

# Entering the European market for kidney beans and other common dry beans

The canning industry is a dominant channel for common dry beans in Europe. Importers and food manufacturers are the main buyers of dry beans. Most of their supply comes from large, well-organised suppliers in Canada, Argentina and the United States that trade beans as a bulk commodity. To compete with the current suppliers, you will either have to scale up your production capacity and work efficiently, or specialise in a specific high-quality variety or organic beans.

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## 1. What requirements must common dry beans comply with to be allowed on the European market?

Common dry beans must comply with the general requirements, which you can find in the [buyer requirements for grains, pulses and oilseeds](#) on the CBI market information platform. You can also use the [Trade Helpdesk](#), which provides an overview of market access requirements for oilseeds per country using HS code 071333300 for kidney beans and white pea beans (*Phaseolus vulgaris*).

### What are mandatory requirements?

#### Food safety: Traceability, hygiene and control

To export dried beans to Europe, you have to comply with strict rules and obligations on food safety. The [General Food Law](#), which regulates food safety in the European Union, also applies to dried beans. Food safety and traceability should be your top priority. Non-compliance can lead to temporary import stops or to stricter control from your origin country. As a supplier, you must make sure to work according to the [guidelines of Hazard Analysis and Critical Control Points \(HACCP\)](#).

You must also devote attention to the levels of pesticides, contaminants and microbiological criteria. Be aware that the maximum residue limits (MRLs) requirements for organic dried beans and for beans used in baby food are much more stringent. There are MRLs for pesticides that might be used on dry beans. Commonly used herbicides such as glyphosate are being phased out. [Contaminants](#) such as Aflatoxins and Lead and [micro-organisms](#) such as Salmonella, E. coli and Listeria monocytogenes must be absent or within the limits according to European legislation. For example, for pulse crops, the maximum level for lead contamination is 0.20 mg/kg in wet weight (see table 1).

Table 1: Simplified table of EU limits for micro-organisms and contaminants

Food category	Micro-organisms / contaminant	Sampling plan		Limits	Stage where the criterion applies
		n	c		

Legume vegetables, cereals and pulses	Lead	-	-	0,20 mg/kg wet weight	-
Ready-to-eat foods intended for infants and ready-to-eat foods for special medical purposes	Listeria monocytogenes	10	0	Absence in 25 g	Products placed on the market during their shelf life
Ready-to-eat foods able to support the growth of L. monocytogenes, other than those intended for infants and for special medical purposes		5	0	100 cfu/g	Products placed on the market during their shelf life
		5	0	Absence in 25 g	Before the food has left the immediate control of the food business operator who has produced it
Ready-to-eat foods unable to support the growth of L. monocytogenes, other than those intended for infants and for special medical purposes		5	0	100 cfu/g	Products placed on the market during their shelf life
Sprouted seeds (ready-to-eat)	Salmonella	5	0	Absence in 25 g	Products placed on the market during their shelf life

n = number of units comprising the sample; c = number of sample units giving values over the limit.

\*most buyers of dry pulses will maintain these limits for their imports

Sources: [COMMISSION REGULATION \(EC\) No 1881/2006](#) setting maximum levels for certain contaminants in foodstuffs and [COMMISSION REGULATION \(EC\) No 2073/2005](#) on microbiological criteria for foodstuffs

### Tips:

Read more about [pesticides](#), [contaminants](#) and [micro-organisms](#) on the website of the European Commission. Find out the MRLs for pesticides and active substances that are relevant for common dry beans by [consulting the EU MRL database](#); search for the term “beans” (code number 0300010) or the type of pesticide.

Reduce the pesticide levels by applying [integrated pest management](#) (IPM) in production. IPM is an agricultural pest control strategy that includes growing practices and chemical management.

## Phytosanitary control

One of the main risks for common dry beans is infestation by weevil insects, which damages the appearance of the bean and makes them unsuitable to sell as food. Beans with live insects are banned from import. Another issue is preventing the contamination of dry beans with a genetically modified (GMO) crop (often soybean or maize).

When exporting seeds of dry beans (*Phaseolus vulgaris*) for planting purposes, you must follow strict phytosanitary rules and include a phytosanitary certificate according to [Annex XI in regulation \(EU\) 2019/2072](#).

## Quality requirements

If you are planning to export dried beans to Europe, you will have to meet the right quality standards. There are no specific European standards for dried beans. Instead, it is best to follow the indications of your buyer and the [International standard for certain pulses](#) in the [Codex Alimentarius](#), which includes quality requirements for common dry beans (*Phaseolus Vulgaris*).

For European buyers, dried beans must meet the following requirements:

- Dried beans must be safe and fit for human consumption
- Free from abnormal flavour, odour and living insects
- Free from dirt in amounts that may be hazardous to human health
- Seeds with serious defects: max 1%
- Maximum discolouration 3%
- Maximum moisture level 15% (in tropical climates or long-term storage) or 19% for normal commercial practice.
- Moisture levels must be lower in certain climates or when transported or stored for longer periods
- Extraneous matter less than 1% (of which mineral matter <0.25% and dead insects <0.1%)
- Quality in accordance with EU regulation on contaminants, maximum residue limits (MRLs) and microbiological properties

## Packaging and handling

The packaging of common dry beans must be suitable to protect the product and must be conform to the [Regulation \(EC\) No 1935/2004 on materials and articles intended to come into contact with food](#). Common types of packaging for common dry beans are polypropylene bags of 25kg/50kg or bulk bags of around 1 tonne. Different buyers may have different preferences.

