



[Exporting quinoa to Europe](#)

The European market for quinoa seeds has grown rapidly in recent years. The European Union (EU) imported more than four times as much quinoa in 2016 than in 2012. In Europe, quinoa has been developed mainly by the organic sector. It has caught the attention of many food specialists and its popularity is a direct result of increasing consumer awareness of healthier diets. The novelty of the quinoa trade is over, but it has left a permanent mark on the grain consumption pattern. Future opportunities in Europe will be driven by product development and the increasing use of quinoa as an ingredient. A geographic expansion from the early adopters in western Europe to the eastern European countries is also taking place.

Contents of this page

1. [Product description](#)
2. [What are the main developments on the European market for quinoa?](#)
3. [Which requirements should quinoa comply with to be allowed on the European market?](#)
4. [Which additional requirements do buyers often have?](#)
5. [What are the requirement for niche markets?](#)
6. [What competition do you face on the European quinoa market?](#)
7. [What are substitute products?](#)
8. [Who are your competitors?](#)
9. [How much power do you have as a supplier when negotiating with buyers?](#)
10. [Through which channels can you get quinoa on the European market?](#)
11. [What are the end-market prices for quinoa?](#)

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 good as a source of fibre. The 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 of which are commercialised. These varieties have diverse nutritional properties, but the awareness on the market of these differences has so far been limited. The key properties for trading purposes are:

- 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.

In the international [Harmonised 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"
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)

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

Peru has dominated quinoa supply to Europe since 2014

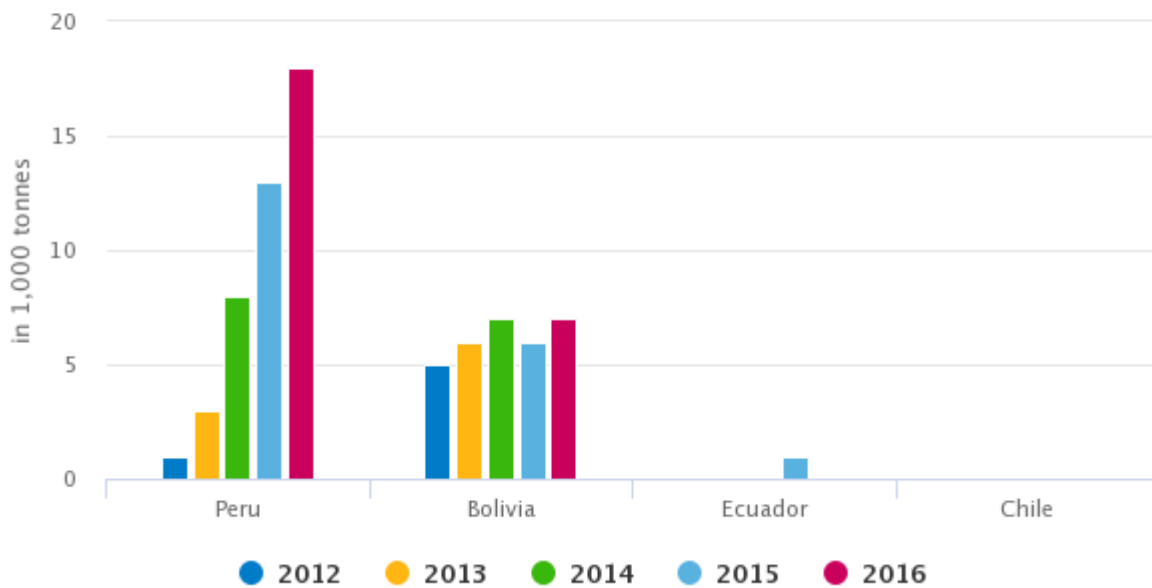
About 97% of the nearly 26,000 tonnes imported to the European Union (EU) in 2016 came from Peru and Bolivia. Although Peru and Bolivia are still the main global suppliers, many other countries now aspire to cultivate and export quinoa (read about quinoa becoming a worldwide crop below).

