

# The European market potential for common dry beans

The biggest markets for common dry beans in Europe include Italy and the United Kingdom, traditional consumer groups and the dominant bean canning industry. Recent developments in convenience products and the increasing popularity of plant proteins give an optimistic view to beans’ growth potential. Food companies have been making beans more attractive to consumers and European buyers have become more interested in new supply sources, quality and bean diversity.

## Contents of this page

- 1. [Product description](#)
- 2. [What makes Europe an interesting market for common dry beans?](#)
- 3. [Which European countries offer most opportunities for common dry beans?](#)
- 4. [What trends create opportunities or risks in the European common dry beans market?](#)

## 1. Product description

The common bean (*Phaseolus vulgaris*) is native to the Americas, but has a long history of cultivation worldwide. Similar to other beans, the common bean is high in starch, protein and dietary fibre.

Dry beans are the mature seeds from a shelled bean pod which are dried after harvest. Besides their use as dry beans, some varieties are also sold as snap beans including the pod or pods with immature seeds.

In Europe, dry shelled beans are generally sold dried, pre-cooked in cans or as an ingredient in ready-made meals, salads and soups. In more specialised outlets, you can also find bean flour and extract, mostly from white beans. For canned beans, see the [CBI study on exporting canned beans and pulses to Europe](#).

The common bean is a species with lots of varieties that include the kidney bean (named after its kidney shape), the navy bean and the pinto bean. There are many subvarieties in various sizes and colours.

This study focuses on exporting dry kidney beans and white pea beans (*Phaseolus vulgaris*) and all subvarieties under product code 071333300 of the international [Harmonized Commodity Description and Coding System](#).

Table 1: Typical common beans in the European market

Most common	<ul style="list-style-type: none"><li>• Light red kidney bean, also known as common kidney bean</li><li>• Dark red kidney bean, which is deep reddish brown</li><li>• White kidney bean, also known as <i>cannellini</i> in Italy</li><li>• White pea beans or navy beans, which are small white oval</li><li>• Pinto bean, which are mottled beige and brown, closely related to the red kidney bean</li></ul>
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Regular or specific/typical local	<ul style="list-style-type: none"> <li>• Small red bean</li> <li>• Black bean</li> <li>• Great Northern bean, named <i>haricots lingots</i> in France</li> <li>• Berlotti beans or Cranberry beans, which are speckled and common in Italy</li> <li>• Caparrones, which are smaller than the red kidney bean and common in Spain</li> <li>• Flageolets or green kidney bean, which is common in France</li> </ul>
Less common	<ul style="list-style-type: none"> <li>• Light speckled kidney bean</li> <li>• Red speckled kidney bean</li> </ul>

Source: Eurostat (Comext)

## 2. What makes Europe an interesting market for common dry beans?

### Common dry beans are the most popular dry bean variety in Europe

Common beans such as kidney beans are the most popular dry bean consumed in Europe. After dried peas, the common bean is also the biggest dried leguminous vegetable imported into Europe. With common and kidney bean varieties you will have the best chance to enter the high-volume dry bean market.

Common dry beans are some of the most common dried, leguminous vegetables for import (excluding soybean, which is often regarded as oilseed crop). In 2018 more than 416 thousand tonnes of common dry beans have been imported. With this volume kidney beans leave imports of other bean varieties far behind, such as mung beans (23 thousand tonnes), cow peas (12 thousand tonnes) and other beans of the *Phaseolus* and *Vigna* varieties (34 thousand tonnes).

The varieties of common dry beans in European retail sales can be diverse, varying from red kidney beans to white navy beans and also typical European varieties such as French flageolets. All these are available both dried and in cans.

#### Tips:

Make sure you can offer consistent quality and volumes when targeting high-volume markets. Most bulk dry bean buyers are experienced and have worked out an efficient, problem-free supply chain.

Do store checks in Europe to find out which varieties are sold by different retail chains throughout Europe and how they are presented.

### Underdeveloped consumption and import dependence provide opportunities for common dry bean suppliers

Consumption of common dry beans can be much more promoted in Europe as dry pulse consumption is

relatively low. With pulses becoming more popular as an affordable protein source and with a high dependence on external bean suppliers, it is important to keep monitoring the market and be ready for when demand rises.

