

# The European market potential for cowpeas

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The European market for cowpeas is small compared to other pulse markets, and imports have remained stable over the past five years. Consumption is driven by traditional cuisines in southern European countries, like Portugal, Italy and Greece. Demand also comes from the growing interest in plant-based and high-protein foods, driven by governments, health-conscious consumers and consumers concerned with sustainability. Cowpeas are a sustainable crop that have a relatively low carbon footprint.

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## 1. Product description

The cowpea (*Vigna unguiculata*) is a cream-coloured legume with a distinctive black spot, which is often referred to as a 'black eye'. As a result, cowpeas are also commonly known as the black-eyed pea or black-eyed bean. The black spot appears where the bean germinates. The black-eyed pea is a subspecies of the cowpea and is the most prevalent variety. Cowpeas have an earthy flavour with a hint of nuttiness and a soft yet firm texture.

The cowpea originates from West Africa and is widely produced and consumed throughout Africa. The world's largest producing countries are in Africa: Nigeria (42% of global production), Niger (29%), Burkina Faso (8.5%), Ghana (3.3%) and Mali (2.6%) ([FAOSTAT 2022 data](#)). Cowpeas are grown in some parts of America and Central Asia. In Europe, cowpeas are not as prevalent, but they are starting to grow in popularity.

Cowpeas are primarily used for human consumption and used in dishes like salads, soups, stews and curries. In southern European countries like Portugal and Greece, cowpeas are part of traditional recipes. Cowpeas are also popular in plant-based and high-protein diets due to their high protein content, making them a suitable meat substitute.

Cowpeas can also be used as:

- Animal feed.
- Soil improver: cowpea can be used in crop rotation systems. It helps build soil organic matter, carbon and can contribute to nitrogen fixation. It can also potentially reduce fertiliser use.

Cowpeas are categorised under the following Harmonised System (HS) code: 071335 – Dried, shelled cow peas (*Vigna unguiculata*), regardless of whether skinned or split.

Figure 1: Cowpeas or black-eyed peas/beans



Source: [GloballyCool](#), May 2024

## 2. What makes Europe an interesting market for cowpeas?

Europe is an interesting market due to several trends. The high demand for plant-based proteins is a major driver. This demand comes from consumers who want healthier and more environmentally sustainable food products. The promotion of plant-based proteins is also supported at the EU level and by national governments.

### European imports of cowpeas have remained stable

Over the past five years, cowpea imports into Europe have remained stable at a compound annual growth rate (CAGR) of 0.3%. Europe typically imports approximately 11,000 tonnes of cowpeas per year. However, there was a notable peak in 2022, with imports totalling 14,000 tonnes.

Most cowpeas are imported directly from developing countries. In 2023, developing countries exported 9,700 tonnes of cowpeas to Europe, reflecting an average annual growth rate of 2.9% over the past five years. Moreover, their import share has increased from 79% in 2019 to 88% in 2023.

Source: UN Comtrade, June 2024

\*Developing countries following [the OECD-DAC list of ODA recipients](#), “Rest of the world” refers to all other countries.

### Plant-based proteins become mainstream: healthy and sustainable

Globally, the demand for plant-based and healthy foods has risen in recent years, with more consumers seeking products that benefit their health and the environment. This trend is particularly strong in Europe. The sales of plant-based foods [increased by 21%](#) between 2020 and 2022. This trend is increasing the demand for cowpeas.

The global cowpea market is [predicted to grow by more than 5% on average per year](#) in the 2020–2030 period. The following factors drive the growth for cowpeas:

- Growing demand for plant-based proteins
- More people embracing a more plant-based diet (i.e. vegans, vegetarians and flexitarians)
- Health benefits: growing awareness of the benefits and properties of legumes. Cowpeas have favourable [nutraceutical](#) and nutritional properties
- Growing number of food processing companies focussing on adding plant-based proteins to their product offerings
- Social and economic production parameters: cowpeas’ stable production, productivity and resilience to environmental stressors (including drought)
- Favourable government initiatives that focus on increasing consumption of plant-based proteins

All these drivers are applicable to the situation in Europe, leading to a positive outlook for cowpeas in the European market. The trends and drivers in the European market are discussed further in the [trends section](#).

