

What is the demand for grains, pulses and oilseeds on the European market?

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Grains, pulses and oilseeds are major commodities widely cultivated and traded within Europe. The market for major staple food and feed is mainly supplied by nearby producing countries and multinational companies. Organic crops, products with specific nutritional benefits – including ancient grains – and those targeting specific ethnic groups offer the best opportunities for small and medium-sized suppliers from developing countries.

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1. What makes Europe an interesting market for grains, pulses and oilseeds?

Market size and dependence on external suppliers make Europe an attractive target market for suppliers from developing countries. The European countries that present the most opportunities overall are Spain, Italy, the UK, the Netherlands, Germany and Poland.

Although Europe is home to the production of certain types of grains, pulses and oilseeds, the region still needs to import a lot of other types. The dependence on imports, combined with the shift towards sustainable and nutritional crops, makes Europe an interesting market for nearby producers of staple crops as well as for suppliers with a unique product that meets European demand.

Scope of products and regions

This study covers the sectors of grains, pulses and oilseeds. Within the grains and oilseeds sector, the focus lies on products that are applied in the food sector, i.e. meant for human consumption. For this reason, a few commodities, such as soybeans, maize and barley, are not included in the product selection for this study.

The selected products still have a range of applications that is wider than the food sector only, from feed (for example, sorghum and some oilseeds) to industrial uses like biofuels.

'Europe' in this study refers to the countries of the European Union, plus the UK and the EFTA countries (including Switzerland, Norway, and more).

'Developing countries' are all countries of the [OECD-DAC list](#).

Europe's mature and diversified market offers stability for suppliers

Europe is a mature and diverse market for grains, pulses and oilseeds. It is home to:

- 3 of the 10 largest importing countries of grains in the world: Italy, the Netherlands and Germany.
- 3 of the 10 largest importing countries of pulses in the world: Italy, Germany and Spain.
- 6 of the 10 largest importing countries of oilseeds in the world: the Netherlands, Bulgaria, Germany, Spain, Italy and France.

Since several of the large markets in the world have their own large-scale production of grains, pulses and oilseeds (such as the USA) and therefore import relatively low volumes, Europe is among the largest importing regions worldwide. The largest importing regions however are outside Europe: East Asia for grains and oilseeds, and Southeast Asia for pulses. Europe as a whole is good for 22% of the world's grains imports, 42% of oilseeds imports, and 19% of the global pulses trade.

Figure 1 shows that imports from East and Southeast Asia take a considerable share of the global market. This is mostly because the countries in those regions don't have a lot of their own wheat production and therefore need to import wheat from abroad.

Source: UN Comtrade (July 2023)

Grains - local supply dominates

Most of the grains imported by Europe come from local production within Europe. Over the years there has been some fluctuation in import volumes, mainly caused by fluctuations in local production volumes. Such fluctuations in production volumes and thus also trade volumes are visible for [individual countries](#) as well (see for example Figures 10, 11 and 12). In 2018-2022, total European imports were relatively stable, at 52 million tonnes per year.

The share of imports from developing countries has been rather stable, at 7-9% per year until 2021, but went up to 13% in 2022. This was caused by a sharp increase of European imports of wheat from Ukraine and a substantial growth of rice imports from Myanmar.

Source: UNComtrade (July 2023)

European imports of grain are dominated by Italy and Spain in Southern Europe and Germany, the Netherlands and Belgium in Western Europe. Together, these five countries represent 63% of European imports. Most countries' top import product is wheat, followed at a distance by rice. For a few countries, the second-largest product is different: Italy (durum wheat), the Netherlands (wheat flour), Germany (oats), Poland (unroasted malt). France is Europe's largest grains producer, therefore the country's largest import product is not wheat, but rice.

Pulses - imports from developing countries are needed

Pulses come from both local production in Europe and imports from outside Europe. The largest product in this subsector is dried peas, accounting for one-third of total European imports. The products that follow in second and third place, dried broad beans and dried kidney beans, make up another third of European imports.

Over the period under review, most striking is the declining imports of pulses from developing countries (-8.7% per year on average). The share of developing countries in European imports stood at 23% in 2018 but went down to 18% in 2022. This was caused by a gradual decline in European imports of peas from Ukraine. These stood at 280,000 tonnes in 2018, which was an unusually high volume compared to other years. After 2018, pea imports from Ukraine went down and the war made the situation even worse. As a result, imports from Ukraine reached a record low of 31,000 tonnes in 2022.

Growth in imports of pulses from other developing countries was not able to compensate for the large decline in imports of peas from Ukraine. Most notably, growth was recorded by Argentina and Egypt with kidney beans (+37,000 and +23,000 tonnes), Turkey with dried peas, chickpeas and lentils (+49,000, +10,000 and +4,500 tonnes), and India with dried lentils and vigna mungo beans (+4,500 and +5,500 tonnes).

Source: UNComtrade (July 2023)

Intra-European trade was the only trade flow with a plus in the period under review (+1.4% per year). This was mainly due to a more-than doubling of broad beans exports from the UK to other European countries, most notably France, Norway, the Netherlands and Denmark.

Oilseeds - sunflower seeds dominate trade

Around 70% of the oilseeds imported by Europe come from local production within Europe. Since the largest oilseed commodity, soybeans, is not covered in this survey, the largest commodity in this subsector is sunflower seeds, accounting for 75% of total European imports.

