



[Exporting quinoa to Europe](#)

In Europe, quinoa has been developed by the organic sector and grown significantly since 2012. It caught the attention of many food specialists and its popularity is a direct result of increasing consumer awareness of healthier diets. The first signs of a stabilising growth came in 2017. The novelty of the quinoa trade is now over, but it has left a permanent mark on the habits of European consumers. Future opportunities in Europe will be driven by product development and the increasing use of quinoa as an ingredient. You can find further opportunities in a geographic expansion from the early adopters in Western Europe to the eastern European countries.

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1 . Product description

Quinoa (*Chenopodium quinoa*) is an ancient grain crop that was originally domesticated 3,000 to 4,000 years ago in the Andean region of Bolivia and Peru. The crop is part of the *Amaranthaceae* family, and is not a true grass but rather a pseudocereal. Quinoa is mainly used for its edible seed, which is gluten-free, high in protein and a good source of fibre. Quinoa seeds have a bitter saponin coating, which is usually removed from commercial quinoa intended for human consumption.

There are over 3,000 varieties of quinoa, many of which are still grown and several varieties are commercialised. These varieties have diverse nutritional properties, but so far the awareness in the market of these differences is limited. The key properties for trading purposes are:

- the colour (yellow-white, red or black)
- saponin level (sweet or bitter quinoa)
- growth climate (highland or lowland)

Most varieties are cultivated in the South-American highlands. A larger quinoa type grown on the

Bolivian *altiplano* or highlands is marketed as Royal Quinoa (*Quinoa Real*). Four different varieties are used to produce Royal Quinoa, which has obtained its own protected [designation of origin](#) (DO).

In the international [Harmonized Commodity Description and Coding System](#), quinoa is registered under a specific statistical number (see Table 1).

Table 1: Combined Nomenclature (CN) Code for quinoa

Statistical Number	Product
1008.50.00 (from 2012)	QUINOA "CHENOPODIUM QUINOA"

Source: Eurostat

2 . What are the main developments on the European market for quinoa?

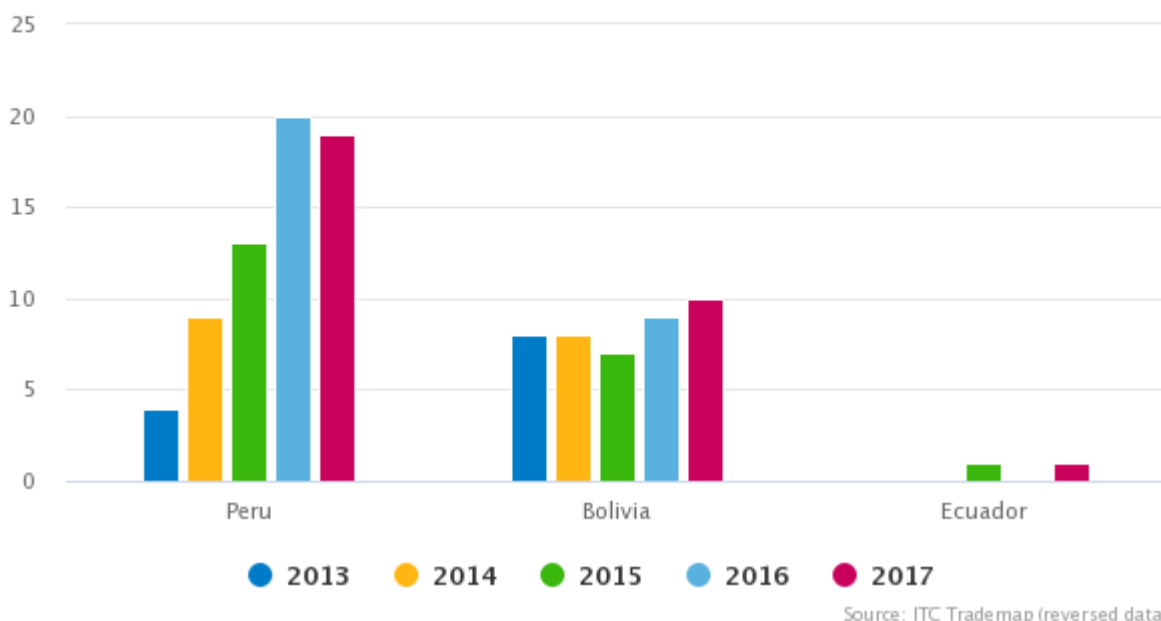
Peru dominates quinoa supply to Europe since 2014

About 97% of the quinoa imported into the European Union (EU) come from Peru and Bolivia. Peru has profited the most from the quinoa hype and has set up large scale quinoa production projects. Although Peru’s quinoa exports have declined slightly in 2017 due to climatic difficulties in the cultivation, they are still nearly double the Bolivian supply in volume.

