



Argentina 2024 Harvest Tour Report June 9 - 15



L-R: Roman Kutnowski (Chippewa Valley Bean), Mario (Grupo Martinez), Dan Smith (Kelley Bean), Norman Krause (farmer, Northarvest), Francisco Martinez (Grupo Martinez) and Alejandro Leloir (USDBC).

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I. Schedule

Sunday, June 9	Travel to Tucumán
Monday, June 10	Visited the Southern subregion of the dry bean growing area (Tucumán)
Tuesday, June 11	Visited the Central subregion (Southern Salta)
Wednesday, June 12	Field visits along the Route 5 corridor in the Northern subregion (Pichanal, Salta)
Thursday, June 13	Visited the Northern subregion (Oran, Salta)
Friday, June 14	Return to the City of Salta. Dined with Rita Villafañe of ArgenCrops and dry bean grower Mario Gerala.
Saturday, June 15	Harvest tour ends. Participants part ways.

Argentina 2024 harvest tour trip map



Source: [Google](#)

II. Objectives

- 🌱 Meet with farmers, agronomists, processors, agricultural technology experts, dry bean breeders, and traders/exporters to better understand the dry bean value chain in Argentina and the trends in production and international marketing.
- 🌱 Assess and report on the 2024 Argentine dry bean harvest by bean type.
- 🌱 Hold one-on-one meetings with specialists about Argentine dry bean trends, including in terms of hectares planted, technologies (including seeds and inputs), production trends for different bean types and regions, climatic conditions, and the economics affecting production and marketing.
- 🌱 Visit fields in the dry bean growing area.

III. Key Findings

- 🌱 Visited farming operations in the Southern growing region (Tucumán), in the Central growing region (Rosario de la Frontera), and the Northern growing region (Route 5 corridor and Oran area).
- 🌱 Met with representatives from 5 companies involved in dry bean production and exporting. The companies were selected because of the location of their fields and the size of the area they farm. These companies seed a large number of hectares to dry beans and thus provide a representative sample of Argentina's overall dry bean production area.
- 🌱 Photographs from the trip are available [here](#).
- 🌱 USDBC Argentina crop monitoring reports are available [here](#).
- 🌱 This year's crop yields and quality were heavily impacted by two main factors: dry conditions at planting, which delayed the seeding of much of the bean crop, and two frost events in May (on the 18 and the 28). Some in the dry bean industry are calling it the worst crop year since 2013.

White and colores beans

- 🌱 In the northern growing area, along the route 5 corridor (key alubia bean growing area), the average yield is estimated at 600 kg/ha. (compared to a normal yield of 1,000 kg.ha.).
- 🌱 Further north, near Oran, Salta, bean yields are expected to be down 50% from last year. High temperatures shortened the growing season from 103 to 83 days. Yields are estimated to range from 600 kg/ha. in the worst cases to 1,200 kg/ha. in the best cases.
- 🌱 This year's alubia bean crop is expected to be 40% smaller than last year's, which was itself a below average crop. Additionally, this year's alubia bean caliber-size distribution is on the small side.
- 🌱 The LRKB crop was impacted by frost, knocking down yields, impacting quality and resulting in smaller calibers.
- 🌱 Growers are prioritizing their seed needs in order to avoid problems next year, especially for beans other than black beans, which fared better than the other classes.

Black beans:

- 🌱 In the southern and central growing areas (key black bean growing regions), about 20% of the bean area was affected by frost. In the impacted area, yields are estimated to be down 20% from initial expectations.

- ☪ The impact of frost was not as severe as initially feared because, thanks to abundant vegetative growth, leaves provided some protection for the pods. Nonetheless, in addition to reduced yields, the frost also affected the quality of the beans.
- ☪ Black bean prices are being supported by strong demand from Mexico and Central America. If Mexico continues to buy, current prices should be sustained.
- ☪ However, increased production in Argentina, Brazil and the U.S. is a concern for next year.
- ☪ Falling corn prices will place further price pressure on beans.

