

Global Pigeon Pea Market 2026

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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Market at a glance

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Indicator	Value
Market size (2025)	USD 5.1 bn
Forecast (2031)	USD 7.2 bn
CAGR (2021-2031)	5.8%
Study period	2021-2031
Largest region	Asia-Pacific · 72.4%
Fastest-growing region	Africa · 6.7%
Market concentration	Low
Licence	Individual / Company

The global pigeon pea market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Asia-Pacific accounted for XX% of market value, supported by India's position as the dominant producer, consumer and importer of tur or arhar. Supply diversification across Myanmar, Tanzania, Mozambique, Malawi and Kenya is strengthening the international trade corridor into South Asia. Government procurement, climate-resilient cultivars, branded dal penetration and demand for affordable plant protein will shape pricing and investment through 2031.

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Executive summary

The global pigeon pea market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Asia-Pacific accounted for XX% of market value, supported by India's position as the dominant producer, consumer and importer of tur or arhar. Supply diversification across Myanmar, Tanzania, Mozambique, Malawi and Kenya is strengthening the international trade corridor into South Asia. Government procurement, climate-resilient cultivars, branded dal penetration and demand for affordable plant protein will shape pricing and investment through 2031.

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

Key findings

- The global pigeon pea market generated USD XXX billion in 2025 and will reach USD XXX billion in 2031.
- FAOSTAT recorded XXX tonnes of pigeon pea production in India in 2023, confirming the country as the world's largest producer.
- India, Malawi, Myanmar, Tanzania and Kenya collectively accounted for more than XX% of recorded global output in 2023.
- UN Comtrade data for HS 071360 indicate global reported imports of approximately XXX tonnes valued at USD XXX billion in 2024.
- India represented approximately XX% of reported global pigeon pea import value in 2024.
- Split and dehulled dal represented XX% of global market value in 2025, reflecting its central role in South Asian household diets.
- Bulk sacks remained the leading packaging format with XX% of market value, while sealed consumer pouches recorded the fastest growth.
- Africa will post the fastest regional CAGR at XX% through 2031 as improved seed adoption and export-oriented aggregation expand.

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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

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Global Pigeon Pea Market Trends and Growth Drivers

Pigeon pea economics are governed by the interaction between India's large structural consumption requirement and a narrow group of rainfed producing origins. This creates a market in which monsoon performance, Indian public stocks and import-policy decisions transmit quickly into farm-gate and landed prices.

Production technology is beginning to alter that structure. Short-duration, heat-tolerant and disease-resistant cultivars expand feasible planting windows, reduce climate exposure and support mechanized harvest. African commercialization adds geographic diversity, while stronger warehouses and grading systems increase the share of output that meets export specifications.

Value growth is also moving downstream. Branded dal, sealed pouches, e-commerce and ingredient applications create premiums beyond undifferentiated bulk grain. Companies that control quality from seed and farm aggregation through testing, milling and packaging will capture the strongest margins.

Growth drivers

Affordable plant protein demand

Pigeon pea is embedded in everyday protein consumption across India and parts of East Africa, giving it a broad and recurring demand base. Population growth, urban meal preparation and pressure on household food budgets support consumption of tur dal relative to higher-cost animal protein.

India's procurement-led production support

India's commitment to procure tur offered by registered farmers at the minimum support price improves revenue visibility and encourages acreage retention. The mechanism also expands public stocks, influences open-market availability and establishes a price reference for imports.

African export-corridor expansion

Myanmar remains the leading internationally traded origin, while Tanzania, Mozambique and Malawi are building stronger farm aggregation and export links. Investment in cleaning, grading, port handling and buyer relationships is converting a larger portion of African production into standardized commercial supply.

Climate-resilient seed adoption

Short-duration, heat-tolerant and disease-resistant cultivars reduce exposure to erratic rainfall and widen feasible planting windows. Varieties suited to mechanized harvesting and rice-fallow rotations can raise harvested area and lower unit production costs.

