



Pulses in the US

December 2025

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Pulses in the US - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Long shelf life and the search for affordable protein stimulate the demand for pulses

INDUSTRY PERFORMANCE

Beans drive demand as the search for affordability and protein aligns

Cultural adoption and meal preparation methods reshape consumption patterns

WHAT'S NEXT?

Cultural diversity expansion and protein trends to support modest but steady total volume growth

Lower cost structure positions pulses favourably although preparation planning weakens appeal

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Positive total volume sales growth amidst persistent challenges

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Pulses gain momentum as economical, health-orientated options

Climate change creates production challenges

Weather conditions inform production and price volatility

WHAT'S NEXT?

Climate and trade dynamics to heavily inform supply

Health and demographic considerations

Convenience pressures to challenge fresh food's growth potential

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