USDBC Mexico Report

Mexico Crop and Market Update
July 2025 USDBC Report



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USDBC Mexico July 2025 Monthly Report

2025 Spring-Summer Beans - August 1st Update

- Until June 30th, the government reported that 328,915 hectares have been planted, with Zacatecas panting closet 100 thousand hectares and San Luis Potosi over 53 thousand hectares, together accounting almost 50% of the planted.
- Precipitations continued to favor the bean areas and at the end of July, reportedly, Zacatecas, Durango and Chihuahua, have planted around 50% of their dry bean planting areas
- -Planting Intention was published in mid-July, based on the amount of rainfall received in June and first 10 days of July, that helped to gradually reverse the intense drought, the government assessed the potential and now expects that 1.3 million hectares will be planted nationwide with dry beans this cycle, +8.3% higher than in 2024, expecting a total production of 857 thousand MT, +8% higher than in 2024.
- -According to this intention, the five states followed by the USDBC are expected to plant 82.5% of the total 1,095,772 hectares, and contribute with 75% 641,406 MT of the total production:

48% - 630,714 has. in Zacatecas, expecting a production of 331,701 MT

17% - 219,852 has. in Durango, expecting a production of 130,961

9% - 123,256 has. in San Luis Potosi, expecting a production of 67,658 MT

5% - 75,520 has. in Chihuahua, expecting a production of 73,773 MT

3.5%-46,230 has. in Guanajuato expecting a production of 37,373 MT

- Small bean producers in Zacatecas, Durango and Chihuahua, received San Luis Black and Pinto Saltillo seed in the last days of June, with 75% subsidy: 50% paid by the federal government, 25% by the state government and 25% the producers. Zacatecas was the main receiver of the certified seed, however, producers considered that seed was low-quality. Durango reportedly received less subsidized seed and is completing with 2024 pinto Saltillo beans, to plant this cycle.



	SURF	ACE - HECTARES	PRODUCT	ION - MT	YIELD KG/HA			
STATE	Government's Planting Intention hectares	Planted hectares according to Government	Harvested according to government	Damaged according to government	Government Expectation	Obtained according to Government	Expected by Government	Obtained according to Government
CHIAPAS	72,625	52,651	-	2	44,688		620	· · · · · · · · · · · · · · · · · · ·
CHIHUAHUA	75,520	12,139			73,773		980	
DURANGO	219,852	1,411			130,961		600	
GUANAJUATO	46,230	24,498			37,373		810	
GUERRERO	13,182	1,199			11,493		870	
MEXICO	2,623	1,878	-		2,976		1,130	
MICHOACAN	2,420	1,137			3,033		1,250	
OAXACA	28,062	15,722	-		21,640		770	
PUEBLA	42,789	35,995			37,200		870	
QUERETARO	3,322	2,461			2,619		790	
SAN LUIS POTOSI	123,256	53,863			67,658		550	
ZACATECAS	630,714	99,119			331,701		530	
OTHER	50,976	26,843	-		91,947		1,804	
TOTAL	1,311,571	328,915	•	148	857,062		650	

Source: SIAP

Mexican Market Situation August 1st, Update

- -After announcing on July 12th, the implementation of tariffs as part of Fentanyl Sanctions. On July 30th, President Trump paused for 90 days the 30% Tariffs to Mexican imports on that were scheduled to start on August 1st
- -The tariffs that remain in place: **Steel, Aluminum, Beer, Beer Cans and Cars made in Mexico**, On June 3rd, President Trump announced the increase of these tariffs to 50%, -up from 25% last month, effective first minute of June 4th. **Mexican Tomatoes** receiving 20.91% tariff since July 14, 2025
- -Importers concerned about the potential black bean prices drop, with enough stocks of imported beans purchased at high prices, due to the good planting expectations in Mexico, high inventories, and coming volumes from Brazil, Argentina. Reportedly, around 5 thousand MT of Brazilian black beans, will arrive to Mexico soon
- -Price lowering factors include Argentina and Brazil's production, that reportedly will be enough to export to Mexico, currently offering prices around US\$730/MT for Brazilian black beans, and US\$800 for Argentinean blacks, and Mexico with the potential to plant a larger area than in the past three years.
- -Total Bean imports from all origins continued mounting into May 2025, accumulating 216,645 MT 82% of the market share, with a value of US\$229,051,261 million, extremely high, considering the high stocks in hands of the importers since earlier this year. Accumulated US bean imports in the September-May period of the Commercial Year 2025, reached 164,830 MT / US\$176,667,455 with 76% of the market share until May



	2022-20	25 September t	o Augus	t - U.S. DRY	BEANS to ME	XICO .	USDA CO	MMERCIAL YE	AR IMP	ORTS ace	cording to Mex	ican da	ta		
		2021			2022			2023			2024		2025	(Set2024-May 2025	5)
TARIFF CODE / DESCRIPTION	MT	US\$	Market Share %	MT	US\$	Market Share %	MT	US\$	Market Share %	MT	US\$	Market Share %	МТ	US\$	Marke Share
	n/a	n/a		n/a	n/a		n/a	n/a		n/a	n/a		n/a	n/a	
Black, pinto, white and	n/a	n/a		n/a	n/a		n/a	n/a		n/a	n/a		n/a	n/a	
other beans 0713.33.99	210,016	188,214,078	90%	61,622	69,555,586	92%	145,773	171,509,346	84%	331,777	403,389,678	73%	164,830	176,667,455	76%
TOTAL	210,016	\$188,214,078	90%	61,622	\$69,555,586	92%	145,773	\$171,509,346	84%	331,777	\$403,389,678	73%	164,830	\$176,667,455	76%

