



U.S. Dry Bean Council Update

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Caribbean Office**

Contents

- **Introduction – Americas programs**
- **U.S. Exports to the Region**
- **Production overview: Argentina, Brazil, Central America**
- **ENSO forecast for 2024 and its effect in the region**



Introduction – Americas

Programs

Americas Programs: Trade Missions



- Business meetings
- Visit the local production areas
- Marketing channels and trends
- Learn about the local culture



Caribbean



Colombia/Panama

Americas Programs: Harvest Tours and Market Research



Argentina Harvest Tour

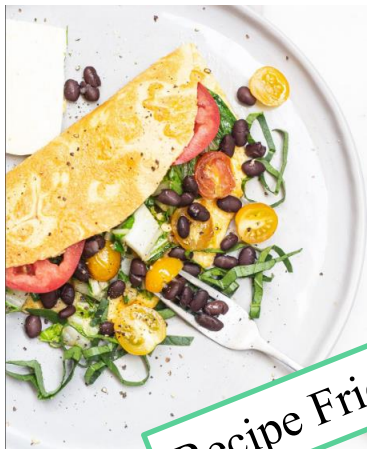


U.S. – Cuba Ag Conference



Pulses International Summit – Brazil

Social Media: Todo Con Frijol



Recipe Friday



Chef Talks

Promote other activities



FIBRA	
Frijoles	5.6g fibra
Yuca	0.7g fibra
Papa	2.4g fibra
Zanahoria	8.6g fibra
Brocoli	7.7g fibra
Pepino	3.3g fibra

1/2 Taza
Cantidad de fibra en



Nutrition

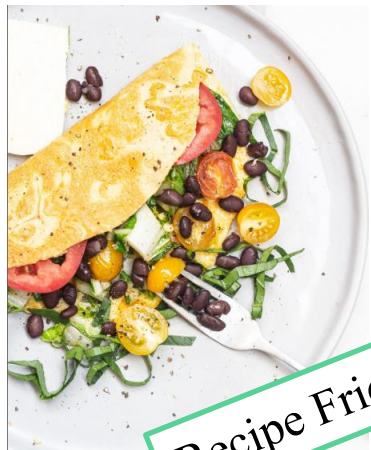


Sustainability



Emprendimiento frijol cooking contest

Social Media: Todo Con Frijol



Recipe Frijol



NEW! Data Frijol Project with Chelsea Didinger. Responding to audience demand of scientifically based data. Starting in August 2023.

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1/2 Taza
Cantidad de fibra en

ANÁLISIS: nutricional de porciones de 100 Miliculator

Nu

... other activities



MEDELLÍN, COLOMBIA
FEBRUARY 15-17, 2023



...ndimiento frijol
...g contest

Seminars & Promotional Activities



EMP Funded seminars, 2022,
CR, DR, GUA, ES
Innovation and Technical training
for new product development



EMP Funded seminars, 2023,
Barranquilla, Medellin, Bogota
Value Proposition and
Product Development






Dry Bean Exports



Production Overview: Argentina, Brazil, Central America



Dry Bean Production: Argentina

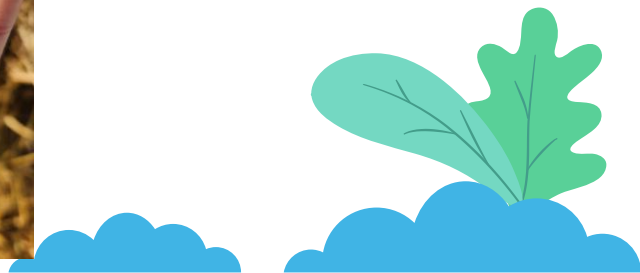
- In the Northwest, where dry beans are grown, weather patterns and planting times differ considerably from the Pampean region.
 - During the beginning of the dry bean planting (late January), timely rains and increased planted area intentions lifted the expectations on the 2023 dry bean crop but as the campaign progressed dry conditions and high temperatures complicated the crop condition, reducing yields and overall production.
 - Great disparity depending on the planting date, amount of rain received, preceding crop, and variety.
 - Lots planted late, endured better this year.
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Dry Bean Production: Argentina



- Lots planted late, endured better this year.

