



Growing Demand for Pulse Flours in USA

2020 Market insights adapted from customized reports from Euromonitor & Mintel

Outline

1. Pulse Flour Market

- Why pulse flours?
- How big is the US pulse flour market relative to flour industry?
- How have pulse flours penetrated different product categories?

2. How to win with pulse flours?

- Deep dive on pea flour market
- Deep dive on lentil flour market

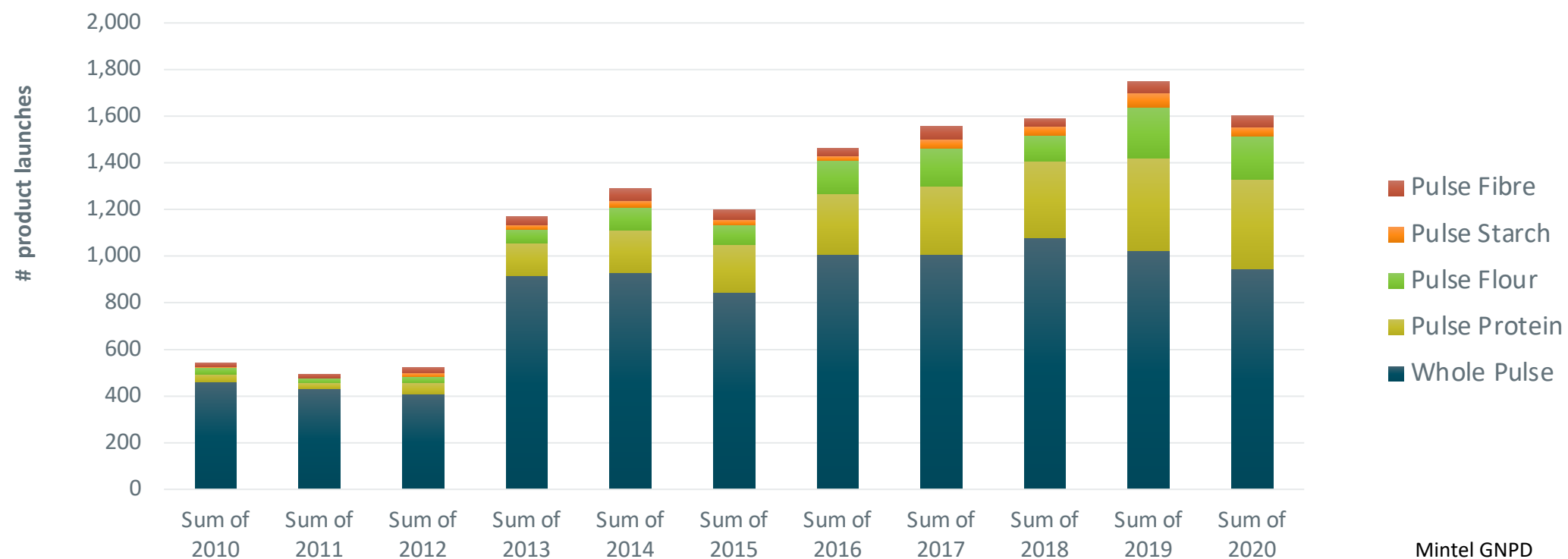
3. Summary: Prioritizing growth strategy for pulse flours



1. US Pulse Flour Market

Pulse Food Innovation on the Rise

New Product Launches with Pulses in US Retail
By Ingredient Format, 2010-2020



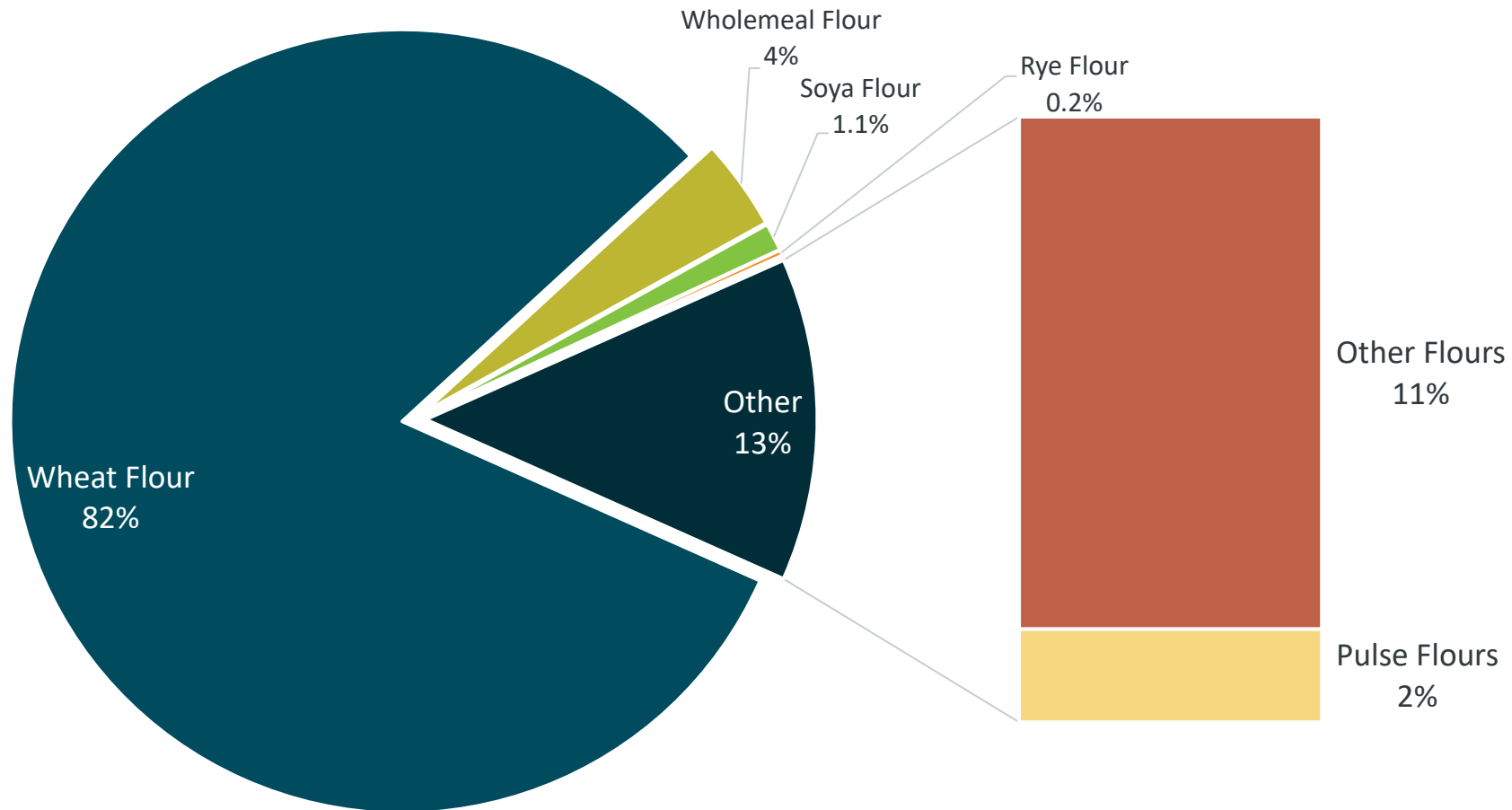
Why Pulse Flours?

- Alignment with consumer trends
 - ✓ nutritionally dense
 - ✓ plant-based
 - ✓ clean label
 - ✓ minimally processed
 - ✓ gluten free
 - ✓ sustainability
- Boost protein quality in cereal based foods
- Functional in a range of product applications



US Flour Market

Pulse Flours Comprise ~2% of Total US Flour Use* (2020)



*values based on volumes in end product sales through retail and foodservice channels to consumers

Source: Euromonitor Passport

Wheat flour use is big, but slowing...

- “Wheat flour is a common flour that’s economical. With gluten-free and other better-for-you dietary trends, companies are **formulating away from wheat flour.**” – Manufacturer
- “When consumers think corn and flour, they do not think plant based. Even though they are all coming from plants, **pulses carry that image of a good plant-based protein.**” - Miller



Pulses driving gains in a relatively flat flour industry

Growth in use of pulse flours in select categories (CAGR),
2020-23

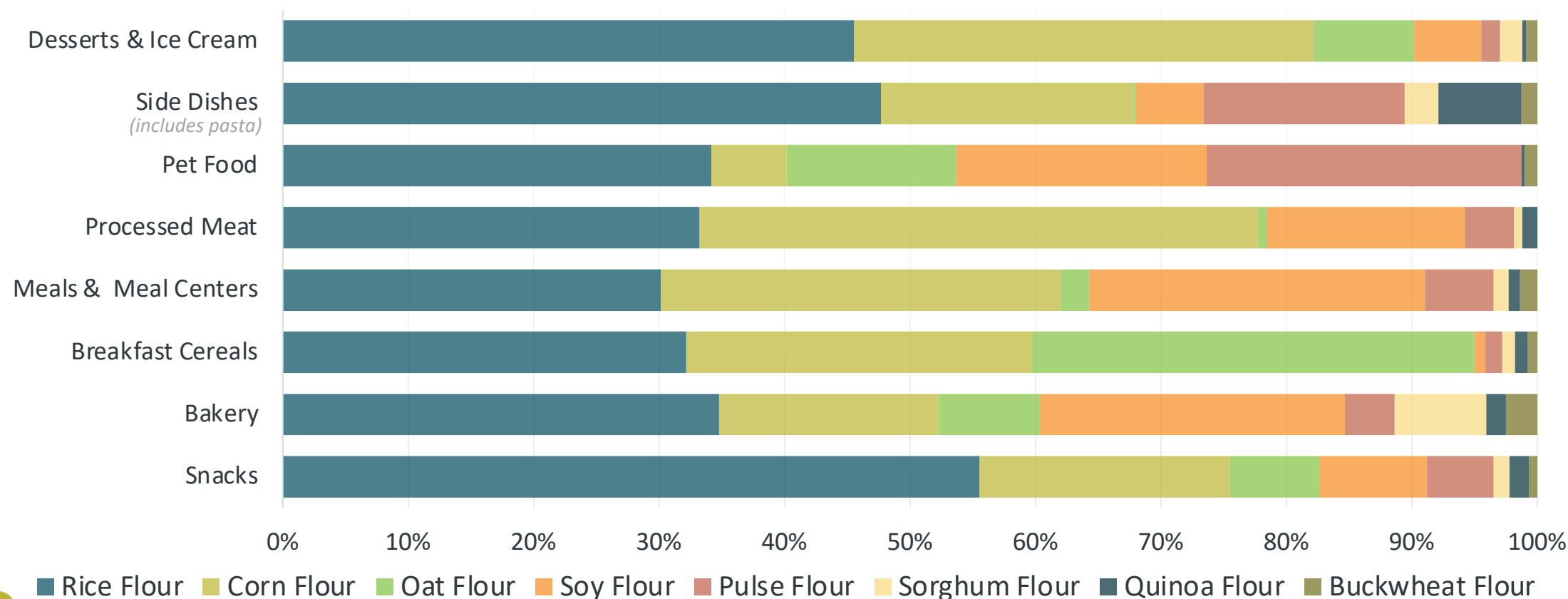


Source: Euromonitor Passport and Custom Data

Note: Other flours include any flours other than wheat, wholemeal flour, rye, and soya flour.

