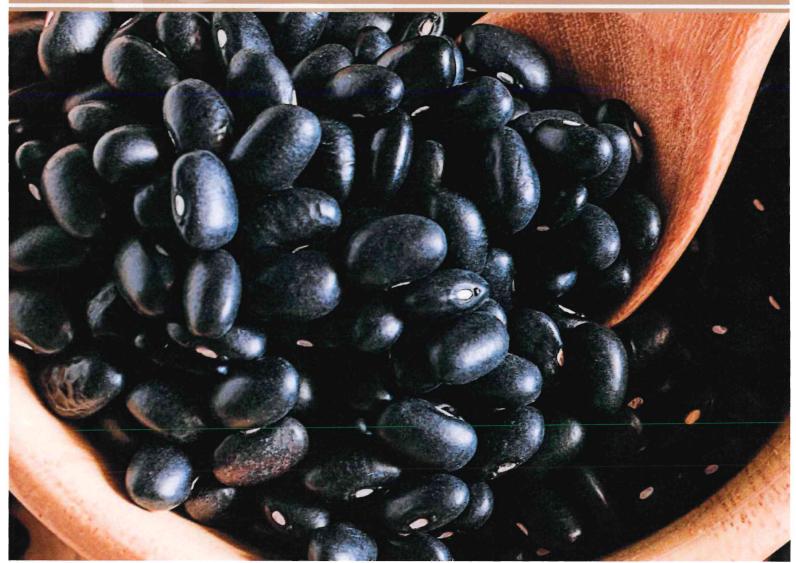
USDBC Mexico Report

2025 Mexico Crop and Market Update May 2025 USDBC Report



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USDBC May 2025 Mexico Monthly Report

2025 Spring-Summer Beans - June 3rd Update

- -In the last week of May-first days of June, drought continues to expand in Chihuahua, Durango and Zacatecas, and no planting intention has been published until the first week of
- -In the second week of May, the Mexican Department of Agriculture-SADER, informed that the bean planting of the 2025 Spring Summer cycle has a delay, and the soils preparation to plant, has a progress of around 15%, which correspond to irrigated beans
- -Irrigated beans in Zacatecas, Durango and Chihuahua, that account for around 10% of the total this cycle, must be have been planted by now, however, SIAP published a preliminary progress report until the end of April, where 87,994 hectares had been planted. It is important to mention that in the report, Durango is not showing any irrigated bean hectares planted, when historically, they do plant irrigated beans:

经过载的特殊	GOVERNMENT	IRRIGATED	25 SPRING - + DRYLAND S	SUMMER CYC	LE MEXICO D	RY BEANS PL	ANTING SEAS	ON
	SUR	FACE - HECTARE	S	1 1 Le 12 le				
1	Government's	Planted			PRODUCT	ION - MT	YIELD	COULA
STATE CHIAPAS	Planting Intention / NOT AVAILABLE	hectares according to Government	Harvested according to government	Damaged according to	Government Expectation / NOT	Obtained according to	Expected by Government / NOT	Obtained
CHIHUAHUA		2,327	0	government	AVAILABLE	Government	AVAILABLE	according to
DURANGO		564	0				MAILABLE	Governmen
GUANAJUATO		0	0					
GUERRERO		2,361	0					
MEXICO		0	0					
MICHOACAN		45	0					
DAXACA	1	210	0					
PUEBLA		2,281	0					
UERETARO		4,447	0					
AN LUIS POTOSI		582	0					
ACATECAS		340	0					
THER		69,943	0					
TOTAL		4,895	0					
ource: SIAP		87,994	0					

- -Reportedly, SADER has in its 2025 plans, to "reorganize" the SIAP- Agricultural Information System, passing from being a decentralized government instance, to an information section in the Department of Agriculture. This will potentially increase the difficulty to obtain accurate planting-harvesting progress numbers.
- -Weather. At the end of May, the situation continues to be bad, not just for dry beans, but for all other Spring-Summer crops planted in the North-Central part of Mexico and cattle,



-The latest Mexico Drought Monitor May 15th, shows that:

- Zacatecas, Durango and Chihuahua are 100% in drought
- Guanajuato is experiencing drought in 98.5% of its territory
- San Luis Potosi experiencing drought in 91% of its territory