Dry Bean Production: Argentina

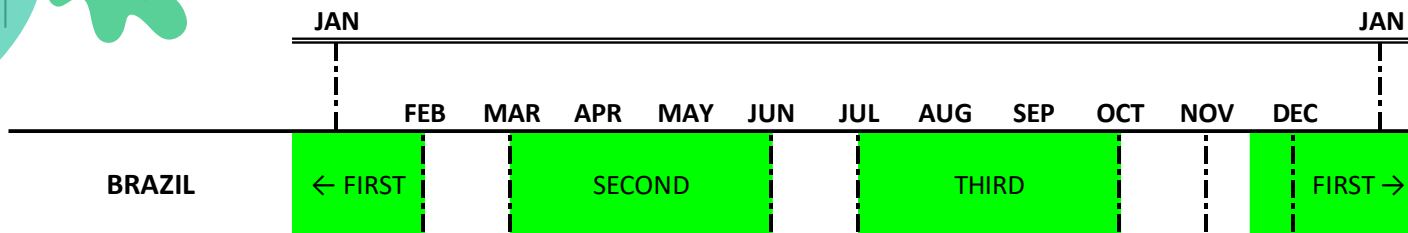


Dry Bean Production: Argentina

Bean Class	Planted Area (Hectare)					Yield (MT/Ha)				
	2021	2022	2023*	2022/23 % change	4-year average	2021	2022	2023**	2022/23 % change	4-year average
Black	160,000	185,000	185,000	0%	159,750	1.20	0.90	0.80	-11.1%	1.14
Alubia	183,750	170,000	142,000	-16%	174,688	1.20	1.00	1.00	0.0%	1.15
Cranberry	28,000	37,000	40,000	8%	27,125	1.15	1.00	1.10	10.0%	1.14
DRK	35,000	45,000	45,000	0%	30,750	1.25	1.00	1.00	0.0%	1.14
LRK	11,000	15,000	17,000	13%	10,750	1.20	1.00	1.10	10.0%	1.15
Mung	55,000	60,000	70,000	17%	53,750	1.05	1.05	1.00	-4.8%	1.05
Total	472,750	512,000	499,000	-3%	456,813	1.18	0.99	1.00	0.84%	1.14

Bean Class	Gross Production (MT)					Exportable Supply (MT)				
	2021	2022	2023**	2022/23 % change	4-year average	2021	2022	2023**	2022/23 % change	4-year average
Black	192,000	166,500	148,000	-11%	180,030	172,800	149,850	133,200	-11%	162,505
Alubia	220,500	170,000	142,000	-16%	200,750	191,835	153,000	127,800	-16%	176,478
Cranberry	32,200	37,000	44,000	19%	30,538	28,014	33,300	39,600	19%	27,094
DRK	43,750	45,000	45,000	0%	34,563	38,063	40,500	40,500	0%	30,465
LRK	13,200	15,000	18,700	25%	13,975	11,220	13,500	16,830	25%	12,157
Mung	57,750	63,000	70,000	11%	60,188	50,243	56,700	63,000	11%	49,261
Total	559,400	496,500	467,700	-6%	520,043	492,174	446,850	420,930	-6%	457,958

