

USDBC MEXICO REPORT

2025 Mexico Crop and Market Update
June 30 2025



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US DRY BEAN
Council

In market rep



USDBC June 2025 Mexico Monthly Report

2025 Spring-Summer Beans – July 4th Update

-Reportedly, soils in Zacatecas and Durango have a preparation progress of over 70%. They took advantage of the showers received in June, thanks to the different systems that have brought a good amount of rain to central Mexico, with an important reduction of drought in the bean states, in comparison with two weeks ago and a big improvement compared with the previous year. Producers are prepared to plant as much as possible, in the next 4 to 6 weeks, even into August, as it has happened in the past.

-No planting intention published however, total planting this year can be calculated around 1 million hectares, similar to last year's. Zacatecas is reportedly expected to plant 600 thousand hectares: Durango 200 thousand hectares, and Chihuahua is hoping to complete over 100 thousand hectares, excited for the amount of rain that has helped to slightly recover moisture in some areas.

- Small bean producers in Zacatecas, Durango and Chihuahua, started receiving 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.

-Pinto Bean prices in Chihuahua for the 2024 volumes available are MX\$22,000 / US\$1,100 per MT, way under the price guarantee of MX\$27,000 / US\$1,350 per MT. In Zacatecas and Durango pinto prices are as low as MX\$17 thousand / US\$850 per MT. Black bean prices for the 2024 volumes available in Zacatecas, are as low as MX\$16 thousand / US\$800 per MT. Irrigated beans in Zacatecas, Durango and Chihuahua, that account for around 10% have been planted according to SIAP's latest report below, and should be ready to be traded in August

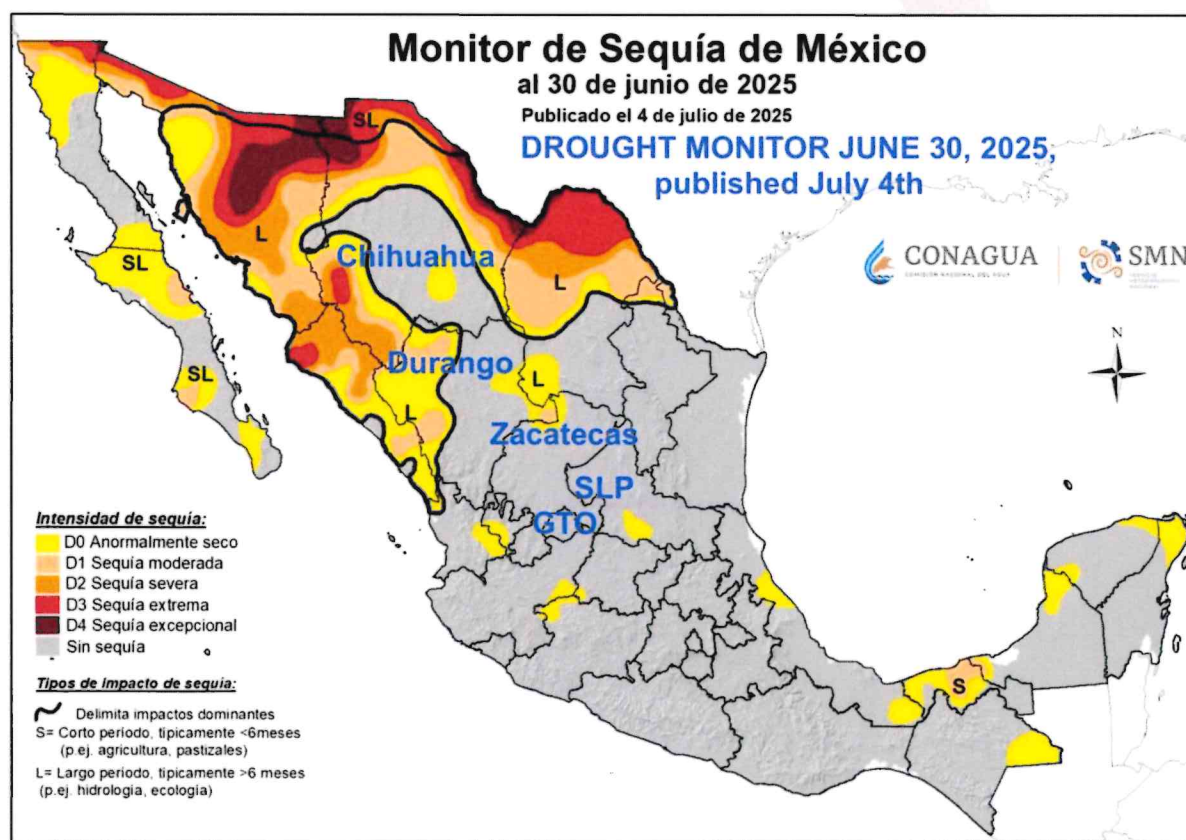
-SIAP's preliminary progress report until the end of May, shows that 157,099 hectares had been planted.