This largest commodity of the group, sunflower seeds, was also the reason for the remarkable growth of the developing country share in total imports in 2022. This share showed a slightly upward trend between 2018 and 2021, but went up considerably in 2022, reaching 44%. This was related to the war in Ukraine, which led to a large disruption of the traditional export routes of Ukrainian sunflower oil in 2022. One of the effects of that disruption was a large growth of Ukrainian exports of sunflower seeds to Europe, from only 63 thousand tonnes in 2021 to 1.9 million tonnes in 2022.

Source: UNComtrade (July 2023)

The second largest commodity in this subsector is groundnuts, typically imported from developing countries. The other important product in this subsector that mostly comes from developing countries is sesame seeds.

The largest importing countries for oilseeds in Europe are those countries that import large volumes of sunflower seeds: Bulgaria, Hungary, Romania and Spain. The Netherlands is also a large importer of sunflower seeds but also imports large volumes of groundnuts and other oilseeds. For the rest, most striking is Greece's position as the largest importer of sesame seeds in Europe.

Forecast: volumes to remain stable

Overall, for the foreseeable future Europe will remain dependent on imports of various grains, pulses and oilseeds from developing countries. This is despite EU policies that prioritise self-sufficiency and sustainable production of, for example, protein crops. The [new agricultural policy of the EU \(CAP\)](#) entered into force in 2023. It incorporates the sustainability goals of the [European Green Deal](#) as well as the [Farm to Fork](#) and [biodiversity](#) strategies.

Especially niche products that are not produced locally and which fit into the trend towards healthy and more sustainable foods will remain in demand. Popular products that predominantly come from developing countries include quinoa, teff, fonio and dried Adzuki beans. The largest market impact in the short-to-medium term will be related to misharvests in large production countries, caused by drought. In 2023, for example, the [drought in Argentina](#) resulted in lower production of Adzuki beans than in previous years.

More important is the market forecast that prices will go up due to higher costs of production in origin countries and in European destination markets. Especially the inflation in European end-markets can be a serious threat to the European consumption of grains, pulses and oilseeds. [Recent Eurostat figures](#) on inflation show that for consumers in the European Union, bread and cereals were on average 10% more expensive in August 2023

than in October 2022.

The high inflation will mostly have a negative impact on products that are in the high-end segment, such as organic-certified grains, pulses and oilseeds; products with added value such as teff, quinoa and fonio; and those that have been produced and packed in the origin country.

Figure 5: Organic-certified gluten-free puffed quinoa in a Dutch health food store (September 2023)



Source: [GloballyCool](#)

While European imports are likely to continue increasing at moderate rates over the next years, their growth rates are expected to remain lower (between 1-3% per year) than in other world regions (between 2-5% per year). These regions include South and Southeast Asia, where economic and market growth have been much higher on average in the past decade.

Tips:

Read the [OECD-FAO Agricultural Outlook 2023-2032](#). These reports give interesting ideas for the world's demand and production concentration and trade as a share of demand in 2032. They are available for many different commodities, including [cereals](#), [oilseeds](#) and [pulses](#).

Watch out for a potential overreaction when there is a year with insufficient supply. After such years, farmers may try to increase their production to a level that will result in an oversupply. This ripple effect may turn around market perspectives dramatically.

See [what trends offer opportunities or pose threats](#) on the European grains, pulses and oilseeds market.

Inform yourself about the strict rules of the European market by reading [what requirements grains, pulses and oilseeds must comply with](#).

Stay up-to-date through [browsing data and analysis of the USDA Foreign Agricultural Service](#), follow [news on World-grain.com](#), and check out the [European Commission's short-term and medium-term outlook](#).

Above-average import growth for sustainably produced grains, pulses and oilseeds

The largest organic food markets in Europe are Switzerland, Germany, France and Italy. Some specific statistics for organic grains, pulses and oilseeds are available: the most traded and consumed products after organic-certified soybeans are cereals other than wheat and rice, followed by rice, oilseeds, wheat and flours.

The latest [report on imports of organic products in Europe](#) shows the recent performance of EU imports of organic food products, including grains, pulses and oilseeds. Imports of organic cereals increased by 6.8% to a volume of 121,000 tonnes in 2022 (113,000 tonnes in 2021). Imports of organic rice increased too, by 7.5% in 2022 to 93,000 tonnes in 2022. Imports of organic oilseeds (other than soybeans) registered a sharp annual decrease, from -36% to 93 thousand tonnes (145,000 tonnes in 2021).

The organic cereals and rice market has shown above-average growth. This is in line with the trend in Europe with consumers turning to organic food products. Almost every year over the past decade, the organic grains, pulses and oilseeds market has grown faster than the conventional market. The year 2022 was different: with the high inflation consumers bought less expensive products. The fact that organic cereals and rice imports still grew, shows that despite the economic slowdown there is still a huge potential in the European organic market.

As an indication of the export potential to individual European countries, Figure 6 shows the number of organic-certified importers of grains, pulses and oilseeds for use in food in the most important European countries. France, Italy and Germany have by far the highest number of organic-certified importers.

Source: EU Commission database (July 2023)

*For each product, the total number of companies with import activity is included. Companies that cover several products are counted more than once and up to five times.

**Switzerland and the UK are not included, since their markets are not part of the European Union and therefore do not require EU Organic Certification.

