

Which trends offer opportunities or pose threats on the European grains, pulses and oilseeds market?

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Various powerful trends influence the European market. These trends come with both opportunities and challenges for producers of grains, pulses, and oilseeds. From the growing popularity of plant protein to the increasing importance of sustainability and social compliance, these forces are reshaping trade dynamics. A growing preference for authenticity in ingredients is creating new markets. Convenience, health consciousness, and e-commerce further drive the sector's transformation.

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1. Sector transformation is on the way

Several trends explained in this study will contribute to a transition in the European market for grains, pulses and oilseeds. By 2033, Western and Northern European markets will look different because:

- Europeans increasingly understand they can get their protein from plants – not only vegetarians and vegans but all health and/or planet-conscious consumers. This group is growing fast.
- European consumers are interested in authentic and new flavours. This has created substantial markets for lesser-known grains, pulses, oilseeds, and more traditional ingredients.
- European importers and distributors are making more of an effort to be (or become) sustainable. In the grains, pulses, and oilseeds sector, this mainly involves making their supply chains transparent and reporting on their environmental sustainability performance (footprints).
- More grains, pulses and oilseeds come from socially and ethically-certified production. This means prices will increase, and farmers and workers will earn a fairer income.

The variety of food products will continue to expand. Supplying or using original and authentic ingredients is a good way to offer a unique product. Well-designed storytelling can make it stand out from other products, thus

gaining consumer interest and market share.

2. The popularity of plant protein is increasing

Plant protein is becoming increasingly popular in Europe. This trend is driven by health consciousness, environmental concerns, culinary innovation, and an increasing focus on diets to build muscle. This can lead to an even higher demand for protein-rich grains, pulses and oilseeds. [Protein-rich grains](#) include kamut, teff, amaranth, quinoa, wild rice, millet, couscous, oats and buckwheat. [Protein-rich pulses](#) include black lentils, green lentils, split peas, navy beans, chickpeas, black beans and kidney beans.

[51% of European meat consumers reduced their annual meat intake](#) in 2023. Their main motivations were:

- health (47%)
- animal welfare (29%)
- environmental concerns (26%)

The Netherlands, Germany, France, and Italy are the main driving forces behind this trend. [Plant-based protein is the most trusted alternative protein](#) in Europe. It is more popular than competing products like cultivated meat and fungi. European consumers are most likely to replace animal-based meat with legumes - 57% eat legumes at least once a week, and 53% want to eat them more often. This means there are important growth opportunities for this product category.

The plant-based protein market is divided into [soy, wheat, pea, canola, potato, rice, and others](#). These proteins are made as isolates, concentrates, and more. They are used in food and beverages, health supplements, infant formula, animal feed, and personal care items. Estimations for the growth rate for European plant-based protein consumption are between a compound annual growth rate (CAGR) of 12-15% from 2020 to 2027.

[Oilseeds, especially oilseed cakes, can also be a good source of plant-based protein](#). Oilseed cakes are left after the oil extraction and are mainly used as cattle feed, compost amendment or plant conditioner. However, they can also be used for human consumption. For example, [soybean meal](#) (cake) is used in human food products like tofu and soy milk. This could be an interesting avenue to explore, as human oilseed cake consumption not only supplements existing protein sources but also solves the problem of oilseed cake disposal, along with generating additional income for the oilseed crop producers and processors.

Three major European food retail groups, [Ahold Delhaize](#), [Aldi Nord](#), and [Lidl](#), are [leading the shift](#) from diets heavy in animal meat and dairy to more plant-based diets. These supermarkets have set goals to increase the sale of plant proteins, such as whole foods and plant-based products, and reduce the sale of meat and dairy. Ahold Delhaize, for example, plans to set targets in all its European retail formulas by the end of 2024 to boost plant protein sales. Aldi Nord and Ahold Delhaize's efforts started in 2023-2024, focusing on the Netherlands.

Lidl, Europe's largest supermarket chain, is also working to increase plant-based protein sales. Lidl has set public targets to improve the plant/animal protein ratio in six European countries, including Germany, Belgium, and the Netherlands. Lidl has stated that other countries where it operates will also set similar goals in the short to medium term.

Protein-rich products are popular and increasingly plant-based

Many athletes, fitness enthusiasts and health-conscious people are turning to plant protein to meet their dietary needs. This ongoing trend is reflected in an [increase in the launch of products with a high protein claim](#). This change will likely reshape the European food landscape, leading to further innovation and diversification in the

plant protein industry.

Figure 1: Protein-rich pasta products on a European supermarket shelf



Source: [GloballyCool](#), August 2023

The misconception that animal-based proteins are better for muscle growth and performance is increasingly acknowledged, as more research highlights the effectiveness of plant-based protein sources. This has led to a surge in the availability of plant-based protein supplements and fortified foods catering to this consumer group. The reduction in animal protein consumption also leads to more interest in plant-based protein supplements.

