



Global Chickpea Market

Market size, segmentation, competitive landscape and outlook

2021-2031

Moving forward, together



Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

ANDREY SHEVCHENKO, Managing Partner

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Indicator	Value
Market size (2025)	USD 16.2 bn
Forecast (2031)	USD 23.1 bn
CAGR (2021-2031)	6.1%
Study period	2021-2031
Largest region	Asia-Pacific · 73.2%
Fastest-growing region	North America · 7.4%
Market concentration	Low
Licence	Individual / Company

The global chickpea market reached USD XXX billion in 2025 and is forecast to expand to USD XXX billion by 2031, advancing at a XX% CAGR. Asia-Pacific accounted for XX% of market value, anchored by India's XXX-tonne 2024–25 harvest and its dominant consumption base. Trade flows are being reshaped by Australia's XXX-tonne crop, India's variable import regime, and rising demand for large-calibre kabuli chickpeas, flour, snacks and protein ingredients. The report quantifies production, consumption, trade, pricing, processing demand, distribution channels and competitive positioning across the global chickpea value chain.

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Executive summary

The global chickpea market reached USD XXX billion in 2025 and is forecast to expand to USD XXX billion by 2031, advancing at a XX% CAGR. Asia-Pacific accounted for XX% of market value, anchored by India's XXX-tonne 2024–25 harvest and its dominant consumption base. Trade flows are being reshaped by Australia's XXX-tonne crop, India's variable import regime, and rising demand for large-calibre kabuli chickpeas, flour, snacks and protein ingredients. The report quantifies production, consumption, trade, pricing, processing demand, distribution channels and competitive positioning across the global chickpea value chain.

Indicator	Value
Market size 2025	XXX
Forecast 2031	XXX
CAGR	XXX
Largest region	XXX
Fastest region	XXX

Key findings

- The global chickpea market generated USD XXX billion in 2025 and will reach USD XXX billion in 2031.
- Global commercially marketed chickpea volume reached XXX tonnes in 2025.
- FAOSTAT recorded XXX tonnes of world chickpea production in 2023, with India producing XXX tonnes.
- India's Ministry of Agriculture and Farmers' Welfare reported final 2024–25 chickpea production of XXX tonnes.
- The Australian Bureau of Statistics recorded XXX tonnes of chickpeas sold in 2024–25, up from XXX tonnes in 2023–24.
- Australian chickpea sales generated AUD XXX in 2024–25, compared with AUD XXX one year earlier.
- Desi chickpeas represented XX% of global market value in 2025, while higher-priced kabuli chickpeas accounted for XX%.
- Whole dry chickpeas remained the largest form at XX% of value, while processed and value-added chickpea ingredients posted the fastest forecast CAGR at XX%.

Market size and forecast

Market value by year, USD bn

Indicator	2026	2027	2028	2029	2030	2031	CAGR
Market value, USD bn	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Market volume	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Production	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Imports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Exports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Apparent consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Year-over-year value change

Indicator	2027	2028	2029	2030	2031	CAGR
Market value	X%	X%	X%	X%	X%	X%
Production	X%	X%	X%	X%	X%	X%
Imports	X%	X%	X%	X%	X%	X%
Exports	X%	X%	X%	X%	X%	X%

Source: XXX

Global Chickpea Market Trends and Growth Drivers

The chickpea market is governed by the interaction of a large, relatively stable food-demand base and a concentrated, weather-sensitive production system. India's crop determines the global balance in most seasons, while Australia, Turkey, Canada, the United States, Russia, Ethiopia and Argentina provide exportable surpluses and premium kabuli grades.

Value growth is outpacing volume growth as cleaned, graded and packaged products replace loose pulses and as chickpeas move into snacks, flour, pasta, bakery products and protein ingredients. This transition increases the importance of seed calibre, colour, hydration, flavour, milling performance, traceability and residue compliance.

Policy remains an active market variable. Import-duty changes, buffer releases, minimum support prices and stock controls alter trade flows, while destination-market residue and food-safety standards raise the value of integrated quality management.

Growth drivers

South Asian staple demand

Chickpea remains embedded in household diets through whole chana, split chana dal, besan and prepared foods. Population growth, urban food distribution and public procurement reinforce a large demand floor, while income growth shifts purchases toward graded and packaged products.