### **Attractive pricing can push up the stable supply**

While import volume has been relatively stable, the value of common beans decreased during the last three years. This indicates that prices have become more attractive for buyers of dry beans. These lower prices can be an incentive to increase bean purchases, contributing to market development and consumption.

### **Low pulse consumption leaves room for growth**

The European consumption of common beans is low compared to the rest of the world. It also means the potential consumption is far from saturated and the sector can benefit of this underdeveloped market by creating new ways of promoting dry beans.

A rough estimate indicates an average annual consumption of 0.8 kg of common beans per capita in Europe. This is not much when considering the common bean is one of the main dry beans for human consumption in Europe. It is also a fierce contrast to the largest consuming regions, among which [are western Kenya, Rwanda and Burundi, where people eat almost their body weight in beans every year: approximately 50–60 kg](#). Consumers in these countries depend on pulses as their principle source of protein.

In the United States, consumption of common beans was an estimated [2.3 kg per capita in 2016](#), mainly thanks to the popularity of pinto beans. It is uncertain to what extent foreign influences, for example from the United States, can change European habits. Either way, the underdeveloped consumption of kidney beans and other beans leads analysts to believe there is room for growth.

### **Europe depends on imports**

Europe's dry pulse production is mainly focused on dry peas and fava beans, which are often destined for animal feed. Only very few common and kidney bean varieties are produced locally, which means that most of these beans are imported. A very minor volume is re-exported, making Europe a net importer of 398 thousand tonnes of kidney beans. In short, when the demand for kidney beans increases, so will imports.

Figure 2: European imports of common dry beans in value and volume



Source: Eurostat, Market Access Database

### Tip:

Use the [Helgi Library data about beans](#) to roughly compare different countries' per capita consumption.

## Bean flour and white beans are popular in new product launches

Pulses are becoming more popular as an ingredient in new product launches. The most popular bean ingredients in the context of market development for common dry beans are bean flour and white beans. Product diversification is a good sign of a developing market, but selecting the right variety can be challenging.

In the 2012 to 2016 period, [beans in general were most often applied in new pulse products](#), namely in 25.7%. Specific common bean varieties were used in 9.2% (black beans) and 6.8% (kidney beans) of the new product launches with pulses.

The number of European [product launches with pulses grew](#) between 2010 and 2014. The period recorded a total of 921 product launches with bean ingredients in the most important bean consuming countries. According to Mintel research, bean flour and white beans were the most used beans, followed by black beans and pinto beans.

In the 2010 to 2014 period, the following number of products were launched:

- 380 product launches with bean flour;

- 203 with white beans;
- 191 with black beans;
- 105 with pinto beans;
- 48 with adzuki beans (not a common bean variety!);
- 19 with white bean flour;
- 5 with navy beans.

Bean flour is popular for sandwiches, wraps, bread and bread products. White beans, black beans and pinto beans are often launched as vegetables or in prepared meals.

A [trade report of the United States dry bean council](#) confirmed the interest in legume flours and fractions (proteins, fibres, starches) in different trade fairs in Europe in 2014. Large ingredient manufacturers, such as [Ingredion](#), have meanwhile developed pulse-based flours.

Innova Market Insights points out that [plant-based claims on products, such as plant proteins, have increased by 62%](#) globally between 2013 and 2017 (CAGR). At Anuga 2019, Innova said that legumes are seen as one of the top foods in people's diets for the long term. The demand for healthy proteins and fibres is still going strong, although kidney beans are not always the first choice.

### Tips:

Verify exactly which type of dry bean your buyer wants. Sometimes beans can be interchanged, but in other cases the characteristics need to be more specific. It is best to send a representative sample of your product before a large shipment.

Understand the differences between similar beans in taste and size, for example, comparing the white bean varieties of brands such as [Camellia](#) and [Bonduelle](#), or look up [The Bean Institute](#) and the [US Dry Bean Council](#).

## Europe is interested in new reliable sources

European buyers are looking into new supply sources, while important suppliers, such as China, are losing market share. These changing trades create opportunities for you as a supplier, if you are able to compete on volume and price. Countries with many smallholder farmers face extra challenges in terms of reliable and consistent exports.

## Lower exports from China create opportunities for other suppliers

China has a fast developing internal market and their exports to Europe are decreasing. For example, Chinese dark red kidney beans no longer control the Italian canning market as they did, while North-American suppliers have taken over with consistent and superior quality and [forward contracting](#).