	INICATOO S L	Dry Bean Impo	orts-All Origin		
All beans: pintos, black, white, all 0713.33.99	COUNTRY OF ORIGIN	VOLUME IN KILOGRAMS	VOLUME METRIC TONS	Avg. market share USA 76%	COMMERCIAL VALUE \$USD
TOTAL	ALL	216,645,052	216,645		\$229,051,261
May 2025	USA	20 072 554	20.072	0.00/	40.000.040
May 2025 May 2024	CANADA	20,072,554 2,554,580	20,073 2,554	82% 10%	19,623,349
May 2024	BRAZIL	1,605,000	1,605	7%	2,678,214 1,420,90
May 2024	CHINA	1,003,000	0	0.0%	1,420,50
May 2024	ARGENTINA	250,000		1.0%	203,203
Subtotal		24,482,134	24,482	100%	23,925,666
April 2025	USA	22,904,454	22,904	81%	23,296,087
April 2025	CANADA			17%	
April 2025	ARGENTINA	4,805,060	4,805	0%	5,126,991
April 2025	CHINA	0	- 0	0%	
April 2025	BRAZIL	500,000	500	2%	464,250
Subtotal	D. V 16.16	28,209,514	28,209	100%	28,887,328
March 2024	USA	20 046 662	20.545	0.401	24 802 222
March 2025	CANADA	20,816,663 3,579,844	20,816 3,580	84% 15%	21,892,098
March 2025	BRAZIL	250,000	250	1%	3,855,884
March 2025	CHINA	24,971	250	0%	74,766
Majori 2020	Subtotal	24,671,478	24,671	100%	26,050,24
F-1					
February 2025 February 2024	USA	14,246,698	14,247	90%	15,021,206
February 2024	CANADA ARGENTINA	1,482,388	1,482	9% 0%	1,614,35
February 2024	CHINA	42,000	42	1%	81,552
T COI daily 2024	Subtotal	15,771,086	15,771	100%	16,717,113
January 2025	USA	9,602,620	9,603	70%	10,081,604
January 2025	CANADA	3,675,598	3,676	27%	3,983,869
January 2025	ARGENTINA	0		0%	
January 2025	CHINA	0	0	0%	550.00
January 2025	BRAZIL Subtotal	500,000 13,778,218	500 13,778	3% 100%	550,000 14,615,47
December 2024	USA	8,076,579	8,077	91%	8,820,750
December 2024	CANADA	698,433	698	8%	792,887
December 2024	BOLIVIA	72,000	72	2%	93,600
	Subtotal	8,847,012	8,847	100%	9,707,243
November 2024	USA	19 222 052	49 222	729/	20 224 201
November 2024	CANADA	18,332,953 2,864,135	18,333 2,864	73% 11%	20,231,28 : 3,176,263
November 2024	ARGENTINA	3,078,260	3.078	12%	3,176,263
November 2024	BRAZIL	1,000,000	1,000	4%	1,170,000
	Subtotal	25,275,348	25,275	100%	28,133,35
0-1-1	1164	*****			
October 2024	CANADA	30,101,643	30,102	70%	33,718,114
October 2024 October 2024	CANADA ARGENTINA	4,909,328 7,555,050	4,909	11%	5,567,428
October 2024	BRAZIL	375,000		18%	8,796,703 454,756
	Subtotal	42,941,021		100%	48,536,99
C	116.5				
September 2024	USA	20,675,243		63%	23,982,95
September 2024	ARGENTINA	9,012,290	9,012	28%	10,909,336
September 2024	BRAZIL	1,847,600		6%	2,182,24
September 2024	CANADA Subtotal	1,134,108 32,669,241		3% 100%	1,403,29 38,477,83



Agricultural Year Summary - Mexican Bean Crop - Government Numbers

2020-2025 Information obtained from the Agricultural Years' Official Closing including Spring-Summer and Fall-Winter cycles *Government numbers used here, are only a reference, as these are potentially 30% higher than reality

STATE	2025 Fall	2025 Fall Winter+ Spring-Summer June 30, 2025 Update									
	Intention	Planted has.	Harvested	Yield kg	Production MT						
Zacatecas	630,714	99,119									
Durango	219,852	1,411									
Chihuahua	75,720	12,139									
Chiapas	72,625	52,651	Carlotte St.								
San Luis Potosi	123,256	53,863									
Guanajuato	46,230	8,470									
Sinaloa	90,718	109,753	86,248	1,950	167,863						
Nayarit	62,910	64,651	52,993	860	45,786						
Other States	245,074	201,488	66,861	728	48,714						
Total	1,567,099	603,454	206,102	1,270	262,363						

Source: Prepared by Mercalimentos with Mexican Department of Ag (SADER) Ag. Information agency (SIAP)

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MX DRY BEANS HISTORIC - AGRICULTURAL YEAR TWO CYCLES - SEPTEMBER TO AUGUST NEXT YEAR									
		METRIC	TONS - G	OVERNI	MENT NUI	MBERS			
	2020	Variation	2021	Variation	2022	Variation	2023	Variation	2024 Year Closing
Carry in est.	335,000	10.18%	369,089	71.58%	633,273	-19.37%	510,582	-45.12%	280,199
Ag.Y Production	1,056,071	10.89%	1,171,108	-17.57%	965,371	-25.04%	723,642	40.21%	1,014,631
Imports	116,392	95.67%	227,742	-70.26%	67,730	150.96%	169,975	168.73%	456,777
Total Supply	1,507,463	17.21%	1,766,939	-5.69%	1,666,374	-15.73%	1,404,199	24.74%	1,751,607
Annual Demand EST.	1,098,000	0.00%	1,098,000	0.00%	1,098,000	0.00%	1,098,000	0.00%	1,098,000
Exports	41,734	-14.54%	35,666	62.04%	57,792	-55.01%	26,000	15.38%	30,000
Carry Over (EST)	368,089	72.04%	633,273	-19.37%	510,582	-45.12%	280,199	122.56%	623,607

Source: Prepared by Mercalimentos with Mexican Department of Ag (SADER) Ag. Information agency (SIAP)

2025 FALL-WINTER GARBANZOS – July 30th Update

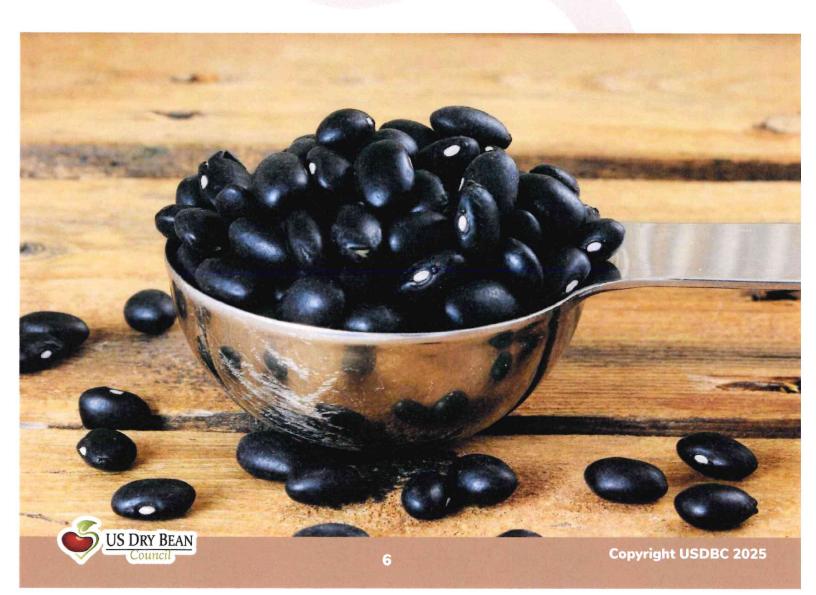
- 2025 chickpea production final numbers in Sinaloa continues at 150 thousand MT
- Price paid to producer remains around MX\$19,000 / US\$950 per MT, under the reference price of MX\$21 thousand / US\$1,000 pesos per MT of garbanzo, set by the government
- Garbanzo exports continue progressing and in the commercial year June to May 2025, exports reached 163,560. Top 5 export markets for MX garbanzos in this period: Turkey 66,967 MT / US\$104.9 million, 42%; Spain 18,450 MT/ US\$23.6 million 9.5%; Algeria 10,486 MT / US\$18.3 million 7.4%; USA 10,252MT / US\$15 million, 6.1%; UAE 8,124 MT / US\$11.7 million, 4.8%.