Bolivia used to be the main exporter of quinoa to Europe until the year 2013. It has, however, become less competitive compared to Peru.

The growth that was anticipated after the [International Year of Quinoa](#) in 2013 has proven to be most beneficial for Peru. In 2016, Peru exported more than two and a half times the volume of Bolivia. 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 2012–2016

in 1,000 tonnes



Source: Market Access Database (Comext)

France is the largest importer of quinoa

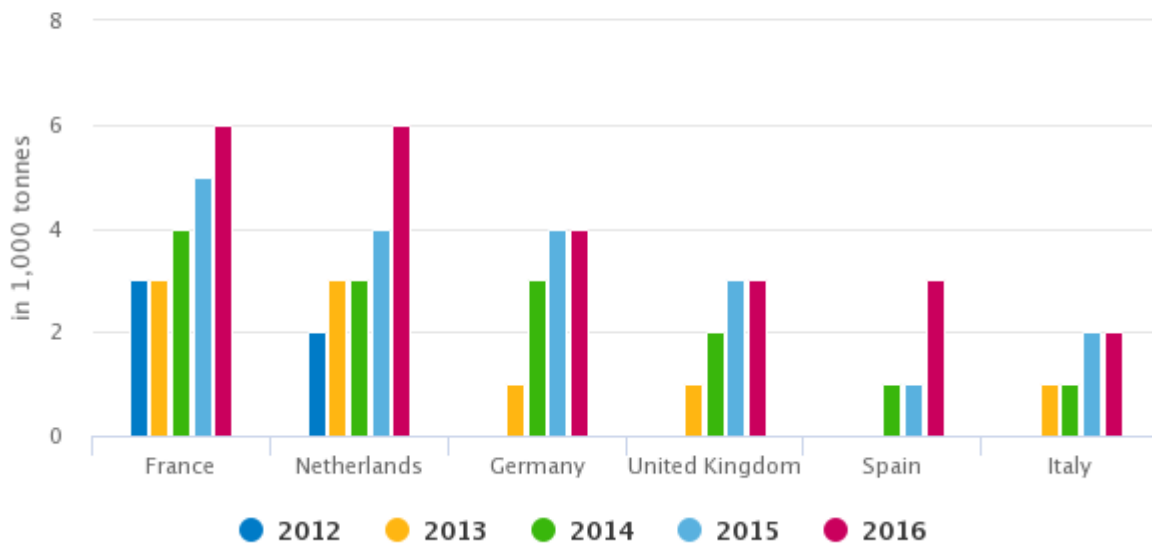
France has been a pioneering country for quinoa and still leads the import in Europe. Unlike other large importers, France still imports the majority of its quinoa from Bolivia, although Peru is closing the gap. France was also one of the first European countries where quinoa was produced and is now one of the largest producers in Europe (together with Spain).

The Netherlands is the second most important place of entry for quinoa in Europe and has an important role in the European trade (see the section below).

The European market is expected to expand further to eastern Europe, where quinoa is still relatively unknown. This provides new opportunities on a competitive market.

Figure 2: European import of quinoa from non-EU countries 2012–2016

in 1,000 tonnes



Source: Market Access Database

Tips:

