
MERKATO
Agribusiness Intelligence

Our Passion for
U.S. Agricultural Commodities
Drives Everything We Do

Representing US Dry Bean Industry
Since 2018

REGIONAL IN-MARKET REPRESENTATION

Agribusiness Intelligence

Our **Method**

Agribusiness Intelligence

MARKET DEVELOPMENT

+

1 Market Research

- Regulatory Framework
- Domestic Production
- Market Prices
- Imports & Exports
- Market Competitors
- Consumer Insights and Trends

2 Market Access

- Trade Policy Issues Analysis
- Market Access Plan
- One-on-one Meetings with qualified buyers
- Executive Visibility
- Food Trade Shows & Events
- Guaranteed Trade Leads
- Trade Missions
- In-country field Visits and Industry Tours

3 Market Promotion

- Branded Strategy and Identity
- Multichannel Campaigns and Marketing Assets
- In-store Promotions
- Digital Marketing
- Virtual Trade Events
- Video Productions and Storytelling
- Media Management and Press Releases
- Website and Content Development

4 Market Education

- Event Marketing
- Seminars
- Webinars
- On-site Training
- Workshops
- Congress
- Conferences
- Demonstrations

5 Market Results

- Exports
- Market Share
- Brand Awareness
- Success Stories
- English Narrative Reports

