

PULSES

MARKET UPDATE OCTOBER 2025

The 2025 pulse market is defined by strong global supply growth and softening raw material prices. Chickpeas, pinto, and black beans have all seen significant production recoveries, while red kidney beans remain broadly stable. For UK buyers, this means improved availability and cost stability for raw materials, though further-processed products such as canned or pouched pulses continue to face upward cost pressure due to localised production factors.

Canada

- Chickpea output for 2024/25 rose by around 105% versus 2023, far above the five-year average.
- Production gains were strongest in Saskatchewan (+108%), driven by expanded acreage and excellent yields.
- Pinto and black bean crops also saw major increases, contributing to a domestic oversupply and easing global price levels.

Turkey

- Chickpea production increased modestly (~5%), and kidney beans reached ~1,300 metric tonnes, a slight gain year-on-year.
- Reduced competition from Russia has supported Turkey's export potential, though EU tariffs continue to cap competitiveness.

Argentina

- Argentina has become a key disruptor in the European chickpea market.
- The 2024/25 harvest expanded by 66% overall, including a 24% improvement in yields.
- Strong calibres and highly competitive pricing have helped Argentina win tenders across Europe, reinforcing its role as a cost-effective origin for bulk buyers.

Market Dynamics

- **Supply Growth:** Substantial increases in acreage and yields across Canada and Argentina have led to a global oversupply of pulses.
- **Price Trend:** Raw material prices are easing due to expanded availability and greater competition among exporters.
- **Competition:** New and returning origins are adding to the supply base, increasing competitive pressure and widening sourcing options for buyers.
- **Freight & Currency:** Shipping costs and some favourable exchange rates are improving landed costs for UK importers from key producing regions.

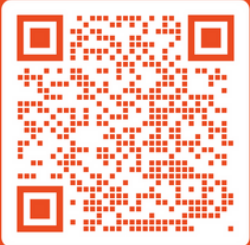
Raw Material vs. Processed Product Costs

While raw pulse materials are now more competitively priced, further-processed products (such as canned or pouched pulses) continue to be influenced by:

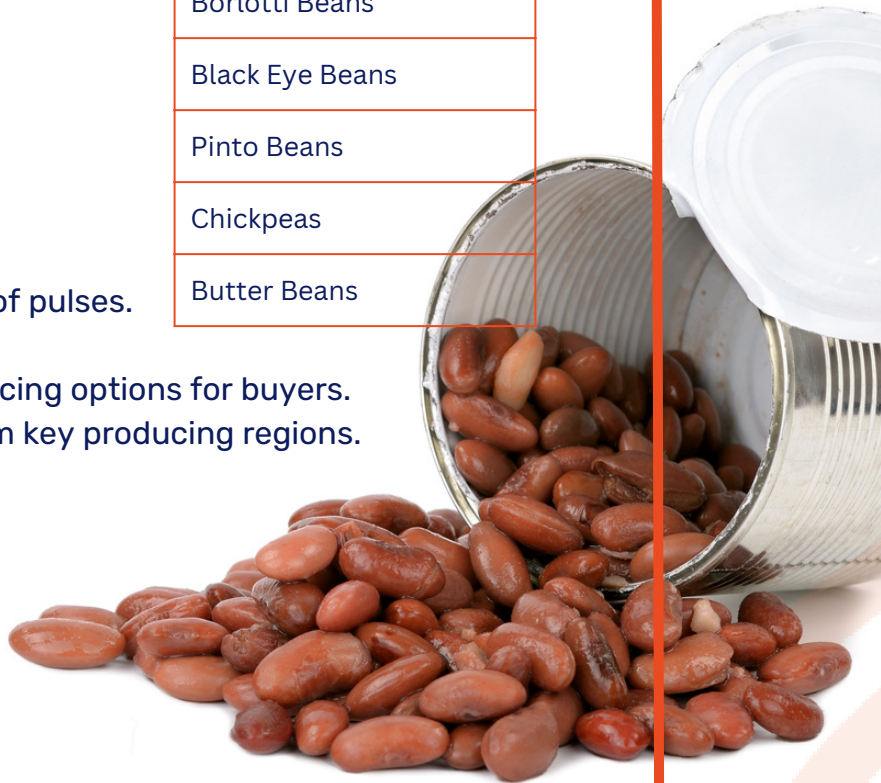
- Energy costs, particularly in high-energy-use manufacturing regions.
- Labour rates, which vary sharply by country of origin.
- Logistics and packaging costs, which have not fallen in line with raw material trends.

For the remainder of 2025 and into early 2026, raw material availability is ample and price pressure remains on the downside. However, buyers sourcing processed or semi-prepared pulses should anticipate cost differentials depending on production origin and value-added inputs. Strategic sourcing, balancing origin, form, and processing location, will remain key to managing total landed cost.

Products
Red Kidney Beans
Black Beans
White Haricot Beans
Cannellini Beans
Borlotti Beans
Black Eye Beans
Pinto Beans
Chickpeas
Butter Beans



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