During transportation and storage common dry beans should be kept in a dry, dark, cool and well-ventilated environment. Almost all types of beans are vulnerable to heat, moisture and infestation by weevil. Moisture may lead to mould, spoilage and self-heating.

### **Tips:**

Do not mix dry beans from different harvest periods. Older seeds will downgrade the entire lot.

Make sure shipping containers are clean and protect the cargo from moisture, pests and cross-contamination. Avoiding cross-contamination is especially important for organic produce as well as for keeping your product free of GMO grains and gluten.

Always discuss specific quality (grade, size) and packaging requirements and preferences with your customers.

Check the [cargo handbook](#) for further information on the handling of dry beans.

## **What additional requirements do buyers often have?**

### **Certifications as a guarantee**

As food safety is a top priority in all European food sectors, you can expect most buyers to request extra guarantees from you in the form of certification. Food management systems and certifications that are recognised by the Global Food Safety Initiative ([GFSI](#)) are widely accepted throughout Europe.

For exporters that process beans (cleaning, drying and packing), a recognised food safety management system is often a requirement to become a supplier to European buyers.

If you are a supplier of dry beans, you may find one of the following certification schemes useful, depending on the role you play in the supply chain (production, distribution or processing):

- [GLOBALG.A.P.](#) (agricultural production);
- [Food Safety System Certification 22000](#) (FSSC 22000 /ISO 22000);
- [BRCGS for Food Safety](#) (British Retail Consortium);
- [IFS Food Standard](#) (International Featured Standard).

### **Tip:**

Check with your buyer to determine which certification scheme is most relevant for your target market.

## **What are the requirements for niche markets?**

### **Organic certification**

Organic certified dry beans are part of a developing niche market. Pulses are becoming more popular as a nutritious ingredient for vegan and health-conscious consumers. For the same reason, many of these consumers prefer organic products. Several specialised European buyers are focused on the growing organic market, including [Tradin Organic](#) and [Rapunzel Naturkost](#) (social and organic).

The supply of organic common dry beans does not meet the total demand. To supply organic dried beans in the European Union, you have to use organic production methods according to [European legislation](#) and apply for an organic certificate with an accredited certifier.

All organic products imported into the EU must have the appropriate electronic certificate of inspection (e-COI), which are issued by a control body that is recognised by the European Union. If you, your client or the inspection body does not [create an electronic certificate of inspection](#), your products will not be released from their port of arrival in Europe.

### Tips:

Consider organic as a plus, but not as a must. Start with trials to see if you can compete in this niche market. Remember that implementing organic production and becoming certified can be expensive. You must be prepared to comply with the whole organic process to market organic products. Read more about organic certification in the study on [buyer requirements for grains and pulses in Europe](#).

Read about organic farming and European guidelines in this field on the [European Union website on organic farming](#).

Find importers that specialise in organic products in the [International directory of organic food wholesale & supply companies](#). You can also visit special trade fairs for organic products, such as [Biofach](#) in Germany.

## Sustainability and social compliance

European buyers are paying more and more attention to their corporate social responsibilities concerning the social and environmental impact of their business. As an exporter, you are part of the supply chain and share this responsibility.

Buyers will often have you fill in a set of documents and declarations before doing business or ask you to comply with a code of conduct. Consumer brand companies are particularly interested in showing their good conduct. For example Bonduelle, one of the largest bean canning companies in Europe, explains [how the company conducts sustainable procurement](#) and monitors the performance of corporate social responsibility (CSR) in their supply chain.

Applying standards and certifications will help you fulfil the expectations of buyers. Initiatives or certification schemes that can help improve your social status, are:

- The Business Social Compliance Initiative ([amfori BSCI](#)), implementing the [amfori BSCI code of conduct](#);
- The Ethical Trading Initiative ([ETI](#));
- Sedex Members Ethical Trade Audit ([SMETA](#))
- [GlobalG.A.P.](#) and [GlobalG.A.P. Grasp](#)

A consumer label for fair trade practices, such as [Fairtrade International](#) and [Rainforest Alliance](#), is a very small niche requirement for dry beans, for which you need very specific buyers.

### Tips:

Use the [ITC Standards Map](#) to learn about the different sustainable and social standards and see which ones are available for your country.