-

PACKAGED WITH GOODNESS

FREE FROM THE REST

No additives/ preservatives

2g of plant protein/fiber per serving

Vegan

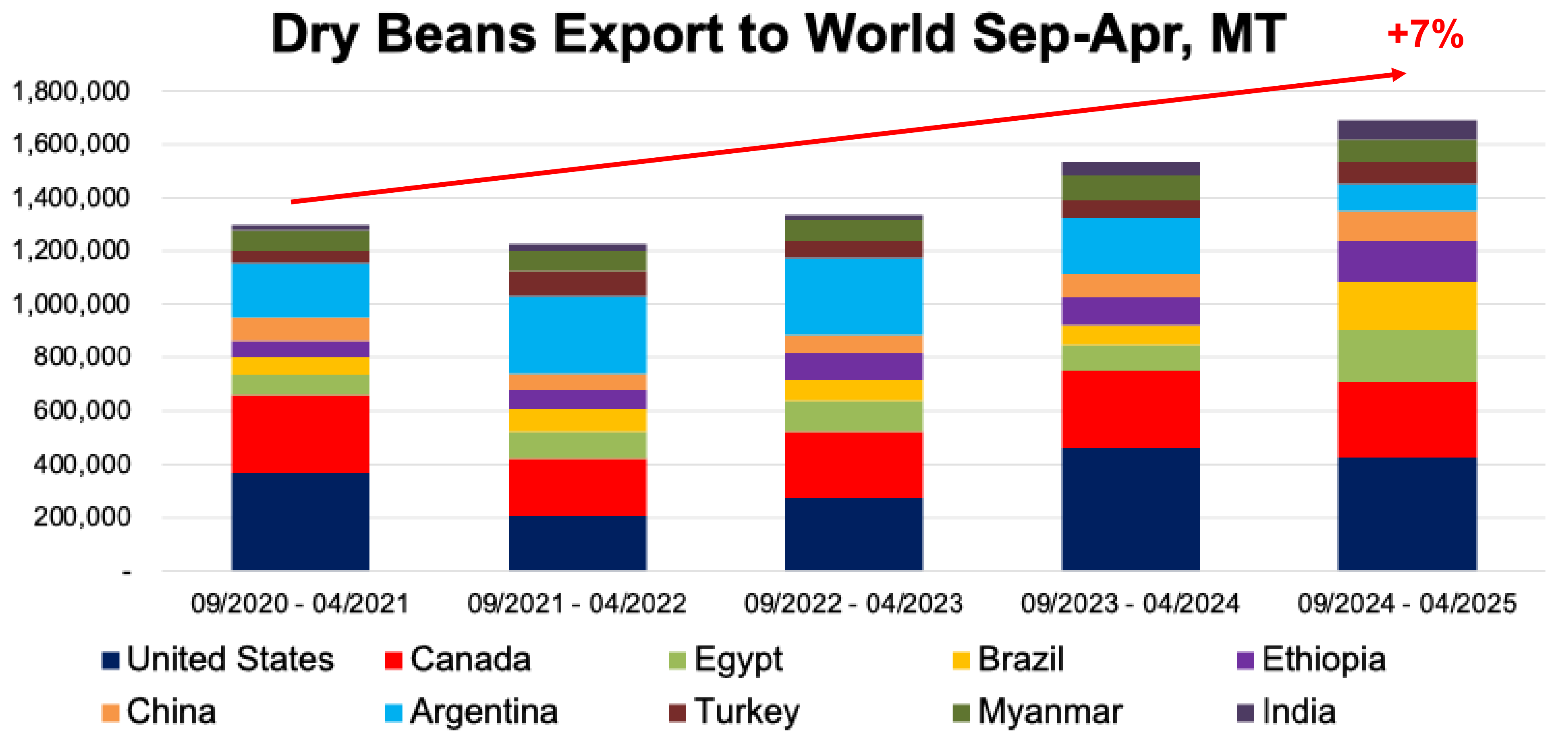
Sugar Free

Gluten Free

Plant Based

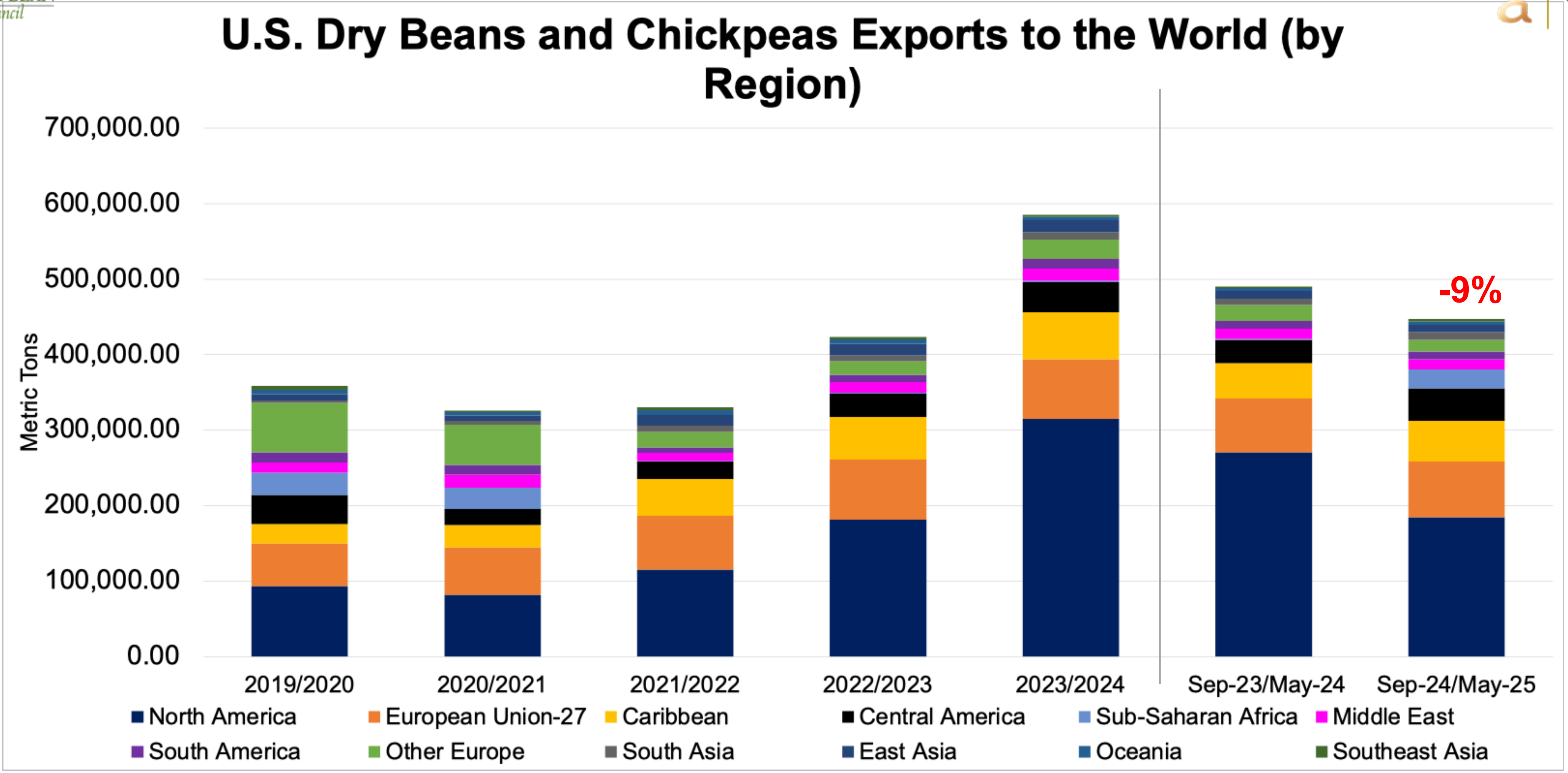
DRY BEANS MARKET UPDATE

US DRY BEAN Council



Source: TDM

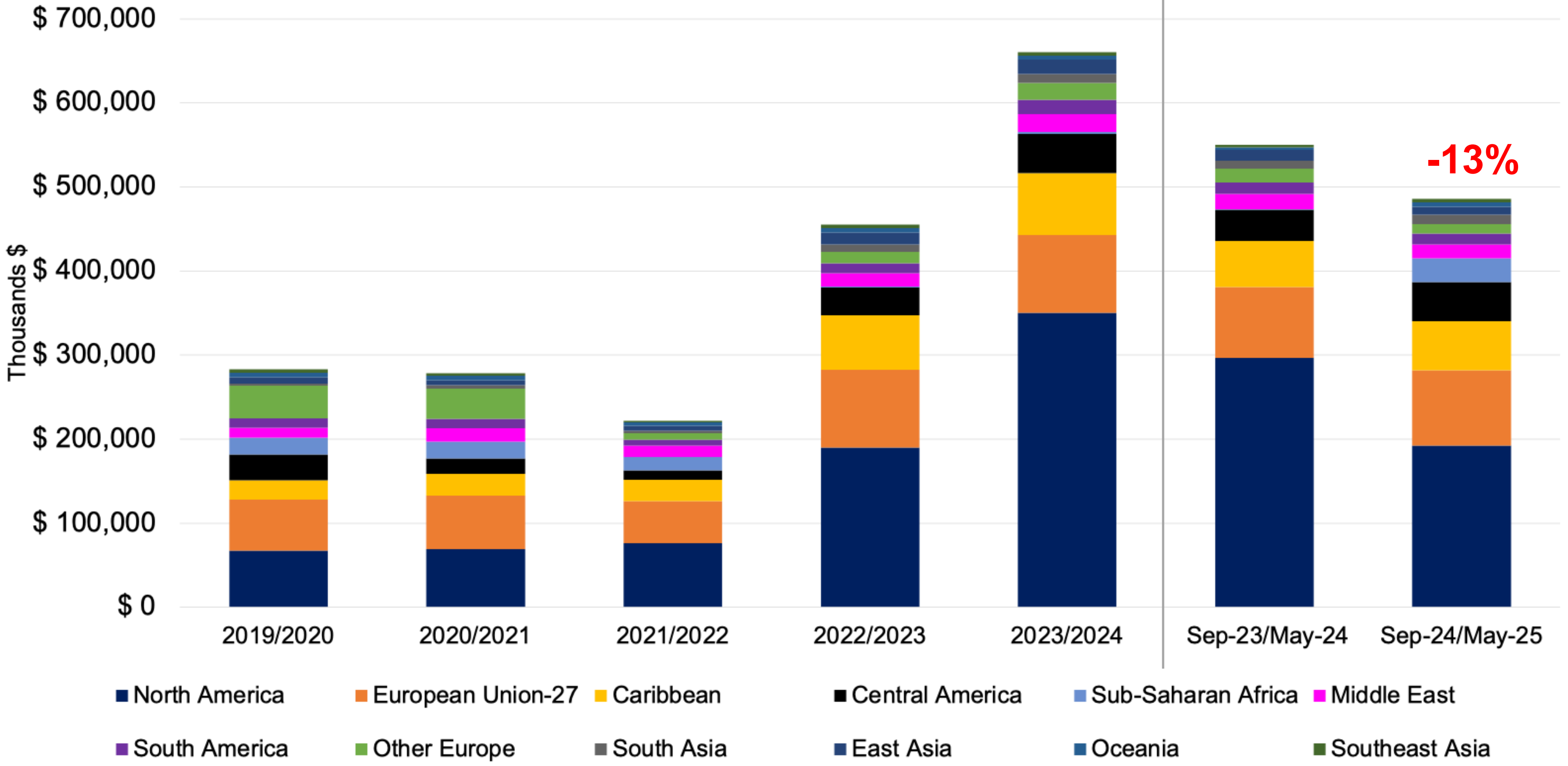
Global dry bean exports reached nearly **1.9 million metric tons** from Sep 2024 to Apr 2025—marking **a 7% year-over-year** increase and signaling a recovery in global trade dynamics. Despite this overall growth, the **U.S. experienced an 9% decline in exports**, **reducing its market share to 15%,** followed by Canada with 10%



Source: USDA GATS

U.S. dry bean and chickpea exports totaled **447,504 metric tons**, reflecting a **9% decline** compared to the same period last year (**494,127 MT**)

U.S. Dry Beans and Chickpeas Exports to the World (by Region)



Source: USDA GATS

As of May 2025, U.S. dry bean and chickpea exports totaled **$486.3 million**, reflecting a **13% decline** compared to the same period last year (**$555.8 million**). The sharpest contractions occurred in **North America (-35%)**, **East Asia (-30%)**, and **Europe (-32%).**

Partner	2024 Value	2024 Qty	2025 Value	2025 Qty	Period/Period % Change (Value)	Period/Period % Change (Qty)
North America	**$ 269,448**	**243,815**	**$ 178,609**	**166,761**	**-34%**	**-32%**
Mexico	$ 228,837	201,445	$ 140,943	131,062	-38%	-35%
Canada	$ 40,610	42,370	$ 37,666	35,699	-7%	-16%
Caribbean	**$ 54,693**	**46,755**	**$ 57,929**	**53,768**	**6%**	**15%**
Dominican Republic	$ 41,507	36,297	$ 43,222	41,984	4%	16%
Haiti	$ 5,950	5,100	$ 5,700	5,116	-4%	0%
Jamaica	$ 3,046	2,571	$ 4,387	3,474	44%	35%
French West Indies(*)	$ 2,118	1,503	$ 2,049	1,035	-3%	-31%
Netherlands Antilles(*)	$ 737	454	$ 958	709	30%	56%
Leeward-Windward Islands(*)	$ 365	255	$ 897	977	146%	283%
Cuba	$ 430	244	$ 316	128	-27%	-48%
Trinidad and Tobago	$ 380	257	$ 151	144	-60%	-44%
Barbados	$ 69	25	$ 117	116	69%	367%
Bahamas, The	$ 38	19	$ 85	62	125%	237%
Turks and Caicos Islands	$ 40	21	$ 31	18	-23%	-14%
Bermuda	$ 8	8	$ 13	5	64%	-34%
Cayman Islands	$ 5	1	$ 4	1	-15%	-51%

Source: USDA, GATS
September - May

	2024		2025		Period/Period % Change (Value)	Period/Period % Change (Qty)
Partner	Value	Qty	Value	Qty		
Central America	**$ 36,367**	**30,191**	**$ 45,858**	**42,257**	**26%**	**40%**
Costa Rica	$ 23,283	18,593	$ 27,384	24,554	18%	32%
Guatemala	$ 6,277	5,342	$ 10,795	9,900	72%	85%
Panama	$ 4,450	3,587	$ 5,380	4,577	21%	28%
El Salvador	$ 1,799	2,189	$ 1,909	2,874	6%	31%
Nicaragua	$ 0	-	$ 209	160	--	--
Honduras	$ 505	384	$ 163	160	-68%	-58%
Belize	$ 52	95	$ 20	33	-63%	-65%
South America	**$ 11,002**	**7,997**	**$ 11,404**	**9,035**	**4%**	**13%**
Colombia	$ 7,474	5,282	$ 6,916	4,936	-7%	-7%
Venezuela	$ 0	-	$ 2,370	2,200	--	--
Peru	$ 2,961	2,340	$ 923	957	-69%	-59%
Chile	$ 137	103	$ 828	632	503%	516%
French Guiana	$ 298	154	$ 181	80	-39%	-48%
Ecuador	$ 125	107	$ 164	218	31%	105%
Suriname	$ 0	-	$ 19	11	--	--
Guyana	$ 0	-	$ 3	2	--	--
Brazil	$ 6	12	$ 0	-	--	--

Source: USDA, GATS
September - May

US DRY BEAN Council

Agribusiness Intelligence

Partner	2024 Value	2024 Qty	2025 Value	2025 Qty	Period/Period % Change (Value)	Period/Period % Change (Qty)
European Union-27	**$ 65,721**	**56,191**	**$ 66,582**	**54,820**	**1%**	**-2%**
Italy(*)	$ 45,759	40,299	$ 39,510	33,680	-14%	-16%
Spain	$ 5,760	4,491	$ 6,022	4,018	5%	-11%
Netherlands	$ 3,350	3,049	$ 5,753	5,365	72%	76%
Belgium-Luxembourg(*)	$ 2,679	2,004	$ 4,852	3,646	81%	82%
France(*)	$ 1,884	1,415	$ 3,574	2,784	90%	97%
Germany	$ 2,723	2,029	$ 3,327	2,273	22%	12%
Poland	$ 1,624	1,376	$ 1,662	1,530	2%	11%
Portugal	$ 1,313	1,031	$ 750	600	-43%	-42%
Croatia	$ 442	363	$ 476	389	8%	7%
Hungary	$ 123	80	$ 403	260	227%	225%
Greece	$ 0	-	$ 122	139	--	--
Denmark	$ 65	54	$ 91	77	40%	41%
Austria	$ 0	-	$ 39	59	--	--
Other Europe	**$ 16,301**	**20,997**	**$ 11,302**	**14,900**	**-31%**	**-29%**
United Kingdom	$ 15,847	20,718	$ 11,276	14,873	-29%	-28%
Albania	$ 0	-	$ 23	21	--	--
Iceland	$ 0	-	$ 3	6	--	--
Switzerland(*)	$ 454	280	$ 0	-	--	--