Although Peru and Bolivia are still the world’s main suppliers, many other countries aspire to cultivate and export quinoa. Read more about quinoa becoming a worldwide crop below.

When exporting to Europe you have to take into account that the quinoa market has become much more competitive.

Figure 1: Quinoa supply to the European Union
in 1.000 tonnes



France is the largest importer of quinoa

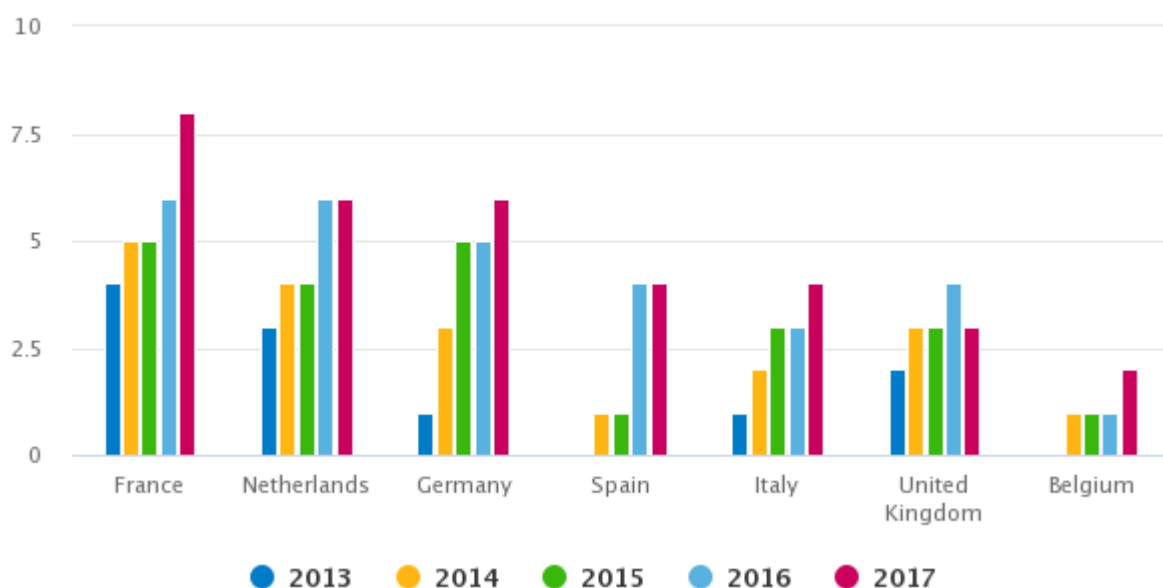
France has been a pioneering country for quinoa and still leads the import in Europe. Unlike other large importers, France still imports the majority of its quinoa from Bolivia, although Peru is

closing in. One of the first European countries to cultivate quinoa, France has now become the second biggest producer in Europe, after Spain.

Germany, Spain and Italy entered the quinoa market after France, but have closed the gap with their recent growth. Quinoa is also expanding to relatively new producing countries such as Poland, Bulgaria, Portugal and the Czech Republic. This provides new opportunities in a competitive market.

Figure 2: Main European importers of quinoa

in 1,000 tonnes



Source: ITC Trademap

Tip:

- Explore the large markets with growing imports, but keep an eye also on potential growth in new markets in Central and Eastern European countries, such as Poland, the Czech Republic and Bulgaria. Use our tips on [finding buyers in the European grains and pulses sector](#).