Flexitarians are here to stay

The growth in popularity of plant-based diets and flexitarianism (having a primarily vegetarian diet but occasionally eating meat or fish) has dramatically boosted the demand for plant proteins. Between 2020 and 2022, [the sales of plant-based foods in 13 European countries increased by 21%](#). With an increasing awareness of the health benefits of reduced meat consumption, many Europeans are turning to alternative protein sources derived from grains, pulses and oilseeds. These plant-based proteins offer a wealth of nutrients, including fibre, vitamins and minerals, while often being lower in saturated fats and cholesterol than animal proteins.

[27% of European consumers across generations identify as flexitarians](#) – including 29% of Boomers, 27% of Gen X, 28% of Millennials, and 26% of Gen Z. As the number of flexitarians grows, so does the potential for grain, pulses and oilseeds. European consumers are most likely to replace animal-based meat with legumes (43%). They also prefer plant-based dairy alternatives (37%) and legume-based foods (37%). This offers opportunities for unprocessed legumes for direct consumption and legumes for processing in the industry.

Awareness of the environmental impact of food choices is increasing

Environmental awareness also plays an important role in Europe's shift towards plant protein. Concerns over the ecological footprint of animal agriculture, including its contribution to greenhouse gas emissions and deforestation, have led consumers to seek more sustainable protein options. Plant-based protein production generally requires less land, water and energy resources than livestock farming. This aligns with Europe's broader commitment to sustainable and responsible consumption, making plant proteins an attractive choice for environmentally conscious consumers.

Figure 2: Organic chickpeas in a mainstream supermarket in Spain



Source: [GloballyCool](#), September 2023

Culinary innovations are a driver of plant protein consumption

Culinary innovation and the increasing popularity of meat substitutes also play a crucial role in popularising plant proteins. European companies have invested heavily in [research and development](#) to create [plant-based products that mimic the taste and texture of meat](#), making the transition to plant-based diets more accessible and appealing. These innovations have led to a wider variety of plant protein options, ranging from tofu and tempeh to pea protein isolates and beyond.

European governments encourage consumption

Government policies and initiatives also support the growth of plant protein consumption in Europe. Many European countries have implemented policies to promote sustainable agriculture and reduce food production's environmental impact. This includes initiatives to incentivise the production and consumption of plant-based proteins and the development of supportive infrastructures for plant protein industries.

For example, [the Dutch Ministry of Agriculture, Nature and Food Quality strives for consumers in the Netherlands to consume equal amounts of plant-based and animal protein by 2030](#). On behalf of the Ministry, Wageningen Economic Research has developed the 'Protein Monitor'. In 2023, consumer diets in the Netherlands comprised of 39% plant-based proteins and 61% animal proteins. The Protein Monitor offers suggestions and insights to speed up the transition and will be repeated every year to track progress.

The Common Agricultural Policy (CAP) of the European Union (EU) provides several [measures to support the regional production of protein crops](#). It aims to reduce the supply gap in plant proteins and the dependency on imports that are connected to environmental and social issues in third countries. The new [CAP 2023-2027 entered into force in 2023](#).

Tips:

Stay informed about the plant protein market via sources like [New Protein](#) and the food ingredients market via [Food Ingredients First](#). By following the developments in the market, you can benefit from the innovations in plant-based foods as a supplier of protein crops.

Check [The Vegan Society](#) and the [Smart Protein Project](#) for more vegan and plant-based consumption data.

3. The health-conscious consumer group is growing

For years, many European consumers did not consider grains, pulses, or oilseeds part of a health-conscious lifestyle. Grains equalled white wheat bread, pulses were cheap fillings, and oilseeds were associated with sunflower oil. This has changed significantly in the last decade.

European consumers are increasingly aware of healthier alternatives to the standard grains, pulses, and oilseeds in their diets, boosting demand for these alternatives. As people make more informed decisions about their health and well-being, they increasingly turn to a diverse array of these ingredients to meet their nutritional needs.

A driving factor behind this trend is more awareness of dietary diversity and its impact on overall health. Health-conscious consumers recognise the importance of incorporating a wide range of grains, pulses and oilseeds into their diets to ensure they receive various nutrients. This has enhanced demand for lesser-known varieties like amaranth, teff, quinoa, millet and chia seeds, which offer unique nutritional profiles and can complement traditional staples like wheat and rice.

This trend is also influencing product labelling and marketing strategies within the industry. Manufacturers are increasingly highlighting their products' nutritional content and health benefits, catering to the sophisticated tastes of health-conscious consumers. Labels boasting claims like 'high in fibre', 'rich in antioxidants' and 'source of essential fatty acids' are becoming common, providing consumers with the information they need to make informed choices about their dietary selections.