Packaged dal penetration

Branded processors are displacing loose retail sales through cleaned, graded and sealed pigeon pea products. The transition raises average realization per kilogram and rewards processors able to guarantee

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grain uniformity, food safety and reliable cooking performance.

Pulse-based ingredient innovation

Milled pigeon pea is entering composite flours, protein-rich snacks, instant foods and institutional nutrition formulations. Ingredient applications remain smaller than household dal consumption but create higher-value outlets for broken grains and standardized flour.

Restraints

Monsoon and climate volatility

A large share of pigeon pea acreage is rainfed, leaving yields sensitive to delayed rainfall, terminal drought and unseasonal precipitation during harvest. Production shocks tighten milling supply rapidly because stocks and alternative export origins are limited.

India trade-policy volatility

India's dominant share of global import demand makes changes in import status, procurement and stock-release policy consequential for every exporting origin. Sudden policy adjustments can compress landed margins, redirect cargoes and amplify inventory risk.

Crop disease and insect pressure

Sterility mosaic disease, Fusarium wilt and pod borers can materially reduce output and downgrade grain quality. Limited access to resistant seed and crop protection among smallholders slows productivity improvement in several production clusters.

Post-harvest quality losses

Insufficient drying, storage, grading and pest control increase breakage, discoloration and contamination between farm and mill. Quality variability raises rejection risk for exporters and limits the premium captured by smallholder supply chains.

Pulse substitution and price elasticity

Consumers and institutional buyers can substitute chickpea, lentil, mung bean or field pea when pigeon pea prices rise sharply. This substitution limits pricing power for processors and reduces volume growth during acute supply deficits.

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Pigeon Pea Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Affordable plant protein demand	XXX	XXX	XXX
India's procurement-led production support	XXX	XXX	XXX
African export-corridor expansion	XXX	XXX	XXX
Climate-resilient seed adoption	XXX	XXX	XXX
Packaged dal penetration	XXX	XXX	XXX
Pulse-based ingredient innovation	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Monsoon and climate volatility	XXX	XXX	XXX
India trade-policy volatility	XXX	XXX	XXX
Crop disease and insect pressure	XXX	XXX	XXX
Post-harvest quality losses	XXX	XXX	XXX
Pulse substitution and price elasticity	XXX	XXX	XXX

Source: XXX

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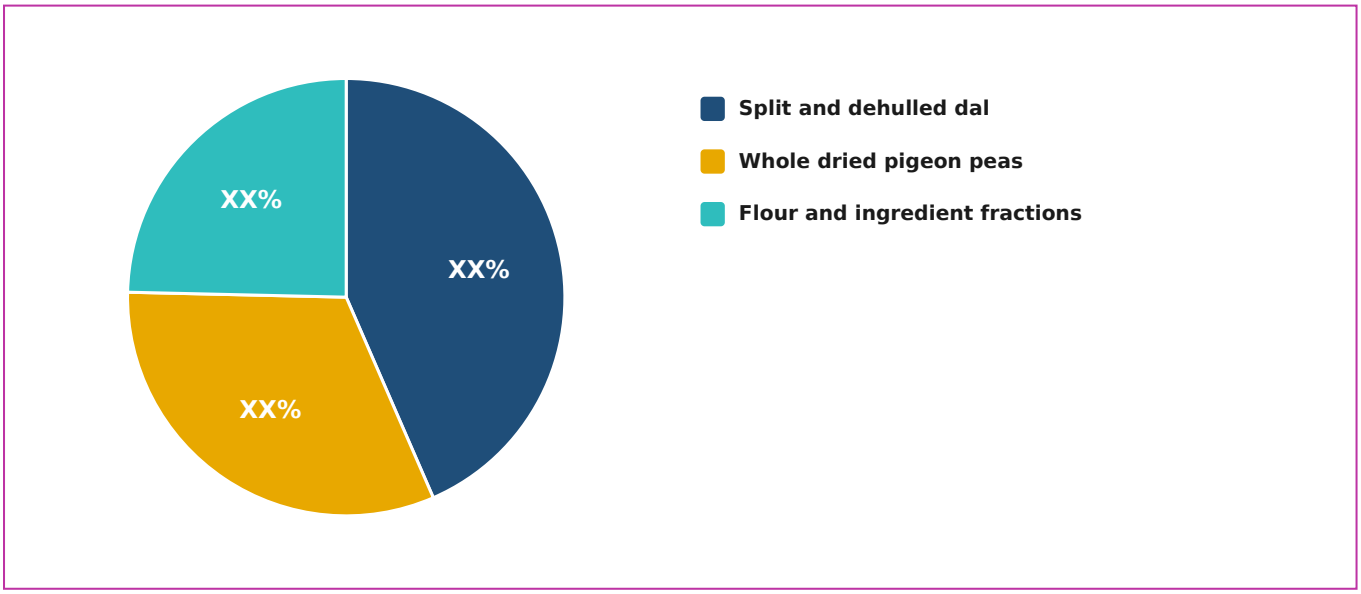
Pigeon Pea Market Segmentation by Product, Processing, Packaging and Channel