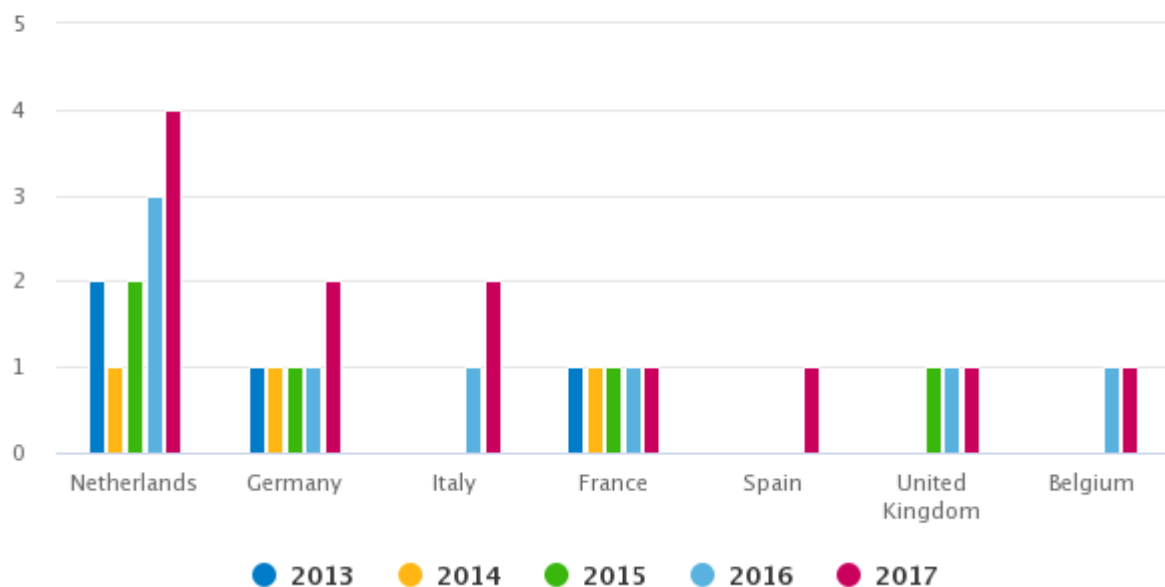
The Netherlands is the main trade hub for quinoa

The Netherlands, which has an important role in the European trade in general, is also the second most important point of entry for quinoa in Europe.

With a re-export volume of around 4,000 tonnes in 2017, the Netherlands is the main trade hub for quinoa. From the Netherlands, most of Europe can be reached. Germany, France, and recently Italy and Spain, also exported relatively large volumes of around 2,000 tonnes. For you as an exporter, these are the main countries for bulk supply, but be aware that part of the exports growth, such as in Spain, can be attributed to local development of quinoa cultivation.

Figure 3: Export of quinoa per European country

in 1.000 tonnes



Source: ITC Trademap

Tip:

- Focus on the Netherlands, Germany or France when looking for an international quinoa trader, and to supply larger volumes. These are countries with experienced quinoa importers and where strong relationships are important.

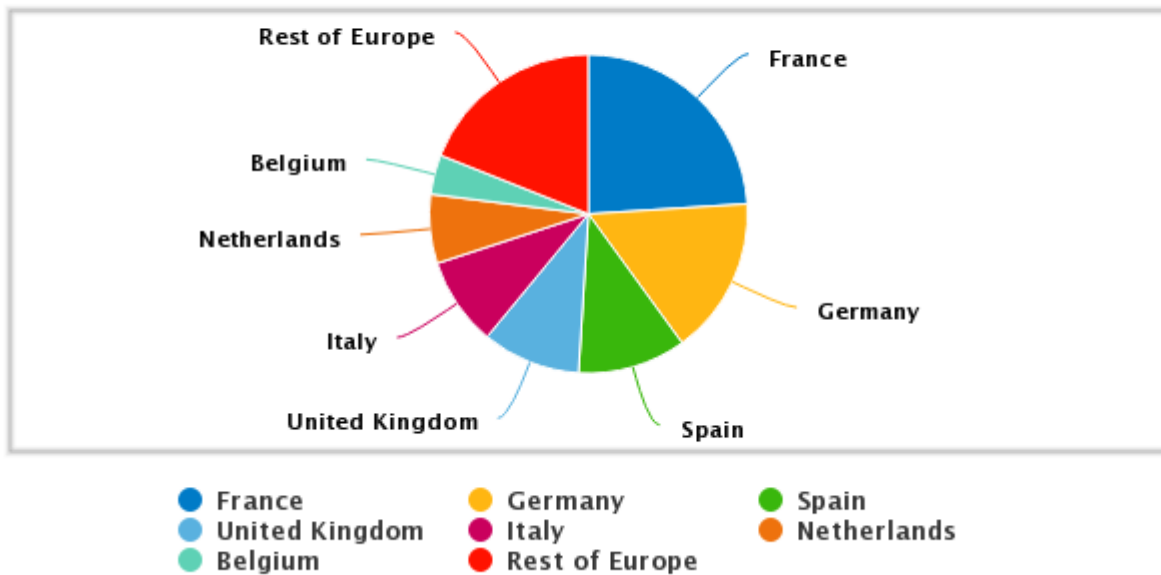
Consumption in Europe still rising

The total estimated consumption of quinoa in Europe in 2017 was almost 26,000 tonnes, after a year-on-year increase, excluding the European production. The main consumer markets for quinoa include France, Germany, Spain, the United Kingdom, Italy and the Netherlands. Each of the large consumer countries consumes or processes between 2,000 and 6,000 tonnes of quinoa per year.

