



# USDBC Mexico Report

2024 Mexico Crop and Market Update  
Week of October 15th – 24th update



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## 2024 Mexico Crop and Market Update - October

### 2024 USDBC Weekly Report - Week of October 15th – 24th update

#### 2024 Spring-Summer Bean Crop Cycle

##### Important Facts of the Spring-Summer Cycle for beans:

**Relevance:** Most important bean production season, contributing with 75% of the black and pinto beans for the year. Mexican beans are produced in two cycles: Spring-Summer and Fall Winter

**Planting:** IRRIGATED BEANS IN MAY-JUNE. DRYLAND BEANS IN JULY-AUGUST  
95% dryland: around 26% planted in June, 48% in July and around 15% in August. Remaining 10% irrigated planted in May and early June

**Harvesting:** Late September for the irrigated. October and November for dryland beans  
Most important states: beans in Mexico are planted in all states, however, the most important with commercial production, followed by the USDBC: Zacatecas, Durango, Chihuahua, San Luis Potosi and Guanajuato.

#### Situation until October 24th, 2024

**GENERAL:** Production is reportedly being adjusted down, as yields are smaller as it was expected, because of the lack of rain during the production stage in August-September. The government announced that production could be as low as 561 thousand MT. For now, pinto bean harvesting started, and soon, we will we will have more solid information in Report 2 of the USDBC Mexico bean crop Assessment.

**Guarantee Price only for Zacatecas:** The Government - SEGALMEX, announced last Monday Oct. 21st, a +30% increase on the Guarantee price for beans, passing from MX-\$21thousand / US\$1,105 to MX\$27 thousand / US\$1,421 per MT. This price benefit only the small producers, for up to 30 MT of rainfed beans or 15 MT of irrigated beans, only in the state of Zacatecas. Zacatecas government announced that there will be 40 appointed elevators that will pay the guarantee price, and until now, there are reportedly 25 already open. It is important to mention that although the government announced this increase, it will only be real after published in the federal register in November, when the budget is approved

Although not benefitting all, this price usually serves as reference, something that producers in Zacatecas and Durango were yearning for, as intermediaries were rapidly deteriorating prices, offering as low as MX\$18 thousand / US\$947 per MT.

**Durango was left out of the Guarantee Price Program for beans,** and producers and agricultural organizations, are asking the new President Claudia Sheinbaum and the new Secretary of Agriculture Julio Berdegue, to reconsider this decision, and include the beans from Durango.



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**2025 FALL-WINTER BEAN CYCLE is starting.** Although the planting intention has not been announced, it is expected that around 30% of the FW beans have been planted in Sinaloa. Most important states in this cycle are Sinaloa -yellow and some pintos-, and Nayarit – Jamaica black, pintos and azufrados. The state of Sinaloa reported that they approved permits for the planting of 60 thousand hectares of dry beans, mainly yellow beans Azufrado, Mayocoba, and possibly pinto beans again, -in 2024, they planted 10 thousand hectares of Pinto Saltillo for the first time ever, with very good results.

### Previously until Oct. 15th

**Zacatecas est. planted 485,900 has** – Reportedly, irregular precipitations expected to cause yield damage in 15% of the beans planted, expecting yields of 150 to 300 kilos/ha for the lowest, and from 500 to 700 kg/ha the highest. Most damaged bean districts were: Cañitas de Felipe Pescador, Sain Alto, border with Miguel Auza (col 20 de noviembre, Manantial de la Honda, Emilio Carranza) and Sombrerete (colonia Hidalgo).

It is estimated that 10% of the beans, -pintos and colored-, have been cut and will be harvested in the next few days. Black beans, around 60% are turning yellow, to be harvested by the end of October.

**Durango est. planted 117,770 has.** – Reportedly, at the time when rains stopped, black beans were in the blooming stage, causing production damage, bean plants have low pod and grain count, with yields estimated from 200 to 500 kg/ha. Shorter cycle pinto beans, were able to survive the lack of precipitations and had a normal production. In some areas, only pinto beans are being cut. For black beans, they will start cutting until the last week of October, and yields are expected from 300 to 700 kg/ha.

**Chihuahua est. planted 39,600 has** – Precipitations were insufficient, and reportedly, 97% of the dryland beans are damaged-lost, some with zero pods. The least damaged are under-developed and will be used for forage. Irrigated beans, -13,000 hectares planted, 40% has been cut and will be harvested in the next few days.

**Guanajuato est. planted 39,100 has.** – Reportedly, dryland beans yields could be from 500 to 1,100 kg/ha. Black beans predominate in 80% of the fields.

**San Luis Potosí est. planted 60,600 has.** – Reportedly, 70% of the beans are bayo beans and 10% colored beans. Yields expected from 300 to 650 kg/ha.

**PRICES:** Starting prices paid to producers in Durango, Guanajuato and San Luis, are low, around MX\$18,000 / US\$973 per MT. Only bayos are being paid at over MX\$20,000 / US\$1,081 per MT.