Supermarkets have also added more grain and pulse products to their private-label assortments. Examples are Tesco's [quinoa](#) and [red split lentils](#), Albert Heijn's gluten-free [lentil pasta](#) and Jumbo's [three-colour organic quinoa mix](#). The development of private-label products is a good indication of the future potential and growth of these products in the mainstream food retail segment.

Figure 3: Alternative flours in the Free From section under private label in a Swiss supermarket



Source: [GloballyCool](#), August 2023

‘Free from’ has become a special product category

The ‘free from’ trend in the food industry refers to products marketed as [free from certain allergens, additives or ingredients](#) consumers perceive as potentially harmful or undesirable. This trend has gained popularity in recent years, driven by factors such as:

- Food allergies and sensitivities. An increasing number of people are being diagnosed with food allergies and sensitivities. Common allergens include gluten, dairy, soy and various grains. For individuals with allergies or sensitivities, ‘free from’ products offer safe alternatives. The EU specifies [14 food allergens](#) that must be specified on a product’s list of ingredients.
- Health and wellness concerns. More health-conscious consumers may choose products free from artificial additives and preservatives, unprocessed (raw) functional foods and ingredients, and/or products free from ingredients associated with health issues.
- Dietary restrictions and preferences. Some people follow specific diets, such as vegan, paleo, and [FODMAP](#). Reasons include ethical, environmental and health concerns. ‘Free from’ products cater to such dietary restrictions and preferences.
- Organic and ethically certified products. This is not exactly ‘free from’ in the traditional sense. However, consumers who buy certified organic and/or ethical products do so because they believe that such products are ‘free from’ harm (or at least less harmful) to their health, to the health of others, and to the environment.

For instance, soy is among the 14 allergens on the EU’s list. However, consumers may also avoid soy for other reasons, such as concerns over its phytoestrogen content or its potential for genetic modification.

Europe is a large and growing market for gluten-free products, as many Europeans have gluten-related disorders like celiac disease, wheat allergy, or non-celiac gluten sensitivity. The gluten-free market in Europe is relatively competitive. Some companies distribute across the region (such as [Schär](#) from Italy and [Organ](#) from Australia), but most companies produce mainly for their own domestic market. Popular gluten-free products include replacements for typical wheat-based foods like baked goods, pasta, breakfast cereals, snacks, and baking mixtures.

Gluten-free producers have strict requirements for the flour they buy – for certified products, the gluten content

must be below 20 parts per million. To produce gluten-free bakery products and mixes, companies usually experiment with different types of flour to get the right consistency and flavour, which is difficult to achieve with a single gluten-free flour. Grains like quinoa, amaranth, teff, fonio, sorghum and millet are gluten-free and can be used in gluten-free products. Pulses like chickpeas do not naturally contain gluten either. If their processing occurs in a gluten-free environment, derivatives like chickpea flour are also gluten-free.

Tips:

Check the potential of your product in the 'free from' market. To a certain extent, this market has specialised players, but it can be worth exploring. Consider visiting Europe's most important event in this niche market, [Free From Food & Ingredients](#).

Be careful when making nutritional and health claims if you sell to retail directly. These claims are subject to European regulations and the [EU register of health claims made on foods](#). For example, you are not allowed to claim weight loss properties of barley grain.

4. Local sourcing is increasingly popular

Recent trade disruptions, such as the COVID-19 pandemic and the war in Ukraine, have boosted the [interest in domestic produce](#). Some market experts believe that a way out of such situations may require structural changes, including shorter supply chains, a de-globalisation of food crops, and companies demanding higher levels of flexibility. Products will be increasingly sourced locally where possible. Otherwise, they will be sourced from other countries within Europe. This poses a threat to suppliers in developing countries.

Although Europe will continue to depend on imported crops to meet demand, buyers will remain very selective in choosing suppliers or shifting to new supplying countries. Besides the increasing demand for European production, buyers are also interested in new sources of high-quality beans or unique varieties. They are becoming less dependent on China and India.

The preference for local sourcing is relatively strong in Italy, Switzerland, France and Germany. This limits your opportunities in these markets. For example, Italian producers of special pasta products, such as protein pasta, buy their ingredients locally as much as possible. Only quinoa (Spain) and teff (Ethiopia) are imported. Of course, this also depends on local availability. Product origin is usually less important for traders in Eastern Europe. At the same time, these traders typically have a good assortment of local products thanks to the domestic production of several oilseeds and grain crops.

