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The Food Foundation

UNLOCKING THE POTENTIAL OF BEAN, PULSE AND LEGUME CULTIVATION IN THE UK:

What's needed to boost production of British beans?

ABOUT THE FOOD FOUNDATION

The Food Foundation is an independent charity working to address challenges in the food system in the interests of the UK public. Working at the interface between academia and policymakers (parliamentarians, civil servants, local authorities, business leaders and investors) we use a wide range of approaches to make change happen including events, publications, media stories, social media campaigns and multistakeholder partnerships. We also work directly with citizens to ensure their lived experience is reflected in our policy proposals. We work with many partners on a range of different thematic areas, working closely with academics to generate evidence and campaigners who can drive change. We are independent of all political parties and business, and are not limited by a single issue or special interest.

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EXECUTIVE SUMMARY

KEY FINDINGS AND RECOMMENDATIONS

- **Consumption of beans and pulses (beans, lentils, chickpeas and other legumes) in the UK is low:** two thirds of people eat less than one portion a week and we would need to eat almost seven times more to align with the planetary health diet (The Food Foundation, 2025).

- **At the same time, while the UK can and does grow beans and pulses, production is dominated by two types:** faba beans (otherwise known as field beans or broad beans) and peas. The UK grows about 800,000 tonnes of beans annually, but most of these are exported or used as animal feed (Defra, 2024).

- **Conversely, we import 500,000 tonnes of beans each year - worth a potential £586 million annually to UK producers (The Food Foundation, 2025).**

- **This is partly driven by a mismatch between the beans and pulses we produce and the ones we eat (supply and demand).** While faba beans are widely eaten globally, they are far from a staple in British diets - despite the UK being the world's third-largest producer of these beans. Instead, we import most of the beans we eat, such as haricot beans (the main ingredient in baked beans).

- **Moreover, the production of beans and pulses in the UK is significantly constrained by a number of challenges,** such as high agronomic risk for farmers driven by increasingly variable weather patterns, reduced access to agricultural inputs, underinvestment in breeding and agronomy, and weak knowledge exchange between growers.

- **These challenges are compounded by market and supply chain issues** such as low and volatile prices, tight buyer specifications for beans and pulses grown for food, limited processing capacity to get them from farm to shelf, and the need for large price premiums to offset the production risk of growing novel/exotic crops.

- **There is also significant policy misalignment,** with government stewardship schemes such as the Sustainable Farming Incentive (SFI) schemes effectively disincentivising planting of harvestable legumes as break crops, and the absence of national protein or horticulture strategies to coordinate efforts to support the sector.

- **However, there are exciting opportunities to expand the production of beans, pulses and other legumes in the UK with strong appetite from across different stakeholder groups for action.** Key levers to support the sector include; building consumer demand and end markets to stimulate production, upscaling funding, investing in primary and secondary processing to close the 'missing middle', increasing R&D and farmer knowledge exchange, and improving access to agricultural inputs.

- Although there is growing interest in this area — there are a range of current and recent academic, industry and third sector research and development projects looking at bean and pulse production in the UK — **there are limited initiatives researching and/or addressing issues associated with linking production and consumption along the supply chain, or broader value chains.**

- Growing more beans, pulses and other legumes in the UK offers potential economic, environmental and health benefits, with public procurement a critical and promising lever for incentivising change towards public settings procuring and serving more UK grown beans, thus better linking supply and demand.

INTRODUCTION

Despite the key role beans and pulses (beans, lentils, chickpeas and other legumes) can play in production practices and diets that are both healthy and sustainable, we neither consume nor produce as many as we could in the UK, with huge potential to boost both production and consumption and better connect the two.

The Food Foundation's National Lottery-funded ***Bang in Some Beans*** national campaign aims to catalyse a fundamental shift in perceptions of beans and ultimately to double their consumption in the UK by 2028.

Alongside this consumption-focused campaign, we wanted to understand how much of this increase in consumption could be sourced from British farmers and growers, what benefits this may bring for the British horticulture and arable sectors, and how increasing domestic production of beans could help mitigate the environmental impacts associated with current farming and supply chain practices.

We neither consume nor produce as many beans as we could in the UK, with huge potential to boost both production and consumption and better connect the two.

Between October 2025 and January 2026 we conducted desk-based research and interviewed 18 experts in the sector, including farmers and growers, business owners, researchers, trade unions and associations, and civil servants to build up a picture of the current barriers and opportunities for the domestic pulse and legume sector.

