



Global Lentil 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 (2024)	USD 7.9 bn
Forecast (2031)	USD 11.5 bn
CAGR (2021-2031)	5.5%
Study period	2021-2031
Largest region	Asia-Pacific · 46.8%
Fastest-growing region	Middle East and Africa · 6.4%
Market concentration	Low
Licence	Individual / Company

The global lentil market was valued at USD XXX billion in 2024 and will reach USD XXX billion by 2031, expanding at a XX% CAGR. Asia-Pacific accounted for XX% of 2024 market value, supported by India's structural supply deficit, entrenched household consumption and expanding packaged-food distribution. Red lentils remained the largest product category with a XX% share, while flours and functional lentil ingredients delivered the strongest value growth. Trade remains anchored by Canadian and Australian export supply, with crop yields, Indian tariff policy and processing capacity determining prices and margins.

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Executive summary

The global lentil market was valued at USD XXX billion in 2024 and will reach USD XXX billion by 2031, expanding at a XX% CAGR. Asia-Pacific accounted for XX% of 2024 market value, supported by India's structural supply deficit, entrenched household consumption and expanding packaged-food distribution. Red lentils remained the largest product category with a XX% share, while flours and functional lentil ingredients delivered the strongest value growth. Trade remains anchored by Canadian and Australian export supply, with crop yields, Indian tariff policy and processing capacity determining prices and margins.

Indicator	Value
Market size 2024	XXX
Forecast 2031	XXX
CAGR	XXX
Largest region	XXX
Fastest region	XXX

Key findings

- The global lentil market generated USD XXX billion in 2024 and will add USD XXX billion of annual value by 2031.
- FAOSTAT recorded approximately XXX tonnes of global dry-lentil production in 2023.
- Statistics Canada reported Canadian lentil production of XXX tonnes in 2024, XX% above 2023.
- The Australian Bureau of Statistics reported XXX tonnes of lentils sold in 2024-25, with a local value of AUD XXX.
- India imported XXX kilograms of lentils worth USD XXX billion in 2023, making lentils its largest imported pulse category by value.
- Red lentils represented XX% of global market value in 2024 because of their central role in South Asian, Middle Eastern and North African diets.
- Whole lentils retained a XX% share by form, while lentil flour and functional ingredients will expand at CAGRs of XX% and XX%, respectively.
- Asia-Pacific accounted for XX% of 2024 value, while the Middle East and Africa will record the fastest regional 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 Lentil Market Trends and Growth Drivers

Lentils occupy an unusual position between a staple food and a globally traded specialty crop. Demand is broad and recurring, but international availability is concentrated in a small group of rain-fed production regions, allowing weather in Saskatchewan, Victoria or South Australia to influence prices paid by households and processors thousands of kilometres away.

The demand base is becoming more diversified. Traditional dal, soup and household cooking still account for most volume, while packaged retail, foodservice and formulated foods are increasing the value captured from each tonne. Processors that control varietal purity, colour, cooking quality and residue compliance are therefore separating themselves from businesses competing solely on bulk price.

Policy remains a market-moving variable. Indian tariffs and buffer-stock decisions can reshape trade within weeks, while organic, traceability and residue rules determine access to premium Western markets. These forces favour suppliers with multi-origin procurement, flexible logistics and destination-specific quality systems.

Growth drivers

South Asian pulse demand

India, Bangladesh, Nepal and Pakistan sustain the world's deepest lentil-consumption base, with lentils embedded in daily meals across income groups. Population growth, urban food distribution and periodic domestic crop shortfalls keep import demand structurally active and make South Asia the principal determinant of internationally traded red-lentil volumes.

Affordable plant-protein positioning

Lentils combine protein, fibre, micronutrients and shelf stability at a lower cost per serving than most animal proteins and many processed alternatives. This value proposition strengthens household demand during food-price inflation and supports institutional procurement for schools, humanitarian programmes and community nutrition.

Value-added lentil foods

Food manufacturers are incorporating lentil flour and concentrates into pasta, extruded snacks, bakery mixes, meat alternatives and gluten-free formulations. These applications raise revenue per tonne, create demand for specification-controlled crops and reduce processor dependence on bulk commodity margins.

