

# Developing the supply chain for Scottish pulses: a pre-feasibility study

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# Outline

1. Background and objectives
2. The existing supply chain for pulses in Scotland
3. Options for developing the pulse supply chain in Scotland
4. Conclusion and next steps

# 1. Background and objectives

- Growing advocacy for increased production and consumption of pulses, in Scotland and across UK
- Hits multiple public policy goals
- BUT supply chain and markets in Scotland still under-developed
- Aim of this study → to better understand the feasibility of growing the domestic supply chain for pulses in Scotland:
  - What does the existing supply chain look like?
  - What are the options for developing the chain?
  - Who can collaborate to move things forward?

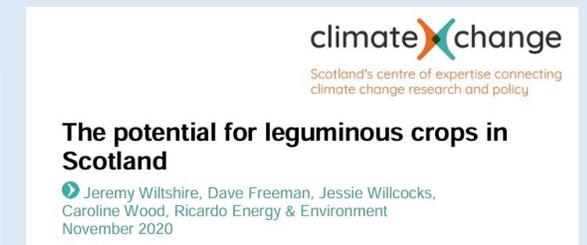
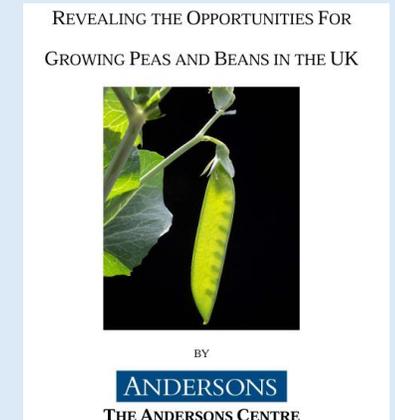
**Give Peas a Chance!**



**Bang in Some Beans**

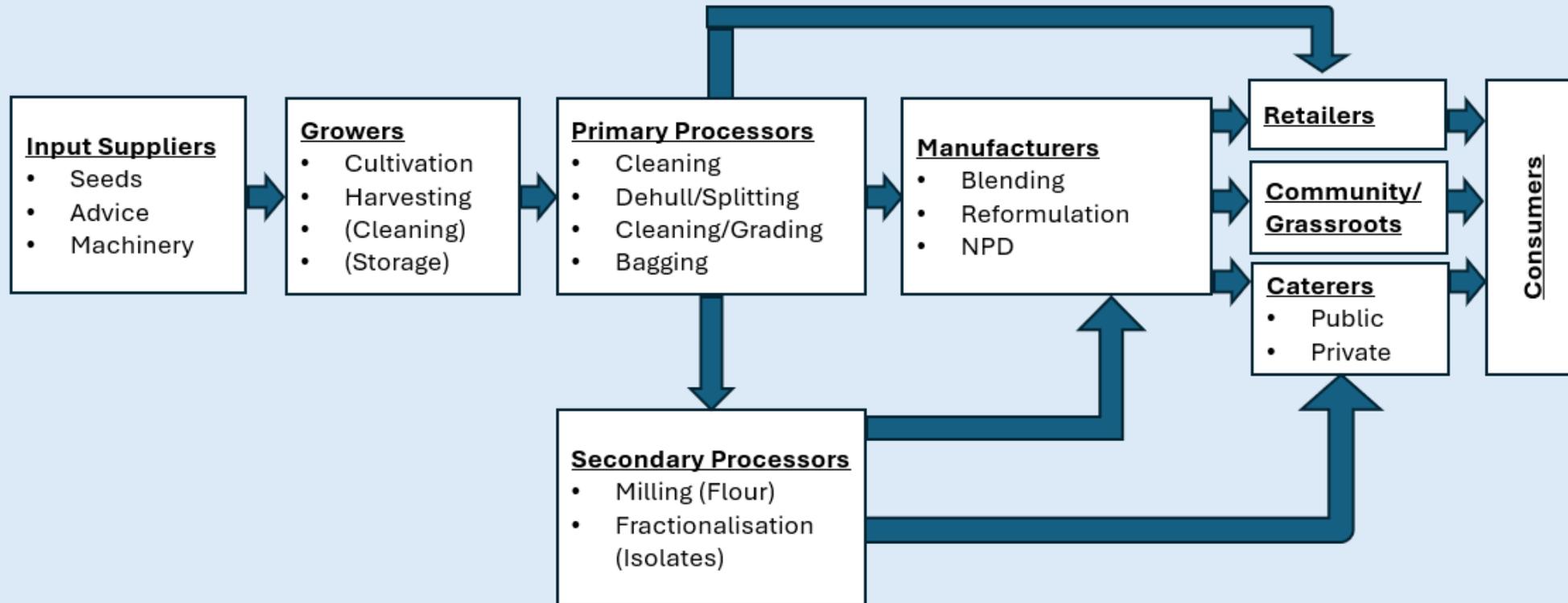
# What we did in this project

- 3 months desk-based study (Oct-Dec 2025)
- Review of secondary evidence (journal articles, papers, reports, press releases, webinars, online materials, events)
- Interviews/exchanges with academic, policy and practitioner stakeholders