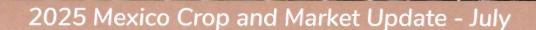


Mexico National - 5 Y Grabanzo-Chickpea Plant	ing-Harvesti	ng -Productio	n Hectares -	MT FALL-WIN	ITER CROP
According to Government - End of 2025 FW Cycle:	2021	2022	2023	2024	2025 *Until May 2025
Government's Planting Intention - hectares nationwide	88,471	96,349	114,830	86,874	92,771
Planted Government - hectares natiowide	87,493	104,978	66,513	122,186	118,207
Harvested Government - hectares nationwide	87,493	104,978	66,484	121,814	111,016
Planted Government - hectares in Sinaloa					90,829
Harvested Government - hectares in Sinaloa					85,203
Own Est. w/local trade assoc and government:					
Production - MT in Sinaloa	165,372	178,423	130,418	260,514	150,000
Apparent Carry-in MT	132,355	127,203	119,207	91,197	177,313
Seed, waste and domestic consumption MT	30,000	30,000	30,000	30,000	30,000
subtotal	267,727	275,626	219,625	313,906	297,313
Exports- customs *June to May every year MT	140,524	156,419	128,428	136,593	163,560
Apparent carryover MT	127,203	119,207	91,197	177,313	*133,753
Average Price Paid to Producer per MT	US\$800	US\$1,050	US\$1,050	US\$750	US\$1,000
Average Export Price per MT	US\$1,045	US\$1,301	US\$1,568	US\$1,688	US\$1,510

^{*} Blue numbers are Est. / *Numbers until May 2025

Source: Prepared by Mercalimentos with SIAP,own and trade estimations and Mexican Customs





CENTRAL MARKET PRICES AND ANALYSIS BY USDBC

USDBC Disclaimer: In the following section the USDBC Mexico office analyzes dry bean prices from SNIIM reports. In addition, the USDBC Mexico office place calls to the Mexican trade to complement the information. The USDBC will not be responsible for third party transactions based on this report.

- US Black beans average prices in July vs. June 2025: In Mexico City, -6.7 reduction; -9% in Monterrey and a slight recovery of +3% in Guadalajara. Average price remains at MX\$31.5 / US\$1.5 per kilo. Despite of the decreases in July, for fourth consecutive month, US black prices were 3% higher than MX blacks avg. price.
- US Pinto beans prices in July vs. June 2025, were steady in Mexico City and in Monterrey, however, registered a big drop of -20% in Guadalajara. Avg. price passed from MX\$31 / US\$1.55 to MX\$28 / US\$1.35 per kilo. This month US pinto prices were +9% higher than average price of MX pintos MX\$26 / US\$1.35 per kilo
- U.S. Large and Small Alubias Prices in July vs. June 2025, large and small alubias, after having a big increase of +21% in Monterrey last month, in July, they lost -20%, and in Guadalajara recovered 7% after last month's -19% reduction. Prices remained in the area of MX\$30 to MX\$37 per/ US\$1.55 to US\$1.80 per kilo, depending on size and market
- Peruanos, Mayocoba, Azufrados prices in July vs. June 2025, stable in MX City, Monterrey, and Guadalajara, from MS\$29 to MX\$33 US\$1.45 to US\$1.6 per kilo. Azufrado prices decreased -10%, now at MX\$45 / US\$2., down from MX\$49 / US\$2.45 per kilo
- Mexican colored varieties: Bayos, Canario, Cacahuate, Flor de Mayo and Flor de Junio prices, July vs. June 2025 steady, prices still around MX\$32 / US\$1.60 per kilo. Bayo beans continue at very high prices of up to MX\$59 / US\$2.90 per kilo
- Mexican Small & Large Garbanzos prices in July vs. June 2025, large garbanzos in Mexico City,
 Monterrey and Guadalajara starting to settle down with avg. prices MX\$33 / US\$1.65 per kilo.





		MONTE	ILY CENTRA		July 2025 vs WHOLESALE		VHOLESALI	E REPORT		
PRODUCT	product origin		ICO CITY	VAR		TERREY	VAR price		LAJARA S/KG)	VAR
VARIETY	state / country	current 07 30 25	past 06 30 25	%	current 07 30 25	past 06 30 25	%	current 07 30 25	past 06 30 25	%
Imported Black	Imported	28.00	30.00	-6.67%	30.00	33.00	-9.09%	32.00	31.00	3.23%
Jamapa Black	Zacatecas							31.00	31.00	0.00%
Nayarit Black	Nayarit	26.00	26.00	0.00%				26.00	34.00	-23.53%
San Luis Black	Zacatecas	34.00	34.00	0.00%				30.00	36.00	-16.67%
Veracruz Black	Veracruz	35.00	35.00	0.00%						0.00%
Imported Pintos	Imported	28.00	28.00	0.00%	29.00	29.00	0.00%	26.50	33.00	0.00%
Pinto Saltillo	Zacatecas									
Pinto Saltillo	Nayarit							26.50	26.00	1.92%
Pinto Saltillo	Chihuahua	28.00	28.00	0.00%	25.00	25.00	0.00%			0.00%
Pinto Saltillo	Durango						0.00%			
Small Alubia	Imported	30.50	30.50	0.00%	32.00	40.00	-20.00%	32.00	30.00	6.67%
Large Alubia	Imported	37.50	37.50	0.00%	32.00	40.00	-20.00%	34.00	34.00	0.00%
Flor de Junio	Zacatecas	31.00	32.00	-3.13%				27.00	26.00	3.85%
Flor de Mayo	Zacatecas	32.00	34.00	-5.88%				28.00	26.00	7.69%
Bayo Berrendo	Jalisco							35.00	35.00	0.00%
Bayo	Zacatecas	39.00	39.00	0.00%				59.00	53.00	11.32%
Garbancillo	Zacatecas	46.50	46.50	0.00%						0.00%
Canario	Sinaloa							28.00	28.00	0.00%
Cacahuate Bola	Jalisco	36.00	33.00	9.09%				28.00		0.00%
Garbancillo Zarco	Jalisco									0.00%
Azufrado	Sinaloa			0.00%				45.00	49.00	-8.16%
Mayocoba	Sinaloa			0.00%				29.00	31.00	
Peruano	Sinaloa	31.00	31.00	0.00%	33.00	32.00	3.13%	29.00	30.00	-3.33%
Small Chickpea	Sinaloa	27.00	30.00	-10.00%	27.00	30.00	-10.00%	31.00	32.50	-4.62%
Large Chickpea	Sinaloa	30.00	32.50	-7.69%	27.00	30.00	-10.00%	32.00	35.00	-8.57%