	A	rea % u	ntil May	15. 20	25	
State	No Affectation	DO DO	-	-		
Aguascalientes Baja California	0.0		D1		Contract of the Contract of th	D4
Baja California	0.0	88.2		- 0.0	0.0	0.0
Baja California Sur Campeche	0.0	1.1	83.		7.0	0.0
Cookuile d. =	82,6	24.2	and the last terminal designation of the last terminal designation		0.0	0.0
Coahuila de Zaragoza Colima	22.9	17.4	0.0	0.0	0.0	0.0
Chiapas	62.6	18.7	13.0		13.2	
Chihuahua	69.5	36.6	0.8	0.0	0.0	0.0
Ciudad da accident	0.0	30.4	0.1	0.0	0.0	0.0
Ciudad de México	100.0	0.0	0.0	2.5	55.2	42.3
Durango	0.0	0.0	0.0	0.0	0.0	0.0
Guanajuato	1.5	4.9	17.4		38.8	15.3
Guerrero	88.4	50.1	48.4	0.0	0.0	0.0
Hidalgo	46.6	6.5	5.1	0.0	0.0	0.0
Jalisco	29.3	36.2	17.2	0.0	0.0	0.0
Estado de México	77.8	36.1	34.6	0.0	0.0	0.0
Michoacán de Ocampo	48.5	15.2	7.0	0.0	0.0	0.0
Morelos	44.9	50.5	1.0	0.0	0.0	0.0
Nayarit	14.1	34.0	21.1	0.0	0.0	0.0
Nuevo León	64.1	63.7	18.0	4.2	0.0	0.0
Oaxaca	78.4	18.1	17.2	0.4	0.2	0.0
Puebla	75.6	12.7	8.9	0.0	0.0	0.0
Querétaro de Arteaga	0.0	21.6	2.8	0.0	0.0	0.0
Quintana Roo	100.0	27.6	72.4	0.0	0.0	0.0
San Luis Potosí	9.1	0.0	0.0	0.0	0.0	0.0
inaloa	0.0	61.1	29.8	0.0	0.0	0.0
onora	0.0	0.0	0.5	7.8	58.7	33.0
abasco	42.1	0.0	0.0	3.5	49.2	47.3
amaulipas	87.3	35.9	22.0	0.0	0.0	0.0
laxcala	100.0	9.7	1.5	1.2	0.3	0.0
eracruz ucatán	F2.2	0.0	0.0	0.0	0.0	0.0
	100.0	32.5	15.2	0.0	0.0	0.0
acatecas		0.0	0.0	0.0	0.0	0.0
	0.0	67.6	30.7	1.7	0.0	0.0

Raining season in Mexico in the bean states

CONAGUA's national observatory, forecasted that Zacatecas and Durango in May, would receive an accumulated rainfall of 0.37 in, 70% of the historical average of 0.53 in, however, it was visible they did not receive that In June, they are expected to receive 3.34 in, 135%

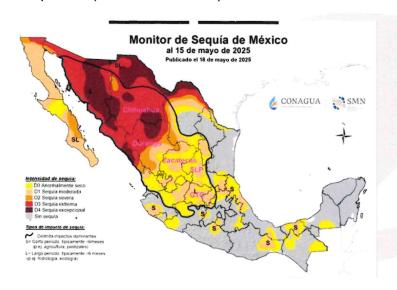
In July, the forecast estimates rainfall of 3.9 in, which corresponds to 85% of the 4.6 in. his-

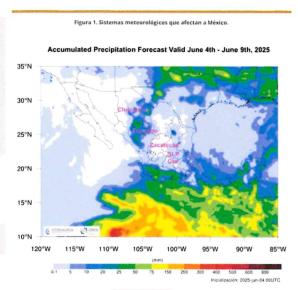
Meanwhile, in the week that starts June 4th, a dry line over the north of Mexico in interaction with the subtropical jet stream and divergence, will cause on Friday June 6th, showers with intervals of showers in the north and northeast of Mexico, and strong gusts of wind in the north, with possible formation of whirlwinds in areas of Chihuahua and Coahuila.

The heat wave prevails in the states of Chihuahua, Sonora (south), Coahuila, Nuevo Leon (south), Tamaulipas (south and southwest), Durango, Zacatecas, San Luis Potosí, Aguascalientes (west), Sinaloa, Nayarit, Jalisco (south and west), Colima, Michoacán (west,



center and southeast), Guerrero (west and north), Oaxaca (center and south) and Campeche (north and west).





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 W	inter+ Spring	g-Summer	
JAK	Intention	Planted has.	Harvested	Yield kg	Production MT
Zacatecas					
Durango					
Chihuahua	PENDING	A RESIDENT			
Chiapas	PENDING	A CHARLES			
San Luis Potosi					
Guanajuato					
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	100,226	66,861	728	48,714
Total	255,528	274,630	206,102	1,270	262,363

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

MX DRY BEANS					CYCLES - S MENT NUI		ER TO AU	GUST NEX	T YEAR
	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 3rd Update

- No current update, however, 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 Grabanzo-Chickpea Plant	ing-Harvesti	na -Productio	n Hectares -	MT FALL WIN	ITER 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			Productio	n - MT	Yield k	ilos/has		
State	Government's Planting Intention	Planted hectares 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		
Guanajuato	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		





Mexican Market Situation June 3rd, Update

-Local pinto bean prices in Zacatecas and Durango continue going down, in the last week of May prices are as low as MX\$17,000 / US\$850 per MT.

The Federal Government's price guarantee program of MX\$27 thousand / US\$1,350 per MT has closed, and intermediaries in those areas are taking advantage of that situation.

