The European market potential for canned beans

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The European canned bean market is expected to show a steady growth of 5.9% through 2024. This rise is fuelled by growing demand among European consumers for vegetable sources of protein to replace meat. Shifts in consumer preferences, such as for BPA-free packaging and healthier food options, are also driving this market. Germany, France and the Netherlands are among the European countries offering major opportunities for developing country suppliers.

Increased popularity of ethnic cuisines from for example the Mediterranean, India and Japan, along with a growing distribution network for canned food products, are boosting the canned bean market in Europe.

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1. Product description

Beans are the seeds of a flowering plant belonging to the *Fabaceae* family. Canned beans are made by blanching fresh or frozen beans. The blanched beans are put in cans with water and salt, then sealed and processed at high temperatures under steam pressure. In Europe, kidney beans and green beans are the most consumed canned beans. As a time-saving alternative to dried kidney beans, which require longer to prepare, canned kidney beans have become a popular convenience food.

The processing of canned beans varies by product, but typically involves the following steps:

1. Post-harvesting operations take place after harvesting and include cleaning and shelling of pods, trimming (for green beans), washing and sizing the crop. These activities are often carried out with the assistance of purpose-built equipment, often using air and water flows to clean beans.
2. Soaking and blanching make beans softer and eliminate gases present in beans, thus enhancing flavour. During the canning process, beans are first blanched by being quickly heated after soaking in a salt solution.
3. Canning and packaging includes filling cans with beans and sealing them. Cans made of aluminium are by far the most common form of packaging, but jars, cartons and pouches are also standard. There has been a rise in demand for heat-resistant cartons such as the ‘Tetra Recart’, which are more portable and whose rectangular shape takes up less shelf space.
4. Brine addition into cans is the next processing step. Depending on the recipe used, cans often contain equal volumes of brine and beans, though there are no strict rules about this ratio. The brine is usually composed of water and salt, sometimes with additives. Other common ingredients include sugar, spices, meat and sauces.
5. Seaming is the process of sealing a cylindrical container and lid.
6. Sterilisation and cooking at very high temperatures ensure that beans and pulses are cooked and preserved.
7. Cooling, storing and labelling is the last step. Cans are cooled down in water, stacked and packed on pallets, and then stored in warehouses. Labels have to comply with European legislation and buyer requests.

This document provides general information about the European market for canned beans for producers in developing countries. Please see Table 1 for specific products and product codes.

Table 1: Products in the canned bean product group

Combined Nomenclature Number	Product
20055900	Unshelled beans, *vigna spp., phaseolus spp.*, prepared or preserved other than in vinegar or acetic acid (excluding frozen)
20055100	Shelled beans, *vigna spp., phaseolus spp.*, prepared or preserved other than in vinegar or acetic acid (excluding frozen)

2. What makes Europe an interesting market for canned beans?

In 2019, Europe was by far the largest importing region for canned beans, accounting for over 50% of the world's total imports. On average, European canned bean imports increased 2% in volume per year between 2017 and 2021. In 2021, nearly 79% of all imports from outside Europe came from developing countries.

Looking ahead to the 2020-2026 period, the European market for canned legumes is likely to increase. With a compound annual growth rate (CAGR) of 5.9%, it is estimated to reach approximately €1.8 billion by 2024. The main reasons for this expected market growth are the appealing and unique taste of canned beans as well as the health benefits they provide. Another growth driver is a shift in consumer preference towards BPA-free packaging, which is increasing demand for canned legumes. A growing consumer preference for plant-based alternatives to animal proteins has also been driving the market in Europe.

While import volumes will continue to fluctuate, this will be due more to harvested crop volumes and price situations than changes in demand. Canned beans are low-fat, high-energy products that are suitable for people who are health-conscious and those with lifestyle-related medical disorders. Canned beans are preferred for quick bean-based meals as they are pre-soaked and require less cooking time. Added to this, numerous suppliers are launching innovative products such as beans in tomato sauce, providing more choices. As beans are considered a necessity product, price increases will not stop consumers from buying more canned beans.

Between 2017 and 2021, European imports of canned beans grew by on average 4% in value annually and 2% in volume, to a value of €442.1 million and a volume of 428 thousand tonnes in 2021. The higher growth in value than in volume indicates an increase in import prices. However, prices of canned beans are expected to go down in the long term, because production is growing faster than demand.

In 2021, internal European trade accounted for 359 thousand tonnes. Internal European trade consists of simple re-exporting of imported canned beans as well as added-value processing. European imports from developing countries increased by 1.9 thousand tonnes over the past five years, from 47.4 thousand tonnes in 2017 to 49.3 thousand tonnes in 2021.

