

USA Pulses September 2025

Impact of Tariffs and Trade Barriers on U.S. Pulse & Ingredient Exports to the European Union

Background and Strategic Context

USA Pulses is the leading voice for U.S. pulse growers, processors, exporters, ingredient suppliers, and food companies. Our mission is to promote the use of American-grown dry peas, lentils, chickpeas, and dry beans by advancing international trade, ingredient innovation, and consumer awareness. We aim to double global consumption and production of pulses through coordinated marketing, strategic partnerships, and evidence-based policy engagement.

The U.S. pulse industry plays a critical role in supplying nutrient-dense, resilient, and affordable foods to global markets. The top pulse-producing states—**North Dakota, Montana, Washington, and Idaho**—are global leaders in quality, with pulse exports accounting for a substantial share of U.S. production. For example, in the 2024–25 marketing year, 75% of lentil production, 45% of dry pea production, and 33% of chickpea production are projected to be exported.

Exports of U.S. pulses reached \$624.6 million in 2023–24 and are forecast to grow to \$652.2 million in 2024–25, marking the sector’s strongest performance in nearly a decade. This growth is fueled by improved logistics, rising demand for nutritious plant-based foods, and the partial resolution of key trade barriers. Despite volatility in ingredient exports, demand for whole pulses remains strong across Asia, Europe, Latin America, and Africa. Importantly, value-based tracking of pulse-derived ingredients (e.g., flours, proteins, fibers) continues to show commercial promise and is a priority for ongoing analysis.

Market Overview

History and Trading Relationship

Europe is a longstanding market for the US pulse industry, with decades of strong trading partnerships and communications, built on trust and personal relationships. US exports have shown a steady increase year on year, both in value and quantity.

The US pulse industry has access to all 27 countries in the EU as well as the UK and continues a strong growth trajectory, with long-term progress largely unaffected by temporary challenges such as production problems or supply chain issues.

In addition to commodity trade, the US currently holds a moderate market share in the EU pulse ingredient market, estimated to be between 15-20% of total imports. This position is primarily in protein concentrates and isolates, as well as specialized flours. Historically tariffs have been low to moderate with most pulses enjoying tariff free trade.

Current Tarriff Rates

- **0% for most pulses (including dry peas, lentils, chickpeas, and dry beans)**
- **7% on pulses exported as ingredients – Ingredients are categorized as an added-value product. Expectation of a “preferential tariff rate” likely below the MFN rate.**

Request

- The USADPLC believes that longstanding trade relations with the EU are mutually beneficial for both the United States and the European Union. As the EU is a vital market for U.S. pulse producers, **we request the elimination of all tariffs on pulses and pulse ingredients.**

U.S. Pulse Exports to Europe: Market Year Data and Projections

Export value in millions of dollars (\$M)



Source: USDA FAS data from GATS database (2012-2024). Market Year (June-May)

Note: While Current Policy and Zero Tariff are currently identical (0%), they are displayed slightly offset for visual clarity. The data values remain accurate.