

# **Pulse Flours Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Pea, Bean, Chickpea, Lentil), By Application (Feed, Food (Extruded Food, Beverages, Meat Products and Others) and Others), By Region & Competition, 2021-2031F**

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## **Abstracts**

The Global market for pulse flours is anticipated to expand from USD 44.13 billion in 2025 to USD 65.82 billion by 2031, experiencing a compound annual growth rate of 6.89%. Derived from the dried edible seeds of legumes like chickpeas, lentils, and peas, these powdered products are recognized for being naturally gluten-free and rich in both fiber and protein. Market growth is heavily fueled by rising health awareness among consumers, which increases the desire for nutritious, gluten-free, and plant-based dietary options. The expanding popularity of flexitarian and vegan lifestyles, coupled with wider use in the snack and bakery sectors, provides additional momentum. Emphasizing robust supply chain activity in major producing areas, Statistics Canada reported that in 2025, the nation's lentil yield hit a record 3.4 million tonnes, alongside a chickpea harvest of 481,589 tonnes.

Despite this positive trajectory, the market encounters a major hurdle in the form of volatile raw pulse prices. This unpredictability, frequently driven by shifting weather patterns and intricate supply chain operations, can negatively impact both product availability and overall manufacturing expenses.

## **Market Driver**

The Global pulse flours industry is heavily propelled by a growing emphasis on health

and wellness among consumers. Contemporary dietary habits place a premium on ingredients that deliver exceptional nutritional benefits, particularly those naturally free of gluten and high in fiber and protein. This transformation is reflected in shoppers prioritizing foods that support preventive healthcare and overall well-being. A May 2025 report from FMI - The Food Industry Association, titled 'U.S. Grocery Shopper Trends 2025,' revealed that 77% of consumers try to make healthier eating decisions, underscoring a widespread preference for nutritious items. By directly fulfilling these criteria, pulse flours are increasingly utilized in plant-based substitutes and health-focused food creations.

The industry is additionally energized by ongoing product innovation and the adaptable nature of these flours in culinary settings, which expands their potential uses. Improvements in formulation and processing have upgraded the functional and sensory qualities of pulse ingredients, allowing them to be incorporated into a broader spectrum of goods, such as innovative meat alternatives, snacks, and baked products. Highlighting this trend, Protein Industries Canada announced a \$3.9 million investment in April 2026 for a collaborative initiative with Sweet Nutrition and AGT Foods aimed at advancing next-generation pulse ingredients and boosting manufacturing capabilities. Furthermore, broader market vitality and government backing are evident; as noted by USA Pulses and the GPC, the U.S. Department of Agriculture committed \$75 million in February 2026 to procure dry peas, chickpeas, lentils, and dry beans, reflecting strong demand across the sector.

## **Market Challenge**

Unstable pricing for raw pulse commodities poses a major obstacle to the expansion of the global pulse flours market. Often triggered by complicated supply chain issues and erratic weather that damages crop yields, this volatility leads to higher manufacturing expenses. Fluctuating costs for raw inputs create difficulties for businesses attempting to manage steady production budgets and establish reliable price points for their finished flour goods. Consequently, this financial unpredictability can discourage large-scale commercial buyers in the snack and bakery industries, as they depend on economically viable and consistent ingredient supplies.

In addition to inflating costs, these pricing variations disrupt overall market equilibrium and the steady availability of products. Faced with unpredictable raw material expenses, producers might have to scale back manufacturing or transfer the added costs to end-users, which can hinder broader market adoption and growth. Illustrating this vulnerability, the International Grains Council reported that global trade in pulses

declined by 6% year-over-year in 2025, dropping to roughly 21.0 million tonnes. Spurred by reduced purchasing in critical markets, this decline in trade volume emphasizes how sensitive the industry is to shifts in supply and demand, which ultimately compromises pricing stability and raw material accessibility for flour manufacturers.

