

# Global Production Overview



**Alejandro Leloir**  
Director Regional Centro, Sur America  
& Caribe en US Dry Bean Council

A portrait of Alejandro Leloir, a man with short brown hair and a goatee, wearing a white button-down shirt. The portrait is set within a circular frame that has a green and white geometric pattern. The background of the entire slide is a dense field of various colored beans (red, white, speckled).

**Vicente Mendoza**  
Agricultural Consultant Mexico

A portrait of Vicente Mendoza, a man with a beard and mustache, wearing a dark jacket. The portrait is set within a circular frame with a green and white geometric pattern. The background is a field of beans.

**Raul Caballero**  
USDBC Mexico  
Master of Ceremonies

A portrait of Raul Caballero, a man with glasses and a beard, wearing a dark jacket. The portrait is set within a circular frame with a green and white geometric pattern. The background is a field of beans.





# Global Dry Bean Production Perspective

Alejandro Leloir  
USDBC





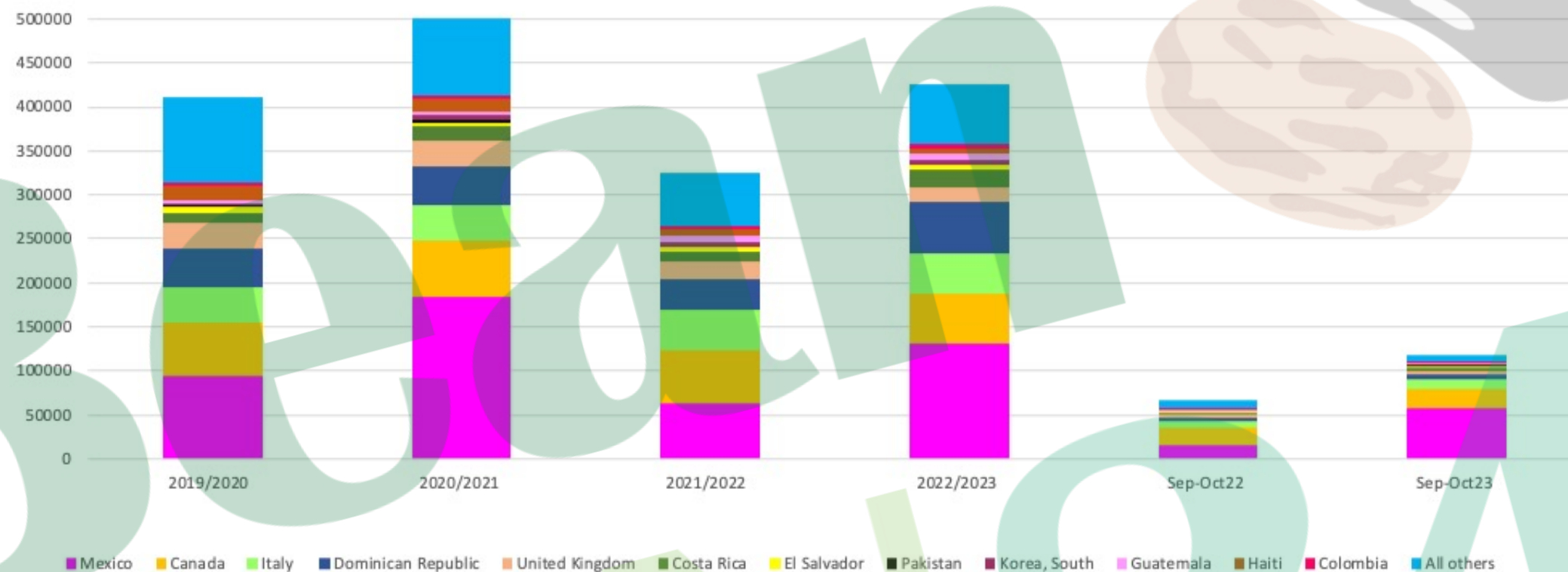
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# U.S. Dry Bean Exports by destination



Partner	2019/2020	2020/2021	2021/2022	2022/2023	2022/23 vs 2021/22	2022/23 vs past 3-year
<b>Mexico</b>	93,411	184,341	62,961	131,075	108%	15%
<b>Dominican Republic</b>	44,027	45,135	34,500	57,479	67%	39%
<b>Canada</b>	61,228	63,340	61,505	56,243	-9%	-9%
<b>Italy</b>	39,869	40,388	45,027	46,872	4%	12%
<b>Costa Rica</b>	12,487	17,258	11,355	19,204	69%	40%
<b>United Kingdom</b>	29,117	28,152	20,386	17,058	-16%	-34%
<b>Guatemala</b>	2,456	4,138	5,884	9,001	53%	116%
<b>Turkey</b>	6,335	2,943	909	7,863	765%	132%
<b>El Salvador</b>	6,418	4,014	5,126	6,000	17%	16%
<b>Netherlands</b>	3,763	3,634	4,605	5,274	15%	32%



# U.S. Dry Bean Exports by variety

2022/2023 U.S. Exports by Variety



- BLACK BEANS
- NAVY/PEA BEANS
- OTH KIDNEY BEANS
- PINTO BEANS
- DRKB
- SML RED BEANS
- LRKB
- BEANS, NESOI
- VIGNA MUNGO BNS
- LIMA BEANS, NES
- BEANS, CRANBERRY
- GRT NTHRN BEANS
- DRIED PINK BEANS
- WHITE BEANS
- B LIMA BEANS
- COWPEAS
- BAMBARA BEANS

Bean Kind	2019/2020	2020/2021	2021/2022	2022/2023	2022/23 vs 2021/22	2022/23 vs past 3-year-average
BLACK BEANS	74322.1	88299.8	49483	71540.5	45%	1%
NAVY/PEA BEANS	64448.3	53834.9	58516.8	60119.3	3%	2%
OTH KIDNEY BEANS	29473.9	55867.7	30188.6	59181.2	96%	54%
PINTO BEANS	49527.3	83262.2	20858.5	46596.5	123%	-9%
DRKB	69934.2	68884.5	46890.4	44247.5	-6%	-29%
BEAN SD, ALL KINDS	69062.5	80232.9	57926.3	84913.6	47%	23%
SML RED BEANS	9575.3	24615.4	11576.1	14933.1	29%	-2%
LRKB	11805.1	12522.2	5942.6	12356.7	108%	22%
VIGNA MUNGO BNS	1261.9	2604.4	2368.3	5771.3	144%	178%
LIMA BEANS, NES	7990.7	5368.6	5427	5549.5	2%	-11%
BEANS, CRANBERRY	4349.2	3136.9	11026	5429.2	-51%	-12%
GRT NTHRN BEANS	7837.3	7618.9	5058.5	4022.4	-20%	-41%
DRIED PINK BEANS	1633.2	2066.3	1625.7	1407.8	-13%	-21%

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# U.S. Dry Bean Production

BEAN CLASS	2019	2020	2021	2022	2023	22/23 % change
Large lima	9,072	10,251	6,577	7,303	7,893	8%
Baby lima	13,109	9,480	7,212	5,806	5,942	2%
Navy	135,261	206,430	158,306	163,477	145,515	-11%
Great Northern	46,584	79,968	52,209	25,220	40,053	59%
Small white	5,126	5,761	6,396	3,992	6,441	61%
Pinto	308,579	605,909	335,210	486,441	390,368	-20%
Light red kidney	41,277	59,058	56,790	51,256	29,665	-42%
Dark red kidney	65,499	93,894	82,146	60,509	42,093	-30%
Pink	13,063	14,334	15,195	18,144	23,179	28%
Small red	26,036	43,817	41,005	37,240	48,716	31%
Cranberry	7,167	5,897	12,247	8,800	11,022	25%
Black	229,654	297,330	206,892	270,885	303,952	12%
Blackeye	12,156	16,284	10,387	6,895	12,927	87%
Other	28,894	33,248	26,263	21,319	16,783	-21%
<b>Dry Beans Total</b>	<b>941,477</b>	<b>1,481,661</b>	<b>1,016,835</b>	<b>1,167,287</b>	<b>1,084,549</b>	<b>-7%</b>

Chickpea (small)	63,095	31,343	18,325	49,215	63,639	29%
Chickpea (large)	220,673	154,040	110,858	117,979	150,547	28%
<b>Chickpeas Total</b>	<b>283,768</b>	<b>185,383</b>	<b>129,183</b>	<b>167,194</b>	<b>214,186</b>	<b>28%</b>

Source: 2023 Crop Production Annual Summary, released January 12, 2024, by the National Agricultural Statistics Service (NASS)