A large number of organic-certified importers in a country indicates market opportunities for organic produce, since importers need to be certified for trading organic produce. Therefore, the best opportunities for organic produce exports are in the EU markets displayed in Figure 6.

In addition to organic-produced food, there is also a growing commitment of consumers to ethically and sustainably produced food. The most important certification scheme with this focus is Fairtrade. As this market is based on the certification scheme, traders can only trade Fairtrade-certified products if they have a certification too. Fairtrade-certified products are usually found in the medium-to-high-end food retail segment, but Switzerland and also some British retail chains have low-to-medium-end products with a Fairtrade certificate.

Figure 7: The Swiss market as exception – Private-label products with a Fairtrade certification – Basmati rice



Source: [GloballyCool](#)

The largest markets for Fairtrade products are Germany and Switzerland. One important Fairtrade-certified cereals and oilseeds trader in Germany is [EcoTerra](#).

Source: Fairtrade database (July 2023)

Germany has the highest number of Fairtrade-certified traders (30 traders), followed by Switzerland (24 traders) and France (17 traders). These countries offer the most potential for exporters of Fairtrade-certified grains and oilseeds.

Tips:

Consider organic as a speciality. If your region is not suitable for organic production, focus on the cleanest produce possible and consider other sustainability standards.

Read about the organic legislation in CBI's study on [European buyer requirements for grains, pulses and oilseeds](#).

Read about developments in Fairtrade in the [Fairtrade Annual Report 2022](#).

2. Which European markets offer most opportunities for grains, pulses and oilseeds?

The main European markets for grains, pulses and oilseeds providing opportunities for exporters from developing countries are Spain, Italy, the UK and the Netherlands, as these countries import large volumes from developing countries. Two other countries that still import less from developing countries but are interesting in terms of opportunities are Germany and Poland.

These six markets combine certain characteristics – mainly sizeable imports of grains, pulses and oilseeds from developing countries, total market size, and relevance of organic or Fairtrade market segments. Figure 8

displays the total combined import volumes of grains, pulses and oilseeds per European country.

Source: UNComtrade (July 2023)

Figures 10, 11 and 12 show the import volumes of grains, pulses and oilseeds per European target country (the previously mentioned six countries) for imports coming from developing countries.

UNComtrade (September 2023)

UNComtrade (September 2023)

UNComtrade (September 2023)

Tips:

Study your options in the large import markets of the Netherlands, Spain, Germany, Poland, the UK and Italy. A good way to reach a decision regarding these markets is to visit European trade fairs. Start with the leading trade fairs in Europe: [Anuga](#) in Cologne (Germany), [Sial](#) in Paris (France) and [Biofach](#) in Nuremberg (Germany). Another trade fair where you may find good trading partners is [Fi Europe](#) in Frankfurt (Germany), which is dedicated to food ingredients.

Diversify your markets to spread risks, so try to focus on at least a few countries from different regions.

Find out who the major food retailers are in each European country at [Retail-index.com](#). Use our [tips for finding buyers](#) to learn how to find the right entry to the European market.

Spain: largest importer from developing countries

Legumes play an integral role in Spain's traditional Mediterranean diet. Dry legumes dominate the market, compared with jarred or canned products; however, canned legumes have registered a steady increase over time, most likely due to eating habits changing towards ready-to-eat products. The increased interest in consumption, plant-based diet trends, and the limited domestic supply of dry beans open opportunities for exporters.

Spain is a net importer and the largest market for pulses in the EU, but the share of direct imports from developing countries is still relatively low. Spain's total grains consumption in 2023 is currently projected at [34.5 million metric tonnes](#), 75% of which goes to the animal feed industry (not covered in this survey). Spanish imports of wheat represent 59% of its total grains, pulses and oilseeds imports worldwide.

Spain is the top importer of grains, pulses and oilseeds from developing countries. This is mostly due to leading positions for the products, as shown in Table 1.

Table 1: Products of developing country origin for which Spain has a top-3 import position in Europe

Largest importer	Second-largest importer	Third-largest importer
sorghum, various cereal flours, miscellaneous oilseeds, maize groats and meal	wheat, durum wheat, rye, various cereals, maize flour, cotton seeds, canary seeds.	dried kidney beans, dried lentils, dried chickpeas

Source: UNComtrade (September 2023)

Spain is an important trade partner of Portugal and France, which also contributes to its high ranking as an importing country. Spain is a leading European destination for the following products from developing countries:

- Wheat, rye and sorghum from Ukraine (1 million, 59,000 and 12,000 tonnes in 2022, Ukraine's largest destination within Europe).
- Rice, sunflowers seeds and chickpeas from Argentina (90,000, 33,000 and 3,600 tonnes, largest destination), kidney beans (34,000 tonnes, second largest destination)
- Rice from Myanmar and Pakistan (124,000 and 53,000 tonnes)
- Rice and groundnuts from Brazil (21,000 and 9,500 tonnes)
- Maize starch and dried broad beans from Egypt (8,300 and 1,100 tonnes)

Spain is also becoming a producer of some specialty grains, including quinoa and teff. The Spanish company [Salutef](#), for example, sells different 'made in Spain' teff products. Nevertheless, some of the products do indicate that they are not produced in the EU, like in the case of amaranth flour. Companies like Salutef might want to source complementary healthy products to their range, buying imported goods. This can be an opportunity for producers of speciality grains with added value.