2024 production estimates

The below estimates represent USDDBC’s best effort to assess 2024 production, based on field visits from March to date, and conversations with the local industry.

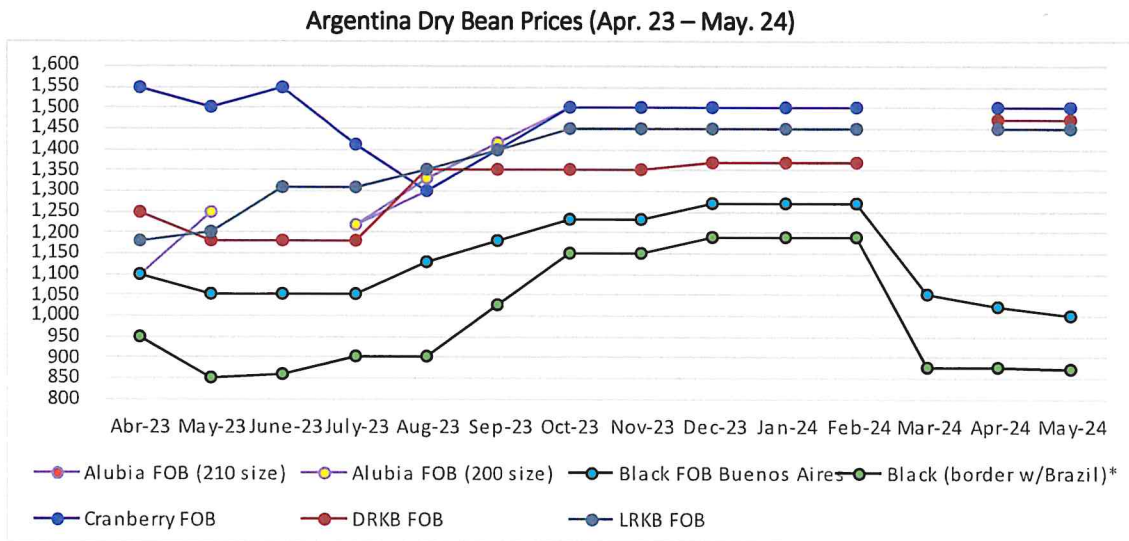
2021-2023 production figures, and 2024 estimates

Bean Class	Planted Area (Hectare)						Yield (MT/Ha)					
	2021	2022	2023	2024	2023/24 % change	2024/5-year average % change	2021	2022	2023	2024	2022/23 % change	4-year average
Black	160,000	185,000	185,000	195,000	5%	18%	1.20	0.90	0.80	1.1	37.5%	1.02
Alubia	183,750	170,000	142,000	140,000	-1%	-17%	1.20	1.00	1.00	0.7	-30	1.08
Cranberry	28,000	37,000	40,000	33,000	-18%	11%	1.15	1.00	1.10	0.8	-27	1.09
DRK	35,000	45,000	45,000	50,000	11%	49%	1.25	1.00	1.00	1.0	0%	1.11
LRK	11,000	15,000	17,000	14,000	-18%	17%	1.20	1.00	1.10	0.8	-27	1.15
Mung	55,000	60,000	70,000	70,000	0%	23%	1.05	1.05	1.00	1.0	0.0%	1.03
Total	472,750	512,000	499,000	502,000	1%	8%	1.18	0.99	1.00	0.9	-10%	1.08

Bean Class	Gross Production (MT)					Exportable Supply (MT)				
	2022	2023	2024	2023/24 % change	4-year average	2022	2023	2024	2022/23 % change	4-year average
Black	166,500	148,000	214,500	45%	169,255	149,850	133,200	154,440	16%	152,330
Alubia	170,000	142,000	98,000	-31%	181,250	153,000	127,800	73,500	-42%	160,028
Cranberry	37,000	44,000	26,400	-40%	33,250	33,300	39,600	19,800	-50%	29,535
DRK	45,000	45,000	50,000	11%	40,038	40,500	40,500	37,500	-7%	35,508
LRK	15,000	18,700	11,200	-40%	15,625	13,500	16,830	8,400	-50%	13,703
Mung	63,000	70,000	70,000	0%	62,688	56,700	63,000	56,000	-11%	55,536
Total	496,500	467,700	470,100	1%	502,105	446,850	420,930	349,640	-17%	446,638