Dry Bean Production: Brazil



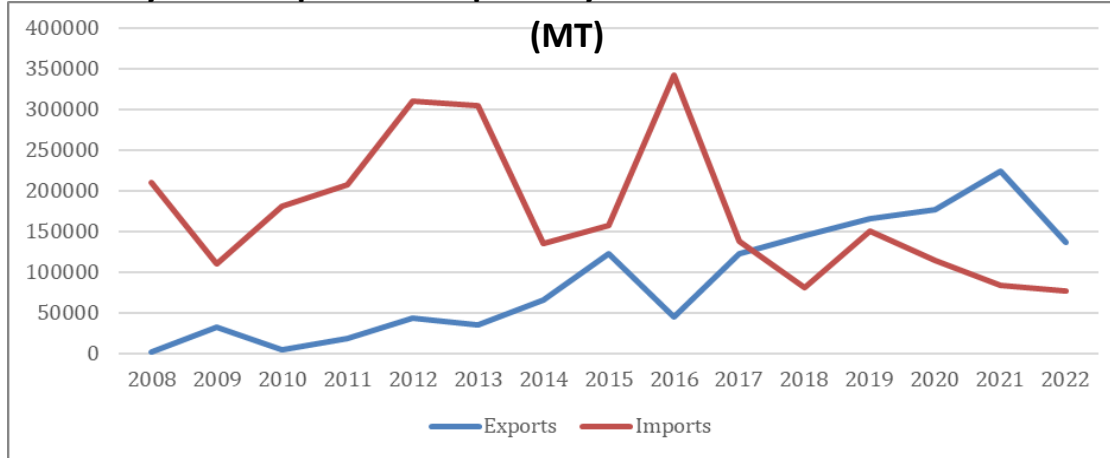
Brazil 2022/23 Total Bean Crop, CONAB June 2023 Estimates

Crop	Ha. 2021/22	Ha. 2022/23 projected	% Change	Production 2021/22 (MT)	Production 2022/23 (MT) projected	% Change
First	909,300	859,600	-5%	941,800	956,100	1.5%
Second	1,419,100	1,348,200	-5%	1,341,200	1,379,400	2.8%
Third	530,600	510,100	-4%	707,300	733,800	3.7%
Total	2,859,000	2,717,900	-4.94%	2,990,300	3,069,300	2.6%

- Black beans up 2% against last year, totaling 587,600 MT
- Colored beans up 5,2% against last year, totaling 1.875 MMT
- Brown-eyed beans down 4,1% totaling 606,500 MT

Dry Bean Production: Brazil

Brazil Dry Bean Imports vs. Exports by Calendar Year Over Past 15 Years

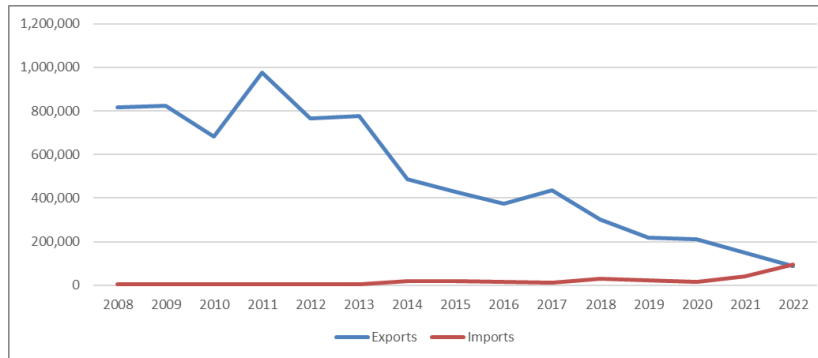
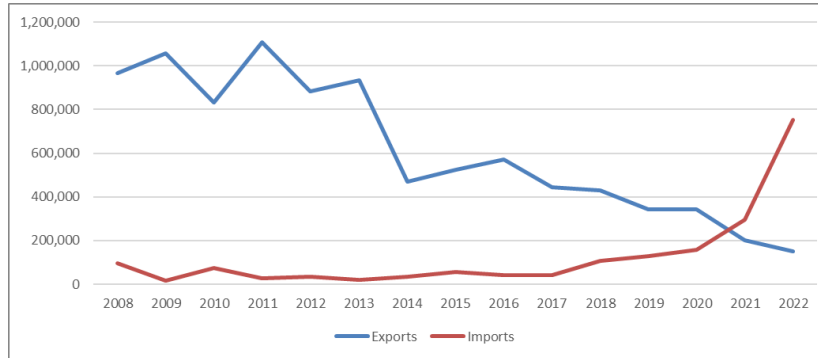


Source: Trade Data Monitor and CONAB.

- Brazil intends to increase its importance as a dry bean exporter besides their traditional markets, Brown-eyed beans and mung beans. Light red speckled beans, cranberry beans, DRKB, and black beans.
- If commodities prices ease, dry bean acreage is likely to increase.