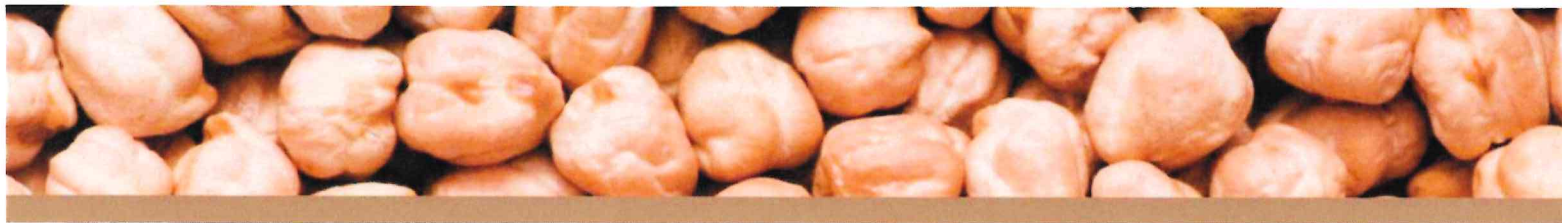
GOVERNMENT'S OFFICIAL 2025 SPRING - SUMMER CYCLE MEXICO DRY BEANS PLANTING SEASON								
IRRIGATED + DRYLAND SITUATION UNTIL May 30, 2025								
SURFACE - HECTARES				PRODUCTION - MT		YIELD KG/HA		
STATE	Government's Planting Intention / NOT AVAILABLE	Planted hectares according to Government	Harvested according to government	Damaged according to government	Government Expectation / NOT AVAILABLE	Obtained according to Government	Expected by Government / NOT AVAILABLE	Obtained according to Government
CHIAPAS		17,152.46	0	0				
CHIHUAHUA		2,147.50	0	0				
DURANGO		19	0	0				
GUANAJUATO		8,470.00	0	0				
GUERRERO		491	0	0				
MEXICO		737.16	0	0				
MICHOACAN		470.53	0	0				
OAXACA		4,978.05	0	0				
PUEBLA		26,838.35	0	0				
QUERETARO		1,318.60	0	0				
SAN LUIS POTOSI		5,455.00	0	0				
ZACATECAS		77,822.30	0	0				
OTHER		11,099	0	0				
TOTAL		157,099.80	0	0				



-Weather. During the second half of June 2025, above-average rainfall was recorded in a large part of Mexico, particularly in the northern, northern Pacific, western, central, eastern, southern, southeastern and southeastern regions. This was due to the occurrence of various meteorological systems, such as Tropical Storm Dalia and Hurricane Flossie, which moved close to the Mexican Pacific coast; as well as the entry of Hurricane Erick on the coast of Oaxaca and tropical storm Barry in the north of Veracruz, in addition to low pressure channels and the passage of four tropical waves (No. 4 to 7). This led to a reduction in areas with moderate to exceptional drought (D1 to D4) in southern Sonora, Chihuahua, Sinaloa and Durango. Similarly, there was a reduction in areas with abnormally dry conditions (D0) and moderate drought (D1) in the west, center, east and southeast of the country.

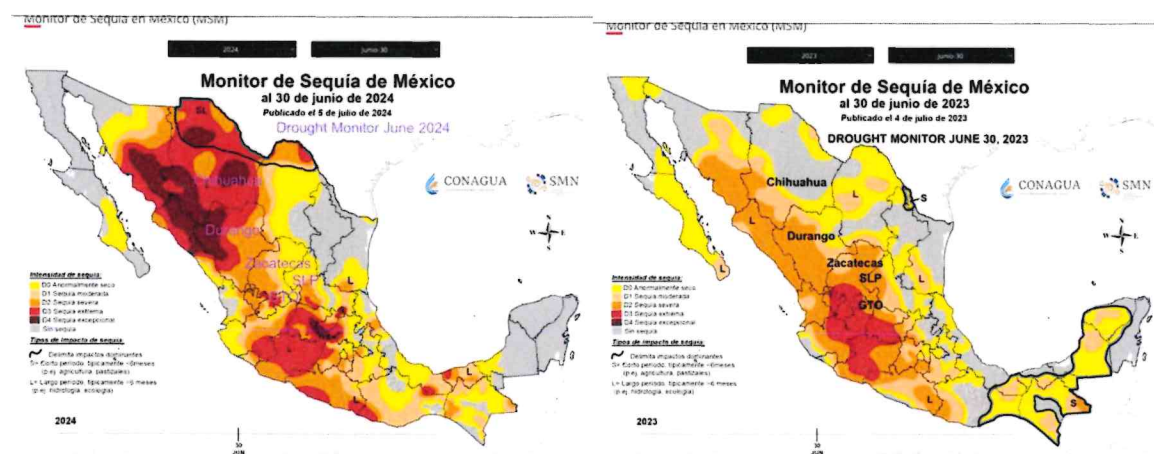
On the other hand, below-average precipitation was observed in northwestern and northern regions, which caused the persistence of areas with moderate to exceptional drought (D1 to D4) in those regions. As of June 30, 2025, the percentage of areas with moderate to exceptional drought (D1 to D4) at the national level was 21.8%, 15.7% lower than that recorded at the end of the previous fortnight.