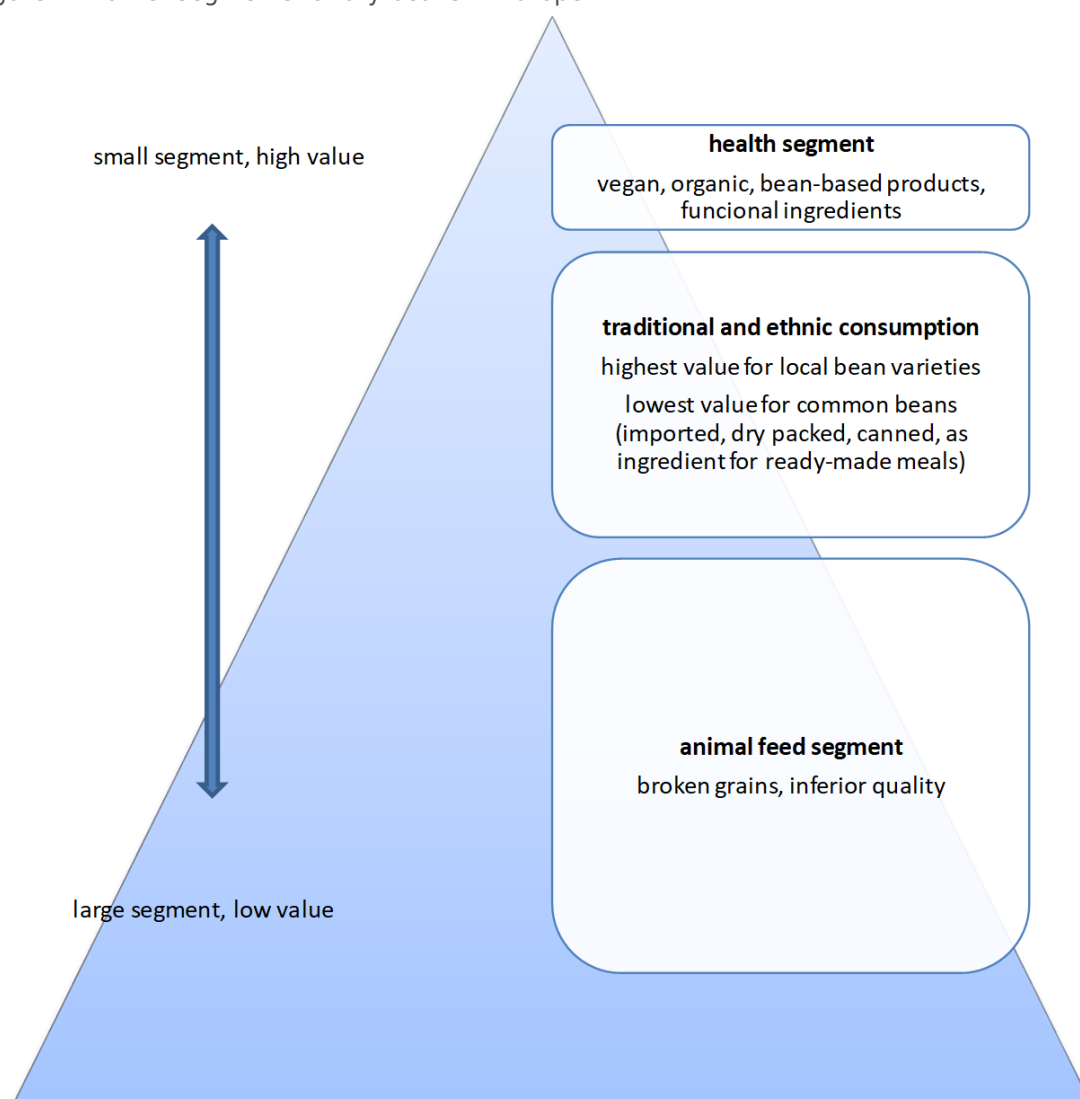
Check your company's current performance using some of the practical tools in the [amfori BSCI](#)

## 2. Through what channels can you get common dry beans on the European market?

### How is the end-market segmented?

The common dry bean market is segmented in method of consumption or use, such as health food, traditional/ethnic consumption and animal feed. Within the general food segment, you can find different local and imported bean varieties, most often pre-cooked and with a smaller share sold as dry beans or in food preparations.

Figure 1: Market segments for dry beans in Europe



### Beans as a health food

While many consumers consider common beans to be an old-fashioned food, it is increasing in popularity with health-conscious people. In the health food segment, beans are often purchased as a vegan and gluten-free protein source and with attention for natural and organic products. Although vegan and 'healthy beans' are a niche segment, it presents interesting developments and leads to innovative bean-based products. A [report by Agrosynergie and the European Commission](#) estimated that 24% of pulses are used by the food industry for

protein products or as functional ingredients.

In 2018, [Mintel estimated that 9% of the new product launches in Europe had a vegan claim](#). And in this vegan trend, pulses can no longer be ignored by mainstream food manufacturers. They are being used in pastas, bakery products, snacks and high-protein food. The [University of Hohenheim reported growth](#) between mid-2013 and mid-2017 of legumes in meat substitutes (451%), legume pasta (295%) and bean-based Snacks (128%).

Although chickpeas and lentils have become more popular ingredients over these past years than beans, beans have been used by brands such as De Rit with [savoury bean sticks that are available at the Dutch Ekoplaza](#) organic supermarket and Explore Cuisine, which sells [organic black bean spaghetti at Holland & Barrett](#).

