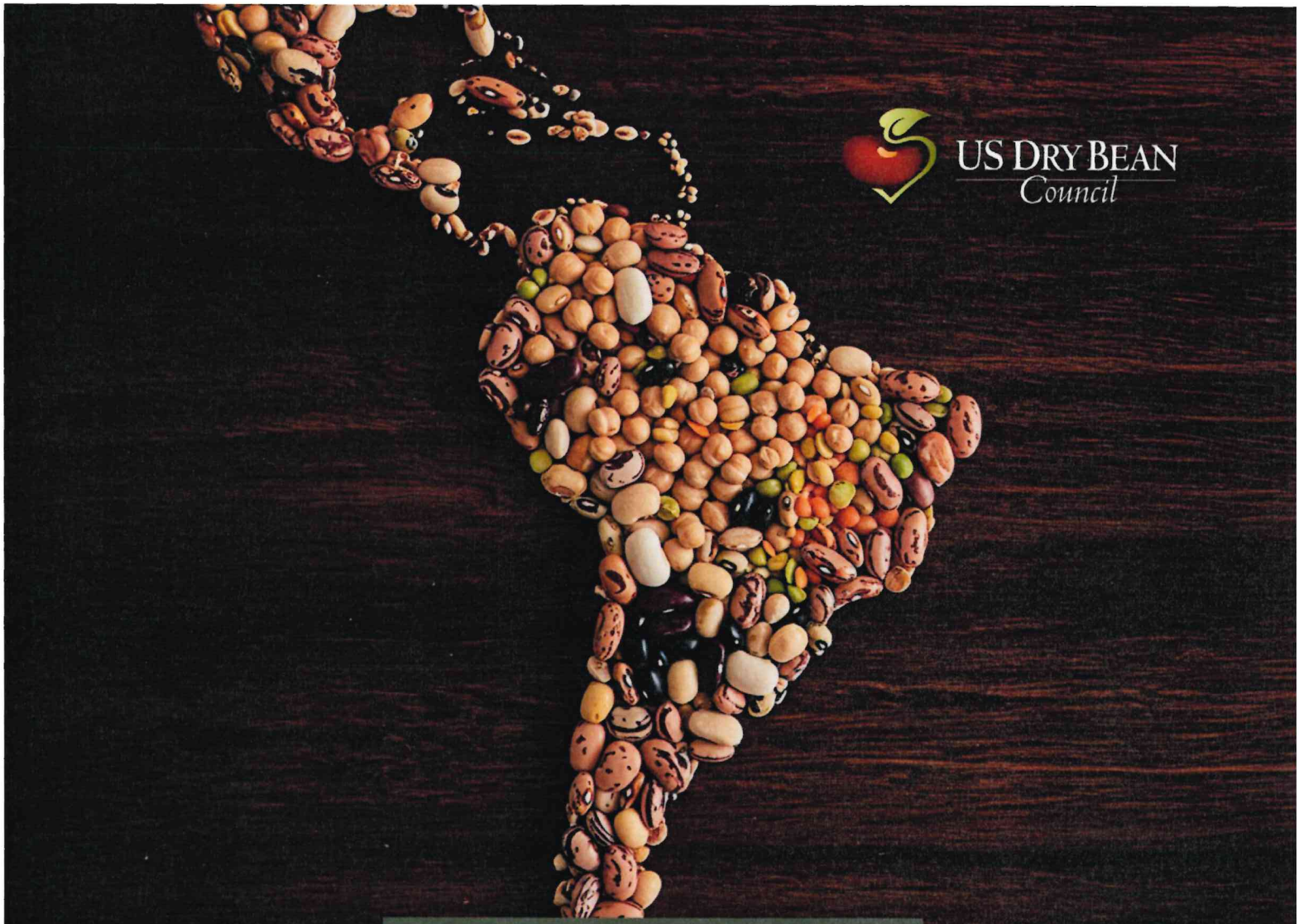

US DRY BEAN Council

Market Report

Central & South America, and the Caribbean Market.

April, 2025

US DRY BEAN Council

This report was developed by the U.S. Dry Bean Council (USDBC) through its Central America, South America, and Caribbean representation office and is intended solely for informational and strategic planning purposes. The content presented herein is based on a combination of primary and secondary research, including proprietary interviews, field-level consultations, and data sourced from public and subscription-based databases such as FAOSTAT, Trade Data Monitor (TDM), and the USDA Global Agricultural Trade System (GATS).

The views and interpretations expressed do not necessarily reflect those of the U.S. Department of Agriculture or any U.S. government agency. Users are encouraged to conduct their own due diligence and consult with appropriate advisors before making commercial, trade, or investment decisions based on this report.

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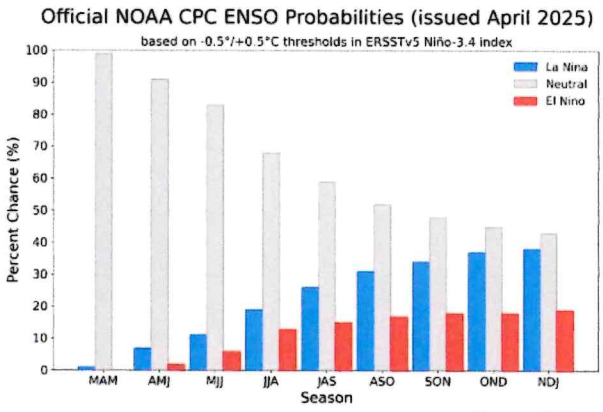
EXECUTIVE SUMMARY

WEATHER UPDATE:

According to the most recent NOAA updates, La Niña conditions have ended, and the equatorial Pacific is now in an ENSO-neutral state. For the Northern Hemisphere summer (June–August 2025), ENSO-neutral conditions are favored with a probability of greater than 50%. This trend is expected to continue through August–October 2025.

Looking ahead to late 2025, forecasts suggest a 38% chance of La Niña redeveloping during November 2025–January 2026, while ENSO-neutral remains the most likely scenario with a 43 % probability during this period.[1]

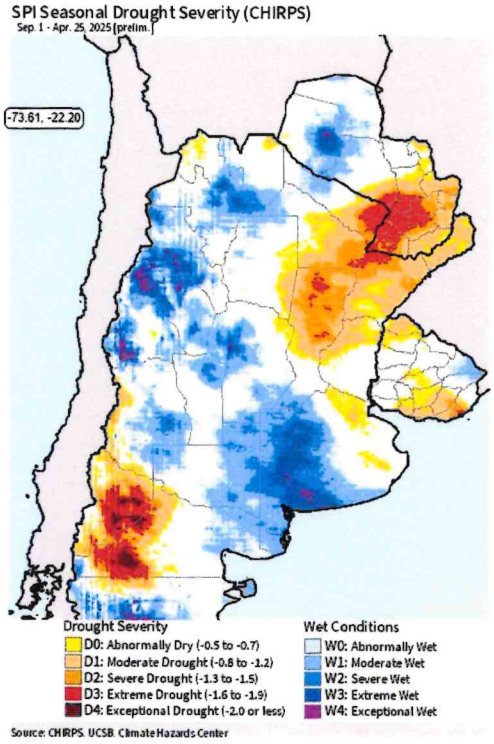
FIGURE 1. *Oficial NOAA CPC*



Source: NOAA

ARGENTINA:

During the first half of April, rainfall of varying intensity was recorded in northern Argentina and production areas of the NOA, benefiting especially replanted plots and improving soil moisture in regions that had suffered water stress and high temperatures at the start of the cycle. However, in Tucumán, concerns persist about the risk of early frosts, which could impact the final yield of the crop. In Santiago del Estero, recent rainfall has favored growth, although replanted plots show better prospects than those affected by previous adverse conditions.



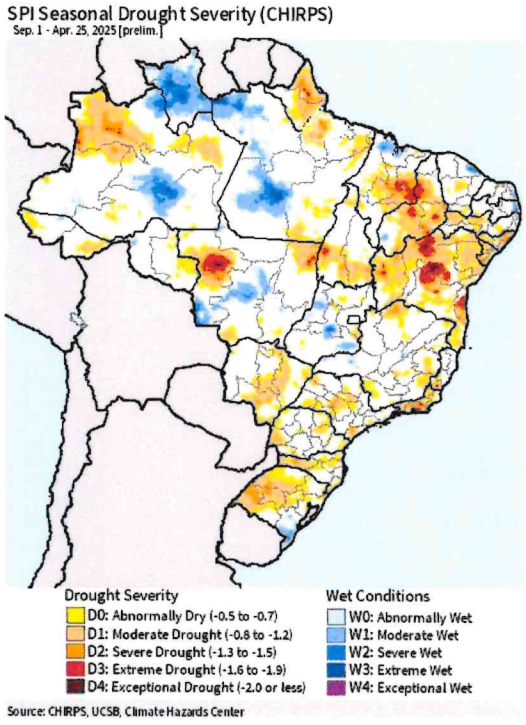
Source: FAS Crop Explorer

1 https://www.cpc.ncep.noaa.gov/products/analysis_monitoring/enso_advisory/ensodisc.sht

EXECUTIVE SUMMARY

BRAZIL:

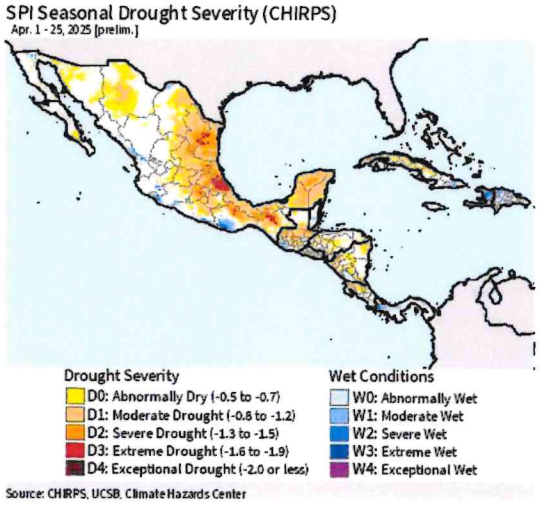
Total bean production in Brazil, summing the three crop cycles, is expected to reach 3.3 million tons, 2.1% higher than in 2023/24. For the first crop, production is estimated at 1.1 million tons, with harvest underway and reaching 77 % in early April. The second crop, still being planted, has fields ranging from germination to grain filling, and the third crop will see planting intensify from May onward. Some regions, such as Santa Catarina and Rio Grande do Sul, managed to harvest high-quality beans, although quality issues in several bean varieties have driven prices upward. By the end of March, 65 % of the area for the first harvest of 2025 had been collected in Brazil. Beans are crucial for Brazilian agriculture, given their importance in human nutrition and as a staple in the Brazilian diet, especially paired with rice. Beans are produced in all five regions and nearly every state, with three main groups: colored common beans, black common beans, and cowpea.



Source: FAS Crop Explorer

NICARAGUA:

Prices of red beans are declining, considering that this is the largest of their three harvests. These prices are lower than those seen last year, when the price was approximately 2 dollars per kilogram. Currently, export prices to neighboring markets are approximately USD 1.4 per kilogram.



Source: FAS Crop Explorer

1 ANALYSIS METHODOLOGY
PERIOD 2019 - 2024

This analysis of dry bean market dynamics in Central America, South America, and the Caribbean was structured through the identification and selection of tariff codes relevant to the U.S. market, enabling the tracking and interpretation of international trade flows for dry bean market in LATAMsi me . Our research methodology is led by a multidisciplinary team of analysts who conduct in-depth data collection and analysis using both primary and secondary sources. Core data inputs include publicly available and subscription-based databases—such as FAOSTAT, Trade Data Monitor (TDM), and the USDA Global Agricultural Trade System (GATS)—which allow us to quantify trade flows, pricing trends, consumption patterns, and production statistics with a high degree of precision. This robust, data-driven foundation ensures the reliability and strategic relevance of our findings.

In addition, we incorporate qualitative research techniques, such as in-depth interviews and field-level consultations with key dry bean stakeholders—including buyers, farmers, distributors, brokers, researchers, and policymakers. These conversations provide critical context and uncover on-the-ground insights that are often not captured through quantitative means alone.

Each data point is systematically cross-verified with local stakeholders to ensure accuracy, relevance, and cultural context. This validation process enhances the credibility of our findings and enables us to deliver a holistic market assessment that reflects both macroeconomic trends and micro-level dynamics.

In the case of USDA GATS, specific dry bean tariff codes were selected, covering varieties such as red beans, navy beans, kidney beans, pink beans, black beans, pinto beans, among others. For chickpeas, code 07132000 was used . In Trade Data Monitor (TDM), the analysis focused on the aggregated codes 071332, 071333, 071339, and 071320, providing a broader overview of commercial trade patterns.

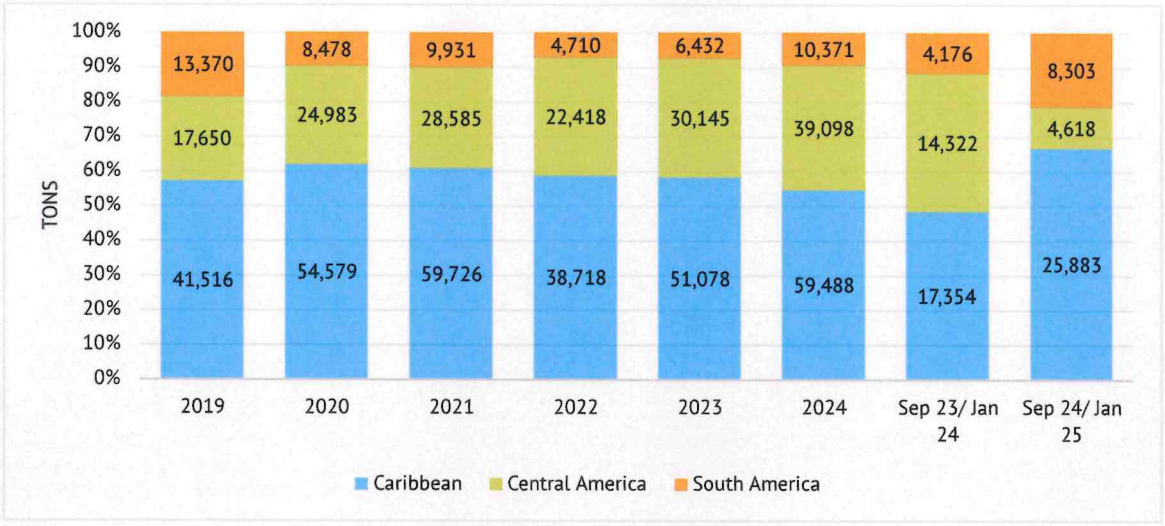
The analysis covers the annual cycles from 2019 to 2024 (September–August), initially focusing on determining U.S. exports to key countries of interest. For 2025, data includes the period from September to January or the most recent information available. Subsequently, additional estimates were made for certain countries and their domestic production (based on FAO data) to construct a food self-sufficiency indicator. Key competitors, such as Brazil and Argentina, were analyzed to understand their roles within the system as the main competitors or substitutes for U.S. exports amid the ongoing trade war.

2 EXPORTS BY REGION: VOLUME AND MARKET SHARE

According to the data, exports to these regions showed significant growth, rising from 72,535 metric tons in 2019 to 108,956 metric tons in 2024—a 50% increase over the period.

Furthermore, when comparing September 2024–January 2025 to the same period in the previous year, exports to South America, Central America and the Caribbean saw substantial increases of 99% and 49%, respectively, while exports to Central America declined by 68%.

