

Exporting canned beans and pulses to Europe

Europe is the largest market for canned beans and pulses in the world, accounting for more than half of world imports. Large importing and consuming markets such as the United Kingdom, Germany and France offer you the best opportunities. A main driver of demand is the growing consumer interest in vegetable substitutes for meat protein, as well as additive-free and convenience products.

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1. Product description

Beans and pulses are the seeds or pods of various legume plants of the Fabaceae family. Canned beans and pulses are products made from fresh or frozen beans and pulses, processed by heat and packed in hermetically sealed cans.

The most consumed types of canned [beans and pulses](#) in Europe are kidney beans, green beans, peas, chickpeas and lentils. Especially popular convenience products are canned kidney beans as an alternative to dry kidney beans, which take considerable time to cook.

The processing of canned beans varies depending on the type of product, but typically involves the following phases:

1. Post-harvesting operations include cleaning, shelling or removing the seeds from pods, trimming in the case of green beans, washing and sizing. These operations are usually performed using purpose-built machines which often use air and water flow to clean the beans.
2. Soaking and blanching soften the beans, remove gases contained in the beans, and reduce and improve taste.
3. Canning and measuring — The most used type of packaging is aluminium cans, but other types of packaging such as jars, cartons and poaches are also used. Heat resistant cartons, such as [Tetra Recart](#), are gaining popularity because they are lighter and save shelf space due to their rectangular shape.
4. Brine addition into the cans is the following processing step. Depending on the recipe used, there is often an equal volume of brine and beans in a can, although there are no strict rules about this ratio. The brine is usually composed of water and salt, sometimes with additives. Other ingredients are also frequently added, such as sugar, spices, meat and different sauces.
5. Seaming is the process of sealing a cylindrical container and lid.
6. Sterilisation and cooking at very high temperatures ensure that the beans and pulses are cooked and preserved.
7. Cooling, storing and labelling. After thermal treatment, packages are cooled down with water. Once cooled, the cans are stacked and placed on pallets, then stored in warehouses. Labelling complies with European legislation and buyer requests.

Picture 1: Canned beans and pulses



Source: Wikipedia

This study covers general information about the market for canned beans and pulses in Europe. Please see table 1 for the specific products and their product codes.

Table 1: Products in the product group of canned beans and pulses

Combined Nomenclature Number	Product
20055900	Unshelled beans 'vigna spp., phaseolus spp.', prepared or preserved otherwise than by vinegar or acetic acid (excluding frozen)

20055100	Shelled beans 'vigna spp., phaseolus spp.', prepared or preserved otherwise than by vinegar or acetic acid (excl. frozen)
20054000	Peas 'pisum sativum', prepared or preserved otherwise than by vinegar or acetic acid (excl. frozen)

Please note that there are no specific statistical codes for canned lentils and chickpeas. Therefore, canned lentils and chickpeas are excluded from statistical analysis, but they are included in the qualitative analyses. Canned sprouting beans such as canned mung beans are not part of this study.

Quality

The quality of canned beans and pulses is evaluated through several characteristics. Some of the most important are:

- Colour, look, flavour and taste: These are among the most important quality criteria for canned beans and pulses. Quality can be judged according to the number of defects present in the beans, such as loose skin, variations in colour, the number of broken beans, as well as the presence of beans (in green beans), pods (in other beans) and blemishes.
- Size: Canned beans and pulses should be uniform in size. Sizing is optional but frequently performed.
- Cut: For green beans, there are different types of cut such as short, sliced lengthwise or diagonal.
- Brine: Composition and taste of the brine or filling sauce is also evaluated.
- Weight: Minimum drained weight is defined for green peas and green beans. For other types of canned beans and pulses, the minimum drained weight is not defined.

Labelling

The following labelling is used in the trade of canned beans and pulses:

- The name of the product, including style, such as type of cut, if present;
- The name and address of the manufacturer, packer, distributor or importer;
- Lot identification;
- Full list of ingredients declared, presented in descending order of weight, including packing medium and additives;
- Defined minimum drained weight;
- Shelf life and storage instructions;
- Bulk packaging specifications commonly include the crop year and variety.

Lot identification and the name and address of the manufacturer, packer, distributor or importer may be replaced by an identification mark.