In Central and Eastern European countries, such as Poland, the Czech Republic and Bulgaria, consumption is still very low but growing and expected to follow the same growth path in the future. Quinoa will continue to be incorporated in European diets. It is important you maintain a broad view on the market development throughout Europe.

Figure 4: Indicative European consumption of quinoa 2017

import minus export, excluding local production



Source: ICT Trademap and Market Access Database

Tip:

- Keep up to date on consumption trends and new products to identify new target groups. Follow news sources such as [Food Navigator](#) and find quinoa products of grocery shops, online retailers, and websites, such as [mySupermarket.co.uk](#), which compares British supermarkets.

Insecurity of future supply and prices

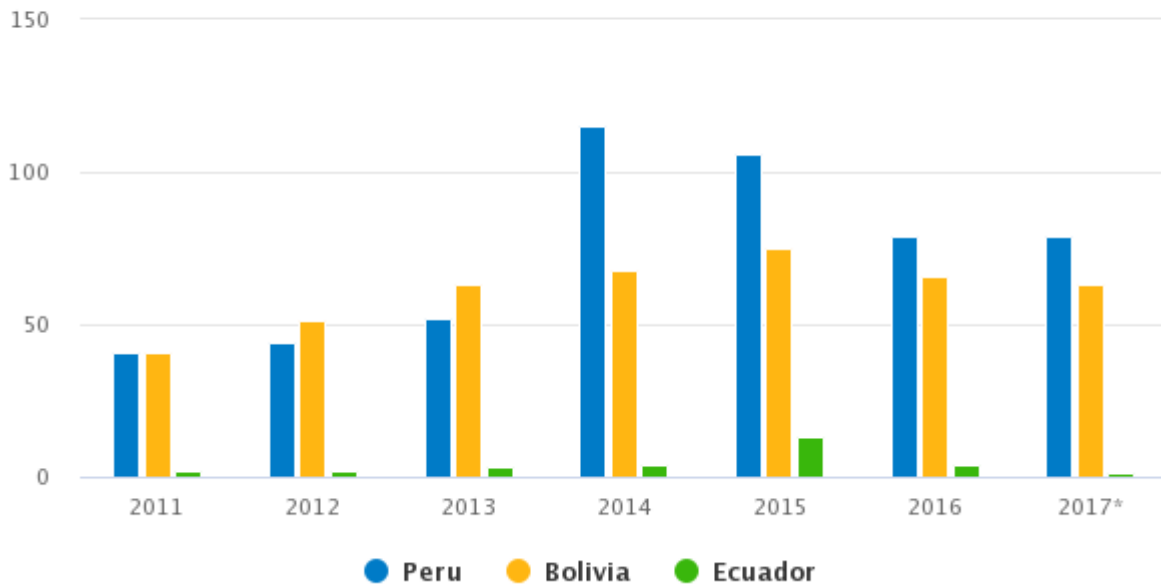
The production of quinoa in Peru and Bolivia has developed quickly to meet the international demand. Demand for quinoa is still increasing but the growth rate has slowed down. This means that production outgrew demand, resulting in a downward correction of the quinoa trade prices. These trade prices have stabilised at just over US\$ 2 per kg for conventional quinoa, which for many market players appears to be sustainable.

Production volumes have reduced in recent years, especially in Peru, due to unfavourable weather conditions, which has brought some relief on the price pressure. According to the analysis of a [Dutch trader](#) earlier in 2018, there may be a chance of prices going up a little for white quinoa.

When taking part in the international quinoa trade, you must maintain a long-term vision to stay in business.

Figure 5: Production of quinoa

in 1.000 tonnes



Source: FAOSTAT (until 2016), Minagri Peru and Centro Internacional de la Quinoa (2017)

* 2017: Peru Jan-Oct / Ecuador estimate

3 . Which trends offer opportunities in the European market for quinoa?

Quinoa as health food

A growing number of consumers in Europe are increasingly aware of the need for a healthy diet. Quinoa is an ideal example of the healthy 'superfoods' that has received much media attention in the past years. Much of the rise in imports of quinoa can be attributed to consumer perception of its healthy, nutritious properties.

The demand for healthier food will continue to grow. Quinoa is not the only upcoming healthy grain on the market, but it will still enjoy opportunities in specific niches such as the gluten-free market.

Tip:

- For more information on healthy grains, see similar product factsheets about other grains on the [CBI market intelligence platform](#).