Note: The figure above represents apparent consumption (the difference between imports and exports). There is no exact data on consumption per country.

Consumption of canned beans in the top six European countries was estimated at 213.9 thousand tonnes in 2021. Over the past five years, canned bean consumption remained stable, with a small growth rate of 0.1%. Germany, France, Sweden, Romania, Austria and Ireland are the largest markets.

Tip:

See Eurostat data for information about canned bean consumption in the top European countries. The website provides quantitative data on consumption in all European countries in various metrics, including value (euros) and volume (per 100 kg).

3. Which European countries offer the most opportunities for canned beans?

As Europe's main importer and consumer of canned beans, Germany is an interesting focus market and provides the best opportunities for canned beans. Other European countries that are large net importers and consumers are France, the Netherlands, Belgium, Sweden and Austria.

Between 2017 and 2021, European canned bean imports grew by on average 1% in volume to reach 316.3 thousand tonnes in 2021. This small growth in volume indicates stability in import quantities over the past five years.

Germany: largest European importer and consumer

Germany is Europe's largest importer of canned beans, accounting for 26% of total European imports by volume in 2021. In 2021, the total value of German imports was €114.1 million. German imports increased by 6% in volume annually between 2017 and 2021, reaching 122.7 thousand tonnes in 2021.

Germany is also the largest consumer of canned beans in Europe. German consumption of canned beans reached 116.9 thousand tonnes in 2021, up from 109.6 thousand tonnes in 2017.

In 2021, Germany imported 49% of its canned beans from Italy. However, the growth of direct imports from production countries is increasing while imports from transit countries is decreasing. This trend offers better opportunities for emerging suppliers. The second-largest supplier to Germany is the Netherlands, with a 20% share, followed by Belgium (12% share) and France (8%).

The growing preference for healthy foods has increased German consumption of canned beans. Canned beans are also increasingly used as an ingredient in instant food preparations (such as BioGourmet or Rapunzel). The photos below show some examples of canned bean products in the German market.

France: a large but shrinking market

France is one of the leading importers of canned beans in Europe, though French imports of canned beans decreased by on average 1% in value and 12% in volume annually between 2017 and 2021. In terms of volume, France accounted for 18% of all European canned bean imports in 2021. French imports of canned beans reached 75.8 thousand tonnes and €106 million in 2021.

In 2021, the leading supplier of canned beans to France was the Netherlands, with a 32% share, followed by Kenya (24%), Madagascar (10%) and Spain (10%).

Kenya was the second-largest supplier to France in 2021. Though imports from the Netherlands exceeded

Kenyan imports in that year, the value of Dutch imports has decreased significantly, from 34.1 thousand tonnes in 2017 to 24.5 thousand tonnes in 2021.

The Netherlands: trade hub

The Netherlands is an important importer of canned beans in Europe, accounting for 13% of all European imports in 2021. Between 2017 and 2021, Dutch imports of canned beans increased 52% in volume annually to reach 56.2 thousand tonnes in 2021, representing €51.7 million in value. The Netherlands plays an important role as a trade hub in Europe. France is the leading destination of Dutch re-exports of canned beans, importing more than 24.5 thousand tonnes in 2021.

The leading supplier to the Netherlands in 2021 was Italy, with a 44% share, followed by Belgium (17%), the United Kingdom (16%), Kenya (8%) and Germany (4%). Lebanon and France also export canned beans to the Netherlands.

As in other European countries, consumption of canned beans is growing in the Netherlands, driven by demand for healthy food and fast meal options. Canned beans are mainly used for fast bean-based meals and increasingly as an ingredient in ethnic cuisines such as Mediterranean, Indian and Japanese food.

Examples of Dutch canned bean importers include TRABOCCA B V.

Belgium: shrinking market

Belgium is the fourth-biggest importer of canned beans in Europe, accounting for 7% of European imports by volume in 2021. However, the volume of Belgian imports decreased 10% over the past five years, from 31.5 thousand tonnes in 2017 to 28.5 thousand tonnes in 2021.

The Netherlands supplied 33% of Belgium imports in 2021, followed by France (29%), Kenya (11%) and Germany (5%).

Sweden: a fast-growing market

Sweden is the fifth-largest importer and consumer of canned beans in Europe. In 2021, imports reached 16.7 thousand tonnes. Sweden accounts for 4% of total European imports by volume.

Between 2017 and 2021, imports increased by 31% in value and 22% in volume annually. Sweden is mainly supplied by Italy. Italy represented 80% (13.3 thousand tonnes) of Swedish imports in 2021, followed by the Netherlands (8%), Germany (4%) and France (3%).