Pulse flours penetrating key categories: Pet food, Snacks, Pasta/Side Dishes

PROPORTION OF NEW LAUNCHES CONTAINING TOP GLUTEN-FREE FLOURS, 2015-2020



Source: Mintel GNPD

Size of the US Pulse Flour Market

230,175

- Volume of Pulse Flour, 2020 tonnes (packaged food & pet food)

20.1%

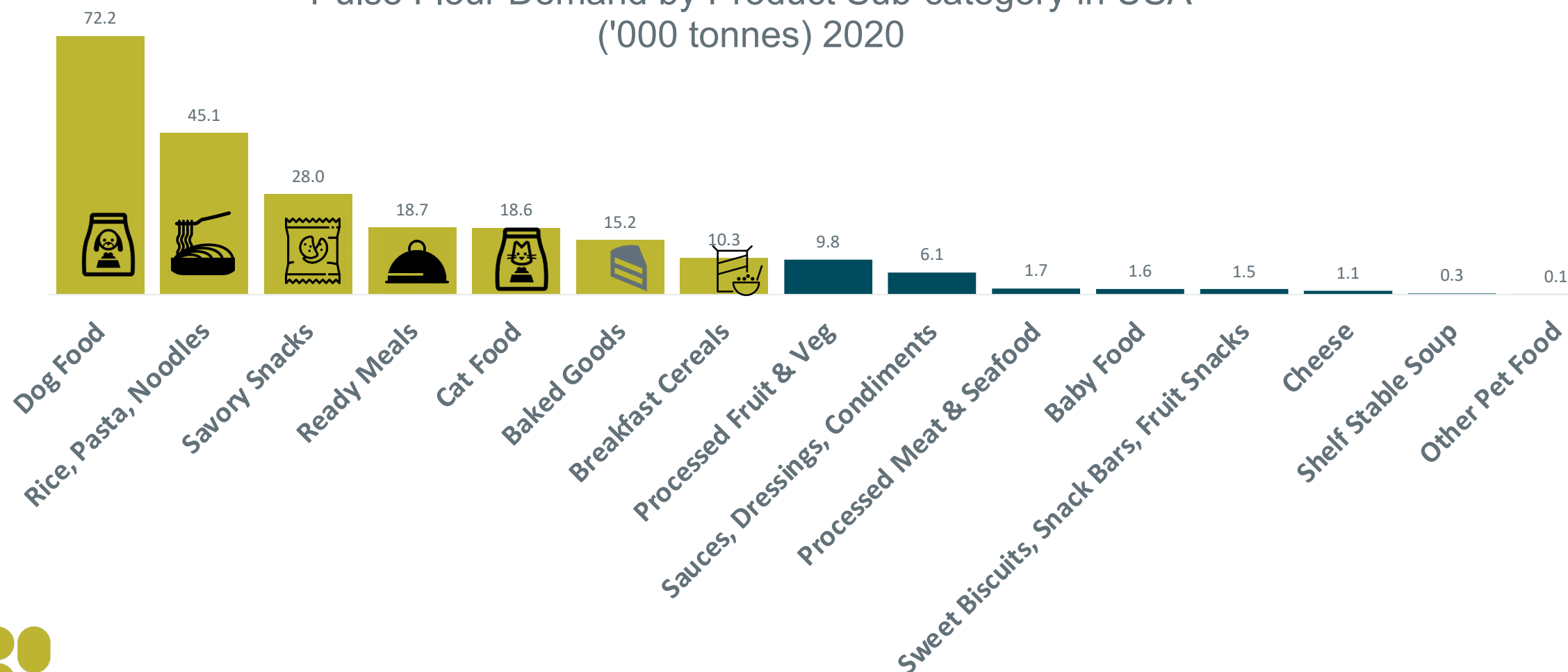
- Pulse growth, CAGR 2020-2023

4.7%

- Pulse share of Total Flour (based on 2023 forecast)

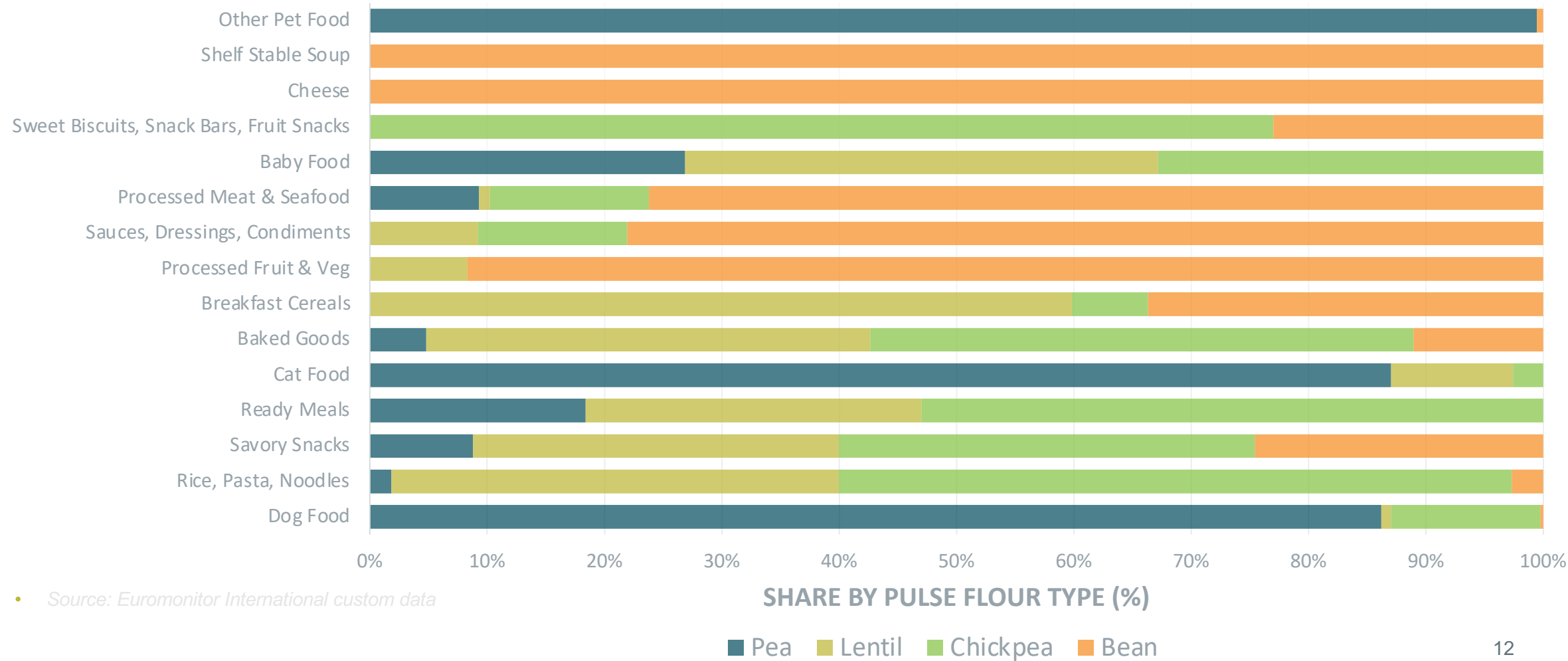
Pulse flours are diversifying out of pet food and extending into packaged foods

