



US DRY BEAN

Council

Merc@limentos

2025 Winter Board Meeting– UES Planning Denver CO – March 2025

*By: Mercalimentos Consultores S.C.
USDBC Mexico Representative
February 4th, 2025*



US DRY BEAN

Council

Raul Caballero, Violeta Picazzo
US Dry Bean Council Mexico,
Serving since 1996

Merc@limentos


Facts Mexican Dry Bean Market

- **Largest Single Export Market for U.S dry bean, 120,000 Average**
- **A Dry bean producer-consumer-importer-exporter**
- **Historic Production is around 1 million MT**
- **in two cycles:**
- **Spring-Summer:**
Black, Pinto and colored
Zacatecas, Durango, Chihuahua, San Luis Potosi and Guanajuato
- **Fall-Winter: Yellow, Black beans, some Pintos and Garbanzos**
- **Sinaloa and Nayarit**
- **Price-sensitive and speculative market.**
- **A staple food but consumption is decreasing over lack of time for preparation with new generations**
- **Consumers require education on Nutrition to reconsider eating more**

Harvest-Planting Report 2024 Consultant Assessment

NATIONAL
SIAP 660,046 MT.
THIS ASSESSMENT: 410,768 MT
VAR. -37.8%

NATIONAL DRY BEAN PRODUCTION BY STATE
This estimation vs. SIAP
2024 Spring-Summer Cycle

STATE	SURFACE (has)		PRODUCTION (MT)	YIELD (MT)
	PLANTED	HARVESTED		
SIAP 1/				
Dec-24				
TOTAL	1,246,603	1,117,841	660,046	0.590
Chihuahua	67,390	47,799	31,632	0.662
Durango	218,275	134,589	64,721	0.481
Guanajuato	46,130	46,125	39,855	0.864
San Luis Potosí	72,267	64,732	38,114	0.589
Zacatecas	630,665	615,790	324,370	0.527
Others	211,878	208,806	161,354	0.773
ESTIMATION				
Jan-25				
TOTAL	881,424	741,234	410,768	0.554
Chihuahua	36,939	12,905	21,164	1.640
Durango	117,682	96,499	44,057	0.457
Guanajuato	39,120	39,120	29,461	0.753
San Luis Potosí	60,600	58,900	32,049	0.544
Zacatecas	458,868	367,094	180,577	0.492
Others	168,215	166,715	103,461	0.621

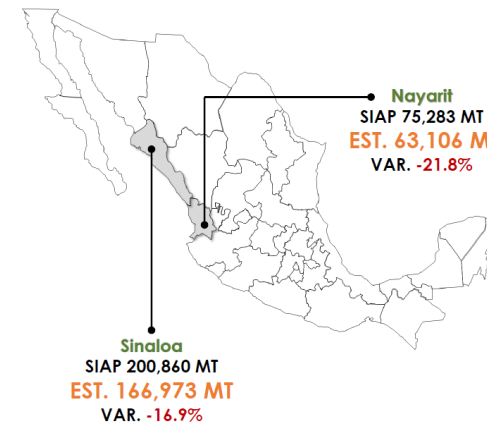
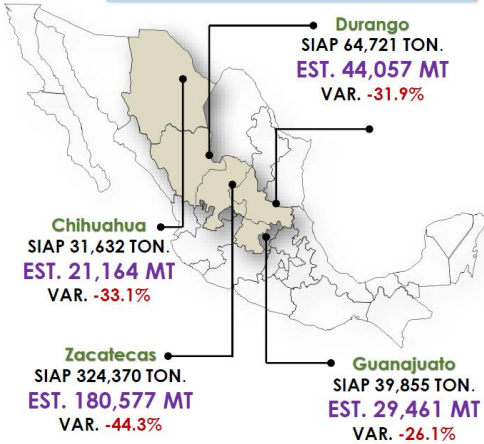
In this Report 3, it can be confirmed that total 2024 Spring-Summer bean production in Mexico, can be estimated at 410,768 MT, -37.8% shorter than the most recent SIAP estimation, and -43.3% shorter than the 2017-2023 average of 723,911 MT