## **Market Trends**

The Global pulse flours market is heavily influenced by a rising preference for transparent sourcing and clean-label products, driven by consumers wanting minimally processed items with clear ingredient origins. This movement highlights a broader consumer appetite for nutritious, natural foods, encouraging producers to focus on sustainable and easily traceable pulse supplies. Because pulse flours are naturally free of artificial additives, they perfectly align with shopper demands for wholesome ingredients. Reflecting this shift, the World of Organic Agriculture noted in 2025 that the organic pulse flour sector is expected to achieve a robust 10.39% compound annual growth rate through 2031, propelled largely by sustainable purchasing strategies that underscore a strong desire for ethically sourced goods.

Another critical trend is the formation of strategic alliances and industry partnerships, which help broaden market presence and encourage product innovation. These collaborative ventures allow trade associations and businesses to share research and development resources, improve processing techniques, and explore entirely new product applications. By joining forces, companies can more effectively navigate technical challenges and speed up the market introduction of innovative pulse flour goods. For example, as reported by the Red River Farm Network in January 2026, the Northharvest Bean Growers Association, which accounts for more than 60 percent of U.S. dry bean output, teamed up with USA Pulses to collaboratively boost the demand for pulse crops, demonstrating how cooperative initiatives are vital for sustaining supply and advancing the sector.

## **Key Market Players**

Ingredion Inc.

Archer?Daniels?Midland Company

AGT Food and Ingredients Inc.

The Scoular Company

Tate & Lyle PLC

Buhler Holding AG

Avena Foods Limited

Ardent Mills LLC

SunOpta Inc.

Batory Foods, Inc.

## Report Scope

In this report, the Global Pulse Flours Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

### Pulse Flours Market, By Type

Pea

Bean

Chickpea

Lentil

### Pulse Flours Market, By Application

Feed

Food

Others

### Pulse Flours Market, By Region

## North America

United States

Canada

Mexico

## Europe

France

United Kingdom

Italy

Germany

Spain

## Asia Pacific

China

India

Japan

Australia

South Korea

## South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

### **Competitive Landscape**

Company Profiles: Detailed analysis of the major companies present in the Global Pulse Flours Market.

### **Available Customizations:**

Global Pulse Flours Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

### **Company Information**

Detailed analysis and profiling of additional market players (up to five).

## Contents

### 1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
  - 1.2.1. Markets Covered
  - 1.2.2. Years Considered for Study
  - 1.2.3. Key Market Segmentations

### 2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

### 3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

### 4. VOICE OF CUSTOMER

### 5. GLOBAL PULSE FLOURS MARKET OUTLOOK

- 5.1. Market Size & Forecast
  - 5.1.1. By Value
- 5.2. Market Share & Forecast
  - 5.2.1. By Type (Pea, Bean, Chickpea, Lentil)
  - 5.2.2. By Application (Feed, Food (Extruded Food, Beverages, Meat Products, Others), Others)
  - 5.2.3. By Region

- 5.2.4. By Company (2025)
- 5.3. Market Map

## **6. NORTH AMERICA PULSE FLOURS MARKET OUTLOOK**

- 6.1. Market Size & Forecast
  - 6.1.1. By Value
- 6.2. Market Share & Forecast
  - 6.2.1. By Type
  - 6.2.2. By Application
  - 6.2.3. By Country
- 6.3. North America: Country Analysis
  - 6.3.1. United States Pulse Flours Market Outlook
    - 6.3.1.1. Market Size & Forecast
      - 6.3.1.1.1. By Value
    - 6.3.1.2. Market Share & Forecast
      - 6.3.1.2.1. By Type
      - 6.3.1.2.2. By Application
  - 6.3.2. Canada Pulse Flours Market Outlook
    - 6.3.2.1. Market Size & Forecast
      - 6.3.2.1.1. By Value
    - 6.3.2.2. Market Share & Forecast
      - 6.3.2.2.1. By Type
      - 6.3.2.2.2. By Application
  - 6.3.3. Mexico Pulse Flours Market Outlook
    - 6.3.3.1. Market Size & Forecast
      - 6.3.3.1.1. By Value
    - 6.3.3.2. Market Share & Forecast
      - 6.3.3.2.1. By Type
      - 6.3.3.2.2. By Application

