Dutch company for 12 Ethiopian varieties of teff and the development of teff products in several EU countries. The bankruptcy of this company resulted in the end of the cooperation, but the patent was transferred to another company and remains active.

- According to [Ethiopian sources](#), the USA, Spain, India, South Africa, Uganda and Cameroon are among the main exporters of teff.

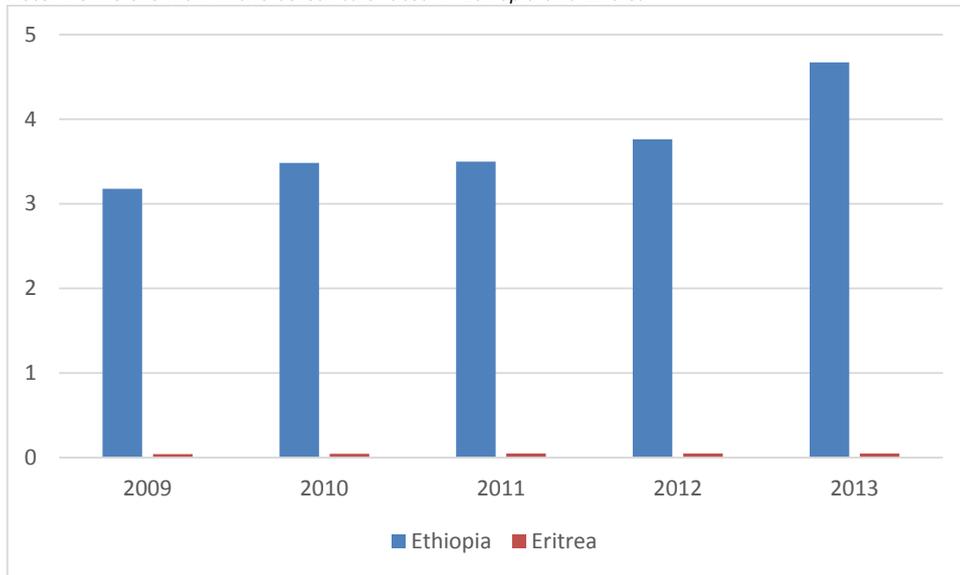
Tips:

- Select your target market carefully: Germany is an important consumer market, the Netherlands can be an interesting trade hub and Spain is building experience in the production and sale of teff.

Production

Figure 6: Production of niche cereals in Ethiopia and Eritrea, in million tonnes

Note: Teff is the main niche cereal cultivated in Ethiopia and Eritrea



Source: [FAOSTAT](#)

Interpretation and opportunities

- Ethiopia produces more teff than anywhere else in the world, and its production is still increasing year-on-year. Around 6 million Ethiopian farmers are involved in the cultivation of over 4 million tonnes of teff. The production in the neighbouring country of Eritrea is much smaller, but still significant on a worldwide scale. Local Ethiopian prices for teff have risen compared with those for other large crops, such as maize. This provides more incentive to cultivate teff as a cash crop.
- Commercial production has also been picked up by the USA, South Africa and European countries.

Tips:

- Check the suitability of your climate for the production of teff. A climate that requires few pesticides has a better chance of complying with strict EU legislation.
- Keep up to date on consumption trends and new products in order to identify new target groups. Shops or online retailers can be good sources of such information.

What trends offer opportunities on the European market for teff?

General information on trends in grains and pulses in the European market is provided in the [CBI Trends](#) page on the [CBI Market Intelligence Platform](#). The present section deals with specific trends concerning teff in Europe.

Interest in new, authentic food:

Many European consumers are prepared to try out "new" products. The story behind teff, depicting it as an ancient grain from Ethiopia, will appeal to food journalists and curious consumers alike. Although still a niche product, teff is often referred to as the next traditional superfood.