Spain is a small market for organic- and Fairtrade-certified products. This is also reflected in its low number of certified organic and Fairtrade traders (11 and 2, respectively). Most organic-certified products are sold in organic supermarkets like Veritas.

Italy: biggest importer of wheat and pulses from developing countries

Italy has a grains and pulses sector that is distinctive in many ways. According to the Foreign Agricultural Service (FAS), Italy is by far the largest rice producer in the EU, [accounting for approximately 53% of production](#). The country also produces soybeans. Renowned for its pasta, Italy is a significant consumer of durum wheat but pasta producers are increasingly using other ancient, gluten-free grains and pulses for their pasta production.

Figure 12: Chickpea spaghetti, product of the Italian specialised gluten-free pasta producer Andriani



Source: [GloballyCool](#)

Italy is among Europe's largest importers of grains and pulses. A small portion (about 10%) of these products are re-exported. Italy is the second-largest importer of grains, pulses and oilseeds from developing countries. This is mostly due to leading positions for the products, as shown in Table 2.

Table 2: Products of developing country origin for which Italy has a top-3 import position in Europe

Largest importer	Second-largest importer	Third-largest importer
wheat, durum wheat, dried kidney beans, dried lentils, frozen peas, germ of cereals, cotton seeds	dried peas, sorghum, dried chickpeas	maize starch, buckwheat, dried beans, canary seeds, frozen leguminous vegetables.

Source: UNComtrade (September 2023)

Italy is an important trade partner of Germany and France, which also contributes to its high ranking as an importing country. Italy is a leading European destination for quite a lot of products from developing countries globally.

- Wheat, sorghum and peas from Ukraine (358,000, 6,200 and 5,900 tonnes in 2022)
- Kidney beans and groundnuts from Argentina (40,000 and 23,000 tonnes)
- Rice from Myanmar, Pakistan, India, Vietnam, Guyana and Cambodia (118,000, 88,000, 18,000, 32,000, 24,000 and 14,000 tonnes)
- Wheat and durum wheat from Kazakhstan (167,000 and 101,000 tonnes, largest destination)
- Kidney beans from Ethiopia and China (8,200 and 5,700 tonnes, largest destination)
- Durum wheat from Turkey (46,000 tonnes, sole destination), plus chickpeas and lentils (10,000 and 6,700 tonnes)
- Sesame seeds from Brazil (2,200 tonnes), groundnuts from Egypt (15,000 tonnes), chickpeas from Mexico (4,700 tonnes) and durum wheat from Lebanon (3,200 tonnes, sole destination)

The size of the gluten-free market also provides opportunities for alternative grains, such as [quinoa](#), [teff](#) and [fonio](#). Fonio was authorised as a food by the European Union after the Italian company [Obà](#) applied for it.

Italy is a large market for organic-certified grains, pulses and beans, but not important for Fairtrade-certified products. This is also reflected by the high number of organic-certified and low number of Fairtrade importers in Italy. Most organic-certified products can be found in the health food segment in the shelves of organic retail chains like [Bio c' Bon](#) and [NaturaSì](#).

United Kingdom: large market for rice and chickpeas

The growing trend of 'clean eating' and veganism in the UK, coupled with the large population of people from diverse cultural backgrounds, has driven the need for pulses, lentils, peas and beans. Products such as chickpeas and kidney beans are only produced in limited volumes in the country, so food companies [import 60,000 tonnes of chickpeas annually](#) for products including standalone tins, pouches of cooked chickpeas and packets of dried pulses.

The UK is among Europe's largest importers of grains and pulses. About 40% of these products are re-exported, either directly (transit trade) or after processing. The UK ranked third among the major importers of grains,

pulses and oilseeds from developing countries in 2022 (equal to 37% of total imports). This is mostly due to leading positions for the products, as shown in Table 3.

Table 3: Products of developing country origin for which United Kingdom has a top-3 import position in Europe

Largest importer	Second largest importer	Third largest importer
frozen beans, rolled or flaked cereals, dried beans, copra, dried peas, dried leguminous vegetables	maize flour, dried adzuki beans, maize groats and meal, wheat flour, dried chickpeas, dried lentils, wheat gluten, rice, groundnuts	millet, various cereal flours, other processed types of cereals, germ of cereals, frozen leguminous vegetables

Source: UNComtrade (September 2023)

The UK is an important trade partner of Ireland and the Netherlands, which also contributes to its high ranking as an importing country. The UK is a leading European destination for the following products from [CBI countries](#):

- Rice and beans from Myanmar (77,000 and 3,600 tonnes in 2022)
- Rice, wheat flour, beans, chickpeas and lentils from India (150,000, 10,000, 7,400, 7,000 and 4,100 tonnes, largest destination)
- Rice from Pakistan and Thailand (78,000 and 39,000 tonnes)
- Beans and wheat from Turkey (52,000 and 10,000 tonnes, largest destination), rice and chickpeas (6,000 and 4,200 tonnes, second-largest destination)
- Groundnuts from Brazil and Nicaragua (18,000 and 14,000 tonnes, largest destination)
- Various cereals and beans from Peru (2,500 and 700 tonnes)

Since Brexit in 2020, the direct import of grains, pulses and oilseeds from developing countries has not increased remarkably. The UK officially left the EU on 31 January 2020 (Brexit). This has increased the administrative burden for EU exporters to the UK and has made trade slower and more expensive. It has had a positive impact on the direct import of certain products from developing countries, but not so much yet for grains, pulses or oilseeds.