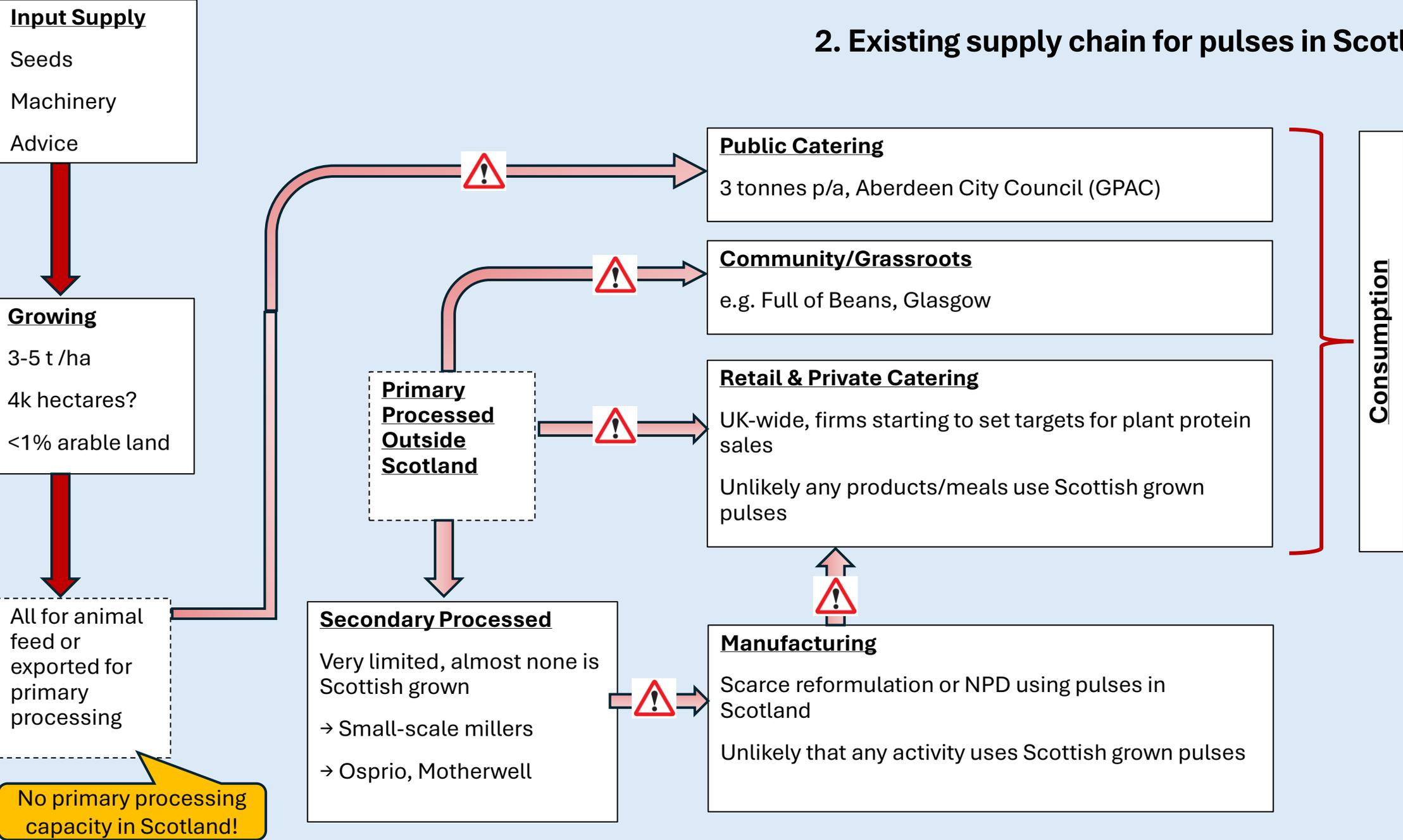


## **2. The existing supply chain for pulses in Scotland**

## Key Actors in Pulse Supply Chains: Generic

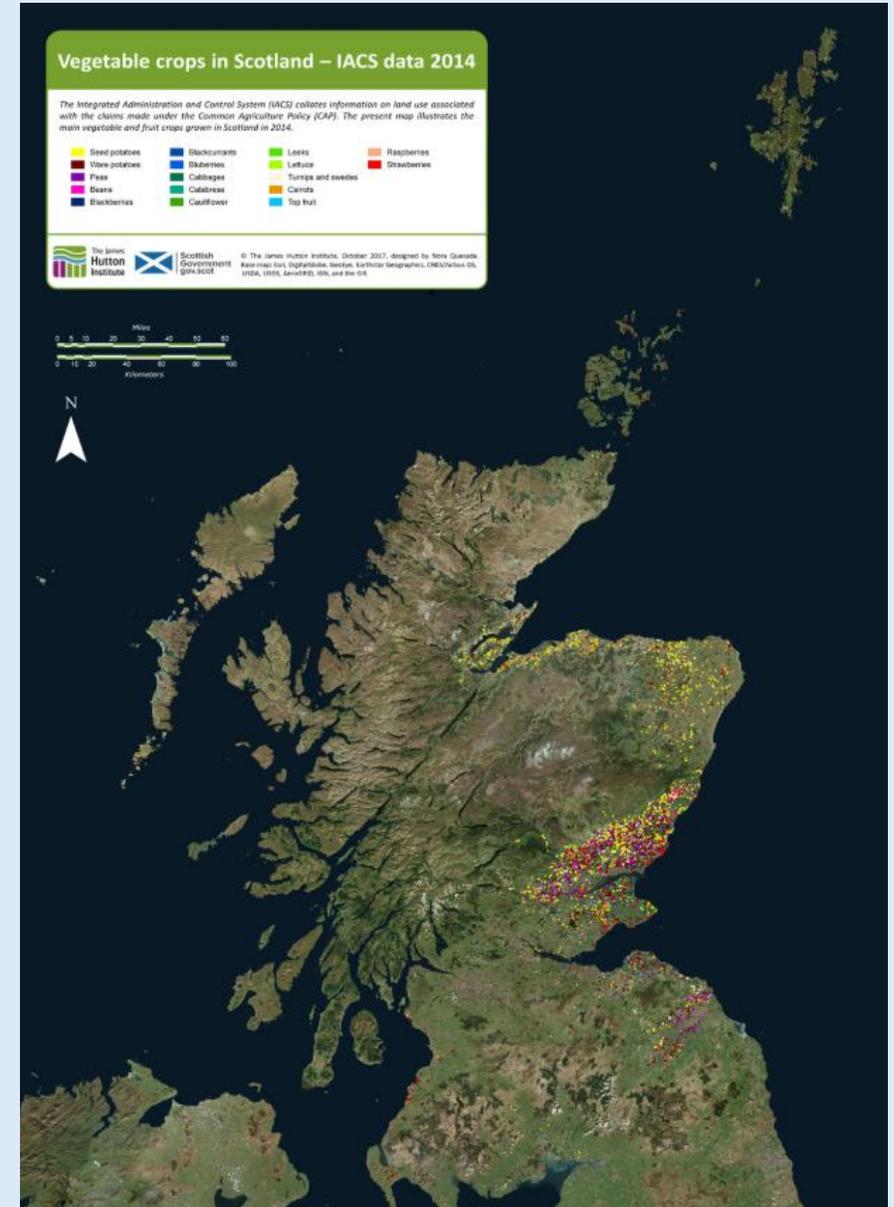


## 2. Existing supply chain for pulses in Scotland



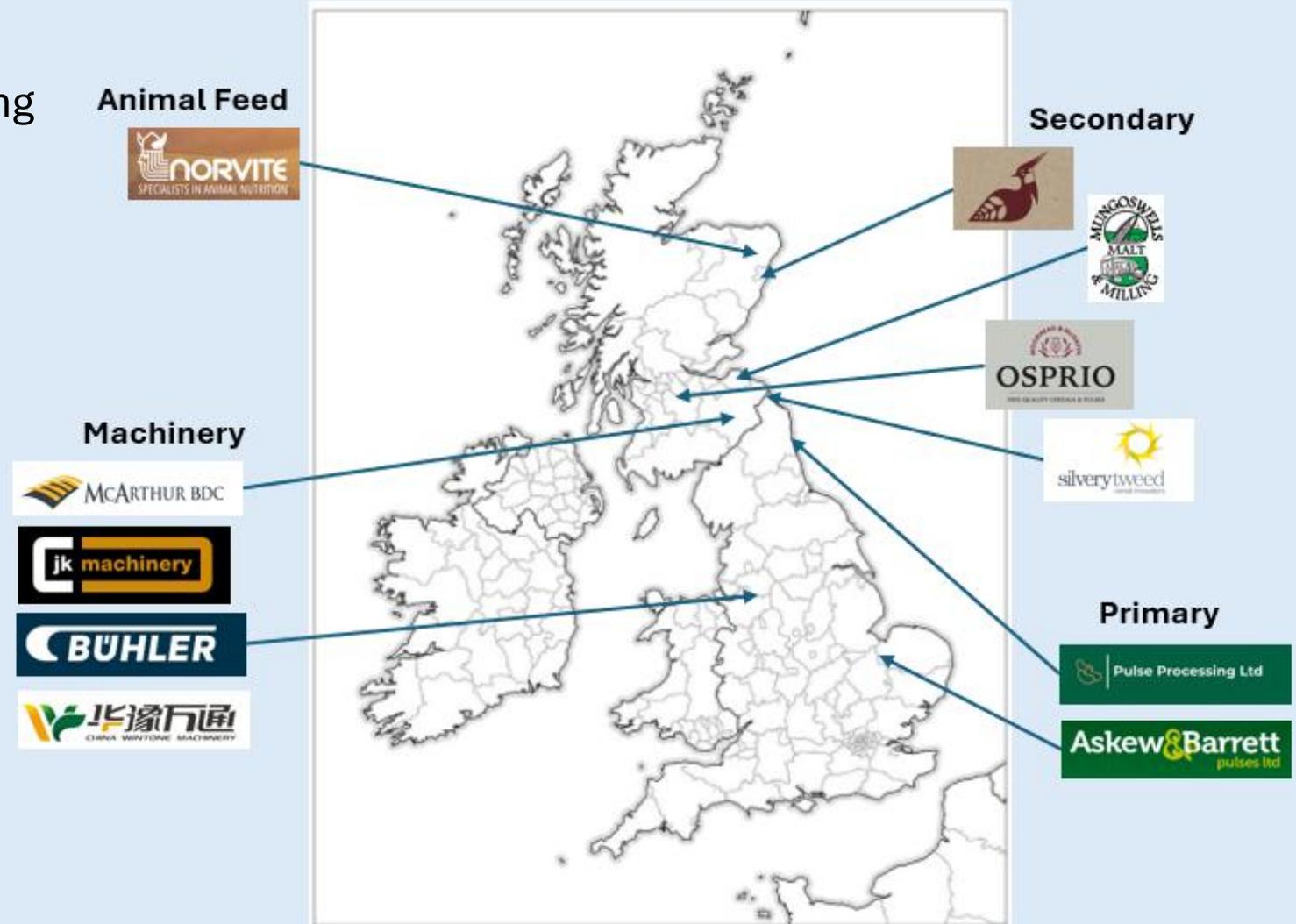
# Existing hectarage

- Imperfect official statistics
- High degree of geographic concentration
- Conflation with vining peas
- c.4k ha to c.5k ha



# Existing apparent processing capacity (illustrative)

- No apparent Scottish primary processing