In the case of retail packaging, product labelling must comply with the [European Union Regulation on the provision of food information to consumers](#). This regulation defines nutrition labelling, origin labelling, allergen labelling and legibility (minimum font size for mandatory information). Retail packs must be labelled in a language easily understood by the consumer in the target country, so generally in the official languages. This explains why European products often carry multiple languages on the label.

Packaging

There is no general rule for the export size of packaging cans. In European retail trade, the most common sizes are cans of 400 g. However, smaller sizes of 160–200 g are also increasingly used, as well as larger cans such as 3 kg for the food service sector.

Easy to open lids which do not require a can opener are the most frequently requested.

Tips:

Refer to the [Codex Alimentarius Standard for Certain Canned Vegetables](#) for specific quality requirements for canned peas and green beans.

See our study about [buyer requirements for processed fruit and vegetables](#) for more information about labelling and food contact materials.

2. Which European markets offer opportunities for exporters of canned beans and pulses?

The United Kingdom, Germany and France offer you the best opportunities, because of their large size. Growing markets such as the Netherlands, Romania and Denmark also offer opportunities.

Imports

Imports from developing countries growing at a higher rate than intra-European trade

- The European market for canned beans and pulses is expected to grow at 2-4% per year until 2023. This increase is driven by European consumers' increasing interest in vegetable sources of proteins that can substitute meat. It is expected that canned chickpeas and lentils will have the highest growth in total volume, partly due to the growing interest in ethnic foods.
- Between 2013 and 2017, total European imports of canned beans and pulses grew at an average annual rate of 3% in both value and volume, reaching 644 thousand tonnes at €592 million.
- Most imports consist of trade among European countries. Although imports from developing countries only account for 16% all imports, they are growing at a higher rate than trade between European countries.

United Kingdom, Germany and France the largest importers

- The European market for canned beans and pulses is moderately concentrated and there is no single country that dominates the import market. In terms of value, France, Germany and the United Kingdom have almost equal shares. However in terms of quantity, the United Kingdom is the largest European importer with a 23% share of the total European market.
- Within Europe, the countries with the highest annual import growth in quantity of canned beans and pulses in the last five years were: the Netherlands (19%), Romania (18%) and Denmark (11%).
- Among all canned beans and pulses, canned kidney beans had the highest average annual import growth (5%) over the last 5 years. The import of canned kidney beans increased by 54 thousand tonnes, from 257 thousand tonnes in 2013 to 311 thousand tonnes in 2017.
- The largest European importer of canned beans and pulses from developing countries is France, with Kenya as its main developing country supplier. Kenya is especially strong in the production and export of canned green beans.

Tips:

Identify your product's biggest importers in the large and fast growing markets.

Consider exporting to countries whose imports are growing, such as the Netherlands, Romania and Denmark, besides aiming to export to the largest European importers.

Exports

Italy the leading exporter of canned beans and pulses

- European export of canned beans and pulses is very concentrated, as Italy alone accounts for more than 50% of total exports. Italy has a highly developed canning industry for tomato processing, but the same factories often also process beans and pulses.
- The main export destinations for Italian canned beans and pulses within Europe are the United Kingdom and Germany.
- The second largest exporter, the Netherlands, is also an important re-exporter and can be a hub for your canned products. Hungary is the largest producer and processor of canned kidney beans.
- Including intra-European trade, European exports of canned beans and pulses are relatively stable in value, growing at an average annual rate of 2% between 2013 and 2017 to reach €646 million. In volume, exports grew by 1%, reaching 773 thousand tonnes in the same period.
- Around 78% of all European exports of canned beans and pulses are intra-European exports.
- The export of canned kidney beans accounts for more than 50% of European exports of canned beans and pulses.

Australia is the main non-European export destination for European suppliers

- The main external export destination for European canned beans and pulses in 2017 was Australia, followed by Russia, South Africa and the United Arab Emirates.
- Among the largest European exporters in the last five years, the highest annual export growth in volume was from Spain (13%), mainly local canned kidney beans and smaller quantities of re-exported kidney beans originally from Mexico, and the Netherlands (12%), mainly re-exporting canned kidney beans.
- Among Europe's largest export destinations, the highest increases in exports from the European Union in the last five years were to South Africa (32% average annual growth), the United Arab Emirates (8%) and Switzerland (26%).