#### Tips:

To learn more about plant-based trends amongst European consumers, read the Smart Protein project reports: [Evolving appetites: an in-depth look at European attitudes towards plant-based eating](#). Either select the report on the European level or look into country specific reports (11 EU countries available). You can also watch the [Smart Protein Project webinars](#), also either on the [European level](#) or [country-specific webinars](#).

To find out more about how to enter the European market, read the CBI's study on entering the European market for cowpeas.

Read the [CBI's tips for doing business with European buyers of grains, pulses and oilseeds](#) to understand how to conduct business in the European market.

### 3. Which European countries offer the most opportunities for cowpeas?

Southern European countries offer opportunities for cowpea exporters because they traditionally consume a lot of pulses. This is particularly true for Portugal, where cowpeas are popular in traditional dishes. It is the leading importing country and has a market share of 30% of European imports. Other important southern European markets include Italy (16% of European imports), Greece (6.7%) and Spain (6.4%).

In addition to southern Europe, exporters from developing countries can target two northern European countries: the United Kingdom and the Netherlands. The United Kingdom is the second largest importer in Europe with a 20% share of imports, where ethnic communities and British consumers interested in [international dishes from across the globe](#) are the main consumers.

In addition to traditional bean consumption, growth can be expected from the increase in demand for healthy food, vegetarian/vegan food and plant-based proteins. For example, the Dutch government intends to promote plant-based proteins and boost bean consumption with the [#BEANMEAL](#) initiative.

Source: UN Comtrade, June 2024

#### Portugal: black-eyed beans popular in the traditional cuisine

With a market share of 30%, Portugal is Europe's largest importer of cowpeas. Over the past five years, Portugal's cowpea imports have grown at an average rate of 8.5% per year. Imports increased considerably in 2022, with volumes rising from 2,100 tonnes in 2021 to 5,700 tonnes. However, in 2023, the imported volume decreased to 3,300 tonnes.

Portugal sources 91% of its cowpeas from developing countries. Brazil is the main supplier, accounting for 60% of all imports. It is followed by Madagascar (14%), Argentina (9.6%) and Myanmar (7.1%). The organic market in Portugal is relatively small, so almost no organic cowpeas are available.

Cowpeas are widely available in Portuguese supermarkets. They mostly sell the variety black-eyed beans, known as feijão frade, both cooked (canned) and dried (packed). Well-known brands for canned beans include [Compal da Horta](#) and [Ferbar](#). [Caçarola](#), from Valente Marques, and [Cister](#) offer dried black-eyed beans. Black-eyed beans are marketed as a healthy food, high in fibre and protein.

Black-eyed beans are popular in Portuguese cuisine and used in a variety of traditional dishes, salads, such as [Salada de feijão-frade](#). According to [Caçarola](#), they are mostly used in codfish and tuna salads. Several brands, such as [Vasco da Gama](#) and [Ramirez](#), offer canned tuna with black-eyed beans. They are also added to soups, stews and rice. One popular dish is [Feijoada](#), a rich stew that includes various types of beans and meats.

Figure 4: Canned black-eyed beans in the Portuguese market



Source: [GloballyCool](#), July 2024

## United Kingdom: ethnic consumption as the main driver

The United Kingdom used to be the largest importer of cowpeas but dropped to second position in 2022. In 2019 and 2020, it imported the highest volumes in Europe, at approximately 3,500 tonnes. In the following three years, imports dropped to between 2,000 and 2,200 tonnes. The market declined by 11% in the 2019–2023 period.

Myanmar is the main supplier of cowpeas to the United Kingdom, accounting for 32% of total imports. Madagascar and Peru FOLLOW, with shares of 20% and 9.1%, respectively. Argentina is a new supplier to the British market. It started exporting small quantities in 2022, and now takes fourth position in the market (8.5%). Argentina has surpassed India, which provides 8% of imports.

Cowpeas are sold as black-eyed beans in mainstream supermarkets, mostly in canned form. They are often marketed under supermarkets' own labels, such as [Sainsbury's](#) and [Tesco](#). Supermarkets also offer dried black-eyed beans from different brands. Cowpeas can also be found in ethnic shops specialised in African, Caribbean and South-Asian foods, catering to the diverse culinary traditions in the country.