- -The Mexican bean market continues to be very quiet; importers with low sales and high stocks from 2024, lower prices of pintos are affecting US beans purchased at higher price
- -Brazil and Argentina, continue to take advantage of the anti-inflationary program APECIC, that allow them to export to Mexico tariff-free, actively visiting the market offering upcoming black bean crops, delivered at the port of Veracruz at prices as low as US\$800 per MT, down from US\$950 to US\$1,050 last month. Argentina will start harvesting black beans this May and June. Brazil is trying to do anything to win some market share in Mexico, and offered this month, US\$650 per MT, for a minimum of 15 thousand MT, delivered in TOTES.
- -Quality of Brazilian and Argentinean black beans has not been good, long cooking times and complicated logistics. However, they are apparently willing to sacrifice margin to continue entering in the market.
- -Total Bean imports from all origins continued mounting in March 2025, reaching 24,671 MT / US\$21.89 million, very high, considering the high stocks in hands of the importers, but these still correspond to those volumes purchased since the end of 2024, delayed by the embargo. US bean imports in March were 20,816 MT / US\$21.9 million 74% of the total, followed by 15% Canada 3,580 MT / 3.85 million; 1% Brazil 250 MT / US\$227,500 and China 25MT / US\$74,766.
- -Accumulated bean imports in the September-March period, 7 months into the Commercial Year 2025, reached 163,953 MT / US\$176.24 million.

2021-2025 Sept	ember to Au	gust - U.S. DRY	BEANS to	MEXICO - USD	A COMMER	CIAL YEAR IMP	ORTS acc	ording to Mexica	n data		
	2	021	2	022		2023		2024		2025 (Set2024-Mar2025)	
TARIFF CODE / DESCRIPTION	MT	US\$	MT	US\$	MT	US\$	MT	us\$	MT	US\$	
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	
Black, pinto, white and other beans	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	
0713.33.99	210,016	188,214,078	61,622	69,555,586	145,773	171,509,346	331,777	403,389,678	121,853	133,748,019	
TOTAL	210,016	\$188,214,078	61,622	\$69,555,586	145,773	\$171,509,346	331,777	\$403,389,678	121,853	\$133,748,019	

Prepared by: Mercalimentos with Mexican Customs data



USD	Mexico's D		TEMBER 2024 orts-All Origin		2025
All beans: pintos, black, white, all 0713.33.99	COUNTRY OF ORIGIN	VOLUME IN KILOGRAMS	VOLUME METRIC TONS	Avg. market share USA 74%	COMMERCIAL VALUE \$USD
TOTAL ALL		163,953,404	163,953		\$176,238,267
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
March 2025	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%	
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%	
January 2025	CHINA			0%	550.000
January 2025	BRAZIL Subtotal	500,000 13,778,218	500 13.778	3% 100%	550,000 14,615,473
	Jubiotal	10,110,210	15,770	10076	14,010,47
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%	9,707,24
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	lle4	20 404 640	20.422	7001	00 740 44
October 2024	USA CANADA	30,101,643	30,102	70%	33,718,114
October 2024 October 2024		4,909,328	4,909	11%	5,567,428
	ARGENTINA	7,555,050		18%	8,796,702
October 2024	BRAZIL Subtotal	375,000 42,941,021	375 42,941	1% 100%	454,750 48,536,994
	Jubiotal	42,341,021	42,341	100%	40,030,994
September 2024	USA	20,675,243	20,675	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	1,134,108		3%	1,403,29
	Subtotal	32,669,241	32,669	100%	38,477,83

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 May vs. April 2025: Reduction or -6.25% in Mexico City, steady in Monterrey and +3.23% increase in Guadalajara, average price at MX\$32 / US\$1.6 per kilo. In May, US black prices were again, 4% higher than MX blacks avg. price of MX\$31 / US\$1.50 per kilo.
- US Pinto beans prices in May vs. April 2025, registered reductions of -6.4% in Mexico City, -6.25% in Monterrey. Avg. price MX\$31 / US\$1.55 per kilo. This month US pinto prices were 15% higher than average price of MX pintos MX\$26.6 / US\$1.33 per kilo
- U.S. Large and Small Alubias Prices in May vs. April 2025, had reductions with large alubias -18.5% in Mexico City, and -7% in Monterrey, and big increase of +23.5% in Guadalajara, prices from MX\$30 to MX\$42 per/ US\$1.50 to US\$2.10 per kilo, depending on size and market
- Peruanos, Mayocoba, Azufrados prices in May vs. April 2025, steady in Mxcity and Monterrey, same prices as last month, from MS\$29 to MX\$39 US\$1.45 to US\$1.85 per kilo, but a big jump in Guadalajara, passing from MX\$41 to MX\$49 / US\$2.45 per kilo, +19.5% increase
- Mexican colored varieties: Bayos, Canario, Cacahuate, Flor de Mayo and Flor de Junio prices, May vs. April 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 May vs. April 2025, large garbanzos in Mexico City, Monterrey and Guadalajara had reductions of up to 4.8%, avg. price around MX\$30 / US\$1.50 per kilo. Small caliber increased 10% in Guadalajara.