Pulse Flour Demand by Product Sub-category in USA
(^{'000 tonnes}) 2020



Proportion of pulse use varies by application

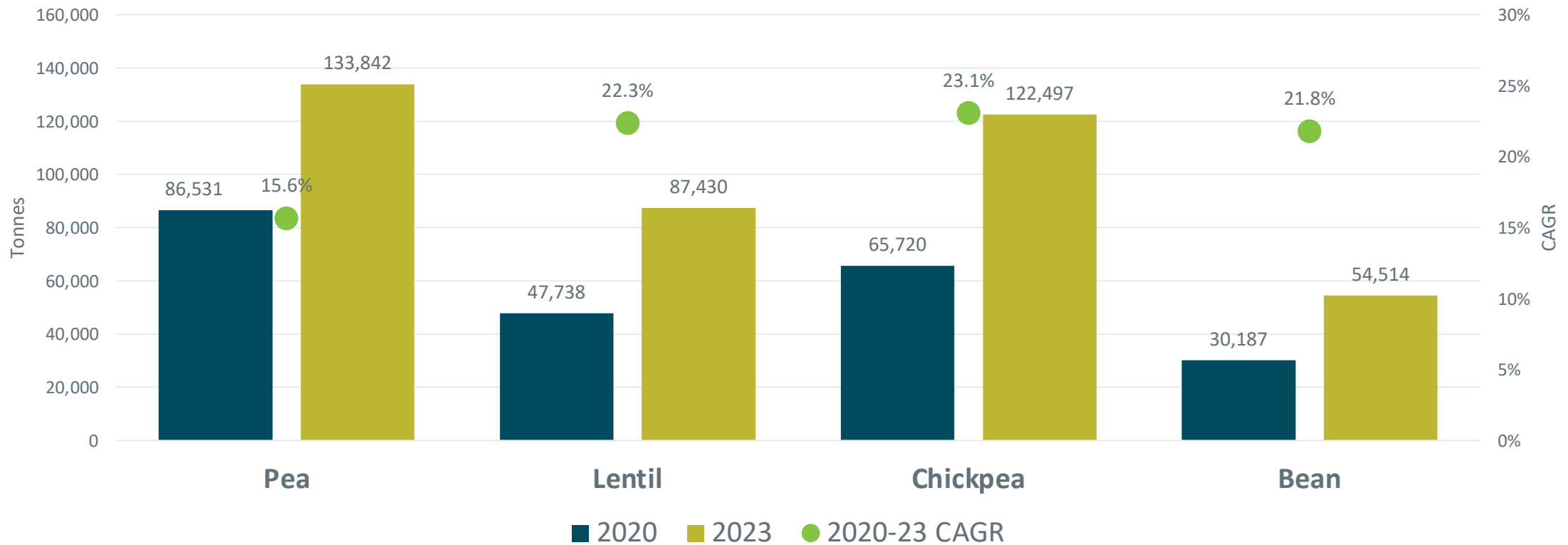
PULSE FLOUR DEMAND BY CATEGORY AND PULSE TYPE
(% OF TOTAL PULSE VOLUME), 2020



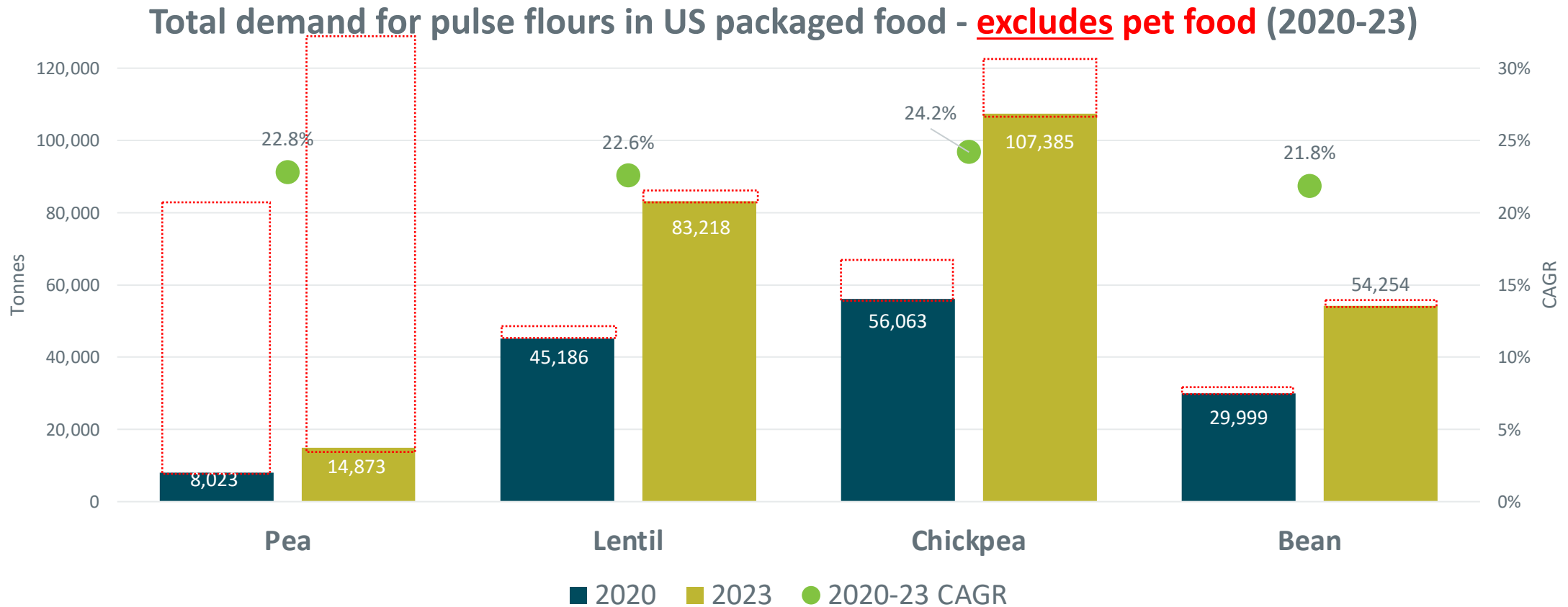
Source: Euromonitor International custom data

All pulse flour types are expected to register strong growth

Total demand for pulse flours in US packaged food - includes pet food (2020-23)

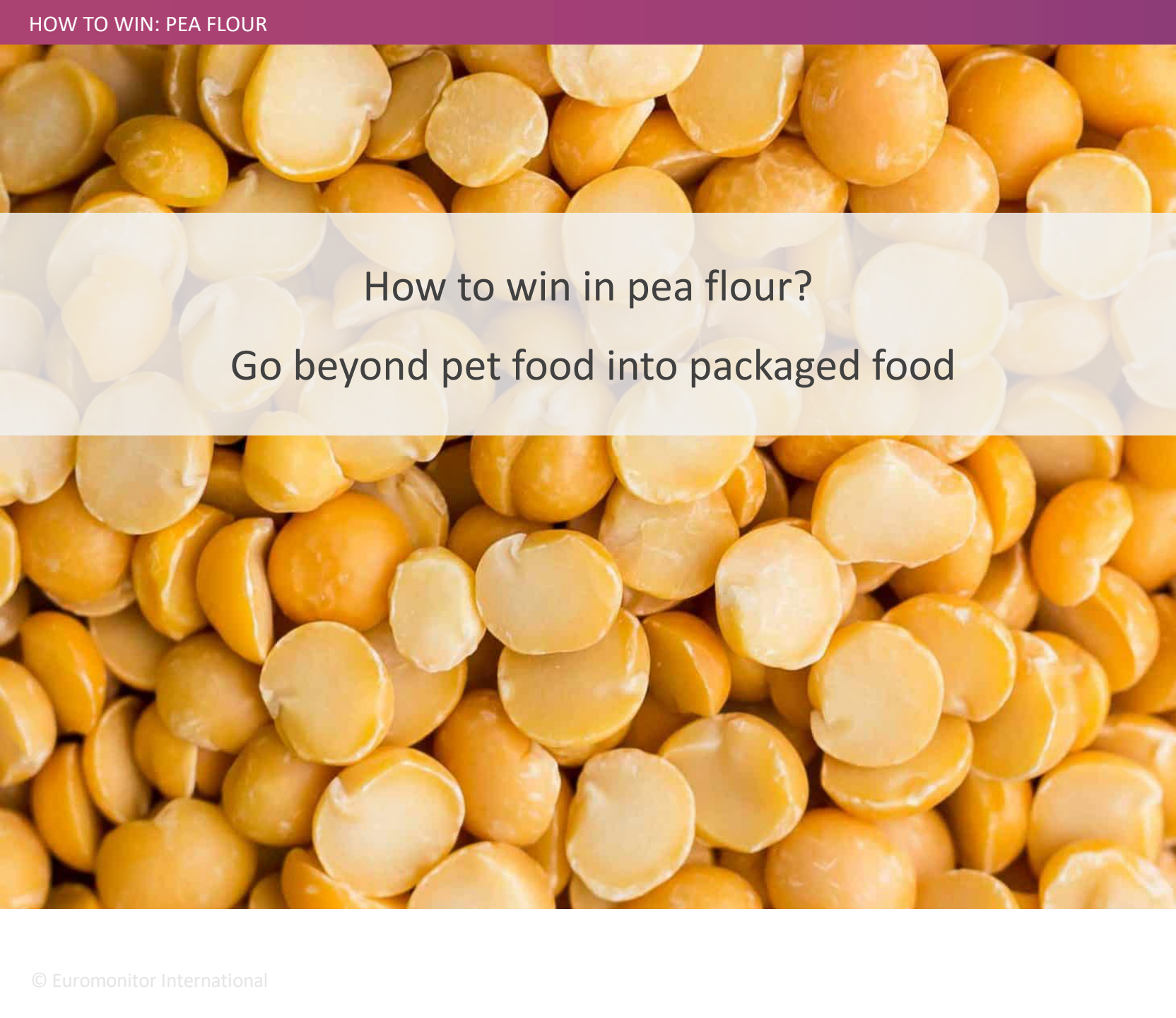


All pulse flour types are expected to register strong growth



2a. How to Win with Pea





How to win in pea flour?

Go beyond pet food into packaged food

86,531

Volume of Pea Flour, 2020 tonnes
(packaged food & pet food)

15.6%

Pea flour growth, CAGR 2020-2023

33.6%

Pea flour share of pulse flour, 2023 %

Drivers

Despite flavor challenges, pea is the “cost-effective workhorse”

Pea flour is prized for its affordability as a plant protein. While there are advancements in flavor reduction, there are some concerns that this will increase the cost of this accessible protein source.

Category performance

Pet food, savory snacks, ready meals lead volume gains

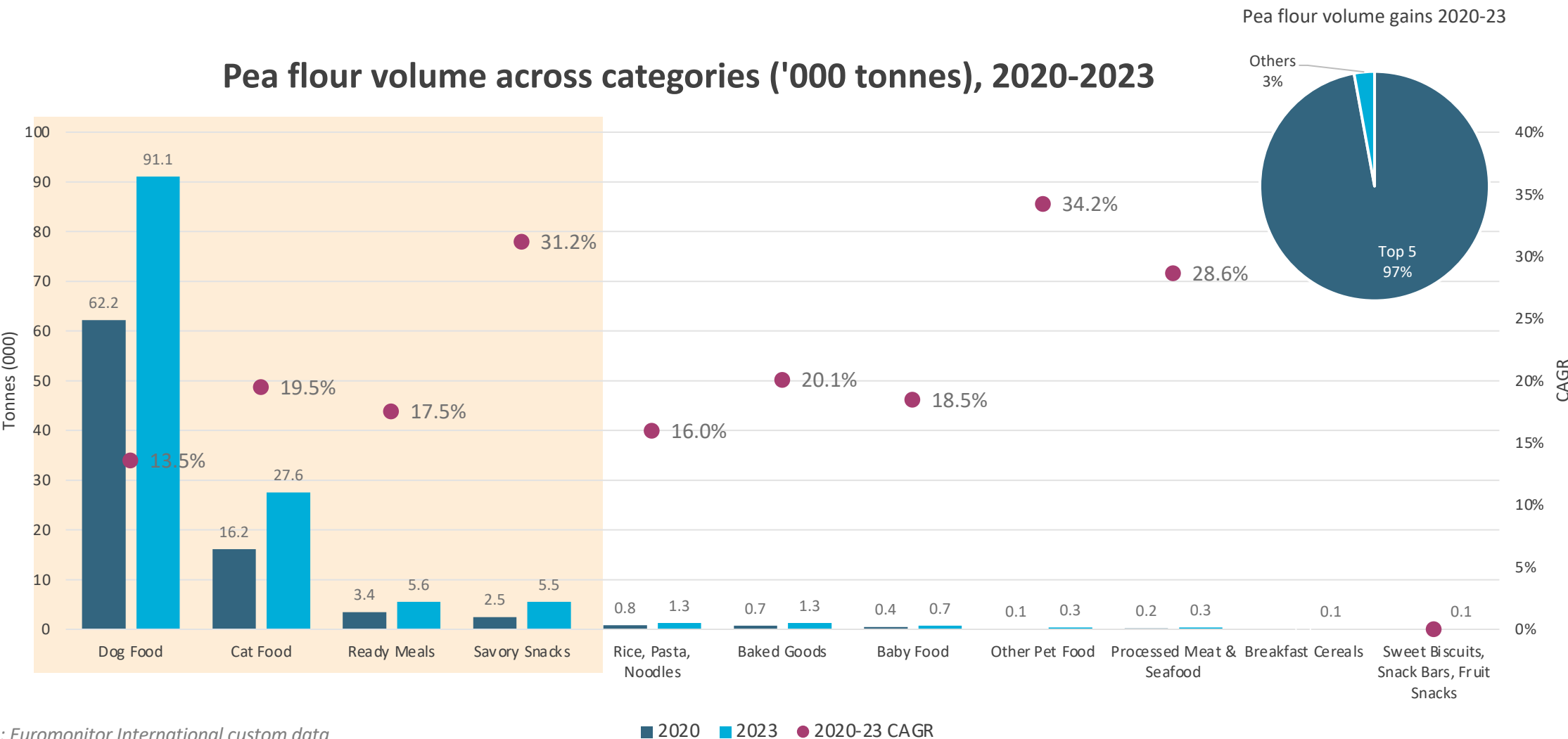
Peas have a strong foundation in pet food, and given the advancements in formulation along with the cost advantage, pea flour is expected to grow significantly in packaged food over the next 3 years, with absolute growth of 47,311 tonnes.