DROUGHT MONITOR JUNE 30, 2024

DROUGHT MONITOR JUNE 30, 2023



The latest Mexico Drought Monitor June 30th, shows that:

- Zacatecas, is now drought-free in 95.4% of its territory, recovering from 100% drought in May 15th, and 55.3% drought in May 31.
- Durango reduced drought, but still suffering drought in 42% of its territory
- Chihuahua still suffering drought in 65% of its territory
- Guanajuato reduced drought -free in 97.5% of its territory
- San Luis Potosi is now drought-free in 94.5% of its territory

CONAGUA's Rain Forecast Summary of the 72-to-96-hour forecast (Monday, July 07 to Wednesday, July 09, 2025)

During the forecast period: The Mexican monsoon will prevail in the northwest of the country, will maintain the probability of heavy to very heavy rains accompanied with thundershowers and possible hail in Sonora, Chihuahua and Durango, in addition to showers in Baja California Sur, forecasting heavy showers on Wednesday in Sinaloa.

Low pressure channels over the Sierra Madre Occidental, a cyclonic circulation in height that will move over the northeast and north of Mexico, divergence and the entrance of humidity from the Pacific Ocean and Gulf of Mexico, will cause showers and strong to very strong rains accompanied with electric discharges and possible hail in the north, northeast, east, center and west of the national territory, forecasting heavy rains on Wednesday in areas of Nayarit and Jalisco. Tropical wave No. 9 will move over the south and west of Mexico, while a new tropical wave will cross the Yucatan Peninsula and the southeast of the country. The interaction of both systems will cause the probability of heavy to very heavy rains in the aforementioned regions, with heavy rains expected on Monday in Chiapas. The low-pressure area with probability of cyclonic development will move westward, away from national coasts and without affecting the Mexican territory.