This briefing summarises our findings and sets out recommendations for what's needed to better support farmers to boost production of British beans: a win-win-win for public health, climate, and nature.

REGENERATIVE AGRICULTURE

More sustainable production practices such as regenerative agriculture approaches could support the increased production of beans. Due to their natural nitrogen-fixing effects (vital for soil fertility and essential for plant growth), it is common practice in regenerative farming approaches to integrate legumes like clover and sainfoin into fertility building leys and add harvestable pulse crops like peas and beans to their rotations. This reduces the need for artificial fertilisers, improves soil health, and can provide cost savings for farmers. It also helps to protect them from unstable and increasing global fertiliser costs; recent market changes due to geopolitical turbulence in the Middle East have led to a 30–40% rise in prices for some fertilisers (Defra, 2026), increasing pressure on farmers and contributing to higher retail prices.

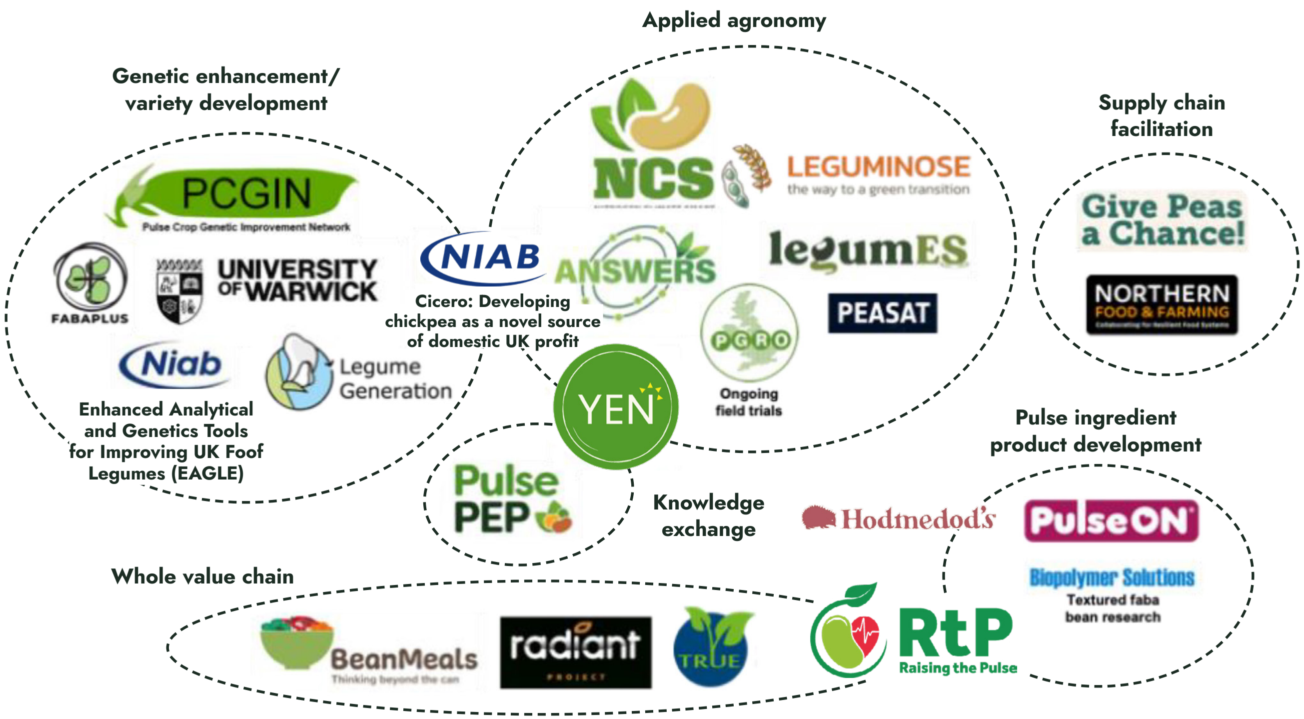
WHAT'S ALREADY BEAN HAPPENING?

Overview of research and development projects looking at UK bean, pulse and legume production

Numerous projects and initiatives are already conducting research into many of the issues facing the sector, as shown in Figure 1.

Most current and recent projects are focused on production issues, including 5 genetic enhancement/ variety development projects, 11 projects looking at agronomy practices and 1 on agronomy knowledge exchange. There are relatively few initiatives (2) researching and/or addressing issues associated with the supply chain between production and consumption, and 4 looking at broader value chains. 3 projects are researching pulse ingredient development.