The UK is an especially good market for Fairtrade-certified oilseeds. There are 11 Fairtrade-certified importers in the country. The organic market in the UK is also rather developed, with good opportunities for exporters from developing countries. [WholeFoods](#) and [PlanetOrganic](#) are two specialised organic retail chains in the UK.

Tips:

Keep up-to-date with non-EU free-trade agreements with the UK on the [GOV.UK website](#). Another page gives [updates on the EU-UK trade agreement](#).

Find potential clients in the organic market through the [Organic Tradeboard](#).

The Netherlands: number-one destination for groundnuts

The Netherlands holds a significant role in the European food product supply chain, functioning as a hub for the wholesale distribution of goods. It is among Europe's largest importers of grains and oilseeds. Many of these

products are re-exported, either directly (transit trade) or after processing. The Netherlands is in the top 4 of largest importers of grains, pulses and oilseeds from developing countries. This owes mostly to leading positions for the products, as shown in Table 4.

Table 4: Products of developing country origin for which the Netherlands has a top-3 import position in Europe

Largest importer	Second largest importer	Third largest importer
groundnuts	various cereals of miscellaneous processed types, dried beans, soybean flour and meal, roasted malt	dried adzuki beans, various oilseeds, wheat gluten, sesame seeds, poppy seeds

Source: UNComtrade (September 2023)

The Netherlands is an important trade partner of its neighbouring countries Belgium and Germany, which also contributes to its high ranking as an importing country. The Netherlands is a leading European destination for the following products from [CBI countries](#):

- Groundnuts from Argentina (249,000 tonnes in 2022, largest destination), Brazil and Nicaragua (17,000 and 12,000 tonnes, second-largest destination).
- Rice from India, Thailand and Cambodia (78,000, 37,000 and 31,000 tonnes)
- Beans and kidney beans from Myanmar (3,500 and 800 tonnes)
- Peas from Moldova (500 tonnes) and sesame seeds from Pakistan (1,400 tonnes)
- Peas, lentils and chickpeas from Turkey (2,300, 5,800 and 2,100 tonnes)

With a lot of international trade experience and strong European distribution networks, Dutch companies are good prospects for businesses that aim to enter the European market with niche products. The country is a prominent trader of lesser-known grains and oilseeds. It is the third largest importer in Europe of [sesame](#) and niche oilseeds like [chia seeds](#) from developing countries, and plays a significant role in the trade of ancient grains such as [quinoa](#), [teff](#) and [fonio](#) with [Tradin Organic](#), [Do-It Organic](#) and [Rhumveld](#) as important players for such products.

The Netherlands is a small but growing market for organic- and Fairtrade-certified grains, pulses and oilseeds. Organic-certified grains, pulses and oilseeds are sold in organic and health retail chains like [Odin](#) and [Ekoplaza](#), and increasingly in mainstream supermarkets like [Albert Heijn](#), [Jumbo](#) and [Poiez](#).

Germany: a significant millet importer

Germany has the largest economy and the largest population of all European countries. It is the world's biggest producer of rye and is both a large consumer of speciality grains with added value and a key exporter of these products. In 2022, total German imports reached 226,000 tonnes. They declined with a CAGR of -3.9% between 2018 and 2022, mainly caused by the high inflation in 2022 that resulted in lower spending on food.

Germany is among Europe's largest importers of oilseeds. Many of these products are re-exported, either directly (transit trade) or after processing. Germany does not currently stand among the leading EU importers of grains, pulses and oilseeds from developing countries. However, there is good potential in the market. Germany is already an important destination for several products from developing countries, as shown in the following table.

Table 5: Products of developing country origin for which Germany has a top-3 import position in Europe

Largest importer	Second largest importer	Third largest importer
millet, other processed types of maize, soybean flour and meal, canary seed, dried lentils, mustard seeds, various cereals, frozen peas	wheat starch, sesame seeds, various oilseeds, frozen leguminous vegetables, wheat groats and meal	maize flour, oats, other processed types of oats, dried leguminous vegetables, rolled or flaked cereals

Source: UNComtrade (September 2023)

Germany is an important trade partner of the Netherlands and Italy, and a leading European destination for the following products from [CBI countries](#):

- Millet, mustard seeds and maize starch from Ukraine (8,900, 8,100 and 4,900 tonnes in 2022)
- Groundnuts from Argentina and Nicaragua (40,000 and 4,600 tonnes)
- Sunflower seeds from Moldova (8,500 tonnes) and rice from Vietnam (9,800 tonnes)
- Rice, groundnuts, sesame seeds and wheat flour from India (32,000, 3,600, 3,100 and 2,600 tonnes)
- Lentils, sunflower seeds and chickpeas from Turkey (9,600, 5,700 and 3,300 tonnes)
- Groundnuts and sesame seeds from Egypt (9,400 and 2,000 tonnes)
- Sesame seeds from Nigeria, Uganda, Guatemala and Mozambique (4,500, 2,900, 2,700 and 2,200 tonnes)

Germany is the largest market in Europe for organic and Fairtrade-certified food products. It is home to a lot of organic-certified importing companies (150, but some companies may be double-counted) of grains, pulses and oilseeds. Germany also has the largest number of Fairtrade-certified importing companies (9 for cereals and 21 for oilseeds). Some organic retail chains in Germany are [Biomarkt](#), [DM](#) and [Alnatura](#).