Tips:

Plan your production and supply carefully. Offer continuity through reliable, constant quality and volume, but do not produce without assessing the market. Visit the [Food Ingredients Europe](#) fair when specialising in sub-ingredients and natural additives. Check out the [exhibitor list](#) to see what types of ingredients are presented.

Check your export advantage in supplying the United Kingdom as a non-European supplier: look into the [British trade agreements with non-EU countries](#) and read the [summary of the United Kingdom's new relationship with the EU](#).

Check the [import tariff for your product in the United Kingdom](#) and the EU via [Access2Markets - My Trade Assistant](#).

5. Legislative requirements make Europe a challenging market

Legislative requirements make Europe a relatively challenging market compared to other regions, such as the Middle East, large parts of Asia, and even the United States of America. For example, the EU's [maximum residue levels](#) (MRLs) for certain pesticides on grains, pulses or oilseeds are among the strictest in the world. If your product contains higher MRLs than allowed, it cannot be sold on the European market. In addition, the EU is currently developing and updating a lot of sustainability-related legislation.

The European Green Deal

The [European Green Deal](#) will influence how resources are used and greenhouse gas emissions are reduced. The goal of the new EU policies on sustainability is to make Europe the first climate-neutral continent by 2050. Some of the most relevant parts for the grains, pulses and oilseeds industry are the [Farm to Fork Strategy](#) and the aforementioned [CAP](#), which aims to reduce the dependency on plant protein imports from outside the EU. Combined with suppliers' general increased preference for local sourcing, this poses a further threat to suppliers in developing countries.

The Farm to Fork Strategy aims to make food systems fair, healthy and environmentally friendly. It ensures sustainable food production and the [sustainable use of pesticides](#), packaging and food waste. With its [organic farming action plan](#), the European Commission has set a target of "at least 25% of the EU's agricultural land under organic farming and a significant increase in organic aquaculture by 2030". Policies can promote organic production within Europe, but increasing consumption will offer opportunities for non-European suppliers.

Another key aspect of the Green Deal is the new [Corporate Sustainability Due Diligence Directive](#) (CSDDD, 2024/1760), which entered into force in July of 2024. This directive aims to further sustainable and responsible corporate behaviour in companies' operations and global value chains. The CSDDD also makes it mandatory for large companies to identify and address any adverse human rights and environmental impacts resulting from their actions inside and outside of Europe.

The Green Deal will undoubtedly impact international food trade. Several EU trade agreements already include rules on trade and sustainable development. These include most agreements with Latin American countries and those with Moldova, Ukraine, and Vietnam.

These policies prioritise self-sufficiency and sustainable production. This could lead to fewer imports from developing countries, but, for the foreseeable future, Europe will remain dependent on imports of various grains, pulses, and oilseeds from developing countries. Suppliers of grains, pulses, and oilseeds to the European market should focus on adopting sustainable production practices to align with EU trade policies. Companies that refuse will not be able to remain competitive in a market increasingly focused on sustainability.

Deforestation Regulation for palm oil and soybean products

With its new [Deforestation Regulation](#) (EU 2023/1115), the EU wants to ensure that European consumption does not contribute to deforestation or forest degradation anywhere in the world. This regulation applies to specific product categories, including palm oil and soybean products.

As a small and medium-sized enterprise (SME) from a developing country, you most likely do not export these products. In that case, the regulation currently does not apply to you directly. However, palm oil and soybean products may compete with your products. In practice, there is a small chance that small and medium-sized exporters of oilseeds will be affected by this regulation. In addition, the regulation may be extended to include other forest-based product categories in the future.

The deforestation regulation includes:

- Due diligence statements—exporters are only allowed to supply palm oil and soybean products that are deforestation-free and legal. You need to cover all exports with a due diligence statement.
- Traceability – crops must be traceable to the plot or plots of land on which they were produced.
- A deforestation cut-off date – products from land that was deforested or degraded after 31 December 2020 cannot be sold in the EU. Agroforestry is not an alternative.
- A benchmarking system – the Commission is developing a system that assigns risks to countries and regions. The risk level determines what you need to do.

The new regulation entered into force in June of 2023, and companies were given 18-24 months to meet the requirements outlined in it. However, the Commission has [proposed giving concerned parties additional time to prepare](#). If approved, this would make the law applicable on 30 December 2025 for large and medium companies and on 30 June 2026 for [micro and small enterprises](#).

Tips:

Stay ahead of the curve and learn about the possible impacts of the Green Deal on imports from non-EU countries from our study '[EU Green Deal: how will it impact my business?](#)'. Also, read more about this topic in our news article on [pulses and oilseeds in the European protein transition](#).

Implement an environmental policy using the [Global Social Compliance Programme's Environmental Implementation Guidelines](#) and the [Consumer Goods Forum \(CGF\)](#).

