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2025 USDBC Mexico Crop & Market Update

***Raul Caballero CEO Mercalimentos
USDBC Reps Mexico***

***US Dry Bean Convention
Denver, Co July 2025***

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Weather Outlook in Mexico



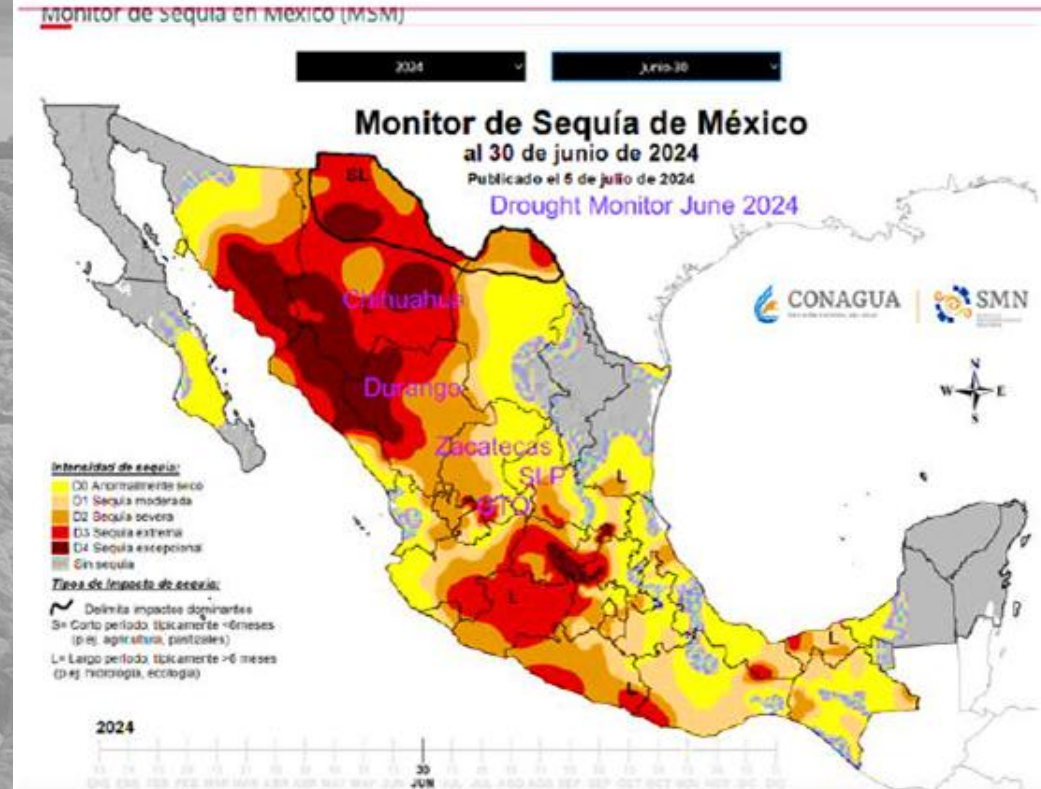
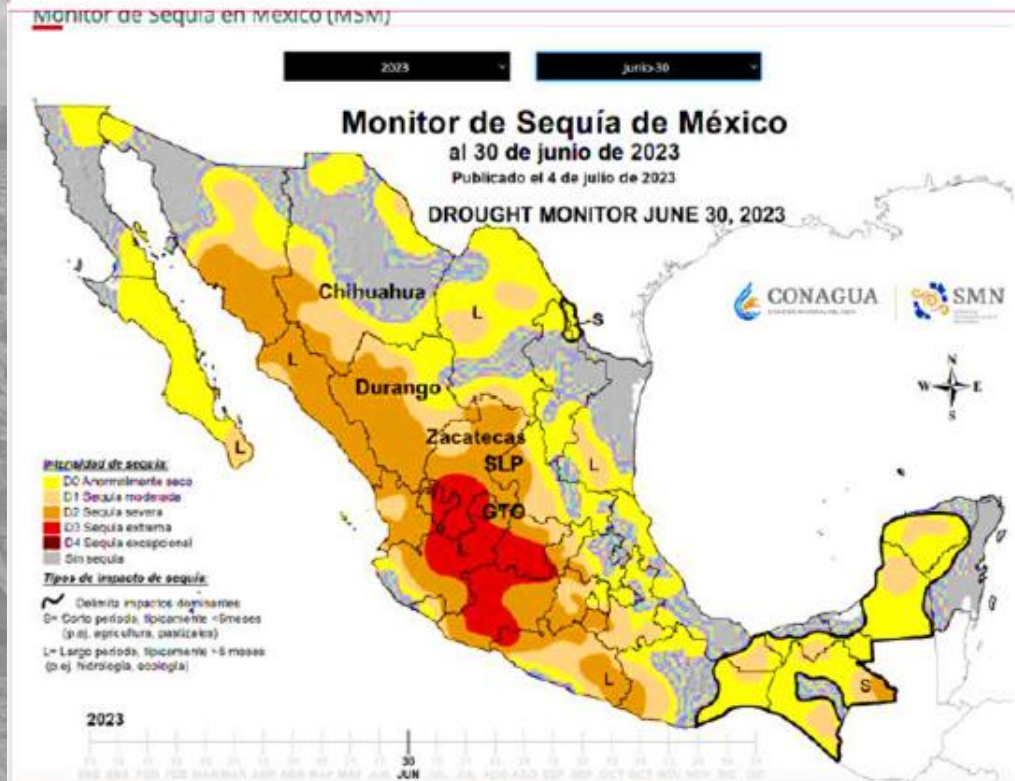
- **ENSO-Neutral Conditions Brought Above-Average Rainfall**
 - June 2025 saw a 51% increase in national rainfall vs. 1991–2020 average, driven by neutral ENSO dynamics.
- **Central-Northern States Experienced Significant Rain Gains**
 - States like Zacatecas, Durango, and Guanajuato reported heavy to very heavy rainfall, surpassing historical averages.
- **Shift in Rainfall Distribution Compared to 2024**
 - While 2024 favored the south/southeast, 2025 rainfall shifted northward, alleviating persistent drought (Zacatecas, Durango, Chihuahua, Tamaulipas, Sonora)
- **Marked Reduction in National Drought Levels**
 - Drought-affected land decreased from 73.8% in 2024 to 37.5% in June 2025.
- **Boost in Hydrological Reserves**
 - The rainfall surplus contributed to aquifer and watershed recharge in key agricultural regions.