Manufacturer innovations

Players find success in high-flavor, lower-utilization uses

While flavor is still one of the biggest barriers for peas (compared to the much milder chickpea), manufacturers are harnessing their benefits in rich-tasting ready meals and healthy-tasting snacks.

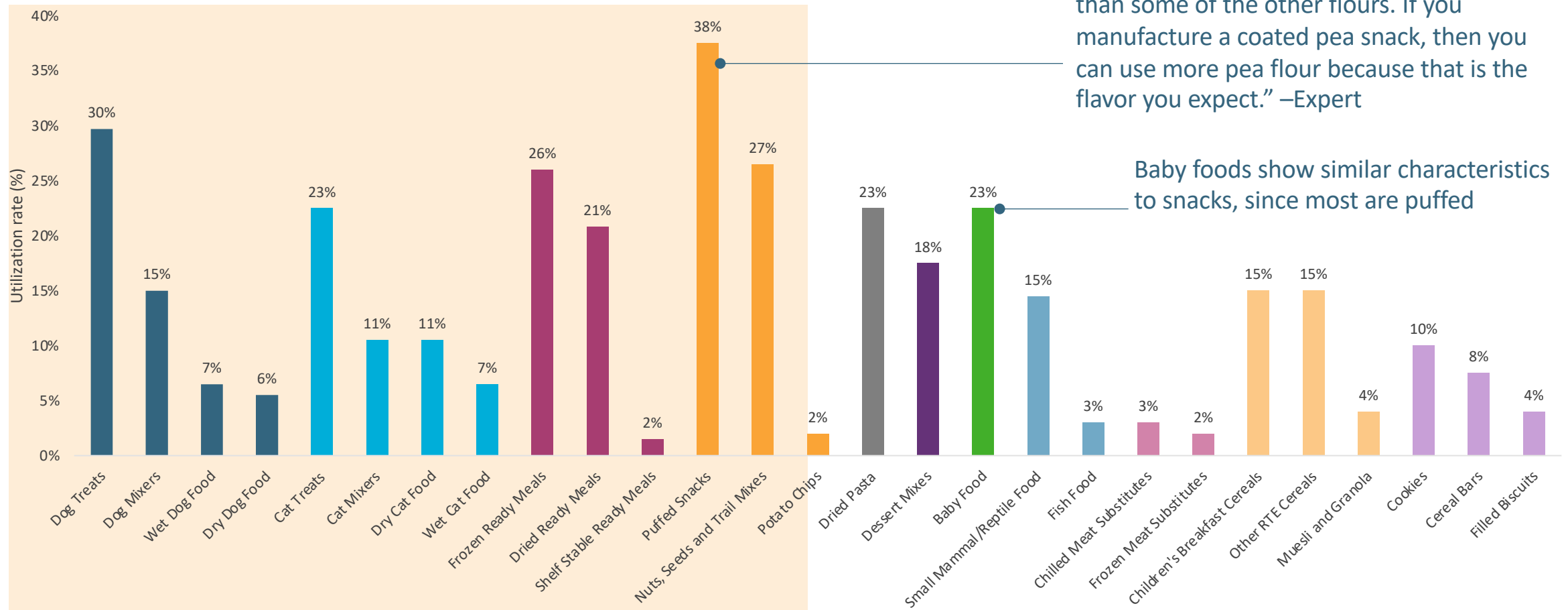
Largest categories in pea flour led by dog food, cat food, savory snacks and ready meals; while pet food dominates, opportunities exist for further growth



Source: Euromonitor International custom data

Within these top categories, puffed snacks, dog treats, and frozen ready meals subcategories lead with inclusion rates; high flavor profiles drive higher inclusion

Pea flour utilization rates by subcategory (%)



Source: Euromonitor International custom data

40,265

Pea Flour Gains
2020-23 Tonnes

Dog & Cat food

3,089

Pea Flour Gains
2020-23 Tonnes

Savory snacks

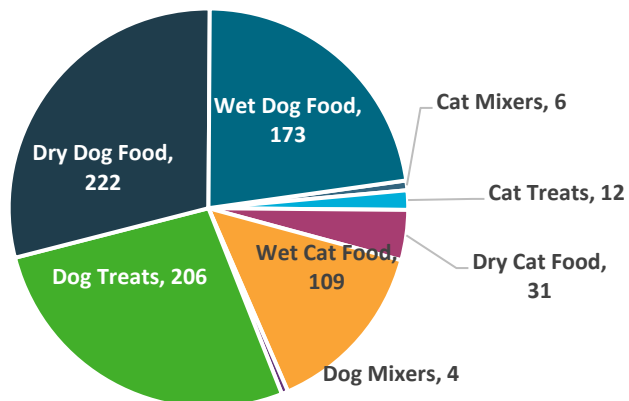
2,136

Pea Flour Gains
2020-23 Tonnes

Ready meals

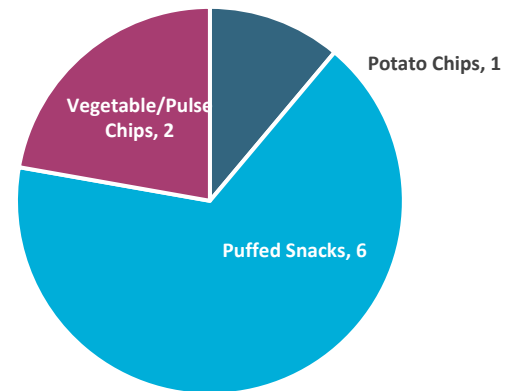
Pea Flour 2020 (tonnes): 78,369

SKUs by subcategory



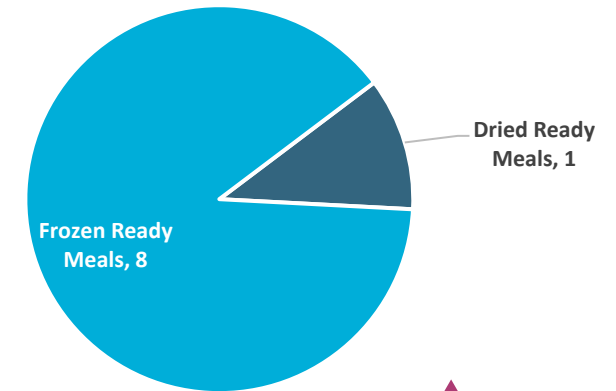
Pea Flour 2020 (tonnes): 2,458

SKUs by subcategory



Pea Flour 2020 (tonnes): 3,430

SKUs by subcategory



Dog Food

Dog food containing pea flour is typically positioned as grain-free. Both yellow peas and green peas are used in dog food, with higher prevalence of yellow peas. In most cases, pea type is not indicated on the product label.

Top brand/manufacturers (SKU)

- | | |
|-----------------------------------|------|
| 1. Blue Buffalo/General Mills Inc | (98) |
| 2. WholeHearted/WholeHearted | (67) |
| 3. Rachael Ray/JM Smucker Co | (59) |
| 4. I & Love & You/I & Love & You | (27) |

Subcategory: **Dog Treats**

Brand/Manufacturer: **Tender & True/Tender & True**

Product name: **Organic Chicken Recipe Jerky Treats**



Organic and animal welfare certifications. Pea flour ranked among top ingredients.

Claims: Grain-free, No corn/No wheat/No soy

Ready Meals

Pea flour is being increasingly used in plant-based ready meals and applications with high protein content. Golden pea and yellow pea flour are finding valuable applications in rich-tasting and color-complementary ready meals, such as macaroni and cheese.

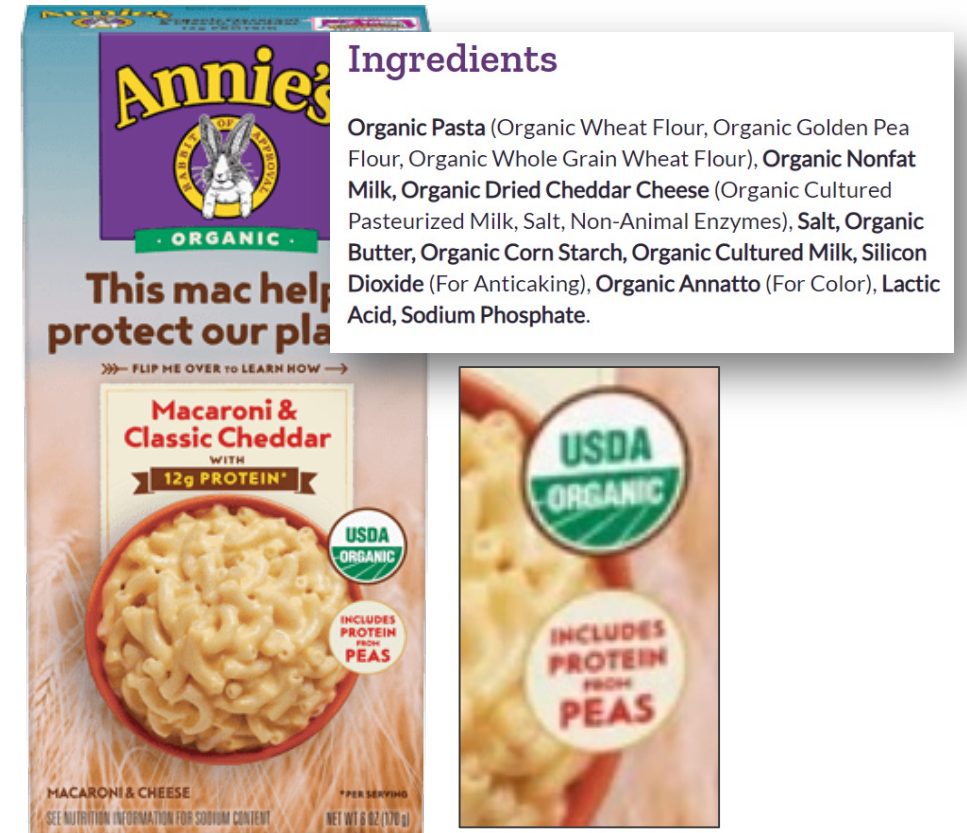
Top brand/manufacturers (SKU)

1. Sweet Earth/Sweet Earth (7)
2. Annie's/General Mills (1)
3. Stouffer's/Nestlé SA (1)

Subcategory: **Dried Ready Meals**

Brand/Manufacturer: **Annie's/General Mills Inc**

Product name: **Organic Mac & Cheese – More Protein**



High protein content, including protein from yellow peas, blended with organic wheat flour.

Claims: 12 g protein, Organic

Savory Snacks

Demand for better-for-you snacks drove the introduction of savory snacks containing pea flour and added flavors. In most products, pea flour is added to corn-based or rice-based snacks to increase protein per serving. These extruded snacks also make up the baby food category, with pea flour taking center stage to associate color with a healthy positioning.