If the Deforestation Regulation applies to you, then make sure you comply with it and support farmers in doing so as well. Farmers and cooperatives need to invest in mapping and traceability. Provide training and finances and work with other stakeholders.

Read our study on [buyer requirements for grains, pulses and oilseeds](#) to see what actions you can take and what type of evidence and certifications buyers require.

6. Sustainability and social compliance have become standard practice

Social responsibility and environmental sustainability are major European concerns for agricultural production and the wider agri-food sector. New Green Deal legislation and stricter MRLs have made these requirements non-negotiable in the grains, pulses and oilseeds sector, putting pressure on producers and suppliers. Companies throughout the value chain are working towards sustainable products and transparent supply chains. This relates to many aspects, including working conditions, water use and waste management.

European buyers are increasingly paying attention to their corporate responsibilities regarding their businesses' social and environmental impact. This is why import businesses expect producers and exporters to demonstrate more proof of their current good conduct and improvement plans.

Leading traders, food brands, and retailers are increasingly leading sustainability initiatives. Some have implemented their policies, like the Louis Dreyfus Company's [Sustainable Soy Policy](#). Others use available standards, such as the Italian gluten-free pasta producer [Andriani](#), which is [B Corp](#) certified. Figure 4 shows a print screen of a paragraph of an annual sustainability management report, a key requirement for B Corp certification. Other companies participate in sector initiatives, like the [Sustainable Rice Platform \(SRP\)](#).

Figure 4: Example of an annual update on ethical and responsible procurement in the annual sustainability management report

Ethical and responsible procurement

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Also in 2023, [redacted] was part of the SEDEX platform for monitoring social and ethical KPIs for conducting SMETA audits, scheduled for 2024.

Concerning supply chain involvement, 25% of the total 48 food raw materials and packaging suppliers adopted the tool in 2023, which is an increase compared to 2022.

The policy requiring SEDEX membership remains in two cases:

- suppliers operating in countries with a high ethical and social risk;
- explicit requests from customers.

Source: [GloballyCool](#), September 2024

South America's [Mayorga Coffee](#) is very clear about its sustainability practices. Their passionate sustainability story is prominently featured on their website. In addition to coffee, they also buy and sell [quinoa](#) and chia seeds.

Figure 5: Sustainable quinoa

Source: [Mayorga Coffee YouTube](#)

Many smaller buyers of grains, pulses and oilseeds have also incorporated social and environmental

requirements into their sourcing policies. They may ask you to have a code of conduct declaring that you run a responsible business in terms of local environmental and labour laws as a bottom line and strive for higher environmental and social standards. You can expect increasing pressure to show additional documentation and certification to prove your good conduct.

You can benefit from the demanding market by making sustainability a competitive advantage and standing out from other suppliers. However, basic purchase criteria such as price, on-time delivery and product quality are still most important. As a producer or exporter, you must remain price-competitive while complying with increasingly high standards.

Increasing demand for organic products

The growing interest in sustainability and healthy lifestyles is also boosting demand for organic food. [The EU's per capita spending on organic food reached €102 per person in 2022](#) – up to about €400 in Switzerland and Denmark. [Organic retail sales value in the EU more than quadrupled between 2004 and 2022](#), with particularly strong growth from about 2014 to 2020. It peaked at €4.6 billion in 2021 before dropping by 3.4% in 2022. This likely reflects a decline in consumer demand due to the [cost-of-living crisis](#) and rising food prices.

Inflation poses a threat to high-value products

In recent years, prices have increased throughout the supply chain due to factors such as the COVID-19 pandemic, the war in Ukraine, high energy prices and labour shortages. This [high inflation has changed European consumers' purchasing habits](#), leading them to bargain hunt, shift to lower-quality product varieties, and buy less. They are spending less on food and more on other categories like recreation and travel.

This was reflected in the European organic food market, particularly in the first half of 2023. Demand has dropped as consumers opt for less expensive 'regular' products. When consumers do buy organic, they search for cheaper alternatives. For example, in Germany, the sales of organic foods increased in discount retailers but decreased in specialised organic shops. This behaviour might reduce the margins of the organic food category.

Although [the inflation of food products declined in the EU in 2024](#), reaching 2.3% in July, consumer price levels of food products are still very high. In response, retailers will maintain pressure on prices and, as a result, profit margins. Supply chains must become even more efficient by cutting costs and innovating. Producers must implement technological improvements, and exporters must ensure efficient logistics and sustainable, clean and certified production.

The performance of [EU imports of organic grains, pulses and oilseeds](#) varied considerably per category in 2022 and 2023. After several years of overall growth, organic imports declined in 2023 due to high inflation that year. While organic rice imports, mainly from Pakistan and Cambodia, still grew by 7.5% in 2022, they went down by 4.1% in 2023.