European buyers admit having interest in finding new reliable sources besides China, especially organic beans. But they also look close to home within Europe or nearby in Ukraine. China's common dry bean exports to Europe have gone down almost 50% between 2014 and 2018 to 44.4 thousand tonnes. Ukraine has profited most and expanded its supply in the past five years from 0.5 to 10.2 thousand tonnes in 2018.

## Successes and failures at linking traditional suppliers to the European market

For traditional producers of beans, often smallholders, it is not easy to enter the global supply chain of kidney beans. Small farmers must be well organised in commercial producer groups to do so. Selina Wamucii is a Kenyan company that has been bringing smallholder produce to international markets successfully, for example,

trading [common dry beans from Tanzania](#).

But projects to help build sustainable supply chains with smallholders do not always work out. A [development project](#) to help bean farmers in Ethiopia between 2008 and 2011, for example, trying to link new intermediaries and unorganised farmers to formal markets proved to be a complex process. Buyers are not rarely reluctant to work with new suppliers, especially those from a new-source developing country.

Nevertheless, buyers are also keen on new sourcing options for dry beans. As a supplier, you should try to look for those buyers more willing to work with small farmers, for example, fair-trade oriented companies, such as [Rapunzel](#) or [Suma](#). When dealing with traditional, sceptical buyers, you must be able to assail their concerns by assuring reliable and competitive supplies.

### Tips:

Learn more about your competition in the CBI study about entering the European market for common dry beans.

Find potential buyers among the members of pulses associations, such as [The Global Pulse Confederation](#), or searching through the exhibitors at large food trade fairs, such as [Anuga](#) and [SIAL](#).

Be prepared to work with forward contracts, agreeing on a fixed volume and price, but also be prepared to comply with any supply contract you make. Non-compliance can have serious consequences for your reputation as exporter.

## 3. Which European countries offer most opportunities for common dry beans?

Traditional bean consuming countries in Europe are in the Mediterranean region, including Italy, Spain, Portugal and France. The United Kingdom leads in bean consumption in Northern Europe, a region which is generally open towards new food products and more focused on convenience. Other opportunities are almost equally divided between consumption countries in the east and trade countries in the west.

Table 2: Product launches containing beans in EU countries with relevant bean consumption 2010–2014

Country	2010	2011	2012	2013	2014	Total
France	30	40	47	60	40	217
UK	33	36	45	60	25	199
Spain	11	11	22	63	38	145
Germany	11	19	17	32	24	103
Italy	6	9	3	27	18	63

Ireland	2	0	4	12	14	32
Netherlands	3	4	2	11	11	31
Poland	0	1	1	12	7	21

Source: [Agriculture and Agri-Food Canada](#)

## Italy: Leader in importing and canning common dry beans

Italy is the largest of importer of common dry beans in Europe: 122 thousand tonnes in 2018. Exporters looking into supplying to the bean processing industry will find the best chances in Europe in Italy.

Dry beans used to be an important food source for Italian consumers, but [consumption has decreased over the past decades](#) partly replaced by canned beans. Typical Italian beans such as white kidney beans (*cannellini*) and cranberry beans (*berlotti*) are still popular gourmet products.

The real opportunity for exporters can be found in the processing industry. 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 dry bean imports are high. The United Kingdom is the biggest market for Italian canned beans, including products such as baked navy beans. Germany comes second.

Companies such as [Gruppo La Doria](#) are crucial to maintaining Italy's lead position in processed beans, such as canned baked beans, red kidney beans and ready-made bean soups, like traditional *minestrone*. The company claims to have produced 230 thousand tonnes of pulses in 2017.

Despite the processing capacity, Italy is not the most innovative country when it comes to new product development. However, Italy's longstanding experience is expected to propel the country into a bigger role in the near future. More importantly for exporters, Italian processors depend heavily on imported beans.

### Tip:

Read the CBI study about [exporting canned beans and pulses to Europe](#) if you want to export canned beans.

## United Kingdom: a broad market

The United Kingdom is an important market for kidney beans and navy beans. As an exporter you can find opportunities in different market segments such as new and healthy product launches, convenience products and traditional foods.