Top brand/manufacturers (SKU)

1. Sensible Portions/Hain Celestial Group (4)
2. Off The Eaten Path/PepsiCo (2)
3. Peeled Snacks/Peeled Snacks (2)
4. Wegmans/Wegmans (1)

Subcategory: **Puffed Snacks**

Brand/Mfg.: **Peeled Snacks/Peeled Snacks**

Product name: **Organic Baked Pea Puffs, Butter & Sea Salt**



Ingredients

Organic Whole Green Pea Flour, Organic Sunflower And/or Safflower Oil, Organic Brown Rice Flour, Butter And Sea Salt Seasoning (organic Rice Flour, Organic Whey, Sea Salt, Organic Butter Powder (organic Butter, Organic Non-fat Dry Milk, Silicon Dioxide, Alpha-tocopherol [to Protect Flavor])), Contains 2% Or Less Of: Organic Sunflower Oil, Natural Flavors), Organic Rice Starch, Organic Rice Bran Extract.

Subcategory: **Baby Food**

Brand/Mfg.: **Happy Baby/Danone**

Product name: **Happy Baby Organic Teethers**

Extruded snacks also make up most of the baby food category



INGREDIENTS: ORGANIC JASMINE RICE FLOUR, ORGANIC TAPIOCA STARCH, ORGANIC SUGAR, ORGANIC GREEN PEA POWDER, ORGANIC SPINACH POWDER, SALT, MIXED TOCOPHEROLS (TO PRESERVE FRESHNESS).

Puffed snacks made with organic whole green pea flour and added natural flavors. Highlights its 4 g of protein per serving

Claims: 1.5 cups of veggies per bag, Gluten-free, Organic

Increased pet ownership = opportunities in pet treats

Pea flour has high incorporation rates in dog treats, and consumption rose during the pandemic

30%

Pea utilization rate in pet treats (top in pet food)

Beyond pet food, seize the opportunity in food applications, particularly snacks

“Extruded snacks is an area that has historically used a lot of corn and potato, so finding good ways of using pulse flours would be a big advantage.” – Miller

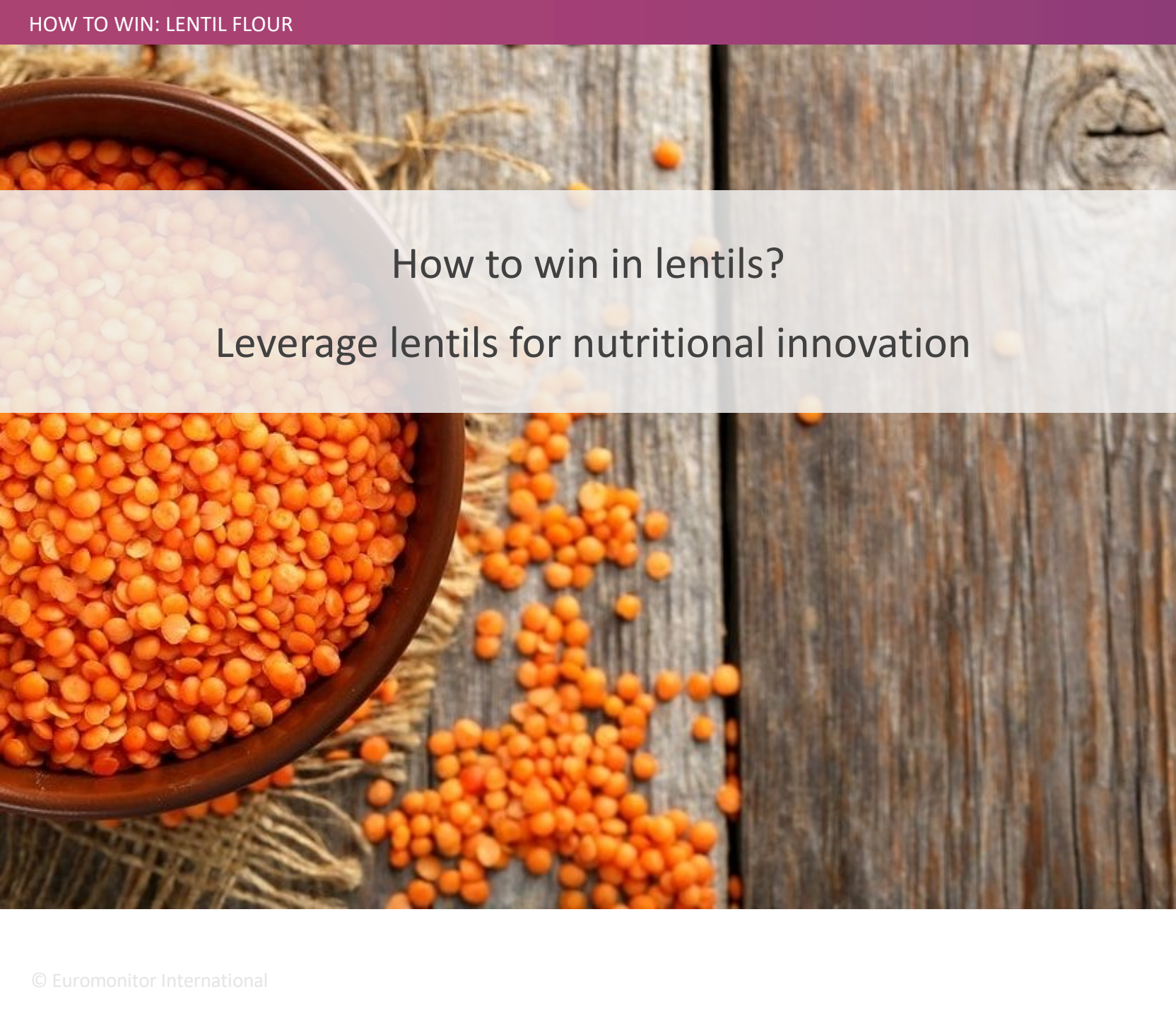
38%

Pea utilization rate in Puffed Snacks (top overall)

Pea flour has unique competitive advantages as a high protein, lower cost pulse flour; look to expand further in pet food, savory snacks, and ready meals

Pea factors External factors	Strengths (prominent in yellow pea) 1. Higher protein, lower fat than chickpea 2. Lower cost than other pulses 3. Yellow pea more color neutral than green pea 4. Highest inclusion rates in snacks and dog treats (+30%)	Weaknesses (prominent in green pea) 1. Strong flavor 2. Strong color
Opportunities 1. Top pea volume in dog food; increase in pet ownership boosted dog treats 2. Savory snacks lead pea growth at 31.2% CAGR*, driven by puffed snacks 3. Ready meals are top 3 in pea volume with a strong 17.5% CAGR	Max-Max Strategy • Continue to focus on dog and cat food, increasing focus on pet treats • Elevate nutrition of neutral color ready meals or pastas with yellow pea flour • Develop better-for-you extruded (puffed) snacks	Max-Min Strategy • Leverage green color to differentiate better-for-you products, particularly puffed snacks and puffed baby food • Align pea flour with stronger flavor profiles and spices in ready meals
Threats 1. De-flavoring technology advancements may drive up prices for pea flour 2. Rice is a top blend for pea flour, which is potentially a barrier to wheat blends 3. Avoidance of legumes in some diets	Min-Max Strategy • Focus on products where cost and protein is more important than flavor • Educate industry on cost advantages of pea flour/wheat blends	Min-Min Strategy • Invest in R&D to optimize pea flavor and functionality, focusing on cost-conscious methods for de-flavoring • Educate on benefits of pea flour and advantages for wheat blends

2b. How to Win with Lentil



How to win in lentils?

Leverage lentils for nutritional innovation

47,738

Volume of Lentil Flour, 2020 tonnes

22.3%

Lentil flour growth, CAGR % 2020-2023

22.0%

Lentil flour share of pulse flour, 2023%

Drivers

Lentils are paving the way to greater acceptance of pulses

Millers recognize that there is a strong supply of lentils and usage can gain more traction in the US.

Category Performance

Wide range of applications, following success of chickpeas

Opportunity for chickpea and lentils to “join forces” and grow the size of major categories together.

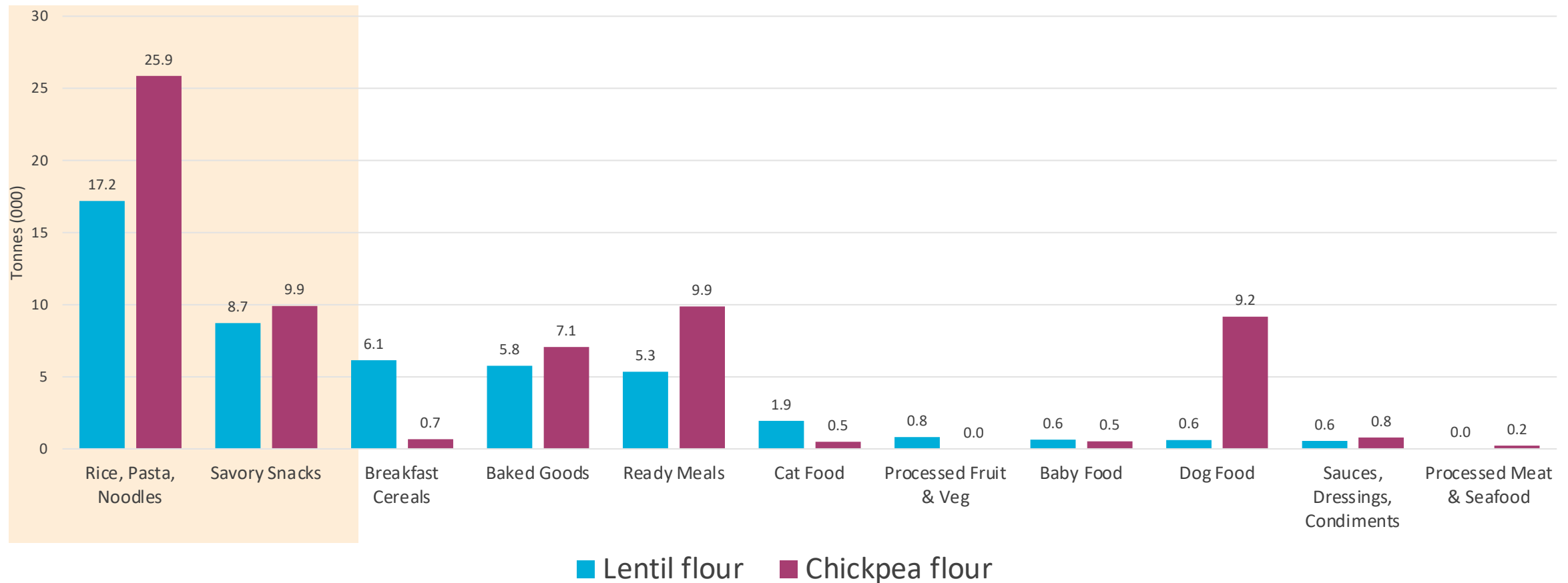
Manufacturer Innovations

Players find success in nutritional innovations

While peas are more prominent in rice flour blends, lentils show early signs of strength in wheat blends, particularly in pasta.