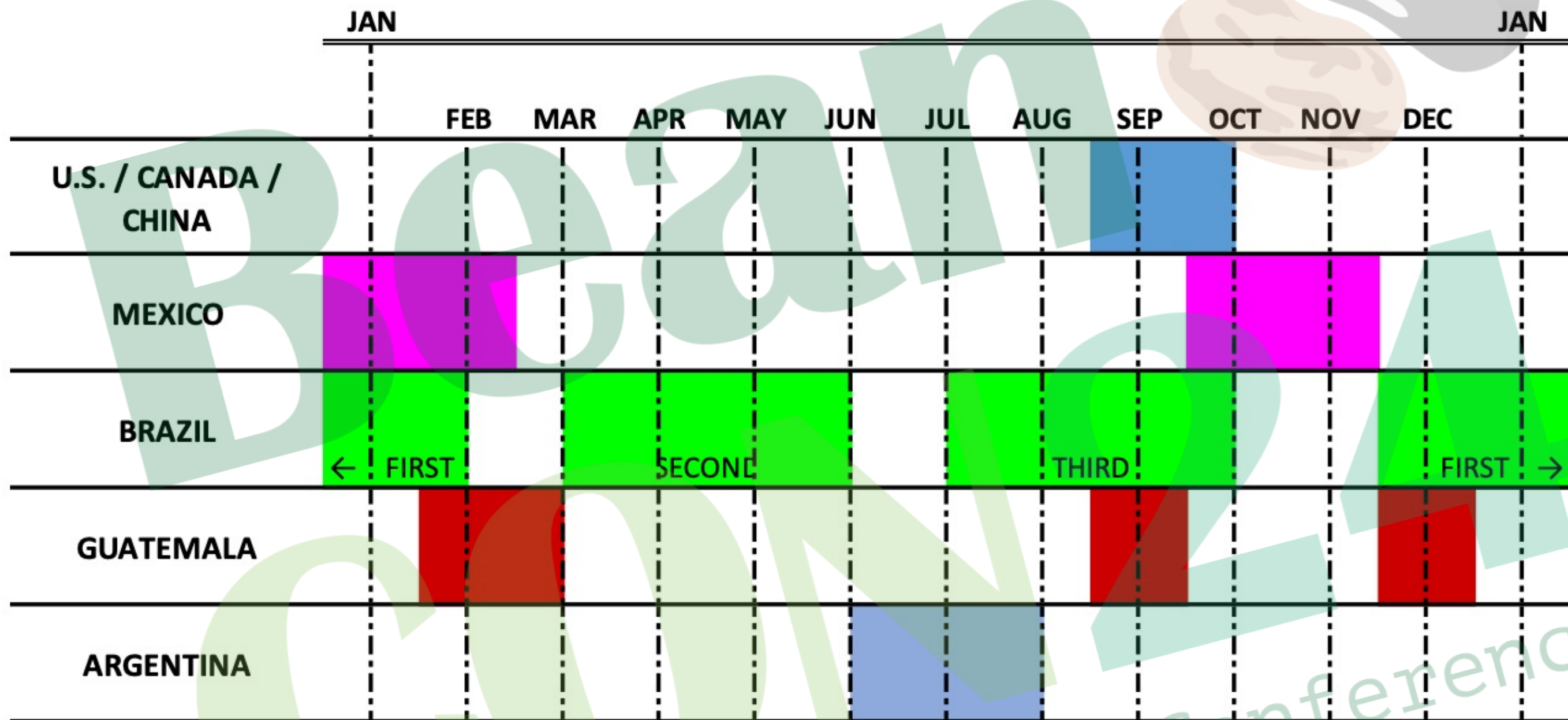
# Black Bean Production & Exports

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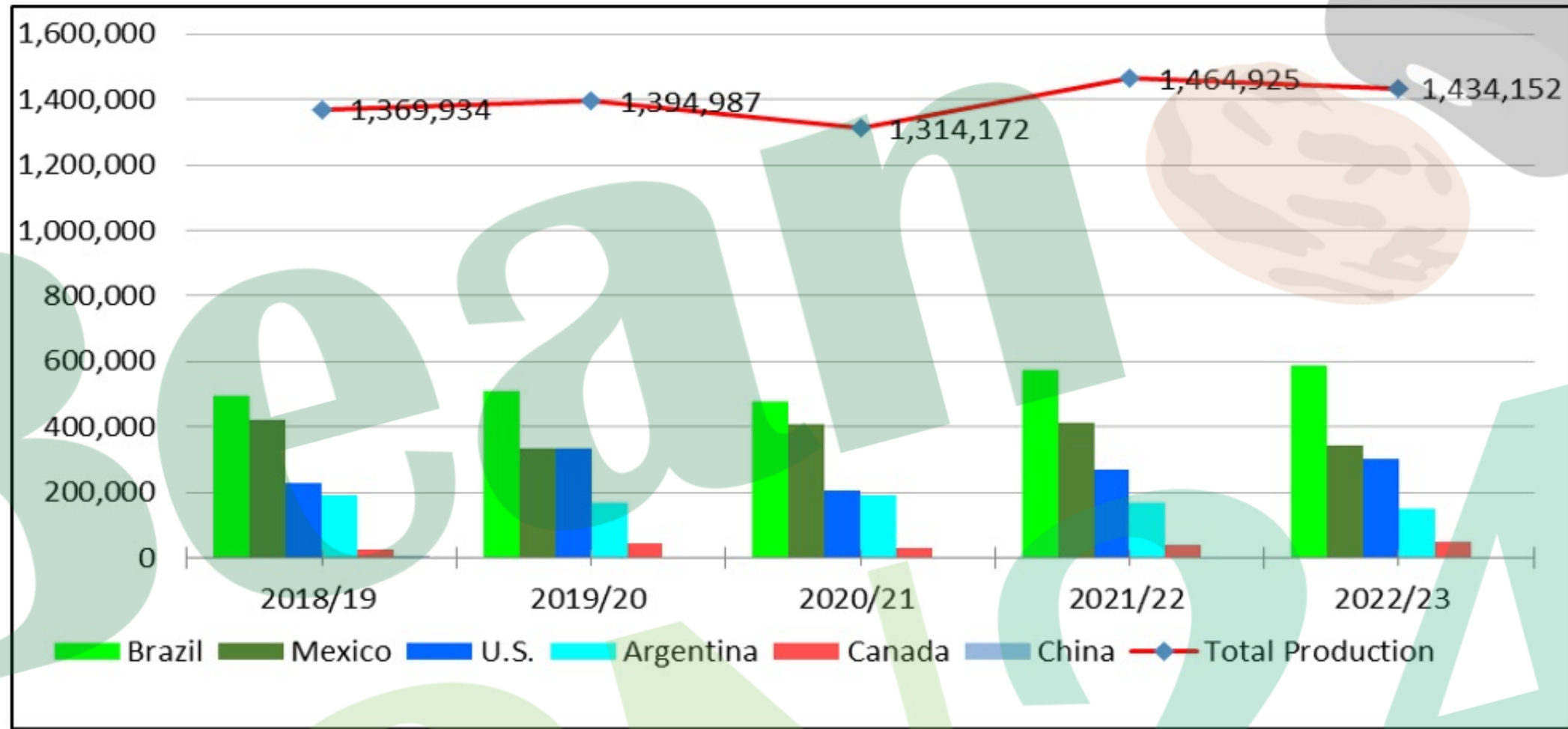
# Harvest Period in the Main Black Bean Producing Countries



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# Black Bean Production

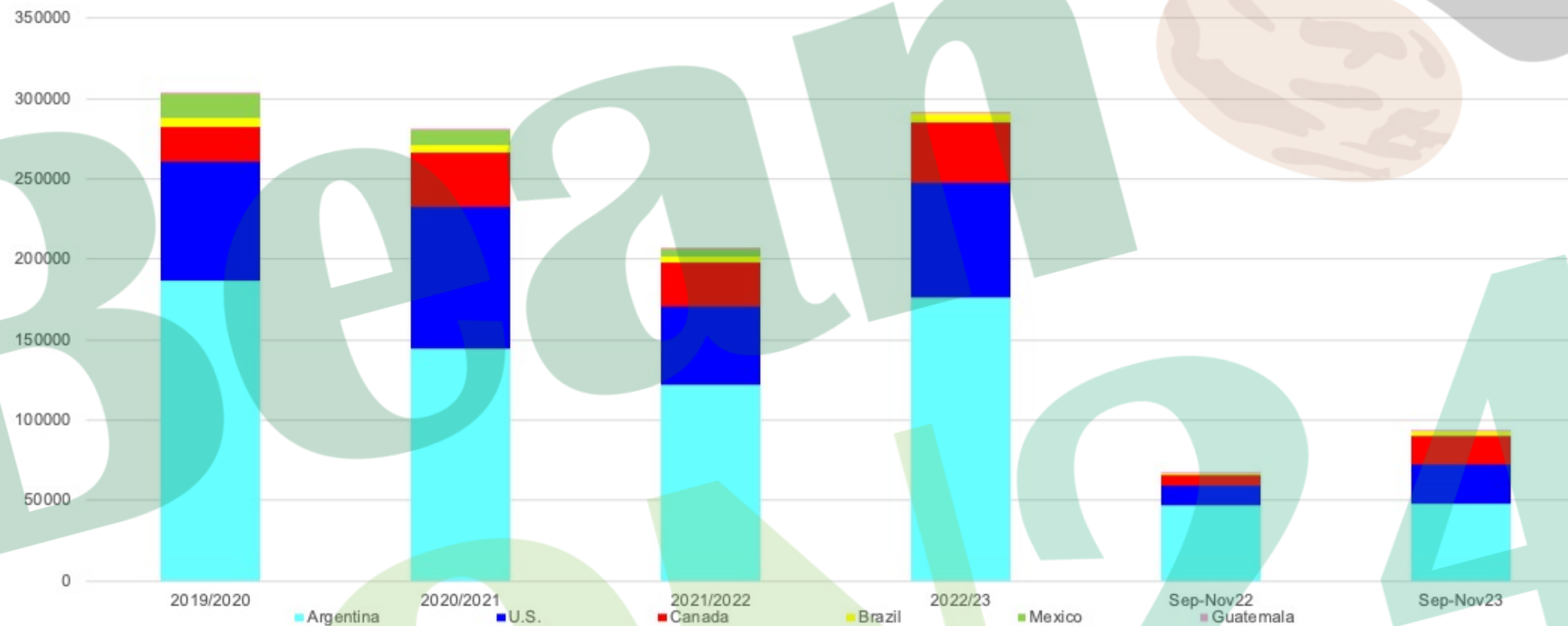


	2018/19	2019/20	2020/21	2021/22	2022/23	Average	2022/2023 vs Average
Brazil	493,400	509,500	475,700	575,800	587,600	528,400	11%
Mexico*	422,120	334,958	408,979	412,240	343,600	384,379	-11%
U.S.	229,654	333,009	206,793	270,885	303,952	268,859	13%
Argentina	191,100	170,520	192,000	166,500	148,000	173,624	-15%
Canada	26,660	42,000	30,700	39,500	51,000	37,972	34%
China	7,000	5,000	0	0	0	??	
Total	1,369,934	1,394,987	1,314,172	1,464,925	1,434,152	1,393,234	3%

\* Mexico production estimate calculated as SS2022 + FW2023



# Black Bean Exports from Major Producing Countries, September – August MY (in MT)



Country	2019/2020	2020/2021	2021/2022	2022/23	Sep-Nov22	Sep-Nov23	Average	2023 vs Average
Argentina	186,351	144,486	121,701	176,201	46,894	47,545	157,185	12%
U.S.	74,322	88,300	49,483	71,540	12,356	25,142	70,911	1%
Canada	21,390	33,801	26,536	37,575	6,509	17,091	29,826	26%
Brazil	5,767	4,591	4,440	5,600	958	3,441	5,100	10%
Mexico	14,744	9,632	4,287	0	0	0	7,166	-100%
<b>Total</b>	<b>303,922</b>	<b>281,666</b>	<b>207,382</b>	<b>291,131</b>	<b>66,730</b>	<b>93,229</b>	<b>271,025</b>	<b>7%</b>