The British companies that supply these beans often specialise in ethnic foods. For example, [East End Foods](#) is a leading supplier of ethnic foods in the United Kingdom. It supplies black-eyed beans to ethnic stores and large supermarket chains, such as Tesco. [Tropical Sun](#) imports specific products like black-eyed beans and cow peas (Red Chori) for the UK's ethnic communities. Other British companies include [Cypressa](#), world food wholesale specialist [Surya Foods](#) (Laila brand) and [KTC Edibles](#).

## Italy: large demand from the canning industry

Italy is an important country for the bean processing industry: it has the largest bean canning industry in Europe. This is why it imports a lot of dry beans. In Italy, cannellini beans (white kidney beans) and berlotti beans (cranberry beans) are very popular, and they are the main varieties sold in the supermarket chains. Comparatively, cowpeas are not a staple in Italian cuisine nor are they readily available in large supermarket chains. Some supermarkets, such as [Coop](#) and [Eurospin](#), do sell dried black-eyed beans, albeit from only one brand.

Over the past five years, Italy has seen a slight upward trend in cowpea imports, peaking with 2,300 tonnes in 2022. In 2023, imports dropped to 1,800 tonnes. The average annual growth rate was 4.5%. Almost all cowpeas are imported directly from developing countries (96%). Italy relies on four countries for the supply of cowpeas: Myanmar (37% of its imports), Madagascar (27%), Brazil (23%) and Argentina (6.9%).

Italy also cultivates black-eyed beans, although in small volumes. For example, [Azienda Agricola del Monte Castello](#) cultivates and sells black-eyed beans. They use integrated production practices in a sustainable agricultural production system that has a lower environmental impact. [Cascina Bosco Fornasara](#) is an organic farm that uses a completely natural cultivation method, based on creating a synergy between nature and cultivation. They do not use any pesticides or agro-chemicals, which are not permitted by organic regulations.

## The Netherlands: strongest growth, high intra-EU imports

The Netherlands is the fourth largest importer of cowpeas (share of 9.2%) in Europe. Of the top six importers, the Netherlands shows the strongest growth. The imported volume increased from 418 tonnes in 2019 to 1,017 tonnes in 2023 (+25% on average), making the country the fourth largest importer in Europe in 2023.

The Netherlands imports no more than 56% of its cowpeas directly from developing countries; the lowest of Europe's leading importing countries. The main developing country is Myanmar, supplying 53% of Dutch cowpea imports. Dutch companies mostly rely on intra-EU trade, with cowpeas mainly coming from the United Kingdom (36%). Intra-EU trade increased by 47% in the 2019–2023 period, while trade from developing countries only

increased by 14% per year.

In February 2024, the Netherlands started a national initiative to boost bean consumption: [#BEANMEAL](#). Different actors in the supply chain have joined forces to make Dutch consumers more familiar with beans. This is a [Bean Deal](#) initiative, which itself is part of the [National Protein Strategy](#) of the Ministry of Agriculture, Nature and Food Quality (LNV). The goal is to ensure that more than 50% of the average Dutch diet consists of plant-based proteins and less than 50% of animal-based proteins by 2030.

Currently, the Dutch eat around 50 grams of beans per week, less than half the recommended amount. Most beans eaten by the Dutch are common varieties, like common beans. Black-eyed beans are a relatively new and unknown product on the Dutch market.

Cowpeas are sold through a variety of retail stores in the Netherlands. Mainstream supermarket chains mostly sell canned (conventional) cowpeas, but they also sell them in dried form. Cowpeas are not available in every supermarket in the Netherlands, but mainly in large outlets and outlets with relatively large ethnic food sections.

Black-eyed beans are also sold in ethnic food stores and specialised (online) stores. Examples of these stores are [Groentebroer](#) (specialised in fruits and vegetables) and [De Kruidenbaron](#) (specialised in spices and herbs).

Cowpea products of one particular brand, such as the dried and canned black-eyed beans offered by [Valle del Sole](#), can be found in a range market channels, from mainstream supermarkets like [Albert Heijn](#) and [Dirk](#), to ethnic food stores like [Tjin's International Foodstore](#).