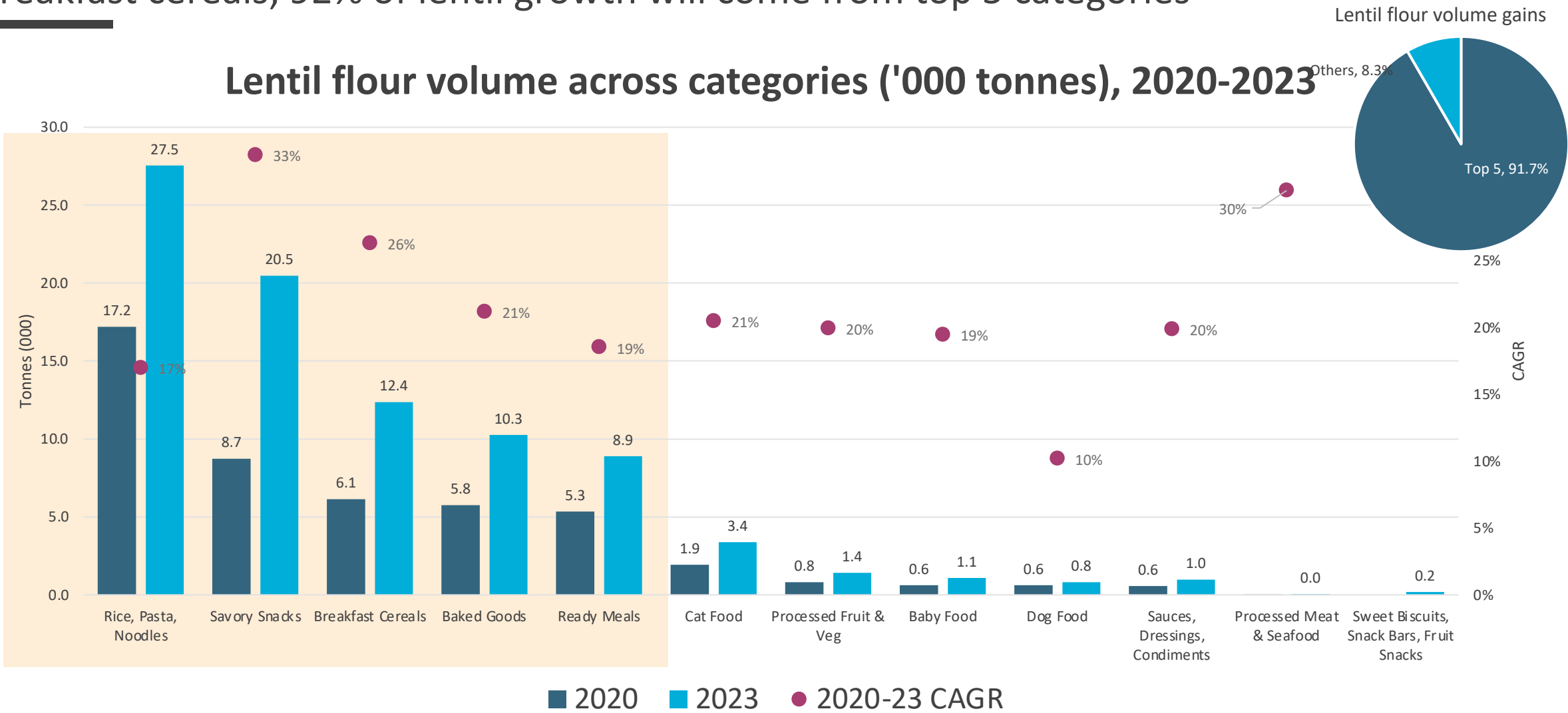
Lentil flour has a similar footprint to chickpea flour, overlapping in many of the same categories, particularly in rice/pasta/noodles and snacks

Lentil and chickpea flour demand by category ('000 tonnes), 2020



Source: Euromonitor International custom data

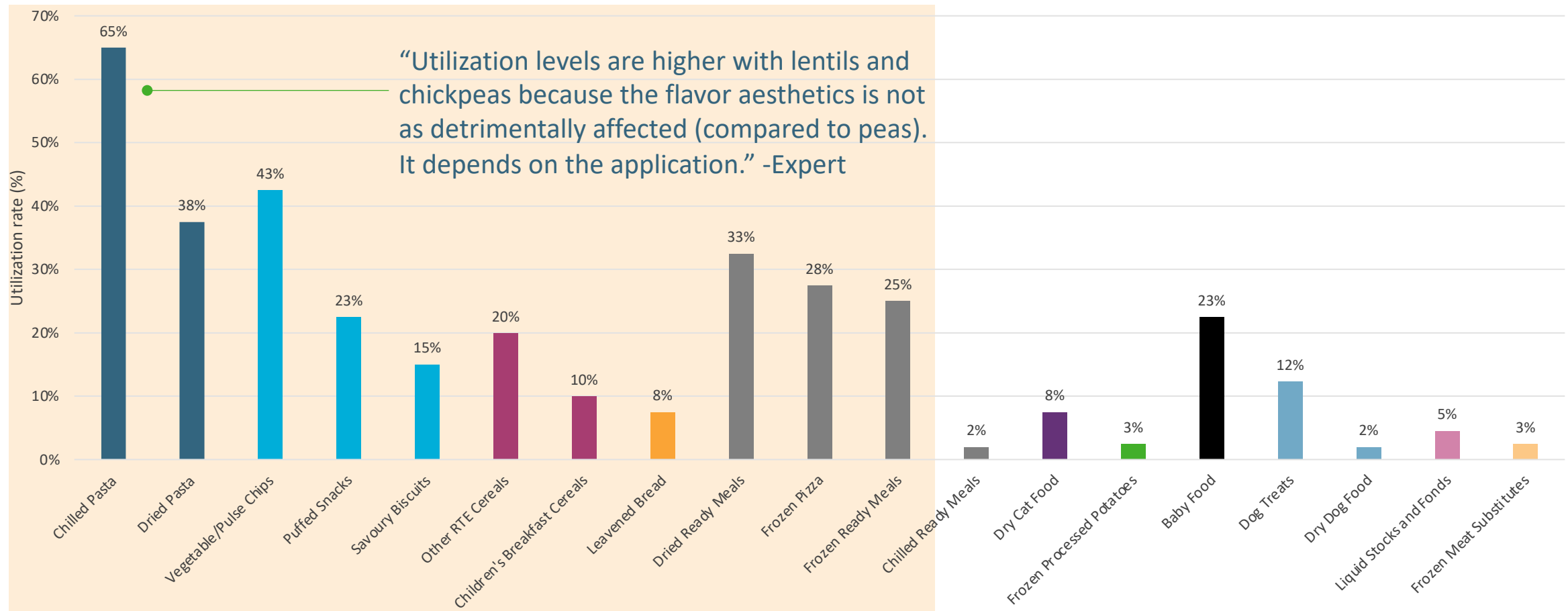
Largest applications for lentil flour include rice/pasta/noodles, savory snacks, breakfast cereals; 92% of lentil growth will come from top 5 categories



Source: Euromonitor International custom data

Within these top categories, chilled pasta, dried pasta, pulse chips, and dried ready meals lead with highest lentil flour inclusion rates (+30%)

Lentil flour utilization rates by subcategory (%)



Source: Euromonitor International custom data

Savory Snacks

Lentil flour has a strong presence in gluten-free savory biscuits (crackers), and growing penetration in vegetable/pulse chips and puffed snacks, positioned as plant-based and high in protein. These puffed snacks are also present in baby food, with pea flour combined with broccoli and other vegetables.

Top brand/manufacturers (SKU)

1. Enjoy Life/Kühne KG (7)
2. Breton/Dare Foods (7)
3. From The Ground Up/From The Ground Up (5)
4. The Daily Crave/The Daily Crave (3)

Subcategory: **Vegetable, Pulse Chips**

Brand/Mfg.: **Enjoy Life/Kühne KG**

Product name: **Enjoy Life Lentil Chips, Sea Salt**



INGREDIENTS: Lentil Chip (Lentil Flour, Potato Starch, Salt, Sunflower Oil, Turmeric, Paprika), Safflower and/or Sunflower Oil, Sea Salt, Rosemary Extract.

Positioned as plant-based, better-for-you lentil chips, with 40% less fat than the leading potato chip.

Claims: Allergy friendly, Gluten-free, High-protein

Subcategory: **Baby Food**

Brand/Mfg.: **Sprout/Sprout Foods**

Product name: **Sprout Organic Curlz**



Extruded/puffed snacks make up most of the baby food category

Rice/Pasta/Noodles

Growing numbers of brands are launching lentil-based dried pasta positioned as gluten-free and highlighting its content as a source of plant-based protein in combination with other blended flours.

Subcategory: **Dried Pasta**

Brand/Manufacturer: **Ancient Harvest/Ancient Harvest**

Product name: **Green Lentil Spaghetti**



Nutrition Facts			
about 4 servings per container			
Serving Size	2oz (55g)		
Calories	200	360	
Total Fat	1g 1%	1.5g 2%	
Saturated Fat	0g 0%	0g 0%	
Trans Fat	0g	0g	
Cholesterol	0mg 0%	0mg 0%	
Sodium	0mg 0%	0mg 0%	
Total Carbohydrate	37g 13%	67g 24%	
Dietary Fiber	2g 7%	4g 14%	
Total Sugars	1g	2g	
Incl. Added Sugars	0g 0%	0g 0%	
Protein	14g	25g	
Vitamin D	0mcg 0%	0mcg 0%	
Calcium	13mg 2%	23mg 2%	
Iron	4mg 20%	8mg 45%	
Potassium	514mg 10%	935mg 20%	

INGREDIENTS:
Green Lentil Flour,
Organic Quinoa Flour

DISTRIBUTED BY:
Ancient Harvest
Golden, CO 80403



For recipes and more,
visit ancientharvest.com.

Top brand/manufacturers (SKU)

1. Barilla/Barilla Holding (20)
2. Birds Eye/ConAgra Brands (16)
3. Bionaturae/Isalpa Srl (4)
4. Ancient Harvest/Ancient Harvest (3)

Lentil pasta made with green lentil flour and quinoa flour marketed as plant-based and high in protein.

Claims: Gluten-free, 25 g protein, Plant-based protein

Breakfast Cereals

Rapid growth/penetration of lentil flour in breakfast cereals, typically blended with rice, corn and oat flour. Products are also marketed as gluten-free. The natural color of lentils aligns particularly well here, increasing the fun (yet natural) experience for breakfast products.

Top brand/manufacturers (SKU)

1. Kashi/Kellogg Co (12)
2. Wegmans/Wegmans (1)

Subcategory: **Children's Breakfast Cereals**

Brand/Manufacturer: **Kashi/ConAgra Brands**

Product name: **Berry Super**



Ingredients: Whole grain yellow corn flour*, cane sugar*, whole oat flour*, red lentil flour*, pea protein*, expeller pressed sunflower oil*, oat fiber*, salt, raspberry powder*, strawberry powder*, natural flavors*, vegetable juice for color* (carrot, radish, red cabbage), baking soda, citric acid, mixed tocopherols (vitamin E) for freshness.
*Organic

Organic breakfast cereal for children, made with corn flour, oat flour, and red lentil flour.