Tips:

In addition to targeting the leading European importing countries, you can learn from European exporters and their target markets within Europe, such as the United Kingdom. You can also find opportunities in growing markets for canned beans and pulses, such as South Africa and Middle Eastern countries.

Production

Canned kidney beans lead production

- Production of canned beans and pulses in Europe decreased at an average annual rate of 4% between 2013 and 2017, reaching €1.3 billion or 1.4 million tonnes.
- Among canned beans and pulses, canned kidney beans is the product with the largest share of European production.
- Italy is the largest European canned beans and pulses producer, accounting for more than 46% of total European production in volume. France follows with a 34% share and Hungary with 10%.
- French company [Bonduelle](#) helps explain France's high production. However, Bonduelle has its own canning facilities in other European countries too, such as in Hungary, Poland, Portugal and Spain.
- Raw materials for the European production of canned beans and pulses come from different sources. The raw materials for canned green peas and green beans are mainly sourced within Europe. However, kidney

beans, chickpeas, lentils and dry beans are often imported and then processed by European canning companies.

Note that the figures above display the production of manufactured goods, which include intermediate goods as well as final goods. This implies that there may be an overlap in production data and import data, since raw materials may be imported and further processed.

Tips:

Check the website of [PROFEL](#), the European Association of Fruit and Vegetable Processors, for information about ongoing issues in the European processed fruit and vegetables market. The website provides links to the websites of the national member associations.

Read news on the website of [Bonduelle](#) to stay informed about the latest developments and good practices of the leading European canned beans and pulses producer.

Consumption

- Apparent consumption of canned beans and pulses decreased at an average annual rate of 3% between 2013 and 2017 in value, reaching €1.2 billion. However, consumption has been growing again since 2016.
- The decrease in consumption until 2016 was related to the European perception of canned food as less natural and nutritious than fresh products. However, the United Nations declared 2016 the [International Year of Pulses](#) to make people more aware of the nutritional value of pulses. It seems that promotional activities may have led to increased consumption of beans and pulses.
- The new presentation of canned products in cartons might have helped improve the image of beans and pulses, also helping to revert the downward trend. This is a disruptive technological development, equally important as the previous shift from tin cans to glass jars.
- Companies are also keen to promote products of local heritage, such as [bruine bonen](#), [kapucijners](#) and [veldertjes](#) by the leading Dutch brand HAK in the Netherlands. This tendency is part of the larger local food trend among consumers.
- Canned kidney beans and chickpeas are more consumed in Europe than in their dried forms, which take more time to cook. Still, some consumers prefer to use dried kidney beans for cooking, especially in Eastern European countries, where dried beans are used in popular national dishes.
- Green peas are more popular in frozen form, since they are cooked quickly, plus they are a very seasonal product that is only available fresh for short periods in the summer. Lentils are frequently used in dried form, as they require much shorter cooking time than dried kidney beans or chickpeas, although there is a growing range of pre-cooked and ready-to-eat lentils on the market.

The figure above displays the apparent consumption of canned beans and pulses, calculated as the difference between external European production, imports and exports to non-EU destinations. Production statistics largely depend on the reliability of the data reported by European processing companies, while trade statistics are incomplete as explained in the introductory chapter. Therefore, consumption statistics should be used as a loose indicator.

3. What trends offer opportunities in the European market for canned beans and pulses?

Consumer demand for meat protein substitutes and convenience are the leading driving forces behind the growing consumer interest in canned beans and pulses in Europe. To find out more about general trends, read our study about [trends for processed fruit and vegetables](#).

Specific trends for canned beans and pulses include:

- Consumers are becoming more aware of packaging used in cans. The number of BPA-free claims, relating to bisphenol-A, on sold cans is increasing.
- Organic beans and pulses are increasingly in demand. Processors of organic beans are also reducing [the use of salt and sugar](#) in their products, producing cans containing only beans and water.
- Demand for smaller cans of beans is growing, as consumers search for convenience products that can serve as a single portion. The typical cans of 400 g are often too large for small servings.
- A growing interest in ethnical cuisines such as Mediterranean, Indian and Japanese, is driving the demand for less consumed beans and pulses such as chickpeas, lentils, lupin beans, fava beans and adzuki beans. Products like hummus or falafel are now widely accepted as meat protein replacements by European consumers.
- The consumption of beans is promoted by several international and European initiatives. Followed by the International Year of Pulses, 10 February has been declared [World Pulses Day](#).
- Beans and pulses are increasingly used as ingredients for final products. According to the European [TRUE Project](#), products containing beans and pulses have registered an increase of 39% in Europe since 2013. The product sub-categories with the highest increase were meat substitutes, with a growth rate of 451%, pasta (295%) and bean-based snacks (128%).
- Investments in innovations related to cans are also growing. Recent examples are new easy opening solutions, such as [Peelable Ends](#) and [Easylift](#), transparent plastic cans ([Klear Can](#)) and low environmental impact solutions, such as [EDV Packaging](#).