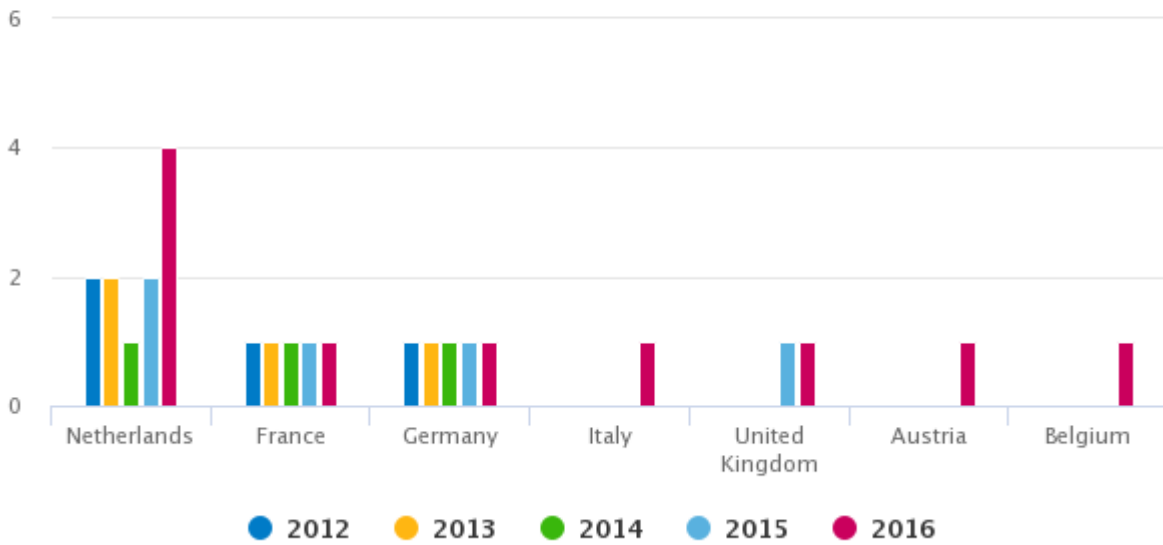
- Explore growing import markets such as Italy, Spain and Germany. Also keep an eye on potential growth in new markets in Central and Eastern European countries such as Poland, the Baltic States and the Czech Republic.
- Invest in building strong client relations. It is crucial to have loyal customers on a buyer's market.

The Netherlands is the main trade hub for quinoa

With an export volume (re-exports) of around 3,500 tonnes in 2016, the Netherlands is the main trade hub for quinoa. From the Netherlands, most of Europe can be reached. Germany and France also exported between 1,300 and 1,500 tonnes. For you as an exporter, these are the main countries for bulk supply, but you can also find more and more opportunities for direct export in other countries. The main destinations for quinoa traded within Europe are France, Italy, the United Kingdom and Belgium.

Figure 3: Export of quinoa per European country 2012–2016

in 1,000 tonnes



Source: ITC Trademap

Tip:

- Focus on Germany, the Netherlands or France when looking for an international quinoa trader. Be aware of the growing opportunities for supplying to other European countries directly; for example, to Italy, Austria or Belgium.

Insecurity of future supply and prices

The production of quinoa in Peru and Bolivia has developed quickly to meet the international demand. However, they nowadays produce much more than they can export, so large volumes have to be absorbed on their national market. This development has led to the downward correction of the quinoa trade prices, stabilising at a level of US\$ 2 per kg for conventional quinoa, which for many market players appears sustainable.

The 2016/2017 crop yield in Bolivia is expected to be much lower as a consequence of prolonged drought in the sowing season (between September and November). Part of the Peruvian crop has been affected by heavy rains in March. How much this situation will influence current production remains hard to predict, since quinoa is a very resilient crop. The 2017 harvest started in April.

The supply side seems to react very strongly to price signals, which may once again lead to rapid changes in the available supply. Ironically, most market players would benefit from a stable price development, but none of them are able to bring it about. You must maintain a long-term vision to stay in business.



Peru for volume, Bolivia for specialities

Peru has managed to upscale its production of quinoa and achieves higher yields than producers in Bolivia, with [peaks of 1.2 tonnes per hectare in the highlands and up to 6 tonnes in lowland areas](#) where two harvests are often possible with irrigation.

However, a higher yield does not necessarily mean lower production costs, since the land in the Bolivian highlands is owned collectively and does not constitute a cost factor (is unpaid), for example. The production in the lowlands, by contrast, requires extensive and expensive pesticide use.

A large part of the Bolivian production is realised in the area around the Uyuni salt flats. These have an extreme climate due to the altitude, characterised especially by night frosts. In these southern highlands, there is no alternative for quinoa, since quinoa is the only crop that can be cultivated.