MONTH: J	uly 2025 vs. J	une 2025
	The second of the second of the second	

MONTHLY CENTRAL MARKET WHOLESALE AND SEMI-WHOLESALE REPORT product SINALOA ZACATECAS CHIHUAHUA PRODUCT origin price (\$/KG) price (\$/KG) VAR VAR price (\$/KG) VAR state / current current current 07 30 25 06 30 25 07 30 25 06 30 25 07 30 25 06 30 25 VARIETY country % % Imported Black Imported Jamapa Black Zacatecas 28.00 28.00 0.00% Nayarit Black Nayarit San Luis Black 24.00 27.00 -11.11% Zacatecas Veracruz Black Veracruz Imported Pintos Imported 28.00 28.00 0.00% 24.00 Pinto Saltillo 24.00 0.00% Zacatecas Pinto Saltillo Nayarit Pinto Saltillo Chihuahua 0.00% 27.00 24.00 12.50% Pinto Sattillo Durango Small Alubia Imported 28.00 21.00 33.33% 36.00 37.00 -2.70% Large Alubia Imported 22.00 22.00 0.00% Flor de Junio Zacatecas 0.00% Flor de Mayo 24.00 24.00 0.00% 37.00 37.00 0.00% Bayo Berrendo 34.00 Jalisco 34.00 0.00% Bayo 27.00 Zacatecas 26.00 29.00 -10.34% 32.00 -15.63% Garbancillo Zacatecas 0.00% 0.00% Canario Sinaloa Cacahuate Bola 0.00% 0.00% Jalisco Garbancillo Zarco Jalisco 0.00% 0.00% Azufrado Sinaloa 32.00 32.00 0.00% Mayocoba Sinaloa 29.00 29.00 0.00% Peruano Sinaloa 29.00 29.00 0.00% 32.00 30.00 6.67% Small Chickpea Sinaloa 28.00 30.00 -6.67% Large Chickpea Sinaloa 25.00 24.00 4.17% 30.00 30.00 36.00 36.00 0.00%



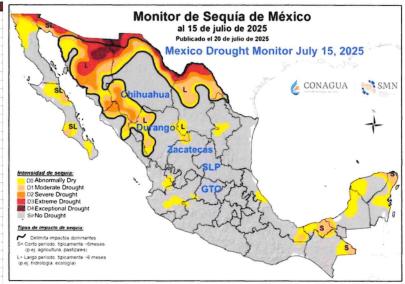
		MONTH	ILY CENTRAL		July 2025 ve		HOLESALE	REPORT		
PRODUCT	product origin	product NAYARIT		YUCATAN price (\$/KG)		VAR		RANGO \$/KG)	VAR	
VARIETY	state / country	current 07 30 25	past 06 30 25	%	current 07 30 25	past 06 30 25	%	current 07 30 25	past 06 30 25	%
Imported Black	Imported									70
Jamapa Black	Zacatecas									
Nayarit Black	Nayarit	n/a	37.00							
San Luis Black	Zacatecas				28.00	30.00	-6.67%	35.00	35.00	
Veracruz Black	Veracruz									
Chiapas Black	Chiapas									
Imported Pintos	Imported						-			
Pinto Saltillo	Zacatecas	n/a	32.50		30.00					
Pinto Saltillo	Nayarit	n/a	35.00							
Pinto Saltillo	Chihuahua									
Pinto Saltillo	Durango							28.00	28.00	0.00%
Small Alubia	Imported				35.00	35.00	0.00%			
Large Alubia	Imported	n/a	58.00							
Flor de Junio	Zacatecas	n/a	47.00							
Flor de Mayo	Zacatecas	n/a	51.00		45.00	45.00	0.00%	32.00	32.00	0.00%
Bayo Berrendo	Jalisco	n/a	37.00							
Bayo	Zacatecas	n/a	49.00		40.00	40.00		32.00	35.00	-8.57%
Garbancillo	Zacatecas	n/a	59.00							
Canario	Sinaloa						AUUI DA			
Garbancillo Zarco	Jalisco									
Azufrado	Sinaloa	n/a	53.00							-
Mayocoba	Sinaloa	n/a	47.00							
Peruano	Nayarit	n/a	41.00		44.00	44.00	***	40.00	40.00	0.00%

-Weather

CONAGUA's Mexico Drought Monitor July 15th: In the first half of July 2025, above-average rainfall was observed in the northwest, north, north Pacific, central and southern regions of Mexico, mainly due to the influence of Hurricane Flossie, which continued to move close to the Mexican Pacific coast during the first days of the month, the entry of moisture from both oceans, the presence of low-pressure channels and the passage of 5 tropical waves (8 to 12) over the national territory. These precipitations helped to reduce areas with moderate to exceptional drought (D1 to D4) in the states of Sonora, **Chihuahua**, Coahuila, Sinaloa and **Durango**. As of July 15, 2025, the percentage of areas with moderate to exceptional drought (D1 to D4) at the national level was 17.7%, 4.1% lower than that recorded at the end of June 2025.

According to this report, until July 15th, the bean states of **San Luis Potosi, Guanajuato and Zacatecas, are practically drought-free**. Durango was still experiencing drought in 43% of its territory and Chihuahua in 50% of its territory.