FIGURE 1: **OVERVIEW OF CURRENT/RECENT UK PULSE AND LEGUME PRODUCTION PROJECTS AND INITIATIVES**



WHICH BEANS, LEGUMES AND PULSES DO WE GROW IN THE UK?

Traditionally grown crops:

Faba beans (*Vicia faba*), also known as field beans or broad beans

Dried peas (*Pisum sativum/ Lathyrus oleraceus*)

Vining peas (*Pisum sativum/ Lathyrus oleraceus*)

Fresh bean varieties (*Phaseolus vulgaris; Phaseolus coccineus*)

Novel/exotic crops:

Chickpeas (*Cicer arietinum*)

Phaseolus beans ("common beans") (*Phaseolus vulgaris*)

Lentils (*Lens culinaris*)

KEY CHALLENGES

We wanted to understand the issues associated with bean, pulse and other legume crops that are traditionally grown in the UK (faba beans, dried peas, vining peas and various fresh beans), as well as 'novel' or more 'exotic' crops such as chickpeas, lentils and Phaseolus beans ("common beans"), which are currently imported in large volumes.

The current challenges for traditionally grown crops identified are as follows;

TRADITIONALLY GROWN CROPS - *faba beans, dried peas, vining peas and various fresh beans*

AGRONOMY ISSUES	Challenging conditions – increasing variability in weather patterns driven by climate change, especially affecting sensitive crops such as peas
	Decreasing range of agricultural inputs (fertilisers and pesticides) available to farmers, increasing production risks. This is particularly affecting pulses and legumes due to the small size of the sector, which disincentivises investment
	Underinvestment in pulse and legume breeding and challenges for commercial breeders
	Underinvestment in agronomy research and knowledge exchange
MARKET AND SUPPLY CHAIN ISSUES	Limited UK markets for whole pulses and legumes
	Specification requirements which UK farmers can struggle to meet
	Government environmental stewardship schemes incentivise legumes as cover crops rather than as harvestable pulses for selling
	A lack of processing capacity within the UK for beans (the 'missing middle')
INSTITUTIONAL AND SYSTEMIC ISSUES	Absence of a national protein policy, strategy or action plan
	Absence of a horticulture strategy or action plan for England
	A lack of policy coordination within Defra - pulses fall between different directorates (arable and horticulture)
	Loss of visibility and a distinct voice for the pulse sector within Westminster since the merger of PulsesUK into the trade association AIC (Agricultural Industrial Confederation)

The current key challenges associated with increasing production of novel/exotic bean crops within the UK identified from our research are as follows;

NOVEL/EXOTIC CROPS - *Chickpeas, lentils and Phaseolus beans ("common beans")*
Novel combinable pulse crop varieties (which are available to arable farmers & developed for planting at field scale) aren't sufficiently adapted to the UK's climate, requiring longer, drier growing seasons
Significant price premiums are needed to mitigate against the production risks and variability in annual crop yields of these more novel bean types
The market for higher priced beans and pulses is limited. For most consumers, the higher retail price of novel UK crops versus the relatively cheap price of imported beans is a major barrier, restricting the market for these crops

The supply and demand mismatch problem

There is broad recognition among stakeholders that the bean crops traditionally grown in the UK are not currently the varieties that UK consumers are eating. This mismatch between supply and demand is one that urgently needs to be tackled to create a market for UK growers. Downstream businesses and other food system stakeholders (for example public procurers and chefs) need to build consumer demand and familiarity with those beans that grow well in the UK. For example, the UK's leading baked bean brand imports approximately 50,000 tonnes of haricot beans (a variety of Phaseolus bean) every year from North America (University of Warwick, 2023).

In contrast, despite the UK's standing as the world's third-largest producer of faba beans in 2023, most are exported - faba beans make up at least 36% of UK bean exports, with Egypt the leading destination (United Nations, 2024). Other popular beans consumed in the UK, including kidney beans, chickpeas and lentils, are challenging to grow in the UK at large commercial scales, and are currently almost all exclusively imported.

OPPORTUNITIES
Unlocking the UK's pulse potential

Despite these challenges, our research also identified an array of opportunities to support the cultivation of beans, pulses and other legumes in the UK. These are as follows;

1 Growing demand and tangible market opportunities

- **Growing consumer demand for and familiarity with uk-grown beans and pulses** was seen as a significant opportunity by many experts interviewed. One of the current challenges, for faba beans at least, is not about insufficient supply but lack of demand. The UK exports faba beans to regions such as North Africa and the Middle East where they are included in popular dishes like Ful Medames. The UK should look to take inspiration from other global cuisines in better utilising faba beans. This needs support from those shaping food trends (such as chefs and influencers) as well as action from downstream food businesses (caterers, retailers and so on) to include faba beans and faba-based ingredients in New Product Development and into commonly eaten foods; a 'health by stealth' approach.