- Various potential equipment suppliers
- Limited secondary processing
- Various possibilities



# Existing downstream activity (UK-wide)...

Companies with a sales-based target and/or disclosing data for sales of animal vs. plant protein:

## Manufacture & Wholesale

MANUFACTURERS	Company	Animal		Plant	
		Target	Data	Target	Data
	Danone		3*		3*
	Greencore		4		4
	Mars				
	Nestlé				
	Nomad Foods		4		4
	Premier Foods			3C	3C
	Samworth Brothers		1		1

WHOLE-SALERS	Company	Animal		Plant	
		Target	Data	Target	Data
	Bidfood		1		1
	Brakes				
	Bestway				

- Across UK, few manufacturers and wholesalers have set targets for increasing plant protein sales

## Retail & Catering

RETAILERS	Company	Animal		Plant	
		Target	Data	Target	Data
	Aldi				1B
	Asda			1B	1B
	Co-op		1B		1B
	Iceland			1A	1A
	Lidl GB	1A	1A	1A	1A
	M&S			1B*	1B*
	Morrisons		1B	C	1B
	Ocado		1A		1A
	Sainsbury's		1A		1A
	Tesco		1A	C	1A
	Waitrose		1A	1A*	1A

- More action in (some) retail and catering. Beans/pulses found in:
  - 18% of supermarket ready meals
  - 14% of restaurant meals
  - 3% of fast food meals

