The European market potential for pigeon peas

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The pigeon pea has been cultivated for thousands of years and is a staple food in its main growing regions. Like other pulses, it is a healthy food choice thanks to its high levels of protein and nutrients. Pigeon peas are versatile in their uses and inexpensive despite being imported. While they are still relatively unknown in Europe, current food trends offer interesting market opportunities for new suppliers, especially in the UK, Belgium and the Netherlands.

Contents of this page

1. Product description

This study focuses on pigeon peas. Unlike other pulses, pigeon peas are mostly offered as dried legumes on the European market. It is difficult to find cooked and canned or otherwise prepared pigeon pea products. Dried, shelled pigeon peas, whether or not skinned or split, are traded under the Harmonized System (HS) code 0713.60. Split pigeon peas (*Cajanus cajan*) should not be confused with split chickpeas (*Cicer arietnum*) or split yellow peas (*Pisum sativum*). While they look very similar, they belong to different species of the leguminous plants family. Pigeon peas are known under a variety of common names, including toor dal, togari bele, Congo pea, Angola Pea, red gram, no-eye pea, tropical green pea, gungo pea, and Puerto Rico pea; pois cajanor or pois d'Angole in French; and gandú in Spanish.

The pigeon pea is produced in tropical and sub-tropical regions. Its cultivation goes back more than 3,500 years, spreading from India to Africa and the Middle East, and further to the Caribbean and Latin America. Unlike other pulses, the pigeon pea is a perennial bush. It reaches heights of 2 to 4 metres and lives for about five years. However, in commercial cultivation the peas are grown as annual crops. Pigeon peas grow pods with four to five seeds that can range in colour from cream to light brown, purple and grey. Pigeon peas are robust plants that can deal with poor soils and little water. Smallholder farmers also use the seeds as chicken feed while the plants provide shelter for birds. The roots are said to deter rats and other rodents.

Figure 1: Pigeon pea plant with pods

Source: Pixabay, Malsawm Tunglut

Pigeon peas are a highly versatile (PDF) crop. They can be consumed as dry or green seeds and green pods. The seeds are either consumed as dehulled splits, whole, canned, boiled or roasted, or ground into flour for use in desserts, noodles and snacks. Pigeon peas are a major source of protein, especially in South Asia. In Indian

cuisine they are used as a versatile ingredient in *dals* and traditional dishes made with dried split peas or lentils. They are also commonly used in Caribbean and African rice dishes, stews and soups. Their high nutritional value also makes them a good animal feed.

2. What makes Europe an interesting market for pigeon peas?

Immature European market has growth potential

Due to the tropical and subtropical nature of the crop, Europe does not have its own commercial production of pigeon peas. In the last five years, imports fluctuated between around 2,100 tonnes in 2019 and over 4,000 tonnes in 2017 and 2020 (Figure 2). About 15-33% of the imported volume is re-exported to destinations outside Europe, mainly the USA and the Caribbean.

Compared to other dried pulses like beans or lentils, total European consumption of pigeon peas is very low with just 3,600 tonnes in the peak year 2020. However, pigeon pea producers can benefit from the potential for consumption increases on the immature European market and its dependence on imports. The current economic situation with rapidly increasing consumer prices and high inflation creates opportunities for a product like pigeon peas, which is non-traditional, low-cost, healthy, and has a long shelf life.

Tips:

Europe is still a niche market for pigeon peas. Visit the CBI website to learn more about opportunities for entering this European market and how to find buyers.

Pigeon peas fit into healthy and nutrition-conscious diets.

Consumption of plant-based proteins is expected to further increase in the coming years. This growth is driven by the ongoing trend towards healthier diets and a growing share of plant proteins. Moreover, Europe is a frontrunner in finished product innovation involving pulses like lentils, beans and peas. Innovative food products create new market opportunities outside of plain dried pulses for cooking. Pigeon peas, as a healthy and easy-to-prepare newcomer, could benefit from these developments.

Tip:

Stay informed about food trends and developments in Europe by following the news on specialised websites like Food Navigator, Food Drink Europe (an industry association that also publishes surveys on consumer trends) and The Natural News Desk.