- **Public sector procurement** has huge potential to grow demand for UK-grown beans and pulses. Two recent pilot projects aiming to get more UK grown dried peas into school meals – Give Peas a Chance in Aberdeenshire and BeanMeals in Leicestershire – have demonstrated the potential of such approaches:

  - The opportunity to create demand for local organic split green peas in Aberdeenshire through school food procurement has been explored by Bridging the Gap's Give Peas a Chance project. The project team worked with school caterers in Aberdeen to develop child-friendly recipes that incorporated the peas, and with local educators to get children on board, proving that locally produced healthy and sustainable food can be served and eaten in schools. It demonstrated the real potential to create new markets for Scottish organic dried split peas for human consumption. It also provided support for local growers and producers and benefitted the environment by supporting sustainable farming systems. Its success led to an extension of the funding and more local authorities coming on board, leading to 350 more schools and nurseries accessing pea-based dishes.

  - The BeanMeals project also trialled beans in school lunches, serving UK-grown Godiva & Capulet beans in six schools in Leicestershire. It concluded that despite the lack of supportive policy and significant challenges around the school food system in England, there is still significant scope to bring UK-grown beans and local sustainably sourced food into school meals (BeanMeals consortium, 2025).

- **Supporting/expanding UK pulse-based ingredients** is another opportunity and a potentially more accessible means of increasing bean and pulse consumption. The University of Reading's successful Raising the Pulse project and others have explored the potential of enhancing bread with faba bean flour and are currently running extended consumer testing. Cost is still a barrier for faba bean flour, due to the small volumes being produced. Further opportunities to use ingredients derived from UK peas and faba beans within food manufacturing processes include use of starch and protein isolates derived through fractionation, and pea flours are also used within the production of milk alternatives.

- **Broadening buyer specifications**. A proportion of peas do not meet ever-increasing buyer specification windows around colour, size, cooking time etc. Many faba beans are also rejected as suitable for human consumption because of insect damage. However, several experts we interviewed argued that the small holes left behind by insects render the beans no less useful for producing pulse-based ingredients, with the holes an aesthetic risk than a food safety one once beans have been cooked and processed. There seems to be an opportunity for processors to establish a range of food grade specification requirements, particularly around insect damage.[1]

[1] *Faba beans face a particular challenge with the bruchid beetle pest, which affect crop quality and crops with more than 2% bruchid beetle damage currently do not meet the specification for human consumption in the UK.*

2 Building/supporting supply chains

- **The 'missing middle'**. Scaling up UK bean production will require better investment in processing infrastructure. Research by BeanMeals has shown that the UK has a shortage of facilities for cleaning, storing, canning, and preparing beans (3Keel, 2024). Without this "missing middle", farmers face a harder route to market and consumers have fewer opportunities to buy British grown beans.

- **A lack of initiatives connecting producers to consumers**. There is currently a research

gap around the link between production and consumption – specifically limited research on "middle-chain actors" or on the role of food providers (retailers, wholesalers) in increasing consumption (Lane *et al*., 2025). Identifying pathways to address the "missing middle" between production and consumption has been one focus of the BeanMeals project.

- **There is a need to address regional processing bottlenecks and growing capacity** and an opportunity to invest in more regional facilities to reduce transportation costs around the UK. For example, a recent review in Scotland found that there are no primary processing facilities for beans in the country (Moxey, A & Tregear, A., 2026).

- **Further investment in secondary processing** to move beyond the primary processing of dried beans and peas (harvesting, cleaning, sorting, and drying (or hulling) raw beans) towards transforming these cleaned, raw beans into final products, such as roasting, grinding, canning, or making bean flour is vital to broaden the accessibility and appeal of pulses.

- **There is also a need for broader co-creation around supply and value chains more broadly**, bringing supply chain actors together to build new collaborations and problem solve bottlenecks. Supply chain facilitators or "collaborative capacity builders" can play a valuable role in these processes and NGOs and the third sector are potentially well-positioned to play this role - the Give Peas a Chance project is an example of this.

