The European market’s potential for dried lentils

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Lentils have been eaten since prehistoric times and are a staple food in many cultures. Like other pulses, they are an excellent source of protein and nutrients. Lentils are a very versatile and inexpensive food product. This makes them an important source of high-quality protein in diets. In addition to their use in traditional and ethnic foods, these qualities are also advantageous in increasingly popular healthy, vegetarian and vegan diets. Demand is also driven by a large canning industry.

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1. Product description

This study focuses on dried lentils. Imports of cooked and canned or otherwise prepared lentil products are not considered in detail. However, the European industry for processed lentils can be an important target group and is considered as a potential customer for dry lentil imports.

Dried, shelled lentils, whether or not skinned or split, are traded under the Harmonized System (HS) code 0713.40.

The lentil (*Lens culinaris*) is one of the oldest cultivated grain legumes and an important cool-season crop. Lentils were likely first domesticated in the Near East and have since spread around the world. They are grown across different climatic zones, including the Mediterranean, India and other South Asian countries, North America and southeastern Australia.

Lentils are lens-shaped and grow in short, flat pods. They are available in a range of sizes, shapes and colours. There are four main types of lentils: brown lentils; green lentils; red and yellow lentils; and specialty lentils, such as Black Beluga and du Puy. Different cuisines have preferences for different types of lentils.

Figure 1: Different lentil varieties

Source: Pxhere

Lentils serve as a versatile staple food in many countries around the world and are used as a key ingredient in vegetarian dishes. Due to their low price and nutritious value, lentils were referred to as “the poor man’s meat” for many centuries. Increasing vegetarianism and veganism in the West is one of the factors contributing to increased lentil consumption. Lentils are considered a healthy food thanks to their relatively high protein content of 26% and their content of fibre and minerals like iron and zinc. Lentils are processed into whole or split lentils. Lentil flour and fractions like lentil protein are used in the production of bakery products, snack foods and other applications.

2. What makes Europe an interesting market for lentils?

European consumption is underdeveloped and depends on imports

European lentil production (PDF) increased from 75,000 tonnes in 2017 to 116,000 tonnes in 2021. France and Spain are the largest European producers of legumes, including lentils. Despite a growing surface planted with lentils, Europe’s own production cannot fulfil the demand. Some of the specialty lentils from France and Spain are also exported to international markets. Therefore, Europe is a net importer of lentils.

Lentil imports fluctuated around 230,000 tonnes in the last five years (Figure 2). Imports are dominated by developed countries, while developing countries supplied around one-third in recent years.

Imports peaked in 2020, driven by the COVID-19 pandemic, which saw increased home cooking and demand for shelf-stable products. Overall European lentil consumption remains on a low level at an estimated 15 gr per capita per week. However, legumes are increasingly promoted as healthy and affordable protein sources. Lentil producers can benefit from the potential for higher consumption in the underdeveloped European market and its dependence on imports.

Tip:

Learn more about opportunities for entering the European market for dried lentils on the CBI website. You can build long-lasting buyer relationships if you fulfil buyers' volume, quality, and food safety requirements.

Global economic and political developments may create supply gaps

Global supply chains are influenced by economic and political changes. These changes can lead to supply gaps. For example, Turkey's lentil exports to Europe grew rapidly since 2017, at an average annual rate of 13%. However, Turkey imposed an export ban on red lentils in March 2022. The ban is motivated by the country's skyrocketing inflation and high prices for staple foods. Meanwhile, trade between the European Union and Russia is affected by Russia's war on Ukraine. While agricultural products are not included in European sanctions (PDF) against Russia, traded volumes are likely to decrease for the foreseeable future. They are also affected by logistical bottlenecks in the Black Sea. Russia supplied 3-5% of lentil imports to the European Union in recent years.

Such changes in the global supply chain may create opportunities for new suppliers who are able to reliably offer similar qualities and volumes.

Lentils add 'plant power' to newly launched food products

Europe is seen as the frontrunner in finished product innovation involving lentils. These products create new market opportunities. Pulse Canada referred to Europe as "the biggest innovator for processed lentils."

New products launched in Europe include crisps and chips, rice and pasta products based on red lentils, and even breakfast cereals containing lentil flour. Lentils are also used to boost the protein and fibre content in meat-free, ready-made products.