Plant-protein food formulation

Food manufacturers are using chickpea flour and protein in pasta, bakery, snacks, meat alternatives and dairy-free products because chickpea combines protein, fibre and a familiar consumer label. Demand benefits ingredient processors, kabuli suppliers and vertically integrated millers with dependable flavour and functionality specifications.

Premium snacking and convenience

Roasted chickpeas, pulse chips, ready-to-eat pouches and convenient canned formats widen consumption beyond traditional meals. The shift raises value per tonne and gives branded processors more pricing power than undifferentiated bulk-grain traders.

Cereal-rotation economics

Chickpeas contribute nitrogen fixation and provide a broadleaf break in cereal systems, supporting soil fertility and weed or disease management. These agronomic benefits encourage acreage in Australia, Canada and the United States when expected margins are competitive with wheat, canola and other pulses.

Formalization of packaged pulses

Modern retail, e-commerce and branded staples are moving volume from unorganized loose trade into cleaned, graded and traceable packs. Brand owners gain opportunities in calibrated grain size, convenience packaging and origin assurance, particularly in India and urban Middle Eastern markets.

Climate-smart genetics and mechanization

Wilt resistance, drought tolerance, shorter crop duration and upright plant architecture improve yield stability and mechanical harvestability. New varieties reduce field losses and make chickpea production more scalable in labour-constrained and moisture-stressed regions.

Restraints

Production and yield volatility

Rainfall timing, terminal heat, frost, Fusarium wilt and Ascochyta blight can materially alter output within a single season. Volatile crops transmit quickly into wholesale prices, processing utilization and trade demand because production is concentrated in a limited number of origins.

Trade-policy intervention

India uses import duties, temporary exemptions, buffer releases, procurement and stock controls to manage domestic pulse prices. Policy changes can redirect Australian, Canadian and Black Sea cargoes within weeks, increasing basis risk for exporters and importers.

Export-grade compliance costs

Premium buyers impose strict requirements for moisture, pesticide residues, foreign material, seed defects, colour and calibre. Cleaning losses, testing expenses and rejected or downgraded lots narrow margins for fragmented suppliers without integrated quality systems.

Substitution by other pulses

Lentils, peas and beans compete for cropping area, processing capacity and consumer spending. Pea protein also has a larger installed ingredient-processing base, slowing chickpea penetration where formulators prioritize price and functional standardization.

Chickpea Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
South Asian staple demand	XXX	XXX	XXX
Plant-protein food formulation	XXX	XXX	XXX
Premium snacking and convenience	XXX	XXX	XXX
Cereal-rotation economics	XXX	XXX	XXX
Formalization of packaged pulses	XXX	XXX	XXX
Climate-smart genetics and mechanization	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Production and yield volatility	XXX	XXX	XXX
Trade-policy intervention	XXX	XXX	XXX
Export-grade compliance costs	XXX	XXX	XXX
Substitution by other pulses	XXX	XXX	XXX