Organic predominates

Increased attention to health and environmental and social responsibility is leading to rapid growth of the organic sector. The demand for quinoa in Europe has been entirely driven by the organic sector. As a result much of the quinoa on the market is organic. This trend has persisted even after large conventional retailers started to stock quinoa.

The current demand is still predominantly for organic quinoa, but as quinoa is becoming a more common product there is growth potential in the conventional market too.

Tip:

- For more information on which countries offer the best opportunities for organic products, check our study on the [trends on the European grains and pulses market](#).

Interest in new, authentic food

Many European consumers are prepared to try out 'new', authentic products. The story behind quinoa, depicting it as an ancient grain from the native Andean region, makes the product more interesting.

Bolivia differentiates its offer with the Royal Quinoa variety, emphasising its origin and superior quality. You can use the authenticity of the product in your promotion if you are a company from the Andean region, but do not expect it to be the most important commercial factor. Quinoa itself is already considered an ancient grain regardless of its true origin.

Tip:

- If possible, create a good story for your product, including information on such aspects as its origin, social impact and traditional cultivation.

Quinoa as an ingredient

The variety of food products available on the European market is growing rapidly. Quinoa is an interesting ingredient for new products in this expanding market. It is used in grain mixes, such as rice and quinoa or [quinoa and pulses](#), and in [salads](#), [pastas](#), ready-made meals and [soups](#), [bakery](#) products, [snacks](#) and [breakfast](#) cereals.

The future growth of quinoa in Europe depends partly on the continuing development of these new products. You can use this development to target different types of clients in food processing. Most of the European food brands present their new products on trade fairs, so that is a good place to see what's new.

Tips:

- Take the time to check out important food fairs, such as [SIAL](#), [Anuga](#) and [Biofach](#).
- Keep up to date on new food trends in Europe by visiting news websites, such as [Food Navigator](#), [Organic & Wellness News](#) and [Food Manufacture](#).

4 . What requirements should quinoa comply with to be allowed on the European market?

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

Food safety

To export quinoa to Europe you have to deal with a strict set of rules and obligations on food safety. The [General Food Law](#), which regulates food safety in the European Union, also applies to quinoa. As a supplier you must make sure that your quinoa exports are traceable and that safety systems such as Hazard Analysis Critical Control Points ([HACCP](#)) are in place. The [information sheet](#) of the international laboratory Eurofins provides a comprehensive overview of the product analyses for quinoa and other pseudo-cereals.

As food safety is a top priority in all European food sectors, expect most buyers to request extra guarantees from you in the form of certifications and compliance with food management systems, such as [GlobalG.A.P.](#) for the agricultural production and [ISO22000](#), [BRC](#) or [IFS](#) for the processing and handling of quinoa.

Tips:

- Use the [ITC Standards Map](#) or the [GFSI website](#) to learn about the different food safety management systems, hygiene standards and certification schemes. Having a HACCP-based system is a minimum requirement, but you must always check with your buyers to determine which certification scheme is most relevant for your target market.
- For the full requirements on food safety, read the study on [buyer requirements](#) for grains and pulses in Europe.
- Read about your [key obligations in Europe as a food and feed business operator](#).

Maximum Residue Limits

The Maximum Residue Limits (MRLs) for pesticides that might be used on quinoa can be found in the [EU Pesticide Database](#). Use of “quinoa” or “Buckwheat and other pseudo cereals” 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](#).

Be aware that the MRL requirements for organic quinoa – and for quinoa used in baby food – are much more stringent.

Tips:

- Read the [European Union Factsheet on contaminants](#) and the [European Union Factsheet on new rules on pesticide residues in food](#).
- Take extra precaution with organically produced quinoa. Avoid the use of any chemical pesticide and cross-contamination.
- Find out about the general export requirements for quinoa by consulting the [EU Trade Helpdesk](#): fill in the product code for quinoa (10085000), the country of origin and the destination of the quinoa to find the information required.

5 . Which additional requirements do buyers often have?

Organic certification

Most quinoa marketed in Europe has an organic label. Organic is no longer a niche market for

quinoa, but a common requirement on the part of many buyers.

Organic certification is often demanded for food products associated with health benefits. The European market for quinoa has been entirely developed by organic trading companies. You need to use organic production methods as laid down in [EU legislation](#) in order to market organic quinoa in the EU.

Tips:

- Read about the organic farming principles on the [IFOAM Organics International website](#).
- Find importers that specialise in organic products in the [International directory of organic food wholesale & supply companies](#). You can also visit special trade fairs for organic products, such as [Biofach](#) in Germany.
- Read about organic certification in the study on [buyer requirements for grains and pulses in Europe](#).