Table 1: EU imports of various organic grains, pulses and oilseeds in thousand tonnes

	2021	2022	2023
Oil cakes	209	223	176
Soybeans	127	192	158
Cereals other than wheat and rice	113	121	105

Rice	87	93	89
Oilseeds other than soybeans	145	93	83
Wheat	50	32	53
Flours and other products of the milling industry	22	15	11

Source: [Analytical Brief N°2: EU imports of organic agri-food products](#) (July 2024)

The Netherlands and Germany are the EU's leading importers of organic agri-food products, accounting for more than half of the European import volume. As a key trade hub, the Netherlands re-exports significant imports to other EU countries. Germany's organic imports declined in 2022 (-13%) and 2023 (-7%), while Dutch imports still increased in 2022 (+4.6%) before dropping by 20% in 2023.

Ecuador's [CUSI](#) is a Certified [B Corporation](#), leading in 'the global movement for an inclusive, equitable, and regenerative economy'. CUSI develops, produces and markets healthy baking products of plant origin. These include (pan)cake and flatbread mixes, flours, ready-to-eat crackers, protein muesli and tortillas. Their products are certified organic, minimally processed, convenient, and many are gluten-free. CUSI's main ingredient is quinoa, which is native to Ecuador. They buy raw materials directly from local farmers at a fair price and add value through innovation.

The European organic market offers several opportunities for suppliers from developing countries. For example, teff is native to Ethiopia, Somalia, Eritrea and Djibouti, but most of these countries' production is not certified organic. This means some European importers have to buy their organic teff from other countries, like Spain, even if they prefer to source from the native countries.

Media exposure influences the market

Media exposure can make certain products popular, but it can also highlight environmental and social responsibility concerns. For example, when prices and exports of quinoa increased rapidly, [concerns were raised about food security in Bolivia](#). Likewise, with the growth of soy-based vegetarian products, consumer awareness grew about [soybean-driven deforestation](#) in South America. The same happened with palm oil and the growing concerns about the [poor labour conditions](#) in the palm oil industry.

Whether scientifically proven or not, negative publicity may affect the demand for a specific ingredient and the reputation of a brand or product origin.

Tips:

Find out more about social and environmental sustainability good practices in our [tips on how to become socially responsible](#) and [tips on how to go green](#).

Read our study on [buyer requirements for grains, pulses and oilseeds](#) for relevant sustainability certification that can verify your claims. Use the [ITC Standards Map](#) to learn about the different standards. Read our study on [social certifications](#) for trends and developments, including case studies.

Check your company's performance and implement the [amfori BSCI code of conduct](#). You can also find many practical tools in the [amfori BSCI resources](#).

Read our study on [the demand for grains, pulses and oilseeds in the European market](#) for a general outlook and organic market specifics.

Study the [European guidelines for organic products](#) and check [The World of Organic Agriculture](#) yearbooks for key data and developments in organic agriculture.

7. The search for authenticity creates a market for new flavours and traditional ingredients

This trend reflects a growing consumer preference for traditional ingredients and unique flavours in their food choices. This shift in consumer demand is prompting producers to explore and reintroduce forgotten or underutilised grains, pulses and oilseeds.

A driving force is consumers' [renewed interest in heritage and traditional foods](#). They are increasingly seeking out products that connect them to their cultural and culinary roots, searching for flavours that evoke a sense of nostalgia or cultural identity. Exposure to foreign cuisines through international travel and tourism further boosts the rise in demand for ethnic foods and dishes.

British supermarket [Tesco](#) follows the trend of cooking adventurous global meals at home. Its customers increasingly prepare international dishes and explore flavours from around the world. Sales of ingredients and meal kits for various global cuisines have been consistently rising. Ingredients to make familiar favourites like Indian curry are the most popular, increasing by 33%. Catering to this need, Tesco has expanded its range of 'World Foods' by 35%. It inspires customers with in-aisle displays showcasing Middle Eastern, Latin American, Japanese, Korean, and Caribbean dishes.

This trend has also boosted the use of [ancient grains](#) like [quinoa](#), [teff](#), [fonio](#) and Khorasan wheat, and heirloom varieties of pulses and oilseeds. These ingredients increasingly find their way into mainstream consumer consciousness, driving the demand.

Figure 6: Teff products sold in the European market



Source: Tobia Teff

An ancient grain gaining popularity through a strong branding strategy is Khorasan wheat, which is sold under the trademark [Kamut](#). It has excellent traceability and storytelling.

The search for authenticity also encourages innovation in the grains, pulses and oilseeds sector. Producers invest in research and development to discover new and exciting flavour profiles within existing crops. This has led to the emergence of unique varieties of quinoa with distinct nutty undertones and pulses with richer, more complex tastes. Additionally, producers are exploring traditional processing methods and techniques to preserve the integrity of these ingredients, resulting in products that boast a truly authentic culinary experience.