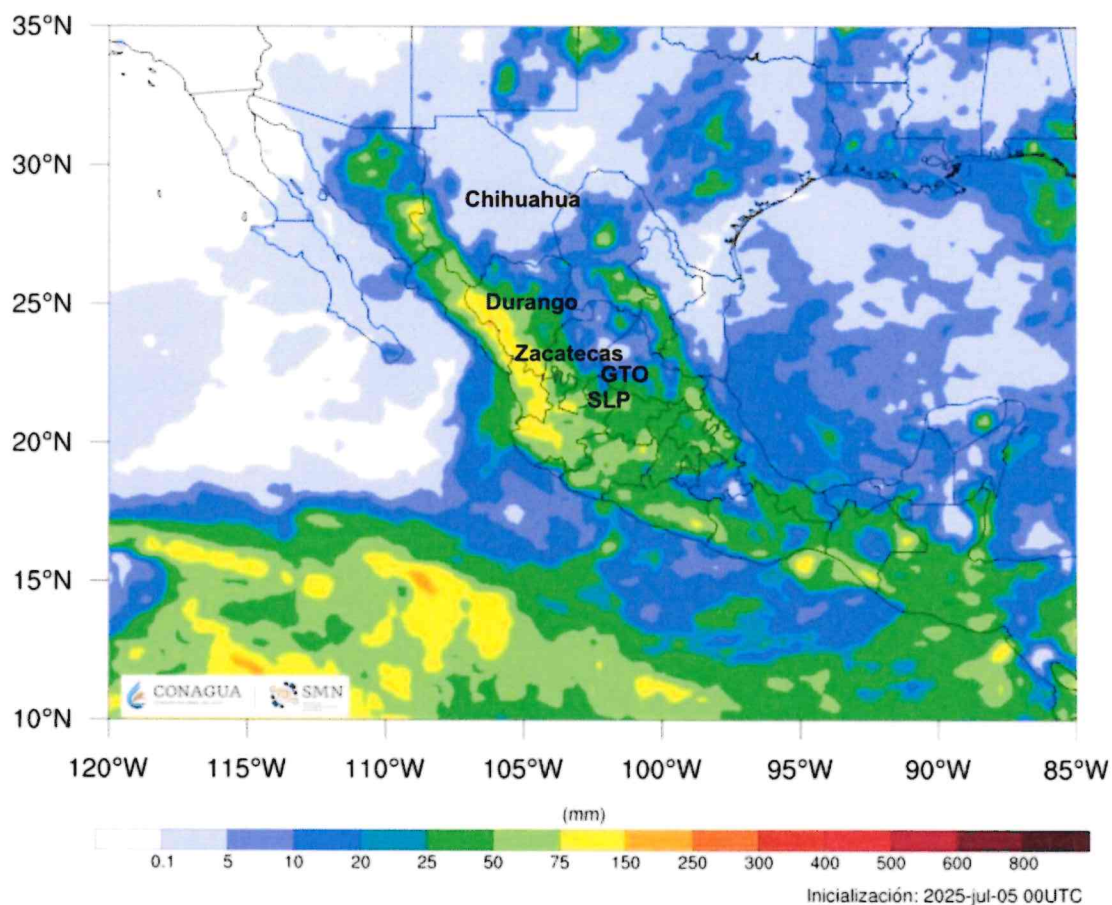


STATE	Area % suffering drought until June 30, 2025					
	Drought-free %	D0	D1	D2	D3	D4
Aguascalientes	100.0	0.0	0.0	0.0	0.0	0.0
Baja California	46.4	37.2	6.5	5.4	3.7	0.8
Baja California Sur	42.5	49.0	8.5	0.0	0.0	0.0
Campeche	86.8	11.5	1.7	0.0	0.0	0.0
Coahuila de Zaragoza	30.8	13.6	23.3	10.9	19.6	1.8
Colima	100.0	0.0	0.0	0.0	0.0	0.0
Chiapas	87.2	12.8	0.0	0.0	0.0	0.0
Chihuahua	35.0	19.2	16.2	12.9	9.7	7.0
Ciudad de México	100.0	0.0	0.0	0.0	0.0	0.0
Durango	57.6	30.1	12.3	0.0	0.0	0.0
Guanajuato	97.5	2.5	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	93.8	6.2	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	95.4	4.6	0.0	0.0	0.0	0.0
Morelos	100.0	0.0	0.0	0.0	0.0	0.0
Nayarit	81.2	18.8	0.0	0.0	0.0	0.0
Nuevo León	93.3	2.4	4.3	0.0	0.0	0.0
Oaxaca	100.0	0.0	0.0	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	85.3	14.7	0.0	0.0	0.0	0.0
San Luis Potosí	94.5	5.5	0.0	0.0	0.0	0.0
Sinaloa	6.4	36.4	18.7	32.2	6.3	0.0
Sonora	1.8	13.3	24.1	27.0	18.1	15.7
Tabasco	40.2	37.3	22.5	0.0	0.0	0.0
Tamaulipas	97.7	0.6	1.7	0.0	0.0	0.0
Tlaxcala	100.0	0.0	0.0	0.0	0.0	0.0
Veracruz	87.5	12.5	0.0	0.0	0.0	0.0
Yucatán	88.5	11.5	0.0	0.0	0.0	0.0
Zacatecas	95.4	4.5	0.1	0.0	0.0	0.0

Source: CONAGUA



ACCUMULATED PRECIPITATION FORECAST VALID FROM JULY 05 TO JULY 10, 2025



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 Winter+ Spring-Summer May 30, 2025 Update				
	Intention	Planted has.	Harvested	Yield kg	Production MT
Zacatecas	PENDING	77,822	-		-
Durango		19	-		-
Chihuahua		2,148	-		-
Chiapas		17,152	-		-
San Luis Potosi		5,455	-		-
Guanajuato		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	101,900	146,260	66,861	728	48,714
Total	255,528	431,730	206,102	1,270	262,363

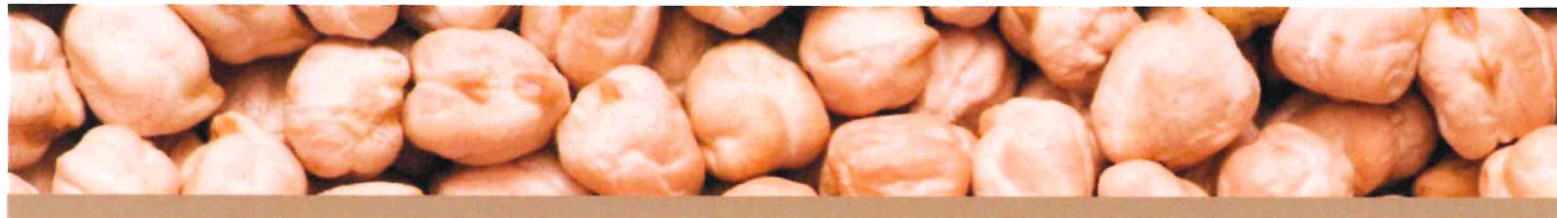
Source: Prepared by Mercalimentos with Mexican Department of Ag (SADER)
Ag. Information agency (SIAP)