ENSO-Neutral Neither El Niño nor La Niña is present. Sea surface temperatures are near average. Local climate is influenced more by other systems like the **North American Monsoon** or tropical storms.

Weather Outlook June 30th 2023 - 2024

DROUGHT MONITOR JUNE 30, 2023

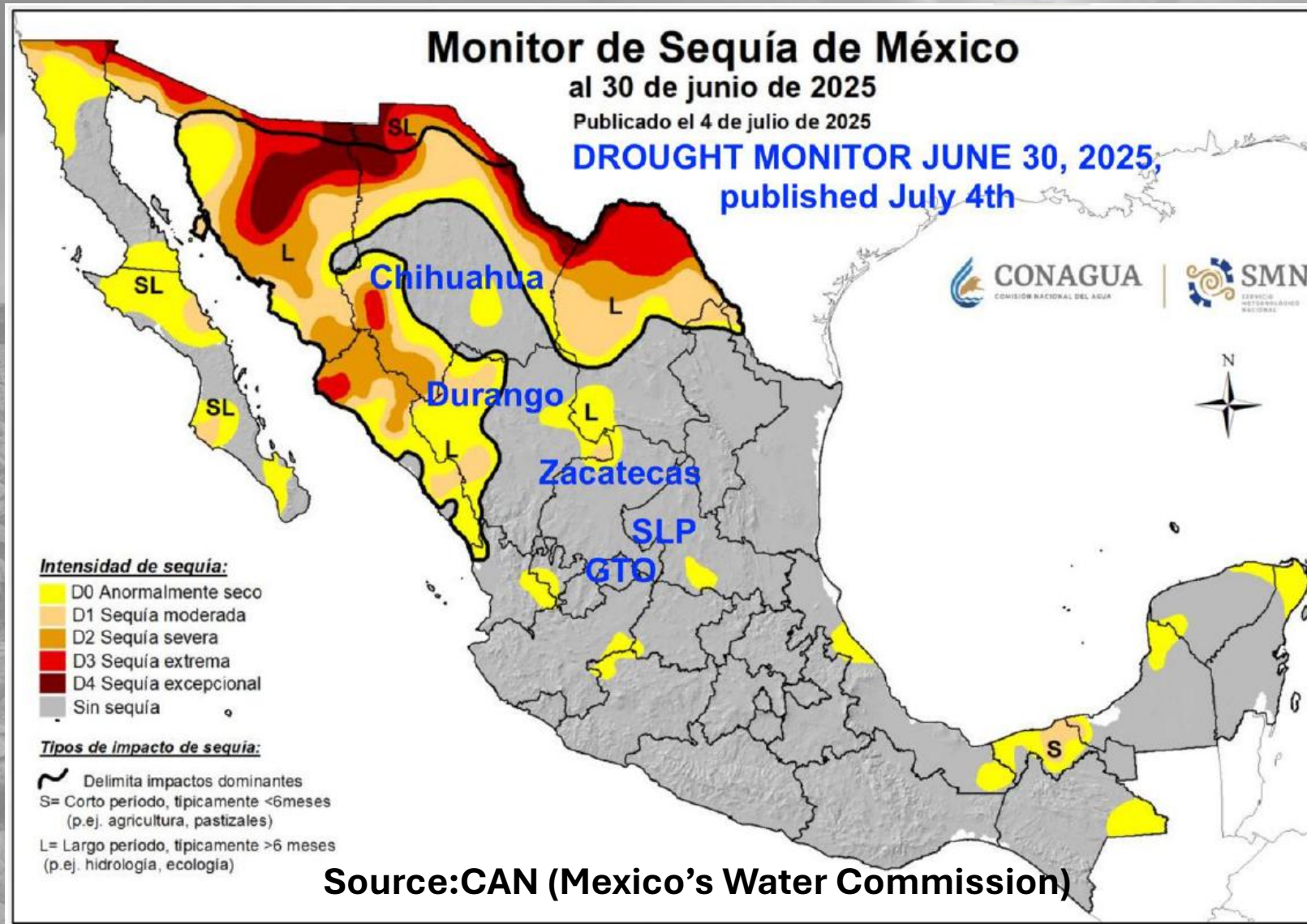
DROUGHT MONITOR JUNE 30, 2024



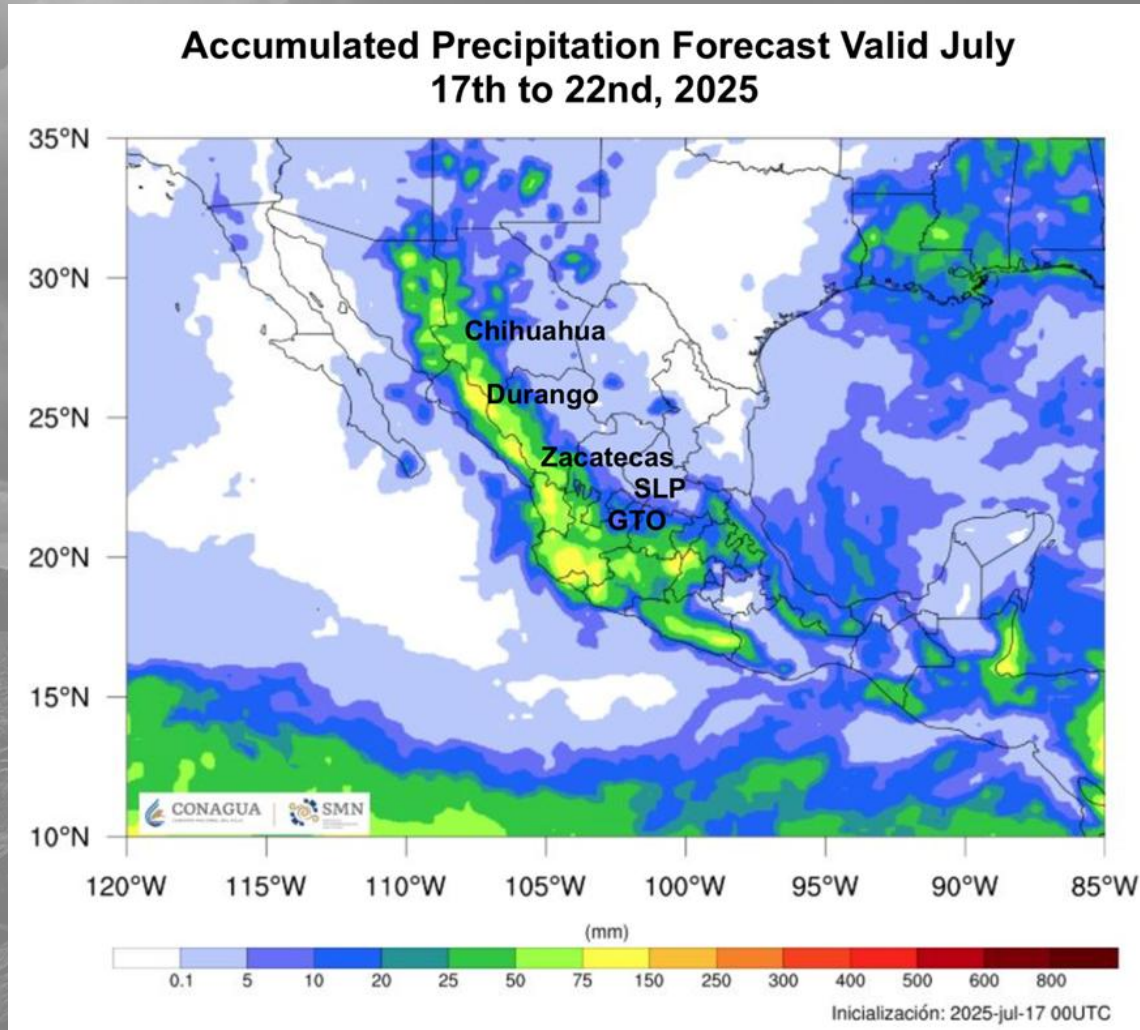
Weather Outlook in 2025



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Extreme Drought Alleviation



ENSO Neutral May-Aug 25
Nationwide Rainfall
S. Dalila - Flossie Jun-25
SW & NW Mexico (Durango Chihuahua)
Tropical S. Barry Late June 25
Central and Northern States
H. Erick Remnants Mide June 25
Central South
Hurricane Season November 25
for both Gulf of Mexico and Pacific
Until November 2025

Rain forecast Jul-Aug-Sep 25

- **July 2025 forecast: 5.03 in of rain (+1.5% vs. average, -16.2% vs. July 2024)**
- **Soil moisture improved, boosting bean planting conditions**
- **August 2025 outlook: 5.07 in (-2.7% vs. average, +9.3% vs. Aug 2024)**
- **Higher rainfall expected in top 5 producing states vs. 2024**
- **September 2025 forecast: 4.9 in (-11.3% vs. average, -14% vs. Sep 2024)**

Source: CNA (Mexico's Water Commission)



2025 Spring-Summer Dry Bean Planting Intentions

- Mexico expects to plant **1.3 million hectares** of dry beans, producing approximately **857,000 MT**.
- This represents an optimistic recovery due to recent rainfall, reversing severe drought conditions.

Zacatecas: 630,714 ha → 331,701 MT (48%)

Durango: 219,852 ha → 130,961 MT (17%)

San Luis Potosí: 123,256 ha → 67,658 MT (9%)

Chihuahua: 75,520 ha → 73,773 MT (5%)

Guanajuato: 46,230 ha → 37,373 MT (3.5%)

Seeding – Planting - Conditions



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- **Certified Seed was provided to Growers**
- **Key states with increased planting:**
 - **Chihuahua and San Luis Potosí**
 - **Expected yield growth: Chihuahua, Durango, San Luis Potosí**
- **Bean planting started end of June, but progress slow due to rain / too wet in some cases**
- **Weed growth in early-planted fields may require replanting**
- **National planting progress: estimated at 5–7%**

Mexico's Self Sufficiency ?