Teff popular as a gluten-free health food:

A growing number of consumers in Europe are increasingly aware of the need for a healthy diet. This health trend is associated with an annual increase in the demand for gluten-free products in Europe. The UK is the leading market for gluten-free food, while Italy, Germany, the Nordic countries and Poland (now an emerging gluten-free market) are also major consumers of products such as teff. Other special grains such as quinoa and amaranth have also become popular ingredients in, for example, bakery and breakfast products in the EU. A similar growth path may be expected for teff, which is ideally placed to meet the growing demand for healthy, gluten-free grain products.

Organic is important:

Increased attention to health, environmental and social responsibility is leading to rapid growth of the organic sector. Teff is regarded as a healthy food and has a potential for growth in the organic food segment. Health shops and organic grocery stores often include teff or teff products in the range of products they carry.

Tips:

- Keep up to date on new food trends in Europe by visiting news websites, such as [Food Navigator](#), [Organic & Wellness News](#) and [Food Manufacture](#).
- If possible, create a good story on your product, including information on such aspects as its origin, social impact and traditional cultivation.

What requirements should teff comply with to be allowed on the European market?

General information on buyer requirements for grains and pulses in the European market is available in [CBI Buyer Requirements](#) on the [CBI Market Intelligence Platform](#). The present section deals with specific requirements applying to teff and similar grains in Europe.

What legal and non-legal requirements must my product comply with?

Food safety:

The [General Food Law](#), which regulates food safety in the EU, also applies to teff. Suppliers must make sure that teff exports are traceable and that safety systems (such as HACCP) are in place.

Contaminants:

The maximum permissible levels of contaminants, such as heavy metals and mycotoxins, are laid down in [EU Regulation 1881/2006](#). All the provisions of this regulation that apply to cereal-based products are also relevant to teff.

Maximum Residue Limits:

The maximum residue limits (MRLs) for pesticides that might be used on teff can be found in the [EU Pesticide Database](#). Use of "teff" or "common millet / proso millet" and the type of pesticide as search terms will yield the corresponding MRLs. Maximum residue levels are also laid down in [EU Regulation 396/2005](#). You should be aware that the MRL requirements for organic teff are much more stringent.

Tips:

- Read the [EU Factsheet on contaminants](#) and the [EU Factsheet on new rules on pesticide residues in food](#).
- Take extra precaution with organically produced teff. Avoid the use of any chemical pesticide and cross-contamination.
- Find out about the general export requirements for teff by consulting the [Export Helpdesk](#): fill in the product code for niche cereals (10089000), the country of origin and the destination of the teff to find the information required.

What additional requirements do buyers often have?

Organic certification:

Offering organically cultivated teff will be a popular move in the health food sector. You need to use organic production methods as laid down in [EU legislation](#) in order to market organic teff in the EU.

Note: The European Commission proposed [new rules for organic farming](#) in 2014, as part of its future policy framework.

Tips:

- Read about organic farming and guidelines in Europe on the [EU website on organic farming](#).
- You can find importers who specialise in organic products through directories, such as the *International directory of organic food wholesale & supply companies* ([Organic-bio](#)), or at special trade fairs for organic products such as [Biofach](#) in Germany.

Food safety certification:

As food safety is a top priority in all EU food sectors, you can expect most buyers to request extra guarantees from you in the form of certification. Food management systems and certifications that are recognised by the Global Food Safety Initiative ([GFSI](#)) are widely accepted throughout Europe.

If you are a supplier of teff, you may find one of the following certification schemes useful, depending on the role you play in the supply chain (production, distribution or processing): [GLOBALG.A.P.](#), [Food Safety System Certification 22000](#) (ISO 22000), [BRC Global Standard for Food Safety](#) (British Retail Consortium) and [IFS Food Standard](#) (International Featured Standard).

Tips:

- Use the [ITC Standards Map](#) or the [GFSI website](#) to learn about the different food safety management systems, hygiene standards and certification schemes.
- Check with your buyer to determine which certification scheme is most relevant for your target market.