Modern retail and packaged pulses

Supermarkets, discounters and digital grocers are shifting lentils from open bulk trade into branded and private-label packs with reliable cooking performance and traceable origin. Packaged formats increase unit value and improve access to urban households seeking convenience, hygiene and consistent quality.

Food-security procurement

Governments and relief agencies use pulses to build buffers and deliver calorie-efficient protein through public distribution and humanitarian programmes. Large tenders can absorb exportable supply rapidly, supporting processor utilisation and trade even when discretionary consumer spending weakens.

Low-input crop rotations

Lentils fix atmospheric nitrogen and provide growers with a rotational break from cereals and oilseeds. Higher fertiliser costs, soil-health objectives and breeding advances support acreage retention in Canada, Australia, Kazakhstan and the northern United States.

Restraints

Climate-driven yield volatility

Lentil yields and grade distribution are highly sensitive to drought, heat during flowering, excess harvest moisture and disease pressure. Crop failures tighten export availability and lift prices, while unexpectedly strong harvests can create inventory overhangs and sharp margin compression.

Trade-policy instability

India's frequent changes to import duties, stock controls and procurement policy alter landed economics across the global trade. Exporters and processors must manage shipment timing, inventory exposure and destination risk when policy changes occur between contracting and arrival.

Commodity margin pressure

Large Canadian or Australian crops can push bulk prices below processors' inventory costs and narrow spreads for cleaning and splitting. Businesses without differentiated specifications, brands or downstream ingredients remain particularly exposed to working-capital losses.

Residue and phytosanitary compliance

Import tolerances for crop-protection residues, weed seeds, pests and documentation vary across destination markets. Failed tests or inconsistent maximum-residue limits can delay cargoes, trigger reprocessing and prevent suppliers from serving premium retail and organic channels.

Lentil Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
South Asian pulse demand	XXX	XXX	XXX
Affordable plant-protein positioning	XXX	XXX	XXX
Value-added lentil foods	XXX	XXX	XXX
Modern retail and packaged pulses	XXX	XXX	XXX
Food-security procurement	XXX	XXX	XXX
Low-input crop rotations	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Climate-driven yield volatility	XXX	XXX	XXX
Trade-policy instability	XXX	XXX	XXX
Commodity margin pressure	XXX	XXX	XXX
Residue and phytosanitary compliance	XXX	XXX	XXX