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- **New National Food Strategy:** Aims to increase domestic production of staples (corn, beans, rice) and reduce import dependency, targeting 80% self-sufficiency by 2030.
- **Government Intervention:** Revives 1980s-style policies including price guarantees, state-run seed production (via PROSEBIEN), and input subsidies for small farmers.
- **Agro-industrial Expansion:** Plans to build 9 public processing plants and expand food distribution through DICONSA and LICONSA stores.
- **Trade & Investment Concerns:** Critics warn of inefficiency, high costs, and potential USMCA violations, especially over seed nationalism and biotech restrictions.
- **Smallholders vs. Agribusiness:** Policy strongly favors small-scale rural farmers, sidelining large commercial producers

Current Market Constraints

- **Prices are down in all crops worldwide (beans)**
- **USA Tariffs are creating an uncertainty environment**
- **for business flow / sales**
- **Large Warehoused Inventories, Low Sales**
- **Increased Cargo theft at Rail**
- **Mexico's New Crop, Optimistic Size**
- **Imports from Argentina ? (Bilateral Agreement)**
- **Competitor low prices favor – Apecic use**
- **Competitors Pricing down to:**
 - Brazilian black beans: ~US\$730/MT**
 - Argentine black beans: ~US\$800/MT**

Competitive Landscape for US Beans



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- **PACIC (2022):** Launched to combat post-COVID inflation; fixed prices of 138 products.
- **APECIC:** Evolved PACIC by eliminating duties *and* import paperwork for basic grains.
- **Tariff-Free Access:** 21 staple foods (including beans) can be imported year-round from any country.
- **New Suppliers:** Argentina, China, Brazil, and Bolivia exported beans to Mexico via APECIC.
- **Argentina Quota:** 50,000 MT black bean quota renewed for 2025 (Jul–Nov) under ALADI agreement

Current Mexico Tariff

Category	Tariff Rate	Applies to...
USMCA-origin goods	0 %	All qualifying goods under USMCA
Non-USMCA-origin goods	25 %	Most other products (industrial, consumer, etc.)
Steel	25 %	All steel entries from Mexico
Aluminum	10 %	All aluminum entries
Automobiles & parts	25 %	Non-USMCA compliant vehicles & auto parts
Fresh tomatoes	17 %	Most fresh Mexican tomatoes
Fentanyl-related goods	25→35 %	Might increase as of August 2025
Possible across-the-board	30 %	Entire Mexican imports if implemented August 1



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U.S. Dry Bean Market Share / 2019-2025



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CY SEPTEMBER - AUGUST EVERY YEAR		
YEAR - ORIGIN	MARKET SHARE	MT
2019		
USA	86%	102,702
CAN	11%	13,367
ARG	3%	4,094
TOTAL	100%	120,163
2020		
USA	93%	108,158
CAN	7%	8,551
TOTAL	100%	116,709
2021		
USA	90%	205,551
CAN	9%	20,781
ARG	1%	1,410
TOTAL	100%	227,742
2022		
USA	92%	61,622
CAN	8%	5,466
ARG	0	120
TOTAL	100%	67,208

CY SEPTEMBER - AUGUST EVERY YEAR		
YEAR - ORIGIN	MARKET SHARE	MT
2023		
USA	84%	147,213
CAN	9%	16,024
ARG	7%	11,751
BOLIVIA	0%	192
TOTAL	100%	175,180
2024		
USA	73%	331,777
CAN	14%	64,845
ARG	7%	32,168
BRAZIL	5%	24,010
CHINA	1.0%	3,533
BOLIVIA	0%	443
TOTAL	100%	456,776
CY 2025 (Set24-until May-25)		
USA	76%	164,830
CAN	12%	25,702
ARG	9%	19,895
BRAZIL	3%	6,078
CHINA	0%	67
BOLIVIA	0%	72
TOTAL	100%	216,644

Quota and APECIC
APECIC Implemented

Quota and APECIC
APECIC Implemented
APECIC Implemented
APECIC Implemented

Quota and APECIC
APECIC Implemented
APECIC Implemented
APECIC Implemented

2019-2022 Pre Apecic / Source: Mexico's Customs / Mercalimentos Analysis

Mexico City FAS-USDA Minister Counselor Meeting



•A Special Delegation Team met with Morgan Perkins, U.S. Embassy Minister Counselor of FAS-USDA Offices to discuss trade , tariff constraints and current status of U.S. dry bean exports to Mexico.