Figure 5: Black-eyed beans on the shelves of an ethnic food store in the Netherlands



Source: [GloballyCool](#), July 2024

## Greece: mix of traditional and modern cuisine

In Greece, both canned and dried beans are consumed. However, dried beans are more popular for traditional dishes, which require consumers to soak and cook the beans themselves. Traditional dishes include Fasolada and Gigantes Plaki. [Fasolada](#) (bean soup) is a popular, national meal in Greek cuisine, which uses white beans. [Gigantes plaki](#) is a traditional dish of baked giant beans. Canned beans are available for convenience, when consumers have less time.

The situation for beans as in general also applies to black-eyed beans. Black-eyed beans are offered in various forms. Dried black-eyed beans are the most common. They are marketed by companies that focus on the sales of rice and pulses, such as [Agrino](#) and [3alfa](#). For convenience, black-eyed beans are also sold in other forms: frozen (by [Barba Stathis](#)), naturally steamed (by [3alfa](#)) and in authentic ready-to-eat meals (by [Paliria](#)).

Black-eyed beans are mostly marketed as healthy and nutritious food, rich in fibre, protein and manganese. They can be added to salads, soups and other healthy dishes.

From 2019 until 2022, Greece's imports of cowpeas showed an upward trend. However, in 2023, imports fell to 742 tonnes, marking a 48% decrease on the previous year. The peak in 2022 was caused by an abundant supply from Greece's main supplying country, Madagascar. Greek importers imported more than they needed, building up their stocks, resulting in lower imports in 2023.

Most cowpeas are imported from Madagascar (49%), followed by Myanmar (32%). Madagascar has consistently been the main supplier, whereas Myanmar's share is a recent development. The opposite is true for Peru. In the

2020 to 2022 period, Peru held an important share in the market but, in 2023, its share decreased to 9.7%. Greece only imports a small share from intra-EU sources, most importantly Spain (7.5%).

## Spain: large market for pulses

Spain is one of the largest markets for pulses in Europe; pulses are important in the traditional Spanish diet. Spanish consumers typically consume white and red kidney beans in stews and salads. Traditional dishes include bean stews, such as [Cocido](#) and [Fabada Asturiana](#). Spain cultivates pulses, but this production is not sufficient to cover domestic demand.

Black-eyed beans are the most popular in the Spanish region Extremadura. They are used in salads, stews, soups, but also added to meats and rice. Spanish companies that offer black-eyed beans include [Legumbres Luengo](#) (dried and cooked), [Goya](#) and [La Cochura](#). The latter offers the beans under its own brand and under private label for supermarket chains, such as [Alcampo/Auchan](#).

With a share of 6.4% of European imports, Spain is the sixth largest importer of cowpeas in Europe. Imports have fluctuated slightly over the past five years. Overall, imports decreased by 4.1% on average per year. In 2023, the total imported volume reached 704 tonnes. Madagascar was the leading supplier of cowpeas (51%), followed by Peru (19%), Madagascar (10%), the United States (8.5%) and Argentina (7.8%).

### Tips:

Explore the websites of major supermarkets in European countries to check whether and what cowpea products are sold. Identify the brands that offer cowpeas in these markets. Use this as a starting point to discover potential trade channels and buyers for cowpeas. Well-known supermarkets include [Pingo Doce](#) (Portugal), [Tesco](#) (the United Kingdom), [CosiComodo](#) (Italy), [Albert Heijn](#) (the Netherlands), [Sklavenitis](#) (Greece) and [Alcampo](#) (Spain).

Visit international trade fairs like [SIAL](#), [Anuga](#) and [BIOFACH](#) to learn about the trends in different European markets and find potential buyers.

## 4. Which trends offer opportunities or pose threats in the European cowpea market?

Cowpeas are healthy and nutritious. They fit well into plant-based and protein-rich food trends, driven by healthy and environmentally conscious consumers. Moreover, cowpeas have a relatively low ecological footprint, making them fit well with the environmental sustainability trend. Lastly, European consumers prioritise convenience, which has boosted the market of ready-to-use pulses and ready-to-eat meals.

### High demand for plant-based and protein-rich products

There is high demand for plant-based and protein-rich products in Europe. This demand is driven by different types of consumers. Where some consumers seek healthy lifestyles, others are concerned about the environment and thus choose plant-based proteins.