Source: USDA, GATS
September - May

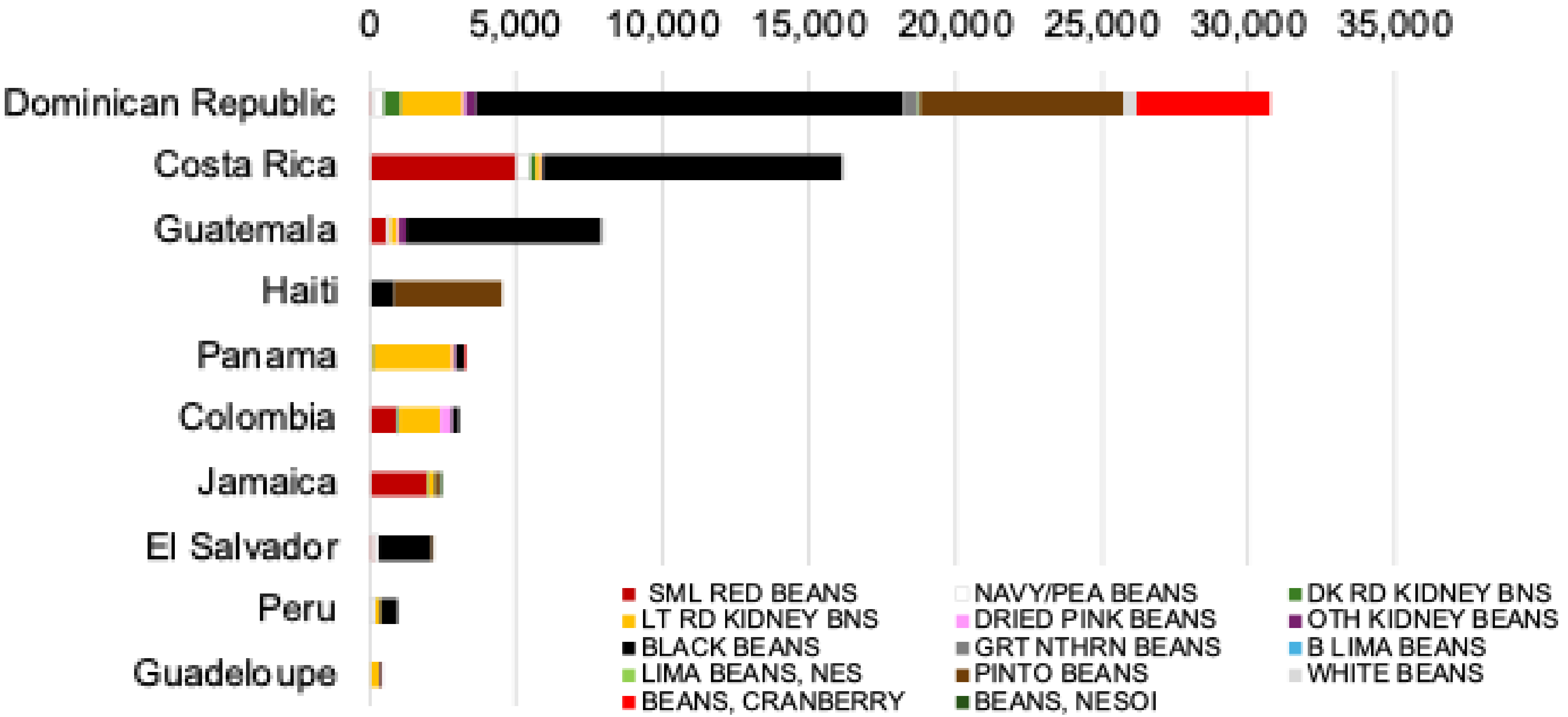
US DRY BEAN Council

Agribusiness Intelligence

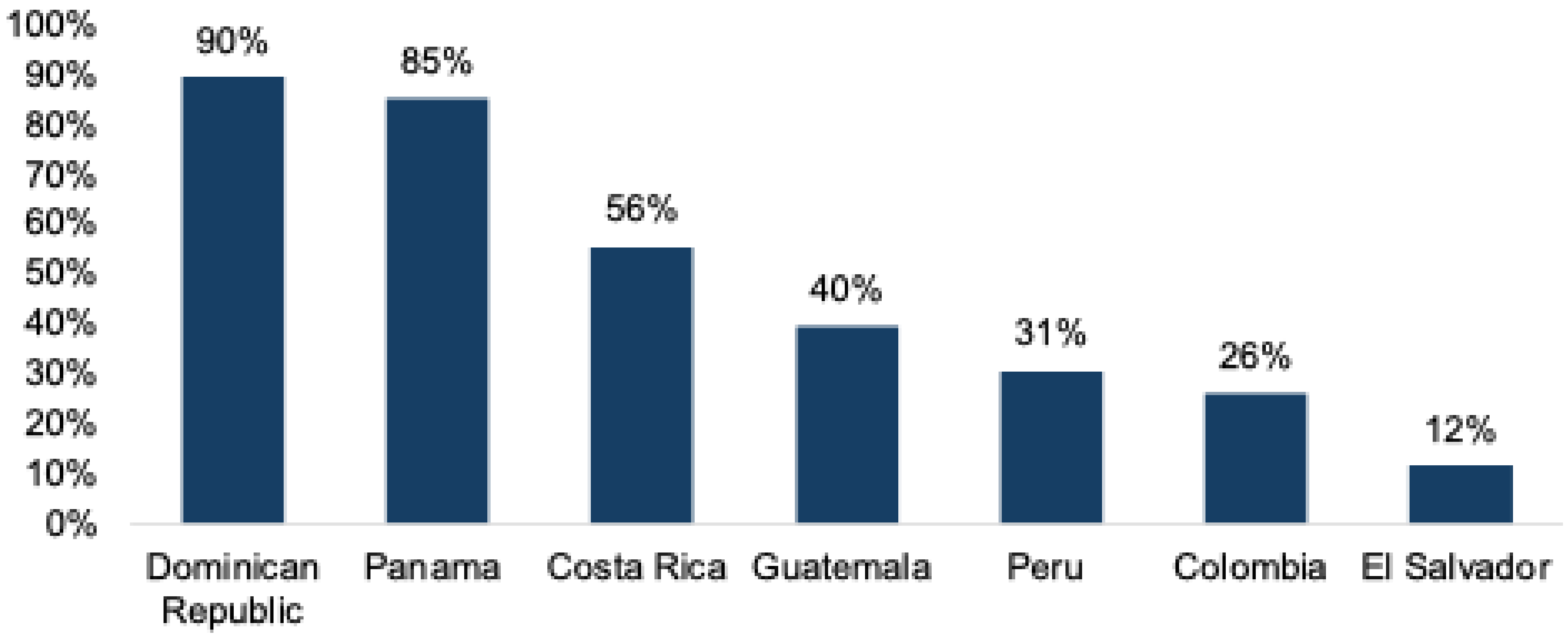
Partner	2024 Value	2024 Qty	2025 Value	2025 Qty	Period/Period % Change (Value)	Period/Period % Change (Qty)
Sub-Saharan Africa	**$ 993**	**835**	**$ 28,002**	**25,027**	**2720%**	**2896%**
Middle East	**$ 8,955**	**6,348**	**$ 4,326**	**3,166**	**-52%**	**-50%**
United Arab Emirates	$ 6,385	4,448	$ 1,932	1,656	-70%	-63%
Israel(*)	$ 292	193	$ 1,232	849	322%	341%
Saudi Arabia	$ 1,848	1,392	$ 651	316	-65%	-77%
Turkey	$ 313	201	$ 344	263	10%	31%
Iraq	$ 17	9	$ 87	45	417%	429%
Kuwait	$ 55	43	$ 68	29	24%	-32%
Qatar	$ 8	6	$ 11	8	35%	24%
Lebanon	$ 36	57	$ 0	-	--	--
East Asia	**$ 11,317**	**9,401**	**$ 6,158**	**6,457**	**-46%**	**-31%**
Korea, South	$ 2,697	2,546	$ 2,488	2,542	-8%	--
Japan	$ 2,423	1,989	$ 2,336	2,026	-4%	2%
China	$ 5,864	4,668	$ 744	1,230	-87%	-74%
Taiwan	$ 0	-	$ 308	488	--	--
Hong Kong	$ 332	199	$ 281	171	-15%	-14%
Oceania	**$ 3,051**	**3,044**	**$ 4,643**	**4,204**	**52%**	**38%**
Southeast Asia	**$ 2,250**	**1,621**	**$ 3,247**	**2,285**	**44%**	**41%**
Philippines	$ 863	559	$ 1,811	1,326	110%	137%
Vietnam	$ 768	636	$ 652	420	-15%	-34%
Malaysia	$ 470	320	$ 485	273	3%	-15%
Thailand	$ 138	91	$ 185	156	34%	73%
Laos	$ 0	-	$ 114	110	--	--
Burma	$ 10	15	$ 0	-	--	--
South Asia	**$ 2,240**	**1,891**	**$ 184**	**185**	**-92%**	**-90%**

Source: USDA, GATS
September - May

US Dry Bean Exports, by Bean Type (Sep2024- Apr 2025, MT)