Tip:

Visit Europe's most important food trade events taking place in Germany, like [Anuga](#) and [Biofach](#).

Poland: main destination for poppy seeds

Poland is among Europe's largest importers of grains and oilseeds. Most of these products are re-exported, either directly (transit trade) or after processing. While Poland does not rank among the leading EU importers of grains, pulses and oilseeds from developing countries, the country demonstrates significant potential. Poland is already an important destination for several products from developing countries, as shown in the following table.

Table 6: Products of developing country origin for which Poland has a top-3 import position in Europe

Largest importer	Second-largest importer	Third-largest importer

poppy seeds	wheatstarch, other processed types of cereals, other processed types of maize, buckwheat	unroasted malt, rolled or flaked oats, mustard seeds
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Source: UNComtrade (September 2023)

Poland is an important trade partner of Germany and the Netherlands, which also contributes to its high ranking as an importing country. Poland is a leading European destination for the following products from [CBI countries](#):

- Durum wheat, peas and wheat flour from Ukraine (20,000, 14,000, 9,000 tonnes in 2022, largest destination) and wheat, rye, millet and sorghum from Ukraine (503,000, 17,000, 8,100 and 7,700 tonnes, second-largest destination)
- Groundnuts from Argentina (57,000 tonnes, second-largest destination) and poppy seeds from China (3,300 tonnes)
- Rice from Myanmar, Brazil and Guyana (65,000, 12,000 and 8,200 tonnes)
- Durum wheat and mustard seeds from Kazakhstan (12,000 and 2,500 tonnes)
- Sunflower seeds and sesame seeds from Turkey (4,200 and 2,100 tonnes)
- Sesame seeds from Nigeria, Mozambique and Somalia (2,100, 900 and 700 tonnes)

Poland is a small market for organic-certified products, but home to quite a number of organic-certified companies that are also classified as importer. Many of these companies manufacture products for other countries in Western Europe, such as Germany and Switzerland. This position is reflected by the relatively large number of organic-certified importing companies (53 but some companies may be double-counted) of grains, pulses and beans.

3. Which products from developing countries have most potential on the European market for grains, pulses and oilseeds?

This chapter highlights six promising products to give you an idea of the potential in the European market: cereal flours, adzuki beans, mung beans, rice, kidney beans, and rolled or flaked grains. This product selection is based on the performance of European (EU27 + United Kingdom + Switzerland) import volumes from developing countries, combined with a review of market trends.

Opportunities in the European grains, pulses and oilseeds market

The specific opportunities for your grains, pulses and oilseeds will highly depend on your supply capacities, including volume, quality, pricing and certification. These aspects will define your target market and market segment. If we look at the European import volumes from developing countries, the grains, pulses and oilseeds with a strong performance in 2018-2022 are:

- Flours of other cereals than wheat and maize
- Adzuki beans
- Dried mung beans (*Vigna radiata*)
- Semi-milled or wholly milled rice
- Dried kidney beans
- Rolled or flaked grains of other cereals than oats

An important opportunity also lies in the situation that the number of supplying countries for certain grains, pulses and oilseeds and their quality levels may be too limited for certain European buyers. These buyers may therefore be open to new alternatives that could help spread supply risks. Although several countries are important suppliers of grains, pulses and oilseeds, most individual countries supply only a limited range.

Table 7: High-potential grains and pulses imported by Europe* from developing countries, import volume, in thousand tonnes (2018-2022)

	2018	2019	2020	2021	2022	CAGR**
Cereal flours (excluding wheat and maize)	10.9	11.5	13.2	15.9	17.2	11.9%
Dried Adzuki beans	1.9	2.3	2.6	2.3	2.8	9.8%
Dried mung beans (Vigna radiata)	19.8	22.4	26.9	26.9	28.0	9.0%
Semi-milled or wholly milled rice	858	869	947	797	1,198	8.7%
Rolled or flaked grains of cereals (excluding oats)	2.0	2.3	2.9	2.6	2.4	5.1%
Dried kidney beans	202.3	215.6	255.4	218.2	243.5	4.7%

Source: UNComtrade (July 2023)

*Europe = EU27 + United Kingdom + Switzerland + Norway

**CAGR = compound annual growth rate

Tip:

Read CBI's market studies on several other potential products: [chia seeds](#), [chickpeas](#), [dried lentils](#), [fonio](#), [quinoa](#), [sunflower seeds](#) and [value-added grains, pulses and oilseeds](#). There are many opportunities for developing-country suppliers of many grains, pulses and oilseeds, simply because Europe depends on imports.

Cereal flours not made of wheat and maize

Flours of a heterogeneous group of cereals - including barley, oats, rye, sorghum, millet and others - offer opportunities for exporters from many different developing countries. In 2022, direct imports from developing countries to Europe totalled 17,200. The import volume has increased by 12% annually since 2018.

France (3,800 tonnes), Spain (3,200 tonnes) and the UK (2,500 tonnes) form the top-3 destinations, with a total share of 56% of European imports. Germany, the Netherlands and Belgium import smaller quantities (2,100, 1,400 and 1,200 tonnes, respectively).

Gluten-free flours are made of oat, sorghum and millet, for example. These flours are a key ingredient of gluten-free products, which are essential for individuals with gluten-related disorders, such as celiac disease, wheat allergy, and non-celiac gluten sensitivity. Europe is one of the world's largest markets for gluten-free flours and the market will continue to grow in the next five years, as every year many Europeans are diagnosed with celiac disease.