NATIONAL
SIAP 364,956 TON.
THIS ASSESSMENT: 285,654 TON.
VAR. -21.8%

2025 FALL-WINTER DRY BEAN PLANTING- PRODUCTION BY STATE
This estimation vs. SIAP

STATE	SURFACE (has)		PRODUCTION (metric tons)	YIELD (MT/ha)
	PLANTED	HARVESTABLE		
SIAP				
October 2024 1/				
TOTAL	255,528	255,528	364,956	1.428
Nayarit	62,910	62,910	75,283	1.197
Sinaloa	90,718	90,718	200,860	2.214
Other	101,901	101,901	88,812	0.872
THIS ESTIMATION				
JANUARY 2025 2/				
TOTAL	239,216	239,216	285,654	1.194
Nayarit	60,101	60,101	58,899	0.980
Sinaloa	98,219	98,219	166,973	1.700
Other	80,896	80,896	59,782	0.739

According to information obtained from local bean producers and traders in Nayarit and Sinaloa, -the two most important bean states in this cycle-, it is estimated that this cycle's bean production will be of 285,654 MMT, -21.8% shorter than SIAP's estimation of 364,956 MT and -9.9% shorter than the 2019-2023 average of 317,180 MT

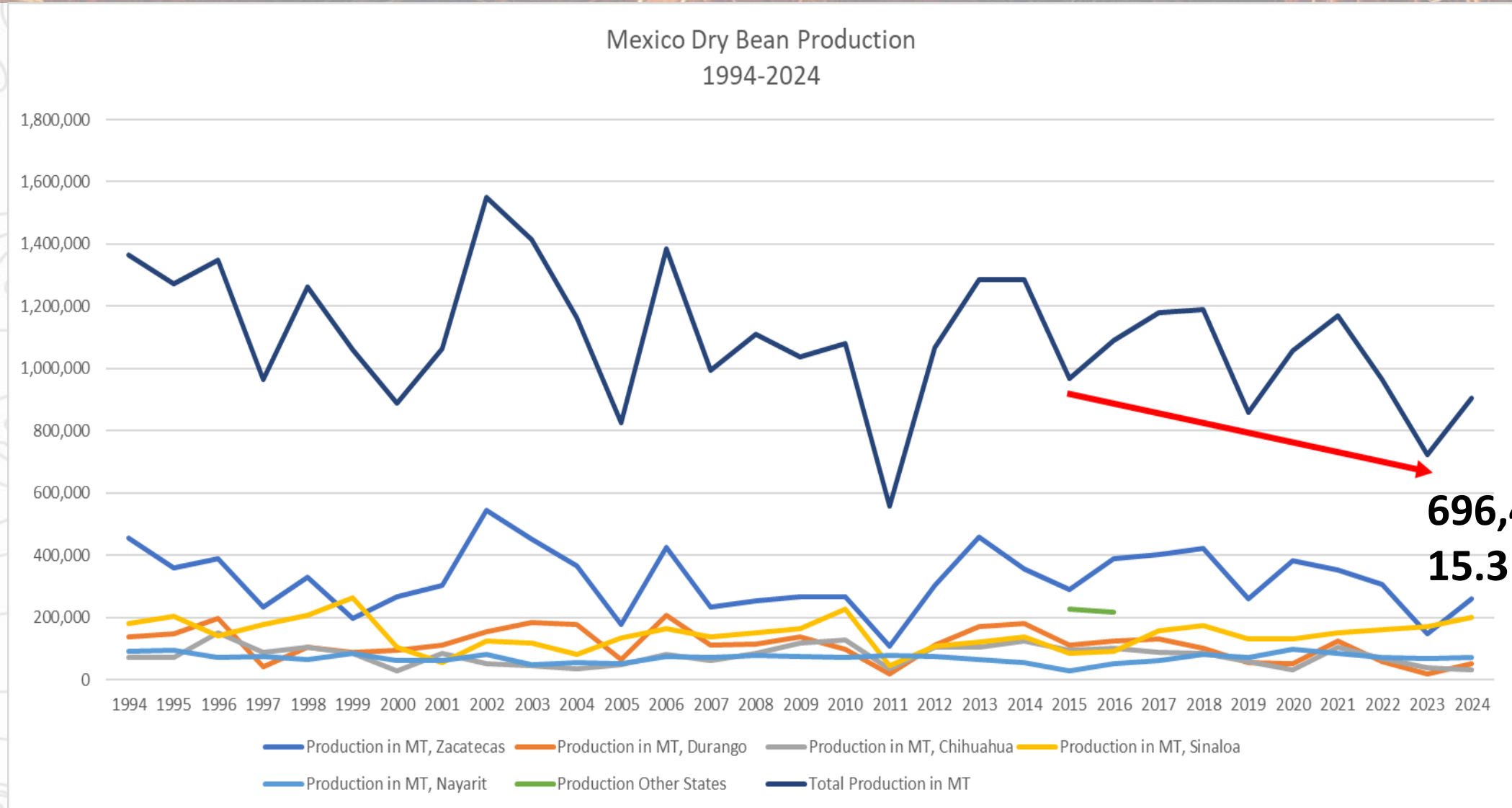


Source: Own estimations based on field visits and statistics
1/ 2024 Spring-Summer production update to December 2024