Tip:

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

3. Which European countries offer most opportunities for dried lentils?

The six largest European importing markets – Spain, Italy, Germany, the UK, France and the Netherlands – received more than 85% of dried lentils entering Europe (Figure 3). They also act as redistributors to other European countries, with Belgium and the Netherlands leading.

Important market drivers are traditional lentil-consuming markets in Italy, Spain, Germany and France, and the strong ethnic consumption in the UK. France and Spain, both producers of specialty lentils, also export to non-European destinations. The peak in imports observed in 2020-2021 is linked to the increase in home-cooking and higher demand for products with a long shelf life at the peak of the COVID-19 pandemic.

Spain: large traditional market depends on imports to meet demand

Spain itself is a leading European producer of lentils. Production doubled (PDF) from 23,000 tonnes in 2015 to 46,000 tonnes in 2020. In addition to common lentil production, Spain is known for several typical lentil varieties that are produced under an origin standard (Protected Designation of Origin, Protected Geographical Indication). These include the green 'Lenteja de la Armuña' and the brown 'Lenteja de Tierra de Campos'.

However, the country relies on imports to meet consumption demand, making it the main European importer of dried lentils in recent years. On average, Spain imported more than 50,000 tonnes per year between 2017 and 2021. The USA and Canada are the main suppliers, together accounting for more than 90% of Spain's imports. Other European countries account for the small remaining volumes. Direct imports from developing countries are so far negligible.

Lentils, beans and peas are an important ingredient in traditional Spanish dishes. Lentils are used in various stews and soups, often combined with meats and vegetables. Legume-based dishes are also regularly offered as a school lunch (PDF). The traditional use of different types of lentils and their relatively high consumption make Spain an interesting entry point to the European market. However, you are competing with lentils from the USA and Canada as well as with established local varieties. A noticeable development is the ongoing shift from dried towards the more convenient canned (PDF) legumes. Spain also exports these to other European countries.

Spanish company Legrumbros Curto imports and markets a variety of lentils, chickpeas and beans. Companies offering dried lentils of different origins include La Cochura and Legumbres Luengo. Cidacos and Riberero are producers of canned lentil products.

Italy: traditional consumption and a growing market for alternative proteins

Italy is another important lentil consumer in Europe. A drastic decrease in production in recent decades means that imports account for the largest part of consumption. Specialty lentil varieties grown in Italy include the greenish-brown Castelluccio and the green Altamura. Both are produced under an origin standard.

Lentils are traditionally used in a variety of hearty soups and stews. The well-known Italian minestrone soup is often prepared with lentils and other dried legumes. Lentil dishes are traditionally served on New Year's Eve as they are believed to bring luck, good fortune and prosperity. More recently, COVID-19 accelerated a trend towards healthier, plant-based food products, and there is an increasing offer of legume-based pasta and snacks in Italian supermarkets.

Canada (59%), Turkey (16%) and the USA (15%) were important suppliers to the Italian market in 2021. Other suppliers accounted for very small shares. The reliance on imported lentils to meet demand creates opportunities for new suppliers. The Turkish export ban (PDF), which forbids the export of red lentils from Turkey since March 2022, may create opportunities for new suppliers.

Dried lentils are sold in different varieties in Italy and also used in legume mixes for soups and stews. Retailers often offer their own brands for these products. The industry association ANICAV represents around half of the legume canning industry in Italy.

The large Italian canning industry can be an interesting customer if you want to sell to the processing industry. Italy is the global leader in legume processing and canning. Gruppo La Doria and Cirio are producers of canned legumes, like lentils, for private labels as well as their own brands.

Traditional Italian pasta producers like Barilla or Rummo now offer gluten-free pasta made from various legumes, including red lentil flour.

Tips:

If you are interested in supplying the canning industry, remember that varieties that keep their shape during cooking are most suitable.

You can find tips on supplying the canning industry in CBI's study on Exporting Canned Beans and Pulses to Europe.

Germany: important organic market for legumes

Until about 100 years ago, Germany had a considerable domestic lentil production, especially in the warmer south-west of the country. Nowadays cultivation is limited to a small, mostly organic niche and imports fulfil the demand for lentils.