# Existing downstream activity (UK-wide)...

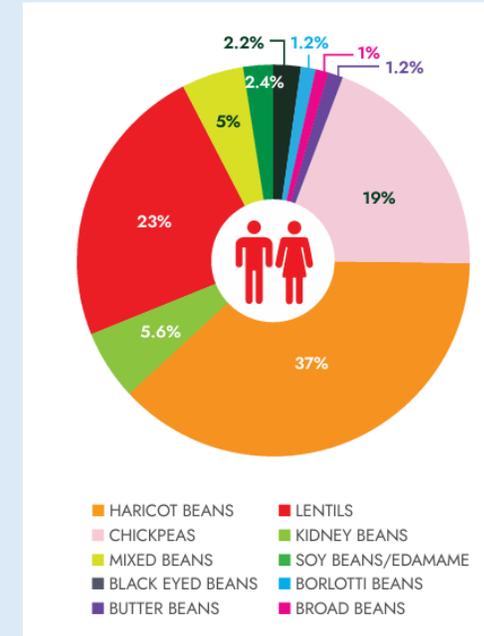
- **“Bang in Some Beans” campaign launched November 2025**
- **£1.4m Heritage Lottery Funding**
- **Food companies invited to sign Keen Bean Pledge: commitment to increase quantities of beans procured, sold or served, by 2028**

## Keen Beans Pledgers as at February 2026

Company	Increase what?	By how much?
Angel Hill Food Co.	Volume sales	25%
BaxterStorey	Volume sales	100%
Compass Group UK&I	Proportion procured	15%*
Field Doctor	Volume sales	100%
Finnebrogue	Volume sales	100%
Nursery Kitchen	Volume sales	75%
Wahaca	Volume sales	10%
Lidl GB	Volume sales all prods	50%
Sainsbury's	Sales tonnage plain beans	??
M&S	Volume sales ambient prods	15%
Waitrose	Volume sales all prods	25%
Ocado	Volume sales ambient prods	15%
Merchant Gourmet	Volume sales	100%
Suma	Volume sales	100%
Bidfood	Volume sales	30%
Compleat Food Group	Sales	25%
ISS	Procured prod	25%
Harvester	Procured prod	15%

## Existing consumption patterns (UK-wide)...

- On average, adults eat **ONE** portion of beans/pulses per week
  - **95%** eaten at home
  - **Most consumed types linked to familiar dishes**
  - **37%** of all beans/pulses eaten are baked beans
- 
- **c.75%** of adults agree pulses are healthy
  - **c.40%** claim they would like to eat more
  - **Existing level of familiarity and cooking confidence determines perceptions of:**
    - **Tastiness**
    - **Ease of cooking**
    - **How practical to add/substitute into diet**



**Which beans contribute to adult intakes? (Food Foundation, 2025)**



**New PLAYBOOK outlines 23 strategies restaurants and food service providers can use to help diners eat more sustainably.**