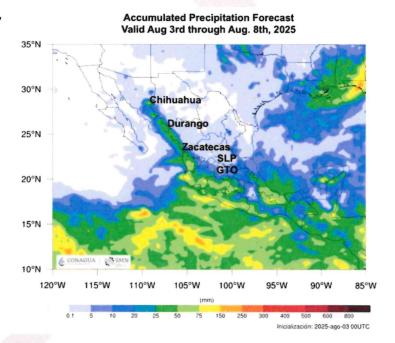
States		Suffering	Drought 2025	Until J	uly 15,	
Entidades Federativas	Drought Free Area	DO	D1	D2	03	D4
Aguascalientes	100.0	0.0	0.0	0.0	0.0	0.0
Baja California	55.4	28.2	6.5	5.4	3.7	0.8
Baja California Sur	55.8	35.7	8.5	0,0	0.0	0.0
Campeche	68.9	27.4	3.7	0.0	0.0	0.0
Coahuila de Zaragoza	46.9	14.8	21.2	7.1	8.5	1.5
Colima	100.0	0.0	0.0	0.0	0.0	0.0
Chiapas	78.6	13.5	7.9	0.0	0.0	0.0
Chihuahua	50.7	13.5	12.5	11.1	7.3	4.9
Ciudad de México	100.0	0.0	0.0	0.0	0.0	0.0
Durango	66.7	23.3	10.0	0.0	0.0	0.0
Guanajuato	98.3	1.7	0.0	0.0	0.0	0.0
Guerrero	100.0	0.0	0.0	0.0	0.0	0.0
Hidalgo	100.0	0.0	0.0	0.0	0.0	0.0
Jalisco	85.0	15.0	0.0	0.0	0.0	0.0
Estado de México	100.0	0.0	0.0	0.0	0.0	0.0
Michoacán de Ocampo	97.1	2.9	0.0	0.0	0.0	0.0
Morelos	100.0	0.0	0.0	0.0	0.0	0.0
Nayarit	86.1	13.9	0.0	0.0	0.0	0.0
Nuevo León	84.0	13.3	2.7	0.0	0.0	0.0
Oaxaca	98.9	1.0	0.1	0.0	0.0	0.0
Puebla	99.3	0.7	0.0	0.0	0.0	0.0
Querétaro de Arteaga	100.0	0.0	0.0	0.0	0.0	0.0
Quintana Roo	55.0	30,9	14.1	0.0	0.0	0.0
San Luis Potosí	100.0	0.0	0.0	0.0	0.0	0.0
Sinaloa	60.5	22.9	8.0	8.6	0.0	0.0
Sonora	10.2	18.4	19.6	22.5	20.5	8.8
Tabasco	30.5	30.0	39.5	0.0	0.0	0.0
Tamaulipas	98.0	1.1	0.9	0.0	0.0	0.0
Tlaxcala	100.0	0.0	0.0	0.0	0.0	0.0
Veracruz	81.9	14.5	3.6	0.0	0.0	0.0
Yucatán	58.4	38.0	3.6	0.0	0.0	0.0
Zacatecas	97.2	2.7	0.1	0.0	0.0	0.0



CONAGUA's Rain Forecast Summary of the 72-to-96-hour forecast Summary of the 72-to-96-hour forecast (Tuesday, Aug 5th to Thursday, Aug 9th, 2025)

On Tuesday Aug 5th, the new Tropical Wave No. 20, will move over the Yucatan Peninsula and southeastern Mexico, and will be associated with a low-pressure area with probability of cyclonic development south of the coasts of Chiapas, causing heavy to very heavy rains in these regions,

forecasting heavy rains in Oaxaca, Chiapas, Tabasco and Veracruz.



During the forecast period, the **Mexican monsoon** will generate showers and intervals of showers in the northwest of Mexico. Likewise, the hot to very hot weather will continue over northern Mexico, the Pacific coast, the Gulf of Mexico coast and the Yucatan Peninsula, while the heat wave will persist in areas of Baja California, Baja California Sur, Sonora and Sinaloa.



Trade Policy

TARIFFS. August 1st update

-After announcing on July 12th, the implementation of tariffs as part of Fentanyl Sanctions. On July 30th, President Trump paused for 90 days, the 30% Tariffs to Mexican imports on that were scheduled to start on August 1st

- -Steel, Aluminum, Beer, Beer Cans and Cars made in Mexico, On June 3rd, President Trump announced the increase of these tariffs to 50%, -up from 25% last month, effective first minute of June 4th. This was a disappointing surprise for the Mexican Secretary of Economy Marcelo Ebrard, who had announced hours earlier, underway negotiations to reduce it to 5%. President Sheinbaum stated that tariffs are unfair and that Mexico will consider taking measures. Sec. Ebrard is traveling to Washington June 6th, to conduct different meetings with US counterpart, this tariff is adding to his urgent matters' agenda.
- **-USMCA Renegotiation**, originally scheduled to start on April 2026, has been re-scheduled to begin next September, a change that is perceived as positive, as it could help to provide certainty to the different industries and sectors of the economy
- -Mexican Tomatoes receiving 20.91% tariff starting July 14, 2025, ending a bilateral agreement signed in 2019, due to dumping prices, unfair for US tomato producers. The Mexican government consider these as unfair, but is not announcing retaliation
- -Mexico-Texas Water 1944 Treaty: Mexico started supplying water to Texas in the third week of April, after President Trump threatened to impose tariffs if Mexico continued to fail complying with this treaty.

On the morning of April 3rd, Mexican President Claudia Sheinbaum stated that there will not be any retaliatory tariffs or measures from Mexico, and that she is happy that Mexico received preferential treatment with no blanket tariffs. Secretary of Commerce Marcelo Ebrard confirmed that, according to that document, Mexican exports to the United States that comply with the USMCA rules, are exempt, zero tariff, including food and agriculture, automotive parts, etc. -According to that document, Mexican exports to the United States that comply with the USMCA rules, are exempt, zero tariff, including food and agriculture, automotive parts, etc. -Tariffs for other merchandises that are exported to the USA and are not currently complying with USMCA rules, will be subjected to 25% tariff, however, in the case of Mexico, if there continues to be progress in stopping immigration and drug trafficking, these tariffs could be



reduced to 12%.

- -He said they have an aggressive plant to achieve that in the next 40 days. These products include automotive parts, aluminum and steel. Secretary Ebrard announced that Mexican exporters of non-complying products and the government, are actively working on complying with the rules of origin to achieve compliance with the USMCA to reach zero-tariffs -Ten energy products that are not complying with the USMCA rules of origin, will be subjected to 10% tariff
- MRL'S Prohibition update: On March 31st, President Claudia Sheinbaum announced that her administration is working on a new decree, soon to be announced, to ban the use of many pesticides in Mexican agriculture, including DDT and other that are banned in many countries but not in Mexico.
- -GMO CORN update: On Monday March 17th, the Mexican Government published in the Official Gazette, the Constitutional law, banning GMO corn from being planted in Mexico. This could potentially evolve again, into a trade dispute in the future. GMO Corn and Glyphosate import restrictions were lifted on February 5th, in compliance with the USMCA controversy decision in favor of the USA, reversing the former MX President AMLO's 2023 decree to ban both products. The Mexican government however, is working in a Constitutional decree to fully ban the cultivation in Mexico, of non-natural genetic modifications in corn, however, the Mexican Congress will fight to completely ban the cultivation any form and kind of GMO corn in Mexico, to protect the Mexican original heirloom corn varieties