		MONTH	ILY CENTRA		May 2025 vs		VHOLESALI	E REPORT		
PRODUCT	product origin	MEXICO CITY price (\$/KG)		VAR	MON price (TERREY \$/KG)	VAR	GUADA price (LAJARA \$/KG)	VAR
VARIETY	state / country	current 05 30 25	past 04 31 25	%	current 05 30 25	past 04 31 25	%	current 05 30 25	past 04 31 25	%
Imported Black	Imported	30.00	32.00	-6.25%	33.00	33.00	0.00%	32.00	31.00	3.23%
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	32.00	33.00	-3.03%				36.00	36.00	0.00%
Veracruz Black	Veracruz	35.00	35.00	0.00%						0.00%
Imported Pintos	Imported	29.00	31.00	-6.45%	30.00	32.00	-6.25%	33.00	33.00	0.00%
Pinto Saltillo	Zacatecas									
Pinto Saltillo	Nayarit							26.00	25.00	4.00%
Pinto Saltillo	Chihuahua	28.00	30.00	-6.67%	26.00	26.00	0.00%			0.00%
Pinto Saltillo	Durango						0.00%			
Small Alubia	Imported	30.50	30.00	1.67%	33.00	35.50	-7.04%	31.00	30.00	3.33%
Large Alubia	Imported	37.50	46.00	-18.48%	33.00	35.50	-7.04%	42.00	34.00	23.53%
Flor de Junio	Zacatecas	31.00	31.00	0.00%				26.00	27.00	-3.70%
Flor de Mayo	Zacatecas	33.00	33.00	0.00%				26.00	27.00	-3.70%
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%
Cacahuate Bola	Jalisco	33.00	33.00	0.00%						0.00%
Garbancillo Zarco	Jalisco									0.00%
Azufrado	Sinaloa			0.00%				49.00	41.00	19.51%
Mayocoba	Sinaloa			0.00%				31.00	31.00	
Peruano	Sinaloa	31.00	31.00	0.00%	34.00	39.00	-12.82%	31.00	31.00	0.00%
Small Chickpea	Sinaloa	31.00	31.00	0.00%	27.50	28.00	-1.79%	34.00	31.00	9.68%
Large Chickpea	Sinaloa	33.50	35.00	-4.29%	27.50	28.00	-1.79%	30.00	31.00	-3.23%

BANK BANK	A TOTAL PARTY			MONTH:	May 2025 vs	. April 2025	THE REAL PROPERTY.	MAN DAY	100	The self
		MONTH	LY CENTRA	L MARKET	WHOLESALE	AND SEMI-V	WHOLESALI	REPORT		
PRODUCT	product origin	SINALOA price (\$/KG)		VAR	ZAI price (CATECAS \$/KG)	VAR	CHIHUAHUA price (\$/KG)		VAR
VARIETY	state / country	os 30 25	past 04 31 25	%	o5 30 25	past 04 31 25	%	current 05 30 25	past 04 31 25	%
Imported Black	Imported									
Jamapa Black	Zacatecas				28.00	28.00	0.00%			
Nayarit Black	Nayarit									
San Luis Black	Zacatecas				30.00	30.00	0.00%			
Veracruz Black	Veracruz									
Imported Pintos	Imported							30.00	28.00	7.14%
Pinto Saltillo	Zacatecas				24.00	24.00	0.00%			
Pinto Saltillo	Nayarit									
Pinto Saltillo	Chihuahua						0.00%	23.00	26.00	-11.54%
Pinto Saltillo	Durango									
Small Alubia	Imported				21.00	28.00	-25.00%	37.00	36.00	2.78%
Large Alubia	Imported				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	28.00	3.57%	28.00	33.00	-15.15%
Garbancillo	Zacatecas						0.00%			0.00%
Canario	Sinaloa									
Cacahuate Bola	Jalisco						0.00%			0.00%
Garbancillo Zarco	Jalisco						0.00%			0.00%
Azufrado	Sinaloa	32.00	32.00	0.00%						
Mayocoba	Sinaloa	28.00	27.00	3.70%						
Peruano	Sinaloa	28.00	27.00	3.70%	32.50	34.00	-4.41%			
Small Chickpea	Sinaloa				30.00	30.00	0.00%			
Large Chickpea	Sinaloa	24.50	25.00	-2.00%	30.00	30.00		36.00	36.00	0.00%

	New York				May 2025 vs			1000		
PRODUCT	product origin	NAYARIT price (\$/KG)		VAR	MARKET WHOLESALE AND SEMI-W YUCATAN VAR price (\$/KG)			DURANGO price (\$/KG)		VAR
VARIETY	state / country	current 05 30 25	past 01 31 25	%	current 05 30 25	past 04 31 25	%	current 05 30 25	past 04 31 25	%
Imported Black	Imported									
Jamapa Black	Zacatecas									
Nayarit Black	Nayarit	n/a	37.00							
San Luis Black	Zacatecas				34.00	34.00	0.00%	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		18.00	18.00	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		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		38.00	45.00	-15.56%

Trade Policy

TARIFFS. June 3rd 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 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 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.

- -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 – May 2025

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

Mexico's Main Economic Indicators	Information Available June 3, 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. May 2025	MX\$20.44 / USD. MX\$20.09 in Apr; MX\$20.46 in Feb 2025
Unemployment Rate April 2025	2.5%,
Inflation Rate Y/accu to April 2025 est.	3.93% up from 3.77% in March, 3.59% in Jan, down from 4.21% in Dec. 2024
Mexican Crude Oil Price June 2, 2025	US\$58.23 per barrell US\$74.80 in March 2024
International Reserves May 30, 2025	US\$239.93 billion
Trade Balance Imports-Exports Y2024 USA-MX	US\$839.9 billion both ways