The United Kingdom was most innovative in the vegan segment, surpassing the more saturated German market. In the [CBI study The European market potential for common dry beans in Europe](#), you can see that France, the United Kingdom, Spain and Germany have been key countries for product launches containing dry beans in the past.

## Traditional and ethnic consumption

The largest segment for food-grade beans is the traditional or ethnic consumption. On the one side, there are consumers looking for an affordable, basic food product, and on the other side, there is a consumer group that is driven by local heritage and quality of origin.

Basic dry bean products are often imported and processed. Although dry beans are often considered out of fashion, they provide a cheap source of nutrition for many consumers. In Northern Europe, the market is strongly dominated by easy-to-cook products such as canned beans and ready-made meals and soups.

Consumers who associate dry beans with local heritage or cuisine typically look for local products. Price is less important. In traditional consumption countries such as Spain, France and Italy, there are many local common bean varieties, some with a Protected Designation of Origin or Geographical Indication (PDO/PGI), such as the Flageolet in France, the Borlotti and Cannellini beans in Italy and the [protected variety Mongeta del Ganxet \(PDO\)](#) in Spain.

In Northern Europe, you can also find dominant typical varieties or bean products; such as baked beans (white beans in tomato sauce) in the United Kingdom (see table 2) and [Dutch brown beans](#), one of the most consumed beans in the Netherlands.

Table 2: Consumption of canned beans in the United Kingdom

	2013	2014	2015	2015/2016	2016/2017
Baked beans in sauce	87	80	83	82	72
Other canned beans and pulses	17	17	17	17	20

Source: [Statista](#)

## Feed sector

The animal feed sector is an important segment for all protein crops, including common dry beans. Just over 50% of common dry beans is used for feed purposes, which is less than broad beans and soybeans. The general

quality is inferior to food-grade beans and often a left-over from European production. In import, low-grade conventional beans has to compete with cheaper soybean and is therefore less common.

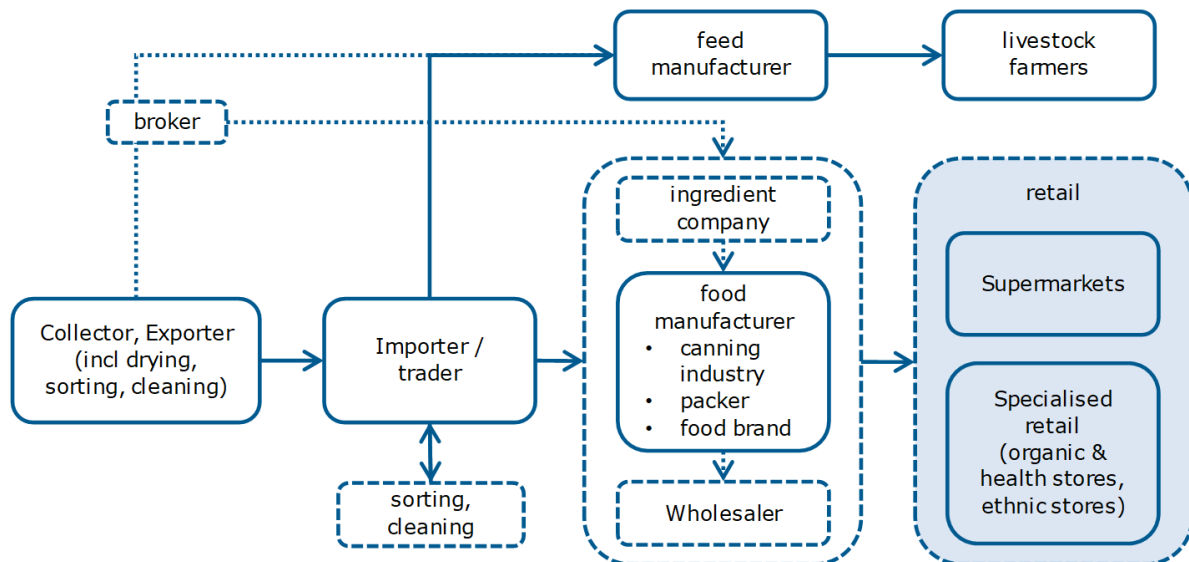
### Tip:

Adapt your product to the suitable segment: When supplying beans for canning or further processing, you must be price-competitive and focus on cheap bulk, while for dry packed beans, size and appearance become more important. In the health segment, your principle way to differentiate is by selling organic beans. All segments work with dry beans as a raw material.

## Through what channels does a product end up on the end-market?

Supply chains for common dry beans are usually short and often partly integrated with large producers and food manufacturers, but importers and specialised sourcing companies still play an important role as well, especially when beans are imported from smaller suppliers.

Figure 2: Market channels for common dry beans in Europe



### Importers or trader

Importers and traders that are specialised in pulses and dry ingredients belong to one of the main channels for common dry beans, especially when sourcing in developing countries or trading niche varieties. The main role of the importer is to ensure a quality supply of beans, which includes matching supply and demand, food safety and quality control, supply chain management and checking for compliance with sustainability standards.

