CBI Trade Statistics:
Grains and Pulses in Europe
**Introduction**

Cereals, seeds and pulses are generally major commodities that are widely cultivated and traded within the European Union (EU). The supply market for major staple foods is very locally oriented, with relatively stable levels of supply and demand. Opportunities for small and medium-sized suppliers from developing countries are best found in smaller-scale products, product differentiation (organic) and specific consumer trends (healthy, authentic, gluten-free). It is important to note, however, that smaller niche markets are accompanied by greater risk and volatility.

**Import**

**Cereals**

**EU Import of cereals in millions of tons (incl. wheat, rice and corn)**

![Graph showing EU import of cereals from 2010 to 2014]

*Source: Eurostat (Comext); figure created by ICI Business*

*Statistics for ‘EU’ refer to the EU-28 member states
*Developing countries are defined by the OECD DAC list of 2014*

**Largest EU importers of Cereals (2014) in millions of tons**

![Bar chart showing the largest EU importers of cereals in 2014]

*Source: Eurostat (Comext); figure created by ICI Business*
Large suppliers of Cereals from developing countries to the EU, in millions of tons

Source: Eurostat (Comext); figure created by ICI Business

Interpretation & opportunities

The EU market for cereals is valued at nearly €18 billion. Although cereals are sourced predominantly within the EU, the import of cereals from developing countries is increasing. This is largely affected by growth in the import of maize (from 3.4 million tons in 2010 to 10.8 million tons in 2014). The primary corn-supplying developing countries include Ukraine, Moldova, Serbia, Brazil and Argentina.

Spain, the Netherlands and Italy are the largest cereal importers from developing countries. Corn and especially wheat are typically supplied by nearby developing countries; rice is imported predominantly from India, Pakistan and South-East Asia. Belgium and Germany are also large importers of cereals, but they import primarily from other EU countries. Ukraine is the most important developing country that supplies cereals to the EU, with corn and wheat being its largest export commodities.

While the total EU import of cereals has been showing a stable increase, the import volumes from supplying countries have been fluctuating more vigorously.

Relative to the major commodities, other cereals (e.g. buckwheat and millet) continue to be regarded as highly specialized niche markets. Nevertheless, some pseudo-cereal types have shown strong growth in the past few years. Quinoa is one example (now at 15,000 tons). These commodities are paving the way for other future cereal prospects, including amaranth and teff. See also CBI trends for grains and pulses.

Tips:

- Focus on specific cereals that correspond to the growing needs and market trends of specific consumer groups (e.g. healthy or gluten-free products).
Seeds

EU Import of Seeds, in millions of tons (incl. soybeans, sunflower seeds and rapeseed)

Source: Eurostat (Comext); figure created by ICI Business

Largest EU importers of Seeds (2014), in millions of tons

Source: Eurostat (Comext); figure created by ICI Business
Interpretation & opportunities

The EU seed market is valued at more than €13 billion, with a steady rate of growth and a relatively large import volume from outside the EU. Germany is the largest overall importer of seeds in the EU, although the Netherlands and Spain import a greater share from developing countries.

The main seed imports are soybeans (Brazil, Paraguay), rapeseed (EU, Australia, and Ukraine) and sunflower seeds (Eastern EU, France). These seeds are primarily destined for the processing industry (e.g. vegetable oil).

Edible seeds on a smaller scale include linseeds (around 800,000 tons), sesame seeds (160,000 tons), hemp seeds, pumpkin seeds, chia seeds and poppy seeds.

**Tip:**
- If you are not a large exporter, look for niche markets and find partners that fit your company profile. Large commodities are related to large-scale production, while very small niche products can be more profitable. It is important to bear in mind, however, that these markets may pose higher risks and be less stable.
Pulses

EU Import of Pulses, in thousands of tons

Source: Eurostat (Comext); figure created by ICI Business

Largest EU importers of Pulses (2014), in thousands of tons

Source: Eurostat (Comext); figure created by ICI Business
Largest suppliers of Pulses from developing countries to the EU, in thousands of tons

Source: Eurostat (Comext); figure created by ICI Business

**Interpretation & opportunities**

The total import value of pulses has been increasing each year, reaching €1.2 billion in 2014. The import volume has remained relatively stable at slightly more than 1.5 million tons. In 2014, developing countries supplied around 30% of the pulses to Europe.

Italy, Spain and the UK are the largest importers of pulses from developing countries. Their imports consist mainly of kidney beans and white pea beans, which together with chick peas represent more than 70% of the total import value from developing countries.

Pulses are imported from many different regions in the world. China, Argentina and Ukraine are the largest suppliers, providing around 23% of the total supply of pulses to the EU.

Despite the scale of these large commodities, the market for pulses in Europe (especially Northern and Western EU) is underdeveloped compared to worldwide trade. There is room for growth in both common pulses (kidney beans, chick peas, lentils) and growing niches, including cow peas (over 6,000 tons) and pigeon peas (1,600 tons). See also [CBI trends for grains and pulses](#).

Large commodities are accompanied by heavy competition. For example, it would be difficult to match the competitive position of Turkey in lentils. In this case, product differentiation is important (e.g. by producing organic lentils or niche varieties).

