



Global Fonio Market

Market size, segmentation, competitive landscape and outlook

2021-2031

Moving forward, together



Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

ANDREY SHEVCHENKO, Managing Partner

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Indicator	Value
Market size (2025)	USD 1.2 bn
Forecast (2031)	USD 2.1 bn
CAGR (2021-2031)	8.9%
Study period	2021-2031
Largest region	Africa · 88.4%
Fastest-growing region	North America · 13.8%
Market concentration	Low
Licence	Individual / Company

The global fonio market reached USD XXX billion in 2025 and is forecast to attain USD XXX billion by 2031, advancing at an XX% CAGR. West African household consumption remains the market’s volume anchor, while industrial ingredients, premium packaged foods and brewing applications generate the strongest incremental value. Africa accounted for XX% of 2025 revenue, supported by Guinea’s position as the world’s dominant producer. North America is the fastest-growing regional market as fonio moves from specialty retail into food manufacturing, foodservice and branded beverages.

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Executive summary

The global fonio market reached USD XXX billion in 2025 and is forecast to attain USD XXX billion by 2031, advancing at an XX% CAGR. West African household consumption remains the market’s volume anchor, while industrial ingredients, premium packaged foods and brewing applications generate the strongest incremental value. Africa accounted for XX% of 2025 revenue, supported by Guinea’s position as the world’s dominant producer. North America is the fastest-growing regional market as fonio moves from specialty retail into food manufacturing, foodservice and branded beverages.

Indicator	Value
Market size 2025	XXX
Forecast 2031	XXX
CAGR	XXX
Largest region	XXX
Fastest region	XXX

Key findings

- The global fonio market generated USD XXX billion in 2025 and will reach USD XXX billion by 2031.
- Global fonio production totaled XXX tonnes in 2023, according to FAOSTAT country data.
- Guinea produced XXX tonnes in 2023, representing XX% of global output and confirming its central role in supply formation.
- Nigeria and Mali produced XXX tonnes and XXX tonnes respectively in 2023, making them the second- and third-largest producing countries.
- Cleaned whole grain represented XX% of 2025 market value, while flakes, crisps and extruded formats recorded the fastest product-form CAGR at XX%.
- Household staple consumption contributed XX% of 2025 value, but brewing and beverage applications are expanding at an XX% CAGR.
- Africa accounted for XX% of market revenue in 2025; North America is forecast to grow fastest at XX% annually through 2031.
- Terra Ingredients’ Guinea programme produced nearly XXX tonnes across XXX hectares in 2025, with participating farmers achieving average yields of approximately one tonne per hectare.

Market size and forecast

Market value by year, USD bn

Indicator	2026	2027	2028	2029	2030	2031	CAGR
Market value, USD bn	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Market volume	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Production	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Imports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Exports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Apparent consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Year-over-year value change

Indicator	2027	2028	2029	2030	2031	CAGR
Market value	X%	X%	X%	X%	X%	X%
Production	X%	X%	X%	X%	X%	X%
Imports	X%	X%	X%	X%	X%	X%
Exports	X%	X%	X%	X%	X%	X%

Source: XXX

Global Fonio Market Trends and Growth Drivers

Fonio is moving through two distinct commercial systems. West Africa supplies a large staple market shaped by harvest conditions, household purchasing power and traditional distribution, while export markets treat fonio as a premium, gluten-free and climate-resilient ingredient. The interaction between these systems determines farm-gate prices, processor utilisation and the availability of export-grade lots.

Processing is the decisive value-creation stage. Effective threshing, decortication, cleaning, precooking and milling raise recovery rates and convert a labour-intensive grain into a dependable industrial input. Recent capacity programmes show that farmers can respond to organised demand; the commercial priority is now matching production and processing throughput with repeat contracts.

Demand creation is broadening beyond natural-food retail. Snack manufacturers, cereal developers, foodservice operators and brewers are testing fonio's functional and marketing potential. Scale will depend on whether these trials become permanent product platforms supported by competitive landed costs and consistent technical specifications.

Growth drivers

Climate-resilient grain procurement

Food manufacturers are diversifying grain portfolios toward crops that tolerate short rainy seasons and require limited purchased inputs. Fonio's Sahelian production profile gives procurement teams a credible route to combine supply resilience, biodiversity and smallholder-impact objectives.