Source: 1/ SIAP Planting Intention
2/ Own estimation based on Stats and information gathered from producers and traders in the production areas

(SS) 410,768 MT + (FW) 285,654 MT
696,422 MT = 15,353,458 CWT

Mexico's Historical Production 1994-2024

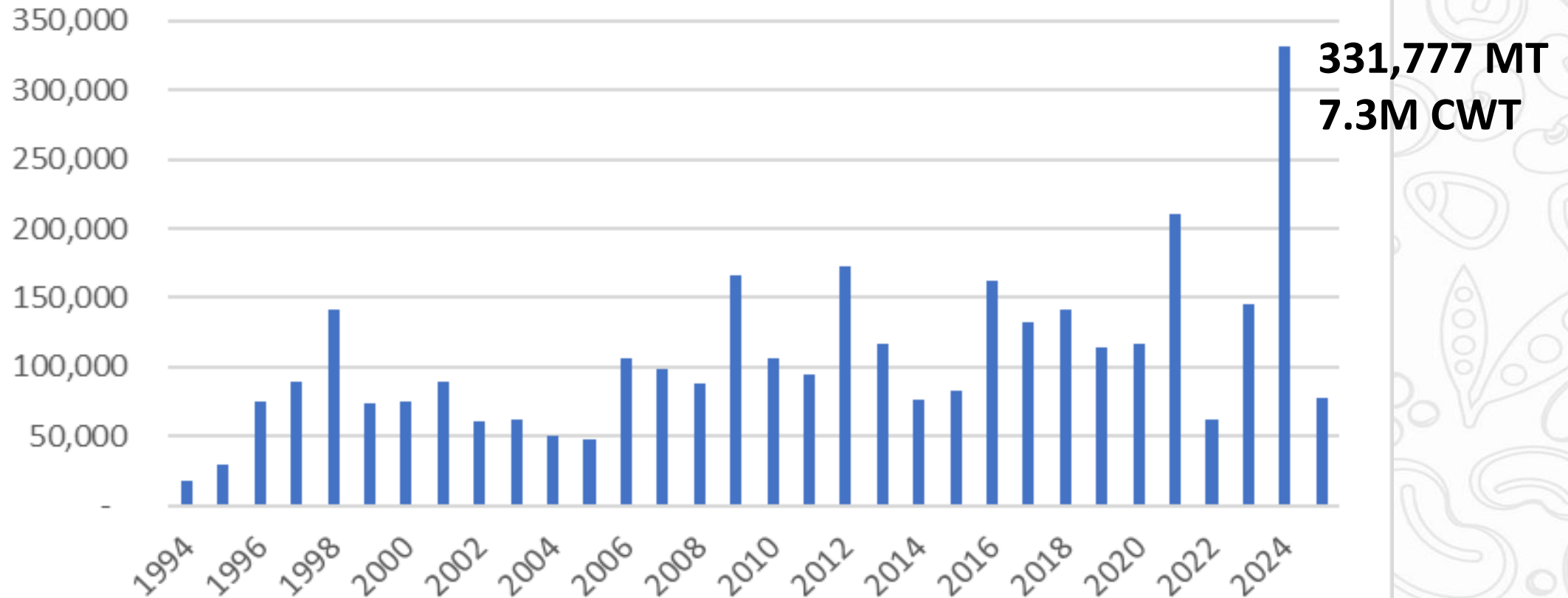


NAFTA-USMCA Historical Dry Bean Imports 000 MT



US DRY BEAN
Council