Social compliance and sustainability

European buyers are paying increasing attention to their corporate responsibilities concerning the social and environmental impact of their business. As an exporter you are part of the supply chain and share this responsibility.

A popular “superfood” from developing countries typically attracts a great deal of attention. Its commercialisation may lay it open to extremes of both hype and savage criticism. The quinoa trade, particularly in Bolivia, has been the subject of much publicity concerning its alleged role in soil depletion and food security. Such media debate (whether or not it is justified) will increase the importance of transparent compliance with social and environmental requirements.

Tips:

- Check your company’s current performance and implement the [amfori BSCI code of conduct](#). You can also find many practical tools in the [amfori BSCI resources](#).
- Read about the different social programmes and initiatives in the study on [buyer requirements for grains and pulses in Europe](#).

Quality requirements

If you are planning to export quinoa to Europe, you will have to meet the right quality standards.

The [Codex Alimentarius Commission](#) (CAC) has approved to establish a work group involving Bolivia and the USA that proposed an international standard for quinoa. The European Commission has proposed a draft standard for quinoa, which is currently under revision. The [latest update](#) dates from April 2018. As long as this standard has not been implemented, you can best follow the required specifications of your buyer.

European buyers will expect the following quality standards for quinoa:

- Whole quinoa grains, not genetically modified
- Colour: white / yellowish white (or red, black, depending on variety)

- Moisture level max 14%
- Purity level 99.7–99.9%
- Size: 1.5–2 mm (depending on use)
- Free from any foreign materials
- Quality in accordance with EU regulation on contaminants, maximum residue limits (MRLs) and microbiological properties
- Optional standards: organic, gluten free, kosher

The post-harvest treatment of quinoa normally includes cleaning (centrifuging), washing (removing saponin coating), drying, ventilation, de-stoning, removing impurities, size grading, colour sorting and packing.

New buyers will often require samples, which should be representative of the delivered product.

Labelling requirements

If you want to export to Europe, you must label your product. These labels must comply with European regulation.

You can read more about [food labelling on the EU Trade Helpdesk](#). For information about consumers labels see [European Union Regulation 1169/2011](#). For consumer products you are also obliged to provide the nutritional information.

The following items should be on the label of pre-packed quinoa:

- 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).

You should use English on you labels, 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 requirements

Quinoa is usually shipped in 25 kg polypropylene or paper bags, or sometimes in large 1,000 kg bags. The buyer may or may not require bags to be placed on pallets. Different buyers have different preferences.

Other packaging and shipping requirements:

- If you want to use other forms of packaging, you should take [EU legislation for food contact materials](#) into account.
- Quinoa should be dry, cool and well-ventilated during storage, loading and shipment. Bags are often stacked up to the roof to make full use of available container space. In this case, containers should be thoroughly cleaned beforehand. Stacking bags on pallets may be a safer option. The cargo must also be protected from moisture, pests and cross-contamination (especially with organic produce).

6 . What are the requirements for niche markets?

Fair trade and environmental certification

Fair trade and sustainable certification are additional requirements that can help your product stand out from the mass of competitors and attract consumers who are more aware of these issues. Several European brands of quinoa carry a fair trade label. This is a clear sign of social compliance, and increases consumer confidence. However, to be fully fair trade certified is a benefit, but not required by most buyers.

Tips:

- Find a specialised European buyer who is familiar with sustainable and/or fair trade products. The membership lists of fair trade associations may help you find the trading partner you are looking for.
- Read about fair trade and environmental certification in the study on [buyer requirements for grains and pulses in Europe](#).

7 . What competition do you face on the European quinoa market?

Quinoa is becoming a worldwide crop

Although it does not yet show up in FAOSTAT data, the cultivation of quinoa is no longer unique to the Andean region, as new varieties and production methods are being tested worldwide. Production initiatives can be found on all continents and substantial production is recorded in the USA, Australia, France and Spain. For India, China and Ethiopia emerging initiatives have been recorded. New producing countries will at least partly produce for their own internal demand.

Quinoa in marginal areas:

The [International Center for Biosaline Agriculture](#) (ICBA) published a paper in 2016 proving that quinoa can be very productive in marginal areas where irrigation is lacking and salinity levels are high. This creates opportunities for quinoa production in the Middle East and North Africa. One of the current projects is about [scaling up the quinoa value chain to improve food and nutritional security in poor rural communities of Morocco](#).

Quinoa production in Europe:

Researchers in the Netherlands have developed a [quinoa variety](#) fit for lowland production. Cultivation initiatives have started in [France](#), the [Netherlands](#), the [United Kingdom](#), [Germany](#), [Italy](#), [Spain](#), Denmark and Belgium.

