



Global Quinoa Seeds 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 1.1 bn
Forecast (2031)	USD 1.6 bn
CAGR (2021-2031)	6%
Study period	2021-2031
Largest region	North America · 34.8%
Fastest-growing region	Asia-Pacific · 8.1%
Market concentration	Low
Licence	Individual / Company

The global quinoa seeds market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Demand is moving beyond whole-grain retail into clean-label snacks, breakfast products, gluten-free bakery, ready meals and functional ingredients. North America remains the largest consuming region, while Asia-Pacific delivers the strongest growth as domestic cultivation, modern retail and premium nutrition categories scale. Peru and Bolivia continue to anchor global supply, complemented by expanding production systems in Canada, the United States, Europe and India.

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Executive summary

The global quinoa seeds market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Demand is moving beyond whole-grain retail into clean-label snacks, breakfast products, gluten-free bakery, ready meals and functional ingredients. North America remains the largest consuming region, while Asia-Pacific delivers the strongest growth as domestic cultivation, modern retail and premium nutrition categories scale. Peru and Bolivia continue to anchor global supply, complemented by expanding production systems in Canada, the United States, Europe and India.

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

Key findings

- The market generated USD XXX billion in 2025 and will reach USD XXX billion by 2031.
- Global quinoa production totaled XXX tonnes in 2023; Peru supplied XX% and Bolivia XX%, according to FAOSTAT.
- Peru exported XXX tonnes of quinoa worth USD XXX million in 2024, with export volume rising XX%, according to MIDAGRI.
- Bolivia exported XXX tonnes worth USD XXX million in 2024, an increase of XX% in volume and XX% in value, according to Bolivia's INE and IBCE.
- White quinoa represented XX% of market value in 2025 because it offers the mildest flavour, broadest availability and strongest processing compatibility.
- Organic quinoa accounted for XX% of 2025 revenue and commands its strongest penetration in North America and Western Europe.
- North America held XX% of global market value in 2025, supported by established natural-food distribution and mainstream supermarket availability.
- Asia-Pacific will grow at an XX% CAGR through 2031 as India, China, Japan and Australia broaden quinoa use in premium packaged foods.

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 Quinoa Seeds Market Trends and Growth Drivers

Quinoa has completed its first transition from Andean staple to globally recognized premium grain; the next phase is industrial normalization. Buyers increasingly specify colour, seed size, saponin level, hydration performance, microbiological status and allergen controls, turning post-harvest capability into a source of margin and customer retention.

Supply economics remain shaped by the interaction between concentrated Andean production and dispersed global demand. Peru provides scale and a large domestic market, Bolivia retains differentiation in Royal Quinoa and organic supply, and emerging origins offer diversification rather than near-term displacement of the Andes.

Demand growth is broadening from natural-food consumers to mainstream households and formulated foods. The category's competitive task is to preserve a credible nutrition and provenance premium while closing the convenience and price gap with rice, oats, pulses and other ancient grains.

Growth drivers

Gluten-free grains enter the mainstream

Quinoa combines natural gluten-free positioning with familiar grain-style preparation, allowing retailers to merchandise it across health, rice, organic and meal-solution aisles. Wider supermarket distribution is converting quinoa from a specialist product into a repeat-purchase pantry staple, particularly in the United States, Canada, the United Kingdom, Germany and Australia.

Food manufacturers broaden quinoa applications

Snack, cereal, bakery, prepared-meal and nutrition-bar manufacturers are using quinoa to add protein, texture and premium label appeal. This broadens demand beyond household cooking and favours suppliers able to deliver uniform seed size, controlled moisture, validated gluten-free handling and dependable contract volumes.

Complete plant-protein positioning

Quinoa's amino-acid profile supports its role in plant-forward diets without requiring the product to imitate meat. Demand is strongest where consumers seek minimally processed protein sources and recognizable ingredients, creating growth in grain bowls, salads, breakfast products and premium convenience foods.

Organic and traceable supply premiums

Organic quinoa maintains a material value premium because the certification aligns with the purchasing criteria of natural-food retailers and premium brands. Stronger enforcement of transaction certificates and importer accountability rewards processors with documented chain of custody, residue programmes and direct grower relationships.