- **Using public food procurement to incentivise UK legume production and provide local routes to market**. The UK public sector spends an estimated £5 billion annually on food and catering services, serving schools, hospitals, prisons, and the armed forces (FixOurFood, 2024). With the Government having committed to 50% of this spend being directed towards food that is produced locally and in a more sustainable way in its manifesto, there are huge opportunities for public food procurers to source and serve more British grown beans. The Food Foundation are currently planning three place-based trials intending to better understand what it would take to scale up approaches which aim to link production to local supply chains, supporting the transition to more regenerative farming and health objectives.

3 **Addressing barriers around inputs**

- There is an opportunity to address current barriers around agrochemical and plant breeding materials, giving growers better "tools" to manage pulse agronomy challenges. For agrochemicals, this would mainly entail streamlining and reducing the costs of registering and re-registering individual fertilisers and pesticides. This would need to ensure that strong health and environmental standards are maintained.
- There are also opportunities for better collaboration with input approval procedures in other markets to reduce costs, such as using data that's been generated in other countries where there is already an approval instead of paying for a new approval in the UK.
- Importantly, there are also opportunities to encourage the uptake of intercropping (growing two or more crop species simultaneously in the same area) by farmers to enable input-free/low input management of pests, diseases and weeds – for example, the *Leguminose* project, a programme across nine countries which aims to understand agronomy issues across legume crops, has shown that intercropping pulses with cereal crops typically results in a lower incidence of each of these challenges compared to monocropping. Current barriers for enabling this include knowledge exchange and the requirement of additional machinery to separate the harvested mix.

4 **Increasing investment in breeding for context, applied agronomy research and knowledge exchange**

- Increased research and development funding for the sector would support the development of solutions to mitigate against some of the challenges outlined, specifically around: reducing agronomic (soil management and crop production) risk; developing UK traits for genetic improvements (including disease resistance, developing earlier maturity for unpredictable UK autumns, improved lodging resistance, and higher yield stability); pulse crop diversification; and added-value processing (processing methods can be used to economically significantly increase the protein concentration of the faba bean) (PGRO, 2018).
- Supporting the mainstreaming of intercropping by directing public farming support towards the practice, investing in value chains for intercropped products, and strengthening farming advisory services and peer-to-peer learning opportunities (Bozsogi and Leray, 2025).
- For commercial plant breeders, there is a specific forthcoming opportunity to improve trading conditions through ongoing EU-UK reset processes (Hopkins, 2025). This may allow UK breeders access to the Common Catalogue of registered plant varieties again.

5 Building political momentum

- There is an opportunity to build political momentum around UK production of beans, pulses and other legumes, securing ministerial support and political commitments though a protein strategy/action plan for the UK that includes pulses and pulse-based products.
- Defra have recently committed to a Horticulture Sector Growth plan in which measures to drive up production of beans and legumes should be included.
- Close alignment with the Government Food Strategy will be key, which aims to both build stronger, more resilient supply chains and support healthier and more environmentally sustainable food sales. Beans offer a route into supporting both of these outcomes.

CANADA'S THRIVING PULSES SECTOR

Canada has reaped significant returns on public investment in the pulse sector, with spending not just increasing output, but securing global market dominance. The Canadian government invested $11.1 million in 2018 (matched by $7.2 million from industry, total $18 million) to support pulse innovation and market diversification, which led to pulse production reaching 7.1 million tonnes (above the 5-year average of 6.5 million tonnes) and exports reaching $3.4 billion (Government of Canada, 2018).

It is now one of the largest producers of pulses (including lentils, peas, chickpeas, dry beans and faba beans), exporting around 5.5 million tonnes of pulses annually. Pulses play a vital role in Canada's agri-food sector and broader economy, contributing $6.3 billion to Canada's economy in 2021 (Pulse Canada, no date).

Its growth and competitiveness are attributed to a coordinated effort particularly in government funded research to address pulse industry priorities, including genetic improvement, reducing agronomic constraints in production, expanding use of pulse ingredients in foods, and highlighting stakeholder awareness of the health benefits of pulse consumption.

Production incentives and the risks

What's the issue?

Many of the growers and sector experts we spoke to highlighted the weak commercial case for growing beans and pulses. Most acknowledged that a market-driven reward for growing pulse crops would be most sustainable, however all felt that some form of additional government payment was needed to account for the risks associated with the crops, and to incentivise planting.

However, there are risks around subsidies; without onward supply chain work on building demand, it could cause market distortion. A subsidy may also be difficult to apply, as farmers may not know when they plant whether their crop will qualify as human or livestock grade.