MX DRY BEANS HISTORIC - AGRICULTURAL YEAR TWO CYCLES - SEPTEMBER TO AUGUST NEXT YEAR									
METRIC TONS - GOVERNMENT NUMBERS									
	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 – JUNE 30th Update

- 2025 chickpea production in Sinaloa continues to be expected 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 until March, exports reached 131,940 (commercial year is June to May)
- Top 5 export markets for MX garbanzos in this period: Turkey 53,268 MT / US\$85.6 million; Spain 15,175 MT/ US\$19.5 million; Algeria 7,472 MT / US\$13.8 million; USA 8,504 MT / US\$12.7 million; UAE 6,628 MT / US\$9.85 million



Mexico National - 5 Y Garbanzo-Chickpea Planting-Harvesting -Production Hectares - MT FALL-WINTER CROP					
According to Government	2021	2022	2023	2024	2025 *In APRIL 2025
Government's Planting Intention - hectares	88,471	96,349	114,830	86,874	92,771
Planted Government - hectares	87,493	104,978	66,513	122,186	118,207
Harvested Government - hectares	87,493	104,978	66,484	121,814	*39,182
Own Est. w/local trade assoc and government					
Production - MT	165,372	178,423	130,418	260,514	71,767
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	225,080
Exports- customs *June to May every year MT	140,524	156,419	128,428	136,593	131,940
Apparent carryover MT	127,203	119,207	91,197	177,313	*93,140
Average Price Paid to Producer per MT	US\$1,166	US\$1,050	US\$1,444	US\$944	US\$1,000

* Blue numbers are Est. / *Numbers until April 2025

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

MEXICAN GOVERNMENT'S OFFICIAL 2024/2025 FALL- WINTER MEXICO GARBANZO PRODUCTION PLANTING SEASON - Situation until April 30, 2025								
Surface - hectares				Production - MT		Yield kilos/has		
State	Government's Planting Intention	Planted hectares according to Government	Harvested according to government	Damaged according to government	Expected by Government	Obtained according to Government	Expected by Government	Obtained according to Government
Baja California Sur	1,500	1,500	106	-	2,970	200	1,980	1,890
Guerrero	4,568	4,318	3,143	-	9,300	6,058	2,040	1,930
Jalisco	223	223	-	-	456	-	2,090	0
Michoacan	9,925	9,871	3,059	-	19,101	4,385	1,920	1,430
Sinaloa	64,012	90,830	31,342	-	139,228	59,103	2,180	1,890
Sonora	11,510	10,326	433	-	27,938	828	2,430	1,910
Other states	1,033	1,139	1,098	-	1,388	1,194	1,343	874
TOTAL	92,771	118,207	39,182	-	200,381	71,767	2,160	1,830

Source: Sader Siap

Mexican Market Situation July 4th, Update

-Importers concerned about the potential black bean prices drop, with enough stocks of imported beans purchased at high prices

-Price lowering factors also 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, 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.

2022-2025 September to August - U.S. DRY BEANS to MEXICO - USDA COMMERCIAL YEAR IMPORTS according to Mexican data												
TARIFF CODE / DESCRIPTION	2022			2023			2024			2025 (Set2024-Mar2025)		
	MT	US\$	Market Share %	MT	US\$	Market Share %	MT	US\$	Market Share %	MT	US\$	Market Share %
Black, pinto, white and other beans	n/a	n/a		n/a	n/a		n/a	n/a		n/a	n/a	
0713.33.99	n/a	n/a		n/a	n/a		n/a	n/a		n/a	n/a	
	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	61,622	\$69,555,586	92%	145,773	\$171,509,346	84%	331,777	\$403,389,678	73%	164,830	\$176,667,455	76%

Prepared by: Mercalimentos with Mexican Customs data

USDA COMMERCIAL YEAR SEPTEMBER 2024 / AUGUST 2025
Mexico's Dry Bean Imports-All Origins