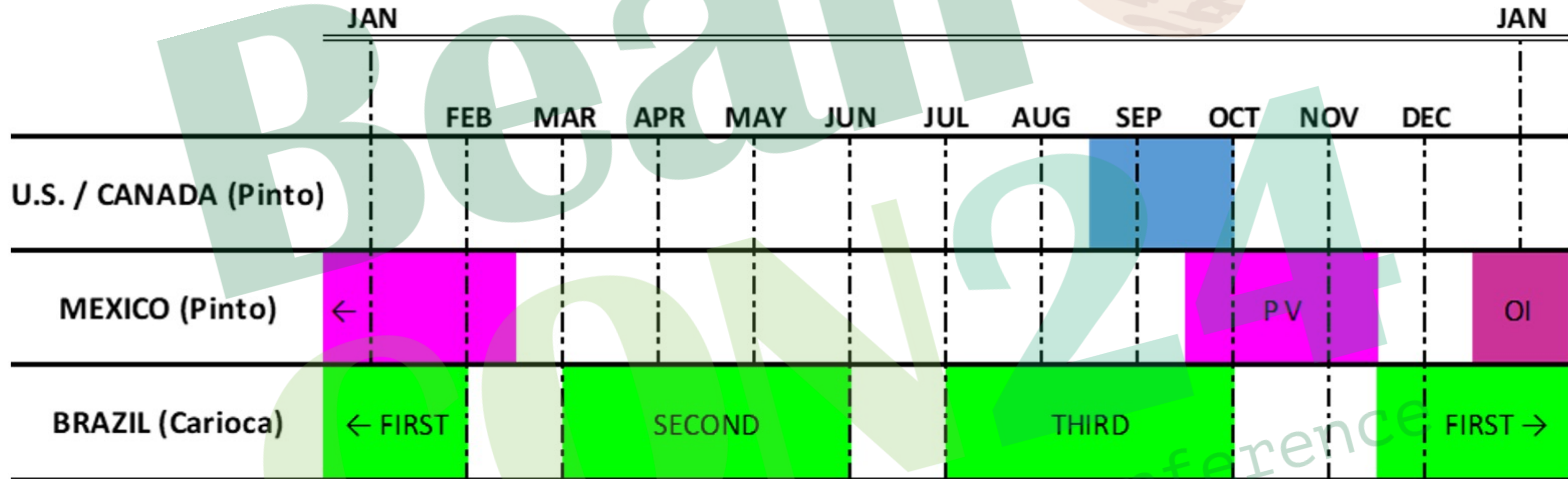
# Pinto Beans

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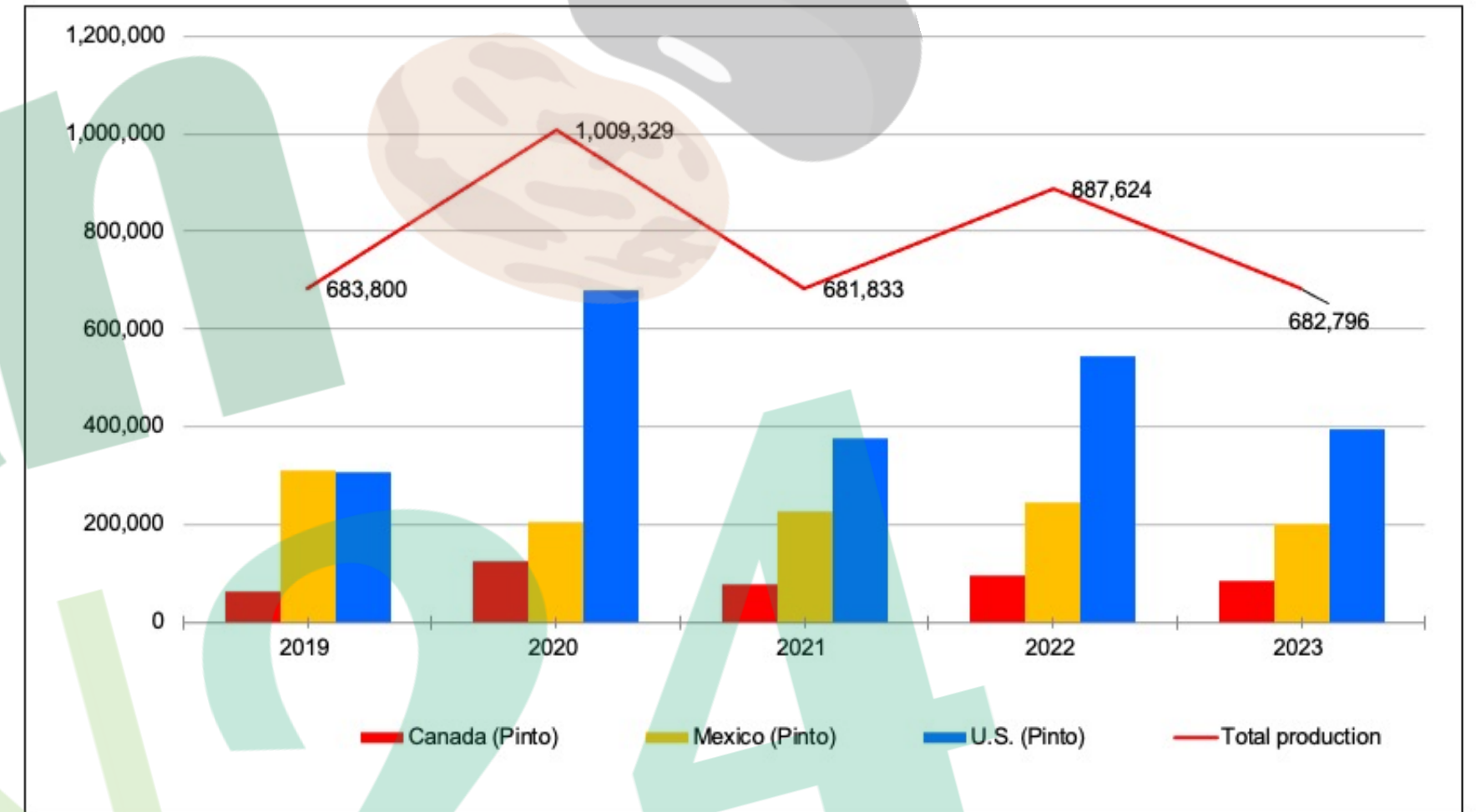
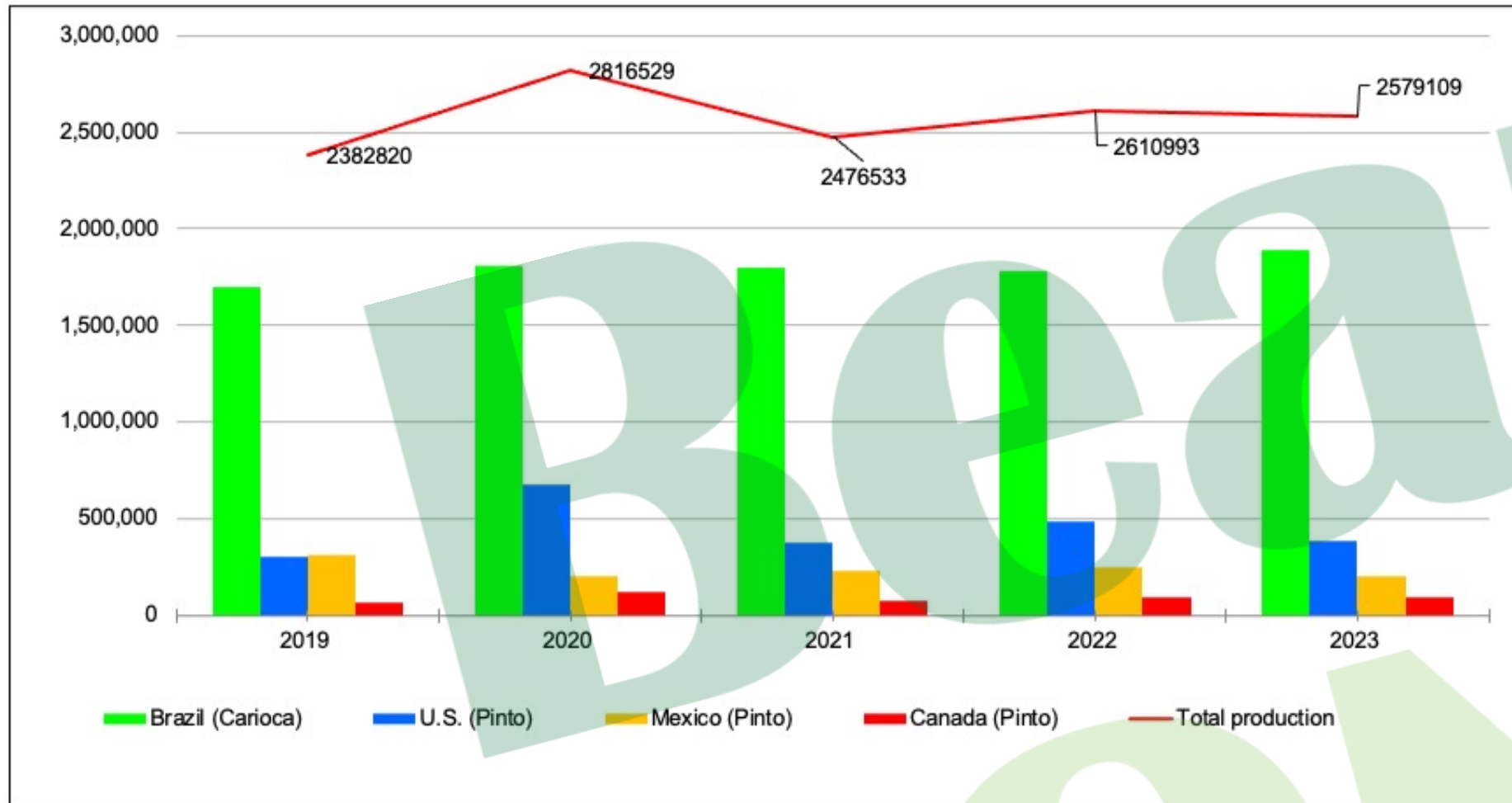
# Harvest Period in the Main Pinto Bean Producing Countries



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# Pinto Bean Production (MT)