Some stakeholders pointed to the government environmental stewardship schemes – specifically the Sustainable Farming Incentive (SFI), a payment for adopting practices that produce environmental benefits – as a major cause of decreasing pulse crop areas in recent years. The SFI scheme acted as a disincentive to the production of beans and pulses, encouraging growing beans and pulses only as cover crops, rather than harvestable beans for selling and eating. The area of field beans in the UK in 2024 was 37% lower than in 2023, with production falling by 33% and a decreased value of £51 million, reflecting the lower production (Defra, 2025).

Arable farmers could apply between 2023 and March 2025 for the "Legume fallow" scheme and receive a fixed rate of £593/ha for planting a legume fallow break crop within their rotations (Defra, 2024). However, the Legume fallow payment does not allow farmers to harvest a crop, either for animal feed or human consumption, and has, in many cases, been perceived as a less risky, more attractive proposition. This has effectively disincentivised the planting of harvested legumes as break crops and resulted in an overall decline in pulse cultivation in recent years,

In the current SFI from June 2026, the Legume fallow payment has been reduced from £593/ha to £532/ha, with Defra recognising the payment made it too attractive to take highly productive land out of food production (Defra, 2026). It's not yet clear whether this will reduce uptake or encourage farmers to switch to harvestable beans.

Baroness Batters' Farm Profitability Review (2025) called for the incorporation of incentives for protein crops within the revised SFI scheme, with specific mention of pulses and circular protein crops like peas and beans.

How could SFI adjustments help and what are the risks?

Options for adjusting SFI could include:

- An SFI option that allows a legume crop to be harvested, similar to the current "Low input cereals" option could help to de-risk pulse and legume production.
- An SFI option that supports a full rotation, including both a fertility-building ley phase and harvested pulse phases – this would gain the biggest wins in driving down synthetic nitrogen use, while helping to de-risk production of British beans and pulses.

Importantly though, a harvestable-legume payment should not displace existing nature-recovery SFI spend as the current Environmental Land Management (ELM) budget is already insufficient to meet statutory targets for climate, nature recovery and water quality. Any payment should be achieved through additional budget or savings from reduced legume fallow uptake.

It must also be accompanied by demand side investment - growing demand and improving supply chains - so more British grown beans and pulses are going into supply chains for people to buy and eat.

Overall, careful consideration is required in this area and there is a balance to strike between encouraging the production of healthy food domestically and maintaining our commitments to payments for environmental goods - any interventions to boost production of beans and pulses shouldn't be at the cost of our environmental commitments.

WHAT DID GROWERS AND EXPERTS TELL US ABOUT CURRENT UK PRODUCTION OF BEANS?

"*The active ingredients approved for pea and bean seed treatment are very limited and do not cover the full spectrum of disease risk… It is a vicious circle, the agrochemical industry is reluctant to invest in peas and beans in the UK or Europe because the volume grown is so small, so the sector receives comparatively little investment. Without the investment the risks are greater and risk is a disincentive for growers to grow them."* ROGER VICKERS, CHIEF EXECUTIVE, PGRO

"*What we want to see is more investment in breeding varieties that are specifically adapted to our maritime climate, more resilient to disease."* ALASTAIR HEINRICH, POLICY ADVISER (COMBINABLE CROPS), NFU

"*The amount of money out there for legume research is minute in comparison to major crops."* ROGER VICKERS, PGRO

"*It's not the lack of desire of people wanting to grow these crops, it's more the market."* ANDREW HOWARD, DIRECTOR, BOCKHANGER FARMS

"*I think the farming will come; farmers will follow if it becomes essentially economically viable to grow them. [Faba beans are] a really good break crop, they're great for the soil, there is nothing that can be said that's bad for them that I've come across."* ADAM PALMER, CO-FOUNDER AND DIRECTOR, THE HONEST BEAN CO

"*The reality is that we do grow a lot of pulse crops already. We're exporting 150 to 200 odd thousand tonnes of [faba] beans to North Africa and West Asia, and we could be eating more of those. So really the starting point is demonstrating demand – that's where the real gap is. There are farmers who are growing pulses already and who would be very happy to sell into a UK human consumption market but it's just not big enough."* JOSIAH MELDRUM, CO-FOUNDER AND DIRECTOR, HODMEDOD'S

"*It can't just be about selling dried beans. We have to do something with them, to reduce those barriers to consumption… there's a lot of talk in industry about how to pull this together in terms of bean processing… The really interesting part is taking it from a dried bean all the way to a product that is either ready to eat or can be used as an ingredient within something else…I think this is what we're short of in the UK… It just needs the right people with the right investment."* ADAM PALMER, CO-FOUNDER AND DIRECTOR, THE HONEST BEAN CO