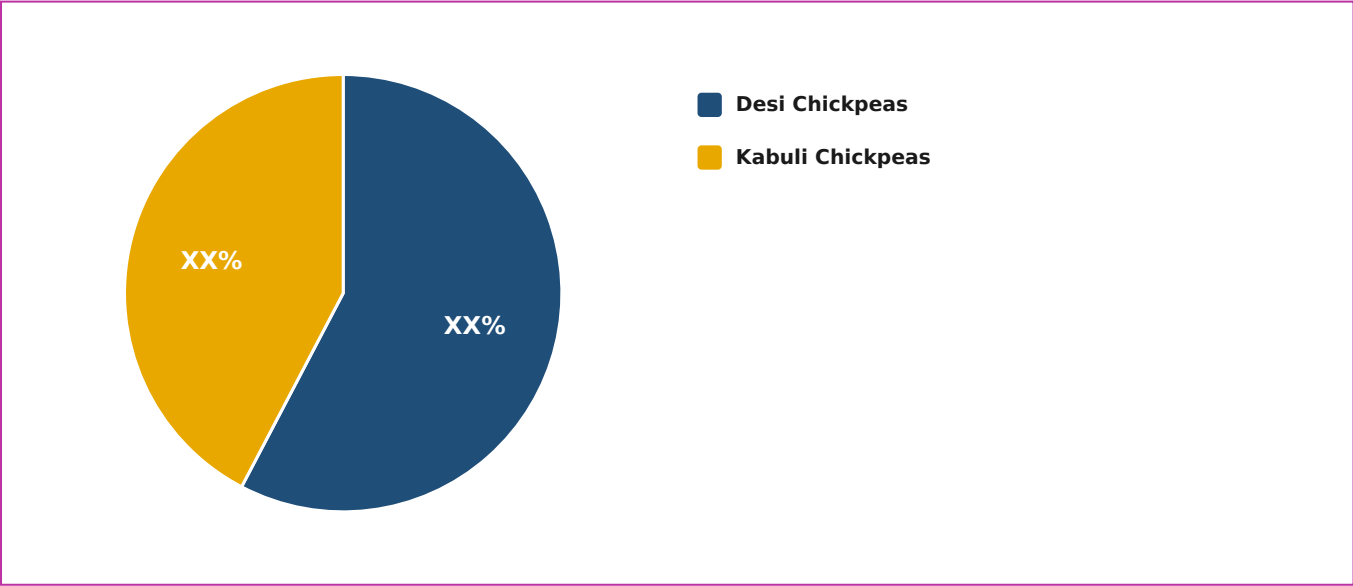
Source: XXX

Chickpea Market Segmentation by Type, Form, Application and Channel

By Product Type

Desi chickpeas dominate global tonnage because they underpin Indian household consumption, chana dal and besan production. Kabuli chickpeas hold a larger value share than their volume contribution because calibre, colour and uniformity command premiums. Kabuli growth is strongest in Mediterranean foods, canned products, hummus and export-oriented retail packs.

Value share by product Type, 2025



Source: XXX

Value by product Type, USD bn

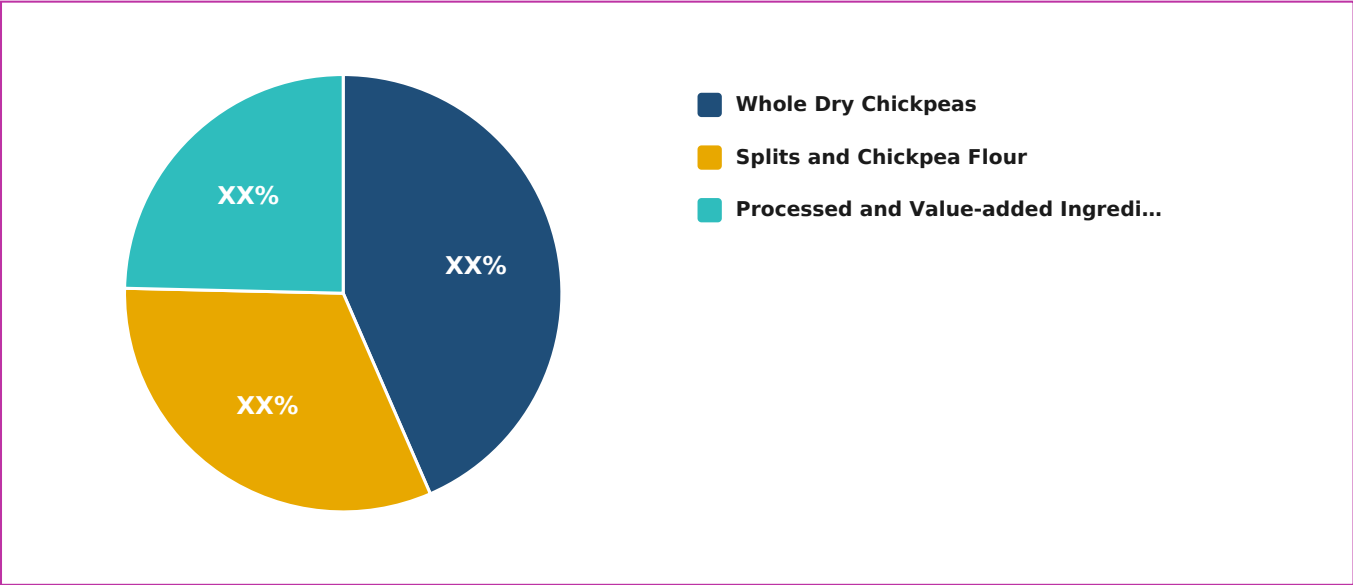
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Desi Chickpeas	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Kabuli Chickpeas	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Form

Whole dry grain remains the principal traded and consumed format because it feeds household, canning, foodservice and downstream milling channels. Chickpea flour benefits from gluten-free bakery, snack, batter and traditional besan applications. Protein concentrates, isolates, pre-cooked products and extruded ingredients form the smallest but fastest-growing segment.