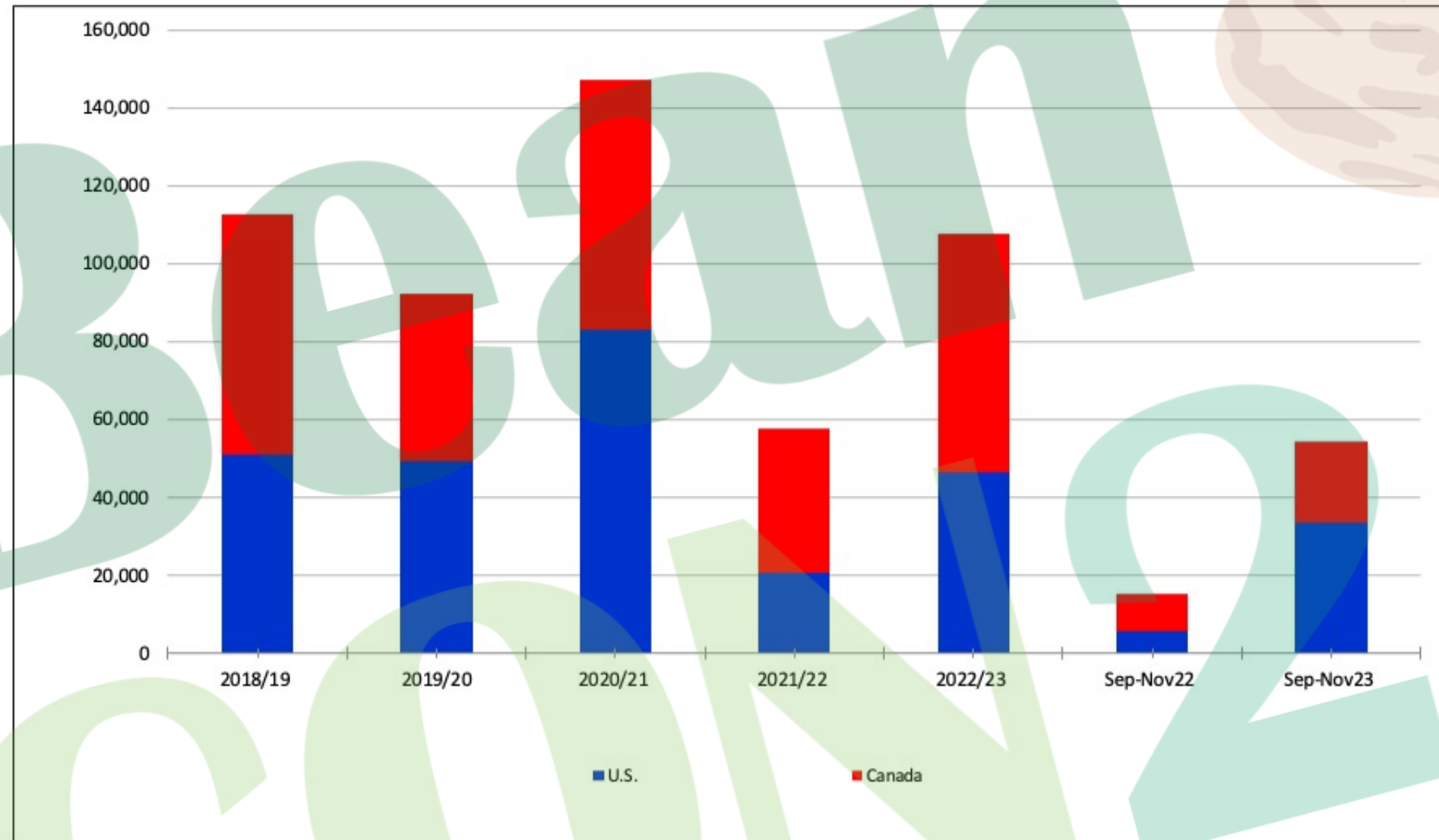


COUNTRY	2019	2020	2021	2022	2023	Average	2022/2023 vs Average
Brazil	1,699,020	1,807,200	1,794,700	1,782,300	1,893,500	1,795,344	5%
U.S.	308,579	678,618	376,597	486,432	390,362	448,118	-13%
Mexico*	311,869	204,624	227,236	246,761	202,247	238,547	-15%
Canada	63,352	126,087	78,000	95,500	93,000	91,188	2%
Total production	2,382,820	2,816,529	2,476,533	2,610,993	2,579,109	2,573,197	0%

\* Mexico production estimate calculated as SS2022 + FW2023



# Pinto Bean Exports from Major Producing Countries, September – August MY (in MT)



Partner	2019/20	2020/21	2021/22	2022/23	Sep-Nov22	Sep-Nov23	Average	2023 vs Average
U.S.	49,527	83,262	20,858	46,596	5,897	33,419	50,061	-7%
Canada	42,824	64,033	37,014	61,043	9,337	21,194	51,229	19%
Total	92,351	147,295	57,872	107,639	15,234	54,613	101,289	6%