China Exports vs Imports

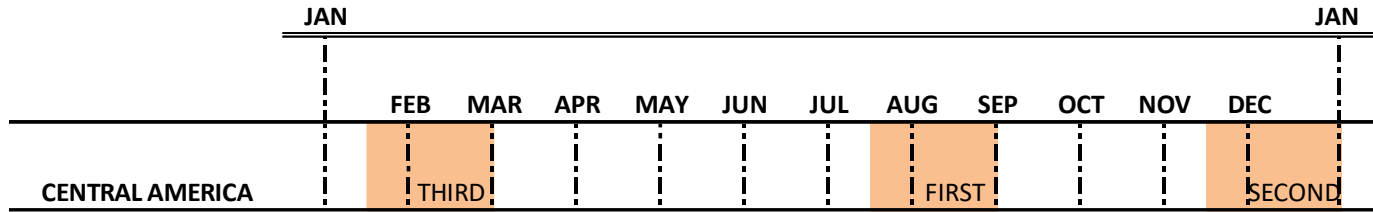
China Dry Bean Imports vs. Exports by Calendar Year Over Past 15 Years (MT)



Source: Trade Data Monitor



Dry Bean Production: Central America



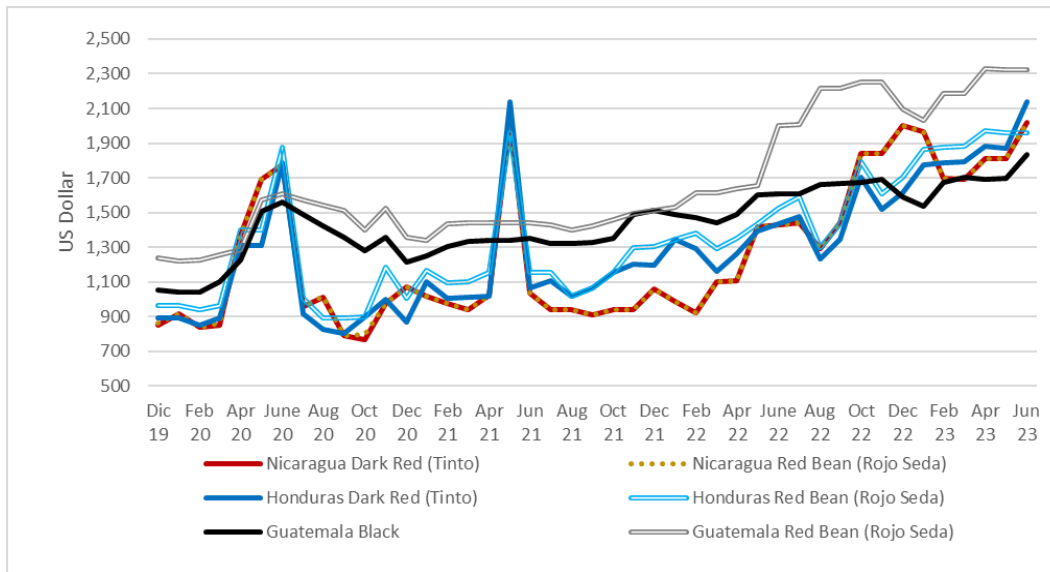
- Increasingly difficult to get accurate production data
- Generally, first crop was planted late and very affected by drought all over the region, except the very limited irrigated fields.
- Expectations are put on the third crop, produced on the Atlantic coast.