Claims: Organic, Super Foods, 4 g protein, 4 g fiber.

Ready Meals

Introduction of pasta-based ready meals in frozen and dried formats by large food manufacturer ConAgra Brands. Category also includes a growing number of Indian food ready meals and frozen pizza made with lentil flour.

Top brand/manufacturers (SKU)

1. Birds Eye/ConAgra Brands (12)
2. Wegmans/Wegmans (2)
3. Simple Truth Organic/Simple Truth (1)

Subcategory: **Frozen Ready Meals**

Brand/Manufacturer: **Birds Eye/ConAgra Brands**

Product name: **Meatless Beef Lasagna**



INGREDIENTS: WATER, LENTIL ZUCCHINI PASTA (LENTIL FLOUR, ZUCCHINI, WATER), TOMATO PASTE, COTTAGE CHEESE (CULTURED PASTEURIZED GRADE A SKIM MILK), CRUSHED TOMATOES IN PUREE (DICED TOMATOES, TOMATO PUREE, CITRIC ACID), PART-SKIM MOZZARELLA CHEESE (PASTEURIZED PART-SKIM MILK, SKIM MILK, SALT, CULTURES, ENZYMES), GARDEIN® BEEFLESS CRUMBLE (WATER, SOY PROTEIN CONCENTRATE, CARAMEL COLOR, CANOLA OIL, SUGAR, YEAST EXTRACT, ONION POWDER, SALT, GARLIC POWDER, NATURAL FLAVORS, SEA SALT, SUGAR, SPICES), ONIONS, PARMESAN CHEESE (PASTEURIZED MILK, CHEESE CULTURES, SALT, ENZYMES), LESS THAN 2% OF: MODIFIED CORN STARCH, SOY SAUCE (WATER, WHEAT, SOYBEANS, SALT, ALCOHOL, VINEGAR, LACTIC ACID), SUGAR, CANOLA OIL, SALT, MUSHROOM POWDER, GARLIC, SPICES, OLIVE OIL.
CONTAINS: MILK, SOY, WHEAT.

Lasagna frozen ready meal made with lentil flour and meat substitute.

Claims: Plant-based, Meatless beef

Snacks win again, showing strong prospects for lentils

Chickpea's historic footprint in savory snacks and the high utilization rate in vegetable/pulse snacks signals strong growth potential for lentil flour

43%

Lentil utilization rate in vegetable/pulse chips (2nd highest rate)

Leverage pasta innovation as a highway for lentils

Chilled pasta maximizes utilization rate for lentils, while popularity of dried pasta increases opportunities for wheat/lentil blends

65%

Lentil utilization rate in chilled pasta (top overall)

38%

Lentil utilization rate in dried pasta (3rd highest)

Lentil flour has many strengths to leverage and differentiate itself as a unique protein-powered ingredient to grow categories; it is not another chickpea

Lentil factors External factors	Strengths 1. High protein, low fat, high antioxidants 2. Easier to mill and blend than chickpeas 3. Longer shelf life (less fat) than chickpeas 4. High inclusion rates (>60% in snacks)	Weaknesses 1. Stronger flavor than chickpea flour (but not as strong as pea flour) 2. Not as color-neutral as chickpea flour
Opportunities 1. Top lentil volume in rice/pasta/noodles, driven by dried and chilled formats 2. Savory snacks lead lentil growth at 33% CAGR*, driven by pulse chips 3. Breakfast cereals are top 3 in lentil volume and surging at 26% CAGR	Max-Max Strategy • Enhance nutritional profile of pastas with red and green lentil blends • Develop better-for-you extruded snacks, including baby food snacks • Elevate breakfast cereals with higher protein profiles, for adults and children	Max-Min Strategy • Align complementary flavor/color combinations to boost acceptance of pulses in high-growth categories (e.g., tomato/red lentil pasta, spinach/green lentil) • Differentiate in snacks and breakfast cereals by emphasizing all-natural colors, particularly in children's products
Threats 1. Chickpea growing in similar categories 2. Gluten-free interest may pose barriers to wheat/grain blends with lentil flour 3. Avoidance of legumes in some diets	Min-Max Strategy • Design alternatives to chickpea flour products (lower fat, higher protein) • Focus on extrusion to maximize benefits	Min-Min Strategy • Invest in R&D to optimize on functionality • Educate on benefits of lentil flour and target health-conscious consumers with healthy alternatives for maximizing protein

11,762

Lentil Flour Gains
2020-23 Tonnes

Savory snacks

10,340

Lentil Flour Gains
2020-23 Tonnes

Rice/pasta/noodles

6,228

Lentil Flour Gains
2020-23 Tonnes

Breakfast cereals

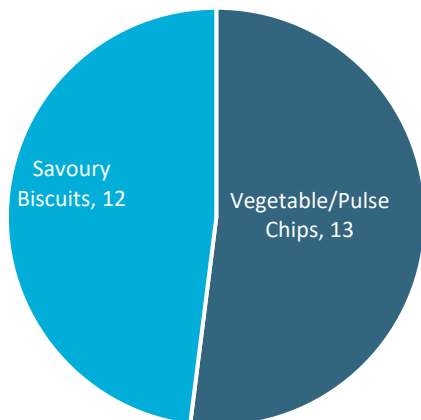
3,552

Lentil Flour Gains
2020-23 Tonnes

Ready meals

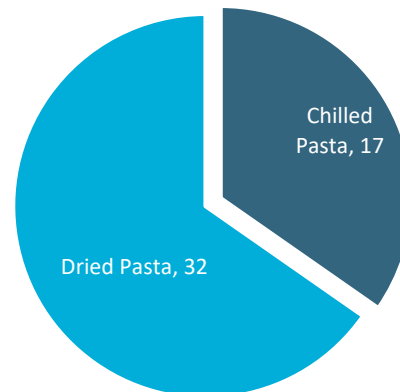
Lentil 2020 (tonnes): 8,723

SKUs by subcategory



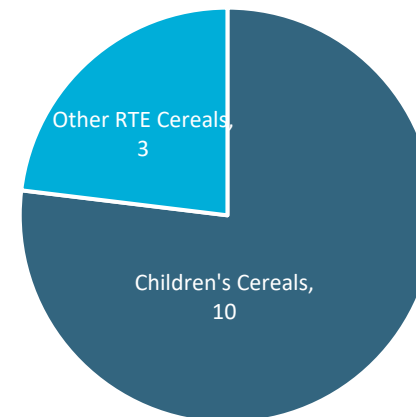
Lentil 2020 (tonnes): 17,201

SKUs by subcategory



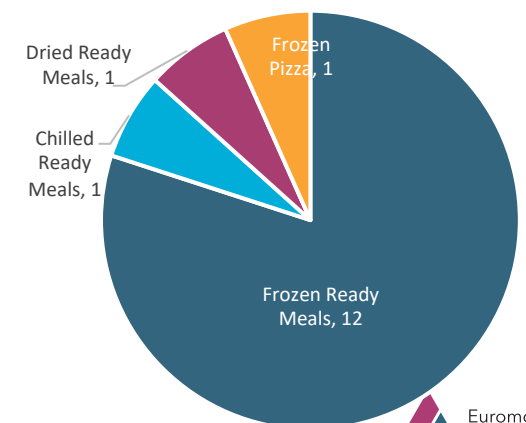
Lentil 2020 (tonnes): 6,133

SKUs by subcategory



Lentil 2020 (tonnes): 5,336

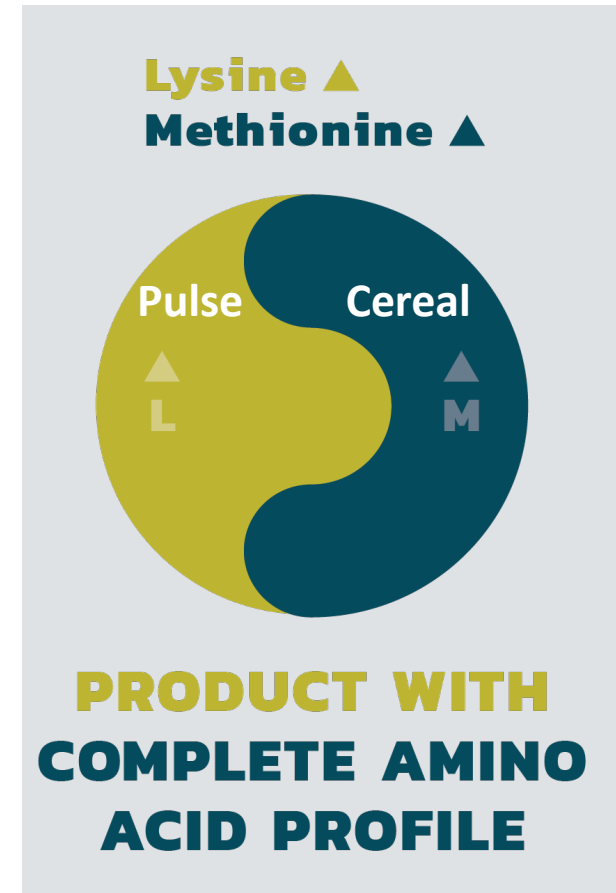
SKUs by subcategory



3. Pulse-Cereal Flour Blends

Win-win opportunities for pulse-cereal flour blends

- Improved nutritional profile
- Complementary amino acids
- Better texture and dough handling properties
- Increased protein
- Healthier labels
- Revitalize growth of wheat/ complementary flours



By type, lentils and chickpeas have the highest propensity to be used in blends, mainly with rice