beta@wri.org

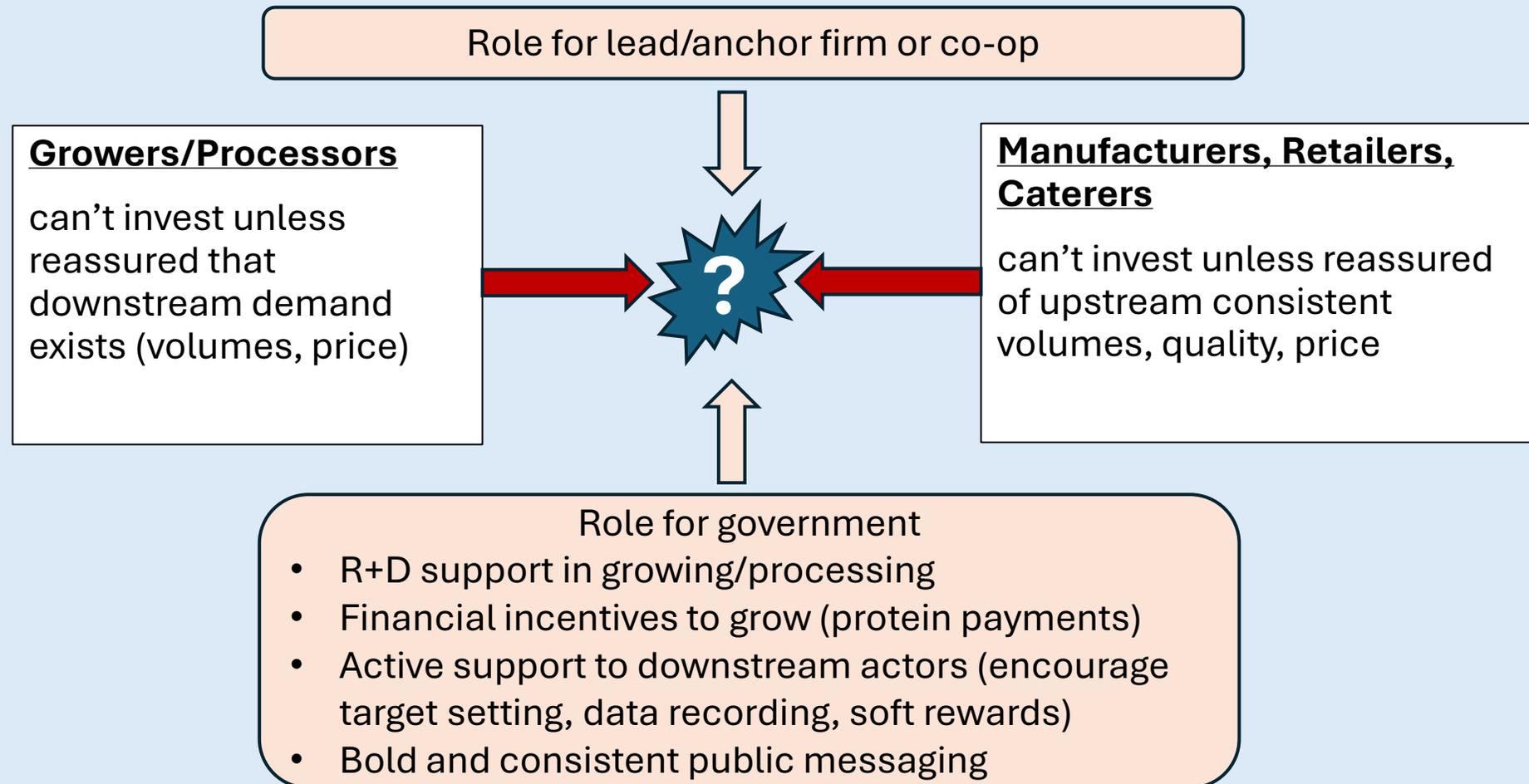
WORLD RESOURCES INSTITUTE

Sources: The Food Foundation (2025) Bean Facts; Kaimila et al (2025) European Journal of Nutrition, 64:139; Henn et al (2022) Food Quality and Preference, 104455; Nicholson and Jones (2023) Putting Beans on the Plate; Whittal et al (2023) Journal of Nutritional Science. [Playbook for Guiding Diners Toward Plant-Rich Dishes in Food Service | World Resources Institute](#)

### **3. Options for developing the pulse supply chain in Scotland**

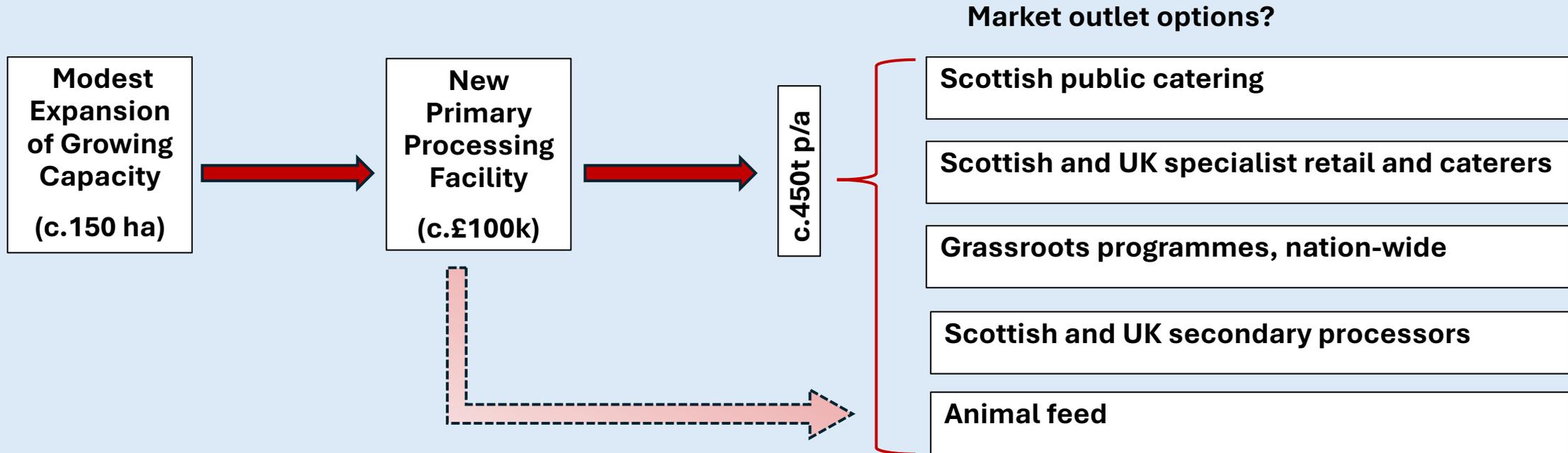
# Key principle for all development options: need for a **Systems Approach**