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	20,073	82%	19,623,349
May 2024	CANADA	2,554,580	2,554	10%	2,678,214
May 2024	BRAZIL	1,605,000	1,605	7%	1,420,900
May 2024	CHINA	0	0	0.0%	0
May 2024	ARGENTINA	250,000	250	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	4,805,060	4,805	17%	5,126,991
April 2025	ARGENTINA	0	-	0%	0
April 2025	CHINA	0	0	0%	0
April 2025	BRAZIL	500,000	500	2%	464,250
Subtotal		28,209,514	28,209	100%	28,887,328
March 2024	USA	20,816,663	20,816	84%	21,892,098
March 2025	CANADA	3,579,844	3,580	15%	3,855,884
March 2025	BRAZIL	250,000	250	1%	227,500
March 2025	CHINA	24,971	25	0%	74,766
Subtotal		24,671,478	24,671	100%	26,050,248
February 2025	USA	14,246,698	14,247	90%	15,021,206
February 2024	CANADA	1,482,388	1,482	9%	1,614,355
February 2024	ARGENTINA	0	-	0%	0
February 2024	CHINA	42,000	42	1%	81,552
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%	0
January 2025	CHINA	0	0	0%	0
January 2025	BRAZIL	500,000	500	3%	550,000
Subtotal		13,778,218	13,778	100%	14,615,473
December 2024	USA	8,076,579	8,077	91%	8,820,756
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	18,332,953	18,333	73%	20,231,283
November 2024	CANADA	2,864,135	2,864	11%	3,176,263
November 2024	ARGENTINA	3,078,260	3,078	12%	3,555,813
November 2024	BRAZIL	1,000,000	1,000	4%	1,170,000
Subtotal		25,275,348	25,275	100%	28,133,359
October 2024	USA	30,101,643	30,102	70%	33,718,114
October 2024	CANADA	4,909,328	4,909	11%	5,567,428
October 2024	ARGENTINA	7,555,050	7,555	18%	8,796,702
October 2024	BRAZIL	375,000	375	1%	454,750
Subtotal		42,941,021	42,941	100%	48,536,994
September 2024	USA	20,675,243	20,675	63%	23,982,958
September 2024	ARGENTINA	9,012,290	9,012	28%	10,909,336
September 2024	BRAZIL	1,847,600	1,848	6%	2,182,244
September 2024	CANADA	1,134,108	1,134	3%	1,403,299
Subtotal		32,669,241	32,669	100%	38,477,837

Prepared by: Mercalimentos with Mexican Customs data

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 June vs. May 2025: Steady in Mexico City, steady in Monterrey and a slight reduction of -3.13% in Guadalajara, average price remains at MX\$31.5 / US\$1.5 per kilo. In June, for third consecutive month, US black prices were 3% higher than MX blacks avg. price.
- US Pinto beans prices in June vs. May 2025, registered again reductions of -3.5% in Mexico City, -3.33% in Monterrey. Avg. price remained at MX\$31 / US\$1.55 per kilo. This month US pinto prices were +12% higher than average price of MX pintos MX\$26 / US\$1.3 per kilo
- U.S. Large and Small Alubias Prices in June vs. May 2025, large alubias registered a big increase of +21% in Monterrey, and a -19% reduction in Guadalajara. Prices stayed in the aarea of MX\$30 to MX\$40 per/ US\$1.50 to US\$2 per kilo, depending on size and market
- Peruanos, Mayocoba, Azufrados prices in June vs. May 2025, steady in MX City and Monterrey, from MS\$29 to MX\$35 - US\$1.45 to US\$1.7 per kilo. Azufrado prices as high as MX\$49 / US\$2.45 per kilo
- Mexican colored varieties: Bayos, Canario, Cacahuete, Flor de Mayo and Flor de Junio prices, June vs. May 2025 steady, prices still around MX\$32 / US\$1.60 per kilo. Bayo beans continue at very high prices of up to MX\$53 / US\$2.72 per kilo
- Mexican Small & Large Garbanzos prices in June vs. May 2025, large garbanzos in Mexico City, Monterrey and Guadalajara with ups and downs, avg. priceMX\$33 / US\$1.65 per kilo.

MONTH: June 2025 vs. May 2025										
MONTHLY CENTRAL MARKET WHOLESALE AND SEMI-WHOLESALE REPORT										
PRODUCT VARIETY	product origin state / country	MEXICO CITY price (\$/KG)		VAR %	MONTERREY price (\$/KG)		VAR %	GUADALAJARA price (\$/KG)		VAR %
		current 06 30 25	past 05 30 25		current 06 30 25	past 05 30 25		current 06 30 25	past 05 30 25	
Imported Black	Imported	30.00	30.00	0.00%	33.00	33.00	0.00%	31.00	32.00	-3.13%
Jamapa Black	Zacatecas							31.00	31.00	0.00%
Nayarit Black	Nayarit	26.00	26.00	0.00%				34.00	34.00	0.00%
San Luis Black	Zacatecas	34.00	32.00	6.25%				36.00	36.00	0.00%
Veracruz Black	Veracruz	35.00	35.00	0.00%						0.00%
Imported Pintos	Imported	28.00	29.00	-3.45%	29.00	30.00	-3.33%	33.00	33.00	0.00%
Pinto Saltillo	Zacatecas									
Pinto Saltillo	Nayarit							26.00	26.00	0.00%
Pinto Saltillo	Chihuahua	28.00	28.00	0.00%	25.00	26.00	-3.85%			0.00%
Pinto Saltillo	Durango						0.00%			
Small Alubia	Imported	30.50	31.00	-1.61%	40.00	33.00	21.21%	30.00	31.00	-3.23%
Large Alubia	Imported	37.50	38.00	-1.32%	40.00	33.00	21.21%	34.00	42.00	-19.05%
Flor de Junio	Zacatecas	32.00	31.00	3.23%				26.00	26.00	0.00%
Flor de Mayo	Zacatecas	34.00	33.00	3.03%				26.00	26.00	0.00%
Bayo Berrendo	Jalisco							35.00	35.00	0.00%
Bayo	Zacatecas	39.00	39.00	0.00%				53.00	53.00	0.00%
Garbancillo	Zacatecas	46.50	46.50	0.00%						0.00%
Canario	Sinaloa							28.00	28.00	0.00%
Cacahuete Bola	Jalisco	33.00	33.00	0.00%						0.00%
Garbancillo Zarco	Jalisco									0.00%
Azufrado	Sinaloa			0.00%				49.00	49.00	0.00%
Mayocoba	Sinaloa			0.00%				31.00	31.00	
Peruano	Sinaloa	31.00	31.00	0.00%	32.00	34.00	-5.88%	30.00	31.00	-3.23%
Small Chickpea	Sinaloa	30.00	31.00	-3.23%	30.00	27.50	9.09%	32.50	34.00	-4.41%
Large Chickpea	Sinaloa	32.50	33.50	-2.99%	30.00	27.50	9.09%	35.00	30.00	16.67%