## **7. EUROPE PULSE FLOURS MARKET OUTLOOK**

- 7.1. Market Size & Forecast
  - 7.1.1. By Value
- 7.2. Market Share & Forecast
  - 7.2.1. By Type
  - 7.2.2. By Application
  - 7.2.3. By Country

### 7.3. Europe: Country Analysis

#### 7.3.1. Germany Pulse Flours Market Outlook

##### 7.3.1.1. Market Size & Forecast

###### 7.3.1.1.1. By Value

##### 7.3.1.2. Market Share & Forecast

###### 7.3.1.2.1. By Type

###### 7.3.1.2.2. By Application

#### 7.3.2. France Pulse Flours Market Outlook

##### 7.3.2.1. Market Size & Forecast

###### 7.3.2.1.1. By Value

##### 7.3.2.2. Market Share & Forecast

###### 7.3.2.2.1. By Type

###### 7.3.2.2.2. By Application

#### 7.3.3. United Kingdom Pulse Flours Market Outlook

##### 7.3.3.1. Market Size & Forecast

###### 7.3.3.1.1. By Value

##### 7.3.3.2. Market Share & Forecast

###### 7.3.3.2.1. By Type

###### 7.3.3.2.2. By Application

#### 7.3.4. Italy Pulse Flours Market Outlook

##### 7.3.4.1. Market Size & Forecast

###### 7.3.4.1.1. By Value

##### 7.3.4.2. Market Share & Forecast

###### 7.3.4.2.1. By Type

###### 7.3.4.2.2. By Application

#### 7.3.5. Spain Pulse Flours Market Outlook

##### 7.3.5.1. Market Size & Forecast

###### 7.3.5.1.1. By Value

##### 7.3.5.2. Market Share & Forecast

###### 7.3.5.2.1. By Type

###### 7.3.5.2.2. By Application

## 8. ASIA PACIFIC PULSE FLOURS MARKET OUTLOOK

### 8.1. Market Size & Forecast

#### 8.1.1. By Value

### 8.2. Market Share & Forecast

#### 8.2.1. By Type

#### 8.2.2. By Application

### 8.2.3. By Country

## 8.3. Asia Pacific: Country Analysis

### 8.3.1. China Pulse Flours Market Outlook

#### 8.3.1.1. Market Size & Forecast

##### 8.3.1.1.1. By Value

#### 8.3.1.2. Market Share & Forecast

##### 8.3.1.2.1. By Type

##### 8.3.1.2.2. By Application

### 8.3.2. India Pulse Flours Market Outlook

#### 8.3.2.1. Market Size & Forecast

##### 8.3.2.1.1. By Value

#### 8.3.2.2. Market Share & Forecast

##### 8.3.2.2.1. By Type

##### 8.3.2.2.2. By Application

### 8.3.3. Japan Pulse Flours Market Outlook

#### 8.3.3.1. Market Size & Forecast

##### 8.3.3.1.1. By Value

#### 8.3.3.2. Market Share & Forecast

##### 8.3.3.2.1. By Type

##### 8.3.3.2.2. By Application

### 8.3.4. South Korea Pulse Flours Market Outlook

#### 8.3.4.1. Market Size & Forecast

##### 8.3.4.1.1. By Value

#### 8.3.4.2. Market Share & Forecast

##### 8.3.4.2.1. By Type

##### 8.3.4.2.2. By Application

### 8.3.5. Australia Pulse Flours Market Outlook

#### 8.3.5.1. Market Size & Forecast

##### 8.3.5.1.1. By Value

#### 8.3.5.2. Market Share & Forecast

##### 8.3.5.2.1. By Type

##### 8.3.5.2.2. By Application

## 9. MIDDLE EAST & AFRICA PULSE FLOURS MARKET OUTLOOK

### 9.1. Market Size & Forecast

#### 9.1.1. By Value

### 9.2. Market Share & Forecast

#### 9.2.1. By Type

- 9.2.2. By Application