The growing number of people embracing more plant-based diets, whether vegetarian, vegan or flexitarian diet, is driven by growing concern for the environment and the health benefits associated with reducing meat consumption. The number of vegans [will continue to grow](#). Based on a study of 18 EU countries, this number is predicted to grow from around 6.62 million vegans in 2023 to 8.25 million in 2033. The demand for plant-based diets increases demand for plant proteins like pulses.

Protein-rich diets are also becoming more popular due to their perceived health benefits. A growing number of fitness and health-conscious consumers are turning to plant proteins. [Euromonitor's health and nutrition survey](#) reveals that the main reasons for following a high protein diet are health and fitness. This is especially true in big economies like western Europe. There has long been a misconception that animal-based proteins are superior for muscle growth and performance, but several scientific studies have shown the effectiveness and health benefits of plant-based proteins.

The growing popularity of meat and dairy substitutes drives growth for innovative plant-based products. Companies invest in research and development to create new products that mimic meat or provide an alternative to dairy products. For example, [Meat.The End](#) develops protein-rich ingredients that food manufacturers can use to mimic meat alternatives. It uses a range of sources: pea, chickpea and soy. [Better Pulse](#) has developed a cowpea protein concentrate that can be used for the alt-dairy industry.

Governments also want to stimulate the consumption of plant proteins. As mentioned before, the Dutch government wants to ensure that more than 50% of the average diet consists of plant-based proteins and less than 50% of animal-based proteins by 2030. The European Commission has called on Member States to formulate national protein strategies to meet the demand for plant proteins, to become less dependent on the imports of protein-rich crops and to increase self-sufficiency. The EU's Common Agricultural Policy (CAP) sets various measures to support the regional production of protein crops.

In light of the protein transition to make the European food system more sustainable, [Wageningen University & Research has set up a project to introduce west African cowpea as an ingredient and consumer food in the EU](#). This research highlights the untapped potential for cowpea flour as a functional ingredient, attributed to its high solubility and foam stability properties. The project focuses on exploring cowpeas' applications in dairy and bakery products, smoothies and as substitutes for meat. They can thus target new consumer groups that focus on healthy food, sustainable sourced food or with designated cultural origin.

## **Social and environmental sustainability is essential**

Social and environmental sustainability are key concerns in Europe. Companies throughout the value chain are increasingly focusing on sustainable pulses and transparency in the supply chain. This includes working conditions, water use and waste management. Sustainability is becoming a basic feature of every successful business. You will have better opportunities in the European market if you employ sustainability practices.

Environmental awareness of the ecological footprint of agriculture has also stimulated the search for more sustainable protein options. As a consequence, there is high demand for plant-based proteins. The production of plant-based proteins typically requires less land, water and energy than livestock farming.

If we look at the environmental aspects of cowpeas, there is relatively low environmental risk in the production of cowpeas. Greenhouse gas (GHG) emissions for the production of cowpeas is low. In comparison to other crops, their [GHG emissions are some of the lowest](#). Moreover, there is no loss of biodiversity. Cowpeas [provide biodiversity benefits when grown in mixed crop systems](#). They produce nectar that attracts and supports pollinators, making them particularly advantageous in cross-pollinated crop systems.

Another benefit is that cowpeas can build up soil organic matter, carbon and nitrogen fixation in crop rotation systems. They can thus potentially reduce fertiliser use. On the downside, the production of cowpeas requires a lot of water, more than chickpeas, for example, but less than dry beans. Moreover, there is a relatively high risk of deforestation.

Table 1: Environmental risks for cowpeas (green: low risk; yellow: moderate risk; orange: relatively high risk)



Carbon footprint	Water footprint	Deforestation risk	Biodiversity loss	Contamination
0.48 kg CO <sub>2</sub> eq/kg	6,906 m <sup>3</sup> /tonne	123,591 ha (2005–2018)	Not a high-risk area	Not a high-risk area

Source: [IUCN NL \(2022/2023\)](#). Sustainable plant-based food worldwide. A guide for value chain management in the protein transition.