Figure 3: Split pigeon peas

Source: Pixabay, Ganesh Balasubramanyam

3. Which European countries offer the most opportunities for pigeon peas?

The six largest European importing markets – the UK, Belgium, Portugal, Italy, France and the Netherlands – receive on average 97% of dried pigeon pea imports to Europe (Figure 4). However, particularly Belgium and the Netherlands act as redistributors to other countries. The UK is by far the leading consumer market for pigeon peas in Europe. The peak in imports observed in 2020 is in line with the overall surge in home cooking and the higher demand for products with a long shelf life during the COVID-19 pandemic.

United Kingdom: largest market due to ethnic consumption

The UK is the most important market for dried pigeon peas in Europe. Consumption is nowhere near that of other pulses like lentils or white beans, but volumes consumed in the country are much higher than elsewhere in Europe.

This market is driven mainly by the demand for ethnic foods. The UK has a large Indian community with an important Indian food sector. There are also communities from the Caribbean and East Africa with traditional food use of pigeon peas. In addition to food stores, the ethnic food service sector contributes to pigeon pea consumption. The pulses are also sold in some mainstream supermarkets and used in ready-made dishes offered by retailers. After a significant dip caused by the COVID-19 pandemic, the overall ethnic restaurant and takeaway market in the UK is set to grow by 61% until 2026. Combined, these two market segments will provide a stable and slowly growing market for pigeon peas.

While supplies fluctuate from year to year, Malawi, India and Myanmar have been key origins of pigeon pea imports to the UK in recent years. Various important wholesalers and packers of pigeon peas focussing on the Indian food segment operate in the UK and also sell in other European countries, like AGT Poortman, Pride Asia Food, TRS and Western Impex.

Belgium: redistributor of pigeon peas

Belgium is the second most important European importer of pigeon peas after the UK. Imports fluctuated between 1,000 tonnes in 2017 and 350 tonnes in 2021. Most come from Tanzania and Kenya, with varying shares per year. Belgium re-exports most of these volumes to the USA and Trinidad & Tobago as well as some European countries. The drop in imports of recent years may be due to trading partners sourcing (temporarily) via other routes. A leading Belgian trader is Casibeans. It is a specialist in the sourcing of conventional and organic pulses and a supplier of the food industry. Belgium's role as a trading hub offers opportunities for suppliers of niche products.

Netherlands: small pigeon pea trader with growth potential

The Netherlands imported between 80 and 150 tonnes of pigeon peas annually in the last five years. Around two-thirds of this volume is commonly re-exported to various European countries. Domestic consumption is currently still low but may benefit in the future from the interest in healthier diets and growing sales of alternative protein products. Several producers of meat alternatives that use plant-based protein sources are located in the Netherlands, like De Vegetarische Slager (The Vegetarian Butcher, Unilever) and Valess (FrieslandCampina). The Netherlands is also home to several large suppliers of products to the Indian ethnic food sector in Europe, like NRG and AGT Poortman.

Other European countries: small import volumes from varying suppliers

Other European countries, like Portugal, Italy and France, also report small volumes of pigeon pea imports. In all cases the imported volumes are much smaller than those of other pulses, like lentils or beans. As in other European markets, the ethnic food sector is the main destination for these imports, mostly driven by demand for Asian, African and Latin American cuisines.

Tips:

Connect with importers and buyers in the UK as the largest European market for pigeon peas. Find relevant companies in the members' directory of the industry association Pulses UK and the CBI study on Entering the European market for pigeon peas.

Target importers and distributors in Belgium and the Netherlands who can help you with other European markets and buyers that are more difficult to reach directly.

4. Which trends offer opportunities or pose threats on the European pigeon pea market?

Pigeon peas are not a traditional staple of European diets. The market is currently still small and dominated by ethnic consumption, especially in countries with large ethnic communities from South Asia and Africa. The growing market for plant-based protein alternatives could offer future opportunities. European health authorities increasingly recommend eating pulses like beans, lentils and peas as part of a nutritious and healthy diet. Use of pigeon peas in innovative food products is also expanding.

The European ethnic food sector is growing, but at a slow rate

Ethnic groups from regions that traditionally consume pigeon peas have grown across many European countries. Accordingly, the ethnic food market that offers opportunities for pigeon pea producers is also expected to continue growing. However, this growth is expected to be relatively slow because the European market for ethnic food products is dominated by Mediterranean and Middle Eastern cuisines. This leaves less room for the expansion of other cuisines.