Source: USDDBC

Prices:



Source: Industry members

IV. Recommendations

- 🌾 Continue the USDBC harvest trade mission to Argentina in May/June of each year to get a sense of the status of the crop and to stay abreast of new developments. This information is important to U.S. growers and dealers since Argentina is a major dry bean exporter.
- 🌾 Follow trends and the development of new varieties for indications of Argentina’s market goals.
- 🌾 The USDBC will continue to produce Argentina Crop Monitoring reports to provide the U.S. industry with indications about the hectares planted and early crop conditions. These reports will run from March of each year through July because the Argentine harvest may continue that far into the year. Updates will also be provided in the monthly market reports.

V. Meetings and Contacts

JUNE 10: Southern subregion, Tucumán area

Paramerica

Autopista Ruta Nacional 38, Km. 797.
San Felipe. Tucumán.
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paramerica@paramerica.com.ar
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Paramerica exports about 30,000 MT of dry beans a year, of which 30% is produced by the company itself and the remainder is purchased from other producers. The company is one of Argentina's leading exporters of black beans.



L-R: Diego Ruiz, Matias Ruiz, Julie Krause, Norman Krause, Dan Smith and Alejandro Leloir.

At Paramerica, they see strong demand from Mexico and Central America sustaining black bean prices this year. However, they are concerned about increased global production, mainly in Argentina, Brazil and the U.S., and what it could mean for prices next year.



JUNE 11: Central subregion, Rosario de la Frontera area

LG Food

Tucumán

<https://www.lgfoodargentina.com/>

Contact:

Guillermo Lopez Gonzalez

Mobile: +54 9381 5956597

guillolopezgonzalez@lgfoodargentina.com

Seiler Farms/Agro Alas

Ruta Provincial 303- km 47, (4186) Las

Cejas. Tucumán.

<https://agroalas.com.ar/>

Contact:

Federico Seiler

federico.seiler@agroalas.com.ar



Visit to the LG Food plant. L-R: Dan Smith, Evelina Lopez Gonzalez, Guillermo Lopez Gonzalez, Julie Krause, Norman Krause and Juan Lopez Gonzalez.

Guillermo Lopez Gonzalez has more than 20 years of farming experience and has been handling LG Food's exports for 10 years. The company manages over 7,000 hectares of soybeans, black beans, DRKBs, LRBs, mung beans and popcorn in three locations: southern Salta, Santiago del Estero, and Tucumán.

Seiler Farms manages over 15,000 ha of land, planting around 6,000 ha. of dry beans each year. The family also operates Agro Alas SRL, which provides aerial crop spraying services and represents the U.S. aircraft manufacturer Air Tractor in the region.



L-R: Jari (LG Foods agronomist), Walter Sr. and Walter Jr. (growers in the area), Julie Krause, Alejandro Leloir, Dan Smith, Juan (LG Foods), Guillermo (LG Foods), Evelina (LG Foods), Federico Seiler (Agro Alas), Roman Kutnowski (Chippewa Valley Bean) and Norman Krause.

We visited bean fields in the Central subregion, in the vicinity of Rosario de la Frontera. Bean crops in this area had abundant vegetative growth. Therefore, when frost hit on May 18, the leaves protected the pods and alleviated the impact. Nonetheless, in about 20% of the dry bean area, a yield loss of 20% is expected. Quality issues are expected as well.

At LG Foods, they believe black bean prices will be sustained as long as Mexico keeps buying. Further, the drop in corn prices will put additional pressure on bean prices. However, as in Paramerica, there is concern about prices next year.