Kidney bean imports to the United Kingdom slightly dropped in the last five years, but still reached 89 thousand tonnes in 2018. This close in volume to Italy and at least double the size of any other European country.

Kidney beans are part of traditional consumption in the United Kingdom. A large community of Indian descent consumes especially red kidney beans, while navy beans are largely consumed as *baked beans*, a typical British dish of white beans in sauce. [British and Irish people are the largest consumers of baked beans](#) in the world, respectively 5.6 and 4.8 kg per capita per year.

Non-traditional consumption growth is an extra impulse for product development. Between 2010 and 2014, 199 products containing beans were introduced to the British market. Although many products focus on the consumer interest in convenience products, some of the innovations, such as [organic kidney beans](#) or [snacks with bean flour](#), cater to consumers who want to eat healthier. The UK market for vegan and gluten-free products is also developing, with organisations such as [Diabetes UK actively promoting pulses](#) for their nutritious benefits.

Traditional consumption of canned and dry beans will remain as the principal market for red kidney beans and navy beans. But other market segments, such as vegan and healthy, can also be interesting to explore. In these segments, you must pay extra attention to quality and consider organic production.

### Tip:

Decide which market you are able to supply to in the United Kingdom. For example, large bulk importers and processors have more demand for big volumes of navy beans. Small and more specialised companies will be a better target for specific beans for new and healthy product launches. Beware that product requirements for different market segments may be very different.

## Spain: common beans as traditional food

Spain is an important consumer of common beans and one of the main producing countries in Europe, yet most of its supply is imported. Exporters of both white and red kidney beans have potential opportunities in Spain, thanks to the country's cuisine, much like in Italy and the UK.

Spaniards consumer white and red kidney beans generally in stews or salads. Spain has typical local varieties, such as *caparrón*, a red kidney bean variety, but imported kidney beans are widely available as well.

Legumes are a fundamental part of a traditional diet in Spain, one of the largest consumers of pulses in Europe. Approximately 29% of Spain's pulse consumption consists of beans, slightly less than chickpeas and lentils. Nevertheless, changing consumer habits have [decreased consumption of dry beans in favour of canned beans](#); their volumes became similar in 2016-2017.

Pulses continue to play an important role in traditional Spanish food, making Spain one of the main producing countries in Europe. Irrigated cultivation supports 60% of Spain's dry beans production, which is therefore more stable than chickpeas and lentils. Kidney beans and common dry beans (*Phaseolus vulgaris*) productions [increased to 19.7 thousand tonnes in 2017](#), twice the volume of 2012. But this volume is still much too low to fulfil the demand in Spain.

The dependence on external supply is significant: more than 50% of the demand for pulses and even two-thirds of the demand for dry beans. This scenario will continue to provide a market for exporters, although the demand is shifting gradually towards the canning industry.

Kidney bean exporters from Latin America, such as those from Argentina and Bolivia, have an advantage due to a shared language and historic trade ties with Spain, their most significant European market.

### Tip:

Spain is a traditional market, so try to present beans to Spanish buyers which are similar to the beans Spanish consumers are used to. Look into some of the Spanish local varieties on [Mundosabor.es](#) (in Spanish).



## Portugal: imports replace local production

Portugal is a traditional consumer of kidney beans and Europe's fourth-largest importer. Portuguese demand for affordable beans will continue, meaning there are especially opportunities for price competitive suppliers.

Common beans, such as red kidney beans, are the most popular pulse for consumption in Portugal, where they are used in traditional stew dishes, such as *feijoada*, rice dishes (*arroz de feijão*) and soup. At an annual 4 kg of pulses per person, Portuguese per capita consumption is well above the European average.

In Portugal, local production has been replaced with imports. For the past five, years Portuguese kidney beans imports have varied between 30 and 40 thousand tonnes. In spite of Portugal having [extensive genetic bean resources](#), it will take time to revalue and increase cultivation again.

Compared to other European markets, Portuguese import value of kidney beans is relatively low in relation to its volume. Portugal's calculated import value was €0.75 per kg in 2018, while the European average was €0.9 per kg.

## France: Number one in bean-based product launches

France is among the top importers of common dry beans in Europe. French consumers have a general preference for locally produced pulses, but active promotion of pulses and bean-based product development will benefit consumption growth and keep demand up for quality foreign supply.