There are importers of different sizes, varying from large, integrated trading companies such as [AGT Poortman, an international importer, distributor and stockist of pulses including beans](#), to small importers such as [Beanworks, which is specialised in sourcing](#) several bean varieties, grains and seeds.

The counterpart of an importing company is often a producer or a collector of beans that can secure a certain supply and basic processing facilities (drying, cleaning and sorting).

### Food manufacturer

The food manufacturing industry consists of canning companies, packers, processors and food brands.



There are several food companies that will buy common dry beans directly from local producers or exporters, especially companies that have beans as a core product, such as [Pedon](#), [La Doria Group](#) (Italy) and [Sabarot](#) (France). One of the largest processors and packers of beans in Northern Europe is [Müller's Mühle](#) (Germany). Local suppliers are often preferred, but the European supply is insufficient to fulfil the demand.

Leading brands and canning companies are often well integrated with their suppliers and have processing plants in several countries. For example, [Bonduelle](#) (France) works with 3100 farmers and manages 56 processing facilities. These types of companies also maintain strict rules of compliance. Food manufacturers and brands also need a stable (contracted) price, reliable supply and consistent quality.

The channel of processed beans also includes specialisations, including organic brands such as [La Bio Idea](#) and ethnic food companies such as [Unidex](#), which distribute foreign bean brands. Private label is also a common channel, which includes canning companies such as [Coroos](#) (Netherlands), [Acico](#) (Spain), but also food developers such as [Schouten Food](#) (Netherlands), a developer of plant-based foods such as a [vegan bean burger](#). These companies supply products according to retail specifications.

## Ingredient companies

While pulses are renewing their status as a health food, you can expect more companies to experiment with beans as an ingredient. This means that, in the future, there will also be more opportunities with ingredient companies that develop and commercialise bean protein.

As an exporter of common dry beans, it will be interesting to follow new product developments, but to sell your dry beans you will still be dependent on the main importing channels. Common dry beans are not the first choice as a special ingredient, mainly because other pulses such as peas, fava beans, lentils and chickpeas are preferred either due to their superior protein, ease of use, availability or price.

The company Ingredion has developed a pulse protein, derived from pea, lentil and fava beans under the brand name [Vitessence](#), and Roquette markets pea protein under the name [Nutralys](#). The expertise of these companies is ingredient innovation, leaving the sourcing of raw materials with the experienced importers.

### Tip:

Visit the [Food Ingredients Europe](#) trade fair to get the newest insights in the use of pulses as an ingredient. You can also see examples of leading companies by [tracking the plant-based protein movement on Fooddive](#) or find ingredient companies that work with plant protein on the [website of the European Vegetable Protein Association \(EUVEPRO\)](#).

## What is the most interesting channel for you?

The trade channels for dried beans are well developed, which means that businesses are mature and experienced. Suppliers are selected based on product quality, availability and supply stability. As an exporter, it is important to have a cleaning and bulk packing facility, or at least have access to one.

A large part of the non-European dry beans arrive in Europe through importers that are specialised in trading, such as [Beanworks](#) (Belgium) and/or managing local brands such as [Sabarot](#) (France). Importers and specialised sourcing companies can facilitate your market entry and get your product into the distribution and manufacturing channels. These are the companies you should aim for as a foreign supplier. Their role is to source the best dry beans and make sure the products meet the required standards.

If you are able to supply large volumes from your own production and work with fixed-price contracts, you can

also explore the possibility of supplying through the major manufacturing channels to large canning companies such as [Bonduelle](#) (France) and processing companies such as [Müller's Mühle](#) (Germany). You need to have excellent internal quality control and be ready for demanding clients.

### **Tips:**

Use the online shops of supermarkets to see what the leading brands are. To meet private label producers and their retail clients, you could spend some time at the [private label trade show PLMA](#) in the Netherlands.

Find potential buyers by presenting your products at the major food trade fairs such as [Anuga](#) and [SIAL](#). Both fairs also have exhibitor lists you can dive into.

## **3. What competition do you face on the European common dry bean market?**

India, Myanmar and Brazil are the largest producers of common dry beans in the world, but the main suppliers to Europe are other countries. Generally, the strongest competition comes from large farms and producer groups, many of which can be found in Canada, the United States and Argentina. Size is the key to competing in bulk supply. Price and available quality play an important role and [\[TP-MV1\]](#) can change supply sources annually.

### **Which countries are you competing with?**

While the supply from the United States and China is declining, the European import from Canada and Argentina compensates for this decline. The production in Europe is also expected to increase further in countries such as Spain, Greece, France and Bulgaria (see figure 4). Production in Ukraine is growing fast, but it is not yet among the most important suppliers of common beans.

### **Canada: preferred supplier**

Canada is the world's largest producer of lentils and dry peas, but it is also a preferred country for European buyers of dry beans. Although the country is not among the largest dry bean producers, it has a solid reputation and is able to deliver a reliable and high-quality volume of dry beans for human consumption. In 2018, the European import was 137 thousand tonnes of common dry beans.