Merc@limentos

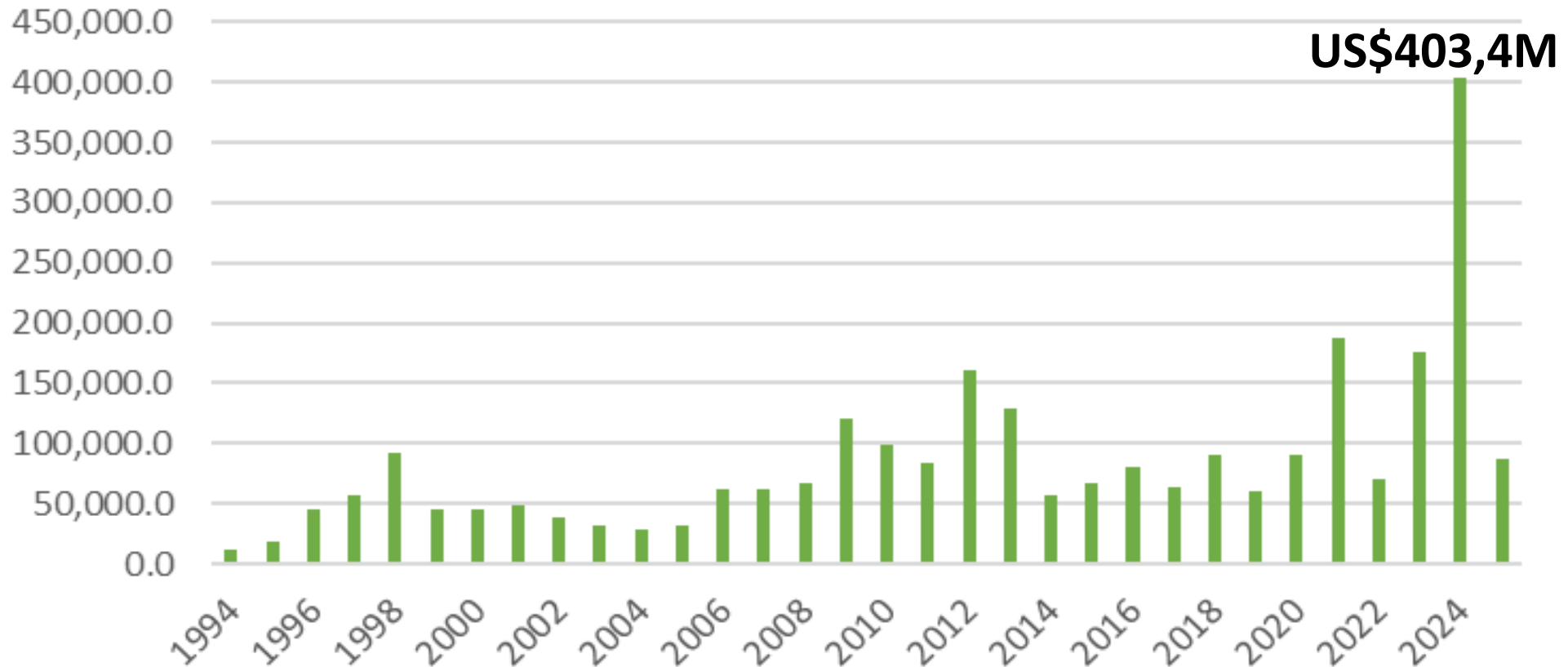
NAFTA-USMCA - LIFESPAN 1994-2025 VOLUME



Source: Mexican Customs and FAS-USDA

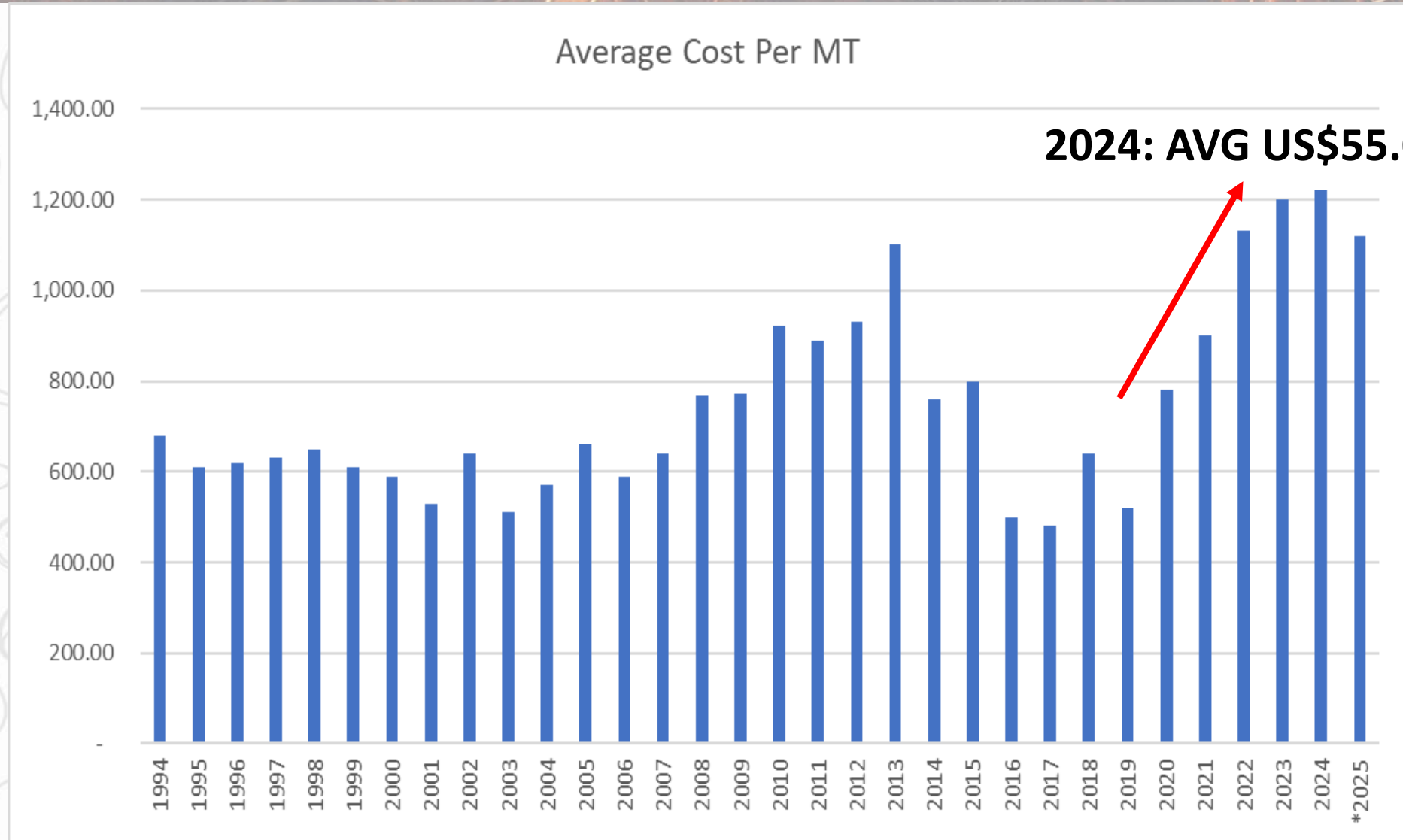
NAFTA-USMCA Historical Dry Bean Imports US\$M

NAFTA-USMCA - LIFESPAN 1994-2025
VALUE Millions USD



Source: Mexican Customs and FAS-USDA

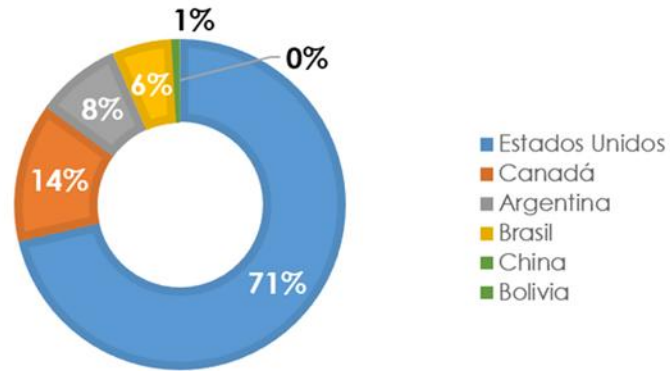
NAFTA-USMCA Historical US\$ 000 per MT



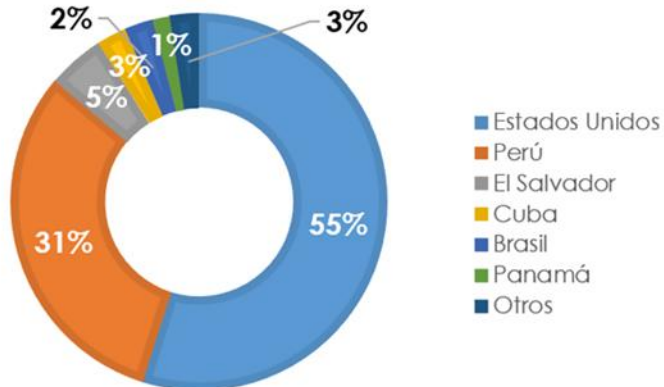
Source: Mexican Customs and FAS-USDA

NAFTA-USMCA Historical US\$ 000 per MT

MEXICO'S BEAN IMPORTS - COUNTRIES OF ORIGIN 2023/2024



MEXICAN BEAN EXPORTS - DESTINATIONS 2023/2024



ANAM- National Importers Association data. Mexican Commercial Year October-September each year.