JUNE 12: Northern subregion, Route 5 corridor

Alimar SA

Parque industrial General Güemes, Salta
Ruta Nacional 34 – km 1132

<https://alimar.com.ar/>

Contact:

Ivan Martín, Commercial Manager

imartin@alimar.com.ar

Tel: +54 387 4912611

Cel: +54 9387 5326923

Alimar is an agribusiness company that produces, processes and exports dry beans. Its main market is the European alubia bean market.



Visit to the Alimar plant. L-R: Roman Kutnowski, Julie Krause, Norman Krause, Dan Smith and Ivan Martin.

We visited bean fields along the Route 5 corridor in the company of Francisco Martinez, who explained that in a normal year alubia bean yields along the route 5 corridor average 1,000 kg/ha. and, in a very good year, can average as much as 1,500 kg/ha. This year, however, because of poor moisture early on and the impact of a major frost event on May 28, the expected average yield is 600 kg/ha. Although the lots that we visited were yielding 400 kg/ha., late-seeded crops that were yet to be harvested are expected to do better and bring the average up to 600 kg/ha. Ivan informed us that growers need yields of 650 kg/ha. to cover production costs. Further, the caliber size distribution of this year's alubia bean crop is on the small side. In general, humidity is 15%, loss is 20%, caliber size is averaging 250 and yields are averaging 300 kg/ha. In Ivan's estimation, this is the worst year since 2013.



By filling big bags in the field, Alimar guarantees traceability. Samples are taken from each big bag and analyzed for quality in order to form uniform lots. Later, at the plant, the bags are tagged, indicating the farm of origin, the seeding date and the seed variety.

JUNE 13: Northern subregion, vicinity of Oran

Desdelsur

Salta

<https://www.desdelsur.com/>

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Cel: +54 9 11 5322 1212

matiasmacera@desdelsur.com

Gabriel Rodriguez, Agronomist

gabrielrodriguez@desdelsur.com



L-R: Alejandro Leloir, Roman Kutnowski, Gabriel Rodriguez (Desdelsur), Dan Smith, Norman Krause.

Desdelsur is an integrated production, processing and exporting company. It grows corn, soybeans, specialty crops and grass for feed, and raises cattle. The company owns 50,000 ha. in the northernmost reaches of the dry bean growing region and typically seeds 20,000 ha. to dry beans (10-12,000 ha. of colored beans and 6-7,000 ha. of cranberry beans. Desdelsur typically accounts for 40% of Argentina's cranberry bean exports. The company also produces smaller amounts of mung, black beans and black-eye peas. The company is headquartered in the San Isidro suburbs of the City of Buenos Aires, but its processing plants and warehouses are in Salta.

Desdelsur agronomist Gabriel Rodriguez took us to visit Desdelsur's farming operation, located near the municipality of Tartagal, just 80 miles from the Bolivian border. The company seeded 17,000 ha. to beans this year, but lost 2,500 ha. High temperatures caused the crop to go dormant; as a result, crops were cut at 103 days instead of the normal 83 days.

We first visited a bean field of 5,000 ha., of which 1,300 ha. were seeded late. The late-seeded crop was hit by frost on May 28. Yields of 800 kg/ha. are expected, which is about half of last year's yields and well below the norm of 1,800 kg/ha. Throughout this region, Gabriel sees yields ranging from 600 kg/ha. in the worst cases and 1,200 kg/ha. in the best cases.



Next, we visited an LRKB field that was seeded March 10, toward the end of the planting window. The crop is coming along nicely, but, with two weeks to go before the beans are cut, the humidity level will be tight. The expected yield is 1,300 kg/ha. The LRKB crop was hit by frost and this will impact yields, quality and especially caliber size.



LRKB con daño por helada

LRKB field showing frost damage.