FIGURE 2. *US Dry Bean No table of figures entries found. to South & Central America & Caribbean Sep/Aug.*

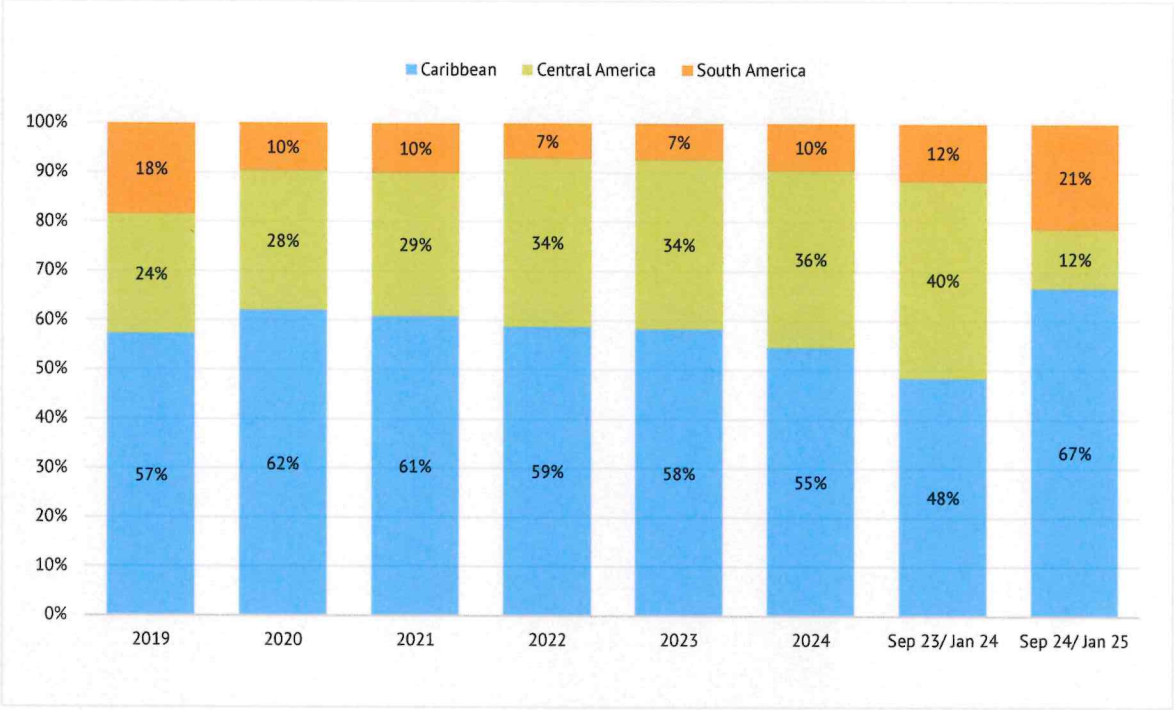


Source: USDA – GATS

When analyzing the complete periods, the Caribbean remains the leading regional destination, receiving 59,488 metric tons in 2024 (55% of the total), although its share has declined from the 62% reached in 2020. Central America shows the most dynamic growth, having doubled its export volumes from 17,650 metric tons in 2019 to 39,098 metric tons in 2024, with its share rising from 24% to 36%. South America, meanwhile, experienced a recovery in 2024 (10,371 metric tons) after two consecutive years of decline, although volumes have not yet returned to the 2019 level (13,370 metric tons).

The data show that while exports to the Caribbean have remained stable, Central America is emerging as a key growth market for U.S. beans. The 2023/24 season set a new record for total export volumes to the region, underscoring the ongoing importance of these markets for the U.S. dry bean industry.

FIGURE 3. Regional Participation Chart: Distribution by South America, Central America, and the Caribbean.



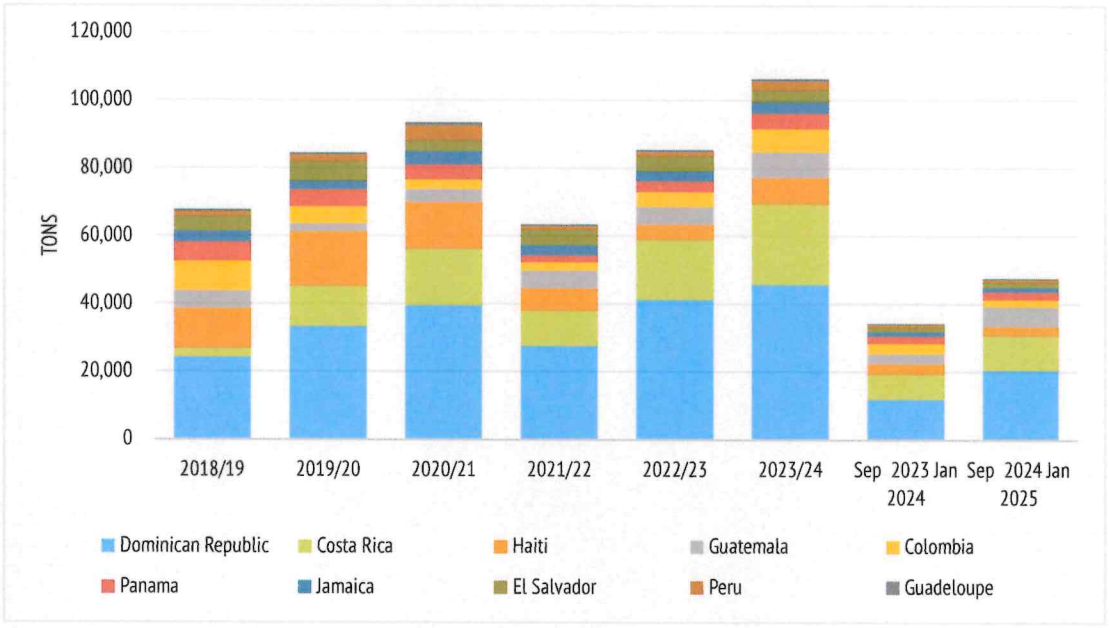
Source: USDA - GATS

In 2024, the United States exported a record 108,956 metric tons of dry beans to its trading partners in Central America, South America, and the Caribbean—a 20% increase over 2023 volumes and continuing a five-year growth trend (+50% since 2019). The Dominican Republic solidified its position as the leading destination, receiving 45,642 metric tons (42% of regional shipments), followed by Costa Rica (23,846 MT), Haiti (7,838 MT), Guatemala (7,264 MT), and Colombia (7,115 MT). These five markets accounted for 88% of total U.S. dry bean exports to the region.

Not all the news is positive, the outlook for 2024/25 is concerning. There is a marked decline compared to the same period last year, particularly in Central America, where U.S. beans appear to be losing market share. While it remains to be seen how the rest of the year will unfold, Nicaragua has been gaining ground, increasing its exports to neighboring countries and consolidating its position as a key regional supplier. This trend is supported by recent reports highlighting Nicaragua's rising export volumes and the country's ability to meet both domestic demand and a growing share of regional needs, especially as production and trade integration initiatives have strengthened its competitiveness.

2.1 U.S. DRY BEAN EXPORTS TO SOUTH AMERICA, CENTRAL AMERICA, AND THE CARIBBEAN: TOP DESTINATIONS (METRIC TONS):

FIGURE 4. *Leading Destinations for Dry Bean Exports: 2019–2024 and Sep 2024–Jan 2025 (MT)).*



Source: USDA – GATS

U.S. dry bean exports to Latin America and the Caribbean have experienced notable shifts between 2018/19 and early 2025. The Dominican Republic and Costa Rica have shown sustained and robust growth in demand, with the Dominican Republic reaching a record 45,642 metric tons in 2023/24 and further surging by 73.1% to 20,481 MT in the September 2024–January 2025 period compared to the same months the previous year. Costa Rica also posted a significant increase, with exports rising from 23,846 MT in 2023/24 to 10,238 MT in the first five months of 2024/25, a 35.4% year-on-year growth.

Guatemala stands out with a remarkable 97.4% increase in imports during September 2024–January 2025, consolidating its position as a key growth market. In contrast, Haiti, once a leading destination with over 16,000 MT in 2020/21, has seen a persistent decline, dropping to 7,838 MT in 2023/24 and decreasing by 9.2% in early 2024/25, likely reflecting ongoing economic challenges.

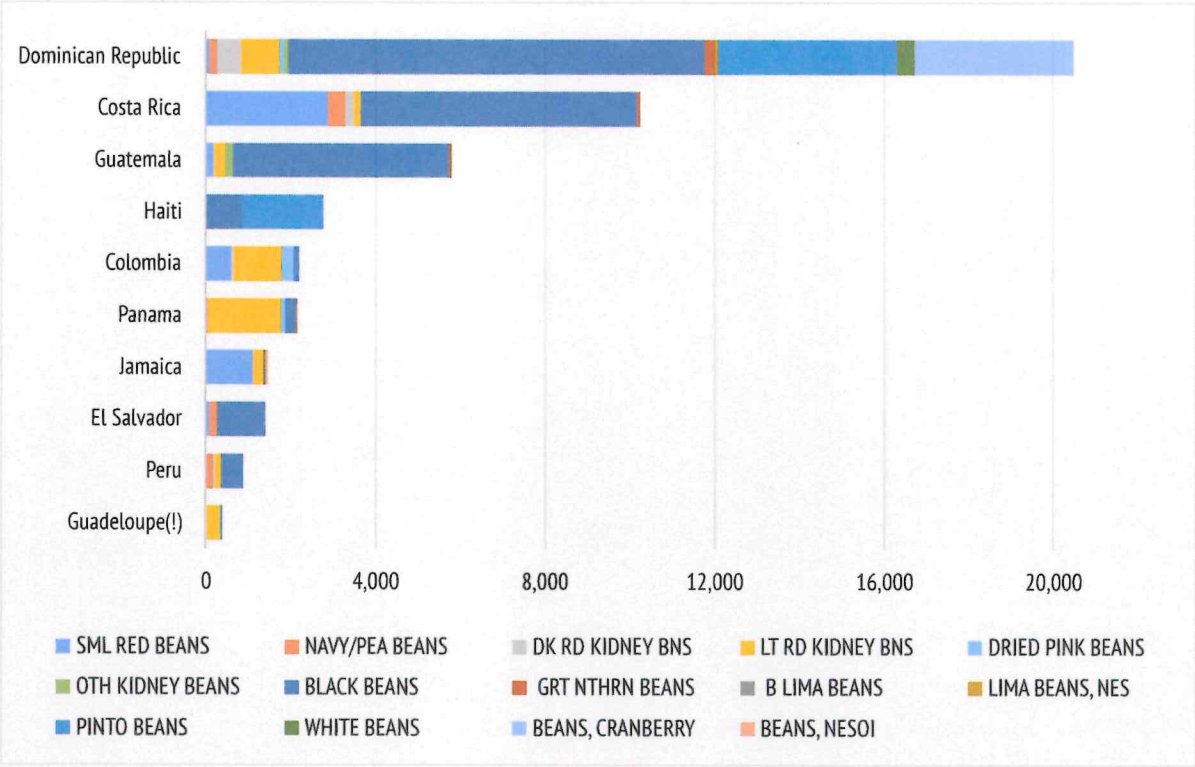
Colombia, after a modest recovery in 2023/24, experienced a 28.2% decrease in imports in the most recent period, suggesting possible market saturation or increased competition from alternative suppliers. Meanwhile, Panama and Jamaica have maintained relatively stable import volumes, with only minor fluctuations, indicating steady but limited market dynamics.

El Salvador and Peru have shown a downward trend in U.S. dry bean imports over the years, pointing to either increased local production, changes in consumer preferences, or heightened competition from other exporters.

VOLUME AND MARKET SHARE

Overall, these data reveal a clear reconfiguration of regional demand. The strongest growth is concentrated in countries with expanding import capacity and less competition from other suppliers, while other markets are either stabilizing or declining due to economic constraints or evolving trade dynamics. The Dominican Republic, Costa Rica, and Guatemala now stand out as the principal drivers of U.S. dry bean export growth in the region.

FIGURE 5. *US Dry Bean Exports, by bean type (Sep2024 - Jan 2025, MT)*



Source: USDA - GATS

U.S. dry bean exports (September–January) show that black beans dominate in the Dominican Republic, Costa Rica, and Guatemala, while pinto and light red kidney beans stand out in Panama and Colombia. Haiti prefers pink beans, and Jamaica mainly imports small red beans. Both Costa Rica and the Dominican Republic import a wide range of varieties, reflecting distinct regional preferences and differentiated commercial strategies.

3. BRAZIL

3.1
TOTAL, BRAZILIAN BEAN EXPORTS
in the Period (2019/2024) (September 2023 to January 2024 / September 2024 to January 2025)

Brazilian bean exports have shown a volatile trend over recent years. There was a sharp decline from 83,477 metric tons in 2019–2020 to 44,898 metric tons in 2022–2023, likely reflecting climatic challenges, reduced competitiveness, or shifts in international demand. However, in 2023–2024, exports experienced an exceptional rebound, reaching 106,216 metric tons—surpassing even the initial levels of the period. This recovery may be attributed to improved harvests, the opening of new markets, or adjustments in trade policies. The pronounced fluctuations highlight the sector's vulnerability to external factors and underscore the need for stable strategies to consolidate long-term growth.

FIGURE 6. *Brazilian Bean Exports in the Period (2019/2024)*

Source: Trade Data Monitor

BRAZIL

TABLE 1 *Variation in Brazilian exports Sep 23/Jan 24 – Sep 24/Jan 25*

	September	October	November	December	January	Total
Sep. 23/Jan 24	9,264	6,016	5,638	12,935	2,275	36,128
Sep. 2024/Jan 25	34,647	21,766	18,878	14,757	16,911	106,959
	274.00%	**261.78%**	**234.82%**	**14.09%**	**643.40%**	

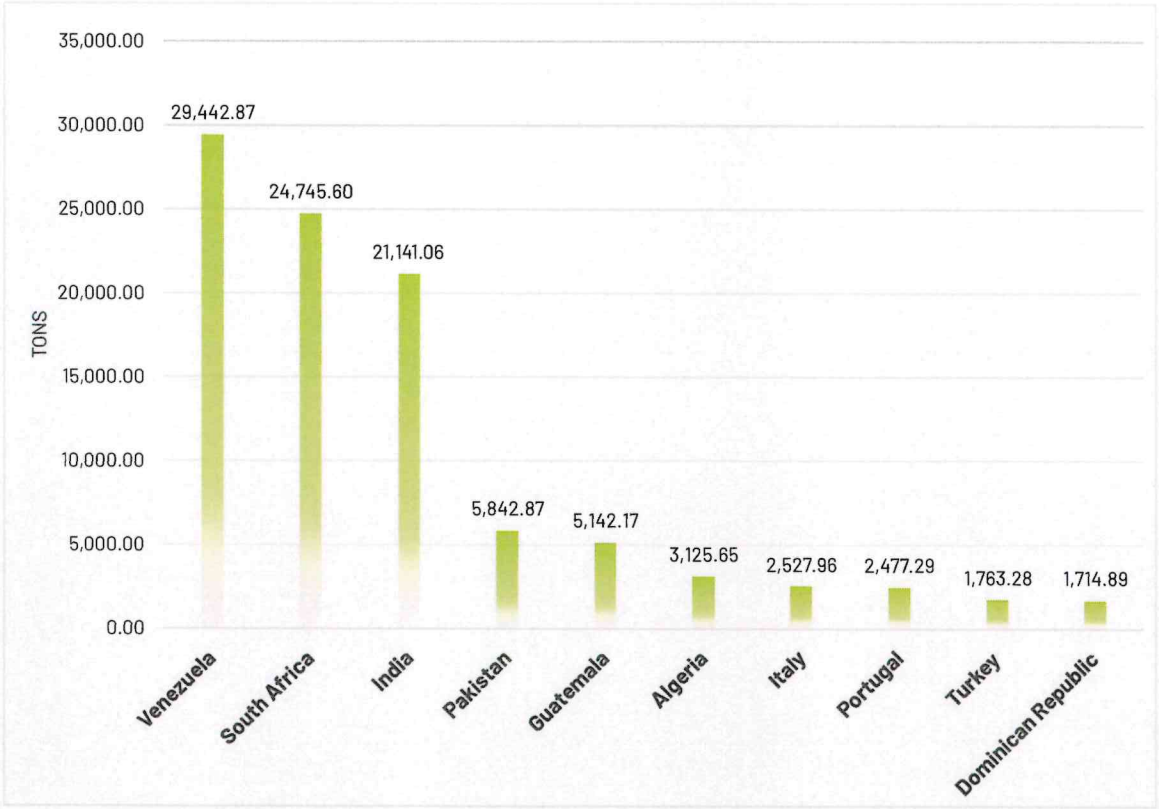
Source: Trade Data Monitor

Brazil's total exports showed significant variation between the periods September 2023–January 2024 and September 2024–January 2025, with exponential growth observed in most of the months analyzed. The most striking increase occurred in January, with exports rising by 643.40%, from 2,275 metric tons in 2024 to 16,911 metric tons in 2025. This surge may be attributed to higher seasonal demand, the opening of new markets, or changes in commodity prices. However, December registered a much more modest variation (+14.09%), possibly due to logistical factors, lower shipments, or comparison with an unusually high December 2023. Overall, the data reveal remarkable dynamism in Brazilian exports, with the exception of December, which warrants further analysis to understand its relatively weak performance.