Tips:

Promote the consumption of canned beans and pulses together with your industry partners. Good examples include [The Global Pulse Confederation](#), [TRUE Project](#), [FoodProFuture Project](#), [Pulses UK](#), [The Canned Food Alliance](#) and the [Lentils.org](#) initiative by the Saskatchewan Pulse Growers.

Read more about developments in can packaging on the website of the [International Packaging Association](#) and attend specialised events for packaging, such as [MeetingPack](#).

Consider investing into new packaging equipment together with your European buyers.

Consider using packaging such as bags or cartons, which are increasingly used in Europe.

Consider exporting canned beans that are not widely produced in Europe, such as cowpeas and pinto beans, or processed bean products such as hummus.

4. What are the requirements for beans and pulses to be allowed on the European market?

Legal Requirements

All foods sold in the European Union must be safe, including canned beans and pulses. This applies to imported products as well. Additives must be approved. Harmful contaminants, such as pesticide residues, and excessive levels of mycotoxins or preservatives are banned. It should also be readily obvious from the labelling whether a food contains allergens. Cans and other materials used for packaging must be corrosion resistant and free from contaminants, such as cadmium.

Food safety

Due to the optimisation of processing lines and sterilisation used in canned beans, microbiological contamination is not a frequent issue in the European market. However, physical and chemical contamination

still are.

Calcium disodium EDTA (E385), which is used as an additive in canned beans and pulses, is an authorised food additive in the European Union to a maximum level of 250 mg/kg. Its [re-evaluation as a food additive](#), foreseen in Regulation (EC) No 257/2010, is currently ongoing.

The most frequent pesticide used in the production of beans is glyphosate. The maximum residue level of glyphosate in beans is set at 0.1 mg/kg.

The potential harm of BPA has been debated in several European Union member countries, such as Sweden, Denmark and France. On 1 January 2010, France banned the use of BPA in products that come into direct contact with food for babies and young children, such as feeding bottles. The European Union ban followed in January 2011. From 1 January 2015, France has introduced a new law, banning the use of BPA in all food packaging.

Labelling requirements

The [European Union Regulation on food labelling](#) forbids misleading consumers. Claims that a food can prevent, treat or cure human diseases cannot be made. Allergens must be highlighted in the list of ingredients. Requirements regarding information on allergens now also cover food sold in bulk, including those sold in restaurants and cafés.

Canned lupin beans are also considered an allergen, which must be indicated on the packaging. Allergens also include sulphites, which are used in the production of canned beans. Sulphites need to be indicated as a potential allergen if levels exceed 10mg/kg or 10mg/l.

Canned beans and pulses are often produced together with sauces and spices. Some spices such as celery or cumin are also potential allergens and must be indicated on the packaging.

Nutritional information is also mandatory for canned beans and pulses.

Tips:

Refer to our study about [buyer requirements for processed fruit and vegetables](#) for a general overview of the buyer requirements in the European Union.

Consult the EU Trade Helpdesk to find [European Union legislation](#) for your selected products under the corresponding codes for canned beans and pulses.

Check the International Trade Centre's [Sustainability Map](#) for information on commonly requested standards. It is an online tool that provides comprehensive information on more than 250 voluntary sustainability standards and other similar initiatives.

Refer to the [Codex Alimentarius](#) for practical guidelines that can help you meet the requirements of European food safety legislation.

Refer to the [sustainability practices of Bonduelle](#) for examples of independent certification programmes aimed at environmental protection and corporate social responsibility.

5. What is the competition like in the European market for canned

beans and pulses?

There are two main sources of competition: product substitute competition and competition among producers of canned beans and pulses.

Product competition for canned beans and pulses in the European market includes dried and fresh beans and pulses. In addition, new types of packaging such as cartons and pouches are creating new competition for companies that only produce canned products.