Canada's largest bean crop is white pea bean (navy bean), so most of their export is directed to the United Kingdom. The United Kingdom is a large consumer market for baked beans (processed navy beans) and imported 71.3 thousand tonnes of dry beans (mostly navy beans) from Canada in 2018. Italy was the second largest European importer with 29.3 thousand tonnes. Canada also grows significant quantities of pinto, cranberry, black, dark red kidney, light red kidney, great northern, Dutch brown, pink and small red beans. Smaller quantities of Azuki, Kintoki and Otebo beans are grown under contract.

[According to Statistics Canada](#), pulses are grown mostly by large farms with on average more than a thousand hectares, and the concentration of fewer, bigger farms is increasing. Ontario has the largest area of dry bean production, followed by Manitoba and Alberta. Between 80-90% of the beans grown in Ontario are exported. Organisations such as the [Ontario Bean Growers invest in resources to increase yield and reduce agronomic risks](#).

## Argentina: strong connection with Spain and Italy

Argentina has, similar to Canada, big farms that are able to produce grains and pulses on a large scale. The production consists mainly of white alubia beans and black beans. Smaller production quantities of other common bean types include cranberry beans, light red kidney and dark red kidney beans.

Its main European destination markets are Spain and Italy, which mainly import white beans. Spain purchased 27.1 thousand tonnes from Argentina in 2018, which was over 60% of their total import of common dry beans. Italy imported a similar volume of 26.8 thousand tonnes from Argentina.

However, the level of organisation and private-public cooperation is less developed than in north-America. A [Harvest Trade Mission Report of the US Dry Bean Council in 2019](#) pointed out the risks and costs that Argentina faces in competing in the international markets due to economic instability, export tax and the lack of organised seed breeding.

## United States: leading producer will struggle with European tax regime

The United States is one of the leading producers of common dry beans. The total production of dry beans was estimated by Faostat at 1.6 million tonnes in 2017. According to the [United States Department of Agriculture \(USDA\)](#) the last production volume in 2019 was 1.1 million tonnes. The states with the largest shares of dry bean production are North Dakota (32%), Michigan (17%) and Nebraska (11%). The most popular beans are pinto beans, navy beans, black beans, navy beans, kidney beans and great northern beans (see figure 5).

According to the [US Dry Bean Council \(USDBC\)](#), approximately 20% of American-grown beans are shipped to international markets. In 2018, around 78 thousand tonnes were imported by the European Union. Italy and the United Kingdom are relatively large buyers of American dry beans. Italy imported 34.7 thousand tonnes of mainly dark red kidney beans and navy beans and the United Kingdom imported 12.1 thousand tonnes of, almost exclusively, navy beans.

In general, the United States is a competitive, high-level player in the dry beans sector. It has the support of the US Dry Bean Council (USDBC), which [conducts export promotion programs](#), and several research institutes that help develop new insect and disease-resistant dry bean varieties.

However, commercially, the country has lost its advantage on the European market, facing additional import duties of 25% due to recent trade disputes (still ongoing as of January 2020). Exporters from other producing countries can benefit from this trade barrier.

### Tip:

Check out your competition from the northeast United States on the [website of Northarvest Beans, selecting dealers per bean type and region](#), or on the [supplier directory of the Michigan Bean Commission](#).

## China: declining dominance on European market

China's production of common dry beans is gradually increasing and reached 1.3 million tonnes in 2017. Europe imports a small part of this production; 44 thousand tonnes of Europe's import in 2018 was of Chinese origin. Italy is China's largest buyer, with 24.5 thousand tonnes. Far behind follow importers from the Netherlands, Spain, the United Kingdom and Greece, with total volumes of 2 to 3 thousand tonnes. China is also known as one of the largest organic producers of pulses.

China has a large internal market and is logistically very close to India, a high consumption market. This is one of the reasons China is not the main competitor in dry bean export to the European market. But despite an increasing production volume in China, the export to Europe is declining.

For example, Chinese dark red kidney beans no longer control the Italian canning market as they did before. Some buyers are looking for new sources with superior quality and a more reliable supply. In the organic trade, buyers are also moving away from China, due to decreasing trust in China's compliance with organic standards.

## **Ethiopia: smallholders face difficulties in export to Europe**

Ethiopia has managed to become one of the larger suppliers of common dry beans to Europe, mostly white pea beans. The country exported 22 thousand tonnes to Europe in 2018, but these volumes have been declining for several years. Portugal, which imported 9.1 thousand tonnes of dry beans from Ethiopia in 2018, is currently their most important market in Europe. For Portugal, Ethiopia is the second-largest non-European supplier after Argentina.

Ethiopia has potential as a dry bean supplier if the value chains are further developed. The problem is that most farmers are very small and do not have access to the same modern technology or commercial cooperation as large-scale producers in developed countries. For small producers, it is more difficult to meet the quality and volume requirements of large European buyers and retailers.

Navy beans are traded through the Ethiopia Commodity Exchange, but Ethiopian farmers will remain dependent on external facilitators, investments and intermediaries to realise export growth. Intermediaries can combine product volumes, but besides an economy of scale, they also need export knowledge and must achieve the right quality standards. This way, Ethiopia could become a larger international source for common dry beans or promote the ethical trade of smallholder beans.