Also fitting with this trend are authentic or ethnic food products such as couscous (milled durum), risotto (arborio [rice](#)), dal (bean paste), hummus ([chickpea](#) paste), tahini ([sesame](#) paste) and sunflower seeds. These products have earned a position on European supermarket shelves in the past decade.

This trend is creating opportunities for small-scale and local producers. Consumers increasingly value transparency and traceability in their food sources and are willing to pay a premium for products with a good story. As a result, small-scale farmers and artisanal producers who specialise in traditional and heirloom varieties have more opportunities in the European market.

The ethnic retail segment has grown sharply

The ethnic retail trend in the food industry refers to the growing number of speciality stores that cater to

specific cultural or ethnic communities. These stores offer many products that are not always available in mainstream supermarkets. Ethnic retail outlets are typically started by the diaspora in Europe and are found in large and medium-sized cities, often with a high concentration in certain areas. In recent years, such outlets have also appeared in smaller cities.

Selling products through ethnic retail outlets can be interesting for you if:

- you supply consumer products for your local market, and your product and brand have a strong reputation in your country.
- your country has a certain diaspora size in Europe or elsewhere, meaning there is probably a good market in Europe or other countries.

If both conditions apply, it makes sense to approach specialised distributors supplying this market. Be prepared: your product, including the package and label, must meet the [legal requirements of the EU market](#).

Tips:

Use the heritage of your product, its traditional consumption, its unique characteristics, and the identity of its farmers to brand an authentic product in your marketing communications. A good first step in your branding strategy is a well-designed website.

Study examples of products that have successfully tapped into this authenticity trend. Besides the examples mentioned above, you can also look at the Italian company [Obà](#). In 2019, the company received [approval](#) from the [European Food Safety Authority](#) (EFSA) to commercialise fonio grains as a food ingredient.

Check the [EU Novel Food Catalogue](#) for restrictions to marketing your specific product. If your ingredient has not been marketed in Europe, it may be a novel food.

Visit the [Anuga Trade Fair](#) to gauge the interest of ethnic food distributors in Europe, such as [Asia Express Foods](#) and [Unidex](#). These distributors will also be able to give you an idea of how to adapt your product, package and label.

Explore the European diaspora for your country via [Eurostat](#) to estimate whether there could be an interesting ethnic market for your product.

8. Convenience drives the market for value-added products

European consumers are looking for time-saving solutions in meal preparation. With hectic schedules and an increasing focus on their work-life balance, European consumers need convenient options that reduce the time and effort required to cook nutritious, tasty meals. This has led to an increased demand for value-added products that are pre-packaged and/or ready to eat. Examples of convenience products that include grains, pulses and oilseeds are [pre-cooked quinoa pouches](#) and [ready-to-eat pulse-based snacks](#).

The convenience-driven trend also inspires innovation in processing and packaging technologies. Producers are investing in advanced techniques to extend the shelf life of value-added products without using artificial preservatives or additives. This has led to the development of modified atmosphere packaging and vacuum-sealed containers that maintain the freshness and nutritional integrity of the ingredients.

Suppliers of grains, pulses, and oilseeds are teaming up with manufacturers of value-added products to create

offerings for the convenience market. This collaborative approach is leading to the development of an array of innovative products, from grain-based meal kits to pulse-based protein bars.

Opportunity: added value from developing countries

European food processors have traditionally produced added-value products from food ingredients sourced in developing countries. Value addition in developing countries is often limited to basic processing, including cleaning, milling, crushing and popping. However, producing added-value products for the European market could offer you opportunities. Selling your added-value products is not easy, but it can be done. You can target specialised distributors that are open to engaging in such ventures.

For example, the British company [Aduna](#) has been successfully marketing traditional African ingredients, such as baobab and moringa. Recently, they started selling fonio grains, which they source from women farmers in Southern Mali. Their ambition is to process and pack as much as possible in the countries of origin.

Bolivian company [Coronilla](#) has introduced pasta made with local Bolivian quinoa and amaranth in Germany, the United Kingdom and Spain.

Higher tariffs for added-value grains

Consider that the EU has relatively high tariffs for products like added-value grains. This might reduce their competitiveness. The tariff applied depends on the specific product and the country of origin. For example, if your country has a free trade agreement with the EU, your product might enter the EU without tariffs. The EU also has several preferential schemes that might lower the applied tariff, such as the [Everything But Arms \(EBA\)](#) scheme, the [Generalised Scheme of Preferences \(SGP\)](#) and the [Generalised Scheme of Preferences Plus \(SGP+\)](#).