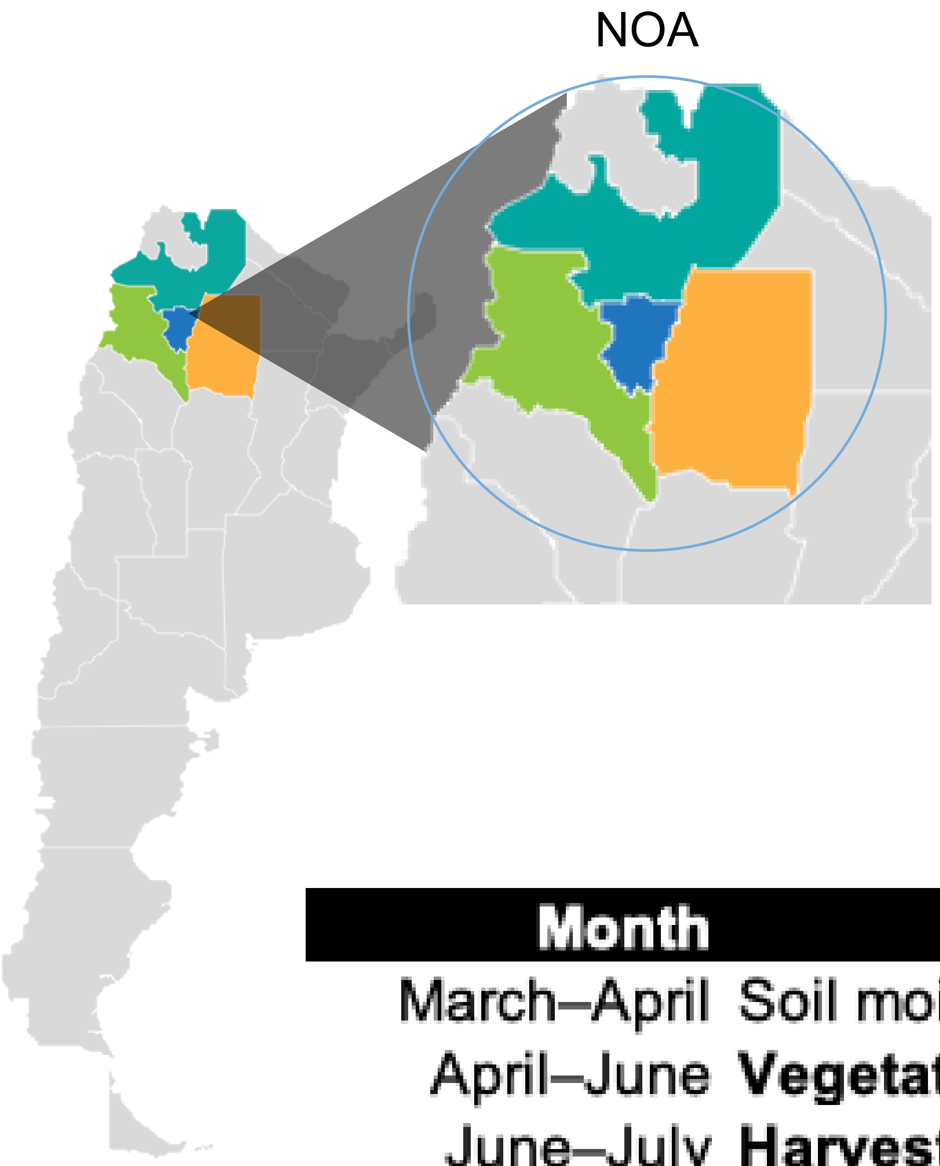
U.S. Market Share in Top Destination Markets LATAM (Sep 2024 - Apr 2025)



Source: Own Elaboration

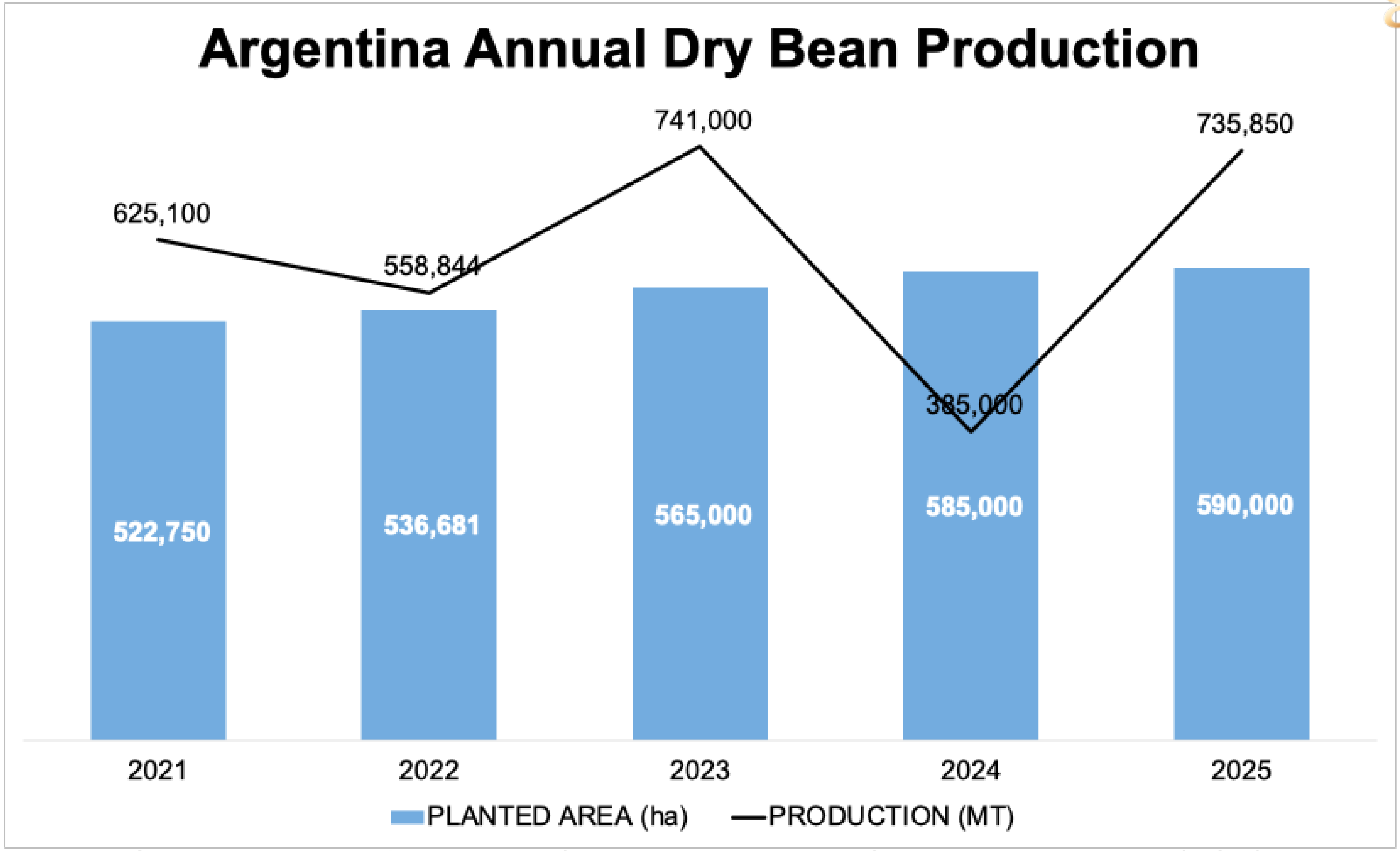
ARGENTINA

Dry Bean Production Report
2025 Crop



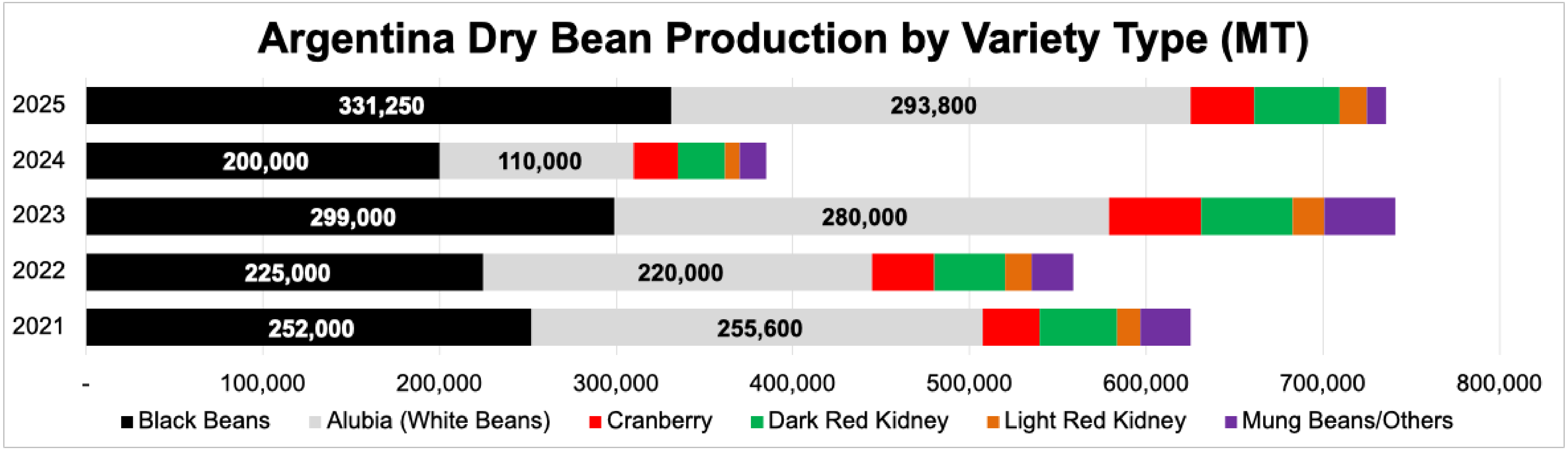
- Argentina is one of the top global exporters of dry beans, especially to Latin America, Europe, and North Africa.
- The Northwest (NOA) region—including Salta, Jujuy, Tucumán—is the heart of production, representing over 90% of national output.
- Top Varieties: Black beans, Cranberry, Light Red Kidney, and Alubias.
- Export Focus: Around 80–90% of production is exported, with black and alubia beans leading exports.