BRAZIL

3.2
MAIN MARKETS

FIGURE 7. *Top Main Markets (September 2024 - January 2025)*



Source: Trade Data Monitor

During this period, the most representative markets for Brazilian beans were countries in Latin America, followed by several African and Asian nations. This export orientation reflects Brazil's strategic focus on regions where its beans face less competition and regulatory obstacles.

3.3

PLANTED AREA

TABLE 2 *Total, Supply of Dry Beans in Brazil*

Harvest period	Initial Stock (thousand tons)	Production (thousand tons)	Imports (thousand tons)	Total Supply (thousand tons)
2019/2020	260	3,222	114	3,595
2020/2021	269	2,894	83	3,246
2021/2022	128	2,990	76	3,194
2022/2023	208	3,037	69	3,314
2023/2024	325	3,244	22	3,592
2024/2025	198	3,294	50	3,542

CONAB, SECEX, IBGE

Beans are considered agronomically attractive due to their short phenological cycle, which enables producers to incorporate them into narrow planting windows without affecting the cultivation of other grains during the same year. Brazil has three distinct planting seasons that ensure a consistent supply throughout the year: the first crop (August–December), second crop (January–April), and third crop (May–July).

First Crop Beans 2024/25

For the 2024/25 season, the first crop covered a planted area of 905,000 hectares, an increase of 5.1% compared to the previous season. The yield improved by 6.9%, reaching 1,170 kg/ha, and production rose by 12.4%, totaling 1,058,800 tons. Harvesting for the first crop is almost complete in many states, where dry weather in March facilitated grain maturation and harvest. However, regions such as Bahia, Santa Catarina, and Rio Grande do Sul are still finishing their harvests. In Bahia, planting and harvesting schedules were delayed due to weather conditions that required replanting, while in the South, higher-altitude crops follow the usual schedule after winter cereals are harvested.

BRAZIL

Colored Common Beans

In **Minas Gerais**, the harvest concluded in March, with lower production compared to the previous year due to a smaller planted area caused by less attractive bean prices relative to soy and corn, as well as higher climate risks. Nonetheless, yields improved thanks to favorable weather during planting and development stages. In **Bahia**, rainfall returned but was irregular, negatively impacting productive potential and causing delays and replanting. **Goiás** experienced better outcomes, with harvest completed in February, production exceeding expectations due to an increased area, better yields, and improved planting conditions. In **Paraná**, the harvest concluded in February, with higher yields and planted area compared to the previous year. **Santa Catarina's** harvest is nearly finished, though late areas were affected by climatic variability. **Rio Grande do Sul** is just beginning its harvest, showing satisfactory yields slightly below last year's. In the **Distrito Federal,** the harvest achieved good average yields. In **Mato Grosso**, March rainfall aided later crops, though average yields are expected to decrease due to the expanded area.

Black Common Beans

Paraná concluded its black bean harvest in March, with improvements in both area and yield compared to the prior season. **Santa Catarina's** harvest is almost complete, but late areas show reduced potential due to adverse weather conditions. **Rio Grande do Sul** has advanced its harvest, although certain late areas remain in the field. **Minas Gerais** saw lower production due to reduced acreage, yet yields were higher.

Cowpea

In **Piauí**, planting faced delays from irregular rains; however, conditions are favorable in the northern and southwestern regions, while critical in the southeast due to drought. In **Bahia**, rainfall improved drought-stressed areas, although losses occurred in certain central regions. **Maranhão** is nearing completion of its harvest, with good development and slightly increased productivity. Harvests in **Minas Gerais** and **Tocantins** were satisfactory, though production was reduced in Minas Gerais due to a smaller planted area. In **Mato Grosso**, January rains negatively affected yields but compensated with a larger area. **Pernambuco** saw crop development range from fair to good under irregular rains, better than last season.

Second Crop Beans 2024/25

The second crop season covered 1,463,800 hectares, a reduction of 4.2% compared to the previous year. Yields rose by 1.8%, reaching 1,008 kg/ha, but overall production decreased by 2.5%, totaling 1,475,100 tons. In **Paraná**, dry and hot weather hampered development, while a significant area shifted to corn due to more stable prices and higher demand in biofuel and feed sectors. **Minas Gerais** encountered slow planting due to scarce rains and high temperatures, leading producers to reconsider bean planting. **Paraíba** has begun planting, delayed by irregular rains and insufficient seed distribution. **Santa Catarina** faced unfavorable weather, lowering potential yields. **Mato Grosso** showed early good development due to rainfall, while **Mato Grosso do Sul** reduced planted areas due to lower profitability of beans relative to other crops.

Black Common Beans

Paraná's planting nearly concluded but saw significant area reductions as corn replaced beans. **Santa Catarina's** planted area diminished due to adverse weather and low market prices, while **Rio Grande do Sul's** planting finished in March, hindered by low soil water storage.

Cowpea

Planting progressed across **Ceará, Bahia,** and **Rio Grande do Norte**, where weather and market incentives boosted areas planted. Early vigor was noted in **Mato Grosso**, with favorable development in **Goiás** and **Maranhão.**

Third Crop Beans 2024/25

The third crop is planned to cover 492,800 hectares, an increase of 4.8%, with planting set to start in May 2025. However, yield is expected to decline by 5.9%, resulting in 778,900 tons of production.

Supply, Demand, and Market Trends

In São Paulo's wholesale market, March ended with rising prices for high-quality beans, reflecting their scarcity. Some buyers opted for lower grades due to limited supply and elevated costs. In **Paraná**, the safrinha harvest is concentrated in May and June, but production is expected to decline by 2.5% due to low prices. In **Minas Gerais**, irregular rainfall continues to challenge crop performance, raising concerns about productivity. **Black beans** face downward price pressures due to high supply and low liquidity, particularly in Paraná, where production surged by over 110% compared to 2024.

The harvest of the second dry bean crop in **Paraná** has begun, increasing from 1% to 3% of the planted area, which is estimated at 332,000 hectares. Although the cultivated area has decreased by 24% compared to the second crop of 2024, this still significantly surpasses the area of the first crop, which concluded in March with 166,000 hectares. The production volumes of this second crop are expected to be higher compared to the 339,200 tons produced in the first quarter with the "waters crop." By the end of March, production estimates reached 610,600 tons, although concerns about the dry and warm weather persisted. With the beginning of the harvest, these concerns were confirmed, as the rainfall has not been sufficient to improve the situation. This has affected crop quality, reducing the percentage of areas in good condition and increasing those in average and poor conditions.

Despite production challenges, the progression of the harvest is expected to exert further pressure on prices, which had already dropped in January, particularly for black beans. This product has gained ground over carioca beans in Paraná's fields, with prices registering lower than those of April 2024. On the other hand, carioca beans, with limited supply in the state, are seeing purchase intentions at higher prices, especially after the significant price increases observed in recent days. In the coming days, the market will evaluate the prices of this bean, which currently shows a notable difference from black beans.

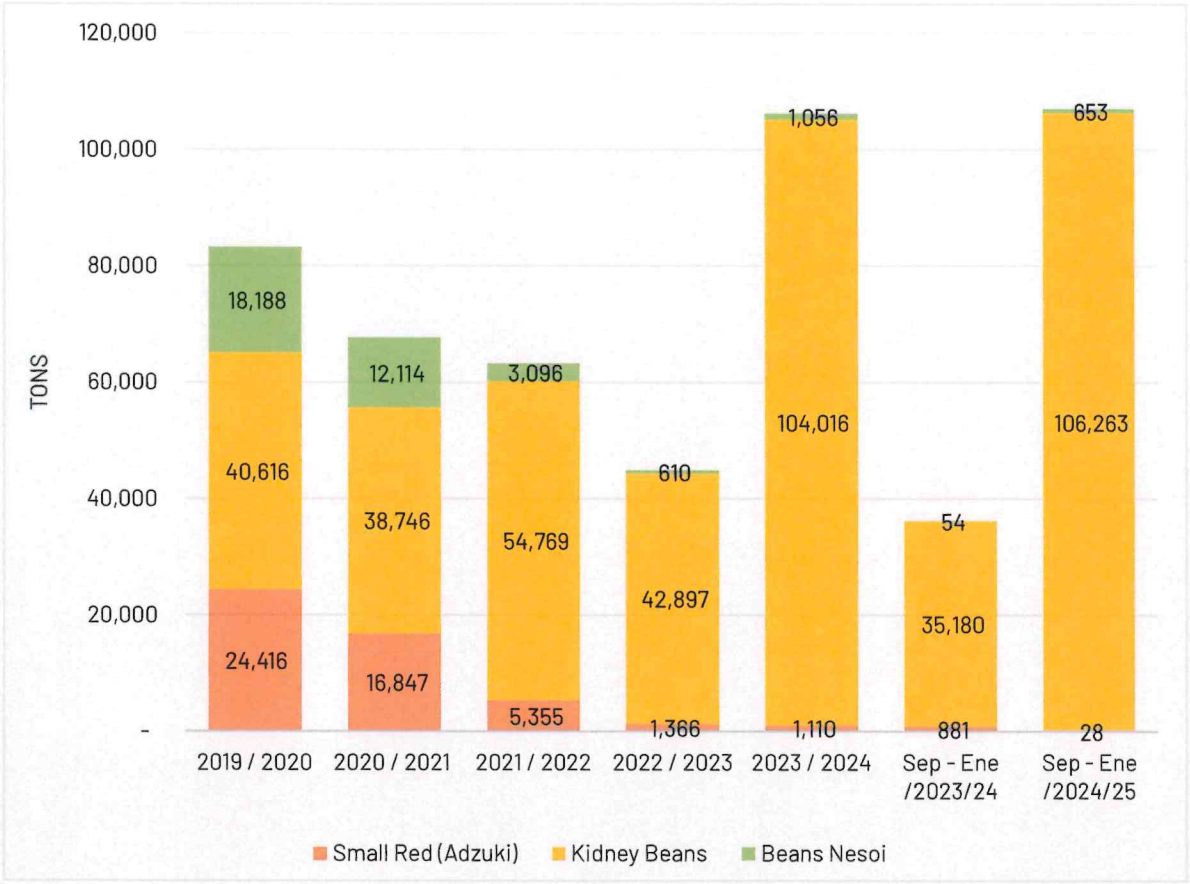
Finally, local concerns over prices are compounded by potential effects of the trade war between China and the United States. Brazil has recently exported significant volumes of beans to countries like Mexico and Venezuela. Particularly in the case of Mexico, the main trade partner of the United States, significant changes in production may occur, as well as exchange rate fluctuations.[1]

1 Secretary of Agriculture and Supply of Paraná - Conjunctural Bulletin Week 15/2025 – April 10, 2025

BRAZIL

3.4
EXPORTS OF DRIED BEANS

FIGURE 8. Exports of Brazil Sept -Aug



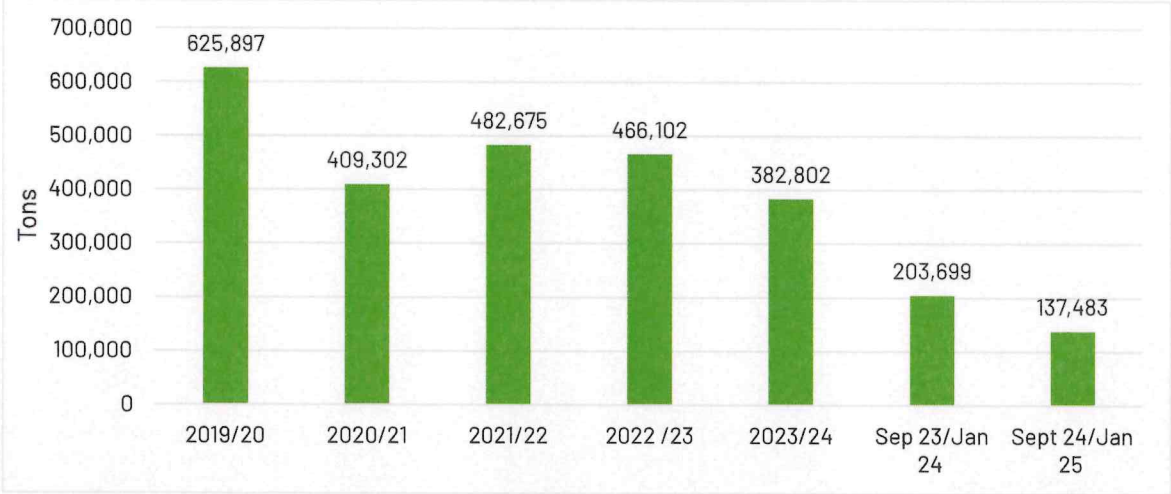
Source: Trade Data Monitor

Kidney Beans dominated exports, with growth of 156% (from 40,616 tons in 2019/20 to 104,016 tons in 2023/24), consolidating its position as the most important variety. In contrast, Small Red/Adzuki and Beans Nesoi experienced drastic declines of 95% and 94% respectively over the same period.

4. ARGENTINA

4.1
ARGENTINA TOTAL BEAN EXPORTS
In the period (2019/2024) (September 2023 to January 2024 / September 2024 to January 2025)

FIGURE 9. *Argentina total Bean Exports in the Period (2019/2024)*



Source: Trade Data Monitor

Argentina shows a downward trend, with an initial peak of 625,897 tons (2019–2020) followed by a sustained decline to 382,802 tons in 2023–2024, except for a brief rebound in 2021–2022 (482,675 tons). This 39% reduction is by the influence of climatic issues (notably droughts). Unlike Brazil—which achieved a record recovery in 2023–2024—Argentina has not managed to reverse its decline, highlighting structural challenges in its agricultural sector. While Brazil surpassed its pre-downturn levels (106,216 tons in 2023–2024), Argentina continues a negative trajectory. Brazil has diversified its export markets, whereas Argentina needs to strengthen its competitiveness and adapt to climate shocks to regain its position as an exporter.