Lentils are mostly sourced from Turkey (34% in 2021), Canada (28%) and the USA (16%). In recent years, direct imports from Kazakhstan saw higher growth rates than other origins. The country's share increased from less than 1% of total German imports (220 tonnes) in 2017 to 4% (1,500 tonnes) in 2021. Around 16% of German imports of dried lentils are re-exported to neighbouring countries like Austria, the Netherlands and Switzerland. The important role of Turkey as a supplier to the German market has been affected by the export ban on red lentils implemented in March 2022. Imports of Turkish lentils to Germany dropped by 33% in the first half of 2022 compared to 2021. This development creates opportunities for other red lentil producers that can meet the requirements for volume and quality.

Consumption of lentils in Germany is linked to traditional uses, especially lentil soup (*Linsensuppe*), which is a common dish in winter that uses brown lentils. Moreover, Germany is home to large ethnic groups from Turkey, Morocco and Syria. These Mediterranean and Middle Eastern cuisines commonly consume especially red lentils as a protein-rich foodstuff.

The share of vegetarian and health-conscious consumers is increasing in Germany, driving up demand, especially for organic legumes. These consumer groups are likely to contribute to further market growth, including for lentils. Suppliers that can offer organic lentils have an advantage. The German market for organic food (PDF) accounts for more than one third of organic sales in the European Union and saw historic growth during the COVID-19 pandemic.

Schlüter & Maack is a German importer and processor of legumes that supplies the European food industry. The company sources legumes from contract farming with Canadian growers, as well as China, Turkey, and countries in Africa and Central and South America. Cleaning of the lentils takes place upon arrival in Europe. Müller's Mühle is a leading processor of lentils and other legumes in Europe. Davert, Rapunzel, Denree and Bode Naturkost offer organic-certified dried lentils, among other products. Importers offering Oriental and Middle Eastern lentil products on the German market include Pamir Food and Heuschen & Schrouff. CFT and Gunarajan import a variety of dried lentils from India.

United Kingdom: ethnic cuisine drives lentil consumption

The UK is consistently among the large European importers of dried lentils. A new initiative to grow local lentils is still in the trial stage. Similarly to other European countries, lentil soup and stew from brown lentils are cheap dishes traditionally served at home or in pubs. Lentils are a key ingredient in popular South Asian cuisine. With its large Indian, Pakistani, Sri Lankan and Bangladeshi communities, ethnic shops and food services play an important role in lentil consumption. Curries and other South Asian dishes are highly popular across all population groups. Moreover, Middle Eastern and North African communities are growing, all traditionally consuming lentils in their diets. Like Germany and France, the UK has a fast-growing organic market that offers opportunities for suppliers who can fulfil the European requirements for organic produce.

Canada has been the top supplier of lentils to the UK for years. In 2021, it accounted for 46% of imports of dried lentils. In the last five years, imports from Turkey grew from 15% in 2017 to 32% in 2021. However, the volume supplied by Turkey is expected to decrease in 2022 due to the recent export ban.

Phaseolus is a food processor focussing on lentils and other legumes for fast-cooking products. The ethnic market is mostly served by specialised importers and wholesalers who have their own processing and packing facilities. Relevant importers include TRS and Western Impex.

France: leading European lentil producer imports to fulfill demand

France is the leading lentil producer in Europe, with around 47% of the total volume. Several typical lentil varieties are cultivated but green lentils are the most important. The specialty green lentils from the du Puy and Berry regions are the most famous and exported worldwide. Lentils are used in various soups and stews. French lentils are also used in salads because they maintain their shape during cooking.

Consumption of legumes like lentils and chickpeas is encouraged by the French government. The government recommends that people eat lentils and other legumes at least twice per week. A 2021 survey found that almost half of French people eat legumes at least once per week. This suggests that there is room for growth.

Lentil imports to France come mostly from Canada (52% in 2021), China (14%) and Turkey (13%). Direct supplies from other Asian or African countries are very small. As in other European countries, imports of red lentils from Turkey will drop significantly in 2022, creating market opportunities for other suppliers. France is the second-largest market for organic products in Europe, creating opportunities especially for organic-certified lentils.