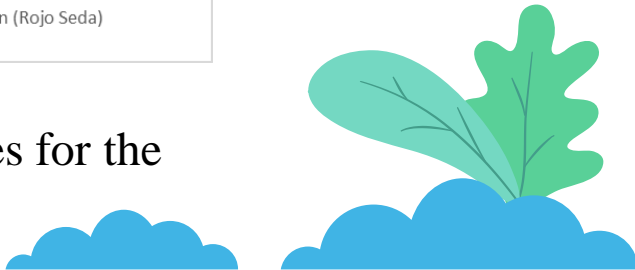




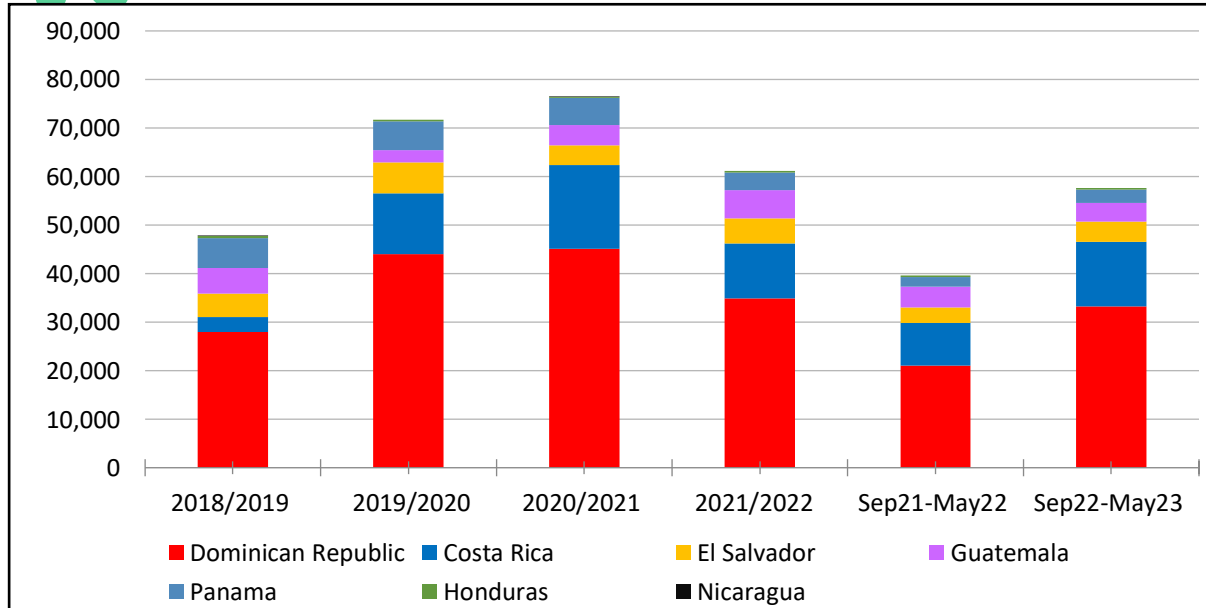
Dry Bean Production: Central America

- As a result



- Demand for small red beans and other substitutes for the local varieties increased
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Exports to CAFTA-DR Region

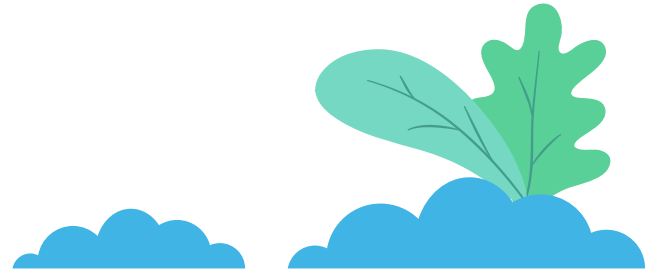


- 45%/59% increase in exports (MT/USD) against last year.