ARGENTINA

TABLE 3 *Variation in Argentina exports Sep 23/Jan 24 – Sep 24/Jan 25*

	September	October	November	December	January	Total
Sep. 23/Jan 24	40,779	49,497	46,064	36,669	30,690	203,699
Sep. 2024/Jan 25	48,585	23,556	16,670	28,728	19,944	137,483
	19.14%	-52.41%	-63.81%	-21.66%	-35.01%	

Source: Trade Data Monitor

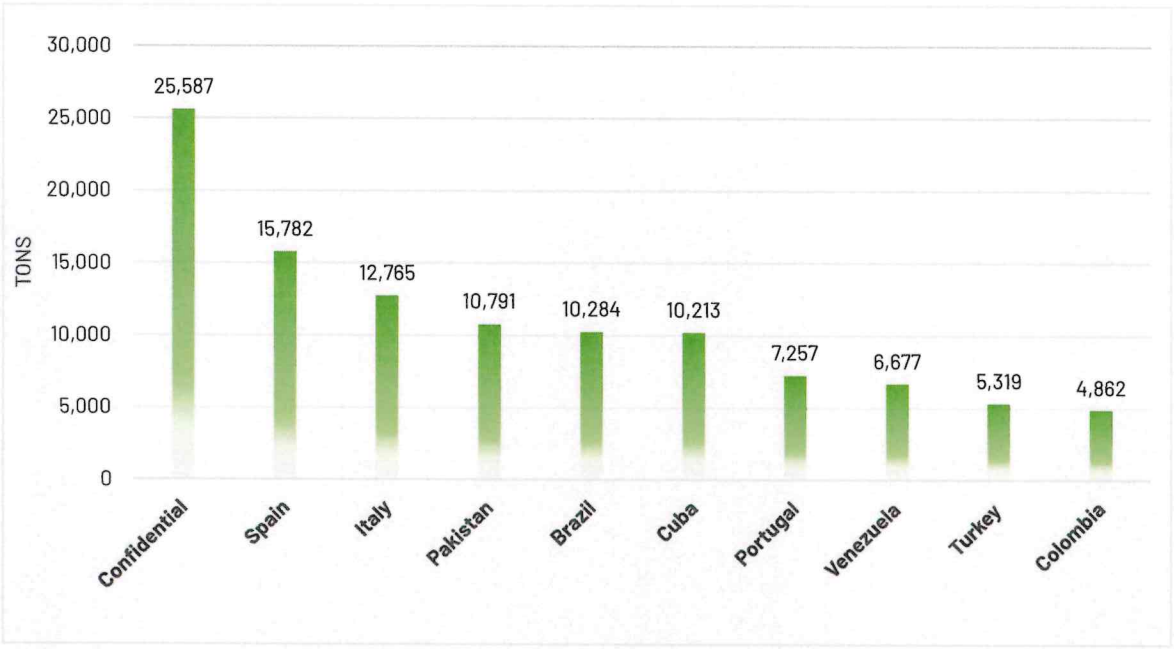
4.2 MAIN MARKETS

According to Trade Data Monitor, Argentine bean exports (September 2024–January 2025) reached an estimated 132,896 metric tons, considering that this figure covers only 80% of the total reported. Of this, 19% (25,587 metric tons) remained classified as confidential data. The main destinations were Spain (15,782 MT), Italy (12,765 MT), and Pakistan (10,791 MT), reflecting strong European and Asian demand.

Brazil (10,284 MT) and Cuba (10,213 MT) led among Latin American markets, while smaller markets such as Venezuela (6,677 MT) and Turkey (5,319 MT) rounded out the export landscape, highlighting clear geographic diversification.

ARGENTINA

FIGURE 10. *Top Main Markets Argentina (September 2024 - January 2025)*



Source: Trade Data Monitor

Argentine bean export data reveal a concentration in three main regional blocs. Europe emerges as the most important market, receiving 35% of the total, with Spain (15,782 tons), Italy (12,765), and Portugal (7,257) as key destinations.

Next in importance is Latin America, accounting for 32% of shipments, where Brazil (10,284), Cuba (10,213), and Venezuela (6,677) show sustained demand, although with lower volumes than European markets. The confidential segment (25,587), representing 26% of the total, prevents a complete analysis but suggests the existence of undisclosed strategic buyers. Asia is represented solely by Pakistan (10,791), which accounts for 11% of exports, while Turkey (5,319) acts as a bridge between Europe and the Middle East, with 5%. Notably, there are no exports to Africa or to major Asian economies such as China and India.

ARGENTINA

4.3 PRODUCTION ARGENTINA

TABLE 4 *Production and yield (Total bean)*

Campaign	Planted Area (ha)	Harvested Area (ha)	Production tons	Yield Ton/ha
2019/20	489,602	488,232	633,823	1.298
2020/21	523,453	523,218	758,750	1.450
2021/22	536,681	535,466	679,744	1.269
2022/23	573,654	572,364	792,564	1.385
2023/24	571,618	565,899	474,764	0.839
2024/25	590,000	590,000	750,000	1.271

Source: Ministry of Economy

The official reports from April 2025 by Argentina's Ministry of Economy show that the cultivation of beans (dry beans) is at a critical stage, with development and harvesting progressing in various production regions of the NOA (Salta, Jujuy, Tucumán, Santiago del Estero).

Crop Conditions and Progress in Planting and Harvesting

In Salta and Jujuy, bean crops are generally in very good condition, transitioning through vegetative and reproductive stages, with adequate water availability in the soil profile.

In Tucumán, the crop has entered the flowering stage, but thermal and water stress experienced at the beginning and the threat of early frosts create uncertainty about its productive potential.

In Santiago del Estero, most plots continue active growth, and replanted crops have benefited from recent rainfall. In the Quimilí area, crops are in the grain-filling stage, although some plots show limitations due to elevated temperatures and lack of previous rainfall, resulting in scarce vegetative development.

Impact of Weather on Planting and Harvesting

April's weather has had a dual effect: on one hand, recent rains have enabled plot recovery and improved soil moisture, which is key for grain filling and the final development of beans. On the other hand, thermal variability and the possibility of early frosts in areas like Tucumán keep uncertainty about the final outcome of the season. Overall, the bean crop is in good condition in most regions, but climatic heterogeneity necessitates constant

ARGENTINA

4.3.1 HARVEST EFFICIENCY

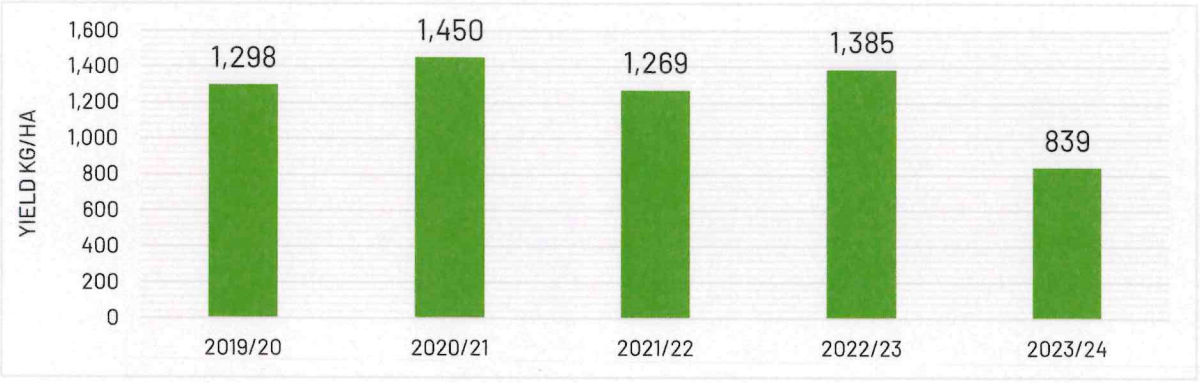
FIGURE 11. *Harvest efficiency 2019/20 - 2023/24*

Source: Ministry of Economy

Argentina maintained high agricultural efficiency (99–100%) between 2019/20 and 2023/24, peaking in 2020/21 at 99.96%. The slight decline in 2023/24 (99%) were by climatic issues. The system demonstrates robustness, but the recent variation warrants monitoring to rule out adverse trends.

4.3.2 HARVEST YIELD

FIGURE 12. *Yield per hectare 2019 -2024*



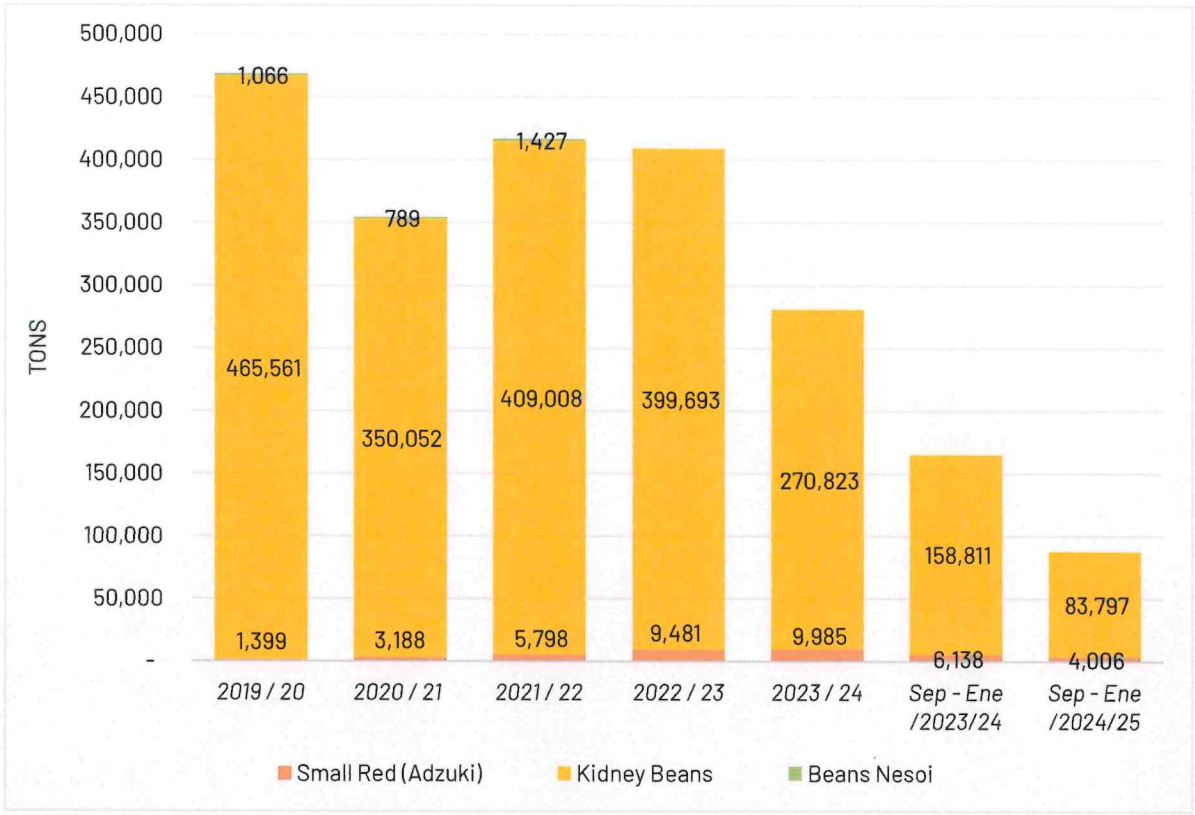
Source: Ministry of Economy

Bean yields in Argentina fluctuated between 1,269 and 1,450 kg/ha from 2019/20 to 2022/23 but dropped sharply in 2023/24 to 839 kg/ha, due to extreme weather events.

ARGENTINA

4.3.4 EXPORTS OF DRIED BEANS

FIGURE 13. *Exports of dried beans 2019 - 2024*



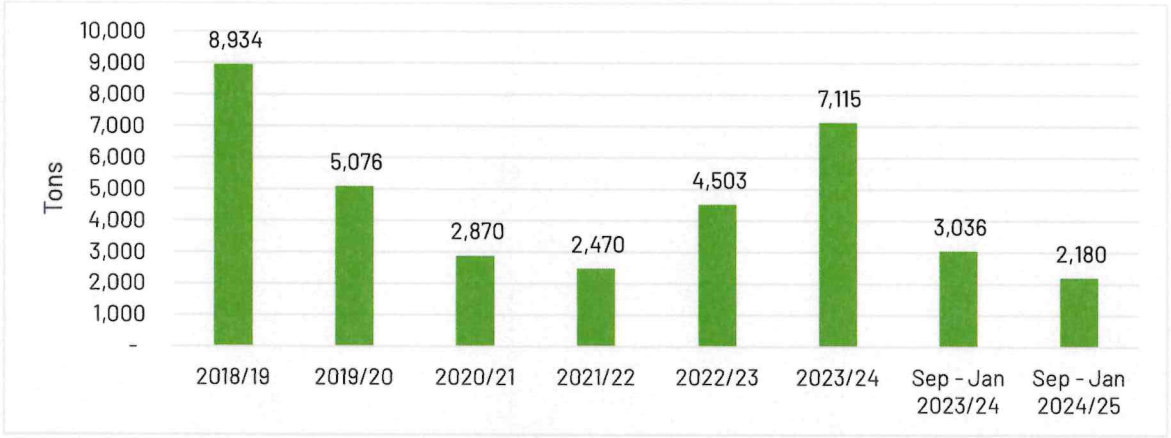
Source: Trade Data Monitor

Kidney Beans was the most exported variety, although it experienced a 42% decline (from 465,561 tons in 2019/20 to 270,823 tons in 2023/24). In contrast, Small Red/Adzuki recorded an explosive increase of 614% (from 1,399 tons to 9,985 tons), becoming the fastest-growing variety. Meanwhile, Beans Nesoi showed volatility, with a peak in 2021/22 (1,427 tons).

5. COLOMBIA

5.1
VOLUME OF DRY BEAN EXPORTS FROM THE UNITED STATES TO COLOMBIA

FIGURE 14. U.S. exports of dried beans to Colombia (2019 / 2024) (Sep - Jan 2024/25)



Source: USDA - GATS

The data show strong volatility in U.S. dry bean exports to Colombia between 2018/19 and 2023/24, with a peak of 8,934 tons and a sharp drop in 2020/21. During the 2020/21 period, global protein prices, including beans rose significantly. In response to these price increases, and given Colombia's challenging economic situation at the time, domestic demand for imported beans contracted noticeably. However, in 2022/23 and 2023/24, as bean prices became more competitive, Colombian imports of U.S. dry beans rebounded, reflecting a renewed demand driven by improved affordability and market conditions. This pattern highlights the sensitivity of Colombian bean imports to international price fluctuations and domestic economic factors. The period from September to January 2025 registered a 28.2% decrease compared to the same period the previous year.