Important companies selling dried lentils and other legumes include Trescarte and Haudecoeur. Asseman Deprez markets lentils under its own brand Videlys as well as for private labels. VracBio is a wholesaler of organic lentils and other legumes. Duru markets its organic lentils and other dried pulses in biologically degradable packages, promoting them as ‘super-heroes’.

The Netherlands: trade hub supplying other European countries

The Netherlands is one of the leading importers and distributors of dried lentils in Europe. In 2021, lentils came mainly from Turkey (45%), Canada (29%) and India (6%). Almost 60% of imports were redistributed to other European countries.

Lentil soup is a traditional part of Dutch culinary culture, but consumption is low. However, the per capita consumption of lentils is expanding and is expected to grow further. Between 2017 and 2021, net imports of dried lentils increased by 6%. A factor driving the growing consumption of legumes like lentils is an interest in healthier diets. The Dutch Health Council advises consuming legumes at least once per week. Demand for different types of lentils is also driven by the influence of a sizeable ethnic population with Mediterranean and Northern African ancestors.

Jonas is specialised in the import and packaging of dried legumes, including lentils. Products are supplied to wholesalers and supermarkets. Wessels supplies dried legumes to various food service channels such as canteens and healthcare facilities. Nature Bio Foods is a Dutch importer and European distributor of organic products such as lentils from India.

Tips:

- Learn about the specific preferences in different European markets to develop your market strategy. Favourite lentil varieties can differ between Mediterranean countries like Spain and Italy and more Northern countries like Germany, or markets with large ethnic communities like the UK. Based on the characteristics of your product you can then narrow down the most promising markets.

Target importers and distributors in the Netherlands and Belgium to reach European markets and buyers that may be more difficult to connect with directly.

Get insights into the market developments and requirements of potential European buyers at an international trade fair. Important food fairs in Europe are Anuga (Cologne, Germany), Biofach (Nuremberg, Germany, the world's largest organic trade fair), Food Ingredients Europe (2022 in Paris, France, jointly with Health Ingredients Europe), and the international bakery trade fairs Südback (Stuttgart, Germany) and iba (Munich, Germany).

Figure 4: Traditional lentil soup consumed in Europe

Source: Pixabay, Matthias Lipinski

4. Which trends offer opportunities or pose threats in the European lentil market?

The European market for dried lentils is expected to grow. The market is roughly segmented into traditional consumption, ethnic cuisines and the growing niche for plant-based protein alternatives. Traditional consumption of lentils is expected to remain stable. Pulses, like lentils, are increasingly recognised as an important addition to a nutritious and healthy diet. This is reflected in recommendations by European health authorities and the appearance of lentils in various new products. The growing market share of organic products also offers opportunities to new suppliers.

Health food and plant-based diets increase demand for lentils

European demand for healthier foods has been growing for years and rose further during the COVID pandemic. In 2021, 74% of European consumers (PDF) stated that a healthy diet is important to them. The shift in consumer eating patterns towards health-minded consumption is ongoing.

Plant-based diets are increasingly common in developed countries. In the European Union, the food market (PDF) for plant proteins is growing at a double-digit rate per year. Innovations in pre-cooking processes are helping this development. More conveniently packed, ready-to-eat lentil products have entered the market in recent years, for example those by Hak (the Netherlands). All food segments are seeing an increase in healthy food alternatives with legumes as a main ingredient. This includes the fast-food and convenience sector. Plant-based burgers or pre-packed salads with legumes and grains are now widely available as alternatives to meat. These products are expected to show significant growth in the coming years. Meanwhile, prices for these products are beginning to drop below animal meat. This makes them more attractive for consumers.

Lentils are promoted as being nutritious and very affordable. Their protein content is high, at about 26%. Moreover, lentils are rich in fibre, vitamins and minerals, such as vitamin B, magnesium and iron. Lentils also have a high content of amino acids that are difficult to find in other plant-based protein sources. This makes them a valuable ingredient in plant-based diets. More and more European consumers are looking for alternative proteins instead of animal proteins. This is partly because they want a healthier diet, but also because of climate change. The increasing droughts in Europe have ignited a debate about the high water use for meat production as compared to plant-based proteins like lentils.