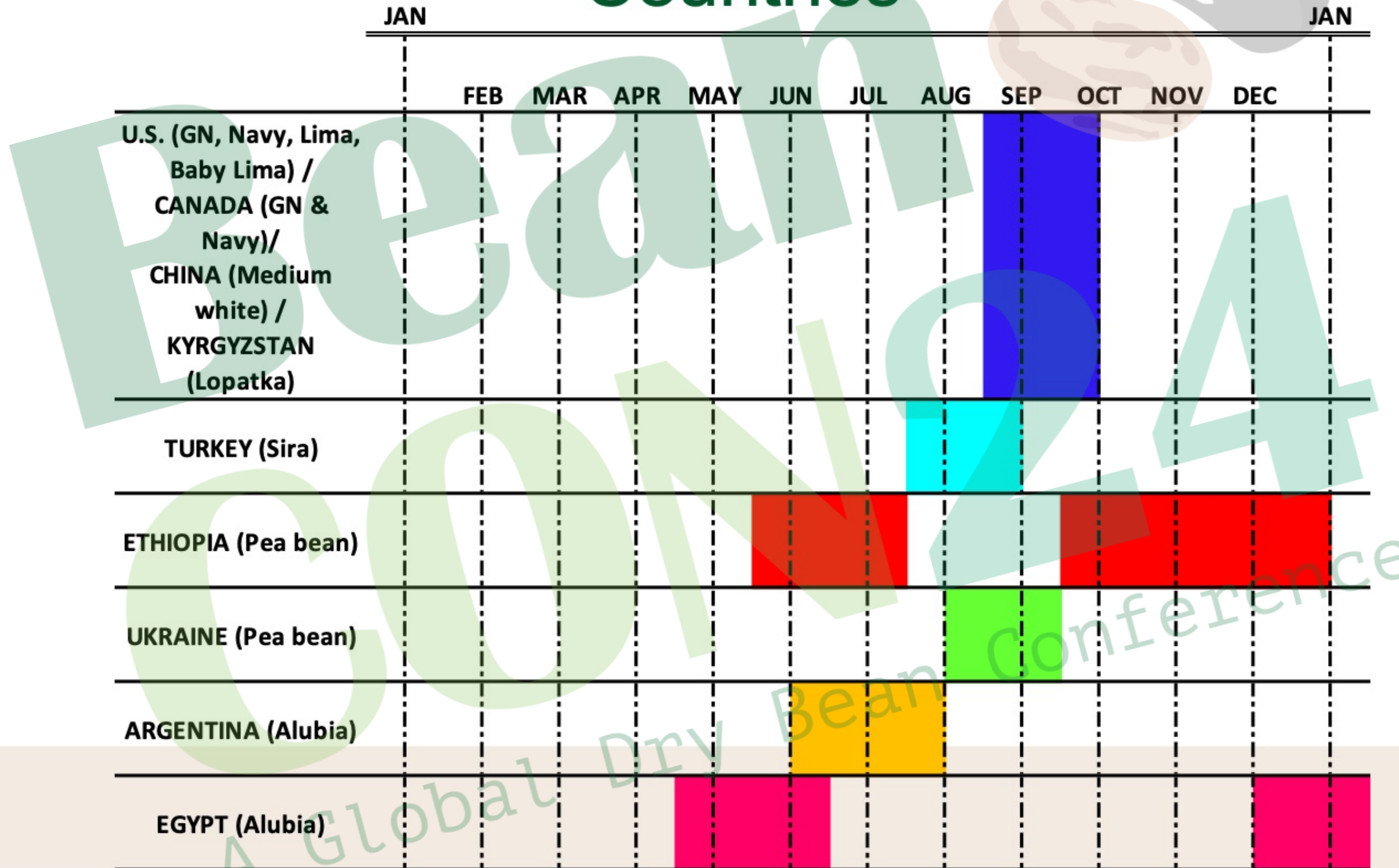
# White Beans

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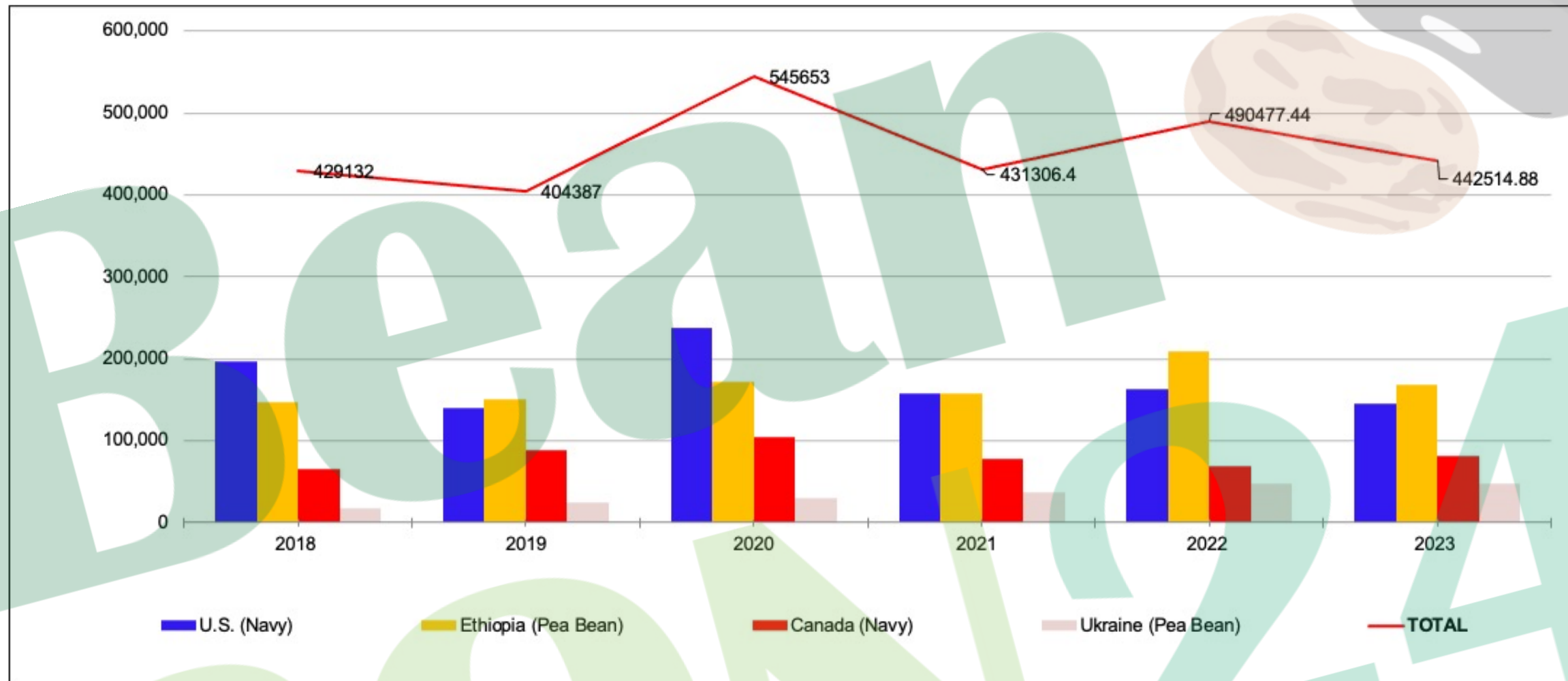


# Harvest Period in the Main White Bean Producing Countries





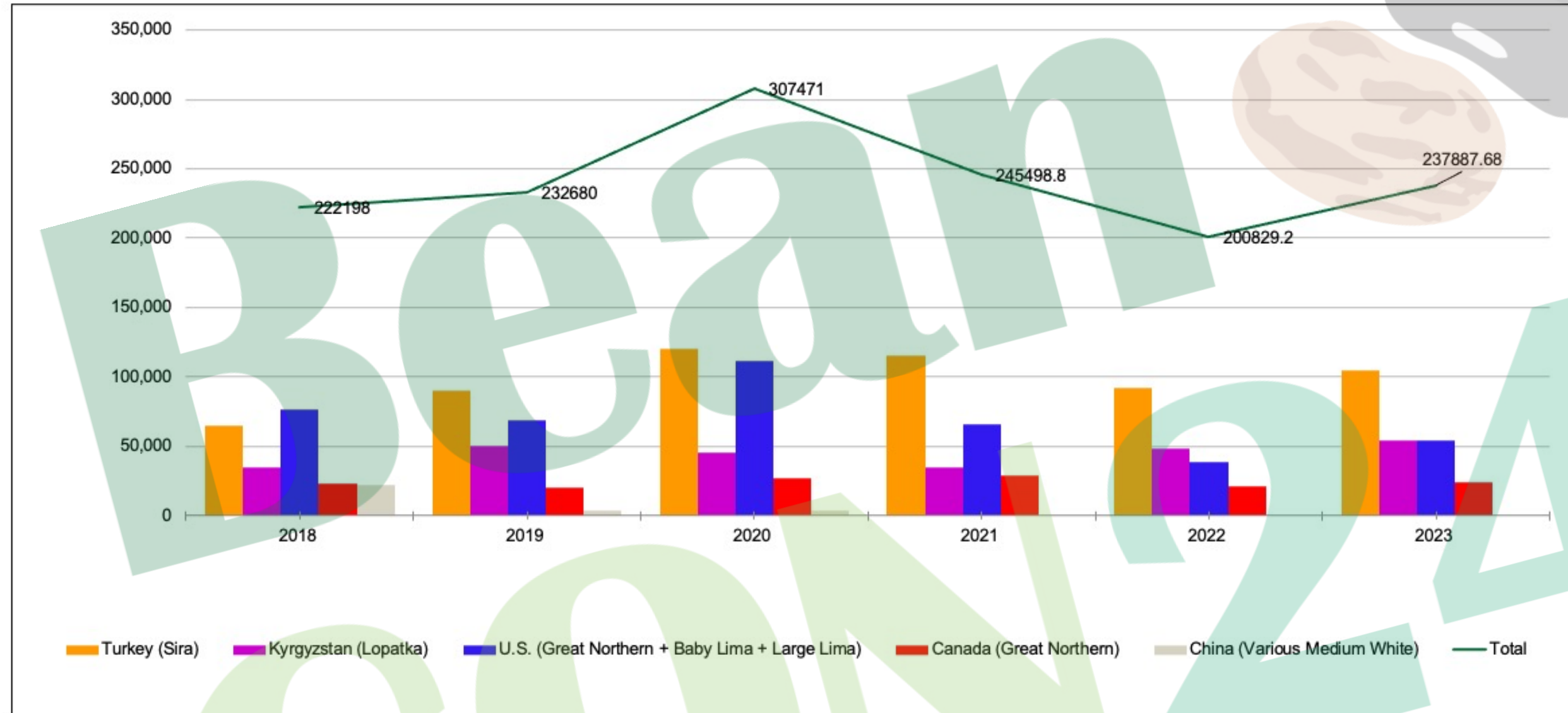
# Small White Bean Production (MT)



Item	2019	2020	2021	2022	2023	Average	2022/2023 vs Average
Ethiopia (Pea Bean)	151,000	173,000	158,000	210,000	168,000	173,000	-3%
U.S. (Navy)	140,387	237,653	158,306	163,477	145,515	174,956	-17%
Canada (Navy)	88,000	105,000	77,500	69,000	81,000	84,875	-5%
Ukraine (Pea Bean)	25,000	30,000	37,500	48,000	48,000	35,125	37%
Total	404,387	545,653	431,306	490,477	442,515	467,956	-5%



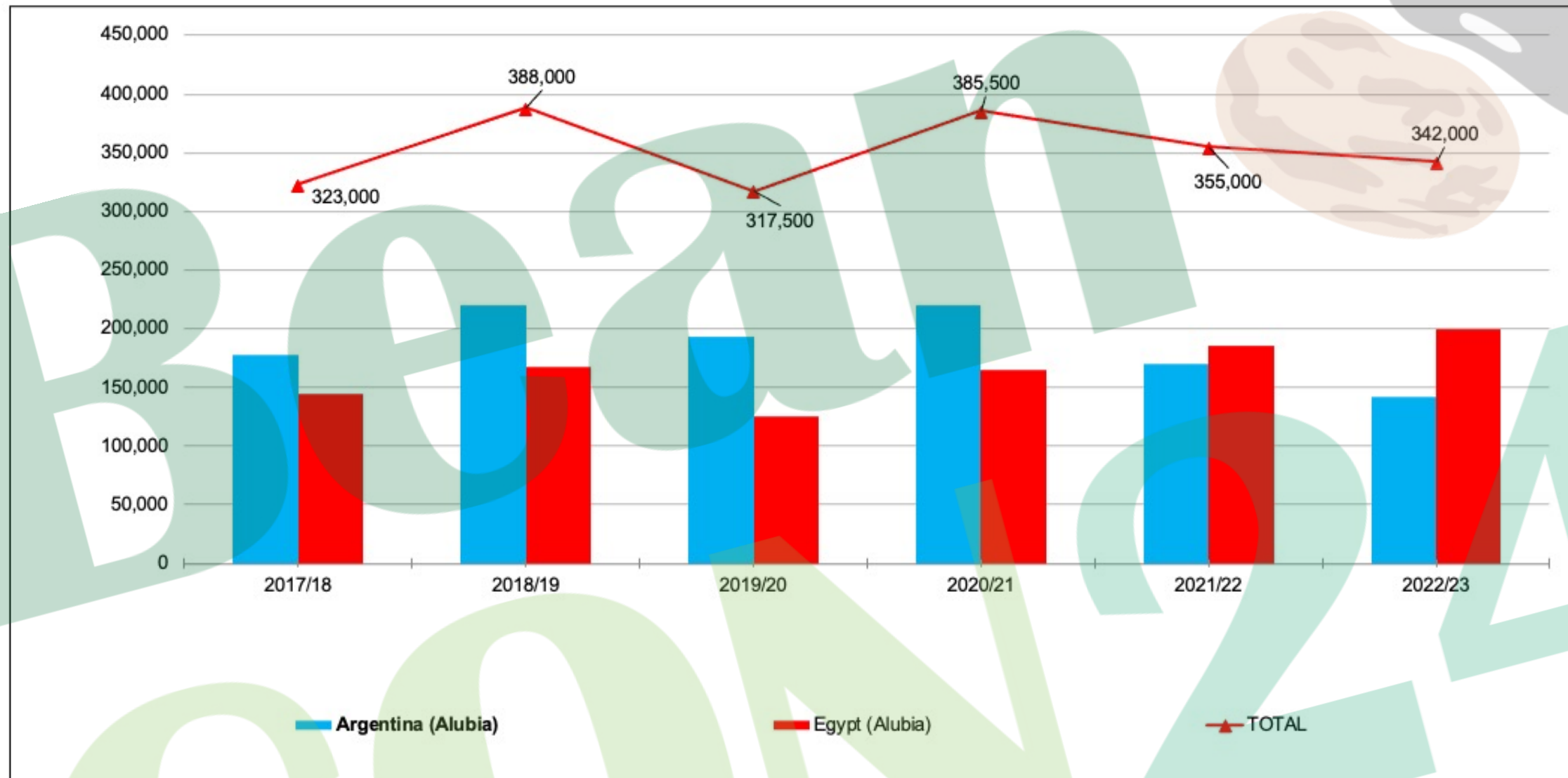
# Medium White Bean Production (MT)