This is in stark contrast with the situation in the northern *altiplano* in Bolivia and in Peru, where there are many alternative crops, and even more so in the coastal planes. Farmers will decide on the continuation of quinoa production in view of the existing alternatives.

In Bolivia, the production is more traditional. The yields are much lower than in Peru, but a large percentage is produced organically and the Bolivian highlands produce excellent quinoa varieties such as the larger Royal Quinoa (*Quinoa Real*). The Bolivian Royal Quinoa has obtained a protected [designation of origin](#), recognised by the [Andean Community](#).

According to industry sources, price and quality are dominant over the appreciation of different varieties. As a result, being competitive in terms of efficiency and supply remains the most important aspect.

Tips:

- Emphasise efficiency in production, but maintain high quality standards at all times.
- Alternatively, work towards differentiation of your product.

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, with substantial production being 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 production can be very successful 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.

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 [UK](#), [Germany](#), [Italy](#), Spain,

Denmark and Belgium.

Approximately 2,000 tonnes of quinoa were produced in Europe in 2015, with France as the leading producer. It will take time before the quinoa production in Europe can compete with the volumes and pricing of South American quinoa producers. However, this is a scenario that you have to take into account as a foreign supplier.

Scientific research

Research institutes in the US (Washington State University) and 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.

Consumption in Europe is still rising

The total estimated consumption of quinoa in Europe in 2016 was around 25,000 tonnes, following a year-on-year increase and excluding the European production. The main consumer markets for quinoa include France, Germany, the United Kingdom, Italy and the Netherlands. Each of the large consumer countries consume between 2,500 and 5,000 tonnes.

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



Tip:

- Keep up to date with consumption trends and new products in order to identify new target groups. Grocery shops, online retailers and websites such as MySupermarket.co.uk, which compares British supermarkets, can be useful sources of information.

Quinoa as a 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 received much media attention in the past years. Much of the rise in the 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 trends in the sector, read the study of [Trends on the European grains and pulses market](#).

Organic dominates

An increased attention to both 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 have 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 as well.

Tip:

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

Interest in new, authentic food

Many European consumers are prepared to try out “new” 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 on this expanding market. It is used in grain mixes such as rice and quinoa or quinoa and pulses, as well as in salads, pastas, ready-made meals, 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 those are a good place to see what is new.

Tips:

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

Hype or new staple food?

There has been much speculation about the future role of quinoa in Europe. Our study of [scenarios for the future of the Andean quinoa sector](#) gives an overview of this discussion.

Current insights indicate that it is unlikely for quinoa ever to become a staple food in Europe and replace commodities such as rice. On the other hand, the popularity of quinoa can no longer be regarded as a hype; it has proven its worth both as an ingredient and as an alternative grain.

3 . Which requirements should quinoa comply with to be allowed on the European market?

Which 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 the Hazard Analysis Critical Control Points ([HACCP](#)) are in place. In 2016, traces of ochratoxin were found in quinoa from Ecuador, which threatens to pose a problem to the trade from this country.

Tips:

- For the full requirements on food safety, read the study of [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](#). Using “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 [Export Helpdesk](#); fill in the product code for quinoa (10085000), the country of origin and the destination of the quinoa to find the required information.

4 . 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 organic farming and European guidelines in this field on the [European Union website for organic farming](#).
- Find importers that specialise in organic products via 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 of [Buyer requirements for grains and pulses in Europe](#).

Food safety certification

As food safety is a top priority in all European food sectors, you can expect most buyers to request extra guarantees from you in the form of certification.

For quinoa, you need to comply with recognised food management systems, both in production and processing (cleaning and packing).

Tips:

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

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 new, 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 (see the relevant [scenarios for quinoa](#)).