Planting date 22/2, cut june 6
exp yield 800 kg/ha

In addition to farming, Desdelsur has the capacity to raise 80,000 head of cattle. At the time of our visit, the herd numbered 50,000. The photo below is of the feedlot. The feed lot originated out of Desdelsur's need to include corn in their crop rotation. Corn, however, is not an economically viable crop for this region because it is located too far from a port. Therefore, Desdelsur decided to raise cattle and use the corn to feed the animals. On their pastureland, the company utilizes a Brazilian system, the Santa Fe system, to protect the soil. This entails seeding megathermal grass together with corn crops. A herbicide is applied at a low dose to detain the growth of the grass. In this way, when the corn is harvested, the pasture has already been seeded.



L-R: Dan Smith, Norman Krause, Julie Krause, Roman Kutnowski and Alejandro Leloir visiting Desdelsur's feedlot.

JUNE 14: City of Salta

Argencrops

Ruta Provincial N° 53, KM 3,5
Las Pampitas, Perico, Jujuy
<https://argencrops.ar>

Contact:

Rita Villafañe, partner and
commercial manager
+54 388 686-4177
rita@argencrops.com.ar



ArgenCrops exports dry beans and other agricultural products. The company's processing plant is located in Perico, Jujuy. Rita Villafañe, partner and commercial manager, is a member of the Global Pulse Confederation's Young Professionals.

On the last night of our tour, Rita joined us for dinner in the City of Salta together with Mario Gerala, a bean grower from the Tartagal area (Northern subregion). They shared their perspective on this year’s bean crop, affirming what we had heard from others, and concurred with our conclusions.

VI. Production

Argentina’s dry bean production is mainly concentrated in the country’s northwest region, with most of it taking place in three distinct subregions: the southern subregion (where mostly black beans are grown as well as some DRKBs, LRKBs and mung beans); the central subregion (where mostly black beans are grown as well as DRKBs and LRKBs); and the northern subregion (where mostly alubia beans are grown as well as cranberry beans, mung beans, DRKBs and LRKBs).



Argentina’s three bean growing subregions: south (red circle), central (blue circle) and north (green circle).

	Southern	Central	Northern
Planting window	Jan. 5 – Feb. 20	Jan. 15 – Feb. 25	Feb. 10 – Mar. 20
Share of planted area	30%	30%	40%
Main bean classes	Mostly blacks, and also DRKB, LRKB and mung beans	Mostly blacks, and also DRKB and LRKB	Mostly alubia, and also cranberry, mung, DRKB and LRKB

Weather and production

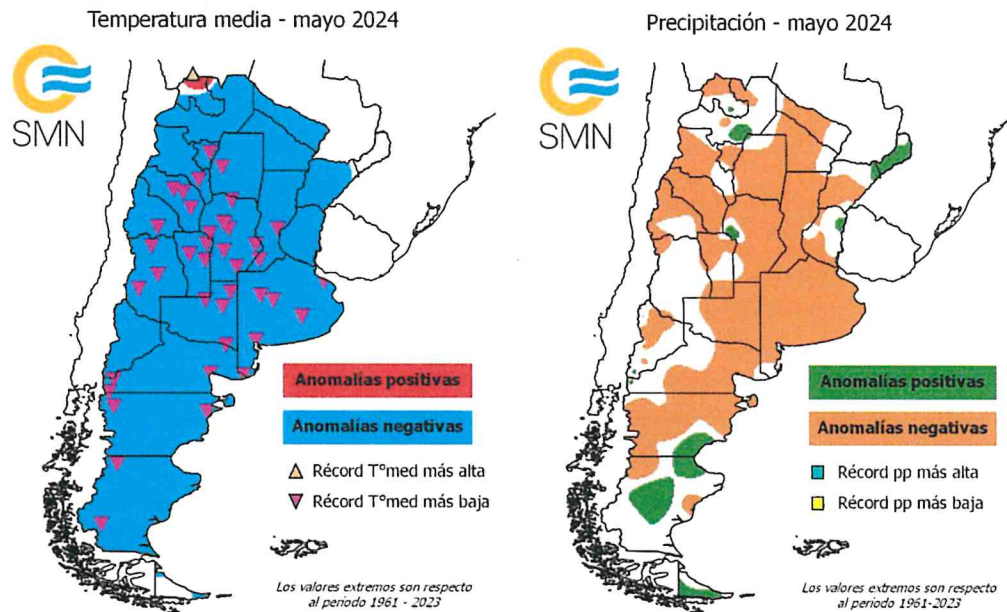
Because of dry conditions during the planting season, much of Argentina’s dry bean crops were planted late, either at the end of the seeding window or even later. (See [USDBC Argentina crop monitoring reports](#) for details). Although ample moisture in April improved