Mexico Economic Report - July 2025

By Mercalimentos with info from: BANXICO, INEGI, SAT, oilbmex, PEMEX

Mexico's Main Economic Indicators	Information Available August 1, 2025
Population - 2020 NEW CENSUS (INEGI) last update 2021	126.014 million
National GDP Growth Annual (est. 2024)	1.2%, down from 3.2 % in 2023
Average Exchange Rate Avg. July 2025	MX\$18.69 / MX\$19.05 June / MX\$20.44 May / USD. MX\$20.09 in Apr
Unemployment Rate June 2025	2.69%,
Inflation Rate Y/accu to June 2025 est.	4.25%, up from 3.77% in March
Mexican Crude Oil Price July 1, 2025	US\$66.54 per barrell - US\$74.80 in March 2024
International Reserves July 25, 2025	US\$242.34 billion
Trade Balance Imports-Exports Y2024 USA-MX	US\$839.9 billion both ways

-After announcing on July 12th, the implementation of 30% tariffs to all Mexican origin products as part of Fentanyl Sanctions. President Trump paused for 90 days the 30% Tariffs to Mexican imports on that were scheduled to start on August 1st, after speaking with Mexican President Claudia Sheinbaum on July 31st, just hours before the deadline. Dr. Sheinbaum reported that the call was very productive and in a very respectful environment. -President Trump emphasized that Mexico must continue collaborating to stop fentanyl, drug



cartels and migrants, and stressed that (in terms of negotiations) Mexico sets apart from other countries-markets, due to the deep integration with the United States.

- -Specialists consider that this could be the last time Mexico has to negotiate to stop tariffs, towards the renegotiation of the USMCA, scheduled to begin in September 2025, highlighting that as of today, Mexico would be the only country in the world having a Free Trade Agreement with the United States, with most products subject to zero-tariff.
- -The tariffs that remain in place: **Steel, Aluminum, Beer, Beer Cans and Cars made in Mexico**, On June 3rd, President Trump announced the increase of these tariffs to 50%, -up from 25% last month, effective first minute of June 4th. **Mexican Tomatoes** receiving 20.91% tariff since July 14, 2025
- -INEGI reported that Mexico grew +0.7% in Q2 and 1.2% Y/Y, signaling that no recession is at the door, for now, good news for a year full of uncertainty for Mexico and with geopolitical challenges and financial volatility in the world.
- -The Mexican Central Bank continues to expect a growth between 1.5% and 2.3% for 2025, however, economic analysts consider that Mexico will grow only 0.2% this year, as challenges and uncertainty on the USMCA continue to mount
- -Agriculture and livestock, top three sectors for the Mexican GDP, decreased -1.3% in Q2, mainly due to the suspension of Mexican Cattle exports to the USA amid the Screwworm epidemic, and the Mexican Tomato tariffs
- -Foreign remittances coming from Mexicans working abroad, top 5 in the Mexican economy, reduced -16.2% annual in June, the largest reduction ever recorded, affecting consumption in several states across Mexico
- -Mexican Consumer Confidence Index registered an annual decrease of -1.2 units in July, accumulating 7 consecutive moths down, with consumers expressing that they feel that the economy is not doing well now compared to a year ago, and will not improve in the next 12 month
- -Exchange rate according to MONEX: the Mexican peso has recovered ground and was positioned in 11th place among the currencies of emerging countries that presented the greatest gains against the dollar.

Also, according to analysts, the recent 90-day pause of the tariffs helped the Mexican Currency to strengthen, however, in general, it has remained remarkably strong in the last month. Average exchange rate in July was MX\$18.69 / USD, down from MX\$19.05 / USD in June and MX\$20.44 / USD in May 2025



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.

Nayarit Will Have Improved Bean Seed Meganoticias July 31, 2025

In the frame of the Bean Self-Sufficiency Plan, the Mexican Government is considering Nayarit as one of the key states to produce and distribute improved bean seed, as part of a national strategy to strengthen bean production and reduce dependence on imports.

The Ministry of Agriculture and Rural Development (SADER) informed that, through the recently created PROSEBIEN, the National Seed Producer company, where 4,500 MT of improved seed were produced this cycle, of which 530 MT were already delivered as of July 30 in Zacatecas and Durango; seeking to benefit more than 4,300 small producers, who will plant on 21,000 hectares.

For Nayarit, the distribution of this seed is scheduled for the Fall-Winter 2025 agricultural cycle, with the purpose of offering high quality genetic inputs at affordable prices; this measure seeks to boost yields, guarantee food sovereignty and raise the quality of the beans produced in the state.

Among the varieties to be distributed is "Negro San Luis" black beans, developed by the National Institute of Forestry, Agriculture and Livestock Research (INIFAP), soon to be registered in the National Catalog of Plant Varieties under the name San Luis 22. This variety is resistant to diseases such as common blight, rust, anthracnose and common bean mosaic, and is ideal for rainfed crops in the Altiplano and El Bajío regions.

The creation of PROSEBIEN aims to achieve a national production of 1.1 million MT of beans by 2030, by strengthening farmer production in key states such as Zacatecas, Durango, Nayarit, San Luis Potosí, Chiapas, Veracruz, Guerrero and Puebla.

August rains will be decisive for planning the next agricultural cycle in Sinaloa: CNA Linea Directa August 1, 2025

August rains are forecast to be above the historical average, predicted Jesús Antonio Cruz Varela, general director of the National Water Commission's North Pacific Basin Agency.

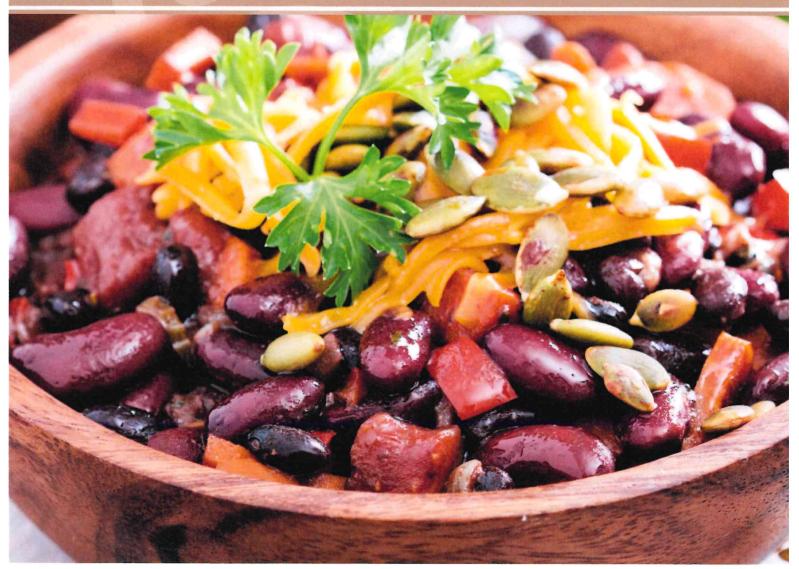
Culiacán, Sinaloa. The forecast of abundant rains for Sinaloa remains very favorable during the month of August, which will be above the historical average, predicted Jesus Antonio Cruz Varela, general director of the North Pacific Basin Agency of the National Water Commission (Conagua). He considered that this is a good incentive for agricultural producers to also have a traceability, not certain, but predicted that they will have good runoff to the dams, and thus be able to have sufficient volumes for the next 2025-2026 cycle.