The gluten-free market has a relatively low concentration. Within Europe, there are a few brands with region-

wide distribution (such as [Schar](#) from Italy and [Orgran](#) from Australia), but most brands produce mostly for their own market. Virtually each European country is home to producers of gluten-free products, resulting in more high-quality gluten-free items readily available in Europe than ever before.

Table 8: Top developing countries supplying cereals flours to Europe

Supplying country	Export volume (thousand tonnes)	CAGR 2018-2022
Thailand	6.7	+6.2%
Brazil	2.2	From 0 in 2021
India	2.1	+9.1%
Ukraine	1.1	+25%
Cambodia	0.8	+9.6%
Vietnam	0.6	+14%
Argentina	0.5	from 0 in 2018
Senegal	0.5	-0.5%
Pakistan	0.5	+29%
Morocco	0.3	+54%

Source: UN Comtrade (September 2023)

Tip:

Read more about the European market potential in the [CBI study on healthy snacks](#).

Dried Adzuki beans

Adzuki beans originate mainly in Eastern Asia, and are more popular in Asian cuisines. The Japanese use adzuki beans primarily to make the sweet paste 'anko', similar in consistency to peanut butter; they also use it as a filling in pastries and a topping for desserts, especially ice cream. Adzuki beans are widely used in various culinary applications.

Figure 13: Dried adzuki beans from Ethiopia



Source: [GloballyCool](#)

The European market relies mainly on imports from developing countries. In 2022, direct imports of dried adzuki beans from developing countries to Europe totalled 2,700 tonnes. The import volume has increased by 10% annually since 2018.

Italy is Europe's largest importer of dried adzuki beans, accounting for 406,000 tonnes in 2022, most importantly because Italy has a large bean-canning capacity. The Italian bean-canning industry is a leader in Europe, making Italy the world's biggest supplier of prepared and preserved beans. This is also the reason why Italian adzuki beans imports are high. Some Italian canners are [Gusto Sano](#), [Suma Cooperative](#) and [Bioltalia](#).

The UK came in second place (403,000 tonnes) in 2022, which is related to its relatively high consumption of beans per capita, along with a relatively large diaspora of Asians living in the country. Note that the UK is the largest market for canned beans from Italy. This may change in the years to come if trade from European Union countries loses competitiveness against other options (including local canning in the UK itself).

Table 9: Top developing countries supplying dried adzuki beans to Europe

Supplying country	Export volume (thousand tonnes)	CAGR 2018-2022
Argentina	1,200	+34%
China	0.7	-9.1%
Ethiopia	0.2	+38%
Kyrgyzstan	0.2	+17%
Turkey	0.2	+45%
Uzbekistan	0.05	+19%
Ukraine	0.04	+30%

India	0.04	+28%
Peru	0.03	+36%

Source: UN Comtrade (September 2023)

Adzuki beans contain virtually no fat or cholesterol and have high levels of fibre, protein and iron. This, together with the growing European demand for vegan protein, will be an important driver of market growth in the coming years. Argentina and China are both important suppliers of organic-certified Adzuki beans to the European market. Most organic Adzuki beans are sold through the specialised organic food retail segment.

Tip:

Read more about the European market potential in the [CBI study on dried beans](#).

Dried mung beans (*Vigna radiata*)

In contrast to other grains and oilseeds, the mung bean market in Europe remains relatively modest in size. Europe does not cultivate mung beans due to their need for warm growing conditions, which are primarily found in Eastern Asia. Consequently, Europe depends on imports to satisfy demand.

Mung beans are a rich source of plant-based protein, which is important for people on vegetarian and vegan diets. As the number of vegetarians/vegans (and flexitarians, consumers who don't eat meat every day anymore) grows every year, the demand for plant-based protein sources like mung beans is set to increase in the next few years.

Table 10: Top developing countries supplying mung beans to Europe

Supplying country	Export volume (thousand tonnes)	CAGR 2018-2022
Myanmar	9.0	0.0%
India	8.2	+31%
Argentina	3.3	+23%
China	3.0	-11%
Thailand	0.7	+13%
Turkey	0.7	+26%
Uzbekistan	0.6	+31%

Venezuela	0.5	+27%
Nigeria	0.4	+575%
Ethiopia	0.3	+140%

Source: UN Comtrade (September 2023)

EU imports of dried mung beans from developing countries amounted to 28,000 tonnes in 2022. The import volume has increased by 9% per year since 2018. The UK is the top importer (14,400 tonnes), accounting for more than half of the European import volume, followed by the Netherlands and Belgium.

The UK is home to a diverse population with various cultural backgrounds, plus the largest diaspora of South Asians in Europe: predominantly Indians, Pakistani and Bangladeshi. Many of these cultures (mainly Indian) incorporate mung beans into their traditional recipes. Therefore, the import of mung beans helps meet the needs of the country's different ethnic communities.

Sprouting companies are the most important part of the trade channel in the EU. They import green mung beans, produce sprouts, pack and sell them – mostly to the retail, but also to the food service segment.

Within the retail segment, about half is sold through mainstream retailers like [Ahold Delhaize](#) (Albert Heijn and several other brands in the Netherlands, Belgium, Luxembourg, Czech Republic, Greece, Portugal and Romania), [Edeka](#) (Germany), [Carrefour](#) (France) and [Tesco](#) (UK).