Health food and plant-based diets increase demand for pulses

The shift in consumer eating patterns and changing diet trends has been ongoing for several years. Plant-based diets are increasingly common in developed countries. As a result, the food market (PDF) for plant proteins in Europe is growing at a double-digit rate. European demand for healthier foods increased during the COVID pandemic. In 2021, 74% of European consumers (PDF) stated that eating healthy foods is important to them.

Healthy food options that contain pulses are becoming mainstream in various segments, including the fast-food and convenience sectors. More European consumers are looking for alternative proteins to supplant animal proteins. Pulses are a nutritious option with a much smaller carbon footprint than meat. Market research suggests that meat-free convenience products, like plant-based burgers or pre-packed salads containing legumes and grains, will continue to show significant growth. Recently, prices for products using plant-based protein sources dropped below those for animal meat. This means they are becoming more affordable.

Pigeon peas fit into these trends because they are high in nutrients and fibre and low in calories. They are rich in several vitamins, including B-complex and C, as well as essential minerals. Their protein content is high, at around 22%. This can give them a role as a nutritious ingredient in plant-based diets, including in markets where they are not yet well-known. Pigeon peas can also be used instead of soybeans to make plant-based products like tempeh or yellow tofu.

In line with the trend towards healthier and more sustainable diets, organic and Fairtrade-certified consumption are important niches. Europe forms the second most important region globally for organic consumer products. Countries offering interesting opportunities for such products include Germany, the UK, France, Switzerland, Austria and Denmark. A company that caters to the demand for organic pulses is the Indian exporter Nature Bio Foods (NBF), offering whole, split and de-husked pigeon pea varieties. NBF holds certifications under various

organic schemes with relevance for the European market (BioSuisse, Naturland, Demeter), as well as food safety and social certifications (Fairtrade). A subsidiary in the Netherlands helps to better serve the local market.

Tip:

Study the EU labelling guidelines if you want to export pigeon peas already packed in consumer-sized portions. Under EU law, only nutrition or health claims that are clear, accurate and based on scientific evidence are allowed. Consult the EU Register of Nutrition and Health Claims for guidance.

Novel products create new opportunities for pulses

The market for alternative proteins is a rapidly developing and growing segment. It has reached a global value of US$2.2 billion. Uses of such proteins include plant-based beverages and meat and dairy alternatives. Pulses are seen as a very suitable source of protein concentrates and isolates because of their high protein content, easy availability and low cost. Proteins from pulses are also considered to have useful chemical traits, and to be healthier than conventional protein sources like animals, soy or wheat. While currently peas are the main pulse used in the production of protein concentrates and isolates, other pulses are increasingly playing a role as they offer different characteristics. This may also offer interesting future market opportunities for pigeon peas.

Europe increases local production and sourcing of pulses

Europe does not produce enough high-quality plant proteins to meet domestic consumption and relies on imports to fill this gap. To reduce this import dependence, the European Union is developing a plant protein strategy. Whether this strategy will be successful depends on a range of factors. There is debate on whether agricultural conditions allow for large-scale production of plant proteins, competitiveness with imported plant proteins, and availability of suitable land. Benefits like sustainable soil management, crop diversification and independence from imports of crop proteins are also part of the discussion.

The agricultural policy of the European Union (CAP) already includes several measures (PDF) to support the production of pulses like beans, peas and lentils. The new CAP will enter into force in 2023. It aims to integrate the sustainability goals in the European Green Deal and the Farm to Fork and biodiversity strategies. Its implementation would lead to an increase in domestic European production of pulses like peas, beans and lentils.

The ongoing global logistics problems and high freight costs are expected to last for a longer time and may further encourage sourcing of locally produced legumes. However, it is unlikely that imports of protein-rich pulses to the European market will become unnecessary anytime soon.

Tips:

Read the CBI publication Entering the European market for pigeon peas for more information about European market channels.

Find useful insights on broader European market trends in the CBI study on which trends offer opportunities or pose threats on the European grains, pulses and oilseeds market.

Visit the website of EIT Food, a European food innovation community, to find insights into the latest thinking around healthy and sustainable food. Among the sources is a European market map (PDF) that provides an overview of key players in alternative proteins.

Profundo carried out this study on behalf of CBI.

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