In an interview during the first broadcast of the news program Línea Directa, the federal official recommended farmers to continue taking the water care measures, that is to say, the most appropriate ones that gave them results in the previous planting to continue conserving the levels in the dams for future cycles.



USDBC Mexico Report

2025 Mexico App & Social Media July



US Dry Bean Council Representation Office Mexico City Mercalimentos Consultores SC

info@mercalimentos.com

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Latest plublished News

18/07/25	Why Beans Are the Ultimate Future- Proof Ingredient	
16/06/25	The Sustainability of U.S. Beans	
15/05/25	Beans contain the nutrients and benefits found in both vegetable and non-meat protean sources.	
15/04/25	Prospective Plantings 2025 - Dry Edible Pea Area Planted	Cry Editor State Parkete - Shirter and States Sherri 201-160 Transaction on the parkete - Shirter and States Sherri 201-160 Transaction on the parkete - Shirter and States Sherri 201-160 Transaction on the parkete - Shirter and States - Shirter and Shi
14/03/25	The Use of Bean Flour: Quality and Nutritional Contribution	
21/02/25	Nutrition Journal Publishes Critical Study on Beans, Pulses and Health	Eating beans and chickpeas is good, eating mere is even better. The state of the s
17/01/25	The New Uses of Beans in the Global Food Service Segment	



iTunes Store

July 1st - 30th App

Impressions on iTunnes: 3,910

Downloads: 18

IMPRESIONES ?

3,91 mil +23 %

DESCARGAS TOTALES ?

18 +13 %

App Life Time Results

App Impressions iTunnes: 15,900

Downloads: 423

IMPRESIONES ?

15,9 mil o%





Top Countries

United States: 14

Canada: 2 Argentina: 1 Denmark: 1

Descargas totales por territorio >	Ver todo
Estados Unidos	14
Canadá	2
Argentina	1
Dinamarca	1

Top Countries

United States: 238

Mexico: 59 Colombia: 10 Costa Rica: 10 South Korea: 10

Descargas totales por territorio ∨Ver todoEstados Unidos238México59Colombia10Costa Rica10República de Corea10



Play Store

July 1st - 27th

Store listing visitors: 7

Downloads: 5

Store listing visitors ?

7

+40% ▲ vs. previous period

Store listing acquisitions ②

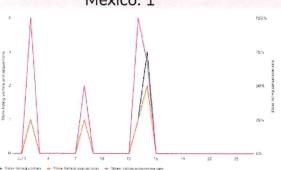
5

+66.67% - vs. previous period

Top Countries

United States: 3

India: 1 Mexico: 1



Top Countries

United States: 25

Mexico: 29

Countries / regions ②	
Country / region	Store listing acquisitions
United States	3
India	1
Mexico	1

All Time

Store listing visitors: 123

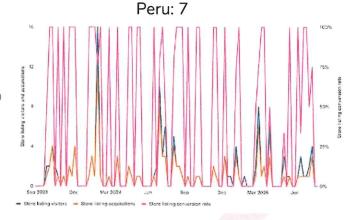
Downloads: 95

Store listing visitors ?

135

Store listing acquisitions ?

103



Argentina: 7 El Salvador: 5

Countries / regions ②

	Store listing
Country / region	acquisitions
Mexico	29
United States	25
Argentina	7
Peru	7
El Salvador	5

Total Results (Android & IOS)

July 2025 - Installs: 23

Total all time - Installs: 526



This month, the app users had an increase of 23 new users on both platforms; 18 of them were on iOS, twice as much as last month.

This month, we reached 526 total users of this new version of the app.

This month we continue with the normal app updates, uploading the latest bean market news, published by the USDA (https://my- marketnews.ams.usda.gov/filerepo/reports) as well as the news and other content from different resources. These news are published on the app in English, Spanish and Portuguese.

We also sent emails inviting importers from Latin America to download the app. 1,972 emails were sent in Spanish to Latin-American importers, with at least 579 confirmed openers.

Email promoting the USDBC app:



stimados amigos,

Los invitamos a descargar la App del Consejo Americano del Frijol que se encuentra disponible en las tiendas l'Tunes, y Play Sotre para l'Phone y Androld. En la ella tendrán acceso al directoro de exportadores de frijoles de Eb. UU., a las ultimas noticias de la industria procios del marcado, próximos eventos, solicitar cotizaciones y macho más.

Tenemos un sitio web con más información y tutoriales sobre la aplicación. Visite http://trip/

Para descargar la aplicación, solo tienes que escanear el codigo QR de la plataforma que te interesa. En caso de que no puedas escanear los códigos QR, siempre puedes descargarta desde los siguientes enlaces:

Tunes | Google Play Store



Si tiene alguna duda o pregunta, no dude en ponerse en contacto conmigo por correo electrónico en victor@mercatimentos net

Victor Leal victor@mercalimentos.net Smart Phone Application Team





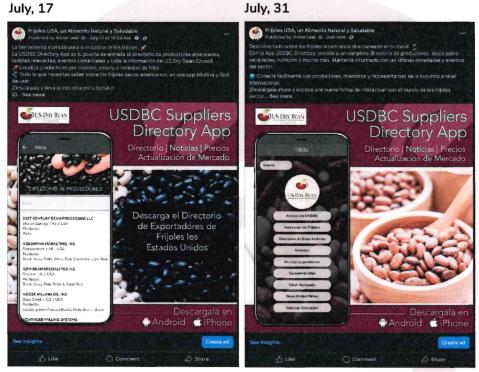
App updates

As we reported last month, the Google platform is asking to update the API version of the app, giving us a deadline of August 30th. We are already have the built ready; next week we will push the update.