Europe counts with an estimated production of several thousand tonnes, with France and Spain being possibly the leading producers. It will be hard for Europe to compete with the volumes and production costs of South America, but a local quinoa supply is considered to be more sustainable and therefore should be taken into account as a competing crop.

Scientific research:

Research institutes in the US (Washington State University) and in Denmark (University of Copenhagen) have also developed varieties adapted to temperate climates. The King Abdullah University of Science and Technology (KAUST) in Saudi Arabia has successfully mapped [the genetic structure of quinoa](#), which allows genetic modification and future crop productivity.

Tip:

- Carefully consider which quinoa varieties are legally available and suitable for the growing conditions in your country. Look into new varieties of quinoa and compare your quinoa seeds with those cultivated in other parts of the world.

Repositioning of traditional suppliers

The enormous increase in production is a result of many new farmers capitalising on the popularity of the quinoa grain. Large farms achieve much higher yields and up to two harvests per year in the lowlands of Peru nowadays, [outcompeting](#) small, traditional farmers in the highlands of Peru and Bolivia.

To deal with these developments, traditional farmers have sought solutions in repositioning their product with the support of trade promotion organisations. In Bolivia, they have succeeded in protecting the origin of a specific variety, Quinoa Real, obtaining a protected [designation of origin](#), recognised by the [Andean Community](#). In Puno, Peru, there have been efforts to promote quinoa as a true Andean crop supported by a collective brand named [AYNOK'A](#), which refers to a traditional form of collective land management.

According to industry sources, price and quality are dominant over the appreciation of different varieties and origins, so being competitive in efficiency and supply remains most important. In the highland region, if you are not part of a collective initiative, you can also try to excel in organic production as this is much harder to achieve in the coastal areas.

Tip:

- Emphasise efficiency in production and maintain high-quality standards at all times. Alternatively, work towards differentiation of your product, or participate in collective initiatives to position your product or region.

Buyers seek the best suppliers

The number of EU buyers of quinoa has increased over the past few years. However, the number of potential suppliers has also risen sharply. As a result, finding a regular buyer or winning a supply contract will take you significantly more effort than it used to. Quality and food safety are important issues to differentiate your company from other suppliers.

European buyers are very aware of the potential quality risks when purchasing quinoa. They will ask for samples and will get these analysed in laboratories to ensure they receive the right quality.

As a supplier you have to know the quality of your product. However, the quality test in your home country is not necessarily conclusive for your European buyer. The tests done in laboratories in a European country may differ considerably from tests by laboratories in your country, for example in terms of parameters tested and the residue levels that are considered permissible.

Entry to the European market for non-organic quinoa will be easier in terms of residue levels, but much more challenging in finding buyers, as a large part of the quinoa market is still organic.

Tips:

- Make sure your product is absolutely clean and, if samples are sent, make sure the sample is representative and corresponds to the shipment you have planned.
- 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.
- See our [tips for doing business with European buyers](#) of grains and pulses.

What are substitute products?

Quinoa is a specialty product that is an ideal alternative to common grains, such as rice or wheat, and a high-value ingredient in grain mixes or processed food.

In the bakery sector quinoa has to compete with lower-priced ancient grains, such as spelt, barley and millet. It has achieved a stronger position with the more exclusive consumers. However, it often has to compete with other high-value or gluten-free grains, such as amaranth and teff.

Product development is important for the future growth of quinoa. For quinoa to maintain a leading position in the market for special and ancient grains, a consistent quality and supply is a must.

Tip:

- 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.

Who are your competitors?

The quinoa trade has entered a mature phase, in which European buyers, overwhelmed by the number of suppliers, have started to adopt a much more cautious purchasing policy.

The supply situation for quinoa can vary on an annual basis, but as long as the supply is adequate and sufficient, new quinoa suppliers will find it hard to compete with established exporters. On the other hand, buyers may be more responsive to price competition. You must be competitive on price just as much as on other specifications.

Competition is still concentrated in Peru and Bolivia. Nevertheless, all the new initiatives aimed at cultivating quinoa in different parts of the world make it likely that the competition will diversify in the long term.

Tip:

- Check the information of sector organisations and stakeholders in large producing countries for forecasts, and use this information to determine your supply strategy. Example sources include quinua.pe and [Minagri](#) in Peru, the [Centro Internacional de la Quinoa](#) and the Bolivian Institute for foreign trade ([IBCE](#)) in Bolivia.

How much power do you have as a supplier when negotiating with buyers?

Quinoa was initially introduced to the European market via nature shops and organic food stores. Nowadays, large conventional supermarkets also carry organic quinoa as a regular item on their shelves.