Gluten-free portfolio expansion

Fonio provides manufacturers with a naturally gluten-free grain suitable for flour blends, cereals, snacks and prepared meals. Its mild flavour and rapid preparation improve its fit with mainstream formulations compared with more strongly flavoured specialty grains.

Mechanised processing capacity

Automated threshing, decortication, cleaning and precooking reduce impurities, labour requirements and batch variability. Higher-throughput facilities in Senegal and expanding cooperative programmes in Guinea are converting fragmented farm supply into repeatable commercial ingredients.

African cuisine premiumisation

Retailers, chefs and food brands are giving West African ingredients greater shelf and menu visibility. Fonio benefits from a differentiated cultural narrative while retaining the versatility required for grain bowls, pilafs, breakfast dishes and side dishes.

Brewing innovation

Commercial beer launches have demonstrated that fonio can function as a distinctive brewing grain and brand platform. Brewery trials broaden industrial demand, attract consumers outside natural-food channels

and create higher-value offtake for consistent ingredient grades.

Impact-linked supply-chain finance

Development finance, buyer commitments and impact capital are supporting aggregation, equipment and processing assets across West Africa. These investments reduce the working-capital gap between harvest purchases and export sales while strengthening traceability.

Restraints

Fragmented farm aggregation

Fonio is sourced from geographically dispersed smallholders with uneven access to threshing, storage and quality-control infrastructure. Aggregators must manage moisture, impurities and variety consistency across many small lots, raising procurement and verification costs.

Processing and freight economics

The grain's small kernel increases the technical demands of decortication and cleaning, while landlocked production zones add inland transport costs. Export-market margins narrow quickly when utilisation at processing plants is low or shipment volumes remain subscale.

Low category awareness

Outside West Africa, many consumers and product developers remain unfamiliar with fonio's preparation, taste and formulation behaviour. Brands must therefore invest in education, sampling and recipe communication before repeat purchasing reaches mainstream levels.

Staple and ancient-grain substitution

Rice, millet and sorghum retain price and distribution advantages in African markets, while quinoa and established gluten-free grains command stronger awareness internationally. Fonio must deliver either competitive convenience or a defensible premium to gain shelf space.

Fonio Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Climate-resilient grain procurement	XXX	XXX	XXX
Gluten-free portfolio expansion	XXX	XXX	XXX
Mechanised processing capacity	XXX	XXX	XXX
African cuisine premiumisation	XXX	XXX	XXX
Brewing innovation	XXX	XXX	XXX
Impact-linked supply-chain finance	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Fragmented farm aggregation	XXX	XXX	XXX
Processing and freight economics	XXX	XXX	XXX
Low category awareness	XXX	XXX	XXX
Staple and ancient-grain substitution	XXX	XXX	XXX