Value share by form, 2025



Source: XXX

Value by form, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Whole Dry Chickpeas	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Splits and Chickpea Flour	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Processed and Value-added Ingredients	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Application

Household use leads through curries, salads, soups, dal and flour-based preparations, particularly in South Asia and the Middle East. Food processors are raising demand for canned chickpeas, hummus, snacks, pasta, bakery formulations and protein ingredients. Foodservice growth tracks restaurant penetration of Mediterranean, Indian and health-positioned cuisines.

Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Household and Traditional Culinary	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Food Processing	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Foodservice	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Animal Feed and Industrial	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Distribution Channel

Traditional wholesalers remain central to farm aggregation and loose-pulse distribution in India, Pakistan, Turkey, Ethiopia and other high-consumption markets. Modern grocery and branded retail are gaining share through graded quality, pack-size convenience and stronger food-safety assurance. Direct business-to-business supply is expanding as processors contract for specific varieties, calibre and functionality.

Value by distribution Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Traditional Wholesale and Open Markets	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Modern Retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Direct B2B and Ingredient Supply	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Foodservice Distribution	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Online Retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

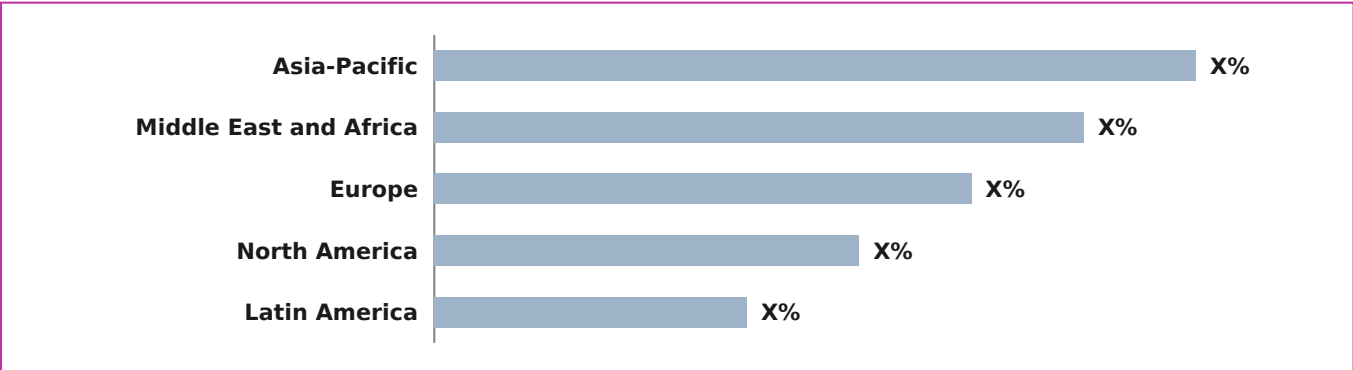
Chickpea Market Regional Analysis and Country Outlook

Asia-Pacific generated XX% of global chickpea market value in 2025, reflecting India's position as the largest producer, consumer and processor. India produced XXX tonnes in 2024–25 and supports demand through household consumption, chana dal milling, besan production, snacks and foodservice. Pakistan, Myanmar and Australia add meaningful production, while Australia's export-oriented industry provides a critical counter-seasonal source for Indian and South Asian buyers.

North America is forecast to record the fastest regional CAGR at XX% through 2031. Growth is led by hummus, roasted snacks, gluten-free bakery products, pulse pasta, canned chickpeas and emerging protein ingredients rather than staple consumption alone. Canada and the United States supply kabuli grades into domestic, European and Middle Eastern channels, with 2025–26 Canadian production reaching XXX tonnes.