Month	Activity
March–April	Soil moisture allows **planting**
April–June	**Vegetative growth**, pod filling (50–75 days to maturity)
June–July	**Harvest**, with main activity June–mid-July and final late July



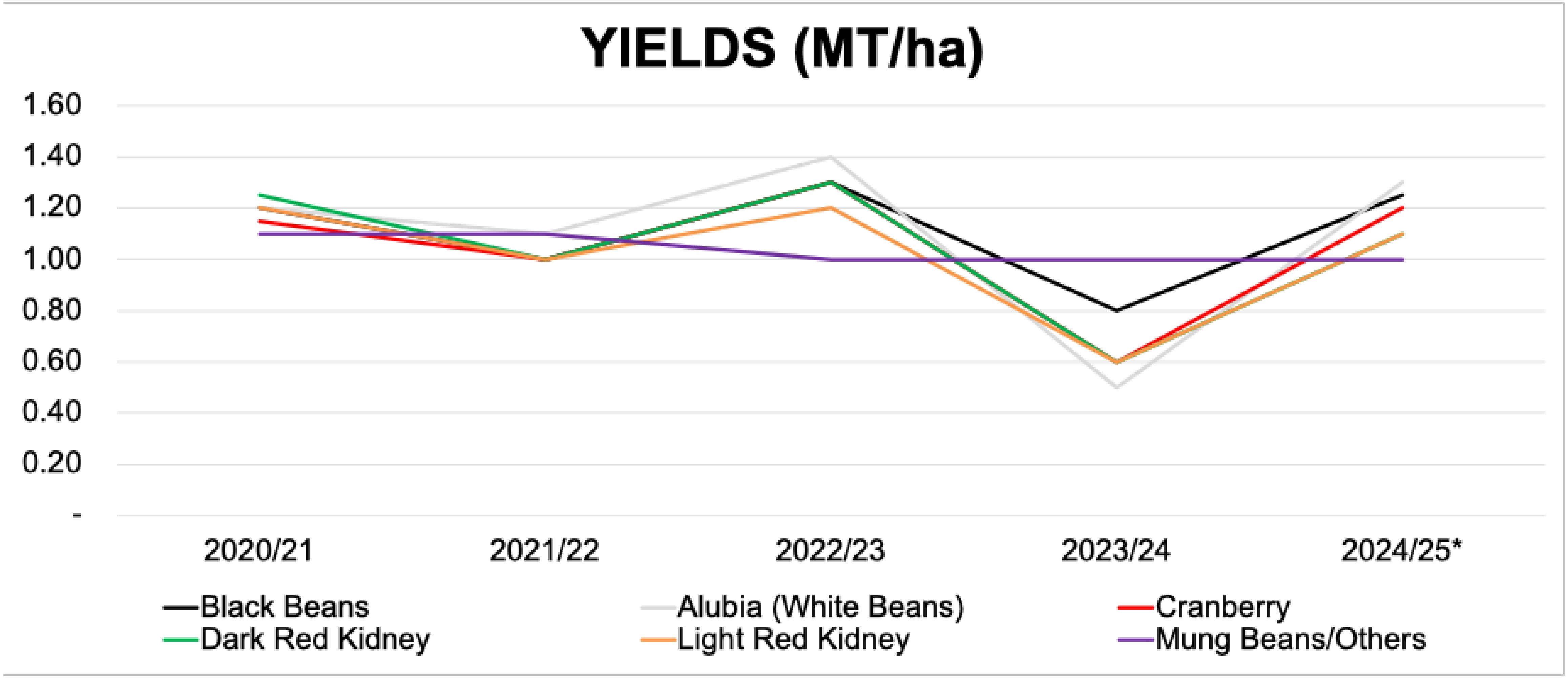
Source: Argentina's Ministry of Economy, Bolsa de Comercio de Rosario (BCR).

Argentina's dry bean production **is projected to 735,850 metric tons in 2025**, nearly doubling last season's drought-impacted output of **385,000 MT**.



Source: Argentina's Ministry of Economy, Bolsa de Comercio de Rosario (BCR).

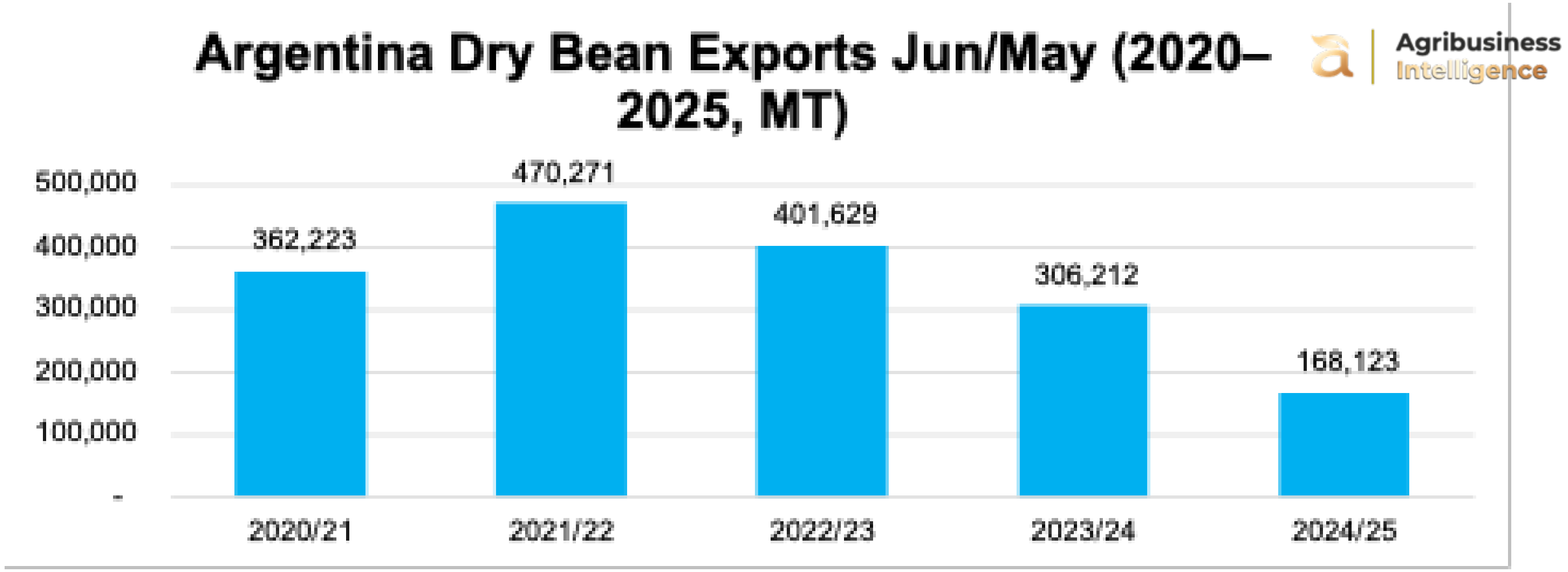
Black beans and alubia are driving Argentina's 2025 dry bean recovery, with production reaching 331,250 MT and 293,800 MT**, up 66% and 167%,** respectively, compared to 2024. Other key varieties such as Dark Red Kidney and Light Red Kidney also rebounded sharply, both growing **by 83%**



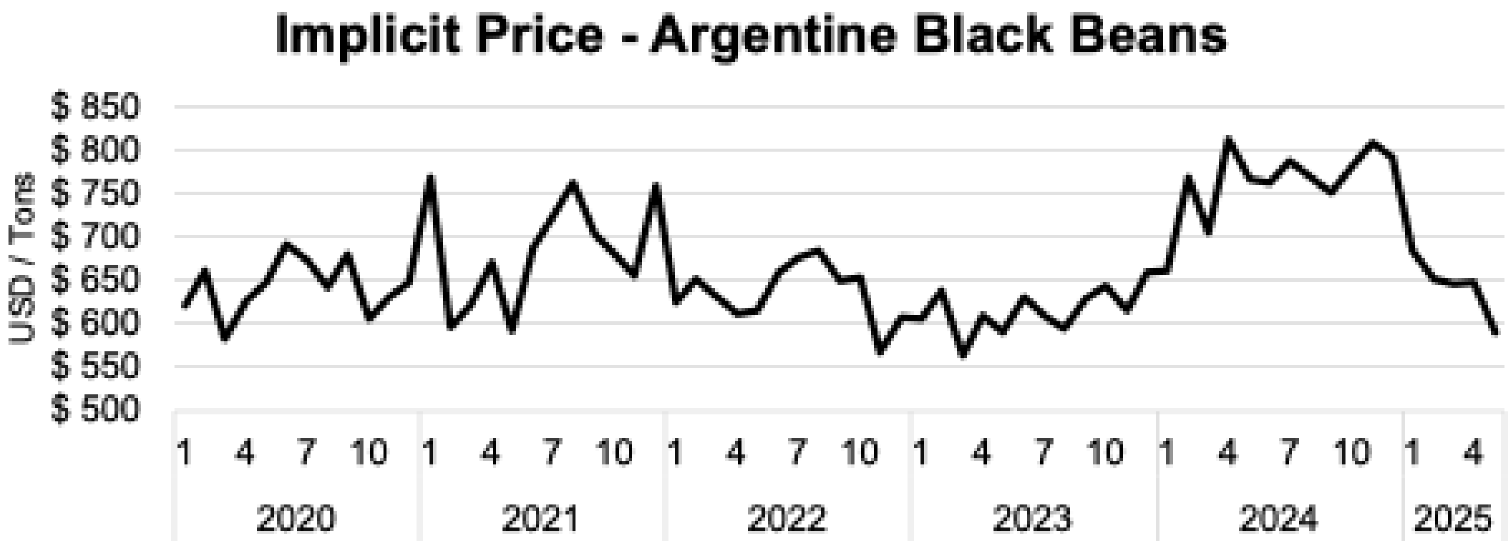
Source: Argentina’s Ministry of Economy, Bolsa de Comercio de Rosario (BCR).