Cultivation expands beyond the Andes

Canadian, US, European and Indian production programmes shorten selected supply chains and reduce dependence on a single harvest corridor. Locally adapted genetics also open applications requiring lower saponin, consistent colour or domestic-origin claims, expanding category access even as Peru and Bolivia retain leadership.

Public investment strengthens Andean value chains

Programmes such as Peru's ProQuinoa are funding producer organization, post-harvest equipment, certification and commercial access. These measures improve exportable recovery rates and allow smallholder groups to meet buyer specifications for cleanliness, traceability, organic status and food-safety systems.

Restraints

Andean harvest and logistics volatility

Peru and Bolivia account for nearly all recorded global production, concentrating exposure to drought, frost, transport disruption and regional price swings. Buyers respond through larger inventories and dual-origin contracts, but these measures raise working-capital and qualification costs.

Substitution by lower-cost grains

Rice, oats, couscous, lentils and regional millet varieties compete for the same meal occasions at lower price points. Quinoa therefore depends on nutrition, provenance and convenience differentiation, particularly when household budgets weaken or retailers rationalize premium ranges.

Quality-control burden

Export quinoa requires effective saponin removal, foreign-material control, moisture management and compliance with pesticide and microbiological limits. Inconsistent post-harvest practices can lower usable yield or trigger rejected lots, favouring scaled processors over informal aggregators.

Smallholder certification economics

Organic audits, internal control systems, segregation and documentation impose recurring costs across fragmented producer networks. When the organic premium narrows, growers may return acreage to conventional production or alternative crops, limiting certified supply responsiveness.

Quinoa Seeds Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Gluten-free grains enter the mainstream	XXX	XXX	XXX
Food manufacturers broaden quinoa applications	XXX	XXX	XXX
Complete plant-protein positioning	XXX	XXX	XXX
Organic and traceable supply premiums	XXX	XXX	XXX
Cultivation expands beyond the Andes	XXX	XXX	XXX
Public investment strengthens Andean value chains	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Andean harvest and logistics volatility	XXX	XXX	XXX
Substitution by lower-cost grains	XXX	XXX	XXX
Quality-control burden	XXX	XXX	XXX
Smallholder certification economics	XXX	XXX	XXX