MONTH: June 2025 vs. May 2025										
MONTHLY CENTRAL MARKET WHOLESALE AND SEMI-WHOLESALE REPORT										
PRODUCT VARIETY	product origin state / country	SINALOA price (\$/KG)		VAR %	ZACATECAS price (\$/KG)		VAR %	CHIHUAHUA price (\$/KG)		VAR %
		current 06 30 25	past 05 30 25		current 06 30 25	past 05 30 25		current 06 30 25	past 05 30 25	
Imported Black	Imported									
Jamapa Black	Zacatecas				28.00	28.00	0.00%			
Nayarit Black	Nayarit									
San Luis Black	Zacatecas				27.00	30.00	-10.00%			
Veracruz Black	Veracruz									
Imported Pintos	Imported							28.00	30.00	-6.67%
Pinto Saltillo	Zacatecas				24.00	24.00	0.00%			
Pinto Saltillo	Nayarit									
Pinto Saltillo	Chihuahua						0.00%	24.00	23.00	4.35%
Pinto Saltillo	Durango									
Small Alubia	Imported				21.00	21.00	0.00%	37.00	37.00	0.00%
Large Alubia	Imported				22.00	22.00				
Flor de Junio	Zacatecas						0.00%			0.00%
Flor de Mayo	Zacatecas				24.00	24.00	0.00%	37.00	37.00	0.00%
Bayo Berrendo	Jalisco							34.00	34.00	0.00%
Bayo	Zacatecas				29.00	29.00	0.00%	32.00	28.00	14.29%
Garbancillo	Zacatecas						0.00%			0.00%
Canario	Sinaloa									
Cacahuete Bola	Jalisco						0.00%			0.00%
Garbancillo Zarco	Jalisco						0.00%			0.00%
Azufrado	Sinaloa	32.00	32.00	0.00%						
Mayocoba	Sinaloa	29.00	28.00	3.57%						
Peruano	Sinaloa	29.00	28.00	3.57%	30.00	32.50	-7.69%			
Small Chickpea	Sinaloa				30.00	30.00	0.00%			
Large Chickpea	Sinaloa	24.00	24.50	-2.04%	30.00	30.00		36.00	36.00	0.00%
MONTHLY CENTRAL MARKET WHOLESALE AND SEMI-WHOLESALE REPORT										
PRODUCT VARIETY	product origin state / country	NAYARIT price (\$/KG)		VAR %	YUCATAN price (\$/KG)		VAR %	DURANGO price (\$/KG)		VAR %
		current 06 30 25	past 05 30 25		current 06 30 25	past 05 30 25		current 06 30 25	past 05 30 25	
Imported Black	Imported									
Jamapa Black	Zacatecas									
Nayarit Black	Nayarit	n/a	37.00							
San Luis Black	Zacatecas				30.00	34.00	-11.76%	35.00	35.00	
Veracruz Black	Veracruz									
Chiapas Black	Chiapas									
Imported Pintos	Imported									
Pinto Saltillo	Zacatecas	n/a	32.50							
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	18.00	150.00%	32.00	32.00	0.00%
Bayo Berrendo	Jalisco	n/a	37.00							
Bayo	Zacatecas	n/a	49.00		40.00	40.00		35.00	35.00	0.00%
Garbancillo	Zacatecas	n/a	59.00							
Canario	Sinaloa									
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	38.00	5.26%



Trade Policy

TARIFFS. July 4th update

-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 counterparts, 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 will receive 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.