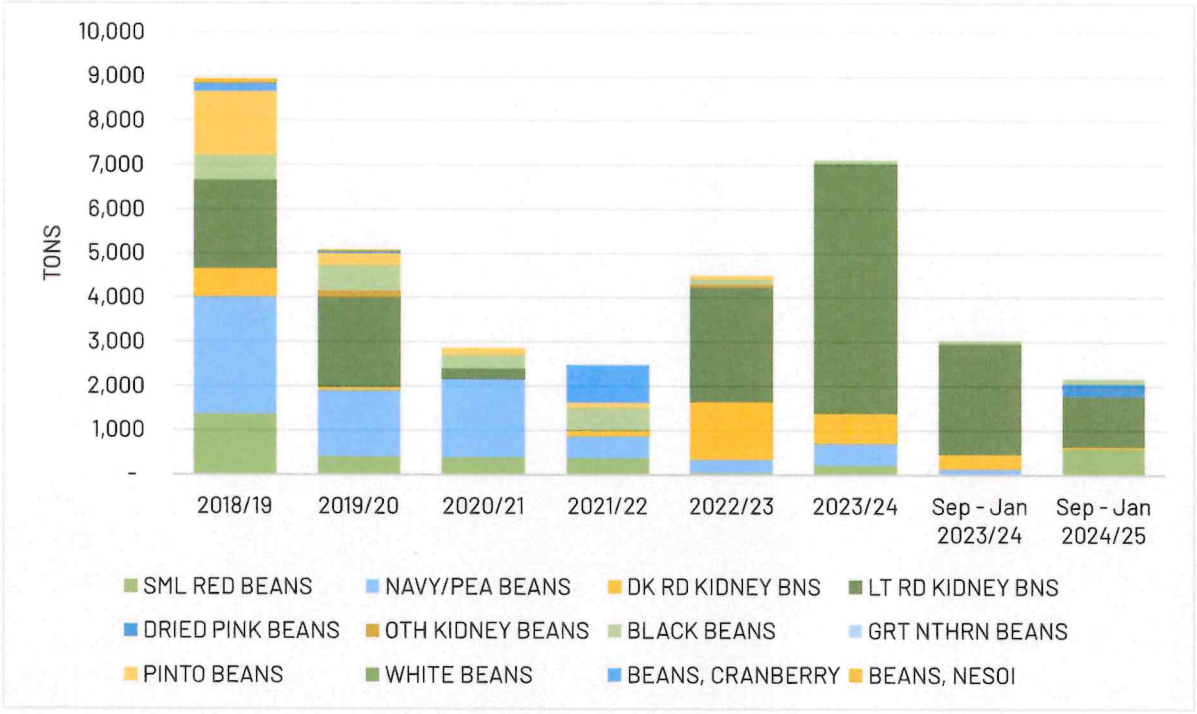
The higher production costs in Colombia do not appear to encourage increased sowing of bean varieties other than cowpea. Additionally, there have been notable shifts in consumer demand toward other bean varieties, such as cowpea, which has become more profitable for Colombian producers and is offered at lower prices compared to imported varieties. These changes in production and market preferences have directly impacted import volumes, leading to the observed decrease in U.S. bean exports to Colombia.

COLOMBIA

5.2

U.S. EXPORTS OF DRIED BEANS TO COLOMBIA (2019 / 2024) (SEP - JAN 2024/25)

FIGURA 15. *U.S. exports of dried beans to Colombia.*



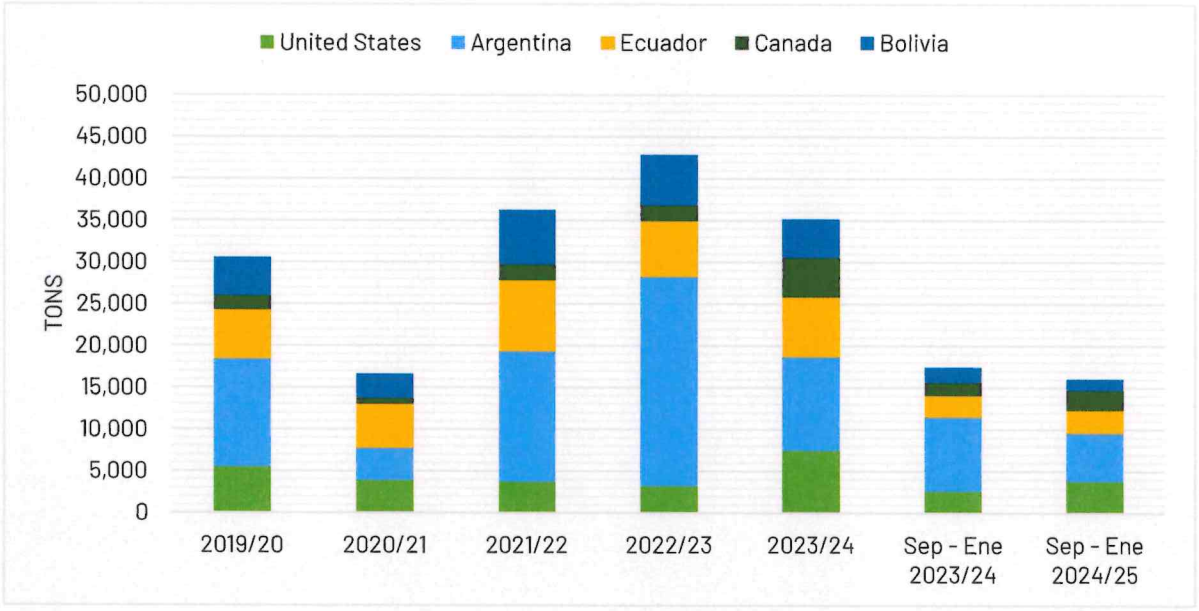
Source: USDA – GATS

Between September–January 2024 and 2025, contrasting trends emerged. Light Red Kidney Beans, while maintaining the highest volume (2,501 vs 1,137 tons), registered a 54.5% decrease. In contrast, Small Red Beans showed remarkable growth, rising from zero exports to 584 tons, while Black Beans increased by 50.6% (from 85 to 128 tons). Notably, Dried Pink Beans appeared for the first time in 2025 with 286 tons, a variety not previously recorded. On the other hand, Navy/Pea Beans disappeared from trade (from 128 to 0 tons), and Dark Red Kidney Beans dropped by 85.8% (from 323 to 46 tons). These variations indicate significant shifts in demand patterns by bean type in the Colombian market.

COLOMBIA

5.3
COLOMBIA DRY BEAN IMPORTS FROM TOP SUPPLIERS (2019-2024) AND VARIATION SEPTEMBER JANUARY 2024/25

FIGURA 16. *Colombia Dry Bean Imports from Top Suppliers*



Source: TDM

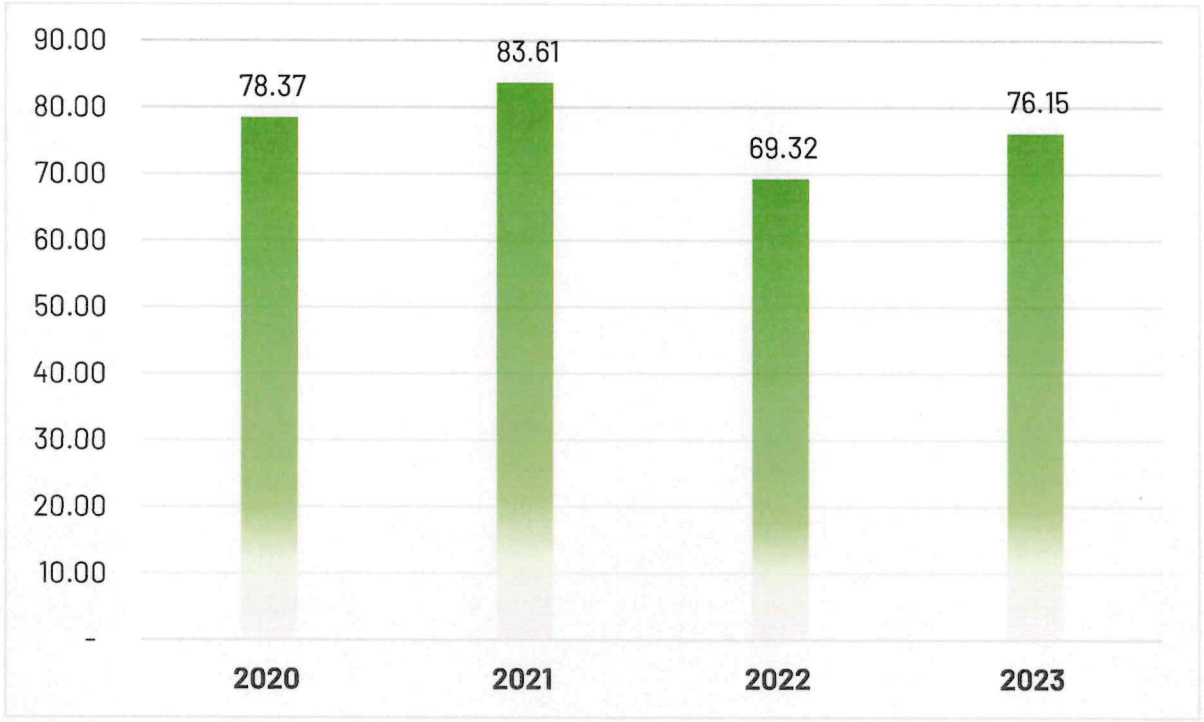
The United States recorded a 46.6% increase in its exports to Colombia, rising from 2,563 to 3,758 tons. Argentina, the main supplier in the previous period (8,871 tons), experienced a 34.8% decline to 5,787 tons. Ecuador showed a slight increase of 4.4% (from 2,611 to 2,725 tons), maintaining a stable market share. Canada experienced significant growth of 60% (from 1,463 to 2,341 tons), standing out as one of the biggest advances. Bolivia reduced its shipments by 28% (from 1,948 to 1,402 tons), continuing its downward trend. The Colombian market is undergoing changes in supplier dynamics, with the U.S. and Canada gaining market share, while Argentina and Bolivia are seeing their presence diminish. This analysis refers to the 2024/25 period.

COLOMBIA

5.4

COLOMBIA FOOD SELF-SUFFICIENCY INDEX

FIGURA 17. *Colombia Food Self-Sufficiency Index (2020 / 2023)*



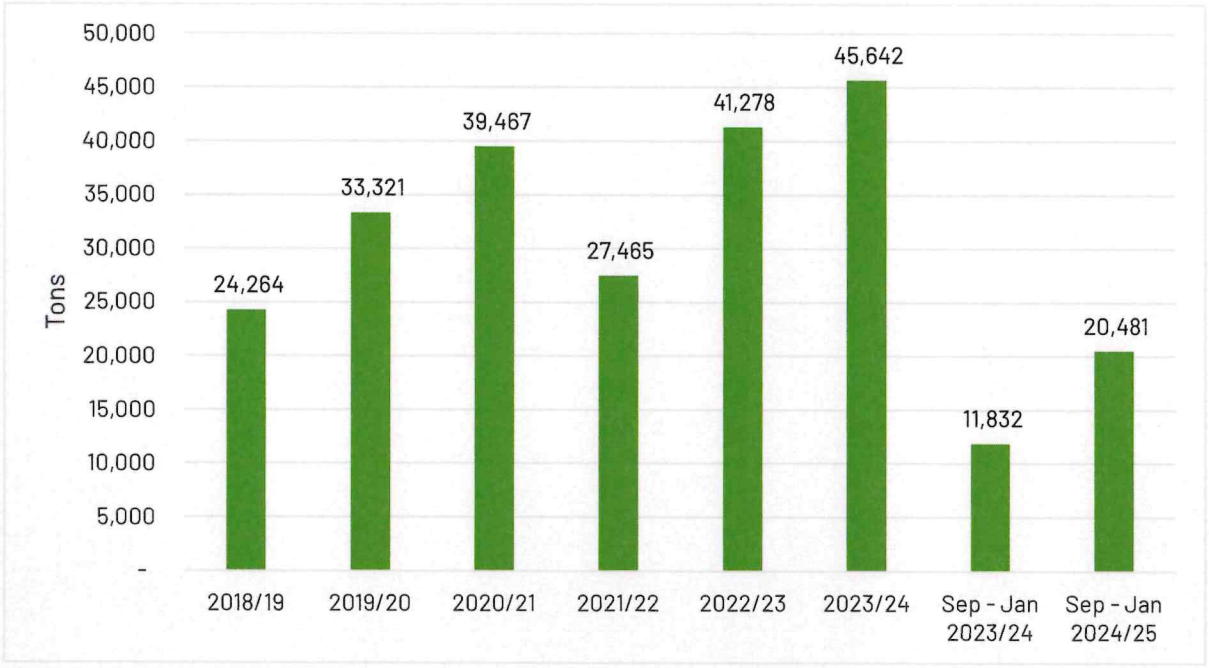
Source: Trade Data Monitor - FAO

After rising from 78.37% in 2020 to 83.61% in 2021, the index experienced a sharp drop to 69.32% in 2022. The initial increases were attributed to the impact of the COVID-19 pandemic and its implications on the international market. In 2022, domestic prices in Colombia remained high, while import costs were roughly half the national price, significantly stimulating imports. Finally, in 2023, the index showed a slight recovery, reaching 76.15%, driven by a decrease in imports.

6. DOMINICAN REPUBLIC

6.1
VOLUME OF DRY BEAN EXPORTS FROM THE UNITED STATES TO DOMINICAN REPUBLIC

FIGURE 18. *U.S. exports of dried beans to Dominican Republic (2019 / 2024) (Sep - Jan 2024/25)*



Source: USDA - GAIS

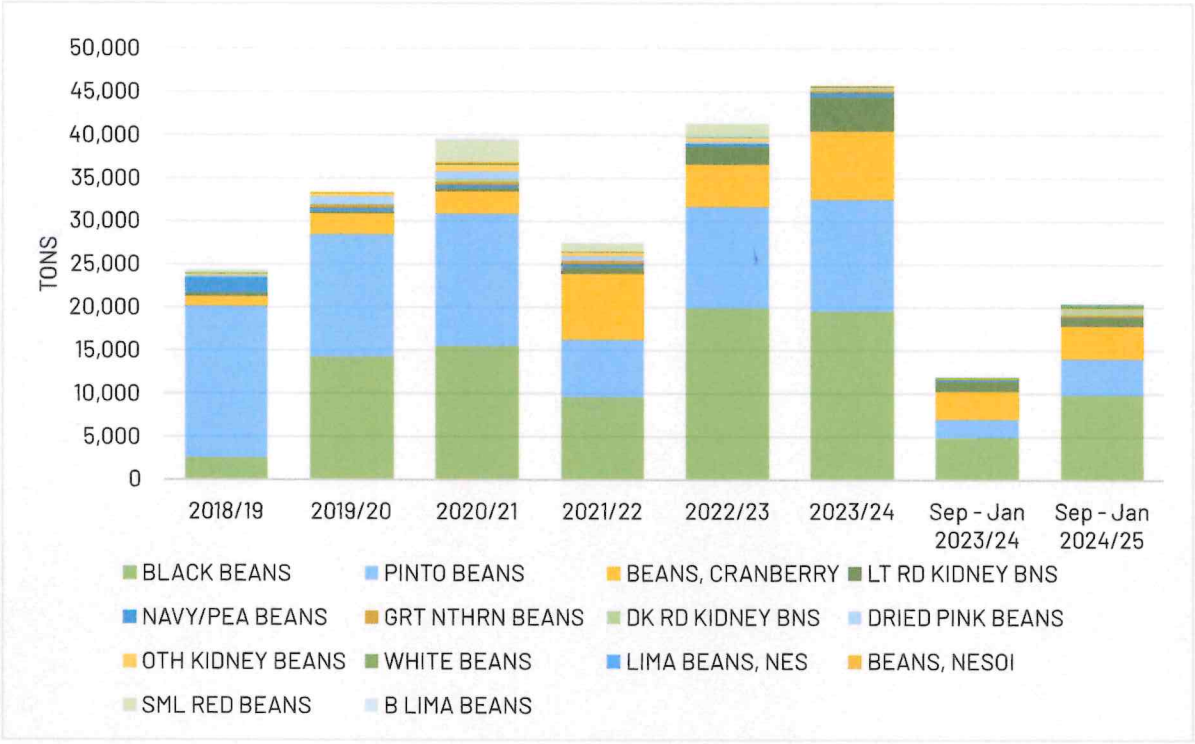
U.S. bean exports to the Dominican Republic have shown a clear upward trend in recent years, rising from 24,264 tons in 2018/19 to 45,642 tons in 2023/24—an 88% increase over six years. The period from September to January 2025 registered a remarkable 73% increase (20,481 tons) compared to the same period the previous year (11,832 tons), even surpassing the annual volumes of previous years such as 2018/19, 2019/20, and 2021/22. This sharp rise in the early months of the 2024/25 marketing year reflects accelerating Dominican demand, consolidating the Dominican Republic as a key destination for U.S. bean exports. The data demonstrate sustained market expansion, with volumes nearly doubling over the past five years, marking a historic record in the bilateral trade relationship for this product.