Etiquetas de fila	2019	2020	2021	2022	2023	Average	2023 vs Average
Turkey (Sira)	90,000	120,000	115,000	92,000	105,000	104,250	1%
U.S. (Great Northern + Baby Lima + Large Lima)	68,765	111,664	65,999	38,329	53,888	71,189	-24%
Kyrgyzstan (Lopatka)	50,000	45,000	35,000	48,000	54,000	44,500	21%
Canada (Great Northern)	19,915	26,807	29,000	21,500	24,500	24,306	1%
China (Various Medium White)	4,000	4,000	500	1,000	500	2,375	-79%
<b>Total general</b>	<b>222,198</b>	<b>232,680</b>	<b>307,471</b>	<b>256,567</b>	<b>206,088</b>	<b>254,729</b>	<b>-19%</b>



# Large White Bean Production (MT)



Etiquetas de fila	2018/19	2019/20	2020/21	2021/22	2022/23	Average	2023 vs Average
Argentina (Alubia)	220,000	192,500	220,500	170,000	142,000	200,750	-29.3%
Egypt (Alubia)	168,000	125,000	165,000	185,000	200,000	160,750	24.4%
Total general	388,000	317,500	385,500	355,000	342,000	361,500	-5.4%



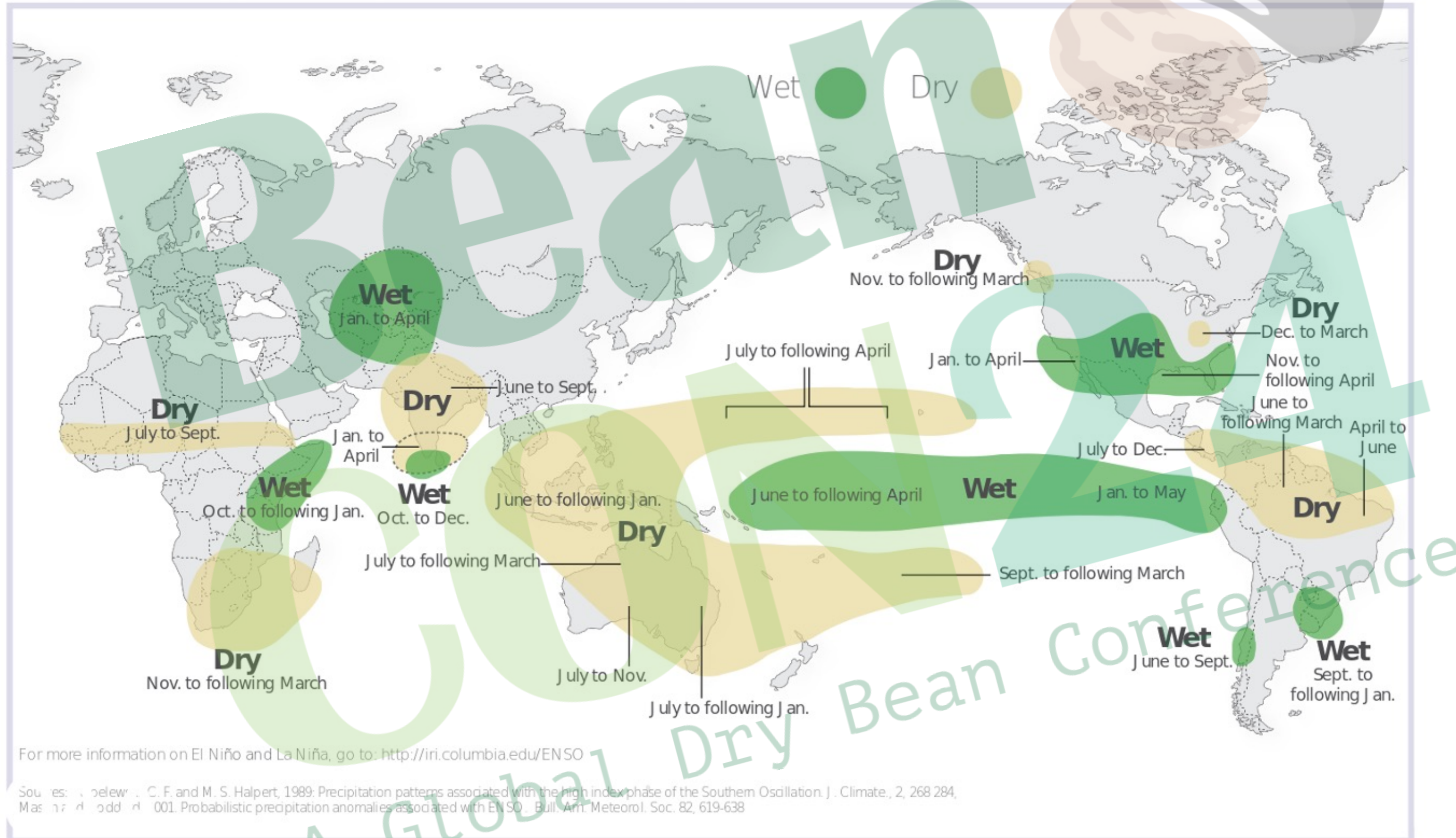


# ENSO forecast for 2024 and its effects on Dry Bean Production



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



# Dry Bean Production: Climate Forecasts

El Niño is expected to continue for the next several seasons, with ENSO-neutral favored during April-June 2024 (73% chance).

The most recent IRI plume indicates El Niño will gradually weaken and then transition to ENSO-neutral during spring 2024.

Some state-of-the-art dynamical climate models suggest a transition to ENSO-neutral as soon as March-May 2024. The forecast team, however, delays this timing and strongly favors a transition to ENSO-neutral in April-June 2024. There are also increasing odds of La Niña in the seasons following a shift to ENSO-neutral. It is typical for El Niño to peak in December/early January, but despite weakening, its impacts on the United States could last through April

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# Summary: Factors Affecting Production and Market



Inflation / Production costs	Brazil transitioning to net exporter?
Biofuels	Will production in Central America get back on track?
Mexico / Central America will need to re-stock	Importers plead for the elimination of import duties (MX, CR)
Weather-related production issues in Mexico and Argentina	Corn and soybean prices ease
China transitioning to net importer?	



# PRODUCCIÓN DE FRIJOL EN MÉXICO

CICLO PRIMAVERA-VERANO 2023

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**Bean  
CON24**

A Global Dry Bean Conference

**CANCUN, MEXICO**  
FEBRUARY 01-03, 2024



# SIEMBRAS Y PRODUCCIÓN POR ESTADO ESTIMADO VS SIAP

Ciclo primavera-verano 2023

## NACIONAL

SIAP 386,623 TON. **EST.**  
**239,998 TON.**  
**VAR. -37.9%**

## Durango

SIAP 49,391 TON. **EST.**  
**38,752 TON.**  
**VAR. -21.5%**

## San Luis Potosí

SIAP 10,552 TON. **EST.**  
**12,223 TON.**  
**VAR. 15.8%**

## Chihuahua

SIAP 20,872 TON. **EST.**  
**5,589 TON.**  
**VAR. -73.2%**

## Zacatecas

SIAP 144,381 TON.  
**EST. 90,340 TON.**  
**VAR. -37.4%**

## Guanajuato

SIAP 38,186 TON. **EST.**  
**12,791 TON.**  
**VAR. -66.5%**

STATE	SUPERFICIE (has)			PRODUCCIÓN (metric tons)	RENDIMIENTO (ton/ha)
	SEBRADA	SINIESTRADA	COSECHABLE		
<b>SIAP</b>					
Noviembre 2023					
<b>TOTAL</b>	<b>815,273</b>	<b>165,667</b>	<b>649,606</b>	<b>386,623</b>	<b>0.595</b>
Chihuahua	34,595	16,286	18,309	20,862	1.139
Durango	151,724	0	151,724	49,391	0.326
Guanajuato	57,642	0	57,642	38,186	0.662
San Luis Potosí	55,158	31,529	23,629	10,552	0.447
Zacatecas	311,886	116,451	195,435	144,381	0.739
Others	204,269	1,401	202,868	123,252	0.608
<b>ESTIMADO</b>					
Noviembre 2023					
<b>TOTAL</b>	<b>764,893</b>	<b>223,982</b>	<b>540,911</b>	<b>239,988</b>	<b>0.444</b>
Chihuahua	9,247	1,813	7,434	5,589	0.752
Durango	154,837	39,200	115,637	38,752	0.335
Guanajuato	26,841	4,150	22,691	12,791	0.564
San Luis Potosí	51,687	16,076	35,611	12,223	0.343
Zacatecas	362,227	139,243	222,984	90,340	0.405
Others	160,054	23,500	136,554	80,294	0.588
<b>VARIATION (%)</b>	<b>-6.2</b>	<b>35.2</b>	<b>-16.7</b>	<b>-37.9</b>	<b>-25.5</b>

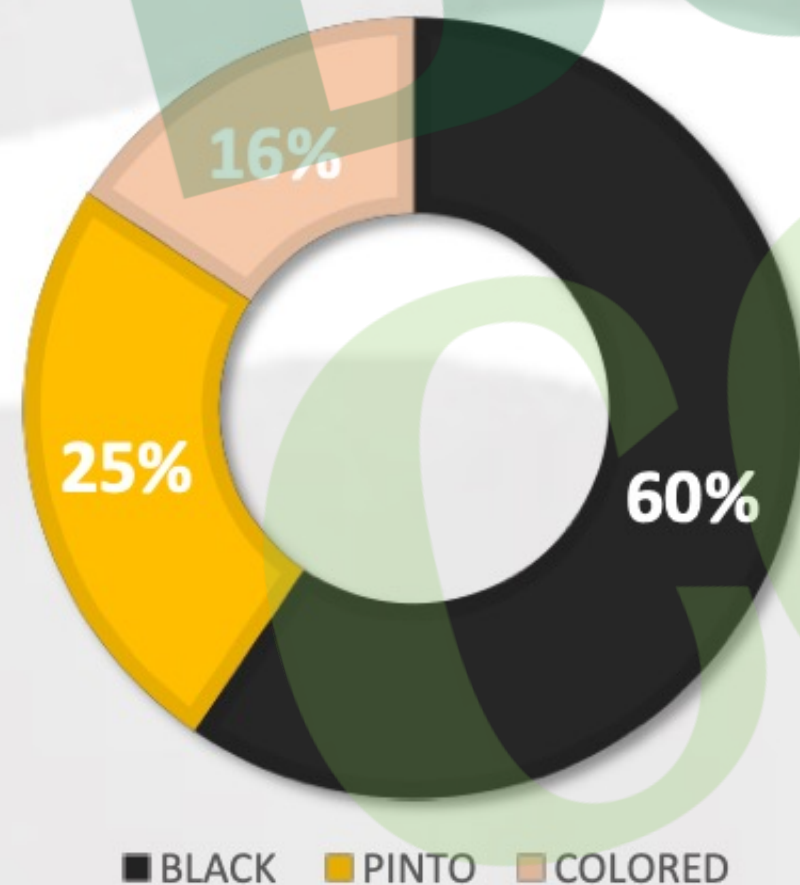
Se calcula que la producción, a nivel nacional, del ciclo PV-2023 es de 239,988 toneladas, 37.9% inferior comparada con la proyección del SIAP (386,623 toneladas) y 69.7% por debajo, respecto al promedio histórico 2016-2022 (791,655 toneladas).