Trade Policy - Tariffs. June 3rd 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 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
- Tariffs over car parts not complying On April 29th, President Trump paused for 2 years, with the rules of origin established in the USMCA, which assembling ends in the United States. The US government will apply a credit equivalent to 3.75% of the car's value, considering that the value of the parts in question constitute 15% of the total value, for cars assembled in the April 3rd, 2025-April 30th, 2026, and a 2.5% credit for cars assembled between May 1, 2026 and April 30th, 2027
- -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. Previously, Mexican Secretary of Agriculture had been in conversations with US Secretary of Ag. Brooke Rollins and Undersecretary of State Christopher Landau, to get an extension to deliver, as Mexico has not been able to comply due to the extreme drought in the last 4 years
- -On the morning of April 3rd, Mexican President Claudia Sheinbaum stated that there would not be **no** retaliatory tariffs or measures from Mexico.
- -Economy. -The Mexican economy avoided falling into a recession after Q1, with a super narrow growth off 0.2%. According to analysts Q2 looks grey already, with tariffs haunting, and the USMCA renegotiation at the door.
- -As of the end of May, Mexico is experiencing several challenges, however, there are two that are affecting directly the nation's GDP: the **halt of Mexican cattle exports to the USA**, **due to the screwworm outbreak**, **US\$1.3 billion loss**, the situation will continue most likely until the end of 2025.



The other one is the money remittances of Mexican workers in the USA.

- -According to the Mexican Central Bank-BANXICO, **remittances registered a -12% drop annual** in April, the worst reduction since 2012, as a result of the new US migratory policy, with Mexican workers in the USA, fearful of going out on the streets, -to work or to send money, at the risk of being deported, and also due to the U.S. slower economy.
- -On top of this, the **3.5% tax over remittances** that will impact both illegal and legal workers that send money to their loved ones in other countries, further reducing several economies' growth, being Mexico the most damaged one, when this tax is approved. Remittances remain one of the top sources of income for Mexico, and the impact of this tax could be close to **3% of the GDP**. According to international specialists, this measure will potentially incentivize more migration, rather than reducing it. -BANXICO trimmed the interest rates in May, leaving the reference rate at 8.50%, and informed that
- -BANXICO trimmed the interest rates in May, leaving the reference rate at 8.50%, and informed that they foresee another cut in mid-June. Nevertheless, they revised down their GDP growth for 2025 from previous 0.6% to 0.1%, and for 2026, 0.9% down from previous 1.8%
- -Inflation in the first half of May reached 4.22%, higher than the 4.02% previous estimation and parting far from the ±3% objective, that had been on trend since December 2024, higher food and fuel prices are two of the main factors pushing up inflation rate
- -On the brighter side, direct foreign investment reached record high in the two first months of the year, with US\$21.4 billion, a +5.4% increase from 2024. According to the Mexican government, this increase is a confidence vote from international investors, despite of the commercial turmoil with the United States. The United States remains the main investor with 37.8%, followed by Spain and the Netherlands with 15% and 8.4% respectively, the UK 5.7% and Germany 5%, all these accumulating 71.4% of the total.

Exchange Rate. Exchange rate has been stable until now, no important reaction to the different happenings, including the latest steel and aluminum tariffs increase. Average exchange rate in May was MX\$19.44/USD. Banxico is expecting that exchange rate will close 2025 at MX\$20.69/USD and for 2026 at MX\$20.63/USD. Nevertheless, Bank of America stated days ago, that the Mexican currency is 10% overvalued.

Politics - Policy -Sunday June 1st, was the day to elect judges and justices in Mexico, through popular vote, -for the first time in history, in a botched process. Despite of the government cheering success, the turnout was actually very low, a sign of rejection from most Mexicans, to an unwanted Judicial Reform that will potentially give full power to the ruling party, with Justices that are close to the Mexican President and the party, giving them full control over the Supreme Court. This Judicial Reform, has been widely criticized by international experts, as it breaks the power balances and is anti-democratic.



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.

Zacatecas Ag. Producers Ask for a Declaration of Emergency to Access Supports and Subsidies MegaNoticias May 29, 2025

Zacatecas. Zacatecas faces a new agricultural season in critical conditions: lack of rainfall, high energy costs and poor institutional response have put the countryside on the brink of collapse.

The latest Drought Monitor of the National Water Commission (CONAGUA) reported Zacatecas with 32 municipalities with moderate drought, 24 in abnormally dry conditions and two -Mazapil and General Francisco R. Murguía- already with severe drought.

Without water, without support and with debts, the ag. land is emptying, and inputs such as electricity have become unaffordable for many small producers. Faustino Adame Ortiz, rural representative of the Frente Popular de Lucha Zacatecas (FPLZ) stated: "There has been a 20% or 30% decrease in grain production in Zacatecas, in both the rainfed areas, which is the majority, and in irrigation zones, the irrigation zone is also in a very precarious situation".

In the irrigation zone, the energy quota is not applied evenly and there's a lack of current concessions, before CONAGUA blocks access to electricity subsidies.

By 2025, the Farmers of Agricultural and Livestock Areas considered that up to 90% of the producers will be left without the benefits of social programs. Santiago Murillo also explains: "The ones that are being benefited, are people who no longer plant, now they say that they are already small producers, well here we have to make policy

where the norm and the rule also benefits medium or large producers". The abandonment of the agriculture is intensifying. According to farmers, 60% of the irrigation units are at a standstill or operating at half capacity. The lack of clear public policies aggravates the exclusion of active producers.