DOMINICAN REPUBLIC

6.2

U.S. EXPORTS OF DRIED BEANS TO DOMINICAN REPUBLIC (2019 / 2024) (SEP - JAN 2024/25)

FIGURA 19. *U.S. exports of dried beans by type to Dominican Republic*



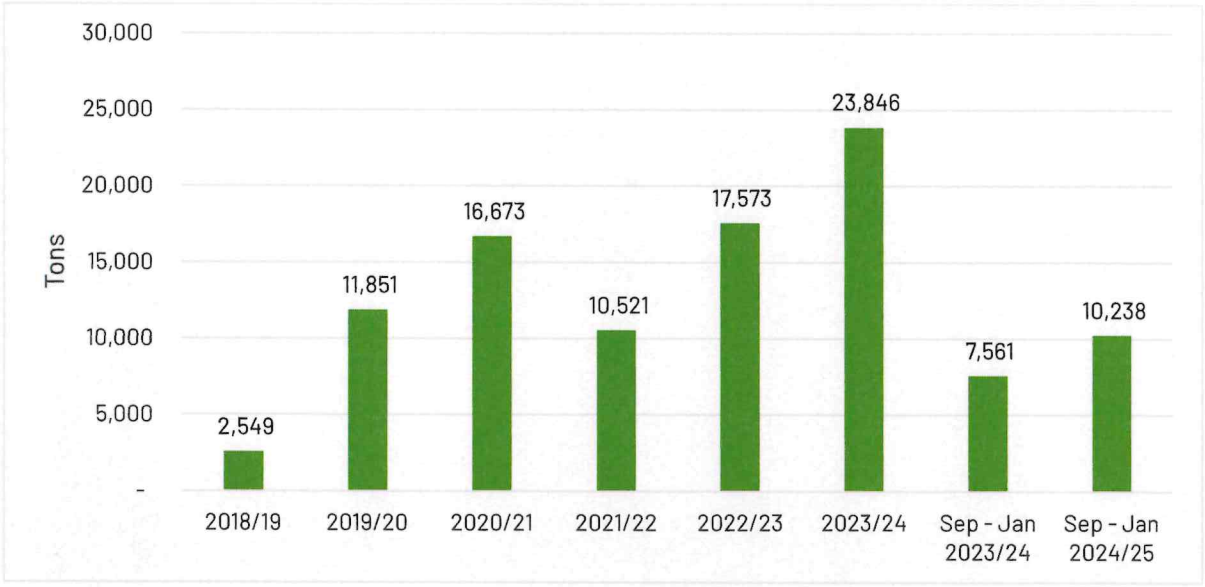
Source: USDA - GATS

U.S. bean exports to the Dominican Republic during the September–January 2024/2025 period showed differentiated trends by variety. Black beans consolidated their leadership with a remarkable increase of 102.5%, reaching 9,846 tons, while pinto beans held second place with growth of 92.7%. Cranberry beans and white beans also posted significant increases of 17.9% and 870%, respectively. In contrast, light red kidney beans decreased by 23.4%, and navy/pea beans fell by 22.8%. Noteworthy are the exceptional increases in dark red kidney beans (from 0 to 544 tons) and great northern beans (from 6 to 241 tons). Together, black beans and pinto beans accounted for 68.5% of the total volume exported during this period, clearly demonstrating Dominican market preferences for these specific varieties.

7. COSTA RICA

7.1
VOLUME OF DRY BEAN EXPORTS FROM THE UNITED STATES TO COSTA RICA

FIGURE 20. *U.S. exports of dried beans to Costa Rica (2019 / 2024) (Sep - Jan 2024/25)*



Source: USDA - GATS

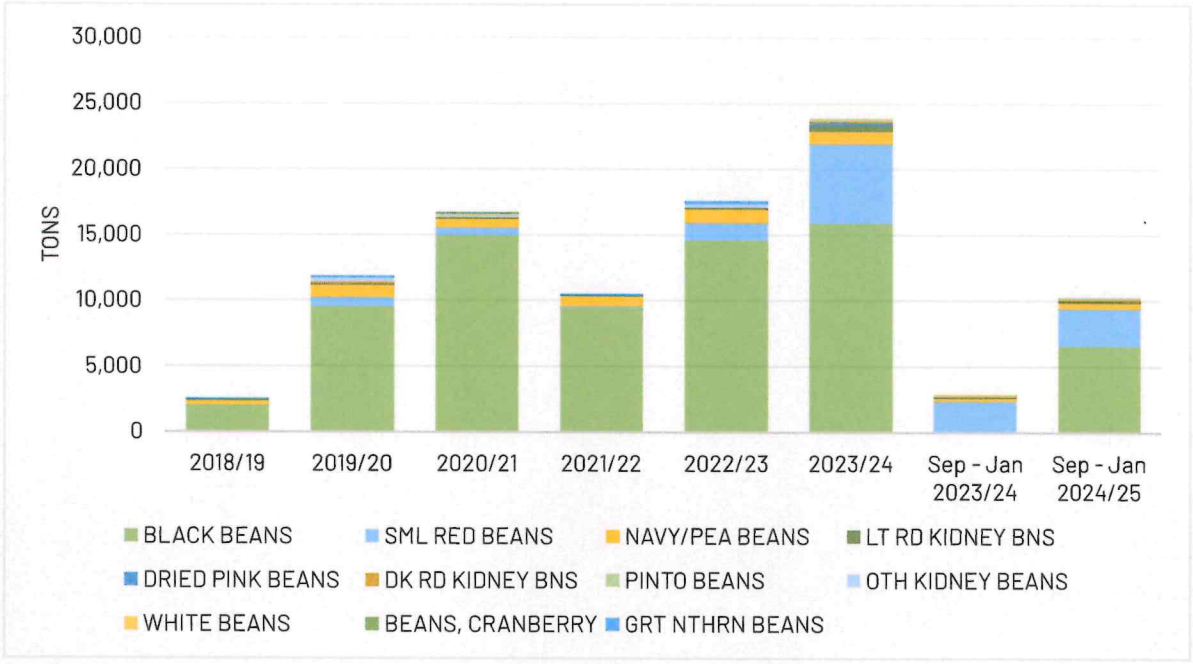
U.S. bean exports to Costa Rica have shown a sustained upward trend from 2018/19 (2,549 tons) to 2023/24 (23,846 tons), recording a notable average annual growth rate. In the September–January 2024/2025 period, there was a 35.4% increase (10,238 tons) compared to the same period the previous year (7,561 tons), even surpassing the full annual volumes of years such as 2018/19 and 2021/22. This recent growth consolidates Costa Rica's position as an expanding market for U.S. bean exports, with an increase of over 300% in the last six years.

COSTA RICA

7.2

U.S. EXPORTS OF DRIED BEANS TO COSTA RICA (2019 / 2024) (SEP - JAN 2024/25)

FIGURA 21. *U.S. exports of dried beans to Costa Rica*



Source: USDA – GATS

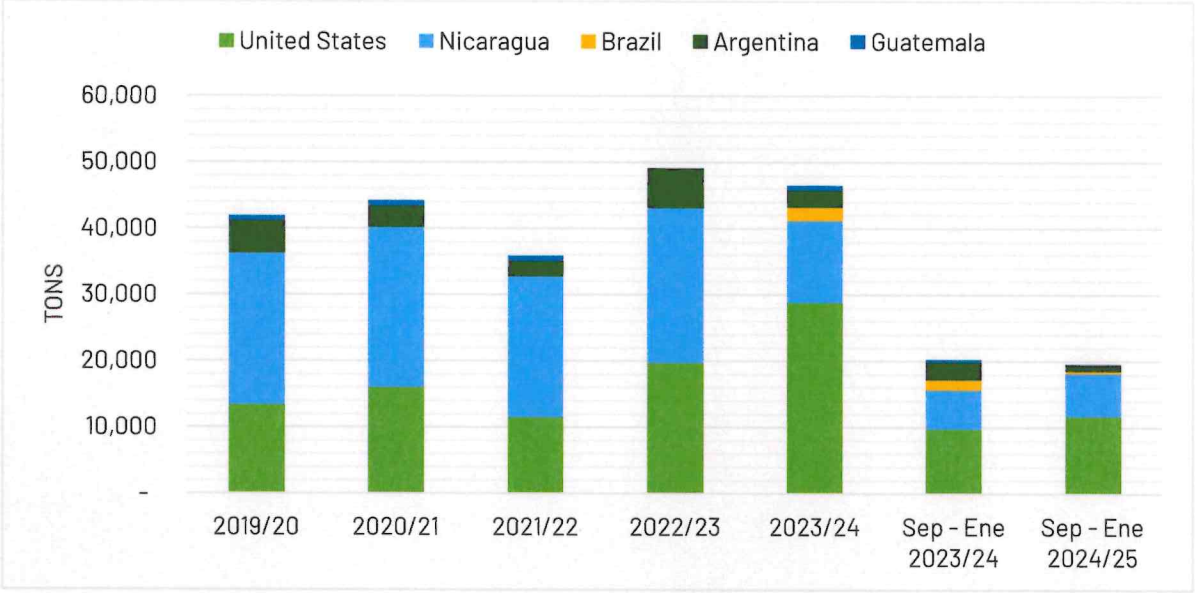
U.S. bean exports to Costa Rica show a marked preference for specific varieties during the September–January 2024/2025 period. Black beans continue to dominate the market with 6,535 tons, maintaining their historic position as the most in-demand variety. Small red beans posted 22% growth, reaching 2,870 tons. Other varieties such as navy/pea beans and light red kidney beans registered significant increases of 93.4% and 91%, respectively. The reappearance of great northern beans stands out, with 45 tons exported, while varieties such as pinto beans and dried pink beans disappeared completely from exports. The Costa Rican market shows a clear concentration in black beans and small red beans, which together accounted for 93.1% of the total export volume during this period (9,405 out of 10,238 tons), Indicating a steady inclination towards these two main types.

COSTA RICA

7.3

COSTA RICA DRY BEAN IMPORTS FROM TOP SUPPLIERS (2019-2024) AND VARIATION SEPTEMBER JANUARY 2024/25

FIGURA 22. *Costa Rica Dry Bean Imports from Top Suppliers*



Source: FDM

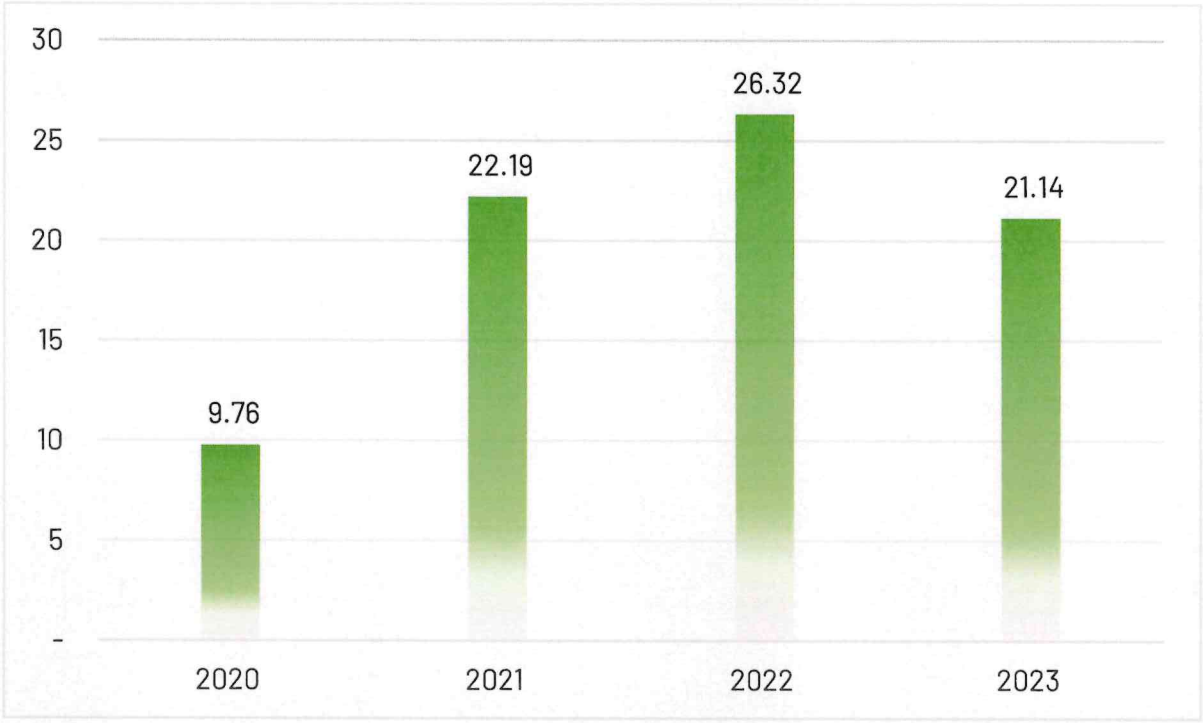
Costa Rican bean imports during the September–January 2024/2025 period show a clear consolidation of the United States as the main supplier, with an increase of 21% from 9,650 to 11,678 tons, representing 64.3% of total imports. Nicaragua, as the second-largest supplier, experienced a modest growth of 7.1% (from 5,989 to 6,416 tons), contributing the remaining 35.3%. In contrast, Brazil suffered a sharp contraction of 72.8% (from 1,566 to 426 tons), while Argentina recorded a drastic drop of 69.4% (from 2,531 to 775 tons). Guatemala maintained a marginal share with 299 tons, reflecting a 36.4% decrease. These figures demonstrate a growing concentration of supply from two main origins (the United States and Nicaragua), which together accounted for 99.6% of total imports during this period, highlighting the dominant position of the U.S. in Costa Rica's bean sector.