crop conditions, two major frost events hit the country's dry bean area in May, adversely impacting yields, caliber sizes and overall quality.

The first frost event, on May 18, affected the southern and central subregions. For a two-hour period, temperatures fell to -1 degree Celsius (30 degrees Fahrenheit), cutting short the growing cycle of late seeded bean crops that had not yet reached maturity. Crops seeded between late January and early February were not affected much, but those seeded later were damaged. New crop deliveries arriving at processing plants are showing 15-20% affectation, mainly on black beans and DRKBs.

The second frost event hit on May 28. For a six hour stretch of time, temperatures fell to -3 degrees Celsius (27 degrees Fahrenheit). In the southern and central subregions, this second frost decimated bean crops damaged by the first frost. In the northern subregion, some growers reported losses of as much as 40% on some lots.

The dry conditions at the start of the season and the frost events at the end significantly hurt yields this year. Some in the industry are calling it the worst dry bean harvest since 2013, at least for the northern subregion.

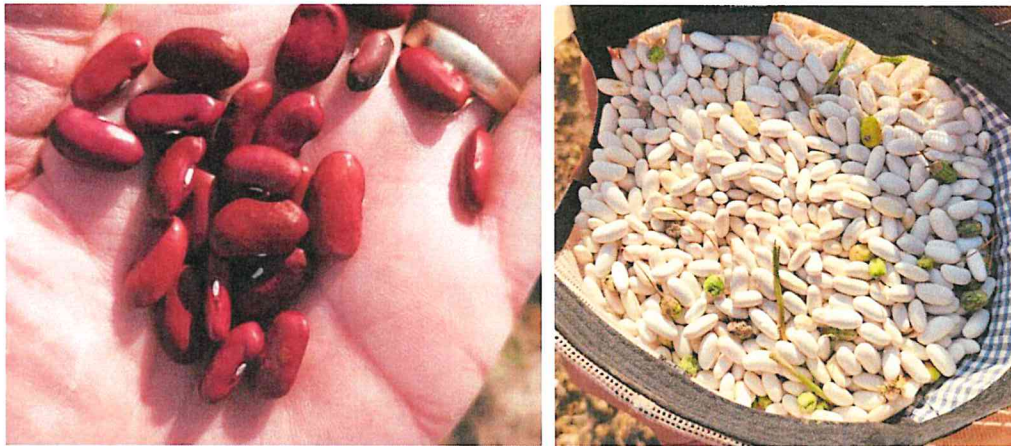


In May, average temperatures throughout the dry bean growing area (see map on left) were significantly below the norm. The map on the right shows precipitation anomalies.

Source: Argentina's National Meteorological Service, [May 24 climate brief](#).



Samples of Argentina's 2024 dry bean crop: LRKB, black beans and cranberry beans.