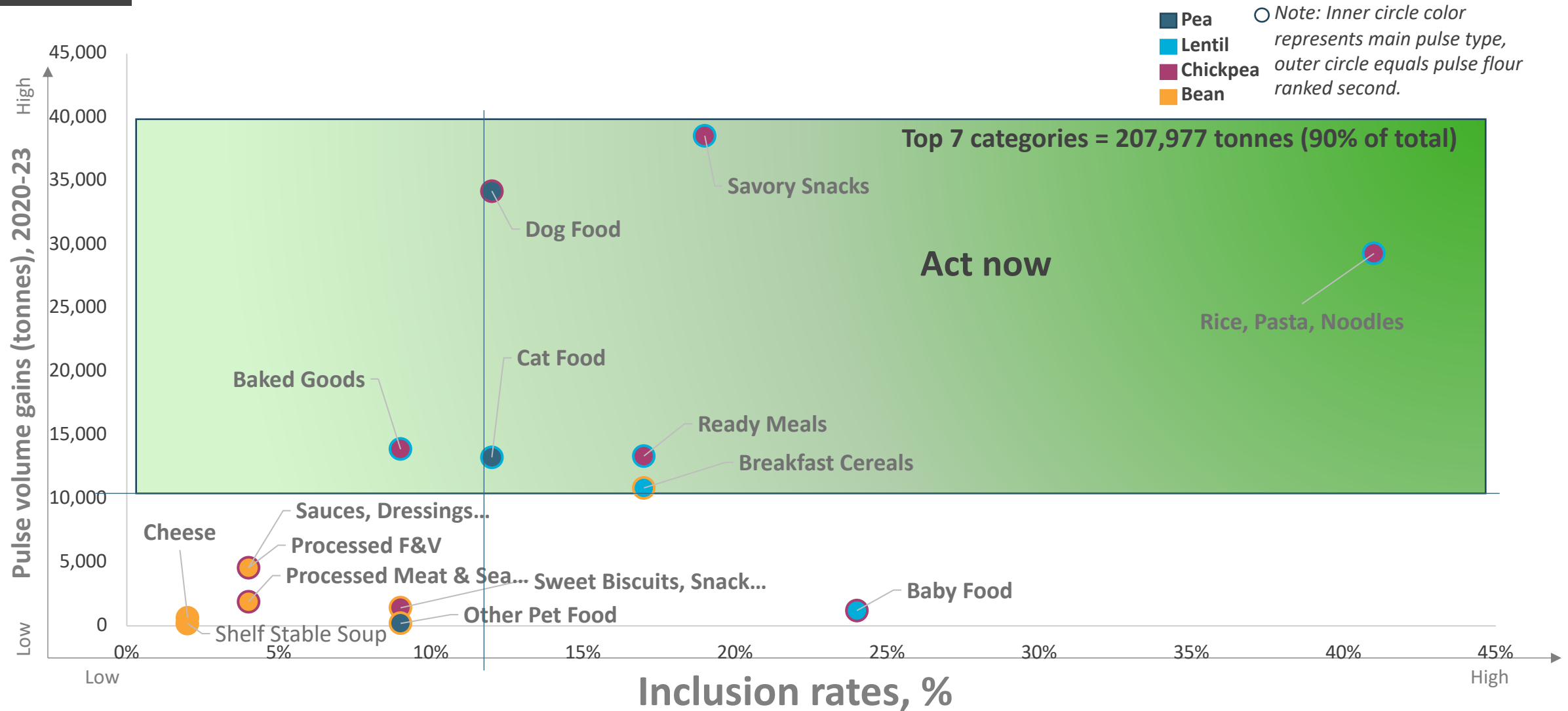
Pea flour is less likely to be blended with other flours; in such cases, they are typically blended with tapioca, potato, and flaxseed flour, driven by usage in the pet food industry. In contrast, lentils are widely used in blends, mainly with rice and potato flour.

Pulse Flours	Pulse Blends (SKUs)	% of Pulse SKUs	Wheat	Corn	Rice	Oat	Tapioca	Barley	Potato	Flaxseed
Pea	250	28%	4%	6%	17%	12%	28%	12%	20%	21%
Lentil	97	71%	16%	6%	29%	8%	3%	24%	20%	0%
Chickpea	161	61%	7%	3%	43%	6%	3%	5%	22%	1%
Bean	36	43%	8%	44%	17%	0%	0%	0%	0%	0%

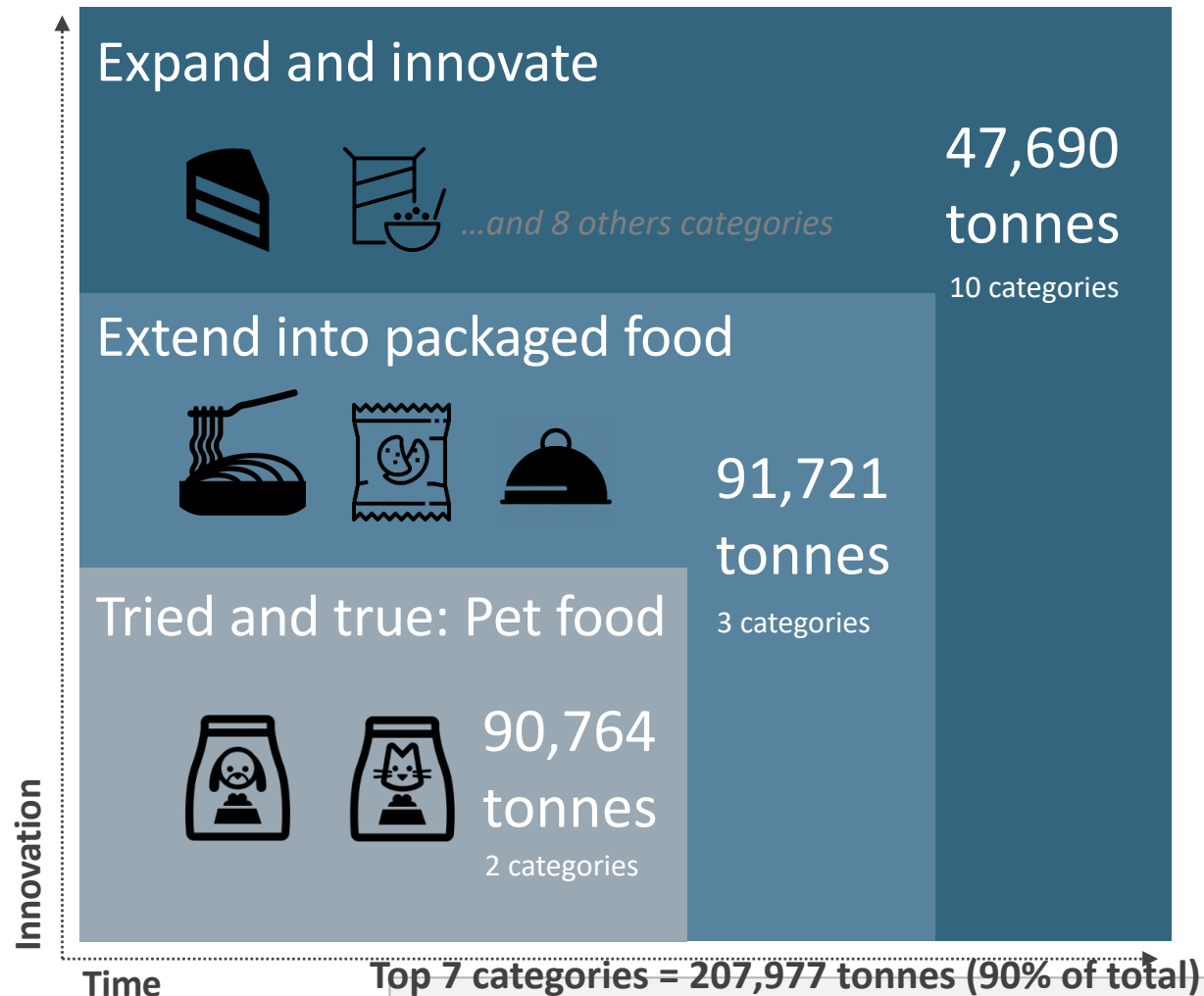
Source: Euromonitor International custom data, VIA – Note: Grid reflects multiple flour types by product/SKU

3. Summary: Prioritizing Growth Strategy for Pulse Flours

High inclusion rates plus high-volume growth reveal sweet spot for maximizing pulse flour; largest food categories led by chickpeas, strong potential for lentils and peas

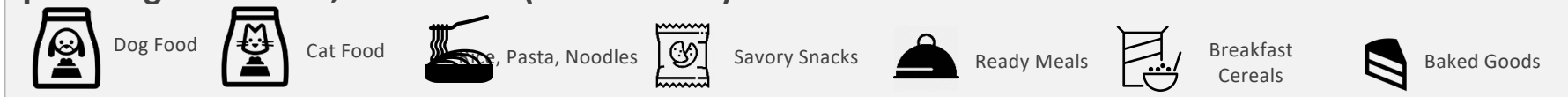


Pulse flour is well entrenched in pet food, but to capitalize on growth and benefits of pulses, diversification is a must, leveraging the benefits of pea and lentil flour



Source: Euromonitor
custom data, 2020 sizes

© Euromonitor International



1

Horizon 1: Tried and true pea flour applications

These are the categories with the highest penetration of pulse flour, dog and cat food. Pea flour is valued here for its low-cost and high-protein benefits. Desired outcomes for pulse flours and functionality are generally known in this category, driving continued volumes and further standardization.

2

Horizon 2: Extend pea and lentil flour into packaged food

Pasta, savory snacks, and ready meals have benefited from acceptance and usage of chickpea flour. Lentil flour and pea flour can mutually grow these traditionally grain-based applications and complement wheat flour and other flours. Lentil flour is valued for its high-protein, low-fat nutritional profile compared to chickpea flour, while pea flour aligns well into foods where the flavor can be easily masked.

3

Horizon 3: Continue to expand and innovate

Functionality and taste barriers may exist across the other categories. However, lentils appear to have an advantage over peas when it comes to flavor and readiness for innovative applications. Lentils are already gaining ground in baked goods and breakfast cereals, improving nutritional profiles across these emerging applications.

Where to focus

Lead with high-volume, high-inclusion categories

Dog food, rice/pasta/noodles, and savory snacks are expected to account for the majority (over 60%) of gains in pulse flour volumes over the next three years.

The industry also has an opportunity to grow its footprint by tapping into the unique benefits of lentil and pea flour to expand into higher-value food categories.

How to Win – Peas

Go beyond pet food into packaged food

Pet food, particularly dog food, was the initial success story for pulse millers, given the lower cost of pea flour and its high protein benefits.

Opportunity exists to go beyond pet food into rice/pasta/noodles and savory snacks to grow the portfolio of cost-competitive options in food.

How to win – Lentils

Leverage lentils for nutritional innovation

Compared to chickpea flour, lentil flour has higher protein content and lower fat content. Compared to pea flour, lentil flour may have flavor advantages.

Opportunity exists to increase the number of applications for lentil flour, intersecting with and expanding in key categories with chickpeas and improving the nutritional profile of blends.

Drivers

Plant-based proteins among top growth drivers

Even though wheat, corn, and pulses are all plant-based, consumers link pulse flours with a good plant-based protein.

Protein and fiber content, as well as their amino acid profile, are identified by millers and food manufacturers as top attributes.

Food manufacturers are also interested in the capability of pulse flour to help meet targets of reducing greenhouse gas emissions.

Category performance

Dog food, dried pasta, and savory snacks lead value gains

The three largest applications account for 63% of total pulse flour demand, and incorporation of pulse flours is expected to grow over 20% in the next three years.

Leverage pea flour to expand beyond dog food into applications such as savory snacks and ready meals where flavor may be masked, and leverage the high protein and low fat content of lentils to drive expansion in categories where chickpeas have found success.

Competition & Blends

Pulses growing against declines in wheat/corn; blends rising

Promote blending of pulse flours with wheat and corn to expand success in rice/pasta/noodles, savory snacks, breakfast cereals and ready meal categories to enhance nutrition.

In the dog food category, grain-free materials are more likely to be blended with pulses, while rice flours remain the preferred choice for blending in baked goods.

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