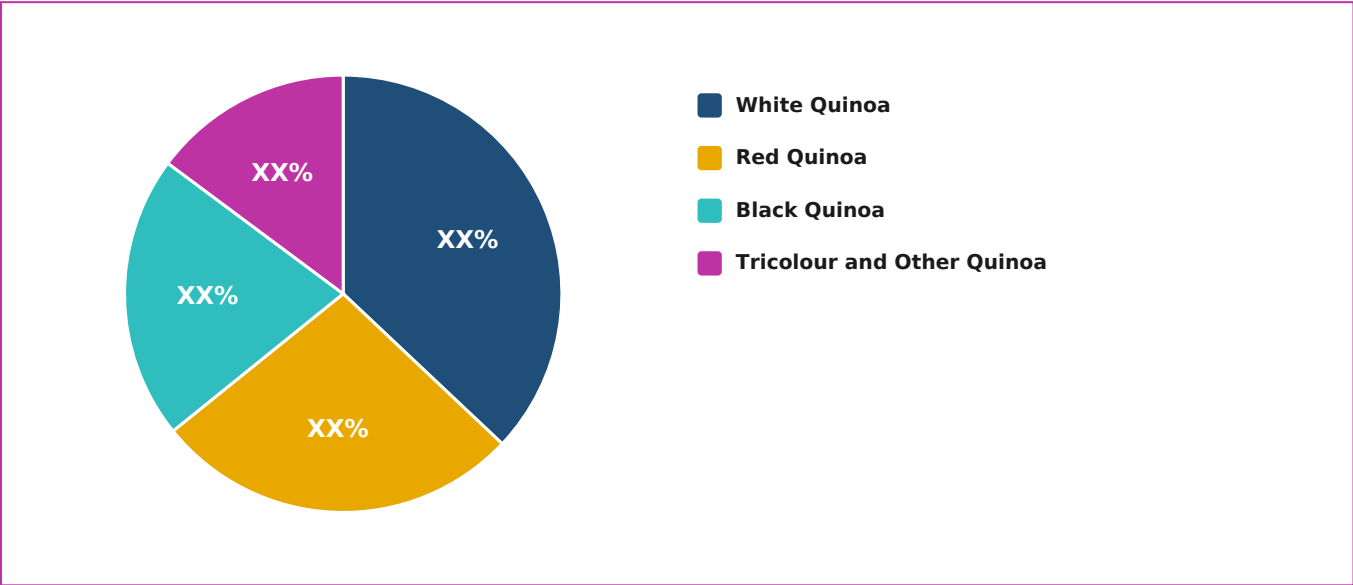
Source: XXX

Quinoa Seeds Market Segmentation Analysis

By Seed Colour

White quinoa dominates because it has a mild flavour, soft cooked texture, high agronomic availability and broad compatibility with retail and industrial recipes. Red and black varieties command premiums in salads, grain blends and visually differentiated prepared foods. Multicolour packs expand fastest in specialty retail, although their requirement for controlled colour ratios limits bulk-scale procurement.

Value share by seed Colour, 2025



Source: XXX

Value by seed Colour, USD bn

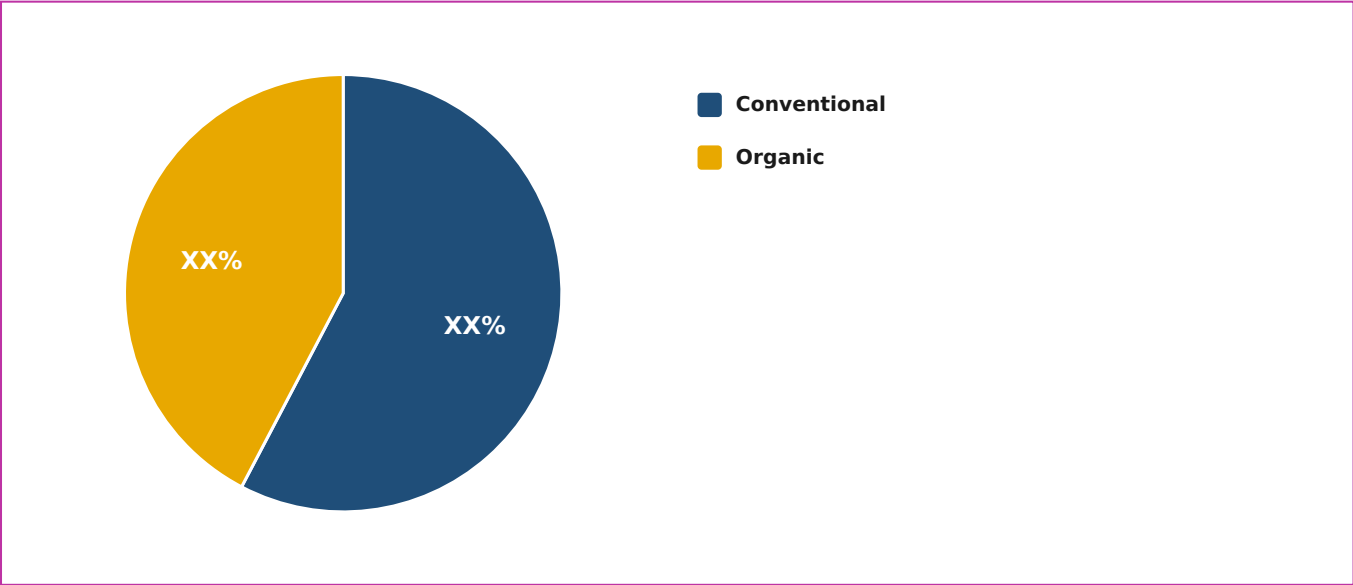
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
White Quinoa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Red Quinoa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Black Quinoa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Tricolour and Other Quinoa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Cultivation Method

Conventional production leads through its price advantage, flexible aggregation and strong role in domestic Andean consumption and mainstream private label. Organic quinoa is more deeply penetrated in North America and Western Europe, where certification, residue assurance and sustainability claims support higher realized prices. The segment's growth increasingly depends on rigorous transaction documentation and preservation of grower premiums.