Zacatecas agriculture is in a critical situation: if an emergency declaration is not activated to guarantee access to low-cost subsidized electricity, fertilizers and concessions, the loss of production and migration will be inevitable.

Important Reduction in Rainfed Crops in Cuauhtémoc Chih. is Foreseen due to Drought El Heraldo de Chihuahua, May 29, 2025

Chihuahua. According to the Director of Rural Development of the Municipality of Cuauhtémoc, Claudia Gutiérrez Majalca, the outlook for rainfed agriculture is uncertain, due to the discouragement among producers because of the prolonged drought that has affected the rural area since 2023, which anticipates a marked reduction in the area destined for rainfed crops. She explained that this situation is reflected in the minimal number of producers who have come to request government



support for the delivery of oat, bean and sorghum seeds, indicating that many will refrain from planting to avoid investments in agricultural inputs.

Since 2023, farmers in Cuauhtémoc's rural communities have suffered a considerable economic impact, being forced to request credit for the purchase of fertilizers and essential materials to ensure the production of main crops such as oats and beans.





U.S.-Mexico Agricultural Trade Roundtable





On Monday June 2nd 2025, Dylan Karley and Raul Caballero attended the Transportation Roundtable for Cross Border by Rail at the American Chamber Offices in Mexico, organized by the Agricultural Trade Office from the FAS-USDA from the U.S. Embassy in Mexico. The meeting was inaugurated by the new USA Ambassador for the United States in Mexico, Honorable Ron Johnson and by the Mexico's Secretary of Agriculture Julio Verderdegue. Ambassador Johnson left a very clear message addressing how the USA and Mexico need to be perfectly integrated in trade, and addressed that his job in Mexico is to ensure that path is followed.

The 2025 U.S.–Mexico Agricultural Trade Roundtable convened stakeholders from both nations to address shared challenges and opportunities in agricultural logistics and market access. The roundtable focused on record-setting trade volumes, modal transportation shifts, infrastructure needs, and the importance of cross-border coordination.

U.S. agricultural exports to Mexico reached nearly 30 million metric tons in 2024—a 34% increase from the five-year average—driven in part by reduced demand from China and favorable proximity. Rail emerged as the dominant mode of transport for U.S. corn, wheat, and soybeans into Mexico, now accounting for roughly 70–75% of shipments. Soybeans in particular have seen a rise in rail share due to their high demand in Mexico's growing livestock sector and the need for expanded domestic crushing capacity.

Key rail gateways—including Laredo, El Paso, and Eagle Pass—handle distinct flows: corn and soybeans primarily move through Laredo, while El Paso manages longer-haul wheat shipments reaching central Mexican regions like Mexico City. USA pulses mainly have been exported through Eagle Pass and Laredo. On the ocean freight side, the Mississippi River-Gulf port corridor remains important, although seasonal backlogs and limited cold chain logistics shift some flows to Pacific ports or intermodal rail.

The creation of the CPKC railway (from the merger of Canadian Pacific and Kansas City Southern) has realigned routes, enabling end-to-end service from Canada to Mexico. While this expanded network has improved fluidity, it also resulted in transitional disruptions—such as a shift in containerized shipments from Laredo to El Paso. The use of 110-car shuttle trains has improved grain handling



efficiency, but infrastructure has not kept pace with volume. Mexican investment in four new shuttle terminals, increasing national grain handling capacity by an approximate of 10%, demonstrates efforts to expand capacity, but operational bottlenecks persist.

Despite 7-day rail operations, border inspections by USDA and SADER remain constrained to weekday schedules, creating choke points. Inconsistent or overlapping regulatory frameworks, lack of coordinated pre-clearance systems, and limited staffing further challenge the continuity of service, especially during peak export seasons.





Beyond logistics, evolving market dynamics have influenced trade volumes. With China reducing grain imports in 2024, U.S. exporters redirected corn and sorghum to Mexico. Rising domestic demand for animal protein in Mexico also underscores the urgency for soybean processing infrastructure, creating long-term synergies with U.S. producers of whole soybeans and soybean meal.

Stakeholders highlighted the need for binational regulatory alignment and infrastructure investment to meet future demand. Suggestions included adapting the U.S. grain logistics coordination model—such as pre-harvest stakeholder meetings—for cross-border planning. Consistent inspection hours, streamlined customs documentation, and improved data sharing between USDA, SADER, and SENASICA were repeatedly mentioned as priority actions.

Rail companies are instrumental to trade fluidity. Union Pacific has made strategic upgrades at Eagle Pass and improved railcar availability and scheduling transparency. Ferromex (FXE), Mexico's largest railroad, is expanding shuttle terminals and inland logistics hubs, especially in Guanajuato, Jalisco, and the State of Mexico. It is also improving cargo traceability and customs integration systems. Meanwhile, BNSF Railway, while less directly involved in Mexican operations, supports U.S. grain origination and facilitates southern-bound exports through transload partnerships.



Strategic routing has become increasingly crop-specific: corn and soybeans typically move via Laredo due to shorter distances and demand hubs, while wheat and dry beans use longer inland routes through El Paso. These alignments optimize shipment timing and reduce congestion at overburdened crossings.

Technology and real-time data are playing a growing role. The integration of U.S. Surface Transportation Board data with Mexican logistics platforms allows better forecasting of choke points and more effective allocation of rail assets. Intermodal flexibility—rail-to-ocean or rail-to-truck—gives exporters more options, particularly during peak season disruptions.