Recent data into the French market indicates that more than [85% of French consumers do not eat the recommended amount of lentils and pulses](#). This may change after the [French National Health and Nutrition Programme \(PNNS in French\)](#) endorsed consumption of pulses, recommending consumers to eat legumes and pulses at least twice a week.

National promotion of pulses are a welcome helping hand to the new products being introduced in French market. France performs extremely well in product development, launching [217 new bean-based products between 2010 and 2014](#). This was more than any other European country, including other important consuming countries, such as the United Kingdom (199 product launches) and Spain (145 product launches).

Interest in using beans as ingredients is strong in France, but according to buyers, demand is stronger for locally produced and organic pulses. France produces typical local beans such as flageolets, but also a minor volume of white and dark red kidney beans. However, much of the needed volume, especially kidney beans, has to come from abroad. As an exporter, keep in mind that the French market favours quality over quantity.

### Tip:

When targeting the French market try standing out on quality, for example, supplying certified organic beans.

## Eastern Europe: Bulgaria and neighbouring markets

Pulses are part of the food culture in many Eastern European countries. Bulgaria offers good opportunities for common dry beans, but you can find similarities throughout the region. Eastern Europe's markets are slowly diversifying in terms of suppliers and imported products, but developing local production could play an important role for future export opportunities to these countries.

With an import volume of 19 thousand tonnes in 2018, Bulgaria is the leader in importing common dry beans in the central and eastern parts of Europe. Current consumption figures are not available, but for dry beans they are expected to be similar to the [4.5 kg to 4.9 kg per capita](#) of previous years (2010–2013). Unlike many buyers in Western Europe, Bulgarian buyers gets most of their non-EU supply from Egypt and Kyrgyzstan. Compared to Western Europe, consumers in Eastern Europe may be more conservative and price conscious, but [the region is slowly developing towards a more diverse pulse market](#).

When supplying to Bulgaria, you should also consider exporting to the following nearby markets, which import the following volumes from non-EU origins:

- Romania: 15 thousand tonnes
- Hungary: 7.6 thousand tonnes
- Poland: 5.8 thousand tonnes
- Czech Republic: 3.5 thousand tonnes

Production volumes of dry beans in Eastern Europe have increased significantly between 2014 and 2017, especially in the Baltic countries, between 268% and 496%, Bulgaria (162%), Poland (30%) and Hungary (20%), taking advantage of the new [Common Agricultural Policy's \(CAP\)](#) greening measures (see trends below). Most dry bean production in Eastern Europe is aimed at cheap fava beans for animal feed, but smaller volumes of kidney beans could mean less need for import.

## The traders: Netherlands and Belgium

There is not a typical trade hub for common beans in Europe, as most dry beans are imported directly. But to reach niche markets, you should focus on the countries that are known for their re-exporting capacity.

The Netherlands and Belgium are traditionally important re-exporters, often to large neighbouring markets, such as Germany and France. But kidney beans are not in high demand in Germany and they also tend to be shipped directly to their end markets. Still, in some cases, these trade hubs can be interesting for you as an exporter, for example, for more exotic bean varieties with smaller demand.

Belgium and the Netherlands are in the top ten of dry common bean importers in Europe. In 2018, the Netherlands had the largest European surplus export value, re-exporting the most kidney beans in Europe.

### Tip:

Focus on trading companies in the Netherlands and Belgium to reach potential markets and buyers that you would find difficult to supply to directly. Many of these companies can be found on international trade fairs.

## 4. What trends create opportunities or risks in the European common dry beans market?

### Bean protein and health claims further promoted

Plant protein and their associated health claims will play an important role for the future growth of beans in Europe. To benefit from the interest in the health benefits of beans, you must pay attention to the quality of your production process and consider organic certification.

Beans are coming back as a source of protein for vegans and flexitarians who eat little meat. The high protein content is among [the most important health claims](#) of beans and pulses, a quality that is increasingly included

in the presentation of new pulse products. The [United Kingdom plays a leading role](#) in vegan product launches, such as [Quorn mince](#).

Other claims related to consumer interest in healthy and natural food include high-fibre content, gluten-free, preservative-free, additive-free and organic. China is the most important supplier of organic beans, but the [increasing dependence on China and growing concerns of non-compliance with organic standards](#) make buyers look for alternatives. Supplying clean, pesticide-free or organic beans is a good way to compete with traditional suppliers.