By Product Form

Split dal dominates because it is the standard retail and household format in India, the market's largest consumption center. Whole dried grain remains essential for international trade, milling and Caribbean food applications. Flour and ingredient-grade fractions are gaining through snack, instant-food, blended-flour and institutional nutrition uses.

Value share by product Form, 2025



Source: XXX

Value by product Form, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Split and dehulled dal	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Whole dried pigeon peas	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Flour and ingredient fractions	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Processing Method

Conventional supply dominates mainstream household, wholesale and foodservice consumption because of its broader acreage and lower unit cost. Certified organic pigeon pea commands premiums in North America, Europe and affluent urban retail. Growth is constrained by certification costs, segregation requirements and limited identity-preserved supply.

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Value by processing Method, USD bn

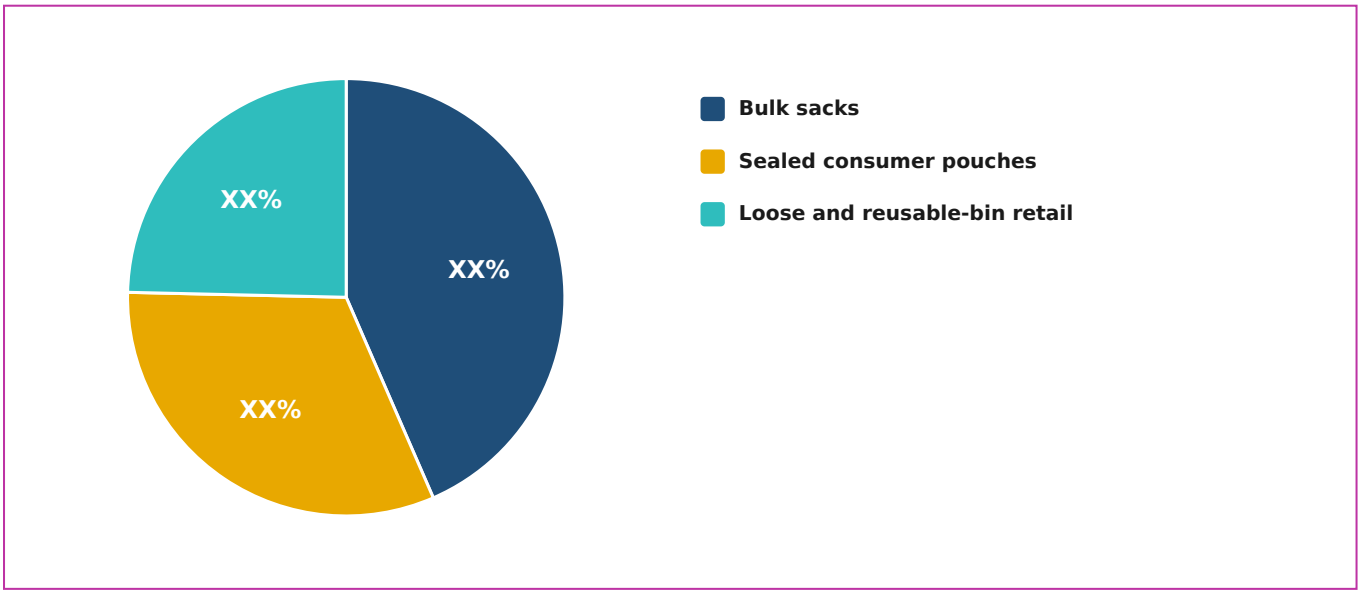
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Conventional	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Certified organic	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Packaging Format