**Tip:**
- Pulses are produced worldwide. Check with experienced EU buyers to identify which pulses and niches have higher demand or potential.
Export

Cereals

EU Export of Cereals (incl. wheat, rice and corn), in millions of tons

Source: Eurostat (Comext); figure created by ICI Business

* Statistics for 'EU' refer to the EU-28 member states
* Developing countries are defined by the OECD DAC list of 2014

Largest EU exporters of Cereals (2014), in millions of tons

Source: Eurostat (Comext); figure created by ICI Business
Interpretation & opportunities

France, Germany and Romania are the largest exporters of cereals in the EU. Their exports consist predominantly of locally produced wheat and corn. With regard to rice, another large commodity, Spain and Italy are large exporters (local production), as are the Netherlands and Belgium (trade).

Most cereals are produced within the EU and do not have well defined trade hubs. The Netherlands and Belgium are the primary points of entry for the shipping of niche products.

Tips:
- For major commodities, focus on the countries with high demand and low internal production.
- Suppliers of more exotic grains or pseudo grains should look for specialized EU markets and importers (e.g. through the following website: http://www.organic-bio.com/en/directory/cereals).

Seeds

EU Export of Seeds, in millions of tons (incl. soybeans and rapeseed)
Largest EU exporters of Seeds (2014), in millions of tons

Source: Eurostat (Comext); figure created by ICI Business
The total export value of seeds was nearly €6 billion euros in 2014. The main destination markets for seeds are Germany (rape, soy), Spain (soy, sunflower) and Italy (mainly soy).

The Netherlands and Belgium are trade hubs for more exotic seeds.

Some products pose difficult competition, including rapeseed, which is exported predominantly from France and Poland, and sunflower seeds, which are supplied largely by Romania and Bulgaria.

**Tip:**
- It is easier to supply seeds that are less likely to be produced in or near Europe, such as sesame seeds, soybeans or chia (niche).
Pulses

EU Export of Pulses, in thousands of tons

Source: Eurostat (Comext); figure created by ICI Business

Largest EU exporters of Pulses (2014), in thousands of tons

Source: Eurostat (Comext); figure created by ICI Business
Trade hubs and destination countries for Pulses

Interpretation & opportunities

The UK and France are by far the largest exporters of pulses, especially broad beans. Egypt is one of their principal buyers, in addition to being a major producer itself.

Potential competition can be expected from France, which is both a major producer and major consumer, in addition to being a net exporter to other EU countries. Poland is a significant producer, although its exports remain small. Trade hubs for pulses include the Netherlands and Belgium.

Tip:
- Pulses that are not produced and exported by the EU offer the best opportunity for exporters from developing countries. The most promising types of pulses include kidney beans and chick peas, as well as the more exotic types (e.g. cow peas, pigeon peas, black-eyed peas and lima beans).
Production

Cereals

EU productions of major cereals, in millions of tons

Source: Faostat; figure created by ICI Business

*Statistics for ‘EU’ refer to the EU-28 member states

EU productions of specific cereals, in millions of tons

Source: Faostat; figure created by ICI Business
Top 10 EU producers of cereals, in millions of tons

Source: Faostat; figure created by ICI Business

Interpretation & opportunities

Wheat and maize are staple foods that are produced extensively in Europe. The production of cereals such as wheat, maize and barley is especially high in France and Germany. Italy and Spain produce more than 2 million tons of rice.

With large-scale, stable local production of cereals, the EU is not an attractive market for small and medium exporters from developing countries to compete in staple foods. Niche cereals (e.g. black corn, quinoa and amaranth) that are not produced in or near the EU provide better opportunities for developing countries.

The growing interest in authentic and ancient grains in the EU market is likely to increase European production of such products as spelt and oats. Some European growers have already succeeded in cultivating native grains from other regions as well, including quinoa from the Andean region and teff from Ethiopia. See also CBI trends for grains and pulses for information about the increasing interest in ancient grains.

Tips:

- Stay informed about production initiatives for ‘new’ grains in Europe. Such initiatives provide a good indication of future interest and demand. New grains will take years before they can be cultivated on a large scale in Europe. Informative news websites include http://www.foodmanufacture.co.uk and http://www.foodnavigator.com.
- Use pulses as a rotational crop. They enrich the soil with nitrogen and are ideal as a rotation crop for cereals.
Seeds
EU production of major commodity seeds, in thousands of tons

Source: Faostat; figure created by ICI Business

EU production of specific seeds (excluding cottonseed), in thousands of tons

Source: Faostat; figure created by ICI Business
Top 10 EU producers of seeds, in thousands of tons

Source: Faostat; figure created by ICI Business

**Interpretation & opportunities**

Annual European production of the major seed commodities (rapeseed, sunflower, soybeans) is stable between 27 and 32 million tons.

The production of lower-volume seeds (e.g. linseed, mustard seeds and poppy seeds) is decreasing and could eventually evolve into an opportunity for external suppliers.

France and Germany are the leading producers of seeds, although rapeseed accounts for more than 85% of their production. Eastern Europe is also very productive in rapeseed and sunflower seed. Seeds that are not commonly cultivated in Europe include sesame, safflower and chia.