DRY BEAN IMPORTS - EXPORTS

Countries of Origin/Destination, Commercial Year

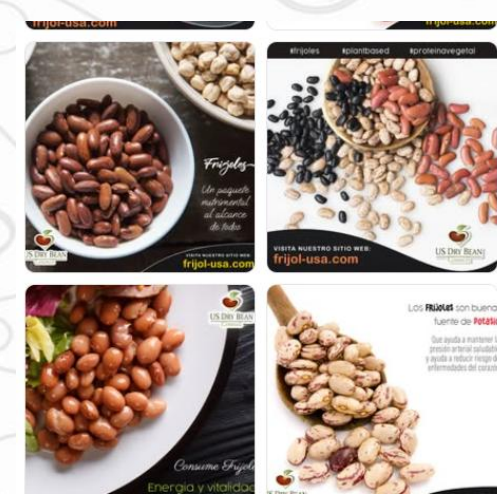
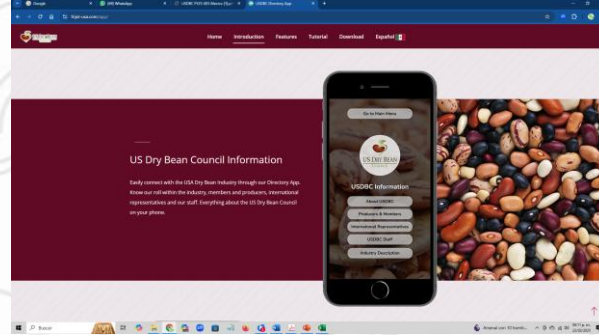
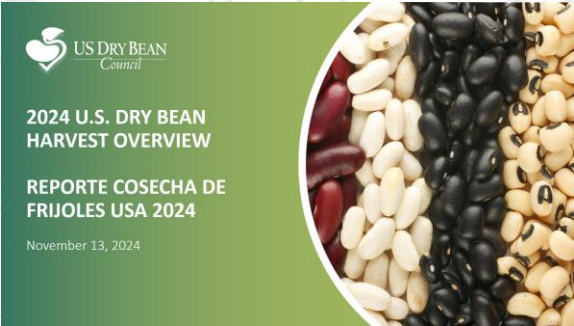
MEXICO'S BEAN IMPORTS-EXPORTS BY COUNTRY MT - September to October CY

PAIS / AÑO	2022/2023	2023/2024
IMPORTACIONES		
Estados Unidos	165,467	332,416
Canadá	17,984	63,409
Argentina	14,678	38,457
Brasil		27,171
China		3,533
Bolivia	288	347
Total	198,417	465,333
EXPORTACIONES		
Estados Unidos	12,487	14,076
Perú	5,078	8,020
El Salvador		1,256
Cuba	2,330	645
Brasil		630
Panamá	2,664	375
Otros	1,293	641
Total	23,850	25,643

456,777MT
US\$553.8M

The United States Remains the Most Important Dry Bean Import and Export Trade Partner

2024 Activities: Beancon24 Cancun Mexico




2025 - 2026 USDBC Mexico Activities



Puerto Vallarta Feb 12-14, 2026

- ***USA Dry Bean Pea Lentil Garbanzo Mx-Latam Conference***
- ***2025 Planting Harvest Tour Rept***
- ***Trade Servicing-Social Media and Market Intelligence***
- ***USDBC App Maintenance***
- ***Recruitment of 3 Mexican Buyers to the 2025 Harvest Tour***

USDBC Dry Bean App for Iphone and Android



English

US DRY BEAN
Council

- USDBC Information
- About Beans
- Suppliers Directory
- News
- Pulses for Health Alliance
- Sustainability
- Added Value
- Bean Market News
- Request Quote

USDBC Directory App

A new way to stay in touch with the US dry bean industry, access the latest news, the USDBC industry directory, trade events and much more. Start interacting with the community now! Just download to your smartphone!

USDBC Dry Bean App for Iphone and Android



Android



Apple





Thank you