Bulk polypropylene and jute sacks remain standard for trade, institutional sales and movement from origin to mill. Sealed pouches are expanding through modern retail and e-commerce because they support branded pricing, hygiene and traceability. Loose retail retains a sizable presence in traditional markets but loses share as urban food-safety expectations rise.

Value share by packaging Format, 2025



Source: XXX

Value by packaging Format, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Bulk sacks	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Sealed consumer pouches	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Loose and reusable-bin retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Distribution Channel

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Traditional grocers and wholesale markets remain central to household purchasing in India and Africa. Business-to-business channels serve mills, repackers and food manufacturers and carry the largest bulk consignments. Supermarkets and online platforms are capturing branded sales by offering standardized grades, smaller packs and subscription purchasing.

Value by distribution Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Traditional retail and wholesale markets	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Business-to-business processors and repackers	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Supermarkets and hypermarkets	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Foodservice and institutional distributors	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Online grocery	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By End Use

Household consumption leads because pigeon pea dal is a frequent staple in South Asian meals and whole peas are established in Caribbean cuisines. Foodservice demand tracks urban dining, workplace catering and institutional feeding. Ingredient processors provide the fastest-growth outlet as milling technology and pulse-based product development improve.

Value by end Use, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Household food	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Foodservice and institutional meals	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Food ingredients and formulated foods	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Seed, feed and other commercial uses	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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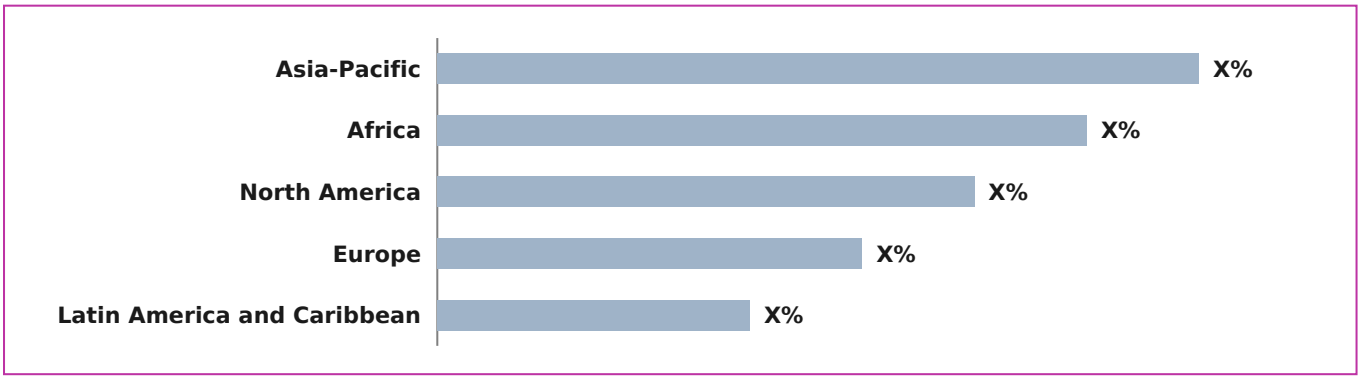
Pigeon Pea Market Regional Analysis and Country Outlook

Asia-Pacific generated XX% of global market value in 2025, with India accounting for the majority of production, milling and final consumption. India's domestic balance determines international prices: weak monsoons or lower acreage increase imports from Myanmar and African origins, while strong harvests and public procurement rebuild inventories. Myanmar remains the region's principal export origin and an essential counter-seasonal supplier to Indian processors.