U.S.–Mexico Ag Trade Roundtable



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Early in the year when Tariffs were announced, Mexican Secretary of Agriculture Julio Verdegue requested a meeting with all cooperators to address free trade and friendship. The Mexican government was utilizing all resources to avoid tariffs

Railroad Border Issues - Meeting



Dylan Karley and Raul Caballero attended the US-Mexico Trade Railroad Shipping Bilateral Meeting between USA – Mexico Governments, Local Industry Chamber Leaders, USA cooperators, and railroad lines, representing US dry bean industry to discuss current, short and medium term border status and commitments from railroad lines and governments to improve border trade via the railroad.

Railroad Border Issues - Meeting



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Main topics discussed and committed for solutions were:

- **Alleviate the Infrastructure Lag vs. Demand Growth**
Mexico is building 4 new grain terminals increasing capacity
- **Mentioning that Border Inspection Bottlenecks, 7 day rail operations vs. 5 day USDA/SADER inspections**
Calls for Binational Coordination
Stakeholders urged U.S.–Mexico regulatory alignment,
- **Tech, Routing, and Rail Company Roles**
- **6-12 months follow up meeting**

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Economic & Political Outlook



- **Mexico is experiencing democratic backsliding marked by growing authoritarianism, as power becomes increasingly concentrated in the executive branch, judicial and electoral institutions are undermined, and military and presidential influence expand at the expense of democratic checks and balances.**
- **U.S. escalates pressure on Mexico by designating cartels as terrorist organizations, imposing sanctions, freezing assets, threatening tariffs, and expanding military/intelligence tools to combat fentanyl trafficking and cartel-related crimes.**
- **Mexico responds with limited cooperation and defends its sovereignty, deploying troops, extraditing high-profile suspects, and engaging in bilateral talks—while firmly rejecting U.S. military presence on Mexican soil.**
- **Mexico faces mounting fiscal strain due to rising public debt, stagnant revenues, and underfunded state-owned firms—prompting investment cuts, credit rating concerns, and warnings of reduced budget flexibility and growing sovereign risk.**

Source: Mercalimentos Analysis

2025 Mx-Latam Conf Cancun



- **200 Trade Members**
- **USA-Mex-Latam Participants**
- **450 business meetings**
- **Trade Survey**
- **33M on the Spot**
- **186M 12 Month Sales**
- **99% Event Approval**





**USA Beans, Peas, Lentils,
Chickpeas MX-Latam
Conference 26**



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Chickpeas MX-Latam
Conference 26

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February 12 - 14, 2026

 **Location: Puerto Vallarta, Mexico**

Hotel: The Westin Resort & Spa

Paseo de la Marina Sur #205, Puerto Vallarta, Jalisco, México, 48354



USA Beans, Peas, Lentils,
Chickpeas MX-Latam
Conference 26

207
Days

12
Hours

57
Minutes

38
Seconds



TITLE

(Up to 1 main sponsor)

USD\$6,000

- Premier recognition on promotional event materials
- Personalized Badge Cord branding
- Prominent logo on event webpage
- Opportunity to play video (up to two minutes) during general session
- Three complementary registrations
- Printed Materials of your choice (up to 2 brochures) in Event's Registration Bag

LEAD

(Up to 6 sponsors)

USD\$3,500

- Prominent recognition on promotional event materials and emails
- Medium Logo on event webpage
- Three complementary registrations
- Printed Materials of your choice (up to 1 brochure) in Event's Registration bag

SUSTAINING

(Up to 8 sponsors)

USD\$1,500

- Recognition on promotional event materials and emails
- Small Logo on event webpage
- Printed Materials of your choice (up to 1 brochure) in Event's Registration bag

SUPPORTING

(Up to 10 sponsors)

USD\$1,000

EXHIBITOR

(Up to 10 sponsor)

USD\$1,000



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Thank you !!
See you in Puerto Vallarta

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