The Israeli company [Better Pulse](#) has tapped into the sustainability and plant-based protein trend. The company has come up with an invention for the protein market: making protein from cowpeas. With this invention, it wants to secure the protein supply chain in the face of climate change and global warming. The low carbon footprint, low fertiliser requirements and innate heat tolerance make cowpea highly resilient and sustainable. The cowpea protein concentrate can be used for the alt-dairy industry to make plant-based milk and yoghurt. It has a higher protein content than other plant-based milk alternatives.

## Organic

Most cowpeas sold in the European market are conventional. Less than 10% are organic certified. Unfortunately, there is no specific data available on the size of organic cowpea market in Europe. [Transparency Market Research](#) reports that, globally, around 90% of the cowpeas are sold as conventional. However, the demand for organic cowpeas is expected to grow at a 7% CAGR during the 2020–2030 period. Within Europe, the largest organic markets for cowpeas are the United Kingdom, the Netherlands and Italy.

In Africa, where most cowpea production occurs, virtually all production is conventional. One example of a company that claims to offer black-eyed beans that are cultivated organically is [NBO Vanilla](#) in Madagascar. However, when checking the company’s offer, it does not offer organic-certified black-eyed beans: only conventional beans. Outside Africa, a few producers and online shops sell organic-certified black-eyed beans to international clients, such as [Atmeygida from Turkey](#), [GREAT Alimentos Orgánicos from Mexico](#) and [Bright Organik from India](#). However, the production and export volumes of organic-certified cowpeas remain low.

## Convenience calls for more value-added products

European consumers are increasingly prioritising convenience due to their busy lifestyles, which leave them with less time to shop, cook and eat. This trend drives higher demand for convenience foods.

For modern consumers, preparing cowpeas from their dried form is challenging because they take a lot of time to cook. It especially takes long if you want to pre-soak the cowpeas. As a result, supermarkets also sell canned cowpeas (e.g. [Sainsbury’s Black Eye Beans](#)) and cowpeas in glass jars (e.g. [Pingo Doce Feijão Frade](#)). This saves consumers time as the cowpeas are already cooked and ready to use.

There are also examples of cowpeas products that have even more added-value. For example, [3alfa](#) from Greece has developed their [steamed black-eyed beans](#), which are prepared naturally to preserve their nutrients. These cowpeas can be served as a healthy snack or added to dishes. With this product, the company caters to two trends: the demand for convenient products and healthy eating.

For consumers who do not have the time to prepare meals, different brands offer ready-to-eat meals. For example, [Paliria](#) offers its ON YOUR SIDE ready-to-eat meals series, with [spicy black-eyed beans with red peppers and vinegar dressing](#). This product is ready to serve and can be eaten hot or cold.

Figure 6: Ready-to-eat meal with black-eyed beans





Source: [GloballyCool](#), July 2024

## Ethnic and traditional food

Both traditional European dishes and ethnic foods can contribute to the consumption of cowpeas. In southern European countries, cowpeas are used in the local cuisine. The increasing multicultural population in Europe brings new culinary options to the market, creating a market for ethnic foods. In addition, exposure to foreign cuisines through international travel is an important factor that drives the growing demand for ethnic foods.

The British market [Tesco](#) has revealed a new trend of cooking adventurous global meals at home. The British population is increasingly preparing international dishes and exploring different flavours from around the world. In response, Tesco has expanded its range of 'World Foods' by 35%. The supermarket chain inspires its customers with in-aisle displays that showcase Middle Eastern, Latin American, Japanese, Korean and Caribbean dishes.

Cowpeas are a staple in many cuisines so they can be sold to different types of consumers in Europe: those who use cowpeas in traditional ways, and those who enjoy experimenting with new international dishes.

### Tips:

Stay up to date on news and innovations in the plant protein market. For example, check out the website [New Protein](#), which focuses on alternative proteins.

Find out more about sustainability in our [tips on how to go green in the grains, pulses and oilseeds sector](#).

Find out more about social sustainability in our [tips on how to become a socially responsible exporter of grains, pulses and oilseeds](#).

Learn more about trends by reading the CBI study [Which trends offer opportunities or pose threats on the European grains, pulses and oilseeds market?](#).

[GloballyCool](#) carried out this study on behalf of the CBI.

Please review our [market information disclaimer](#).