**Tip:**
- Production and prices of seeds can be volatile, especially for newer niche products. Try to arrange supplying contracts with your buyers.
Pulses

EU Production of major pulses, in thousands of tons

Source: Faostat; figure created by ICI Business

EU Production of specific pulses, in thousands of tons

Source: Faostat; figure created by ICI Business
Top 10 EU producers of pulses, in thousands of tons

Source: Faostat; figure created by ICI Business

**Interpretation & opportunities**

Beans and peas come in many varieties, and they are widely produced throughout the world. Dry peas and broad beans are the most common varieties in the EU. The health-food trend is likely to increase the popularity of pulses, potentially pushing internal EU production as well.

**Tip:**
- Use pulses as a rotational crop. They enrich the soil with nitrogen and are ideal as a rotation crop for cereals.
Consumption

Cereals

EU consumption of major cereals, in millions of tons

Source: Faostat and Eurostat (Market Access Database); figure created by ICI Business

*Statistics for ‘EU’ refer to the EU-28 member states

EU consumption of specific cereals, in millions of tons

Source: Faostat and Eurostat (Market Access Database); figure created by ICI Business
EU consumption of cereals, in millions of tons

Source: Faostat and Eurostat (Comext); figure created by ICI Business

Interpretation & opportunities

Western Europe consumes the largest amount of cereals (especially wheat). Quantities correspond largely to the size of the markets.

Consumption of smaller-scale cereals (e.g. oats and rye) has been increasing for the last three years.

Tip:
- Stay abreast of consumer trends through such informative websites as Organic Wellness News, Food and Drink Europe or Food Navigator.

Seeds

EU consumption of oil seeds, in thousands of tons

Source: Faostat and Eurostat (Market Access Database); figure created by ICI Business
EU consumption of oil seeds (excluding cottonseed), in thousands of tons

Source: Faostat and Eurostat (Market Access Database); figure created by ICI Business

EU consumption of oil seeds, in thousands of tons

Source: Faostat and Eurostat (Comext); figure created by ICI Business

Interpretation & opportunities

Germany is an important market for seed consumption and processing. In all, the EU consumes between 42.5 and 47.5 million tons of rapeseed, soybeans and sunflower seeds each year. Other seed volumes are below 700 thousand tons.

The consumption of edible seeds with healthful characteristics (e.g. omega3 fatty acids) is expected to increase. Healthy edible seeds for snacks or cereal mixes are highly specialized niche products, as compared to the large volumes of oil seeds intended for processing and for the food industry. Nevertheless, they could offer interesting business opportunities for exporters of innovative quality products from developing countries. See also CBI trends for grains and pulses.

Tip:
- Promote the health benefits or other interesting aspects of your products when targeting specific consumer groups.
Pulses

**EU consumption of pulses, in thousands of tons**

Source: Faostat and Eurostat (Market Access Database); figure created by ICI Business

**EU consumption of pulses, in thousands of tons**

Source: Faostat and Eurostat (Comext); figure created by ICI Business

**Interpretation & opportunities**

Dry peas (*Pisum sativum*) and dry beans (*Phaseolus vulgaris*) are the most commonly consumed pulses in Europe. France, Spain and the UK are the leading consumers of pulses.

Compared to other regions, the consumption of pulses in Europe is low, and pulses are usually sold as canned products.

Dry beans do not fit the trend of convenience and lack a modern image. Increased publicity, the promotion of health benefits and product innovation will be key drivers in helping to develop consumption in the coming years.

The Food and Agriculture Organization (FAO) has designated 2016 as the [Year of the Pulses](https://www.fao.org/3/a-i4626e.pdf). This means that pulses will be promoted worldwide, thus potentially increasing their consumption in Europe as well.
Tip:
- Differentiate your product from the standard canned beans. Try to focus on the health-food trend or add value through storytelling.
- Keep in mind that new product innovations in Europe demand top-quality ingredients, great flavours and outstanding presentation.

Useful resources

Branch-specific organizations

Coceral
European association representing trade in cereals, rice, feedstuffs, oilseeds, olive oil, oils and fats, and agro supply

Health Grain Forum
Initiative for the promotion of science and communication concerning the production and consumption of healthy cereal foods

Databases

European Grain
Platform connecting buyers and sellers of grains

Organic-Bio
Database containing buyers and suppliers of organic food ingredients and products

Europages
European business database

Kompass
International business database

Trade fairs

Eventseye
Database containing trade fairs and expositions

SIAL
Trade fair for food products

Anuga
Trade fair for food products

Biofach
Trade fair for organic food products

Certified Food
Trade fair for certified raw materials and semi-finished products

News sites

Organic & Wellness News
News site containing news about organic and sustainable trade

Food Navigator
News site containing trends and developments in the food industry

Food Manufacture
Online news service about food and beverage developments in Europe
Export requirements

ITC Standards Map
Overview of various standards and certification schemes

EU Export Help
Information about exporting to Europe

Statistics

Market Access Database
European trade statistics

ITC Trademap
Global trade statistics

FAOSTAT
Production statistics