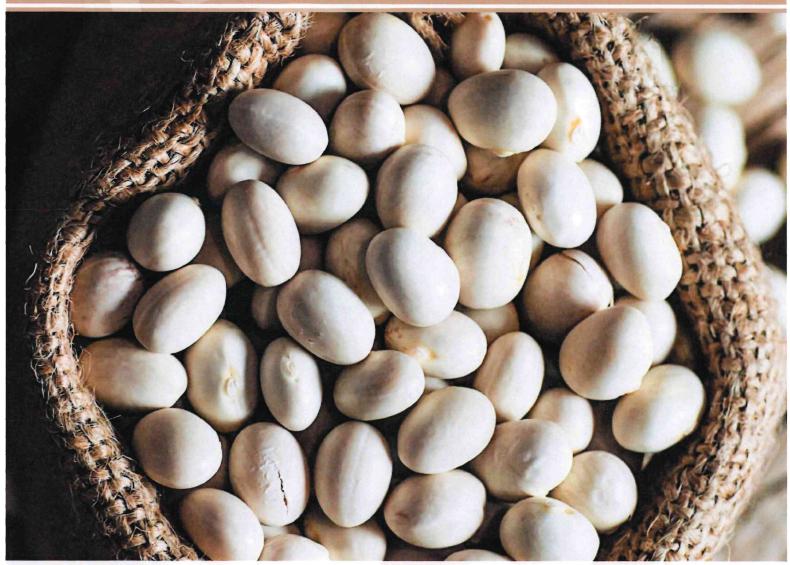
The roundtable concluded with a shared call to action: strengthen binational cooperation, invest in physical and digital infrastructure, and formalize operational standards that match today's trade volumes. The public-private dialogue that began at this session will continue to shape North America's agricultural trade corridor—ensuring it remains competitive, resilient, and responsive to future supply chain needs.

Participants to this meeting included U.S. Grains, U.S Wheat, U.S. Rice, U.S. Soybean U.S. Dry Bean Council, USA Dry Pea and Lentil Council, National Sunflower Association (This last two Rep by Raul Caballero) several Mexican Agricultural Associations that are end users of all these agricultural inputs, SADER, SENASICA, USDA and AMS. The presentations that were given at this event can be downloaded from here Round Table Presentations



USDBC Mexico Report

2025 Mexico App & Social Media May



US Dry Bean Council Representation Office Mexico City Mercalimentos Consultores SC

info@mercalimentos.com

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Latest plublished News

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	Coy Walks Year date Probe 4 - Dates and Debre Wales 1922-1921 Tourning york Control of the Control of Control
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 more is even better. Fig. 1. The state of the state
17/01/25	The New Uses of Beans in the Global Food Service Segment	
27/12/24	USA Beans, Peas, Lentils, Chickpeas Mx- <u>Latam</u> Conference 2025	USA Beans, Peas, Lentils, Chickpeas MX-Latam Conference 25
06/12/24	Beans can help manage your sugar levels, increase energy, and even help prevent certain cancers.	



iTunes Store

May 1st - 31st App Impressions on iTunnes: 1,050 Downloads: 8

IMPRESIONES ?

1,05 mil +22 %



DESCARGAS TOTALES ?

8 -56%



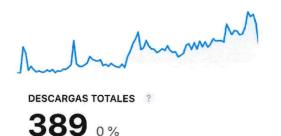
App Life Time Results

App Impressions on iTunnes: 8,650

Downloads: 389

IMPRESIONES ?

8,65 mil 0%





Top Countries

Argentina: 2

United States: 2

Brasil: 1

Costa Rica: 1

Dominican Republic: 1

1

1

Descargas totales por territorio ∨	Ver todo
Argentina	2
Estados Unidos	2
Brasil	1

Costa Rica

República Dominicana

Top Countries

United States: 217

Mexico: 55 Colombia: 10 Costa Rica: 10 South Korea: 8

Descargas totales por territorio >	Ver todo
Estados Unidos	217
México	55
Colombia	10
Costa Rica	10
República de Corea	8



Play Store

May 1st - 31st

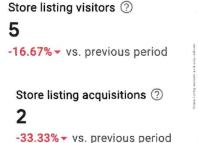
Store listing visitors: 5

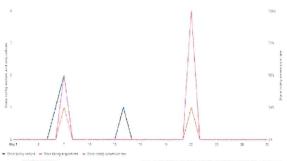
Downloads: 2

Top Countries

Peru: 1

El Salvador: 1





Countries / regions ②

Store listing
Country / region acquisitions

Peru 1

El Salvador 1

All Time (Sep 01 2023 to May 31 2025)

Store listing visitors: 123

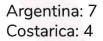
Downloads: 95

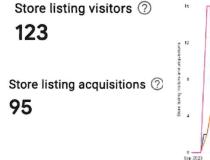
Top Countries

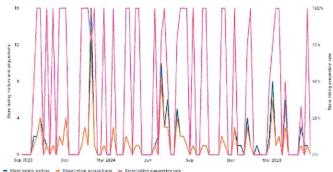
Mexico: 28

United States: 22

Peru: 6







Countries / regions ?	
Country / region	Store listing acquisitions
Mexico	28
United States	22
Argentina	7
Peru	7
El Salvador	5

Total Results (Android & IOS)

May 2025 - Installs: 10

Total all time - Installs: 484



This month, the app users had an increase of 10 new users on both platforms; 8 of them were on iOS and only 2 on Android.