Dry Bean Production: Climate Forecasts

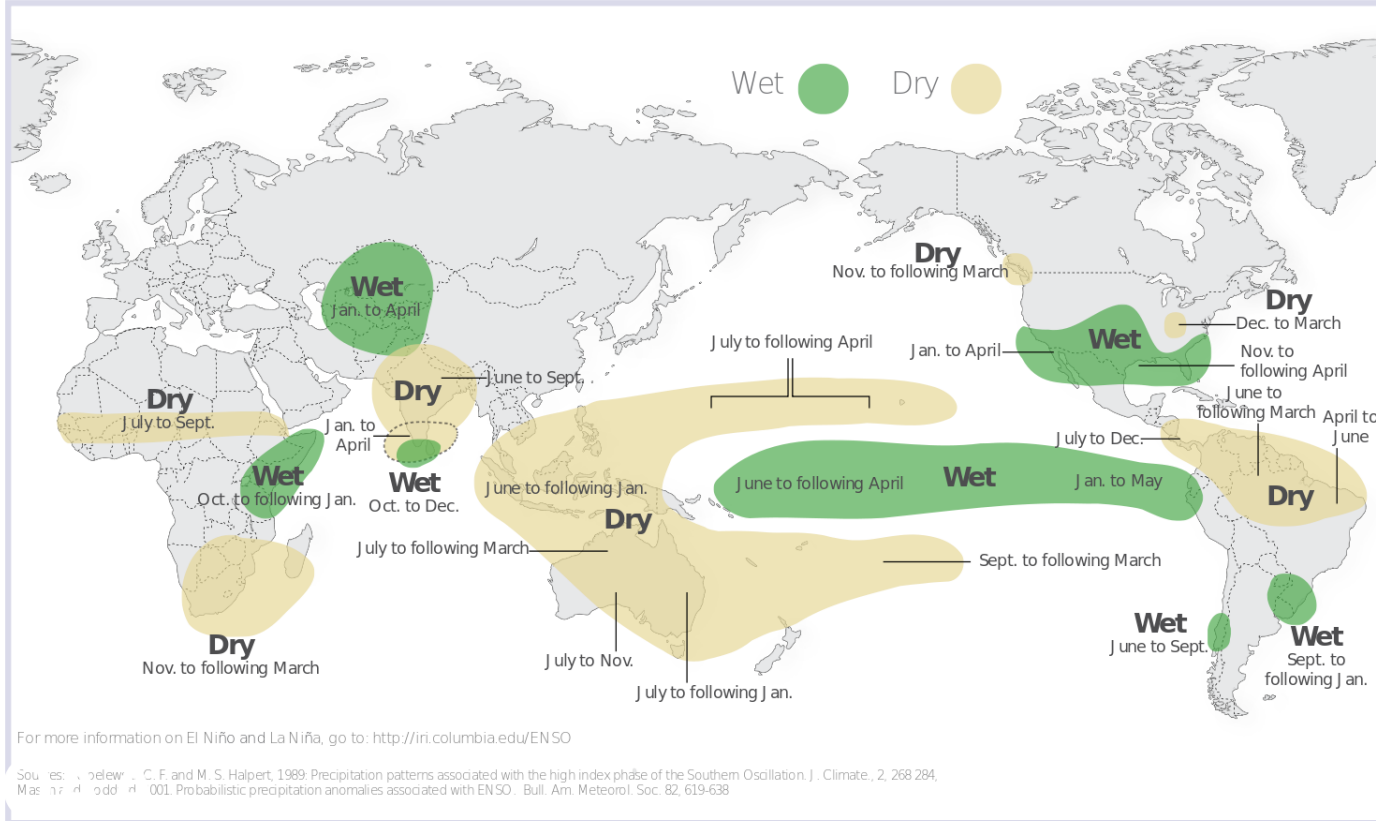
- There is a greater than 90% chance that El Niño will continue through the Northern Hemisphere winter. Forecasters favor continued growth of El Niño through the fall, peaking this winter with moderate-to-strong intensity. *National Weather Service.*
- The ENSO phenomenon is not the only climatic modulator, but in general terms, what does this mean?



Dry Beer Production: Climate Forecasts

El Niño and Rainfall

El Niño conditions in the tropical Pacific are known to shift rainfall patterns in many different parts of the world. Although they vary somewhat from one El Niño to the next, the strongest shifts remain fairly consistent in the regions and seasons shown on the map below.



For more information on El Niño and La Niña, go to: <http://iri.columbia.edu/ENSO>