- Most imports of canned beans and pulses originate from within Europe, Italy being the leading supplier. Italy is not only Europe's main supplier, but also the worldwide leading supplier of canned kidney beans and canned green beans.
- The leading developing country supplier of canned beans and pulses to Europe is Kenya, followed by China. Kenya is the leading developing country supplier of green beans, while China is the developing country leader in the supply of canned peas and kidney beans. Important developing countries suppliers of canned chickpeas are India and Lebanon. Other important developing countries suppliers of canned beans and pulses to Europe include Madagascar, Cameroon and Turkey.
- Developing country suppliers with the most notable growth in canned beans and pulses supplies to Europe in the last five years were Madagascar (16% yearly growth in canned green beans), Lebanon (32% in canned kidney beans and chickpeas) and Mexico (20% in canned kidney beans).

Major company competition comes from the primary producing countries within Europe, as well as supplying companies outside Europe.

Examples of European canned beans and pulses competitors include:

- Italy: [La Doria Group](#), [Conserve Italia](#), [Riberebro](#), [Napolina](#), [Pancrazio](#), [Meditalfood](#);
- France: [Bonduelle](#), [Groupe d'aucy](#), [Cassegrain](#), [Raynal et Roquelaure](#);
- Hungary: [Észak Üvért](#), [Szatmári Konzervgyár](#), [Foltin Globe](#), [EKO Konzervipari](#);
- Poland: [Gaston Group](#), [Maspex](#), [Dawtona](#), [Rolnik](#), [Pudliszki](#);
- Spain: [General Mills España](#) (Gigante Verde), [Cellorio](#) (also with manufacturing sites in China);
- The Netherlands: [HAK](#), [la BIO IDEA](#);
- The United Kingdom: [Heinz UK](#).

Examples of canned beans and pulses exporters to Europe include:

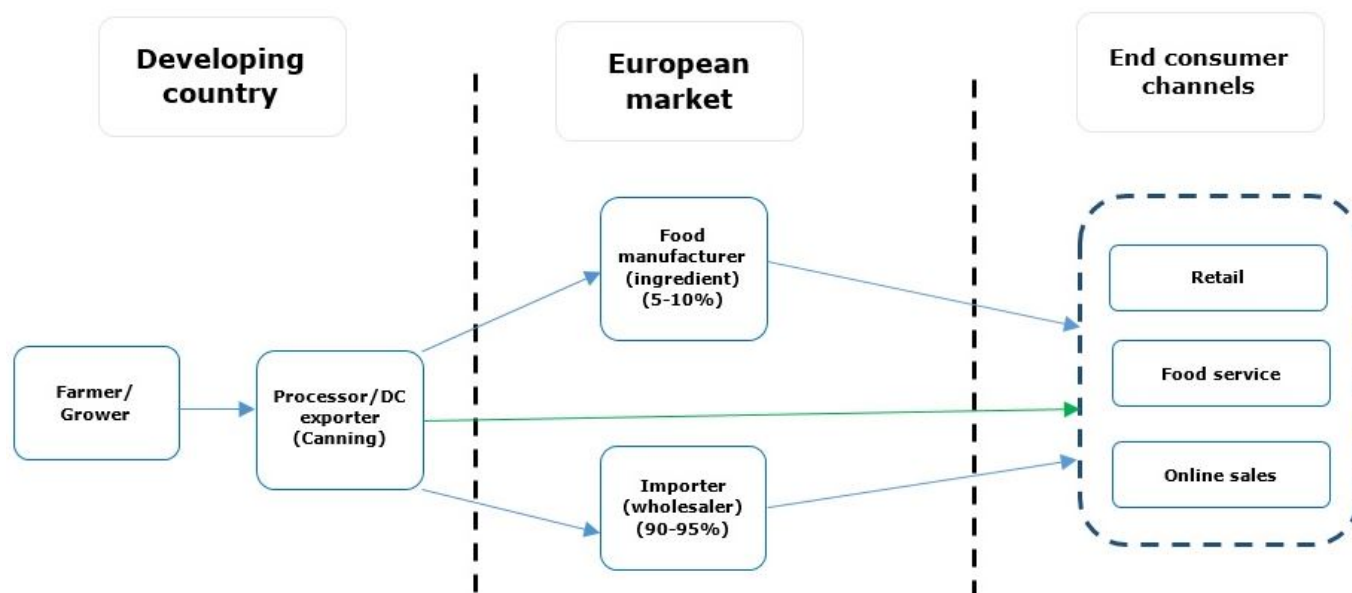
- Kenya: [Njoro Canning](#), [Trufoods](#), [Peptang](#);
- China: [Acroyali](#), [Polofood](#);
- Madagascar: [Codal](#), [Node Negoce](#) (headquartered in France);
- Lebanon: [Al Wadi Al Akhdar](#), [Sonaco](#), [Alfa Interfood](#);
- Turkey: [Korhan Pazarlama Dış Ticaret](#), [Tamtad](#).