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-According to Report 1 of the Mexican bean crop assessment, around 713 thousand hectares were planted this season in the five bean states: Zacatecas 485,900 has; Durango 117,770 has; Chihuahua 39,600 has; San Luis Potosi 60,600; Guanajuato 39,100 has. 89% planted on-time, within the recommended dates, contrasting with the last previous years, when most of the SS-beans were planted late July-August, after the recommended dates.

- Varieties estimation:
  - 55%- or 371,300-hectares black beans
  - 38%- or 254,400 hectares pinto beans
  - 7%- or 50,500-hectares colored beans
- National estimation is 811 thousand hectares planted, with similar variety distribution:
  - 55%- or 482,600-hectares black beans
  - 34% or 297,000 hectares are pinto beans
  - 11%- or 101,800-hectares colored beans

**-Report 2 of the USDBC 2024 Mexico Spring-Summer bean planting assessment will resume soon, to have a better crop condition-production estimation, as most beans are now in the final production stage.**

## MEXICO NEWS CLIPPINGS

*USDBC Disclaimer: In the following section the USDBC disseminates information published in Newspapers and Magazines related to beans (excerpts). The statements or numbers shown in each article are not necessarily in agreement with the USDBC.*

### **Mexico Announces Food and Agriculture Plan that Could Take the Country Back to the 1980s**

Associated Press Updated Tue, October 22, 2024 at 5:33 PM CST 4 min read

MEXICO CITY (AP) — Mexico's new president announced an agriculture plan Tuesday that could make the country's food production and distribution look a lot more like it did in the 1980s, when meals in Mexico were dominated by tortillas, beans, instant coffee and cheap hot chocolate.

Four decades ago, the ingredients for those meals were often bought at government stores that stocked a few basic goods.

President Claudia Sheinbaum pledged Tuesday to revive those often shabby, limited government stores and continue efforts to achieve "food sovereignty."

Sheinbaum appears to have a deep interest in boosting beans. On Monday, she said, "It is much



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better to eat a bean taco than a bag of potato chips.»

Agriculture Secretary Julio Berdegué said the focus would be on guaranteeing prices for farmers who grow corn used for tortillas and lowering tortilla prices by 10% after prices jumped a couple of years ago.

The government aims to boost bean production by about 30% in six years to replace imports of beans, and will set up research centers to supply higher-yielding bean seeds.

“Self-sufficiency in beans is a goal the president has set for us,” Berdegué said.

The government will also focus on supporting coffee production, but mainly for instant coffee, which it claims is used by 84% of Mexican households. The plan will also seek to support cocoa production, but mainly for powdered baking and hot chocolate, not fine chocolate bars.

The policies appear to run counter to market trends and what Mexican food sales look like today, when consumption of most of the old basics has fallen.

Most Mexicans today shop at modern grocery stores, and consumption of fresh ground coffee, not instant, has increased enormously, accompanied by a boom in specialized coffee chains and shops.

Meanwhile, bean consumption has been dropping precipitously for decades in Mexico.



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According to the government's "2024 Agricultural Panorama" report, Mexicans consume only about 17 pounds (7.7 kilograms) of beans annually. That's less than half of the 35.2 pounds (16 kilograms) consumed per year in 1980.

A combination of factors, including the time it takes to cook dried beans, may be behind this. Amanda Gálvez, a researcher at Mexico's National Autonomous University, wrote that "we look down at beans because it is considered 'the food of the poor,' and we are making a serious mistake," because beans are a good source of protein.

However, the health benefits aren't clear: The most common bean recipe in Mexico — refried beans — often contains a considerable dose of lard.

Tortilla consumption has also fallen from nearly 220 pounds (100 kilograms) per capita annually in 2000 to about 165 pounds (75 kilograms) in 2024. Consumers have increasingly taken to buying bread and other bakery products instead of tortillas.

Apart from the challenge of trying to change consumer habits, the policy also runs counter to market trends. While some countries are trying to encourage high-value varietal and specialized chocolate strains, Mexico is focusing on the cheapest products.

While chocolate was first exported to the rest of the world from Mexico, Mexico's own production has fallen dramatically because of plant diseases and a lack of investment. It dropped from almost 50,000 tons in 2003 to about 28,000 tons in 2022.

And while most Mexican homes may have a jar of instant coffee in their cupboards, that's not where the tendency — or consumer spending — is headed. According to a Technavio industry report, instant products accounted for only about 37% of the sales value of coffee in Mexico.

Sheinbaum's focus on self-sufficiency in oil, energy and foodstuffs is a holdover from her predecessor and political mentor, former President Andrés Manuel López Obrador, who left office on Sept. 30.

López Obrador also appears to have passed on his nostalgia for a 1970s-style Mexico — including passenger rail service, state-owned industries, tight-knit families and small corner stores — to Sheinbaum.

The agriculture plan comes one day after Sheinbaum announced a complete "junk food" ban on salty, fried, processed snacks or sweetened beverages and soft drinks in schools, starting within six months.

But the government's track record in actually changing consumer behavior is poor, columnist Javier Tejado wrote Tuesday in the newspaper *El Universal*. He reminded readers that the government banned junk food advertisements aimed at children in 2014.

"The result after ten years of prohibitions?" Tejado wrote. "Things are worse than when they started in 2014; Mexicans have decided to keep consuming things they like."