## PRODUCTION BY STATE AND VARIETY (metric tons)

PV-2023 (Est. November 2023) <sup>1/</sup>

TOTAL	142,804	59,482	37,702	239,988
CHIHUAHUA		5,589		5,589
DURANGO	13,563	25,189		38,752
GUANAJUATO	6,395	2,558	3,837	12,791
SAN LUIS POTOSÍ	6,112	6,112		12,223
ZACATECAS	67,755	16,261	6,324	90,340
OTHERS	48,979	3,774	27,541	80,294
<b>VARIATION (%) 2023/2022</b>	<b>-44.9</b>	<b>-66.4</b>	<b>-24.0</b>	<b>-50.6</b>



## PRODUCCIÓN POR ESTADO Y VARIEDAD

Ciclo primavera-verano 2023



Se prevé que 60% de la producción será de frijol negro, equivalente a 142,804 toneladas, 44.9% por debajo que lo reportado en el PV-2022; 59,482 toneladas de pinto (25% del total), lo que representa una caída de 66.4%, respecto del ciclo homologado anterior; y 37,702 toneladas de frijol de color (16% del total), 24.0% menos, respecto del año previo.

La cosecha en los 5 estados objeto de estudio es de 159,695 toneladas (66.5% del total del PV-2023), de las cuales **21 mil toneladas tendrán como destino el auto consumo y semilla para siembra, por tanto, la producción comercializable es de 138,695 toneladas, 57.2% por debajo, respecto del PV-2022 (324,056 toneladas).**

Source: Estimaciones propias con base en la 3er. visita de campo.

1/ Estimado del producción (noviembre) para el PV-2023

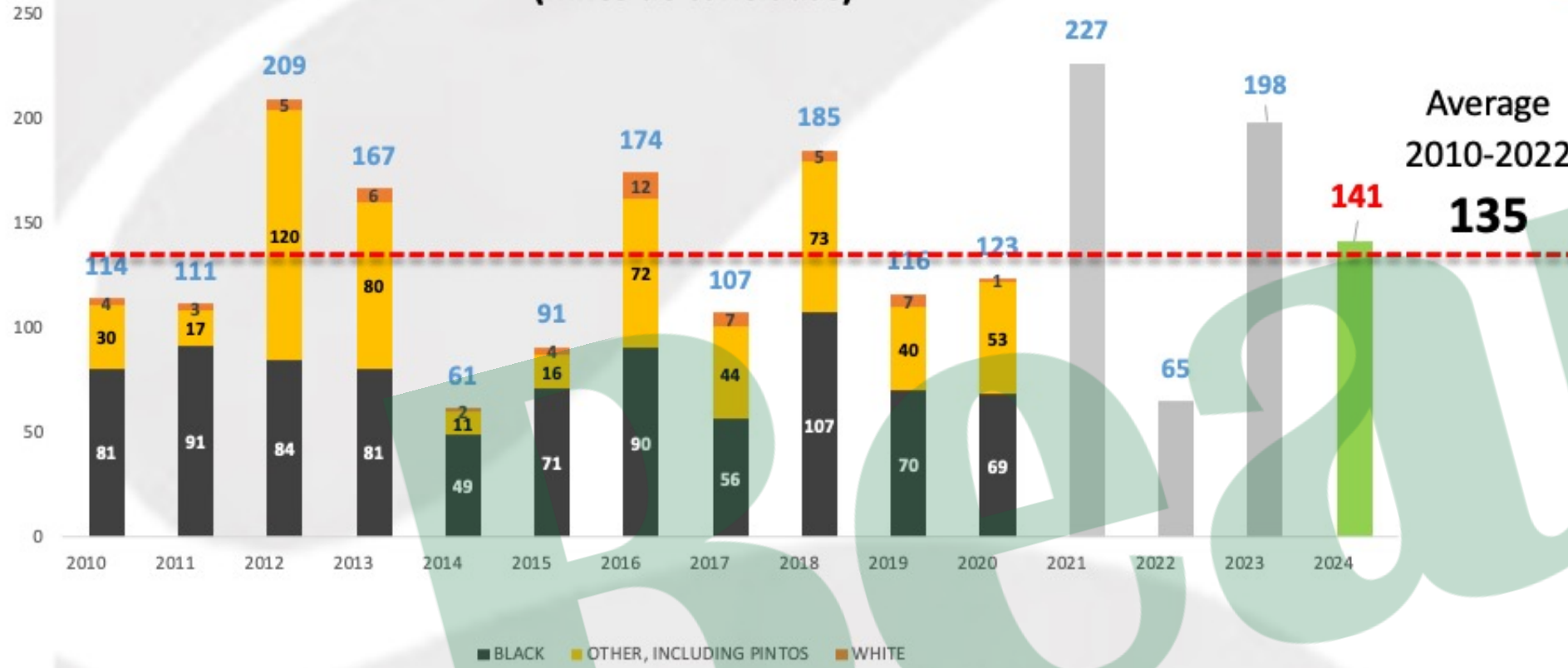


# COMERCIO EXTERIOR DE FRIJOL

Año comercial 2010- 2024



**IMPORTACIONES MEXICANAS DE FRIJOL 2010-2024**  
(miles de toneladas)



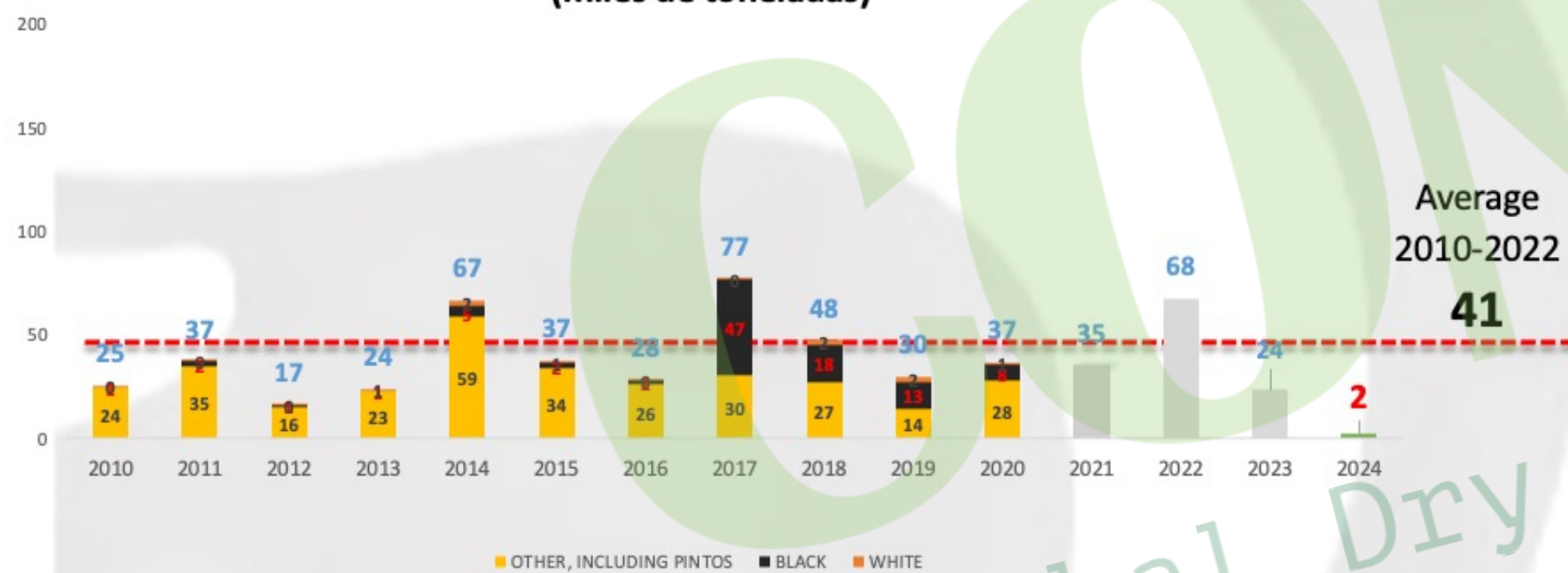
Al cierre del año comercial 2022/2023 (oct-22 a Sep-23), las importaciones son por 198 mil toneladas, cifra 3.04 veces por arriba, respecto de 2021/2022 (65 mil toneladas), superando en 47.3% al promedio de adquisiciones 2010-2022 (135 mil toneladas).

El avance de compras al exterior, al mes de diciembre, correspondiente al año comercial 2023/2024 observa un volumen de 141 mil toneladas, 4.03 veces más que similar lapso de 2022/2023 (35 mil ton).

Por otra parte, al finalizar el año de mercado 2022/2023, las exportaciones son por 24 mil toneladas, 64.9% menos de las alcanzadas en el 2021/2022, siendo 41.5% inferiores al promedio de ventas al exterior (41 mil toneladas).

En lo que va del año comercial 2023/2024 (octubre-diciembre 2023) se han exportado 2 mil toneladas, 72.7% por debajo en comparativo anual.