## **Egypt: geographical advantage**

Egypt is primarily a supplier of dry beans to northern Africa and the Middle East, but it also supplies several countries in Eastern Europe such as Romania and Bulgaria, which imported 9.4 thousand and 6.1 thousand tonnes from Egypt respectively. In total, the European Union imported 18 thousand tonnes of common dry beans (mostly white kidney) in 2018.

Egypt is a big producer of white kidney beans. These may not have the size or attractiveness of the large white alubia beans of Argentina, but their price is very convenient for processors and low price buyers. Egypt is also ideally positioned, close to Europe, and Eastern Europe in particular.

### **Tips:**

Improve your efficiency in producing, harvesting and processing dry beans. Besides quality and reliability, price is the main aspect to make a difference in bulk supply. Try to learn from growers in other countries or find help to improve your business, for example by [getting advice from senior expert volunteers from PUM in the Netherlands](#).

Check if there is a trade promotion organisation locally or in Europe that can help promote common dry beans from your country. Many countries organise trade fair pavilions with reduced rates and invest in building a reputation as a supply country.

Look for typical local beans in your country that are unique to your region, to differentiate yourself and discuss with specialist buyers in Europe if they see a market for them.

## Which companies are you competing with?

### AGT Food and ingredients: size matters

One of the biggest companies in pulses worldwide is [AGT foods](#), a Canadian company that buys lentils, peas, beans and chickpeas from farmers in Canada, the United States, Turkey, Australia, China and South Africa. They own over 40 international production facilities for cleaning, sizing, splitting, colour sorting and packaging and, according to the company, their production represents nearly 45% of the global market. AGT Foods is a market leader in lentils and chickpeas, but they also trade in common dry beans such as navy beans, pinto beans, dark and light kidney beans, black beans and white beans.

Their size and their international presence makes them one of the largest buyers as well as exporters of dry beans. They are able to offer farmers seed programmes and an online portal to market their crops.

Large companies such as AGT Foods focus on bulk products and are less equipped for (and less interested in) niche products, which leaves room for non-bulk suppliers.

### Hensall Co-op: success through cooperation

Cooperation and scale are important for farmers of dry beans, to build marketing power. This is exactly what [Hensall Co-op](#) has achieved in becoming one of the largest non-financial co-operatives in Canada with over 6,000 member-owners and more than 30 owned locations in Ontario and Manitoba. Hensall Co-op focuses on edible dry beans and other commodities, providing crop services and full service marketing to their member farmers.

### Desdelsur: integration of crops and livestock

Combining production capacity with different businesses can be a successful strategy. It is a strategy that companies such as [Desdelsur \(DDS\)](#) follow by integrating the production and processing of different crops with livestock.

Growing and exporting common dry beans, such as alubia, cranberry beans, black, dark and light kidney beans, is only a part of their business. By combining different business models, the company can better spread its risks, while creating synergy between different activities (for example by making their own feed for their livestock). The disadvantage of such integration is that a larger team and different professionals are needed to manage all these activities.

#### Tips:

Diversify your product assortment and/or scale up your production to become attractive to buyers and compete with leading suppliers. You can do this by working together with a number of farmers and organising sufficient capacity for the primary processing of beans. Up-to-date certifications and food safety management are a pre-condition (see requirements above).

First become successful on your local and regional market and use this experience to expand. Use the right timing to approach European buyers with quotations. The market conditions vary year to year, and you will find the best opportunity when buyers in Europe are having difficulties in finding sufficient volumes of dry beans. Do not think that you will always get a better price on the European market.

## Which products are you competing with?

Consumers can switch easily between different types of dry beans or simply purchase the product they are most

familiar with. For traditional dishes, the preference for a certain type of bean is more determined.

Consumer packed dry beans, such as kidney beans, are most easily substituted with pre-cooked or canned beans or other dry pulses that are more convenient for cooking, such as lentils.

To avoid becoming dependent on one dry bean variety, you can include different types in your offer or even consider processing dried beans into bean flour or convenience products. Before doing so, you need to make sure to have a market for these products. The growing interest for plant protein could give a boost to the use of processed pulses. However, for the food industry, soy and pea protein are generally more attractive as a nutritious ingredient than bean protein, because of their high protein and low price.

### Tip:

Try to match your product with a specific supply channel or target group in Europe. Check with [Globalpulses.com](https://globalpulses.com) for network events and conferences where you will have an opportunity to speak with other dry bean professionals about the trends in demand.