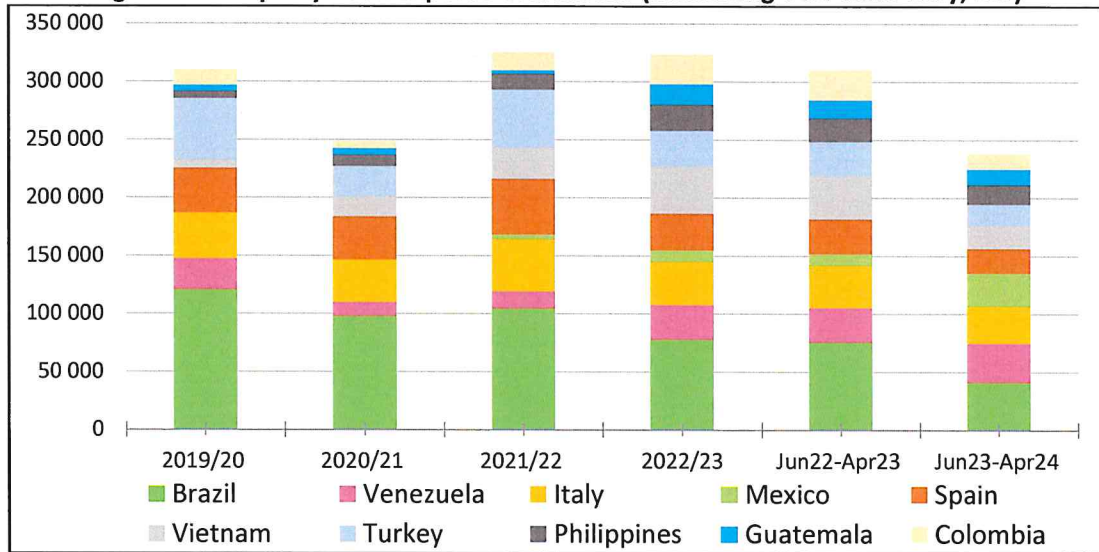
Samples of Argentina's 2024 dry bean crop: DRKB and alubia beans.

VII. Market Information

Exports

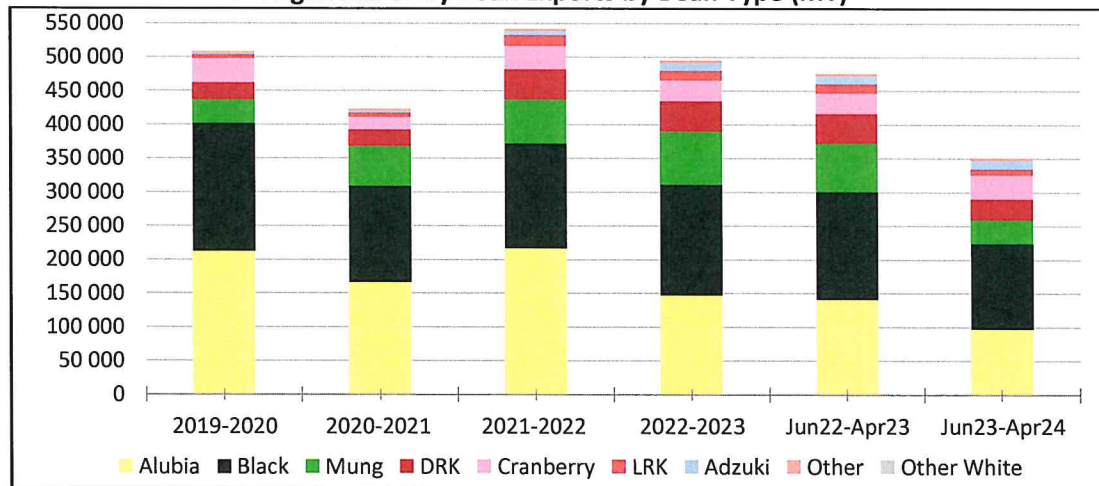
Argentina's marketing year runs from June through May. Thus far in MY 2023/24, from June 2023 through April 2024, Argentina exported 350,800 MT of dry beans, a 26% decrease compared to the same period the previous MY (475,796 MT). The top destinations for Argentine dry beans were Brazil (40,954 MT), Venezuela (33,372 MT), Italy (32,582 MT), Mexico (28,212 MT), Spain (21,315 MT), Vietnam (19,767 MT), Turkey (18,387 MT), the Philippines (16,440 MT), Guatemala (13,982 MT) and Colombia (13,290 MT).