The Swedish market for canned beans is still developing, with only a few direct importers. Canned beans are mainly used for fast bean-based meals and increasingly as an ingredient in ethnic cuisines such as Mediterranean, Indian and Japanese food.

Austria: a fast-growing market

Austria is one of the leading importers and consumers of canned beans in Europe, making up a 4% share of total European imports in 2021. Austrian imports of canned beans increased by on average 26% in value and 6% in volume annually between 2017 and 2021.

In 2021, Austrian canned beans imports reached 1.64 thousand tonnes and €15.5 million. In 2021, the leading supplier of canned beans to Austria was Italy, with a 63% volume share, followed by Germany (14%), Hungary (9%) and the Netherlands (7%). Very small quantities were imported from France (4%).

Tips:

Consider exporting to countries whose imports are growing, such as the Netherlands, Sweden and Austria, in addition to the largest European importers.

See Eurostat data for information about canned beans imports in the top European countries.

4. Which trends offer opportunities on the European canned bean market?

In Europe, market interest in canned beans and legumes is being driven by consumer demand for meat protein replacements and convenience. Increased demand for vegan and nutritious foods offers opportunities for developing country exporters. Customers are also looking for greater convenience and ease of preparation, which canned goods and vegetables can provide.

Veganism offers opportunities for protein-rich canned products

Veganism is popular in Europe. Plant-based diets are recommended for ethical, ecological and health reasons. Vegans do not consume animal-based foods (eggs, milk, etc.). Instead, they eat plant-based foods such as vegetables, mushrooms, beans, grains and meat substitutes. Vegans tend to consume more vegetable proteins, including soy products such as edamame beans (one of the highest protein sources in plant-based diets), lentils and chickpeas, which have no animal proteins.

In 2020, the European Commission (EU) launched the Farm to Fork Strategy (FFS), aimed at encouraging a shift towards planet-friendly, plant-based diets in Europe. This strategy is part of the European Green Deal, which has committed €100 billion over the years from 2021 to 2027 to achieve carbon neutrality in the EU by 2050. The FFS has recommended allocating €10 billion of these funds to research into sustainable food sources, including animal alternatives and other plant-based proteins.

According to a survey of thousands of people across Europe in 2021, a significant shift towards plant-based foods is taking place, with 46% of respondents having already substantially cut back on meat and just under 40% wanting to consume less meat in the near future. Researchers interviewed over 7,500 people from ten countries about their opinions on meat and plant-based alternatives. Only 7% of respondents were full vegetarians or vegans, while roughly 30% were flexitarians, who eat less meat by substituting plant-based items.

Consolidations in the canned industry

Mergers and acquisitions, as well as production centralisation, are changing the European canned food industry. Decreasing demand for canned food in the European retail market has led to overcapacity and a resulting price war, particularly among private label providers. European companies are therefore seeking to cut manufacturing costs. One example is the merger of three firms (leading Belgian vegetable supplier Greenyard Foods, fresh produce giant Univeg and agricultural product supplier Peatinvest) in the Greenyard Foods Group to centralise the global supply of fresh, frozen and canned products. Another is the acquisition by Bonduelle of Delmonte's Canadian canning and marketing operations.

Convenience remains important

More and more consumers want food that is convenient. The canned bean industry is increasingly producing cans with easy-open lids. Other convenient packaging methods include smaller-sized cans and the stand-up pouch, which is gaining popularity in Europe.

Convenience is also tied to increasing demand for flavour innovation and the development of product formulations for home cooking. This trend includes ready-made canned mixes that combine canned beans with other food ingredients.

Other popular trends:

- Consumers are becoming more conscious of the packaging used in cans. The number of ‘BPA-free’ claims on marketed cans is growing.
- Organic beans and pulses are becoming increasingly popular. Organic bean processors are also lowering their salt and sugar content, marketing cans that contain only beans and water.
- With rising customer demand for single-serve convenience items, demand for smaller cans is increasing. Standard 400 g cans are often too big for small servings.
- Increasing interest in ethnic cuisines, such as Mediterranean, Indian and Japanese food, is boosting demand for less familiar beans and pulses such as chickpeas, lentils, lupin beans, fava beans and adzuki beans. More European consumers are turning to hummus and falafel as animal protein substitutes.
- Several global and European programmes encourage eating beans. Following the International Year of Pulses, 10 February has been designated as World Pulses Day.

Tips:

Read more about developments in can packaging on the website of the International Packaging Association and attend specialised events on packaging, such as MeetingPack.

Promote the consumption of canned beans and pulses in cooperation with industry partners.

Consider investing in new packaging equipment in cooperation with your European buyers.

Consider using packaging such as pouches or cartons that are becoming more popular 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.

This study has been carried out on behalf of CBI by M-Brain.

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