COSTA RICA

7.4

COSTA RICA FOOD SELF-SUFFICIENCY INDEX

FIGURA 23. *Costa Rica Food Self-Sufficiency Index (2020 / 2023)*



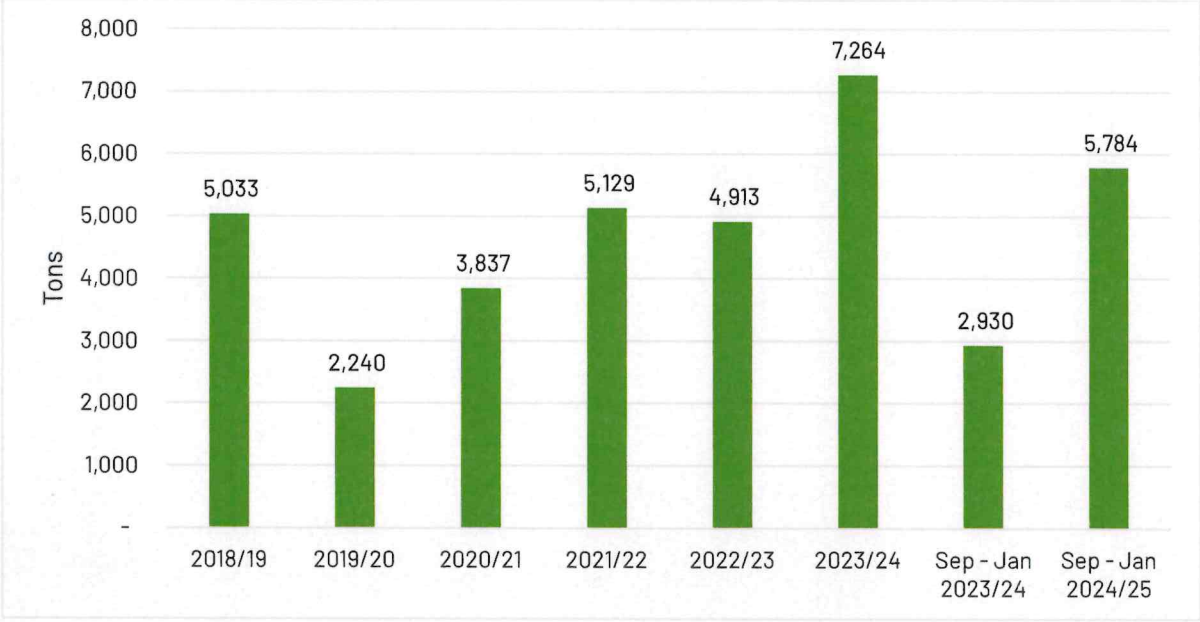
Source: Trade Data Monitor - FAO

Between 2019 and 2021, Costa Rica's Food Self-Sufficiency Index (FSI) grew significantly (from 9.76% to 26.32%), likely driven by agricultural policies and the effects of the pandemic. However, in 2022 it fell to 21.14%, reflecting vulnerability to external factors such as climate and input costs. Although there has been progress, import dependence remains high, requiring sustainable strategies to consolidate food security.

8. GUATEMALA

8.1
VOLUME OF DRY BEAN EXPORTS FROM THE UNITED STATES TO GUATEMALA

FIGURE 24. *U.S. exports of dried beans to Guatemala (2019 / 2024) (Sep - Jan 2024/25)*



Source: USDA – GATS

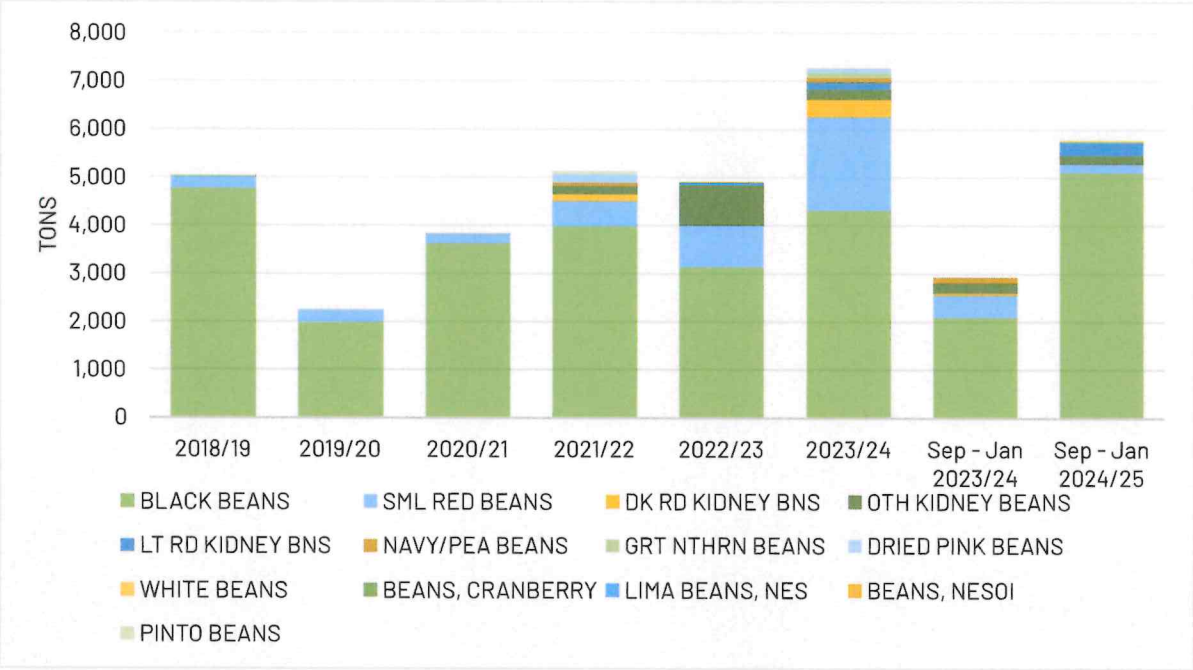
U.S. bean exports to Guatemala show a significant recovery in the September–January 2024/2025 period, reaching 5,784 tons, which represents a 97.4% increase compared to the same period of the previous year (2,930 tons). This growth consolidates the upward trend observed since 2021/22, following the decline recorded in 2019/20. The volume exported in the first five months of 2024/25 already surpasses the full annual totals of years such as 2018/19 (5,033 tons) and 2022/23 (4,913 tons). Guatemala has steadily increased its purchases since 2020/21, reaching a historic high in 2023/24 (7,264 tons), and partial data for 2024/25 suggest that this record could be surpassed. The Guatemalan market demonstrates a growing and stable demand for U.S. beans, with volumes more than doubling over the past five years.

GUATEMALA

8.2

U.S. EXPORTS OF DRIED BEANS TO GUATEMALA BY BEAN TYPE (2019 / 2024) (SEP - JAN 2024/25)

FIGURA 25. *U.S. exports of dried beans to Guatemala by bean type*



Source: USDA - GATS

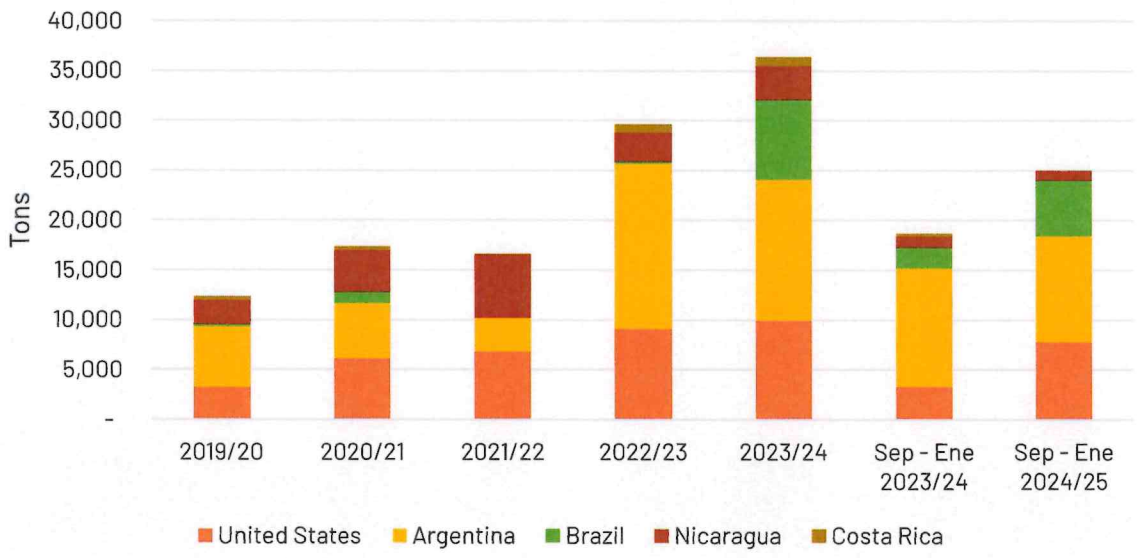
U.S. bean exports to Guatemala show a marked concentration in the Black Bean variety, which accounted for 88.1% of the total (5,096 out of 5,784 tons) during the September–January 2024/2025 period, registering a 143.4% increase compared to the same period the previous year (2,094 tons). The Light Red Kidney Beans (272 tons) and Other Kidney Beans (181 tons) appeared as secondary varieties, although with significantly lower volumes. In contrast, Small Red Beans showed a 60% decrease (from 460 to 184 tons), while Dark Red Kidney Beans and Navy/Pea Beans disappeared completely from exports (from 43 and 114 tons to 0, respectively). Other varieties such as Great Northern Beans (31 tons) and White Beans (19 tons) maintained marginal shares. The export structure demonstrates a strong dependence of the Guatemalan market on Black Beans, which accounted for most of the year-on-year growth, while the rest of the varieties showed mixed behavior, with some disappearing from bilateral trade altogether.

GUATEMALA

8.3

GUATEMALA DRY BEAN IMPORTS FROM TOP SUPPLIERS (2019-2024) AND VARIATION SEPTEMBER JANUARY 2024/25

FIGURA 26. *Guatemala Dry Bean Imports from Top Suppliers*



Source: TDM

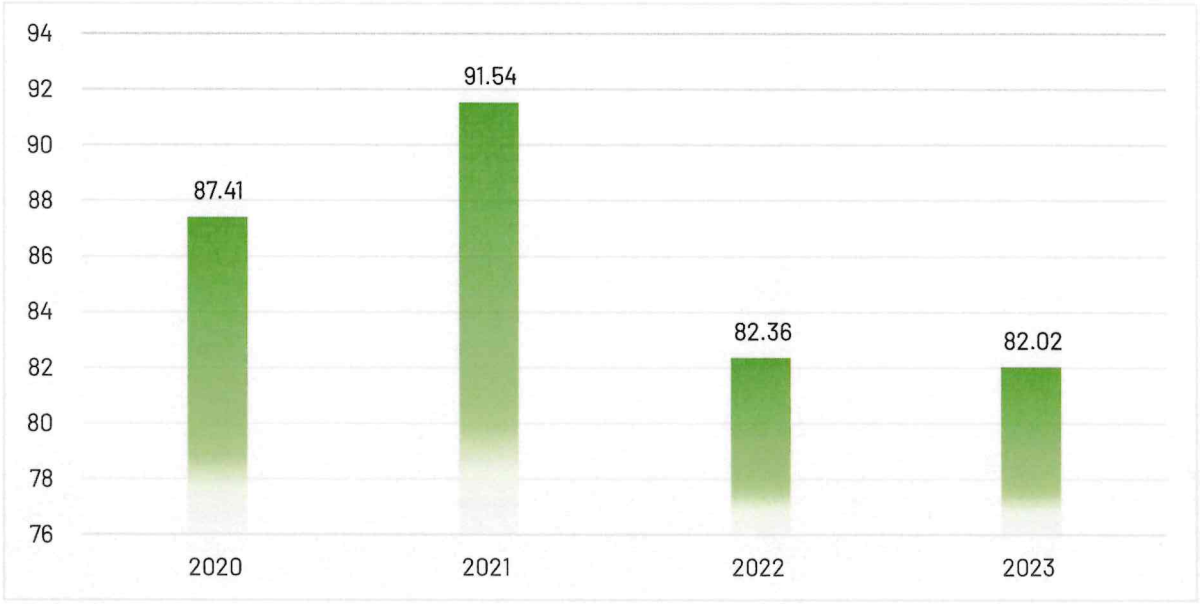
Guatemalan bean imports show a dynamic shift among their main suppliers during the September–January 2024/2025 period. The United States increased its exports by 133.7% (from 3,325 to 7,769 tons), consolidating its position as the second-largest supplier behind Argentina, which, despite maintaining a significant volume (10,633 tons), recorded a 10.3% decrease compared to the same period the previous year (11,849 tons). Brazil showed a notable increase of 174.7% (from 2,044 to 5,614 tons), positioning itself as the third-largest supplier. Nicaragua experienced a reduction of 17.8% (from 1,193 to 981 tons), while Costa Rica disappeared completely as a supplier (from 256 tons to 0). The import structure reveals a greater relative weight for the United States, which rose from representing 17.8% of total imports in Sep–Jan 2023/24 to 30.6% in 2024/25, while Argentina's share fell from 62.4% to 41.9% over the same period.

GUATEMALA

8.4

INDEX GUATEMALA FOOD SELF-SUFFICIENCY INDEX

FIGURA 27. *Guatemala Food Self-Sufficiency Index (2020 / 2023)*



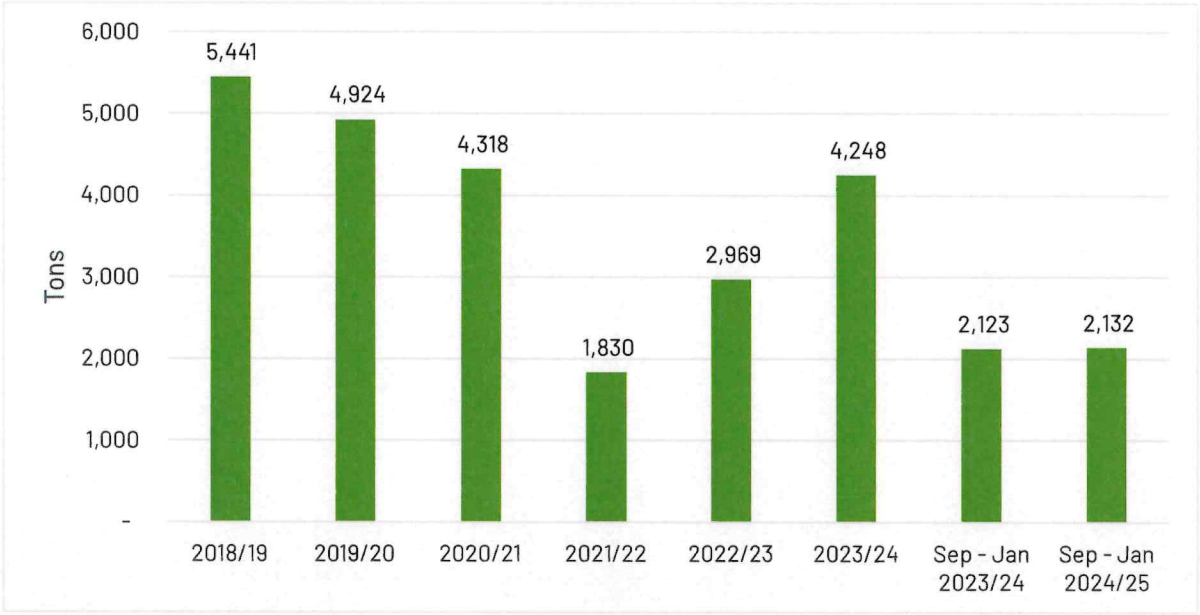
Source: Trade Data Monitor - FAO

Guatemala's Food Self-Sufficiency Index (FSI) peaked at 91.54% in 2021, surpassing the 87.41% level in 2020, reflecting strong productive capacity. However, in 2022 and 2023, it fell to 82.36% and 82.02%, respectively, indicating challenges such as extreme weather events, and increased production costs. Despite the decline, Guatemala maintains a high FSI (>80%), indicating that its import dependence is limited.