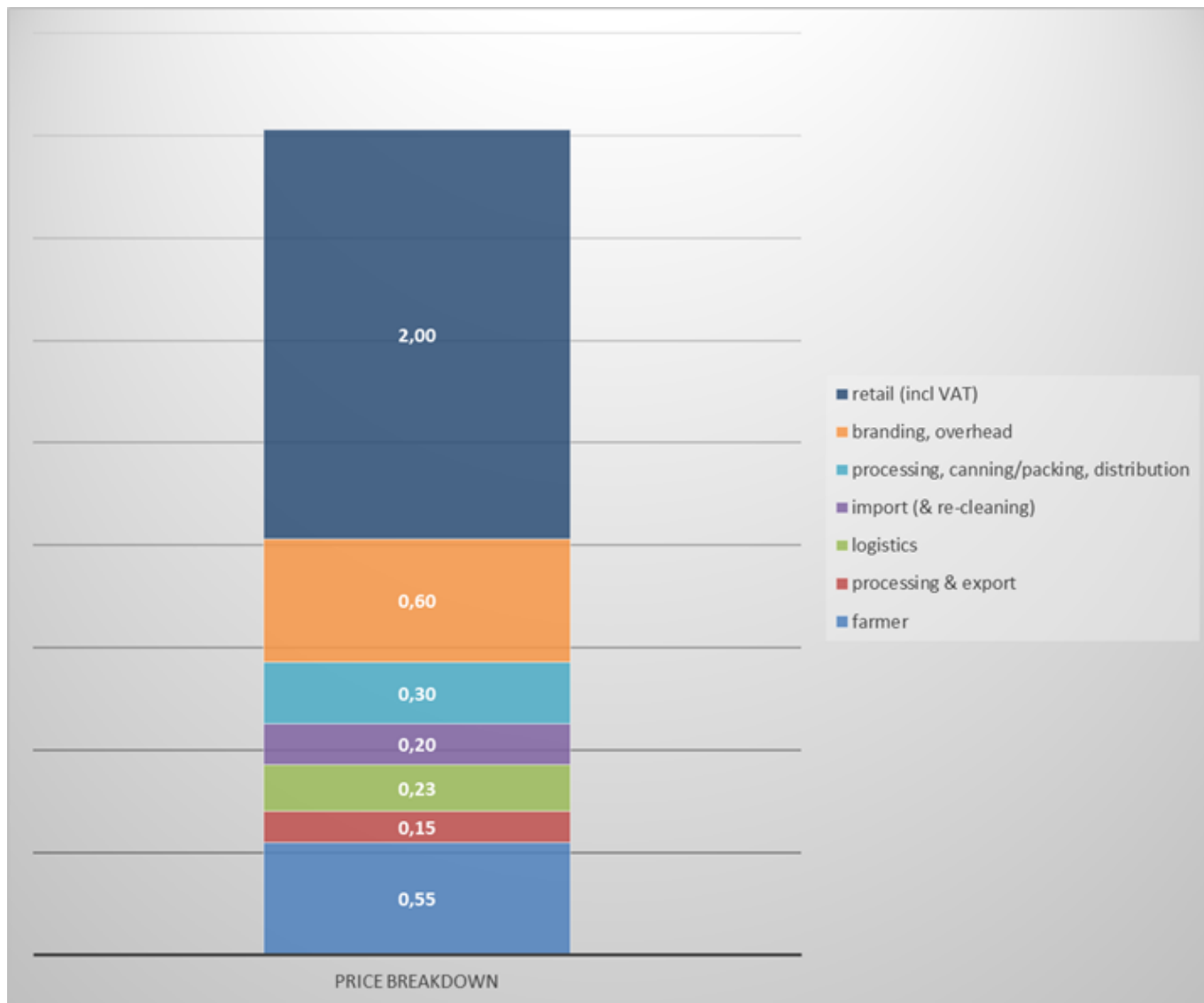
## 4. What are the prices for common dry beans on the European market?

Dry bean prices vary according to the variety, quality and availability. High-quality beans such as large white beans (alubias), dark red kidney beans or cranberry beans can be sold for between 700 to 1000 euros per tonne (FOB), while bulk pinto beans and navy beans fetch around 450 to 550 euros per tonne on the export market, depending on market conditions. Based on the price history in the United States, one of the leading producers and suppliers, the average bean prices peaked in 2012, after which it gradually returned to the lower values of 400 to 450 euros per tonne (see table 2).

Retail prices vary little between varieties, dried and canned beans. By pre-cooking beans, additional weight is added (approximately 2.5x), which compensates for the costs of processing and canning. The highest margins (and costs) are made in the branding and retail sales of the product (see indicative price breakdown in figure 6).

Retail prices for regular dried beans in Europe vary between 2.5 and 5 euros per kilo. Canned beans go for similar prices of 2 to 5 euros per kilo. The package size makes a big difference for the final consumer price per kilo. For exporters, it is important to realise that trade prices and retail prices are not directly linked and behave in their own way.

Figure 7: Indicative breakdown of the consumer price for edible common beans, packed in smaller consumer volume, value in euros per kilo



Source: based on various sources and calculations

### Tips:


Find weekly price information for different common dry beans in the United States as a guideline using the information on [market prices of the US Dry Bean Council](#) or the [Dry Edible Bean Market News Summary of the United States Department of Agriculture \(USDA\)](#).

Find information on the consumer prices in Europe for dry packed beans, canned beans and other bean products in online shops or the websites of supermarket chains, such as [Tesco](#), [Albert Heijn](#) or [Carrefour](#).

This study has been carried out on behalf of CBI by [ICI Business](#).

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