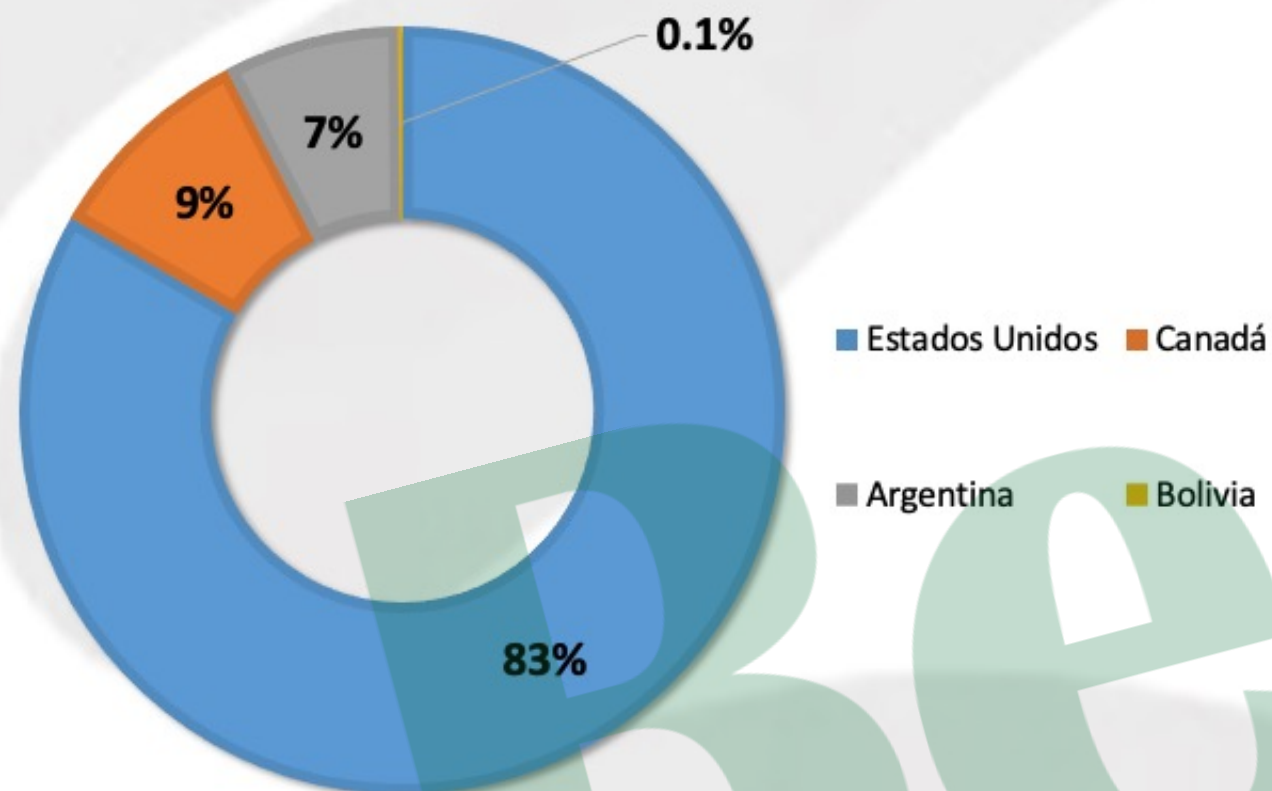
**EXPORTACIONES MEXICANAS DE FRIJOL 2010-2024**  
(miles de toneladas)



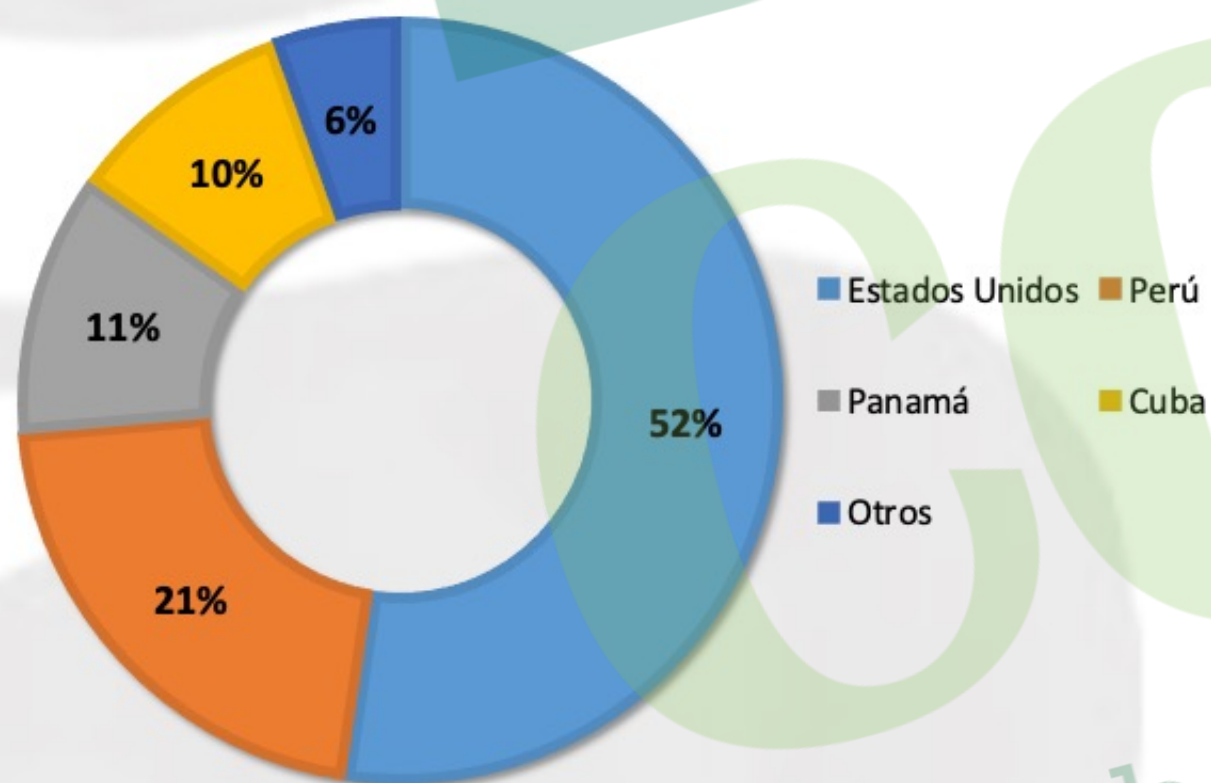
Source: Agencia Nacional de Aduanas de México (ANAM).  
Año comercial Octubre – Septiembre de cada año.



## ORIGEN DE LAS IMPORTACIONES 2022/2023 (%)



## DESTINO DE LAS EXPORTACIONES 2022/2023 (%)



# COMERCIO EXTERIOR DE FRIJOL

Por país de origen/destino, año comercial



## COMERCIO EXTERIOR DE FRIJOL POR PAIS (toneladas)

Septiembre-octubre de cada año

PAIS / AÑO	2021/2022	2022/2023
<b>IMPORTACIONES</b>		
Estados Unidos	60,073	165,467
Canadá	4,236	17,984
Argentina	295	14,678
Bolivia		288
<b>Total</b>	<b>64,604</b>	<b>198,417</b>
<b>EXPORTACIONES</b>		
Estados Unidos	26,470	12,487
Perú	1,709	5,078
Panamá	4,550	2,664
Cuba	9,643	2,330
Otros	25,639	1,293
<b>Total</b>	<b>68,011</b>	<b>23,850</b>

Estados Unidos se mantiene como el principal país de origen y destino del comercio exterior mexicano de frijol.



# BALANZA DISPONIBILIDAD-CONSUMO



Año comercial 2023/2024

Thousands of Metric Tons

MONTH	SUPPLY				DEMAND					Final Inventory
	Total	Initial inventory	Production	Import	Total	Export	Consumption <sup>1/</sup>	Seed	Loss	
<b>Oct 23/Sep 24</b>	<b>914</b>	<b>108</b>	<b>522</b>	<b>285</b>	<b>819</b>	<b>10</b>	<b>750</b>	<b>40</b>	<b>20</b>	<b>95</b>
Oct-23	191	108	34	48	54	1	50	1	3	136
Nov-23	309	136	129	44	59	1	49	3	6	250
Dec-23	363	250	63	49	84	1	78	1	4	278
Jan-24	309	278	13	17	67	0	65	1	1	242
Feb-24	338	242	82	13	65	1	61	0	3	273
Mar-24	416	273	126	16	74	1	71	0	2	342
Apr-24	394	342	35	17	75	1	73	0	1	318
May-24	361	318	24	19	69	2	66	1	0	292
Jun-24	318	292	14	12	82	1	72	9	0	236
Jul-24	253	236	-	17	80	1	63	16	0	173
Aug-24	187	173	-	14	58	1	51	6	0	130
Sep-24	147	130	-	17	52	1	50	1	0	95

**Notes:**

- 1/ Includes self- consumption
- Estimation 2023-SS: 281,555 MT
- Estimation-2023/2024-FF: 281,55 MT
- January 2024 Update

Para el año comercial 2023/2024, se espera un consumo de 750 mil toneladas, equivalente a un promedio mensual de 63 mil toneladas; correspondiente a un consumo per cápita de 5.8 kg.

Así mismo, las importaciones podrían lograr 285 mil toneladas, 43.9% más que lo adquirido en el año anterior y exportaciones de 10 mil toneladas, 58.3% menos respecto de 2022/2023.

Se espera un inventario final de 80 mil toneladas, 12.0% por debajo que hace un año.

Source: Estimaciones propias con base a las vistas de campo, información del SIAP y datos de la Agencia Nacional de Aduanas de México (ANAM).



# ESQUEMAS DE APOYO GUBERNAMENTALES

## PROGRAMA DE FERTILIZANTES



Entrega de fertilizante  
**DE FORMA GRATUITA**  
a productores.

## PRECIOS DE GARANTÍA PARA FRIJOL



Precio garantizado  
**\$21,000 PESOS POR TONELADA**  
hasta 15 toneladas por productor.

## EXCENCIÓN PAGO DE ARANCEL



Se exenta el pago de arancel  
**DIVERSOS PRODUCTOS DE LA CANASTA BÁSICA.**



1. La cosecha del PV-2023 ha sido una de las peores que se hayan registrado en los últimos 20 años, lo anterior producto de las contingencias climatológicas cada vez más recurrentes (atraso en lluvias y sequía). El único mecanismo que se tienen para completar la oferta interna es por medio de las importaciones lo que implica incrementar nuestra dependencia al exterior.
2. El Gobierno mexicano no cuenta con programas que contribuyan a incrementar la producción de frijol.
3. Hoy tenemos un mercado de precios altos y un consumo a la baja.
4. Si las condiciones de sequía se mantienen en el país, aunado a la falta de semilla, el nulo financiamiento (70% de los agricultores financian su actividad productiva a por medio de las remesas) al sector agrícola y el aumento en los insumos; el mayor impacto de la escases de frijol en México la podríamos observar en el PV-2024, lo que sugeriría continuar con las importaciones.