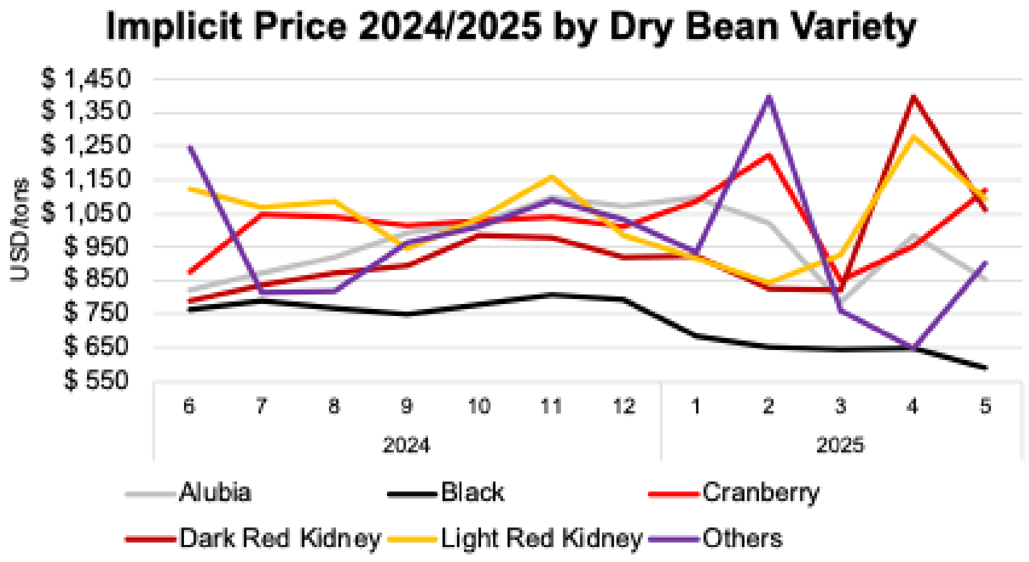
Argentina’s dry bean exports in 2024 fell to **168,123 MT,** marking the lowest level in five years. This sharp decline was a direct consequence of the 2024 harvest, severely impacted by frost, drought and heat stress.

Argentina's top five dry bean export destinations declined. Brazil, which fell from over 100,000 MT to under **20,000 MT in 2024.**



Source: TDM

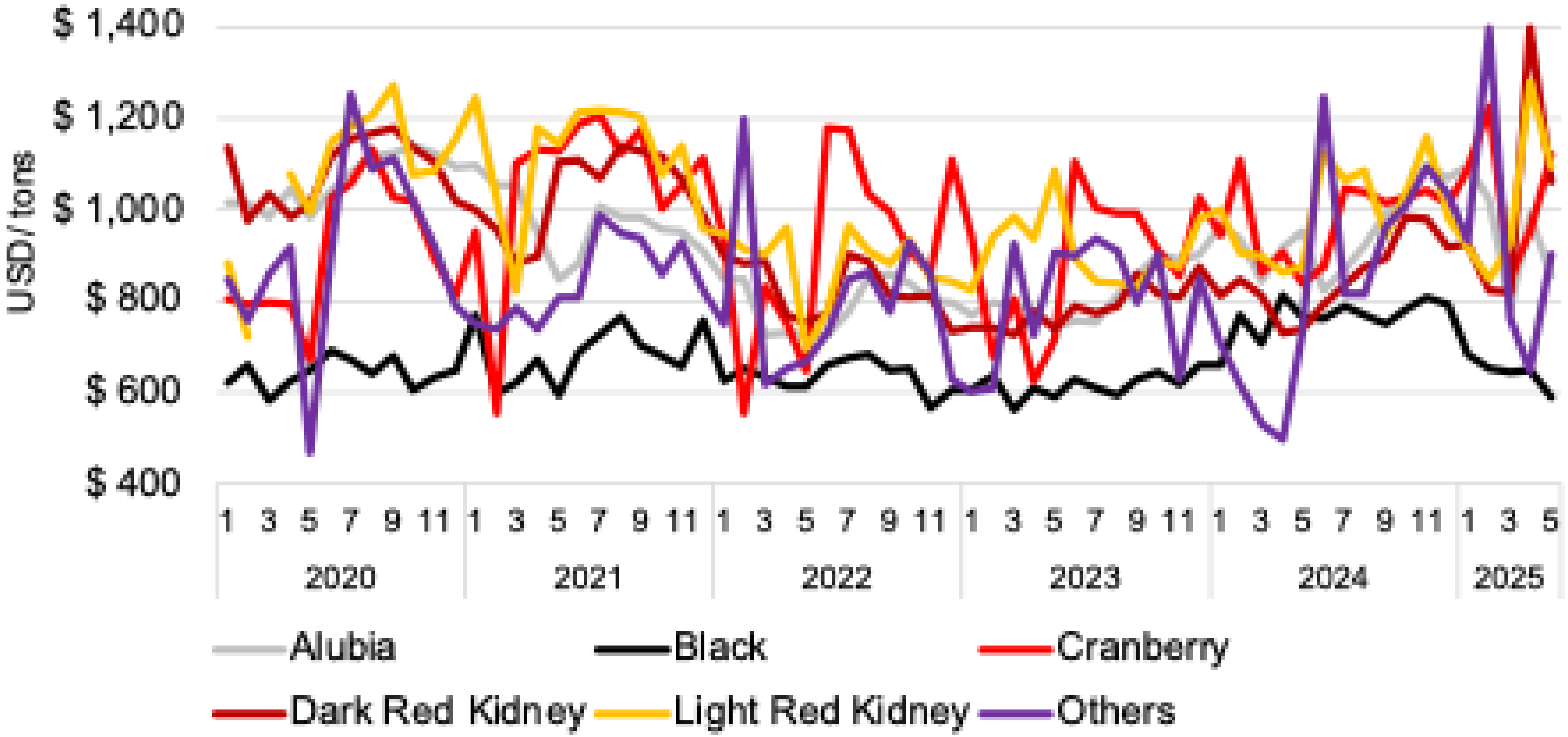




Prices for different bean varieties in Argentina showed notable fluctuations, **Alubia** peaking in January 2025 **($1,096). Black beans** saw a steady downtrend, **dropping to $589 by May 2025**.

Source: Own Elaboration

Implicit Price 2020-2025 by Dry Bean Variety



Source: Own Elaboration


Argentina/Brazil Harvest Tour 2025




RICHIGER
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BRAZIL

Dry Bean Production Report
2024/2025 Crop

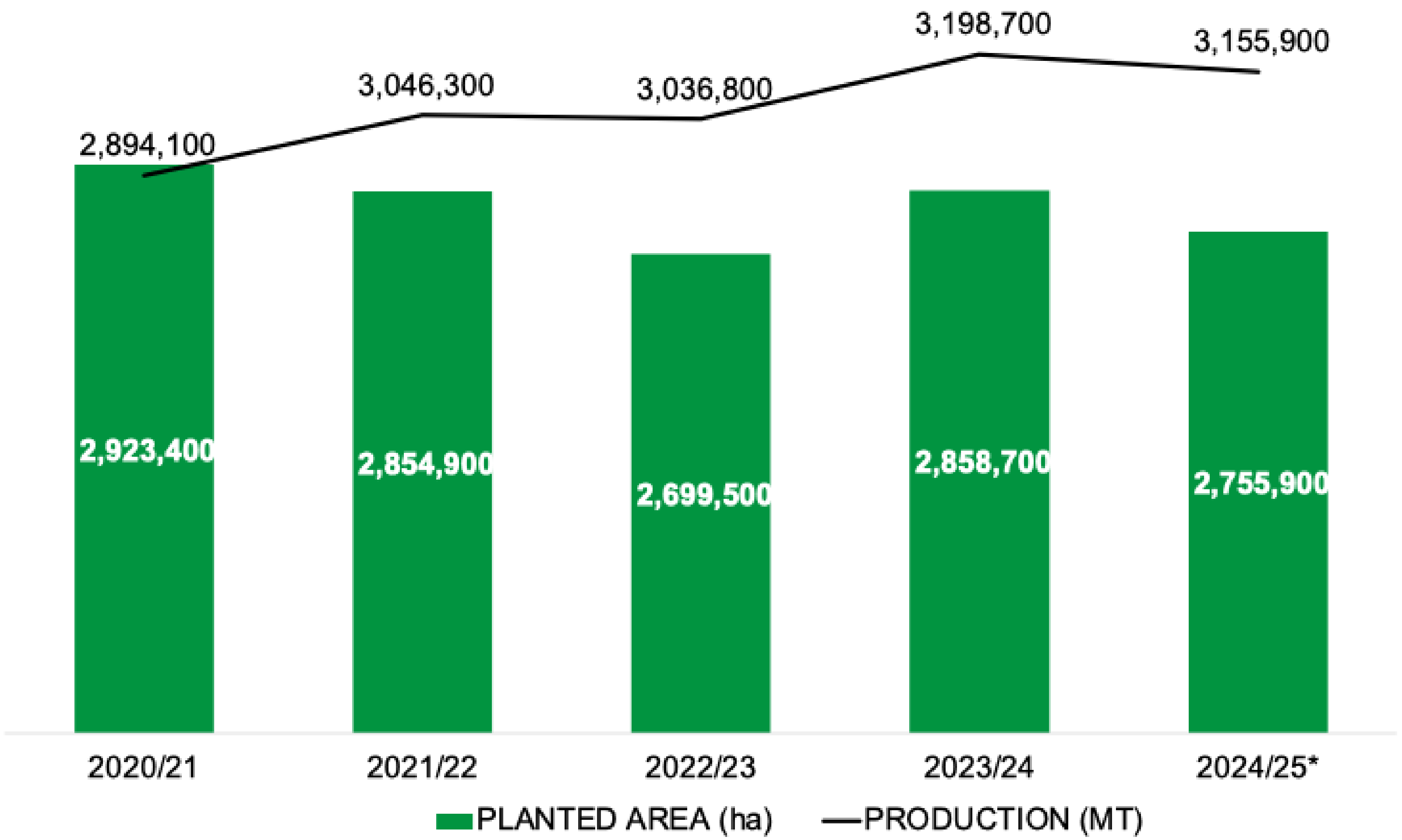
- Brazil is one of the world's top producers and consumers of dry beans, with strong domestic demand and **a growing export footprint.**
- Production is spread across multiple regions, with key producing states including **Paraná, Minas Gerais, Goiás, São Paulo, and Bahia.**
- Brazil has three annual crops, known as:

  1st Crop (Primavera): Planted September–December, harvested December–February.

  2nd Crop (Safrinha): Planted January–March, harvested April–June.

  3rd Crop (Irrigated/Winter): Planted May–July, harvested August–September.
- Top Varieties include: Carioca beans (a type of pinto), Black beans, and smaller volumes of Rajado and White beans.
- Export Focus: While Brazil prioritizes domestic consumption, black beans dominate exports.

Brazil Annual Dry Bean Production

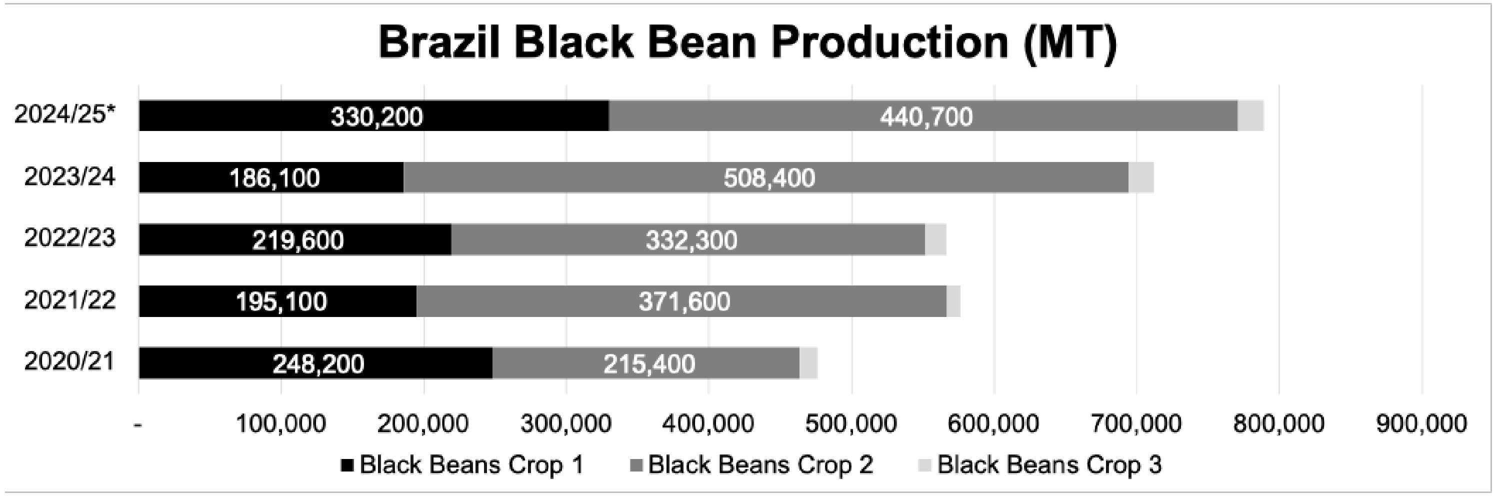


Source: CONAB

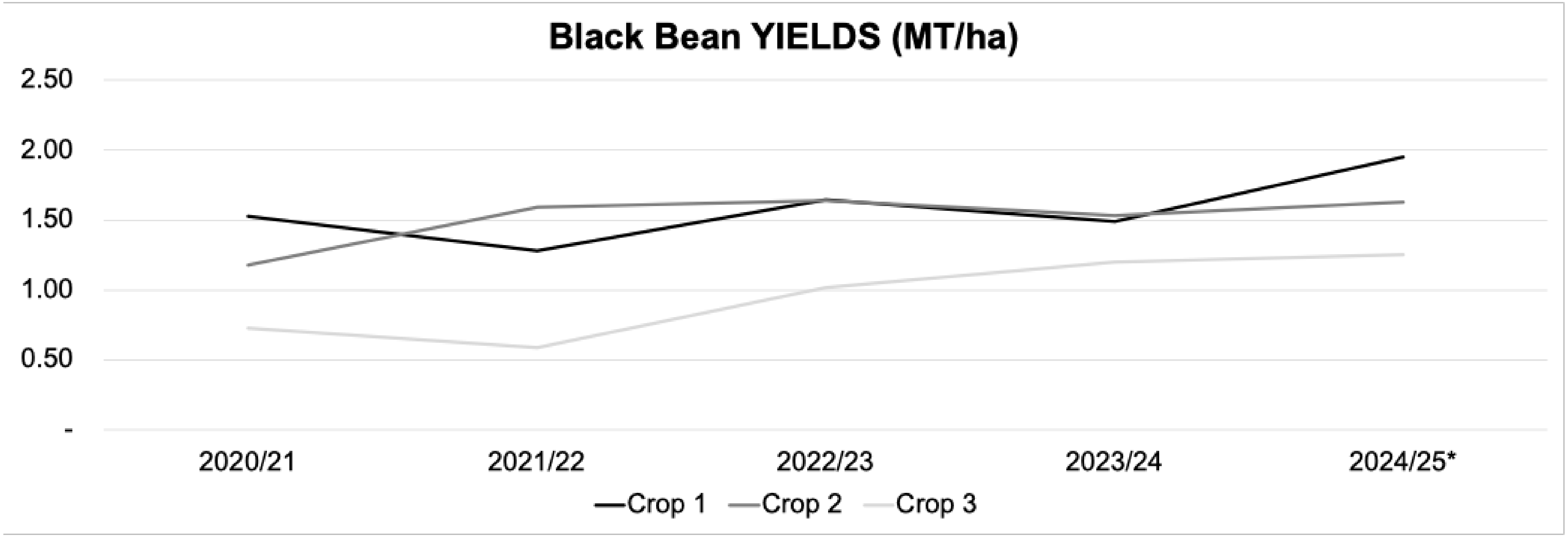
Brazil's dry bean production for 2024/25 is projected at **3.16 million metric tons**, showing a slight decrease of 4% and a moderate reduction in planted area to 2.76 million hectares.

PRODUCTION (MT)

Bean Type	Crop	2020/21	2021/22	2022/23	2023/24	2024/25*	GWT
Caupi Beans	Crop 1	119,900	188,700	151,700	184,900	139,700	-24%
	Crop 2	468,600	430,500	365,900	427,500	470,400	10%
	Crop 3	35,300	37,700	37,000	34,700	38,000	10%
Black Beans	Crop 1	248,200	195,100	219,600	186,100	330,200	77%
	Crop 2	215,400	371,600	332,300	508,400	440,700	-13%
	Crop 3	12,000	9,700	14,600	17,400	18,200	5%
Others	Crop 1	608,400	555,100	585,500	571,400	592,800	4%
	Crop 2	454,000	557,300	577,500	530,400	467,200	-12%
	Crop 3	732,300	700,600	752,700	737,900	658,700	-11%
	Total	2,894,100	3,046,300	3,036,800	3,198,700	3,155,900	-1%
Caupi Beans		623,800	656,900	554,600	647,100	648,100	0%
Black Beans		475,600	576,400	566,500	711,900	789,100	11%
Others		1,794,700	1,813,000	1,915,700	1,839,700	1,718,700	-7%