Argentina's Top Dry Bean Export Destinations (Marketing Year June-May, MT)



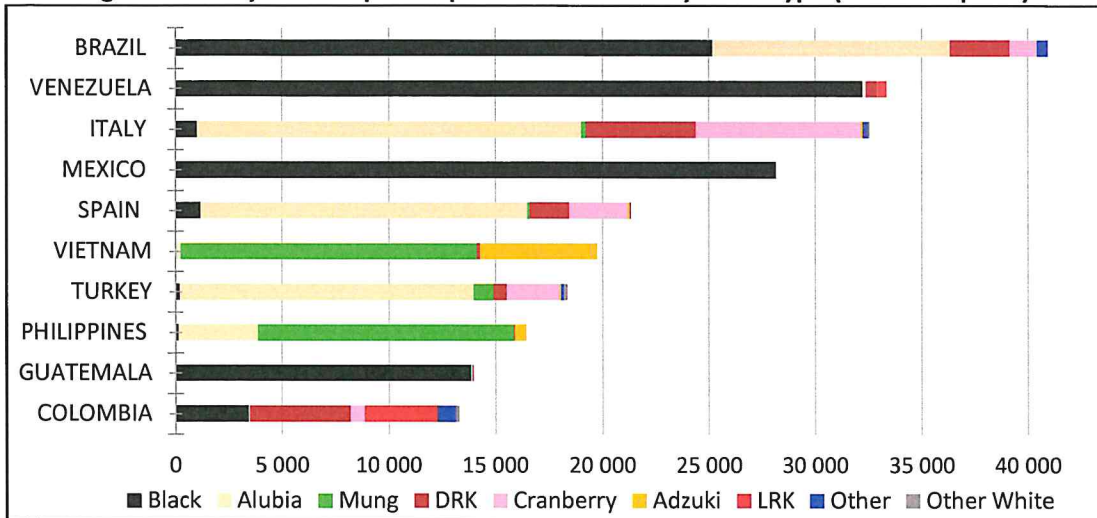
Source: Trade Data Monitor & Softrade

Argentina's Dry Bean Exports by Bean Type (MT)



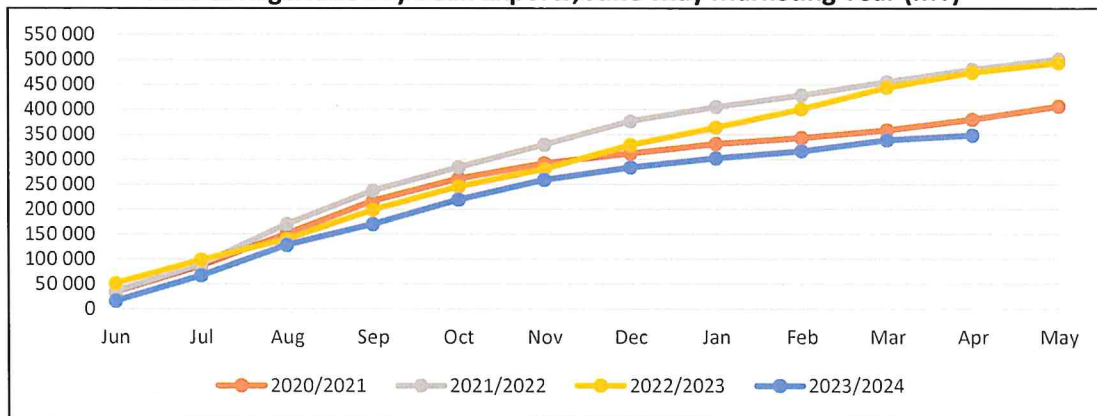
Source: Softrade

Argentina's Dry Bean Top 10 Export Destinations by Bean Type (June 22-Apr 23)



Source: Softrade

Pace of Argentine Dry Bean Exports, June-May Marketing Year (MT)



Source: Trade Data Monitor and Softrade

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