Tip:

Be prepared to face strong competition in the European market for canned beans and pulses. However, you can learn from developing country exporters that have found ways to enter the European market, such as those from Kenya, Madagascar, Lebanon and Mexico. Find more information on bean production and processing by developing country suppliers on the websites of the [Pan African Bean Research Alliance](#), [Syndicate of Agrifood Traders in Lebanon](#) and [Uludağ Fruit and Vegetable Products Exporters' Association](#).

6. Through what channels can you get canned beans and pulses on the European market?

Compared to other fruit and vegetables processing industry segments in Europe, canned beans and pulses are less used as ingredients in the food processing industry. Large quantities are sold directly in the retail segment under importers' or private label brands, or in the food service segment.



A specialised importer is the preferred channel for market entry in this sector. As canned beans and pulses are usually traded in the retail can format of 400 g, you should contact wholesalers which can supply to retail segments directly. Private label suppliers and ethnic shop suppliers are the most common channels for developing country suppliers of canned beans and pulses.

In some cases, you can supply to the retail segment directly, without an importer as intermediary. However this does not happen often, as the retail segment is usually supplied via tender procedures. Some ethnic shops, such as Asian and Mediterranean stores, also import canned beans and pulses, but not very frequently.

The food service segment has a significant share of the European market for canned beans and pulses. This segment requires bigger packaging up to five litres, and non-branded products of standard quality. An important player in the food service segment is the public sector, which is supplied via public procurement procedures. Reaching the food service segment directly is difficult due to procedural requirements, so you should search for specialised food service suppliers.

Examples of importers of canned beans and pulses in the leading European importing countries include:

- United Kingdom: [Natco Foods](#), [Gama](#), [Goodies Foods](#), [Indo European Foods](#), [S.O.P International](#);
- Germany: [Clama](#), [Kreyenhop & Kluge](#), [Henry Lamotte](#);
- France: [Opa Distribution](#), [Samgab](#), and [Agidra](#).

7. What are the end-market prices for canned beans and pulses in the European market?

Calculating margins according to final retail prices for canned beans and pulses is not indicative, as the sector contains many different products. Prices also differ between producing countries and depend on the type, size of packaging, variety and quality of the products. Based on final prices alone, developing country exporters only have a very rough general overview of the price development.

The cost, insurance and freight (CIF) price of raw almond kernels represents approximately 25% to 50% of the retail price of a retail pack of canned beans and pulses. In cases when a final retail product is sold directly to retail chains, this share is higher. Unlike other products in the processed fruit and vegetables sector, many canned products reach the retail segment more quickly because they are often packed into retail packaging.

The best way to monitor prices is to compare your offer with the offer from your largest competitors.

Private label prices are typically lower than those of producing companies' brands. In 2018, the average price of retail price for a 400 grams unit of canned beans was in the following ranges:

- Canned kidney beans: €1.5–€5/kg
- Canned green beans: €2–€5/kg
- Canned peas: €2–€5/kg
- Canned lentils: €1.2–€3/kg
- Canned chickpeas: €1.5–€3/kg

Table 2 below shows an approximate breakdown of the prices:

Table 2: canned beans and pulses price breakdown (for average package of 400 g)

Steps in export process	Type of price	Average share of the retail price
Processing and canning	Producer price	30–40%
Handling and export packing	FOB or FCA price	42–45%
Shipment	CIF price	47–48%
Import, handling	Wholesale price	50–60%
Retail packing, handling and selling (value added tax included)	Retail price	100%


Source: Market researcher compilation based on industry sources


Tip:


Add value to your produce through differentiated quality, food safety, and certification (such as [organic](#) or [Fairtrade](#)) to fetch higher prices.

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