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-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 – June 2025

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

Mexico's Main Economic Indicators	Information Available July 4, 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. June 2025	MX\$19.05 June / MX\$20.44 May / USD. MX\$20.09 in Apr
Unemployment Rate May 2025	2.75%,
Inflation Rate Y/accu to May 2025 est.	4.42%, up from 3.93% April, up from 3.77% in March
Mexican Crude Oil Price July 1, 2025	US\$61.59 per barrell US\$74.80 in March 2024
International Reserves June 27, 2025	US\$241.48 billion
Trade Balance Imports-Exports Y2024 USA-MX	US\$839.9 billion both ways

-Mexico is facing yet another challenge derived from the US Government efforts against the Mexican drug cartels. In the last week of June, the US Treasury targeted three Mexican financial institutions: Banco CI, Vector Casa de Bolsa and Intercam Banco, accusing them of charging them of money laundering and handling payments for fentanyl precursors, which makes them eligible for Fentanyl Sanctions, that imply the banning of certain transactions between US banks and these MX institutions. The three banks denied any crime implication.

-As a result, the Mexican government and Mexican banks regulator Mexican Commission of Banks and Treasure – CNBV, implemented temporary control to start an investigation and protect depositors' assets. The Mexican government however, is demanding proof of crime to the US government. According to specialists, least for the moment, this accusation is a red flag for Mexican medium-small banking institutions, that could eventually result in extensive damage to the Mexican financial system

-Despite of the blow, the Mexican currency and stock exchange, did not react negatively. The Mexican Central Bank's BANXICO governor Victoria Rodriguez, stressed that the Mexican financial system is solid and that maintains and surpasses the standards established by the international authorities

-Inflation rate moderated in the second half of June at 4.51% annual, however, the subjacent inflation is high at 4.20%, the highest since May 2024. The services sector continued to increase for the third consecutive time in the last 45 days. Food prices in restaurants, as part of the services sector, is a factor, and authorities will be vigilant.

-Mexico's imports increased 1.43% annual in May, higher than the previous month when it contracted -1.24%. Oil and intermediate products imports increased 28.9% and 3.99% respectively, while consumption goods imports decreased 0.49%

-Average exchange rate in May was MX\$19.05/USD, down from MX\$20.44/USD and MX\$20.09 in April, 2025

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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.

Chihuahua's Dept. of Rural Development Highlights Precipitations Strengthened 375,000 + Hectares of Corn, Beans, Oats, Sorghum
Expres July 4, 2025

Chihuahua. Chihuahua's Department of Rural Development (SDR), reported that the precipitations received in recent weeks, strengthened the Chihuahua's lands, particularly the more than 375,000 hectares of rainfed crops such as corn, beans, oats and sorghum.

Rogelio Olvera, Chief of Rural Development, explained that these crops are essential for food security and the rural economy, as they represent an important part of the Spring-Summer cycle. For beans, a traditional rainfed crop in regions such as Santa Isabel and Gran Morelos, an area of between 80 and 90 thousand hectares is projected. Although the recommended planting period concludes in mid-July, the rains could allow for the establishment of crops that can be planted in the first 10 days of August.

"The impact of these rains has been evident: we see greater activity in planting, land preparation and movement throughout the agricultural sector. This is a very important boost for our rural communities," Olvera Bueno emphasized.

The SDR will continue to monitor weather conditions and provide technical support to producers to make the most of this rainy season in favor of the state's agricultural development.

The Bean Self-Sufficiency Program Was Launched in Sombrerete Bean Areas
MegaNoticias Zacatecas June 20, 2025

ZACATECAS, ZAC. The Secretary of Agriculture Julio Berdegué Sacristán, said that 5,700 MT of certified seed will be used for the planting of 230,000 hectares, with the goal of producing 1,200,000 MT of beans.

4,500 MT of San Luis black bean seed and 1,200 MT of Pinto Saltillo bean seed, were delivered benefiting of 45,000 small producers in 33 municipalities in Zacatecas to plant 230,000 hectares. The seed, with a subsidized cost of 8.75 pesos per kilo for black San Luis and 10 pesos for pinto Saltillo, is financed mainly by the federal and state governments.



The program includes free fertilizer, a constitutional right, delivered to all beneficiaries of the seed, which has already distributed 18,000 of 30,000 MT in Zacatecas.

David Monreal Avila, Governor of the State, said that this program will eliminate the importation of 30% of the beans consumed in Mexico.

In response to growers' demands for the opening of collection centers and the eradication of corruption within them, federal authorities promised to reopen these spaces and make the purchase schedule official to avoid bottlenecks in marketing.

In addition, credit is offered to small producers at a rate of 8.5 percent under the "Cosechando Soberanía" – "Harvesting Sovereignty" program, accompanied by free agricultural insurance to cover debts in the event of bad harvests.

At the national level, this program has an investment of US\$7.5 million in seed and US\$26 million in fertilizer. Zacatecas leads the national goal for bean production, contributing with 34% of the beans produced in Mexico.