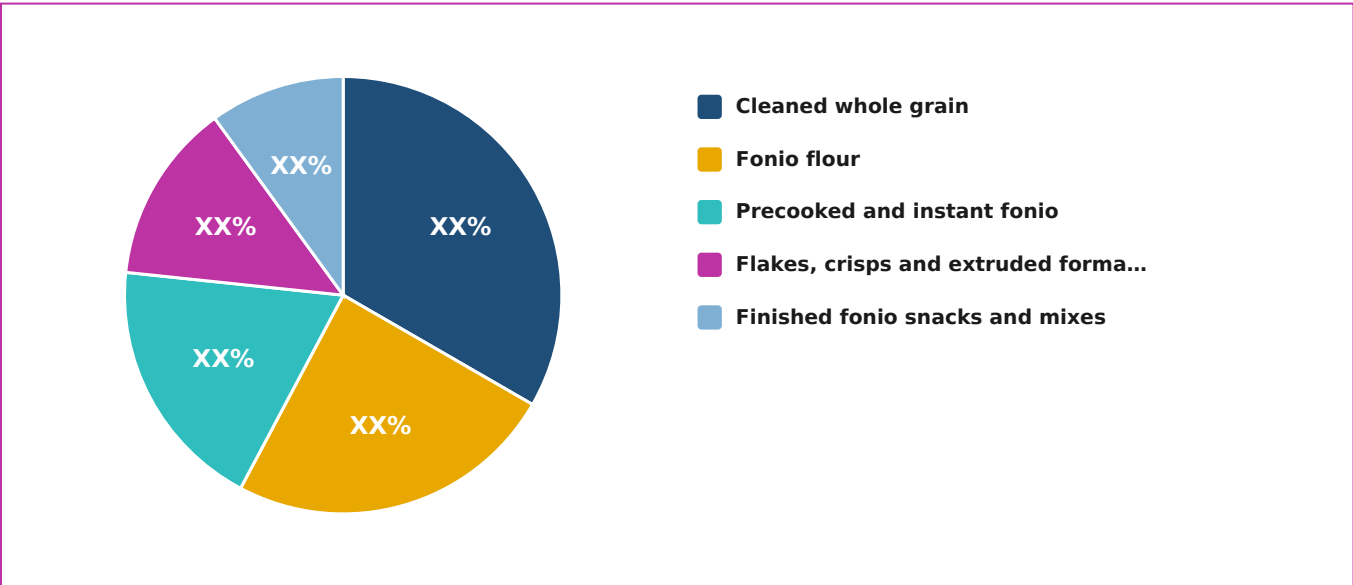
Source: XXX

Fonio Market Segmentation by Product, Application and Channel

By Product Form

Whole grain dominates because household and foodservice preparation remains the core use across West Africa. Flour and precooked formats gain share as brands reduce preparation complexity and manufacturers seek repeatable specifications. Flakes, crisps and extruded inclusions post the fastest growth through snack, cereal, bar and confectionery applications.

Value share by product Form, 2025



Source: XXX

Value by product Form, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Cleaned whole grain	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Fonio flour	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Precooked and instant fonio	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Flakes, crisps and extruded formats	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Finished fonio snacks and mixes	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

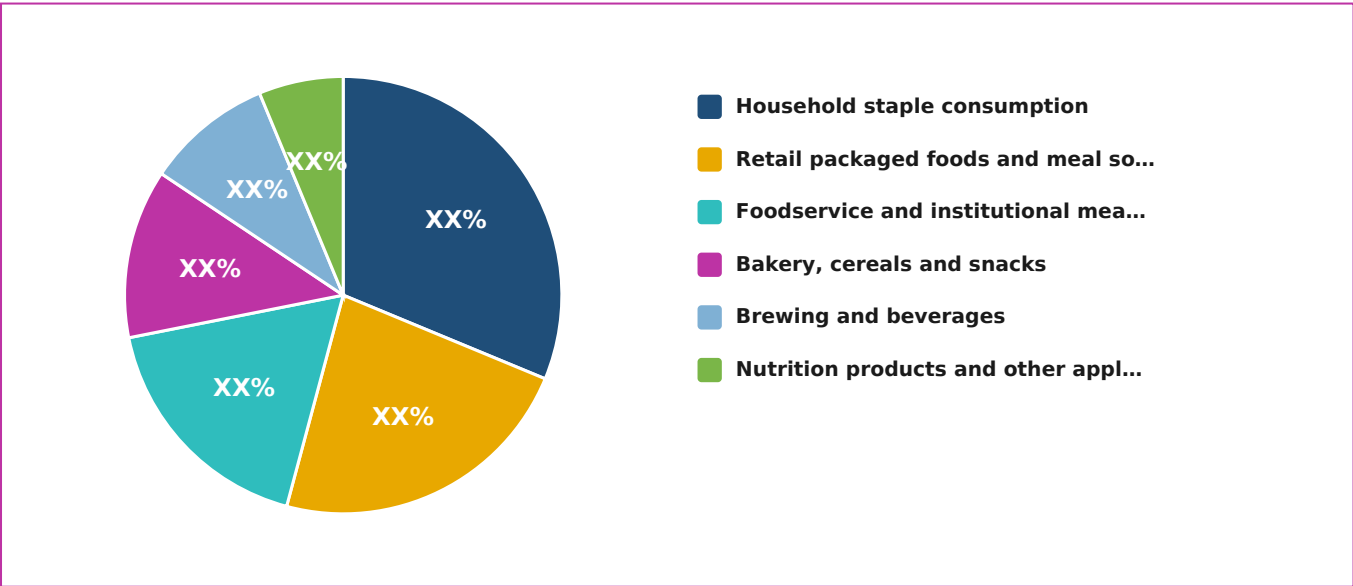
Source: XXX

By Application

Household meals remain the demand foundation because fonio is embedded in established culinary and ceremonial uses across producing countries. Packaged foods and foodservice gain from urbanisation and