Value share by cultivation Method, 2025



Source: XXX

Value by cultivation Method, USD bn

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

Source: XXX

By Packaging Format

Bulk formats of 10 kilograms and above lead because processors, food manufacturers, foodservice distributors and repackers buy quinoa by pallet, tote or container. Retail-ready packs generate higher revenue per kilogram and remain important for branded and private-label grocery programmes. Smaller resealable formats are gaining share in Asia-Pacific, where trial purchases and limited household familiarity favour lower pack weights.

Value by packaging Format, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Bulk and Industrial Packs	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Retail-Ready Packs	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By End Use

Household cooking remains the largest use through grain bowls, side dishes, salads and rice substitution. Food manufacturing is taking share as quinoa enters snacks, breakfast foods, bakery mixes, prepared meals and nutrition products. Foodservice demand benefits from premium bowl concepts and institutional menus, but purchasing remains more price-sensitive than branded retail.

Value by end Use, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Household and Retail Cooking	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Food Manufacturing	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Foodservice	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other Commercial Uses	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Distribution Channel

Direct B2B contracting dominates through shipments to manufacturers, importers and private-label packers. Supermarkets and hypermarkets provide the largest consumer-facing channel, supported by placement in rice, organic and health-food aisles. Specialist retailers sustain premium organic and fair-trade ranges, while e-commerce expands access to coloured varieties, origin-specific quinoa and larger value packs.

Value by distribution Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Direct B2B and Ingredient Distribution	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Supermarkets and Hypermarkets	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Specialist and Natural-Food Retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
E-commerce	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

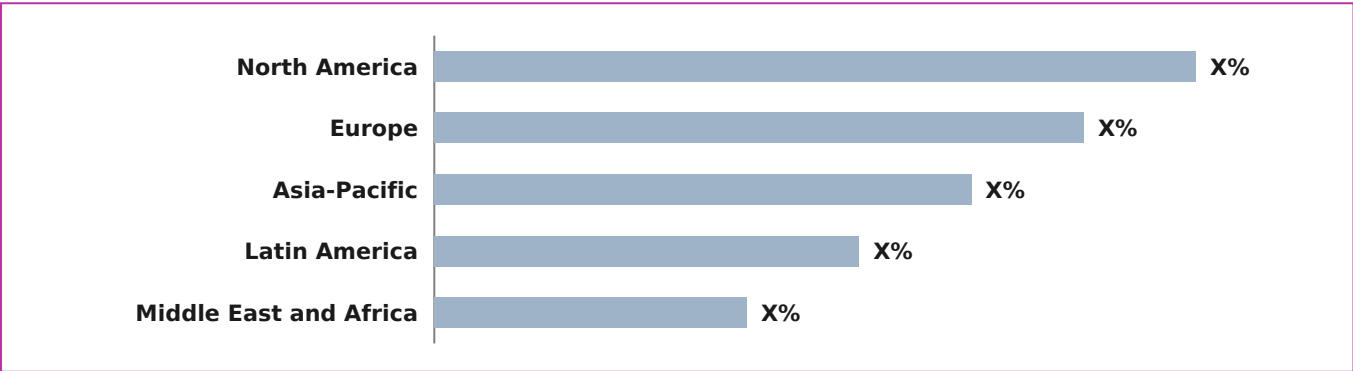
Quinoa Seeds Market Regional Analysis and Country Outlook

North America generated XX% of global quinoa-seed revenue in 2025. The United States anchors consumption through natural-food retail, club stores, private-label packs and industrial use in snacks, cereals and prepared meals, while Canada combines substantial consumer demand with a differentiated domestic crop and proprietary seed genetics. Regional growth is increasingly tied to value-added specifications such as pre-washed seed, verified gluten-free handling, low-saponin varieties and contract-grown North American origin.

Europe held XX% of 2025 value, led by Germany, the United Kingdom, France, the Netherlands, Italy and Spain. Organic certification, pesticide-residue management and importer due diligence have a particularly strong influence on supplier selection. The Netherlands and Spain also operate as processing and re-export hubs, while local cultivation programmes in the United Kingdom, France and the Netherlands strengthen origin diversity and shorten premium supply chains.