- Because of co-dependencies between actors along supply chain, need coordination and support: who leads?



# Option 1. Chain focused on primary processed pulses

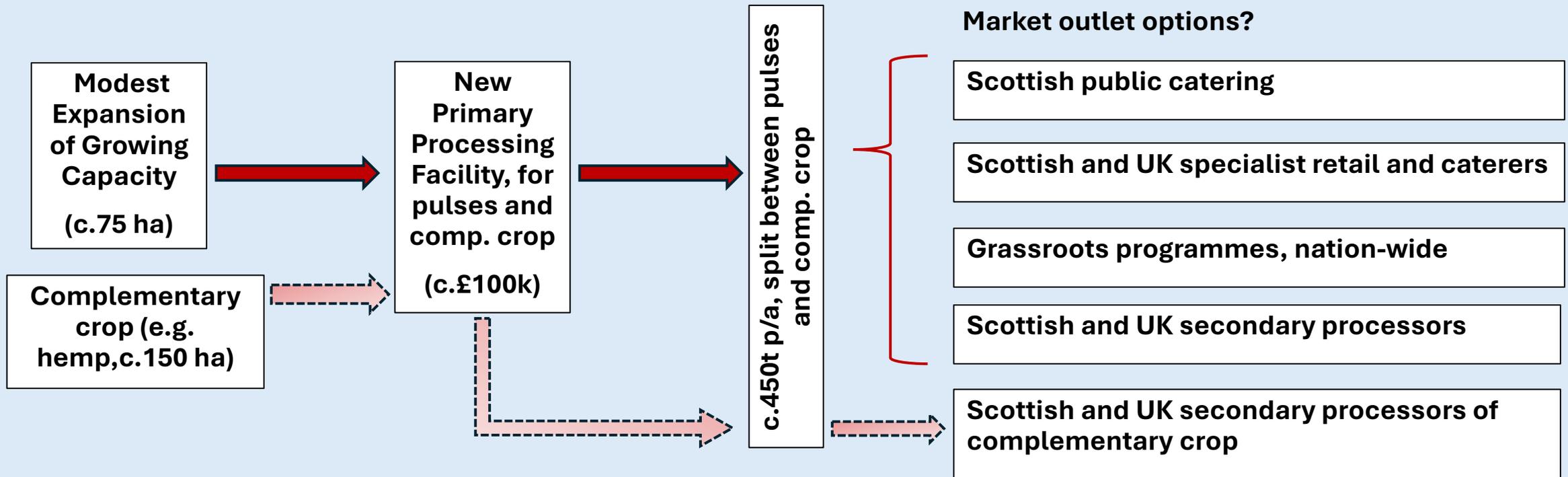
At minimum, the scale would be:



- This chain likely coordinated through small farmer co-op (processing facility sited on one member farm?)
- Issues for feasibility:
- Outlets for human consumption may buy only 50% of processed product? Majority goes to animal feed?
- Would this demand mix yield sufficient return?

# Option 2. Chain focused on primary processed pulses, with complementary crop (e.g. hemp)

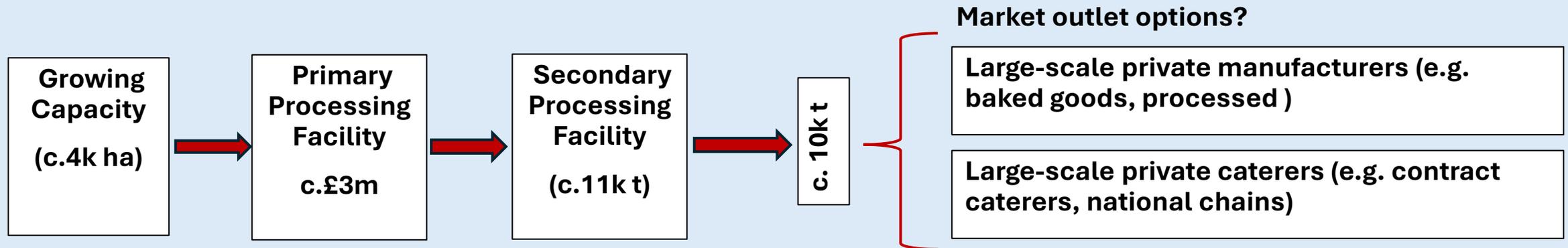
At minimum, the scale would be:



- This chain likely coordinated through small farmer co-op (processing facility sited on one member farm?)
- Processing throughput split between pulses and complementary crop
- Issues for feasibility:
- Market for complementary crop substitutes for animal feed market – could generate higher returns?