In line with the trend towards healthier and more sustainable diets, organic and Fairtrade-certified products are interesting niches for pulses. Europe is the second most important region globally for organic consumer products. Countries that are particularly interesting for such products include Germany, the UK, France, Switzerland, Austria and Denmark. Among the companies catering to the demand for organic pulses is the Indian exporter Nature Bio Foods (NBF). It 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.

Besides these consumer trends, lentils are valuable for people with diabetes and people on low-carbohydrate diets. This is because lentils do not cause a rise in blood sugar levels.

Lentils have high potential for use in novel plant-based foods thanks to their high protein content and low carbon footprint. The market for alternative proteins is a rapidly developing and growing segment. It has reached a global value of US$2.2 billion. Proteins from pulses are considered to have useful chemical traits and to be healthier than conventional protein sources like animals, soy or wheat. The European Smart Protein research project is looking for ways to replace traditional dairy proteins with lentil-protein isolate, or to use lentils instead of eggs in baked goods.

Legume flour, also from lentils, has increased in popularity as a gluten-free ingredient in recent years. Lentil flour is offered as a stand-alone product, like red lentil flour by Müller’s Mühle. It is also used in gluten-free crackers, organic and conventional crisps and lentil-based pasta products. Crisps producers like Tyrrells, who traditionally use potatoes, have now added a variety of lentil-based crisps to their portfolio.

Tips:

- Make sure you understand the EU labelling guidelines. The EU only allows nutrition or health claims that are clear, accurate and based on scientific evidence. Consult the EU Register of Nutrition and Health Claims for guidance.
- Find insights into the latest thinking around healthy and sustainable food on the website of EIT Food, a European food innovation community.

Figure 5: Fresh pasta and crisps based on red lentil flour

Source: Profundo

Ethnic food sector increases demand for lentils

Ethnic groups have grown across many European countries and influenced local food cultures. Non-traditional products have become increasingly popular and are widely available in stores and restaurants. Europe's growing demand for classic Mediterranean and Middle Eastern products is expected to drive the growth of the European lentil market in the coming years.

Lentils are an important staple in popular Middle Eastern and Indian cuisines. Turkish dishes based on red lentils include lentil soup (*mercimek çorbası*) and lentil-bulgur balls (*mercimek köftesi*). In Indian cuisine, a variety of lentils (*dhal*) are important ingredients in vegetarian staple dishes. *Koshari* is a popular Egyptian vegetarian dish based on rice and lentils that is becoming increasingly popular in Europe.

Non-food use of lentils

The use of lentils and other legumes as a source of protein in non-human food uses may also create new opportunities on the European market. Lentils and lentil flour are used in pet foods for dogs as a source of protein. Non-food grade lentils can be used in animal feed for cattle and other kinds of animal feed as an alternative to soybeans. Lentil flour is an attractive ingredient in animal feed due to its higher nutritional value compared to other grain flours.

Competition from increasing European production

Europe has a deficit in domestic production of high-quality plant proteins. This increases reliance on imports of soybeans. Especially in Latin America, soy cultivation has been linked to serious environmental and social impacts. Therefore, the European Union is developing a plant protein strategy that aims to increase European production and reduce dependency on imports from third countries.

The agricultural policy of the European Union (CAP) already includes several measures (PDF) to support the production of lentils and other legumes. The new CAP will enter into force in 2023. The EU's new strategy could lead to lower imports. Another development that could lower imports is the EU’s goal to reduce pesticide use by 50% by 2030. Further tightening of maximum residue limits on imported products seems likely. An example is the widely used pesticide glyphosate, which is allowed in the EU until 15 December 2022. Its use may not be renewed by regulators, in which case glyphosate residue limits could be tightened and further encourage European production.

Moreover, the COVID-19 pandemic as well as the Russian war on Ukraine have caused logistical problems and high freight costs that are expected to last for a longer time. These developments may further encourage local sourcing to ensure reliable supplies of lentils.

Tips:

- Read the CBI publication Entering the European market for lentils for more information about European market channels.
- Read the CBI study on which trends offer opportunities or pose threats on the European grains, pulses and oilseeds market.
- Obtaining organic certification for your products may be a good option for successfully entering the European market. Europe has a large organic market and regulation on pesticide residues is expected to further tighten. However, keep in mind that organic certification is connected to considerable costs.

Profundo carried out this study on behalf of CBI.