"*What if there was a payment that incentivised the production of crops that were broadly a public good in terms of a nutritional benefit? Could there be a way of designing a payment to say if you're going to grow pulses we recognise that they're good for diet, good for health, we could pay you a small premium for human consumption quality?"* JOSIAH MELDRUM, CO-FOUNDER AND DIRECTOR, HODMEDOD'S

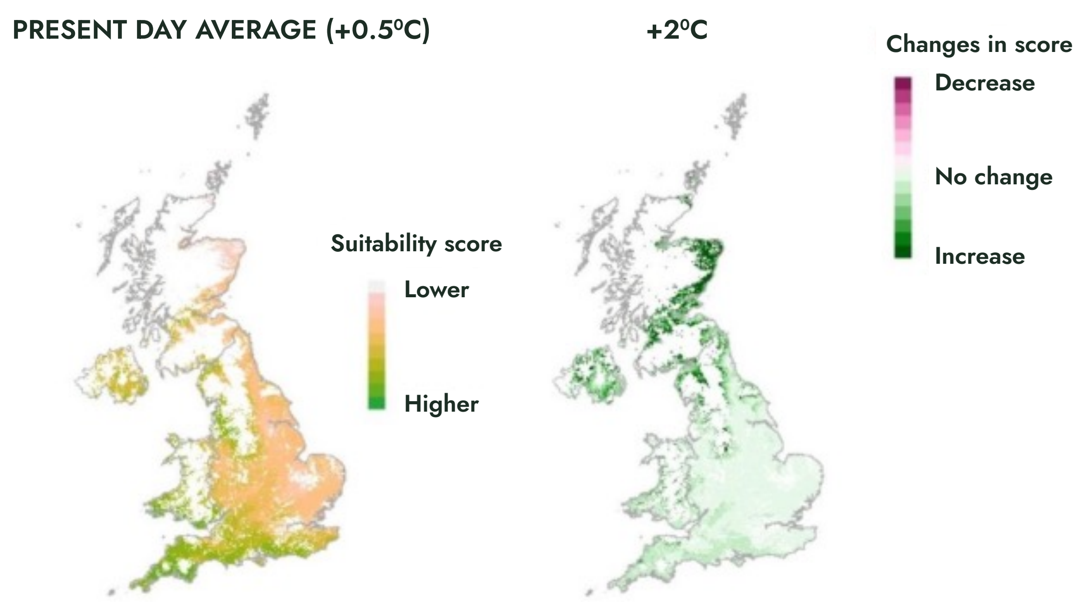
CLIMATE CHANGE AND BEANS

Research suggests climate conditions may become more favourable for crops not currently grown widely in the UK, including many beans and pulses e.g. chickpeas, lentils, cow peas, soy and broad beans (Redhead *et al.*, 2025). For example, The Climate Change Committee's recent report forecasts that chickpeas will be become viable in the south of the UK due to warmer average temperatures (CCC, 2026) and modelling at the Centre for Ecology and Hydrology, has suggested that warmer temperatures will provide substantial increases in suitability for chickpeas as shown in Figure 2 (Redhead *et al.*, 2025).

However, it should be noted that this assessment doesn't take into account other factors which are ultimately likely be more restrictive on crop viability than long-term average climatic shifts, such as volatile weather patterns and extreme weather events associated with warming temperatures, climate tipping points, ecological collapse, soil degradation, water scarcity along with many other detrimental and unpredictable effects of a warming climate.

FIGURE 2:

PROJECTIONS FOR SUITABILITY OF CHICKPEA UNDER 2°C DEGREE WARMING SCENARIO (Redhead *et al.*, 2025)



FEED VS. FOOD?

- Should the European Union introduce the long-awaited EU deforestation regulation (EUDR) — which aims to restrict the sourcing of commodities from areas at risk of deforestation — and the UK follow with the government's similar legislation for the UK, it is likely we would see restrictions on some imported soybeans sourced from areas of deforestation. This would potentially prompt greater demand for UK pulses for animal feed as a substitute to soy.

- While UK pulse production is limited by the availability of land in the UK, and could therefore not fully displace current feed imports given our current high levels of meat consumption, demands for non-soy or reduced-soy animal feed may nonetheless create a huge market for UK pulses (The Landworker's Alliance *et al.*, 2023)

- Growing the feed market for UK pulses would likely have a spillover effect on pulses for human consumption given that these markets overlap. Many farmers producing pulses target higher value human consumption markets, but any crop or proportion of crop which does not meet quality specifications is diverted to animal feed. Growing the animal feed market would thus support pulse production overall, increasing the back-up market for pulses targeted at human consumption.