For added-value grain imports, for example, India is a beneficiary of the SGP and Bolivia of SGP+, so some of these countries' products are eligible for a reduced tariff. Peruvian products have a zero tariff thanks to Peru's free trade agreement with the EU. Ethiopia and Guinea benefit from the EBA scheme, so their products also enter the EU with a zero tariff.

Table 2: Tariffs for speciality grains with added value from selected origins

HS code	Description	General Tariff	India	Bolivia	Peru	Ethiopia	Guinea
1102.90.90	Cereal flours (excluding wheat, meslin, rice, rye, maize, barley and oat flour)	98.00 EUR / 1000 kg	98.00 EUR / 1000 kg	98.00 EUR / 1000 kg	0	0	0

1104.19.99	Cereal grains rolled or flaked, other than oats, barley, wheat, rice, and maize	173.00 EUR / 1000 kg	173.00 EUR / 1000 kg	173.00 EUR / 1000 kg	0	0	0
1904.10.90	Food preparations achieved by the swelling or roasting of cereals or cereal products	5.10% + 33.60 EUR / 100 kg	1.60% + 33.60 EUR / 100 kg	0% + 33.60 EUR / 100 kg	0	0	0
1904.20.99	Food preparations achieved with unroasted cereal flakes or mixtures of unroasted cereal flakes and roasted cereal flakes or swelled cereals, other than muesli, not obtained from rice or maize	5.10% + 33.60 EUR / 100 kg	1.60% + 33.60 EUR / 100 kg	0% + 33.60 EUR / 100 kg	0	0	0

1904.90.80	Food preparations including cereal or cereal products (excluding maize), in grain form, pre-cooked or otherwise prepared, other than rice and bulgur	8.30% + 25.70 EUR / 100 kg	4.80% + 25.70 EUR / 100 kg	0% + 25.70 EUR / 100 kg	0	0	0
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Source: [GloballyCool](#) based on [Access2Markets](#)

Tips:

Visit European trade fairs like [SIAL](#), [Anuga](#), or [Biofach](#) to find food brand companies that use grains, pulses, and oilseeds and to explore the advantages of adding value at the origin.

Stay on top of product innovations in the food sector, for example via [Food Ingredients First](#), [FoodNavigator](#) and [New Food](#).

When marketing a finished product, target distributors specialised in fair trade, organic, ethnic or health products. Read our [tips on how to find buyers](#) for your product.

When introducing a final product in Europe, be prepared to invest in international marketing activities and logistics, such as participating in trade fairs and warehousing. Also, adjust your product presentation to the European style. Get inspiration from existing and successful brands you like.

Check your product's tariff for your country of origin in [Access2Markets](#) to help determine if you are competitive in terms of price.

9. E-commerce will gain market share

The online grocery channel is developing fast in Europe. The COVID-19 pandemic gave online grocery shopping an extra push. Even though the fast growth of online grocery shopping has slowed since the sharp growth during the pandemic, online shopping is still expected to keep growing steadily. Online grocery sales in Europe are expected to increase annually between 8-12% between 2023 and 2027. This growth is the result of more people using smartphones, better online shopping technologies, and a higher demand for subscription services and fast delivery options. Online food shopping is common in the Netherlands, the United Kingdom, Denmark and Sweden.

To cater to this need, many other online concepts have popped up, such as:

- Fully online grocery stores like [Picnic](#) and [Crisp](#) (Netherlands), [Ocado](#) (United Kingdom) and [Rohlik](#) (Czechia).
- Delivery of meal boxes with ingredients and recipes, like [HelloFresh](#) and [Gousto](#).
- International online giants like [Amazon Fresh](#), which recently launched in the United Kingdom, Germany, Spain and Italy and has closed partnerships with [Morrisons](#), [Unes](#) and [Monoprix](#).
- Food delivery platforms like [Just Eat Takeaway.com](#), [Deliveroo](#) and [Uber Eats](#), which provide delivery as a service.

In addition, mainstream grocery retailers like [Sainsbury's](#) in the United Kingdom and [Albert Heijn](#) in the Netherlands sell their products online and in-store. Several European countries also have specialised web shops that sell healthy food ingredients, including grains, pulses and oilseeds, like [De Notenshop](#) (Netherlands) and [Bulk.com](#).

Tips:

Explore opportunities to supply the online health ingredients supermarkets directly with your grains, pulses or oilseeds. Your best option is to search for companies online within a certain national domain (like: ".nl" for the Netherlands) and relevant keywords (preferably in the specific country's language).

Read our [tips on how to go digital](#) to learn about digitalisation in this sector, including e-commerce.

[Globally Cool](#) carried out this study on behalf of CBI.

Please review our [market information disclaimer](#).