This month, we reached 484 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 published on the USDBC official page. 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. 1,998 emails were sent in Spanish to Latin-American importers, with at least 585 confirmed openers.

Email promoting the USDBC app:



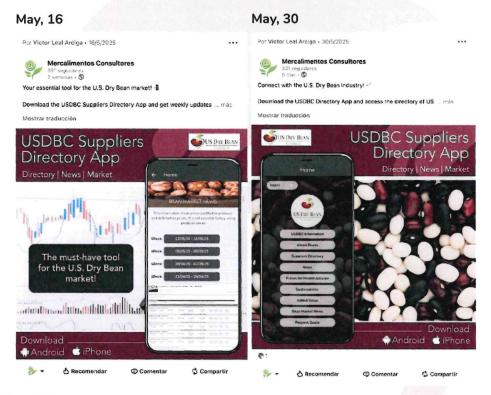
App updates

This month, we deleted 3 records from the directory:
Prusse Sales & Export, LLC - no longer in business
Commodity Specialist Company and KC Trading Company - not members of an association



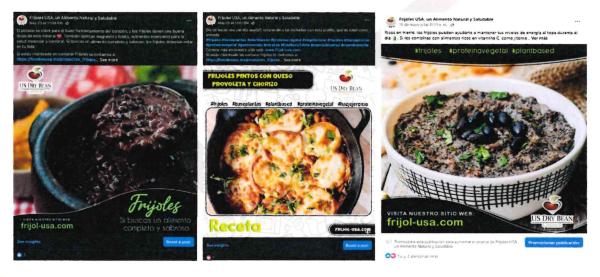
App social media promotion

On May, we continue promoting the app on social media through a couple of posts on Linked In. Over the next months, we will publish at least two promotional posts for the app.



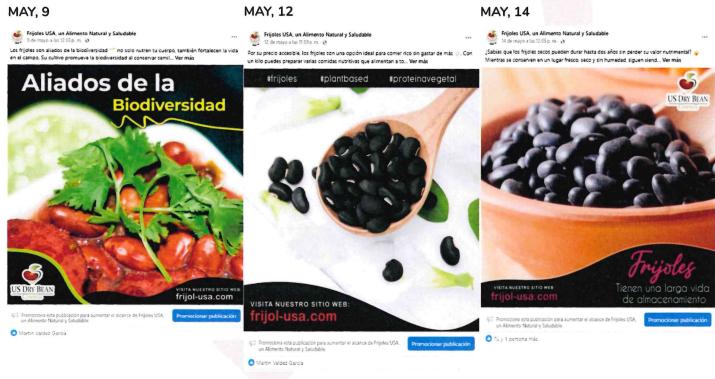
Frijol USA Facebook Posts

On May 2025 we published 15 posts on Facebook

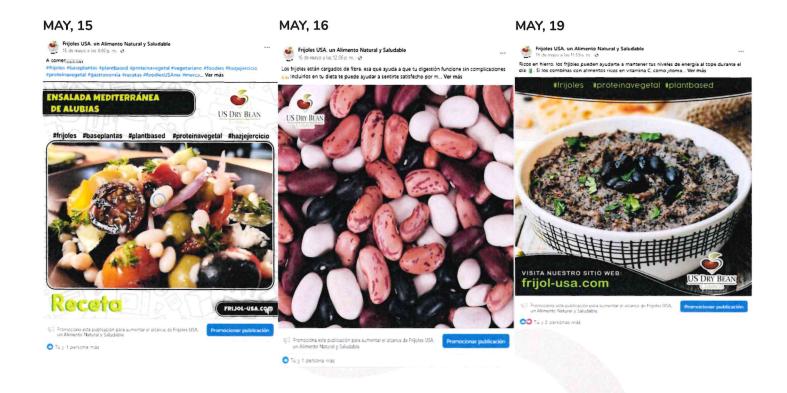


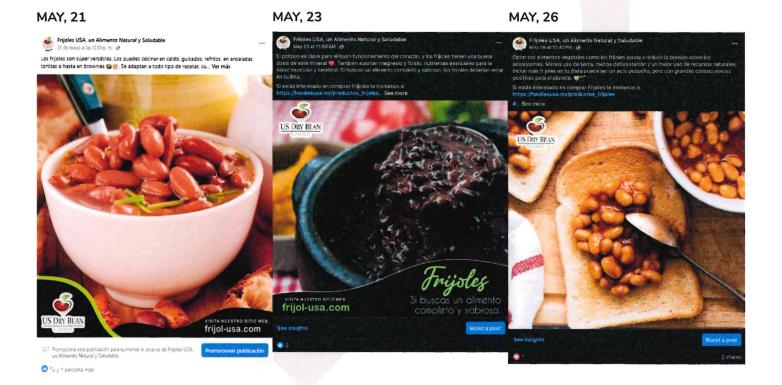














MAY, 28

MAY, 39

MAY, 39

MAY, 30

Project USA, un Alimento Natural y Saudable

Uniform San Comment of Commen