Africa represented XX% of market value and will grow at a XX% CAGR through 2031, the fastest rate among regions. Malawi, Tanzania, Kenya and Mozambique combine suitable dryland conditions with established smallholder production, and investment in improved seed, aggregation and port logistics is increasing exportable surpluses. Domestic food demand and the crop's soil-fertility benefits provide a second growth engine beyond exports to India.

North America and Europe are smaller but higher-value markets centered on South Asian, Caribbean and East African diaspora consumption. Packaged dal, canned-food manufacturing inputs and specialty flours command higher unit prices than bulk grain. Latin American demand is concentrated in Caribbean and northern South American cuisines, with the Dominican Republic and regional foodservice distributors supporting steady import requirements.

Growth rate by region, 2025-2031



Source: XXX

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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
Africa	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
Latin America and Caribbean	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

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Pigeon Pea Market Competitive Landscape and Company Share

The pigeon pea market is fragmented, with the ten largest commercial participants controlling approximately XX% of global value in 2025. International merchants such as Olam Agri, ETG, AGT Food and Ingredients, Louis Dreyfus Company and BroadGrain compete through origination networks, working capital, logistics and destination-market access. Thousands of regional aggregators, dal mills and wholesale traders account for the balance.

Indian consumer-food groups including Tata Consumer Products, AWL Agri Business and LT Foods compete through procurement scale, milling standards, retail brands and national distribution. Their advantage is strongest in sealed consumer packs, while regional mills retain substantial share in loose and wholesale dal. Competitive differentiation increasingly rests on residue compliance, grain uniformity, traceable origin and stable cooking quality.

Investment is moving toward optical sorting, automated milling, hermetic storage, direct farmer procurement and African origin diversification. Transactions are more likely to involve warehouses, processing assets and distribution partnerships than large corporate takeovers because primary production remains dispersed. Seed technology partnerships with ICRISAT and national agricultural research systems are becoming strategically important.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Olam Agri	XXX	XXX	XXX	XXX
ETG	XXX	XXX	XXX	XXX
AGT Food and Ingredients	XXX	XXX	XXX	XXX
Louis Dreyfus Company	XXX	XXX	XXX	XXX
BroadGrain Commodities	XXX	XXX	XXX	XXX
Cargill	XXX	XXX	XXX	XXX
Tata Consumer Products	XXX	XXX	XXX	XXX
AWL Agri Business	XXX	XXX	XXX	XXX
LT Foods	XXX	XXX	XXX	XXX
Sresta Natural Bioproducts	XXX	XXX	XXX	XXX

Source: XXX

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Pigeon Pea Market Forecast, Scenarios and Investment Opportunities

Global market value will rise from USD XXX billion in 2025 to USD XXX billion in 2031. The central forecast assumes gradual yield improvement, sustained Indian consumption, stronger African export availability and continued migration from loose grain toward branded dal. Volume growth will provide the majority of expansion, with processing and packaging premiums contributing incremental value.

The upside scenario is driven by rapid commercialization of short-duration and heat-tolerant varieties, mechanized harvesting and successful expansion into rice-fallow and irrigated summer systems. These changes would improve supply reliability and support new flour and convenience-food applications. The downside scenario centers on repeated weather shocks, disease pressure and abrupt import-policy intervention that discourages export-oriented planting.

Winning companies will combine multi-origin procurement with local cleaning, grading and milling capacity. Buyers will place greater value on traceability, pesticide-residue management, moisture control and contracted supply. African processors that move from raw-grain exports into cleaned, graded and split product can capture a larger share of the value chain.

Opportunities

- Contract farming and traceable supply chains in East and Southern Africa
- Mechanically harvestable, short-duration seed varieties
- Retail-ready dal pouches for urban and diaspora consumers
- Pigeon pea flour for protein blends, snacks and gluten-free foods
- Solar drying, modern warehouses and optical sorting infrastructure
- Regional processing near African production clusters
- Digital procurement platforms linking smallholders to processors

> This preview shows the form and depth of the report. The full report contains every figure, segment- and country-level detail and full company profiles. On purchase all figures are finalised and verified, and the report is delivered within 24–72 hours.

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