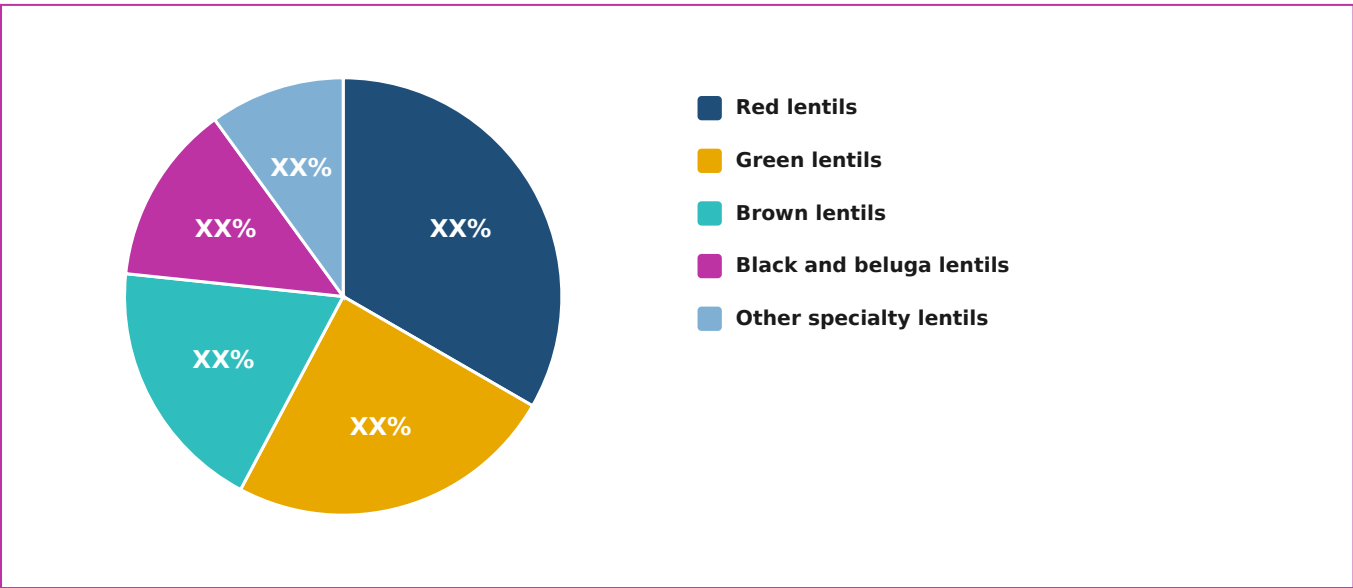
Source: XXX

Lentil Market Segmentation by Type, Form, Application and Channel

By Product Type

Red lentils dominate international trade because they cook quickly and form the core of dal, soup and puree consumption across South Asia, Türkiye and the Middle East. Green and brown lentils serve salads, soups and retail staples, particularly in Europe and North America. Black, beluga and other specialty types are expanding faster from a smaller base as chefs and premium retailers favour visual differentiation, firm texture and origin claims.

Value share by product Type, 2024



Source: XXX

Value by product Type, USD bn

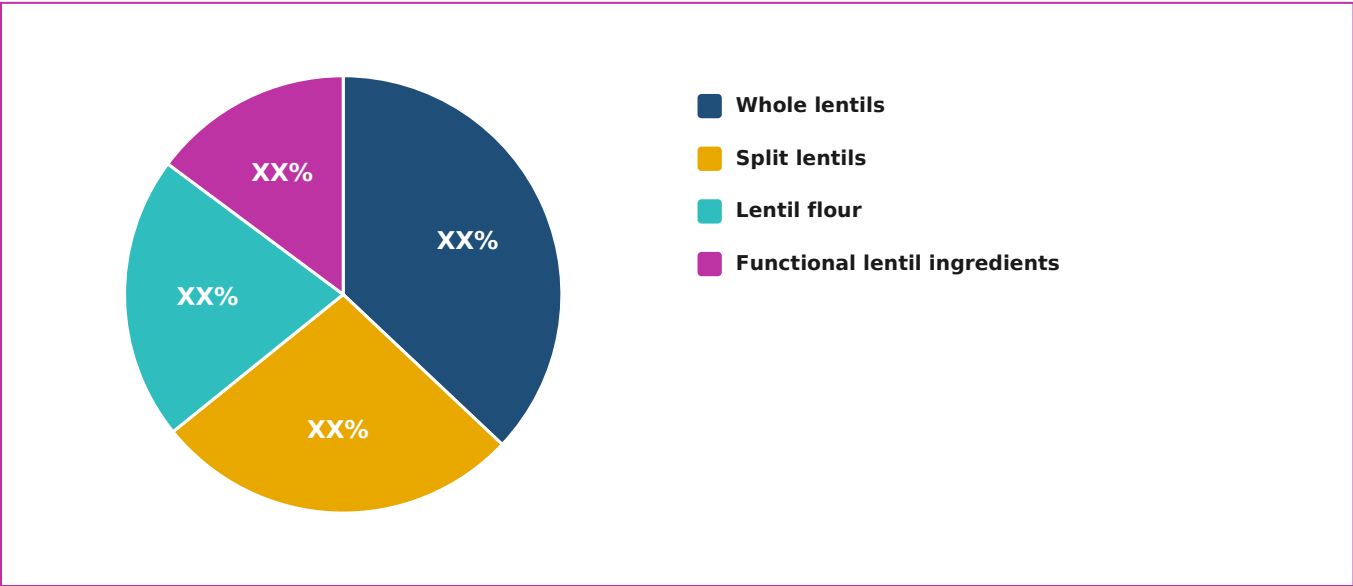
Segment	2026	2027	2028	2029	2030	2031	Share 2024	CAGR
Red lentils	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Green lentils	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Brown lentils	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Black and beluga lentils	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other specialty lentils	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Form

Whole lentils remain the largest form because they serve retail, foodservice and destination-market splitting operations. Split lentils benefit from shorter cooking times and entrenched South Asian demand. Flour and functional ingredients are gaining share as manufacturers formulate gluten-free pasta, snacks, bakery products, meat alternatives and nutrition systems.