### Tips:

Make sure your product lives up to the expectations of a healthy product. Use high-quality seeds and [Integrated Pest Management](#) (IPM) for the cultivation of common dry beans for the health food market.

Find opportunities in the ingredients market and at the [Fi Food ingredients trade fair](#) when you are able to supply high-quality bean protein or other sub-products.

## New forms of convenience make common beans attractive

Canned beans have taken over a large part of the dried beans' consumption. But there is also the need to make beans more attractive in easy-to-use products. Connecting to the bean processing industry can be a good next step for experienced exporters.

European consumers increasingly value good food, but convenience plays a large role in purchase decisions too. Dry beans are considered traditional and time-consuming to prepare. The canning industry has made bean preparation easier and nowadays canned beans have taken over a large part of the bean consumption, even in traditional bean consuming countries in the Mediterranean area.

Although canned beans are well established, it does not always fit with consumer perception of fresh and attractive food. Bean brands now face the challenge of making convenient attractive again. The food industry addresses the issue by using pre-cooked beans in fresh ready-made meals, salads and product mixes, and introducing new forms of packaging or preparation methods. Microwaveable and environmental packaging were important features in new [bean-based product launches in previous years \(2010-2014\)](#).

Northern European countries have most interest in new convenience concepts. For example, Dutch company Hak introduced a successful range of [beans and bean mixes in standing pouches](#). Other companies are expected to follow and even exporters in developing countries have developed similar ideas. For example, Kyaru International, a bean exporter from Tanzania, markets pre-cooked, [farm fresh beans in standing pouches](#).

However, for small, non-European companies it will be a challenge to sell convenience beans in Europe due to the well-established processors and brands that are already present. Your best chance is to build relations with these brands and bean processing companies, or with the European traders that supply them.

### Tips:

Read more about processed food in the [CBI study on canned fruit and vegetables](#).

Keep up to date on new food trends in Europe by visiting news sites, such as [FoodNavigator](#), [Organic & Wellness News](#) and [Food Manufacture](#).

## Ethnic and traditional food on the rise

The integration of food cultures creates a diverse demand for beans. The wider adoption of traditional bean dishes can be an opportunity for exporters, but it also means you must match your bean variety to specific target groups and end users.

Ethnic populations as well as local traditional dishes are important drivers for the consumption of common dry beans. With the increasing integration of different nationalities, European consumers are growing more exposed to transnational dishes with beans. Examples are:

- Feijoada, a black bean dish from Brazil;
- Rajma, a spicy stew from India;
- Caparrones, a bean stew with chorizo from Spain;
- Mexican chili con carne;
- Italian minestrone soup with Berlotti beans.

The introduction of traditional cuisines can help boost the consumption of specific kidney bean varieties in your assortment. Characteristics such as taste, colour, size and single variety (not mixed) can be important for specific traditional niches. But traditional, high-quality bean varieties can always fetch a premium price as [more sophisticated consumers are willing to pay for a quality product](#).

In the commercial interpretation of ethnic food and recipes for the masses, specific beans are sometimes replaced with beans that are cheaper and more widely available in a specific region. For example, caparrones or berlotti beans can be replaced with light red kidney beans.

## Agricultural reforms stimulate pulse production in Europe

The European Union has given priority to the production of protein crops that contribute to sustainable agriculture. This development increases the local bean production, which can be both a risk and an opportunity for exporters, as it could reduce bean imports, but also re-evaluates the importance of pulses in Europe.

The new [Common Agricultural Policy's \(CAP\)](#) greening measures encourages the production of pulses in Europe. The reasoning behind this policy relates to:

- the role of legumes in proper soil management;
- the nutritional importance of pulses;
- the reduction of the dependence on non-European suppliers.

Many countries have supported the protein crop sector with voluntary support and direct payments from the European Union. Farmers have responded by sowing larger areas with dry pulses. In reality, it has worked out most in the fava bean production. You can also expect other local bean varieties to increase in production, but the negative effect on imports could easily be compensated by the extra attention and re-evaluation of beans as a nutritious food. These influences will last at least until the end of the policy in 2020.


### Tip:

Check our study about the [trends in the European grains and pulses market](#) for more information on which trends offer the best opportunities for dry beans.


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