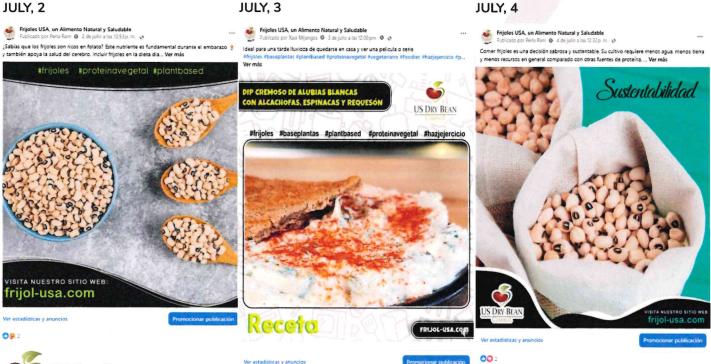


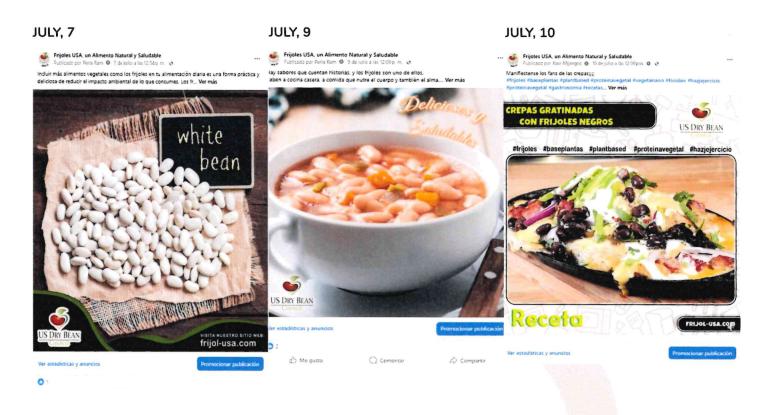
App social media promotion

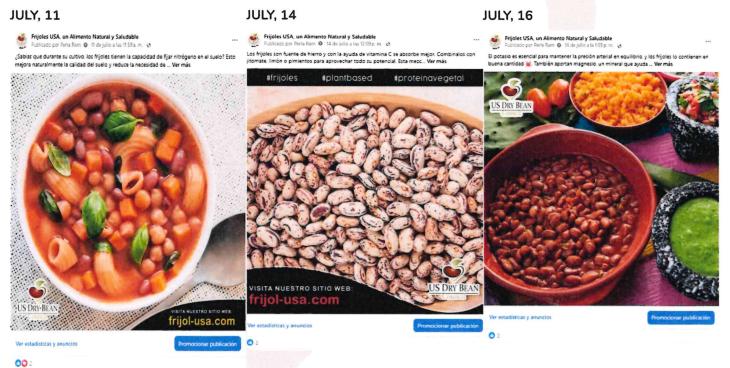
On July, we continue promoting the app on social media through a couple of posts on Facebook.



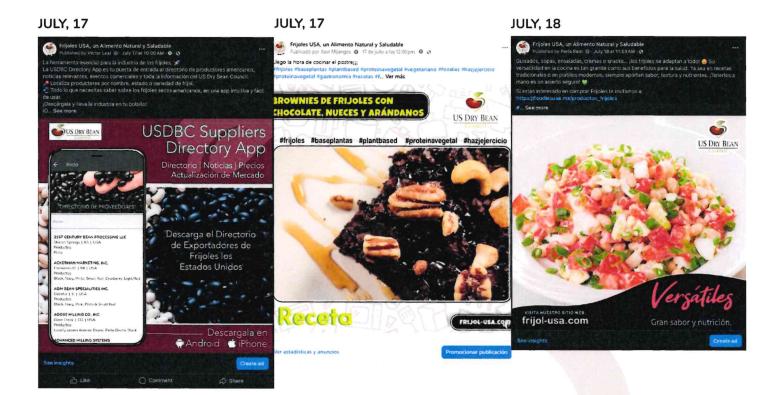
Frijol USA Facebook Posts - July 19 Facebook posts





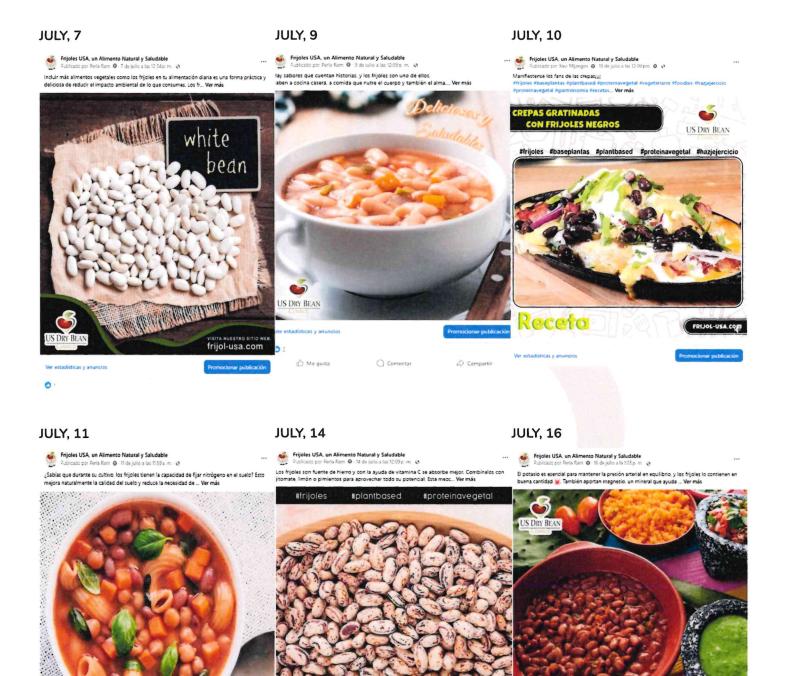










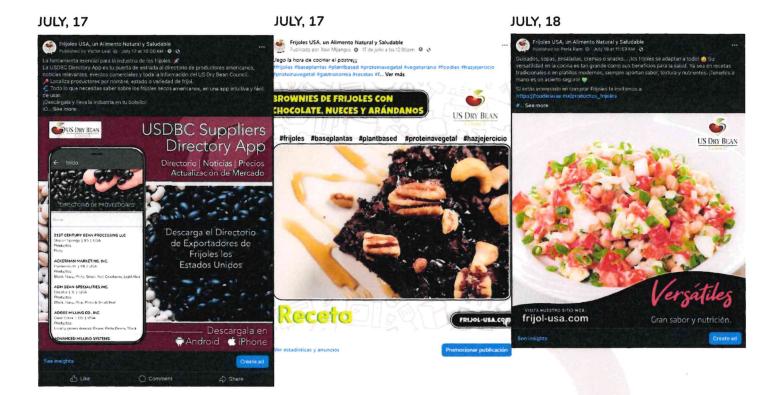




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JULY, 24

JULY, 23



JULY. 21



JULY, 31