The buying power of European supermarket chains is very large. This makes it even more important for you as a supplier to offer stable prices, reliable sourcing and strict compliance with retail standards.

Tips:

- Improve your competitive position. Convince your buyer that you are a valuable trading partner, for example by gaining additional certification, introducing basic processing of your product, or combining it with complementary products, such as amaranth or other special grains.
- Evaluate the possibility of integrating your supply chain with that of a strong partner in Europe to reach the major retail channels or big food processors. Make sure your company is ready for such commitment.
- If you manage your own agricultural production, use this as a unique selling point (USP) when dealing with importers. Importers prefer to negotiate directly with producing partners, thus minimising the number of intermediaries they have to deal with.

8 . Through what channels can you get quinoa onto the European market?

Quinoa was developed in the organic market segment, such as nature shops and organic food stores. It was also picked up quickly by online health shops. Although the market is still predominantly organic, supermarkets have now taken over a large share of the commercialisation of quinoa.

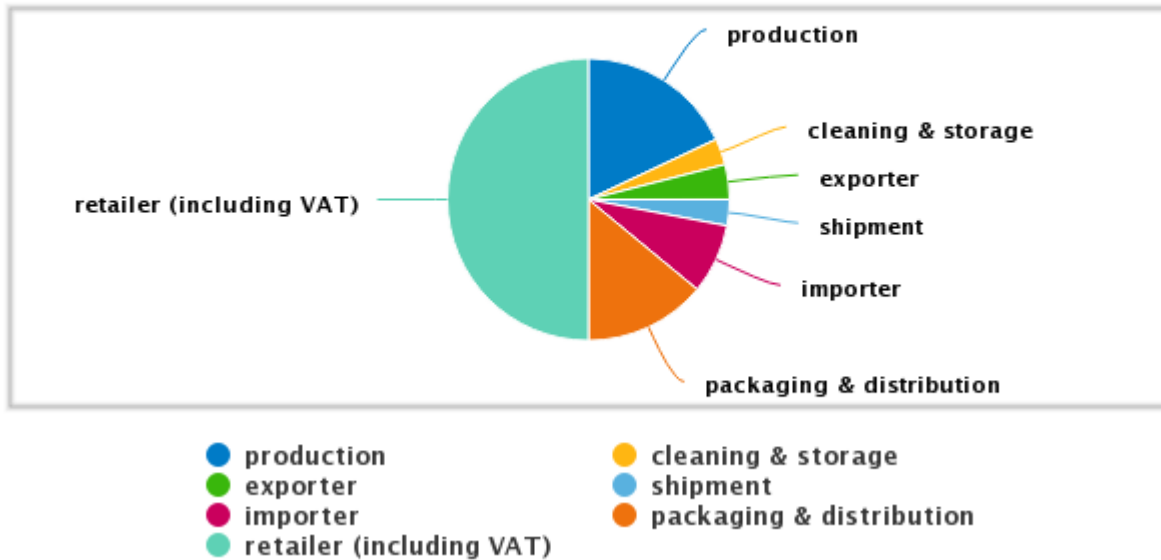
In the main import countries, the quinoa trade has been consolidated to a number of strong importers; often companies that are experienced in organic grains, seeds and sometimes nuts and dried fruit. Besides the established importers, food processors and brands that process or pack larger quantities of quinoa have also started to source quinoa directly from origin. The development of new products containing quinoa will also open up new market segments. Other companies that may arise in the quinoa trade will likely be from countries where quinoa is still a growing novelty product.

Tips:

- Look for potential buyers at major trade events, such as [SIAL](#), [Anuga](#) and [Biofach](#) for organic products. This is also a good way of checking the different market channels for quinoa in Europe.
- See the research on [trade channels and market segments](#) for grains and pulses. This provides you with general and more detailed information.

9 . What are the end-market prices for quinoa?

Figure 6: Breakdown of the consumer price for quinoa (indicative)



Source:

Consumer prices for organic quinoa are generally between € 7.50-11 per kg, depending on the brand and package size. Retail prices of non-organic quinoa are nowadays close to the price of organic, but conventional quinoa is still less demanded.

Consumer prices for red and black quinoa are usually a bit higher, partly because these are considered to be specialties. There may be less pressure on the margins thanks to their smaller market sizes, but they are still influenced by production volumes.

Retail prices cannot fluctuate in the same way, since trade prices and price adjustments will be slower. This means that margins at the very end of the value chain actually increased while trade prices were dropping.

You have to realise that retail prices are not in any way linked to trade prices.

Tip:

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

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