The other half is sold through ethnic Asian supermarkets like the retail chains [Wing Yip](#) (UK), [Tanger Markt](#) (Netherlands, France and Spain), [Amazing Oriental](#) (Netherlands), [GoAsia](#) in Germany, and many smaller, independent stores.

Tip:

Read more about the European market potential in the [CBI study on dried mung beans](#).

Semi-milled or wholly milled rice (white rice)

Europe rice production in [eight countries located in the Mediterranean region](#) is good for approximately 50% of European demand. The rest is imported from Asian countries. While whole grain rice is considered healthier due to its higher fibre and nutrient content, the preference for white rice in Europe is largely influenced by culinary traditions and consumer preferences.

Figure 14: White rice from Vietnam



Source: [GloballyCool](#)

European imports of white rice from developing countries reached 1.2 million tonnes in 2022. The import volume has increased by 8.7% annually since 2018. Italy was the top importing country (192,000 tonnes) in 2022, followed by France, the Netherlands and the UK (186,000, 133,000 and 111,000 tonnes).

Table 11: Top developing countries supplying white rice to Europe

Supplying country	Export volume (thousand tonnes)	CAGR 2018-2022
Myanmar	360	+19%
Thailand	234	+0.7%
Cambodia	204	-2.5%
India	139	+11%
Pakistan	112	+2.4%
Vietnam	94	+55%
Guyana	18	+91%
China	17	+69%
Suriname	3.8	+22%
Argentina	3.4	+25%

Source: UN Comtrade (September 2023)

Since rice is a very common product in Europe, it is also one for which organic-certified products are more easily available, especially in the food retail segment. Mainstream supermarkets in Western Europe often have one or several organic-certified rice SKUs (stock-keeping units) in their range: [Albert Heijn](#), from the Netherlands, has a total of 9 SKUs online (in physical outlets this number is typically lower).

Overall, the best opportunities for organic-certified rice are in Western Europe, mostly in Germany, Switzerland, France and the Netherlands. The most important Fairtrade markets for rice are the UK, Switzerland and Germany.

Tip:

Read more about the European market potential in the [CBI study on specialty rice](#).

Dried kidney beans

Most kidney beans are imported directly by buyers in European countries. Overall, transit trade within Europe is rather limited but mostly takes place in Italy, Belgium and the UK. For that reason, these three countries have the most potential destination markets within Europe.

European imports of dried kidney beans from developing countries reached 233,000 tonnes in 2022. The import volume has increased by 4.5% annually since 2018. Italy and Spain were the top importing countries (64,000 and 38,000 tonnes) in 2022, contributing to more than 40% of total EU imports from developing countries.

The Italian bean-canning industry is one the largest in Europe, and because local availability of raw material is limited, Italian dried kidney beans imports are quite high. Note that the UK is the largest market for canned beans from Italy. This may change in the years to come if trade from European Union countries loses competitiveness against other options (including local canning in the UK itself). Spain, on the other hand, is a traditionally large consumption market of kidney beans.

Table 12: Top developing countries supplying kidney beans to Europe

Supplying country	Export volume (thousand tonnes)	CAGR 2018-2022
Argentina	120	+9.5%
Egypt	39	+22%
Ethiopia	27	+4.3%
China	16	-23%
Ukraine	15	+10%
Turkey	5.1	+24%

Brazil	3.6	+22%
Kyrgyzstan	3.4	-21%
Madagascar	2.1	-3.8%
Mexico	1.8	+19%

Source: UN Comtrade (September 2023)

Organic dried kidney beans are commonly available in Europe as consumers seek healthier and more sustainable options. Most organic kidney beans are sold in special organic supermarkets like [Ekoplaza](#) and [Odin](#) in the Netherlands, [Biomarkt](#), [DM](#) and [Alnatura](#) in Germany, [WholeFoods](#) and [PlanetOrganic](#) in the UK, [Veritas](#) in Spain and [Bio c' Bon](#) and [NaturaSi](#) in Italy. In the past few years, the organic range of mainstream supermarkets has also grown considerably, and their share in total organic beans sales has gone up.

Tips:

Read more about the European market potential in the [CBI study on kidney beans and other common dry beans to Europe](#)

Rolled or flaked grains of cereals (other than oats)

Rolled and flaked cereals are often considered healthy breakfast options. In many European countries, rolled and flaked cereals have been a part of traditional breakfasts for generations.

Figure 15: Teff flakes in a 750-gr pouch available in a Dutch webshop



Source: [GloballyCool](#)

European imports of rolled or flaked grains of cereals from developing countries reached 2,300 tonnes in 2022.

The import volume has increased by 5.3% annually since 2018. The UK is the top importing country with 1,100 tonnes in 2022, contributing to nearly half of total European imports from developing countries.

Table 13: Top developing countries supplying rolled or flaked grains to Europe

Supplying country	Export volume (thousand tonnes)	CAGR 2018-2022
India	1,200	+9.3%
Ukraine	451	-2.2%
Brazil	302	+9.7%
China	113	-12%
Peru	99	+21%
Malawi	84	From zero
Lebanon	28	-13%
Vietnam	25	+31%
Bolivia	20	-22%
Nepal	16	-1.4%

Source: UN Comtrade (September 2023)

Tip:

Read more about the European market potential in the CBI study on [healthy snacks](#).

Globally Cool carried out this study on behalf of CBI.

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