Value share by form, 2024



Source: XXX

Value by form, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2024	CAGR
Whole lentils	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Split lentils	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Lentil flour	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Functional lentil ingredients	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Production Method

Conventional production leads because commodity buyers prioritise affordability, scale and reliable delivery. Organic lentils command higher retail and ingredient premiums in Europe and North America but require segregated storage, certified handling and tighter residue management. Regenerative and verified low-input programmes are emerging between conventional and fully organic systems.

Value by production Method, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2024	CAGR
Conventional	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Organic	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Application

Household cooking remains the largest application because lentils are dietary staples across South Asia, the Middle East and parts of Africa. Foodservice demand spans institutional kitchens, restaurants and catering, while processed-food use is moving into soups, ready meals, pasta and snacks. Ingredient applications grow fastest as flour, concentrates and texturised products enable protein and fibre claims.

Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2024	CAGR
Household consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Foodservice	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Processed foods	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Food ingredients	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Feed and other uses	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Distribution Channel

Wholesale and bulk trade remains central in price-sensitive consuming markets and for industrial buyers purchasing container or truckload volumes. Supermarkets and hypermarkets lead formal packaged retail, supported by private-label expansion. Specialist stores retain relevance for ethnic, organic and premium varieties, while online channels are scaling through subscription, pantry-staple and direct-to-consumer formats.

Value by distribution Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2024	CAGR
Wholesale and bulk trade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Supermarkets and hypermarkets	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Specialist and traditional stores	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Online retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

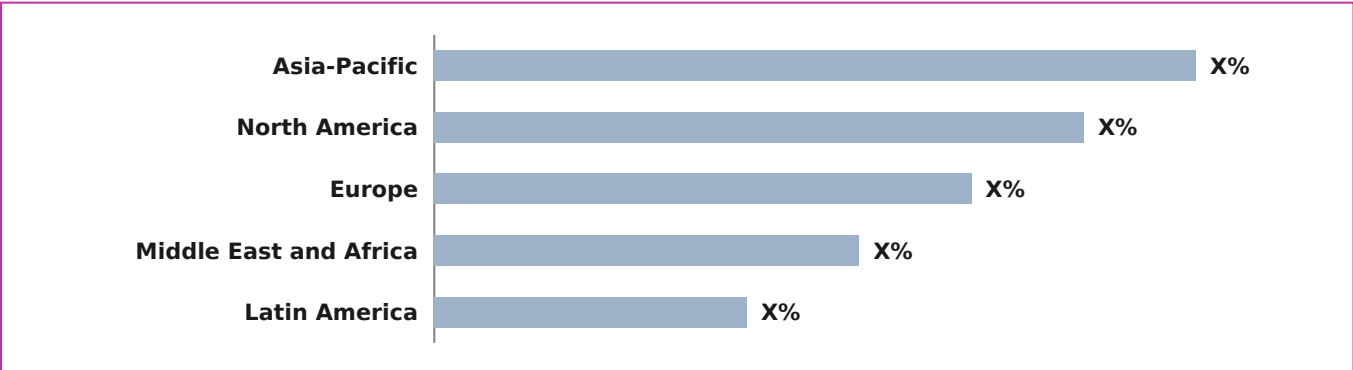
Lentil Market Regional Analysis and Country Outlook

Asia-Pacific held XX% of global market value in 2024, led by India and reinforced by large consumption bases in Bangladesh, Nepal, Pakistan and Sri Lanka. India's domestic masoor crop does not consistently match demand, making import policy and public stock management decisive for Canadian and Australian exporters. Rising packaged-food penetration is also moving value from traditional wholesale markets into branded retail packs, ready-to-cook mixes and prepared dals.