convenience, while bakery and snack manufacturers use flour and inclusions to differentiate gluten-free products. Brewing grows fastest from a small base as commercial launches validate flavour, fermentation and brand-story potential.

Value share by application, 2025



Source: XXX

Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Household staple consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Retail packaged foods and meal solutions	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Foodservice and institutional meals	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Bakery, cereals and snacks	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Brewing and beverages	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Nutrition products and other applications	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Sales Channel

Open markets, independent shops and informal wholesalers remain essential to African household distribution. Modern retail and e-commerce capture higher unit values through branded, cleaned and convenience-oriented packs. Direct industrial sales grow quickly as processors build recurring relationships with food manufacturers and breweries.

Value by sales Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Traditional retail and open markets	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Modern grocery and specialty retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Foodservice distributors	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Direct industrial and ingredient sales	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
E-commerce and direct-to-consumer	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Certification

Conventional supply dominates because the market is centred on local and regional consumption where formal certification adds limited value. Certified organic fonio commands stronger premiums in European and North American natural-food channels. Growth depends on documented chain of custody, segregated processing and certification costs being supported by dependable buyer commitments.

Value by certification, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Conventional	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Certified organic	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

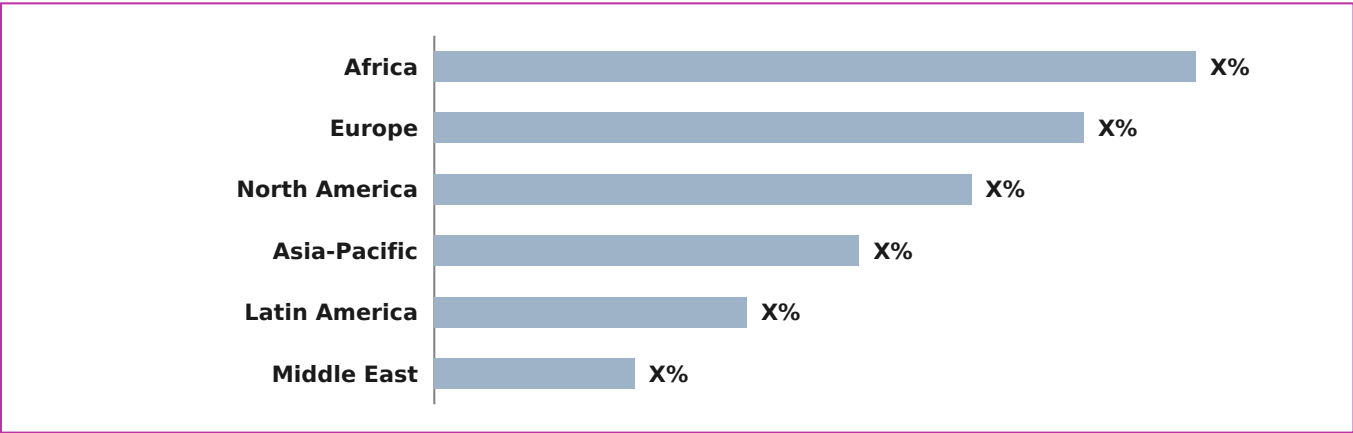
Fonio Market Regional Analysis and Country Outlook

Africa remains the centre of fonio production and consumption, accounting for XX% of global market value in 2025. Guinea anchors the supply base, while Nigeria and Mali provide the next-largest production pools. Senegal has assumed an outsized processing and export role through Dakar-based infrastructure, branded products and access to maritime logistics, while Burkina Faso, Côte d'Ivoire, Niger and Togo support regional diversification.