The Middle East and Africa retain a substantial consumption base centred on hummus, falafel, stews and household pulse use. Turkey is simultaneously a producer, processor, exporter and re-export hub, while Ethiopia and East Africa present acreage and yield-improvement opportunities. Europe remains a premium import market for traceable kabuli chickpeas, organic products and prepared-food applications, whereas Latin American growth is led by Mexico, Argentina and Brazil.

Growth rate by region, 2025-2031



Source: XXX

Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Latin America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Market value by leading country, USD bn

Country	2025	2031	Share 2025	CAGR
United States	XXX	XXX	XXX	XXX
Germany	XXX	XXX	XXX	XXX
United Kingdom	XXX	XXX	XXX	XXX
Belgium	XXX	XXX	XXX	XXX
Netherlands	XXX	XXX	XXX	XXX
Japan	XXX	XXX	XXX	XXX
China	XXX	XXX	XXX	XXX
Mexico	XXX	XXX	XXX	XXX

Source: XXX

Chickpea Market Competitive Landscape and Company Share

The chickpea market is structurally fragmented because farm production, local aggregation and primary processing are distributed across thousands of enterprises. Large merchants such as AGT Food and Ingredients, Olam Agri, Louis Dreyfus Company, Bunge, ETG and BroadGrain achieve scale through multi-origin sourcing, logistics, destination distribution and risk management rather than through control of global production.

Competitive differentiation rests on access to growers, storage coverage, cleaning and colour-sorting capability, calibre segregation, residue compliance, freight execution and customer credit. Consumer-facing businesses including Tata Consumer Products and AWL Agri Business add value through branded packaged pulses, while specialists such as Arbel and Simpson Seeds compete through pulse expertise and export-grade quality.

Consolidation is increasing in global agricultural merchandising, highlighted by Bunge's July 2025 completion of its merger with Viterra. At the same time, Louis Dreyfus Company established a dedicated pulses business in 2024 and reported becoming Australia's largest chickpea exporter in 2025. Investment is moving toward integrated origination, traceability, high-specification processing and ingredient applications rather than commodity capacity alone.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
AGT Food and Ingredients Inc.	XXX	XXX	XXX	XXX
Olam Agri Holdings Pte. Ltd.	XXX	XXX	XXX	XXX
Louis Dreyfus Company B.V.	XXX	XXX	XXX	XXX
Bunge Global SA	XXX	XXX	XXX	XXX
ETG Group	XXX	XXX	XXX	XXX
BroadGrain Commodities Inc.	XXX	XXX	XXX	XXX
Arbel Bakliyat Hububat Sanayi ve Ticaret A.S.	XXX	XXX	XXX	XXX
Simpson Seeds Inc.	XXX	XXX	XXX	XXX
Tata Consumer Products Limited	XXX	XXX	XXX	XXX
AWL Agri Business Limited	XXX	XXX	XXX	XXX

Source: XXX

Chickpea Market Forecast and Commercial Opportunities

The market will add USD XXX billion between 2025 and 2031 as consumption growth and product mix outweigh periodic commodity-price corrections. Baseline growth is supported by South Asian food demand, premium kabuli exports and higher-value flour, snack and ingredient channels; weather-driven supply contractions will continue to create pronounced annual price cycles.

The strongest returns will accrue to suppliers that can maintain multi-origin coverage and consistently meet destination specifications. Contracted production, digital traceability, optical sorting, residue surveillance and application-specific milling will increasingly separate strategic suppliers from transactional merchants.

Upside to the forecast comes from faster adoption of chickpea protein and convenience foods, alongside sustained acreage growth in Australia and North America. Downside risk is concentrated in consecutive large Indian harvests, substitution by cheaper pulses, restrictive residue rules and processing projects that fail to achieve competitive taste, texture or extraction economics.

Opportunities

- Large-calibre kabuli contract production for premium export markets
- Chickpea protein concentrates and isolates for allergen-conscious formulations
- Ready-to-cook, pre-soaked and shelf-stable packaged chickpeas
- Regenerative rotation programmes with traceable environmental attributes
- Expansion of certified-organic and residue-controlled supply
- Cleaning, grading and processing investment near emerging production clusters

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