Tips:

- Check your company’s current performance; for example, by performing a self-assessment. Details of how to do so may be found on the [BSCI website](#).
- Implement corporate social responsibility (CSR) in your company culture, and share your environmental and social policies with your buyers. Download the [GSCP Reference Tools](#) for more detailed information.
- Read about the different social programmes and initiatives in the study of [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 the establishment of a working group,

involving Bolivia and the USA, which has since proposed an international standard for quinoa. The European Commission has recently published its [comments](#) on the [proposed draft standard for quinoa](#) in the FAO Circular Letter 2017 (CL 2017/01-CPL). As long as this standard has not been implemented, you would do best to follow the required specifications of your buyer.

European buyers will expect the following quality standards for quinoa:

- whole quinoa grains, not genetically modified;
- white/yellowish-white colour (or red, black, depending on variety);
- moisture level max. 14%;
- purity level 99.7-99.9%;
- 1.5-2 mm in size (depending on use);
- free of any foreign materials;
- quality in accordance with EU regulation on contaminants, maximum residue limits (MRLs) and microbiological properties;
- optional standards such as organic, gluten-free or 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 Export Helpdesk](#). For information about consumers labels, see [European Union Regulation 1169/2011](#). For consumer products, you are also obliged to provide 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 the 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 used on the 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 the [EU legislation on 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 in order to make full use of the 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).

5 . What are the requirement for niche markets?

Fair Trade, sustainable and environmental certification

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

Tips:

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

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

What are the opportunities and barriers?

The number of EU buyers of quinoa has increased in recent 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 previously. 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 analyse these in laboratories to ensure that 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 considered permissible.

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

Tips:

- Make sure that your product is absolutely clean and, if samples are sent, make sure that the sample is representative of and corresponds to the shipment which you have planned.
- Prove yourself to be a reliable supplier in order to establish a long-term trade relation. Ensuring efficient communication and meeting agreements are essential to build trust.
- See our [Tips for doing business with European buyers](#) of grains and pulses.

7 . What are substitute products?

Quinoa is a speciality product that is an ideal alternative to common grains such as rice or wheat, as well as 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 in the more exclusive consumer product sector. 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 on the market for special and ancient grains, a consistent quality and supply is a must.

Tip:

- Make sure that you can guarantee a minimum availability and be honest about your capacities as a supplier, especially when targeting the food industry or working with relatively new products.

8 . Who are your competitors?

The quinoa trade has entered a mature phase. The massive increase in production volume has caused supply to surpass demand and turned the suppliers' market into a buyers' market in 2014/2015.

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, new arrivals will find it hard to compete with established exporters. Conversely, 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 (see above).

Tip:

- Check the information of sector organisations in large producing countries such as quinoa.pe in Peru or the Bolivian Institute for foreign trade (IBCE) in Bolivia for forecasts, and use this to determine your supply strategy.

9 . 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 obtaining additional certification, introducing basic processing of your product or combining it with complementary products such as amaranth or cañihua.
- Evaluate the possibility of integrating your supply chain with that of a strong partner in Europe to reach the major retail channels or large food processors. Make sure that your company is ready for such a 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 with which they have to deal.

10 . Through which channels can you get quinoa on 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 trade in quinoa.

Of the many companies that entered the quinoa trade in the past, only the most firmly established importers are expected to survive. Although the trade in quinoa can be expected to consolidate in the near future, the development of new products containing quinoa will open up new market segments.

Tips:

- Look for potential buyers at major trade fairs such as [SIAL](#), [Anuga](#) and [Biofach](#) (for organic products). This is also a good way of checking out the European competition.
- See the study of [Trade channels and market segments](#) for grains and pulses. This provides you with general and more detailed information.

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



Generally, consumer prices for organic quinoa are between € 10 and € 13 per kg, depending on the brand and package size. The market for non-organic quinoa is growing, but prices may be as much as 20% lower.

Consumer prices for red and black quinoa are usually a bit higher, partly because these are considered to be specialities.

The trade prices for quinoa have been much more volatile than the consumer prices. Quinoa reached its top price of almost € 5,000 per tonne FOB in early 2014 and dropped about 50% in the subsequent year. Retail prices cannot fluctuate in the same way. 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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