- However, market demand for beans and pulses would also need to grow - many farmers who are currently growing pulses for animal feed would like to sell into a UK market for human consumption but are constrained by a lack of demand and routes to market for UK beans.

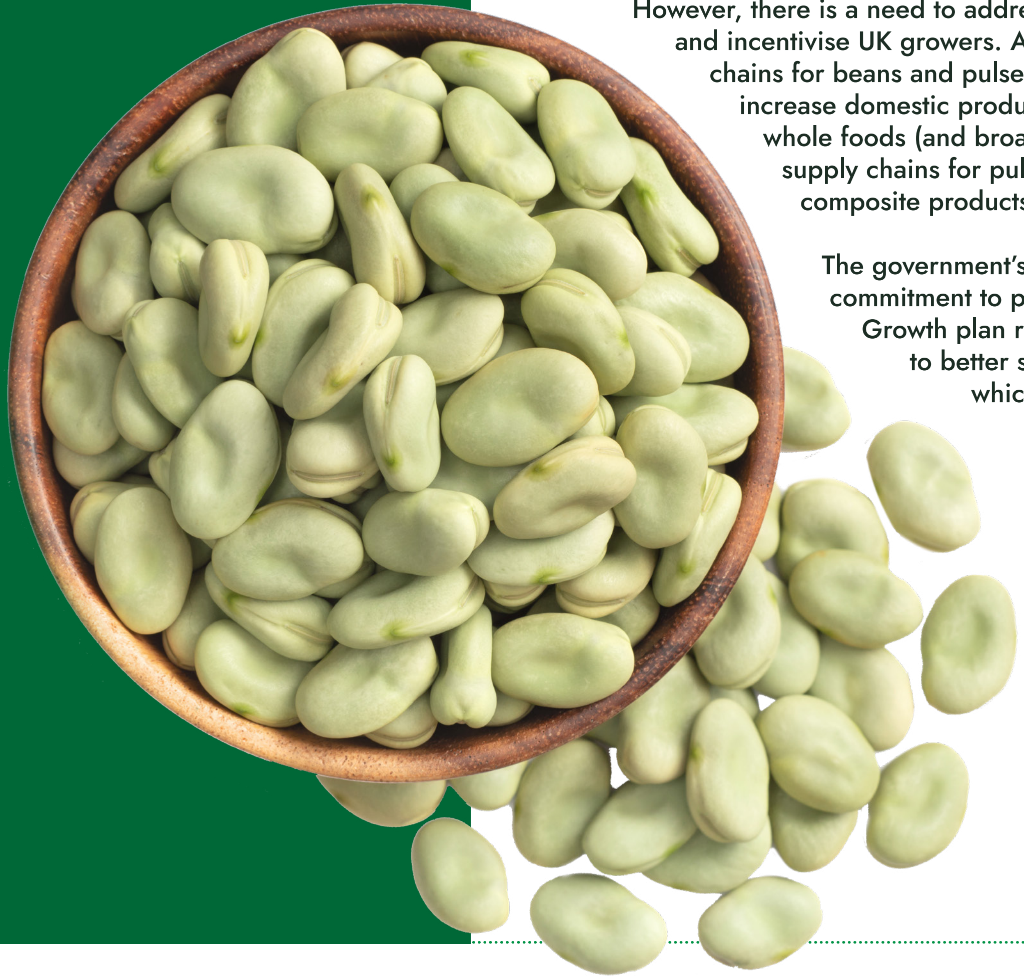
CONCLUSION

With the right infrastructure and incentives, the UK could see more beans grown, processed, and eaten closer to home.

This would offer potential economic, environmental and health benefits, particularly if public sector procurement can be used as a lever for incentivising change - increasing demand by procuring and serving more UK grown beans in public settings.

However, there is a need to address these specific production-focused concerns to better support and incentivise UK growers. Additionally, developing tangible new markets and building supply chains for beans and pulses currently grown in the UK are key opportunities to support and increase domestic production. This should involve growing demand for these crops as whole foods (and broadening buyer specifications), as well as growing markets and supply chains for pulse-based ingredients for use within food manufacturing and in composite products.

The government's current food strategy and commitment to produce a Horticulture Sector Growth plan represent critical opportunities to better support UK growers of beans which should be seized on.



Developing tangible new markets and building supply chains for beans currently grown in the UK are key opportunities to support and increase domestic production

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