Asia-Pacific is forecast to expand at an XX% CAGR, the fastest regional rate. India is combining contract cultivation with packaged-food and ingredient innovation, while China, Japan, South Korea and Australia offer growth through premium supermarkets, e-commerce and nutrition-led meal formats. Latin America remains the production centre and a substantial consumption market: Peru's domestic market absorbs a majority of national production, while Bolivia retains a strong position in Royal Quinoa and certified organic exports.

Growth rate by region, 2025-2031



Source: XXX

Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Europe	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 and Africa	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

Quinoa Seeds Market Competitive Landscape and Company Share

The quinoa seeds market has low concentration: the five largest commercial suppliers controlled XX% of global value in 2025. Thousands of Andean growers feed a broad network of cooperatives, exporters, processors, importers and retail brands, while modern colour sorting, washing capacity and certification systems create a smaller tier of internationally qualified suppliers. Andean Valley, ANAPQUI, Agrofino, Alisur and Villa Andina are influential at origin; Ardent Mills and Above Food's NorQuin platform bring North American processing, genetics and ingredient-market access.

Competitive advantage is shifting from simple grain aggregation to specification control. Leading suppliers differentiate through farmer contracting, organic and fair-trade certification, low-water conditioning, allergen controls, colour consistency, cooking performance and direct delivery to food manufacturers. Branded participants such as Ancient Harvest and Alter Eco reinforce consumer recognition, while private-label growth gives origin processors an additional route to capture packaging margin.

Portfolio and capacity moves demonstrate continued strategic interest. Saco Foods acquired Quinoa Corporation, including Ancient Harvest, in 2024; Undercover Ingredients commissioned dedicated crisped-quinoa capacity in 2025; and Ardent Mills began reviewing strategic alternatives for its Yuba City quinoa facility. The next consolidation phase will centre on traceable grower networks, proprietary genetics, specialized cleaning assets and customer contracts rather than commodity volume alone.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Andean Valley Corporation	XXX	XXX	XXX	XXX
Agrofino Foods	XXX	XXX	XXX	XXX
Villa Andina S.A.C.	XXX	XXX	XXX	XXX
Ardent Mills	XXX	XXX	XXX	XXX
Above Food Corp. and NorQuin	XXX	XXX	XXX	XXX
Saco Foods and Ancient Harvest	XXX	XXX	XXX	XXX
Alter Eco Foods	XXX	XXX	XXX	XXX
The British Quinoa Company	XXX	XXX	XXX	XXX
GreenFood50	XXX	XXX	XXX	XXX
Queen's Quinoa	XXX	XXX	XXX	XXX

Source: XXX

Quinoa Seeds Market Forecast, Scenarios and Opportunities

The market will add USD XXX million between 2025 and 2031. Whole white quinoa will remain the volume engine, but above-market growth will come from organic seed, coloured varieties, locally grown origin programmes and industrial grades designed for puffing, crisping, milling or rapid cooking. Procurement will become more specification-driven as food manufacturers demand predictable hydration, texture and process yield.

The central forecast assumes stable Andean export availability, gradual price normalization after the 2024 recovery and continued category expansion in Asia-Pacific. An upside case reaches USD XXX billion by 2031 if Asian retail adoption accelerates and low-saponin genetics materially reduce processing costs; a downside case reaches USD XXX billion if repeated Andean weather disruption and weak consumer spending widen quinoa's price gap against substitute grains.

Winning suppliers will combine secure origin relationships with destination-market technical support. Investments in low-water desaponification, digital traceability, organic integrity, residue surveillance and application testing will produce the strongest customer retention. Companies that sell quinoa as a standardized functional input rather than an undifferentiated grain will capture a disproportionate share of incremental value.

Opportunities

- Low-saponin varieties requiring less processing water
- Contract-grown quinoa in Canada, Europe, India and the United States
- Premium red, black, royal and multicolour quinoa
- Private-label retail packs in Asia-Pacific and the Middle East
- Quinoa inputs for snacks, cereals, bakery and high-protein meals
- Digitally traceable organic and regenerative supply programmes

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