Social compliance & sustainability:

EU buyers are paying increasing attention to their corporate responsibilities concerning the social and environmental impact of their business. Programmes and initiatives that facilitate social compliance include the *Business Social Compliance Initiative* ([BSCI](#)), the *Ethical Trading Initiative* ([ETI](#)) and the *Global Social Compliance Programme* ([GSCP](#)). New health ingredients, such as teff, typically attract a great deal of attention in the food media, thus being more susceptible for both the positive and the negative sides its commercialization. It is best to prevent bad publicity up front by being completely transparent and complying with social and environmental requirements.

Tip:

- Check your company's current performance, for example, by performing a self-assessment. Details of how to do this may be found on the [BSCI website](#).

What are the requirements for niche markets?

Fair trade and environmental certification

Fair trade and sustainable certification, such as [Fair for Life](#), [Rainforest Alliance](#) and [Fairtrade](#), is still a niche requirement for teff, but it can help your product to stand out from the mass of competitors and attract consumers who are more aware of these issues.

Tip:

- Find a specialised European buyer who is familiar with sustainable and/or fair trade products. CBI Tips for Finding Buyers may help you in your search.

What competition do I face on the European teff market?

General information on competition in the European market for grains and pulses is provided in the [CBI Competition](#) page on the [CBI Market Intelligence Platform](#). This platform also includes [Tips for doing business with European buyers](#). The present section provides further information about competition in the European market for teff.

Market entry – what are the opportunities and barriers?

Teff is a relatively new product in Europe. The number of importers of teff is still relatively small compared with those for other special or niche grains. This means that there is still an unexplored potential for teff. However, as with any gluten-free or health ingredient, buyers' requirements will be stringent.

European buyers are very aware of the potential risks of purchasing teff from developing countries. They will get samples analysed in the laboratory to ensure they are receiving the right quality. Laboratory tests in an EU country can differ considerably from those performed in the country of origin in terms of parameters tested and residue levels that are considered to be permissible.

Tips:

- Look for potential buyers at major trade events, such as [SIAL](#), [Anuga](#) and [Biofach](#). This is also a good way of checking out the European competition.
- Make sure your product is absolutely clean. Ask your buyer to have a sample tested in a laboratory in his own country to verify this.
- Prove yourself to be a reliable supplier in order to establish a long-term trade relation. Efficient communication and meeting agreements are essential to build trust.

Product competition – what are substitute products?

Teff is an alternative cereal grain for bakery and breakfast products. It is often sold as wholegrain flour or processed into puffed grains or flakes for breakfast cereals or porridge.

As a gluten-free grain type, teff can be replaced by other gluten-free grains and seeds, such as quinoa, amaranth, cañihua, millet, buckwheat, sorghum or oats (though oats are often contaminated by wheat gluten). Just like quinoa, teff has the advantage of being a traditional grain with a very specific origin, which can be beneficial in its branding or marketing.

Tips:

- Make sure you can guarantee a minimum availability and be honest about your capacities as a supplier, especially when targeting the food industry or when working with relatively new products.
- If you wish to supply the gluten-free market, you must take care to keep your teff seeds completely separate from gluten-containing grains post-harvest and during processing.

Company competition – who are my rivals?**And how much power do I have as a supplier when negotiating with buyers?**

Ethiopia produces such large volumes of teff that it has great potential as a global competitor. However, the fact that teff is a traditional staple for millions of smallholders in Ethiopia means that traceability, logistics and compliance with EU requirements will not be easy. Other countries starting to cultivate teff, such as South Africa, the USA and European countries such as Spain, are also emerging as new competitors.

Teff is mostly sold by specialised shops, but large retailers or supermarkets are also starting to carry it on their shelves (or in a special gluten-free department if they have one). The very strong buying power of European supermarket chains increases the pressure on suppliers to offer competitive and stable prices, reliable sourcing and strict compliance with retail standards.