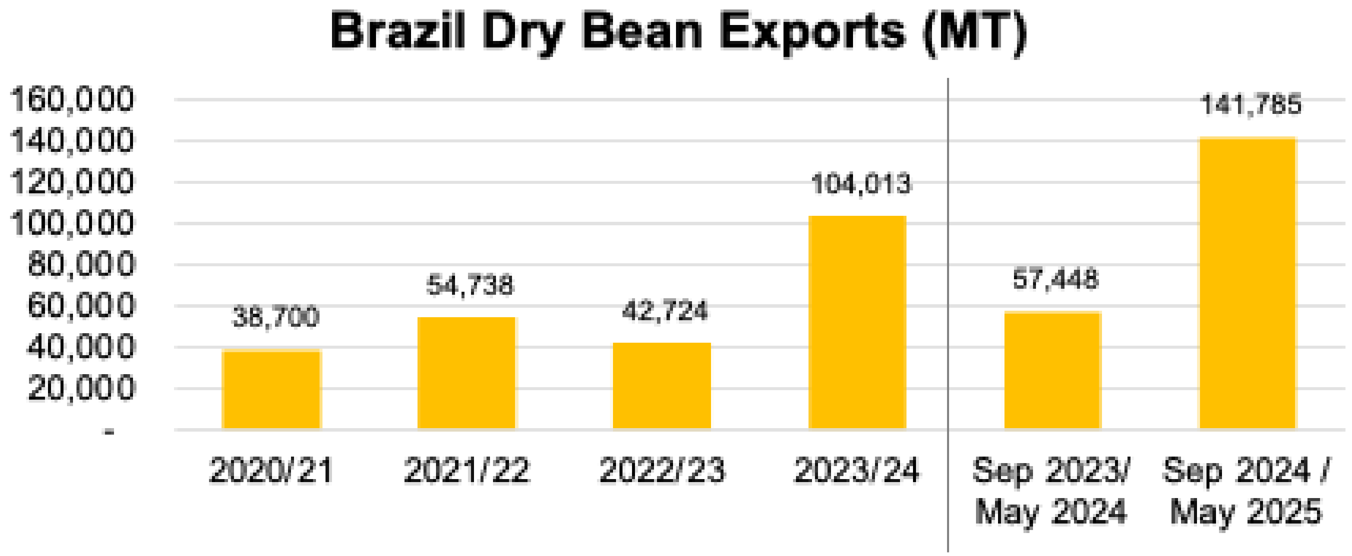
Source: CONAB

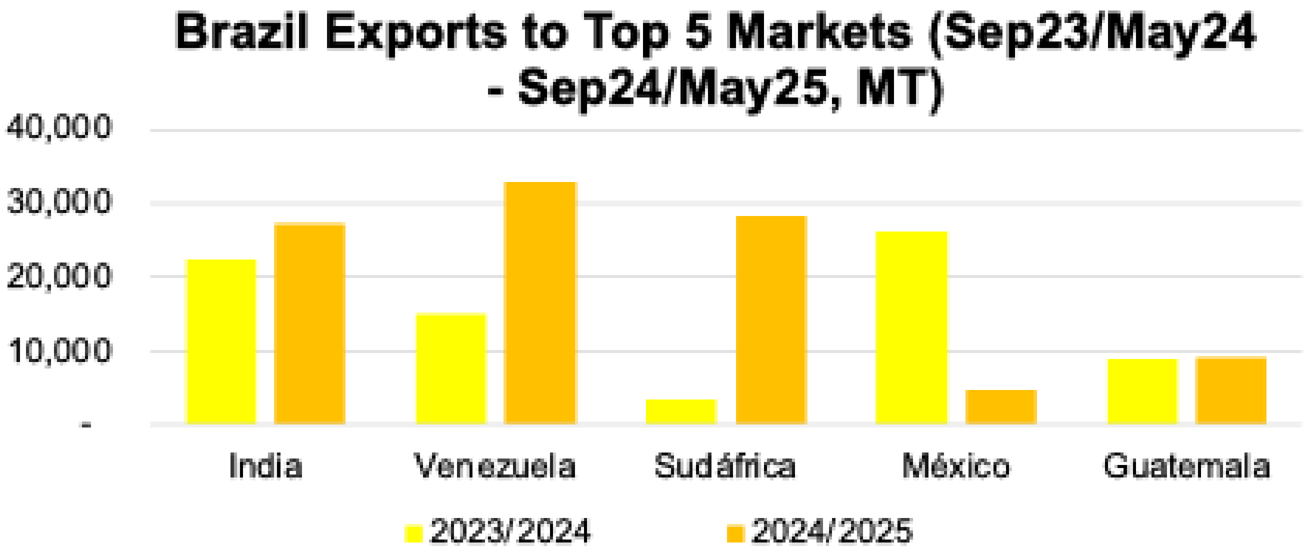


Source: CONAB

Brazilian dry bean exports reached 141,785 tons in 2024/25, representing a 147% increase in the comparable period.

Brazil's dry bean exports were led by Venezuela (32,928.30 t), followed by South Africa (28,533.20 t) and India (27,927.61 t) together accounting for over 60% of total shipments. Secondary markets included Guatemala (9,041.91 t) and Portugal (8,620.47 t), while Pakistan (7,048.14 t) and Mexico (4,609.20 t).



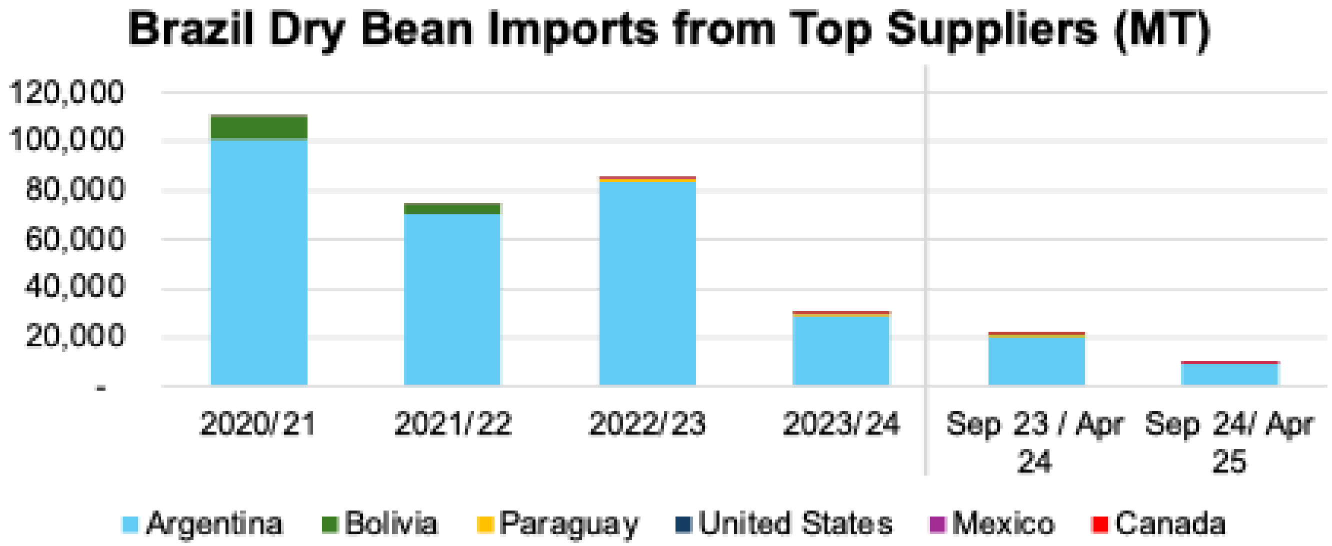


Source: CONAB

Source: Own Elaboration

Yearly volatility was significant, with monthly fluctuations exceeding 60% in some periods. Early 2025 figures suggest around **800 USD/ton - 600 USD/ton.**

In 2024/2025, dry bean imports from Argentina fell to **168,123 MT**, marking a **45% year-over-year decline** and the lowest volume in the five-year period.



Source: CONAB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What the U.S. Dry Bean Industry Must Know

US DRY BEAN Council

US DRY BEAN Council

Agribusiness Intelligence

AR ARGENTINA

Production Recovery Confirmed, but Not Without Risk

- Stakeholders across Salta and Tucumán confirmed that dry bean production for 2024/25 will nearly double year-on-year, reaching over 700,000 MT, especially in black, alubia, and DRK beans.
- However, quality variability is expected due to non-uniform pod development, delayed rainfall, and variable moisture at harvest.

Exporters Are in Urgent Need of Cash Flow

- Argentine exporters uniformly acknowledged their intent to sell aggressively during June–August to recover liquidity.
- Offers are already as low as $850–$1,050/MT FOB for black beans and even lower for small reds and LSKs. This creates high downward pressure on global pricing.

Structural Gaps in Quality Management Persist

- Companies do not always standardize moisture or color sorting pre-export. Some lots presented grain stains, chalkiness, or size variability.
- Exporters rely on the buyer to specify technical standards—this creates an opportunity for the U.S. to differentiate based on consistency and traceability.

Stakeholders See the U.S. as a Premium Benchmark, But Inflexible

- Argentine traders respect U.S. beans but perceive them as too expensive and slow-moving. In institutional tenders, Argentina's price and flexible terms are winning—even when U.S. quality is superior.

BR BRAZIL

Brazil's Small Red Beans Are Entering Export Channels

- Processors in Paraná and Santa Catarina are actively contracting small red bean production and investing in cleaning and polishing equipment.
- Brazilian companies aim to establish year-round export capability, particularly to Central America and Caribbean markets.

Three-Crop System Gives Brazil a Competitive Edge

- Brazil's Safrinha crop (April–June) and irrigated 3rd crop (Aug–Sept) allow flexible market timing.
- Exporters are well-positioned to respond faster to price signals and supply gaps than Argentina or the U.S.

US DRY BEAN Council

Agribusiness Intelligence

Domestic Market Still Prioritized—But Cracks Are Opening

- While Brazil remains a heavily domestic market, processors are seeking new export outlets as internal demand plateaus.

Export-Grade Infrastructure Remains Inconsistent

- Not all Brazilian processors meet export documentation or spec consistency. However, larger firms are now hiring QC managers and modernizing post-harvest handling—especially in Santa Catarina.

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