North America combines Canada's export-oriented production system with a growing United States consumer and ingredient market. Saskatchewan is the central global supply hub, accounting for XX% of western Canadian lentil production in 2024, while processors across the Canadian Prairies and northern United States provide cleaning, splitting, flour milling and extrusion capacity. Europe is smaller in volume but delivers attractive pricing for organic, green, black and origin-certified lentils.

The Middle East and Africa will post the fastest regional CAGR of XX% through 2031. Türkiye, Egypt, Algeria, Morocco and the Gulf states sustain strong red-lentil demand, while population growth, urban retail and food-security programmes broaden consumption in Sub-Saharan Africa. Latin America remains a developing opportunity led by Brazil, Mexico, Colombia and Chile, with packaged retail and health-positioned foods growing faster than traditional bulk channels.

Growth rate by region, 2024-2031



Source: XXX

Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2024	CAGR
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	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	2024	2031	Share 2024	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

Lentil Market Competitive Landscape and Company Share

The global lentil market is fragmented at the farm and trading levels, but export processing is more concentrated around major origin hubs in Canada, Australia, Türkiye and the United States. AGT Food and Ingredients has the broadest lentil-focused processing and value-added platform, while Bunge, Cargill, Richardson International, ETG and Scoular compete through origination networks, logistics, risk management and multinational customer access.

Competition is shifting from simple crop aggregation toward colour sorting, specification control, dehulling, splitting, flour milling, extrusion and consumer packaging. Exporters with diversified origins can redirect supply when weather or trade rules disrupt a producing country, while regional specialists compete through grower relationships, varietal expertise and faster contract execution.

Bunge completed its merger with Viterra in July 2025, increasing the scale of a major global origination and logistics network. AGT's Minot extrusion investment and renewed public listing highlight the parallel move toward higher-value plant-based foods. Through 2031, acquisitions are expected to target processing assets, branded ethnic-food portfolios and traceable organic supply rather than farmland.

Leading companies

Company	HQ	Est. revenue 2024	Market share 2024	YoY
AGT Food and Ingredients Inc.	XXX	XXX	XXX	XXX
Bunge Global SA	XXX	XXX	XXX	XXX
Cargill, Incorporated	XXX	XXX	XXX	XXX
Richardson International Limited	XXX	XXX	XXX	XXX
ETG Group	XXX	XXX	XXX	XXX
The Scoular Company	XXX	XXX	XXX	XXX
Arbel Group	XXX	XXX	XXX	XXX
Simpson Seeds Inc.	XXX	XXX	XXX	XXX
BroadGrain Commodities Inc.	XXX	XXX	XXX	XXX
Columbia Grain International LLC	XXX	XXX	XXX	XXX

Source: XXX

Lentil Market Forecast, Scenarios and Investment Opportunities

The market will expand from USD XXX billion in 2024 to USD XXX billion in 2031. Volume growth will remain steady, while product upgrading, packaged distribution and specialty ingredients lift average realised value. Asia-Pacific will contribute the largest absolute increase, and the Middle East and Africa will deliver the highest percentage growth.

The central forecast assumes normalised yields across Canada and Australia, continued Indian access to imported lentils under a variable tariff regime and sustained food inflation below the peaks observed earlier in the decade. A tight-supply scenario driven by simultaneous weather losses would lift nominal market value but constrain processed-food volumes; a surplus scenario would reduce crop prices while accelerating adoption by cost-sensitive food manufacturers.

Winning suppliers will combine multi-origin procurement, residue control, dependable cooking specifications and value-added processing. The strongest investment cases sit in red-lentil splitting near export origins, destination-market packaging, specialty green and black varieties, and lentil flour or extrusion systems serving gluten-free and high-protein foods.

Opportunities

- High-protein lentil flour and fractionated ingredient systems
- Premium organic, regenerative and origin-certified lentils
- Convenient retort pouches, frozen meals and ready-to-eat dals
- Supply-chain investment in colour sorting, dehulling and container logistics
- Market development in Sub-Saharan Africa and Southeast Asia
- Climate-resilient cultivars with improved yield and disease resistance

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