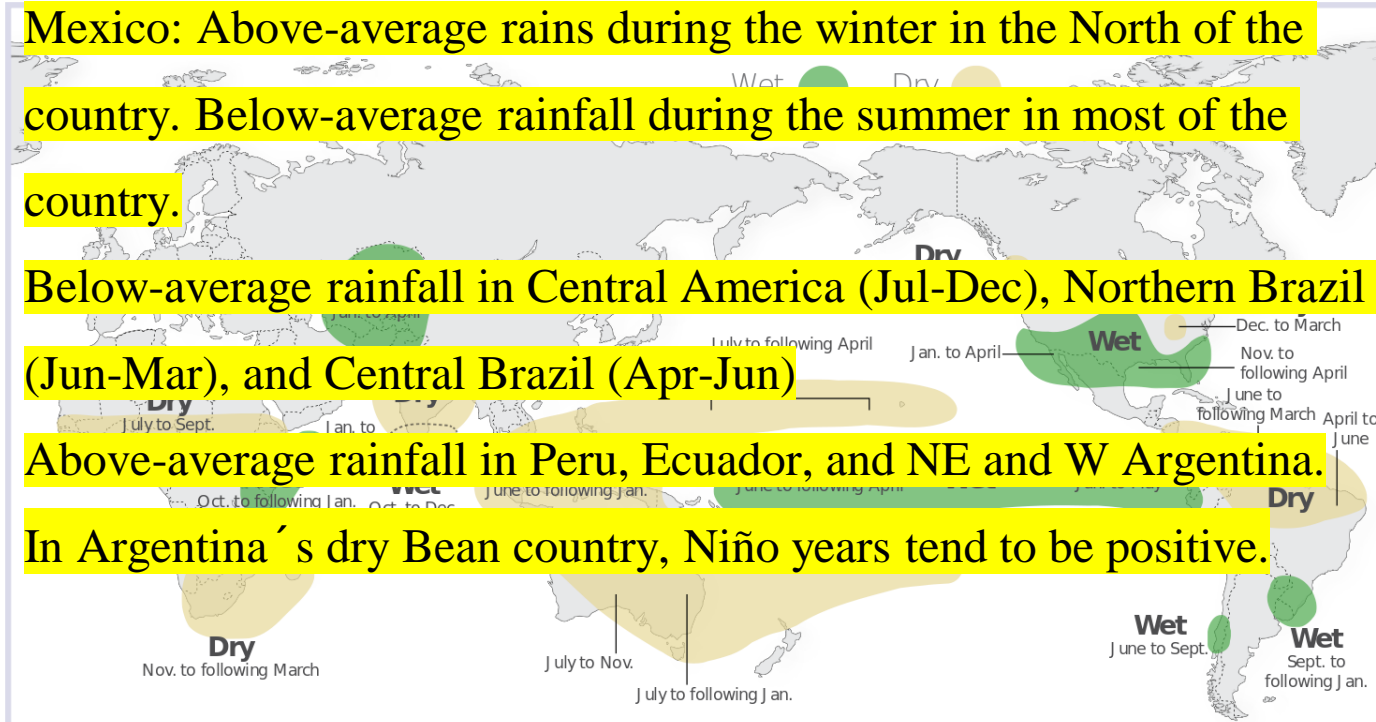
Sources: Webster, C. F. and M. S. Halpert, 1989: Precipitation patterns associated with the high index phase of the Southern Oscillation. *J. Climate*, 2, 268-284.
Marshall, G. D. 2001: Probabilistic precipitation anomalies associated with ENSO. *Bull. Am. Meteorol. Soc.* 82, 619-638.

Dry Bean Production: Climate Forecasts

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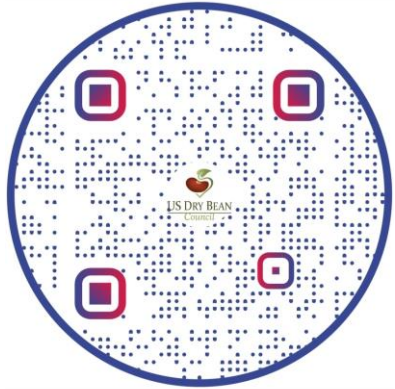
- Mexico: Above-average rains during the winter in the North of the country. Below-average rainfall during the summer in most of the country.
- Below-average rainfall in Central America (Jul-Dec), Northern Brazil (Jun-Mar), and Central Brazil (Apr-Jun)
- Above-average rainfall in Peru, Ecuador, and NE and W Argentina.
- In Argentina's dry Bean country, Niño years tend to be positive.



For more information on El Niño and La Niña, go to: <http://iri.columbia.edu/ENSO>

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THANK YOU!



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