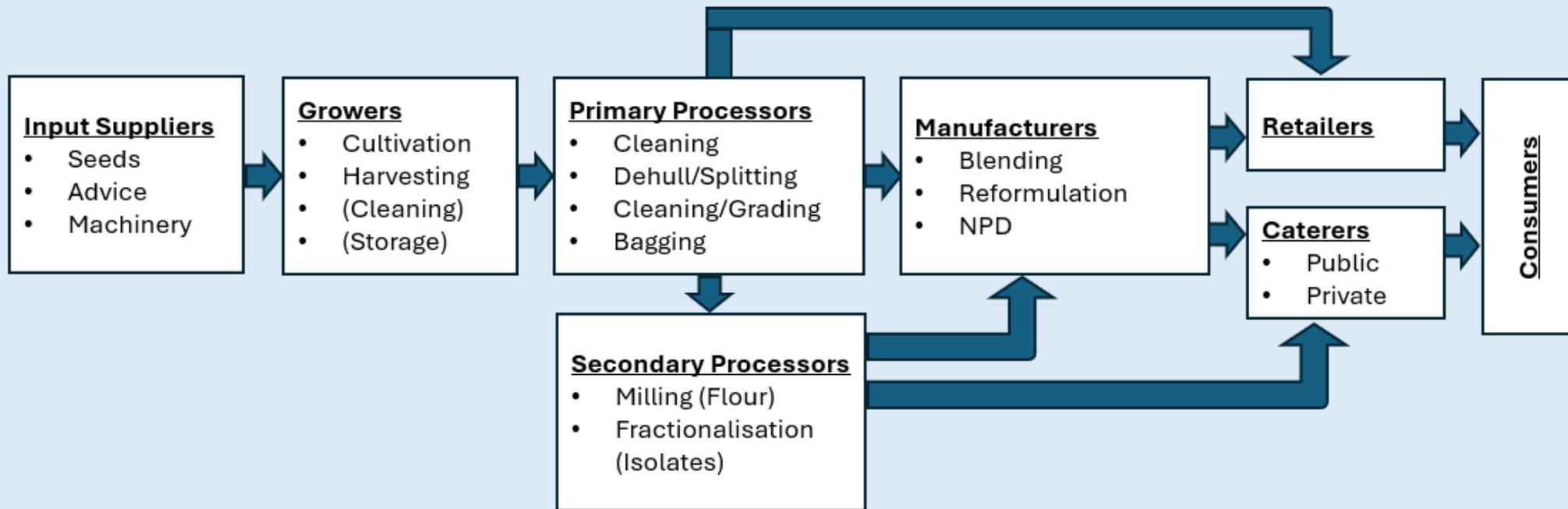
# Option 3. Chain focused on secondary processed, functional ingredients

Likely scale would be:



- Primary processing facility located in Scotland, may be coordinated through a farmer co-op
- Secondary processing facility buys in c.11k t pulses, produces c.10kt pulse flour (or fractionated ingredients)
- Issues for feasibility:
- Reliance on demand from large-scale manufacturers and caterers – how consistent/committed would they be?
- Pulse protein is global commodity, chain would need buyers WTP premium for Scottish.

# How can government help to grow supply chain? Protein strategy?



R&D capacity  
KT capacity  
Spin-offs

Area payments  
KT support  
Co-operation

Co-operation  
Capital grants  
Market intelligence

Capital grants  
Circular economy  
Market intelligence

Innovation vouchers  
Circular economy  
Market intelligence

Dietary guidance  
Public procurement  
Marketing campaigns

## **4. Conclusion and next steps**

## Conclusions

- Lots of potential with different options, but some well-recognized challenges
- For next steps, need to clarify:
  - Scale of ambition and potential synergies
  - Grassroot and processor interest (inc organic)
  - Downstream market outlet interest in different products
  - Policy commitment (noting potential synergies e.g. hemp seed)
  - Preferences for ownership and value-chain governance



**Thank you for your attention!**