- 9.2.3. By Country
- 9.3. Middle East & Africa: Country Analysis
  - 9.3.1. Saudi Arabia Pulse Flours Market Outlook
    - 9.3.1.1. Market Size & Forecast
      - 9.3.1.1.1. By Value
    - 9.3.1.2. Market Share & Forecast
      - 9.3.1.2.1. By Type
      - 9.3.1.2.2. By Application
  - 9.3.2. UAE Pulse Flours Market Outlook
    - 9.3.2.1. Market Size & Forecast
      - 9.3.2.1.1. By Value
    - 9.3.2.2. Market Share & Forecast
      - 9.3.2.2.1. By Type
      - 9.3.2.2.2. By Application
  - 9.3.3. South Africa Pulse Flours Market Outlook
    - 9.3.3.1. Market Size & Forecast
      - 9.3.3.1.1. By Value
    - 9.3.3.2. Market Share & Forecast
      - 9.3.3.2.1. By Type
      - 9.3.3.2.2. By Application

## **10. SOUTH AMERICA PULSE FLOURS MARKET OUTLOOK**

- 10.1. Market Size & Forecast
  - 10.1.1. By Value
- 10.2. Market Share & Forecast
  - 10.2.1. By Type
  - 10.2.2. By Application
  - 10.2.3. By Country
- 10.3. South America: Country Analysis
  - 10.3.1. Brazil Pulse Flours Market Outlook
    - 10.3.1.1. Market Size & Forecast
      - 10.3.1.1.1. By Value
    - 10.3.1.2. Market Share & Forecast
      - 10.3.1.2.1. By Type
      - 10.3.1.2.2. By Application
  - 10.3.2. Colombia Pulse Flours Market Outlook
    - 10.3.2.1. Market Size & Forecast

- 10.3.2.1.1. By Value
- 10.3.2.2. Market Share & Forecast
  - 10.3.2.2.1. By Type
  - 10.3.2.2.2. By Application
- 10.3.3. Argentina Pulse Flours Market Outlook
  - 10.3.3.1. Market Size & Forecast
    - 10.3.3.1.1. By Value
  - 10.3.3.2. Market Share & Forecast
    - 10.3.3.2.1. By Type
    - 10.3.3.2.2. By Application

## **11. MARKET DYNAMICS**

- 11.1. Drivers
- 11.2. Challenges

## **12. MARKET TRENDS & DEVELOPMENTS**

- 12.1. Merger & Acquisition (If Any)
- 12.2. Product Launches (If Any)
- 12.3. Recent Developments

## **13. GLOBAL PULSE FLOURS MARKET: SWOT ANALYSIS**

## **14. PORTER'S FIVE FORCES ANALYSIS**

- 14.1. Competition in the Industry
- 14.2. Potential of New Entrants
- 14.3. Power of Suppliers
- 14.4. Power of Customers
- 14.5. Threat of Substitute Products

## **15. COMPETITIVE LANDSCAPE**

- 15.1. Ingredion Inc.
  - 15.1.1. Business Overview
  - 15.1.2. Products & Services
  - 15.1.3. Recent Developments
  - 15.1.4. Key Personnel

- 15.1.5. SWOT Analysis
- 15.2. Archer?Daniels?Midland Company
- 15.3. AGT Food and Ingredients Inc.
- 15.4. The Scoular Company
- 15.5. Tate & Lyle PLC
- 15.6. Buhler Holding AG
- 15.7. Avena Foods Limited
- 15.8. Ardent Mills LLC
- 15.9. SunOpta Inc.
- 15.10. Batory Foods, Inc.

## **16. STRATEGIC RECOMMENDATIONS**

## **17. ABOUT US & DISCLAIMER**

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