Tip:

- Evaluate the possibility of integrating your supply chain with that of a strong partner in the EU in order to supply the major retail channels or large food processors. Make sure your company is ready for such commitment.

What do the trade channels and market segments of interest for teff in Europe look like?

General information on trade channels and market segments for grains and pulses in the European market is described in the [CBI Trade Channels and Market Segments](#) page on the [CBI Market Intelligence Platform](#). Much of this general information also applies to teff.

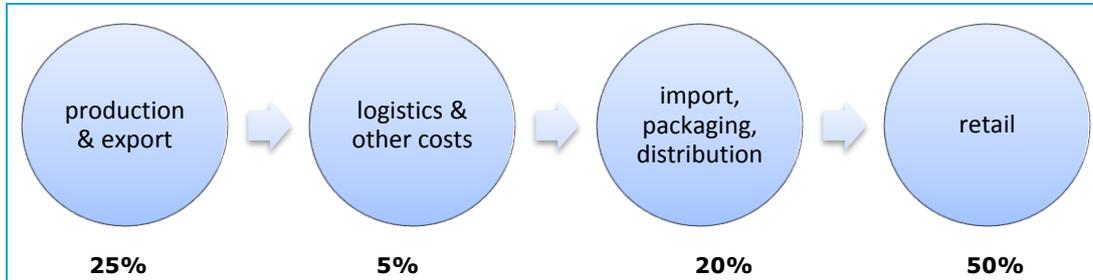
Trade channels for teff are pioneers in the healthy and gluten-free segments

Teff is a fairly new product in Europe, managed by pioneering importers and traders. As with other specialty grains, such as quinoa and amaranth, the trade channels can reach maturity relatively quickly. "Health" and "gluten-free" are the dominant success factors for teff.

The process industry (for example, for puffing, milling and production of flakes) and use as an ingredient are important for the development of teff. Most of these applications can be found in the health food segment. The traditional bakery sector will be relevant too, as long as prices remain affordable.

What are the end market prices for teff?

Figure 8: Breakdown of the consumer price for teff (indicative)



Consumer prices for teff grains and flour range from 8 to 18 euros per kg, depending on the country, brand and package size. The fact that this is still a new niche product keeps prices relatively high.

Tip:

- You can find information about consumer prices in online shops or the websites of supermarket chains, such as [Tesco](#), [Albert Heijn](#) or [Carrefour](#).

Useful Sources

Specific information about Teff

[The Whole Grains Council](#) (Teff) - A non-profit consumer advocacy group working to increase consumption of whole grains for better health.

Trade organisations

[Coceral](#) - European association of dealers in cereals, rice, feedstuffs, oilseeds, olive oil, oils and fats and agricultural supplies.

[Health Grain Forum](#) - An association set up to promote research and information on the production and consumption of healthy cereal foods.

Databases

[European Grain](#) - Platform linking grain buyers and sellers.

[Organic-Bio](#) - Database listing buyers and suppliers of organic food ingredients and products.

[Europages](#) - European business database.

[Kompass](#) - International business database.

Trade fairs

[Eventseye](#) - Worldwide database of trade fairs and expositions.

[SIAL](#) - Trade fair for food products.

[Anuga](#) - Trade fair for food products.

[Biofach](#) - Trade fair for organic food products.

[Certified Food](#) - Trade fair for certified raw materials and semi-finished products.

News sites

[Organic & Wellness News](#) - Website with news about organic and sustainable trade.

[Food Navigator](#) - Website with news about trends in the food industry.

[Food Manufacture](#) - Online news service about food and beverage trends in Europe.

Export requirements

[ITC Standards Map](#) - Overview of various standards and certification schemes.

[EU Export Help](#) - Information about export to Europe.

Statistics

[Market Access Database](#) - European trade statistics.

[ITC Trademap](#) - Global trade statistics.

[FAOSTAT](#) - Production data from the UN Food and Agriculture Organization



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December 2015