North America is forecast to grow at XX% annually through 2031. The United States leads regional demand through specialty grocery, e-commerce, foodservice, ingredient trials and brewing innovation led by businesses such as Yolélé, Terra Ingredients and Brooklyn Brewery. Canada remains smaller but benefits from established natural-food channels and companies such as Farafena.

Europe combines a XX% CAGR with a clearer regulatory route following the authorisation of decorticated *Digitaria exilis* grains under Commission Implementing Regulation (EU) 2018/2016. France, the United Kingdom, Germany and the Netherlands form the principal demand cluster, supported by African diaspora retail, organic distribution and specialty importers. Asia-Pacific, Latin America and the Middle East remain emerging markets where premium retail and chef-led adoption precede industrial-scale demand.

Growth rate by region, 2025-2031



Source: XXX

Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Latin America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Market value by leading country, USD bn

Country	2025	2031	Share 2025	CAGR
United States	XXX	XXX	XXX	XXX
Germany	XXX	XXX	XXX	XXX
United Kingdom	XXX	XXX	XXX	XXX
Belgium	XXX	XXX	XXX	XXX
Netherlands	XXX	XXX	XXX	XXX
Japan	XXX	XXX	XXX	XXX
China	XXX	XXX	XXX	XXX
Mexico	XXX	XXX	XXX	XXX

Source: XXX

Fonio Market Competitive Landscape and Company Share

The global fonio market has low concentration because most volume passes through smallholder production, village processors, open markets and regional traders. The export-ready segment is more concentrated: Yolélé Ingredients, Terra Ingredients and Compagnie Africaine Agroalimentaire possess differentiated sourcing, processing or commercialisation capabilities, while Farafena, Aduna, Obà Food and specialist European importers compete through branded propositions and certification.

Competitive advantage is shifting from basic grain access toward control of decortication quality, impurity specifications, precooking, flour functionality and traceable aggregation. Companies able to supply bulk grain, flour, crisps and application support from the same platform are positioned to win multinational food and beverage accounts. Farmer price mechanisms and reliable purchase commitments are also becoming strategic assets as supply programmes scale.

Partnerships are shaping market development more strongly than conventional consolidation. Ingredient suppliers collaborate with farmer organisations, development-finance providers, distributors and consumer brands, while breweries use limited releases to test formulation and consumer response. Capacity additions in Senegal and Guinea are increasing potential supply, making demand creation and plant utilisation the next competitive battleground.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Yolélé Foods	XXX	XXX	XXX	XXX
Yolélé Ingredients	XXX	XXX	XXX	XXX
Terra Ingredients	XXX	XXX	XXX	XXX
Compagnie Africaine Agroalimentaire	XXX	XXX	XXX	XXX
Farafena	XXX	XXX	XXX	XXX
Aduna	XXX	XXX	XXX	XXX
Obà Food	XXX	XXX	XXX	XXX
Symfonio	XXX	XXX	XXX	XXX
Gebana	XXX	XXX	XXX	XXX
Juka's Organic Co.	XXX	XXX	XXX	XXX

Source: XXX

Global Fonio Market Forecast and Commercial Opportunities

The market will advance from USD XXX billion in 2025 to USD XXX billion in 2031. Growth will be led by a combination of rising West African urban consumption, greater conversion of informal volumes into packaged channels, and faster adoption of fonio flour, precooked grain, extruded inclusions and brewing inputs in export markets.

The central forecast assumes continued investment in industrial cleaning and decortication, broader retail availability and disciplined production growth aligned with contracted demand. A stronger-upside pathway emerges if multinational manufacturers convert trials into recurring procurement programmes; slower processing utilisation and weak consumer education would keep export growth closer to specialty-channel levels.

Winning suppliers will sell specification, reliability and application performance rather than grain provenance alone. Traceable farmer networks, certified food-safety systems, competitive landed cost and format innovation will determine who captures the premium between farm-gate grain and finished foods.

Opportunities

- Contracted industrial ingredient supply for global food manufacturers
- Fonio-based beer, malt alternatives and fermented beverages
- Certified organic and fully traceable export programmes
- Instant cereals, bakery blends, snacks and extruded inclusions
- Private-label fonio for mainstream European and North American retailers
- Regional processing hubs serving intra-African urban markets

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