9. PANAMA

9.1
VOLUME OF DRY BEAN EXPORTS FROM THE UNITED STATES TO PANAMA

FIGURE 28. *U.S. exports of dried beans to Panama (2019 / 2024) (Sep - Jan 2024/25)*



Source: USDA - GATS

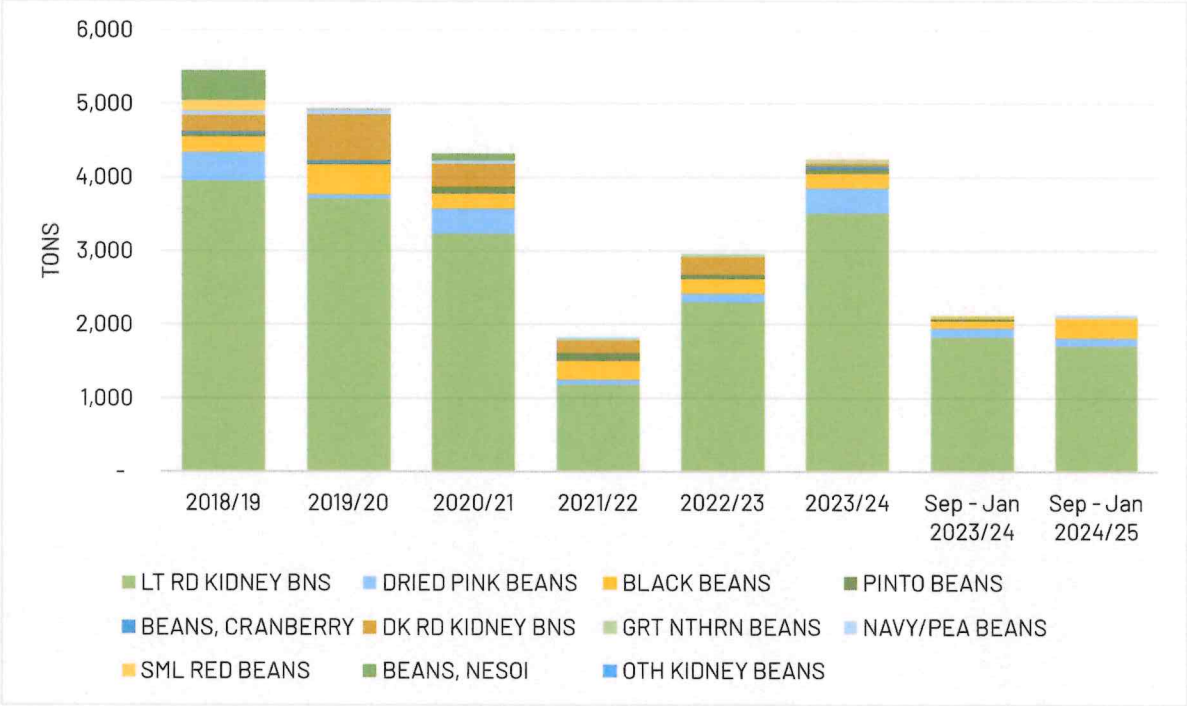
U.S. bean exports to Panama showed relative stability during the September–January 2024/2025 period, with a volume of 2,132 tons, representing a minimal increase of 0.4% compared to the same period the previous year (2,123 tons). This behavior contrasts with the recovery observed in the full year 2023/24 (4,248 tons), which surpassed the levels of 2021/22 (1,830 tons) and 2022/23 (2,969 tons). The data reflect that the Panamanian market maintains a steady demand for U.S. beans, although it does not exhibit the significant growth seen in other Central American markets. The volume exported in the first five months of 2024/25 represents approximately 50% of the total for 2023/24, maintaining a similar proportion to previous years.

PANAMA

9.2

U.S. EXPORTS OF DRIED BEANS TO PANAMA BY BEAN TYPE (2019 / 2024) (SEP - JAN 2024/25)

FIGURA 29. *U.S. exports of dried beans to Panama by bean type*



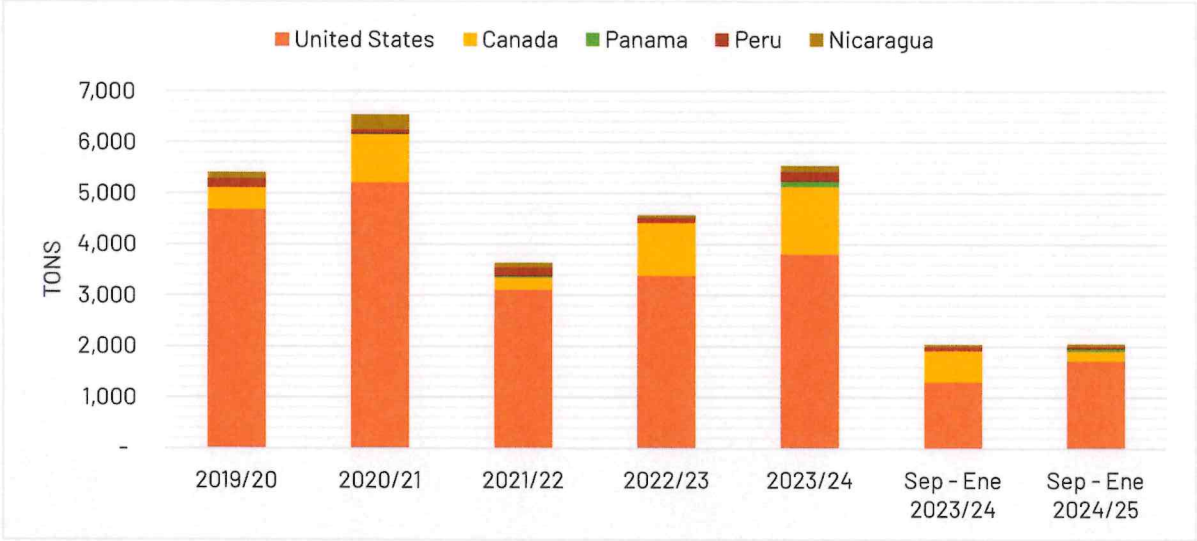
Source: USDA – GATS

U.S. bean exports to Panama during September–January 2024/2025 show significant variations by variety. Light Red Kidney Beans, the main export product, decreased by 6.8% (from 1,830 to 1,705 tons), yet still accounted for 80% of the total volume. Black Beans recorded a 187.9% increase (from 91 to 262 tons), becoming the second most important variety. Navy/Pea Beans showed a notable rise (from 3 to 40 tons), while Dried Pink Beans remained stable (125 to 120 tons). Varieties such as Pinto Beans, Dark Red Kidney Beans, and Cranberry Beans disappeared completely from exports during this period. The export structure continues to be dominated by Light Red Kidney Beans, although there is greater relative diversification, with Black Beans and Navy/Pea Beans gaining a share in the export mix.

9.3

PANAMA DRY BEAN IMPORTS FROM TOP SUPPLIERS (2019-2024) AND VARIATION SEPTEMBER JANUARY 2024/25

FIGURA 30. *Guatemala Dry Bean Imports from Top Suppliers*



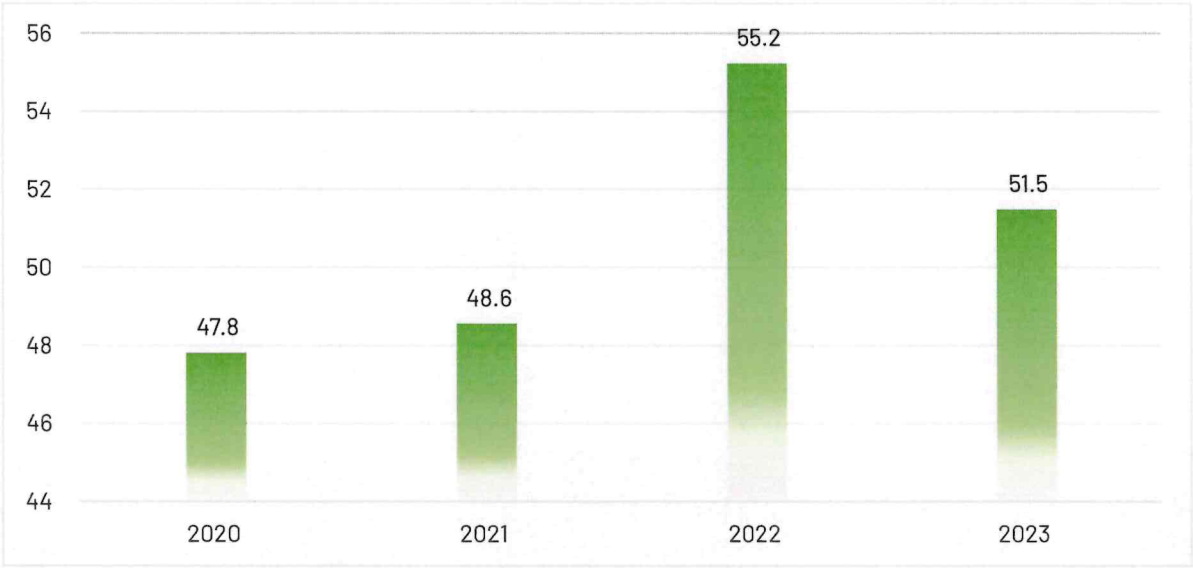
Source: TDM

Guatemalan bean imports show a dynamic shift among their main suppliers during the September–January 2024/2025 period. The United States increased its exports by 133.7% (from 3,325 to 7,769 tons), consolidating its position as the second-largest supplier behind Argentina, which, despite maintaining a significant volume (10,633 tons), recorded a 10.3% decrease compared to the same period the previous year (11,849 tons). Brazil showed a notable increase of 174.7% (from 2,044 to 5,614 tons), positioning itself as the third-largest supplier. Nicaragua experienced a reduction of 17.8% (from 1,193 to 981 tons), while Costa Rica disappeared completely as a supplier (from 256 tons to 0). The import structure reveals a greater relative weight for the United States, which rose from representing 17.8% of total imports in Sep–Jan 2023/24 to 30.6% in 2024/25, while Argentina's share fell from 62.4% to 41.9% over the same period.

PANAMA

9.4
INDEX FOOD SELF-SUFFICIENCY PANAMA

FIGURA 31. *Panama Food Self-Sufficiency Index (2020 / 2023)*



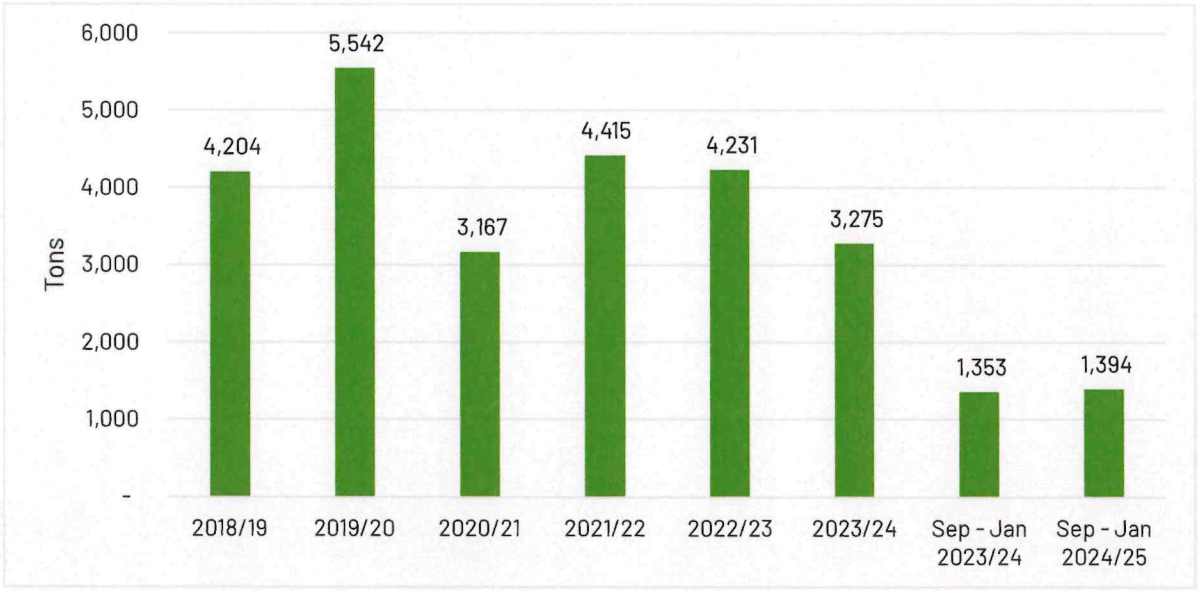
Source: Trade Data Monitor - FAO

Panama's FSS grew from 47.8% (2020) to 55.2% (2022), demonstrating greater self-sufficiency, but in 2023 it fell to 51.5%, revealing vulnerabilities (climate, costs). Although it exceeds 50%, it still depends on imports.

10. EL SALVADOR

10.1
VOLUME OF DRY BEAN EXPORTS FROM THE UNITED STATES TO EL SALVADOR

FIGURE 32. *U.S. exports of dried beans to El Salvador (2019 / 2024) (Sep - Jan 2024/25)*



Source: USDA - GATS

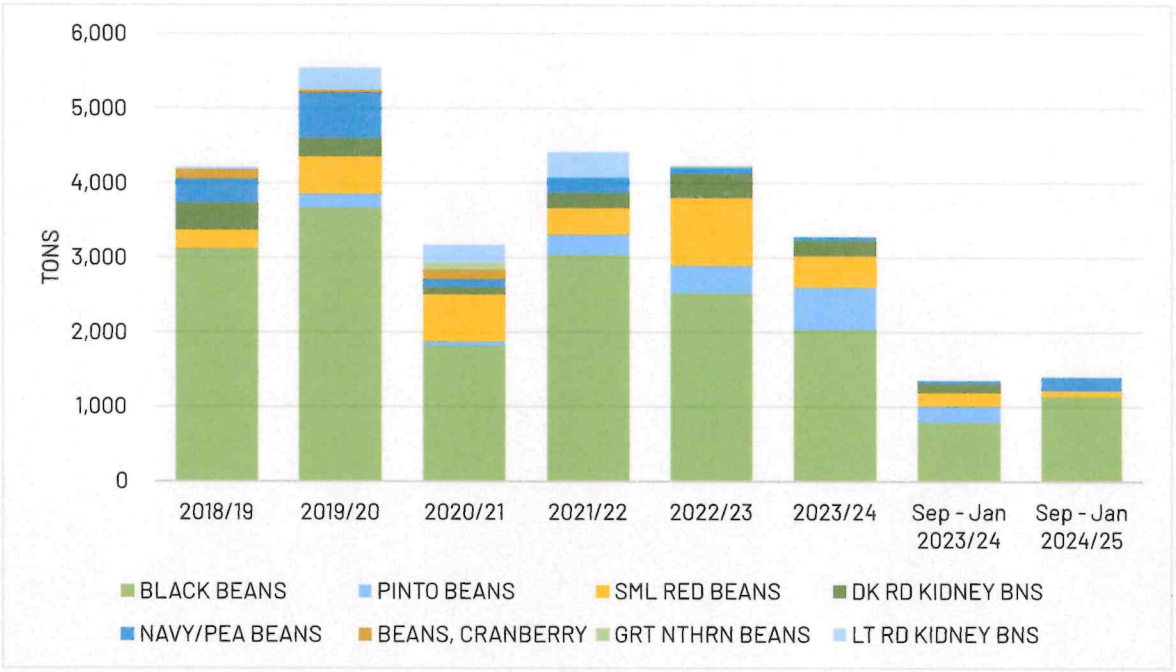
U.S. bean exports to El Salvador showed relative stability during the September–January 2024/2025 period, with a slight increase of 3%, rising from 1,353.20 to 1,394.00 tons. This behavior contrasts with the downward trend observed in recent years, where annual exports fell from 5,541.90 tons in 2019/20 to 3,274.60 in 2023/24. The volume exported in the first five months of 2024/25 represents 42.6% of the total for the previous year, maintaining a similar proportion to previous periods. The Salvadoran market shows constant but moderate demand for U.S. beans, without reaching the volumes recorded in the 2018/19–2019/20 period. The data suggest stability in imports, although at levels significantly lower than historical highs.

EL SALVADOR

10.2

U.S. EXPORTS OF DRIED BEANS TO EL SALVADOR BY BEAN TYPE (2019 / 2024) (SEP - JAN 2024/25)

FIGURA 33. *U.S. exports of dried beans to El Salvador by bean type*



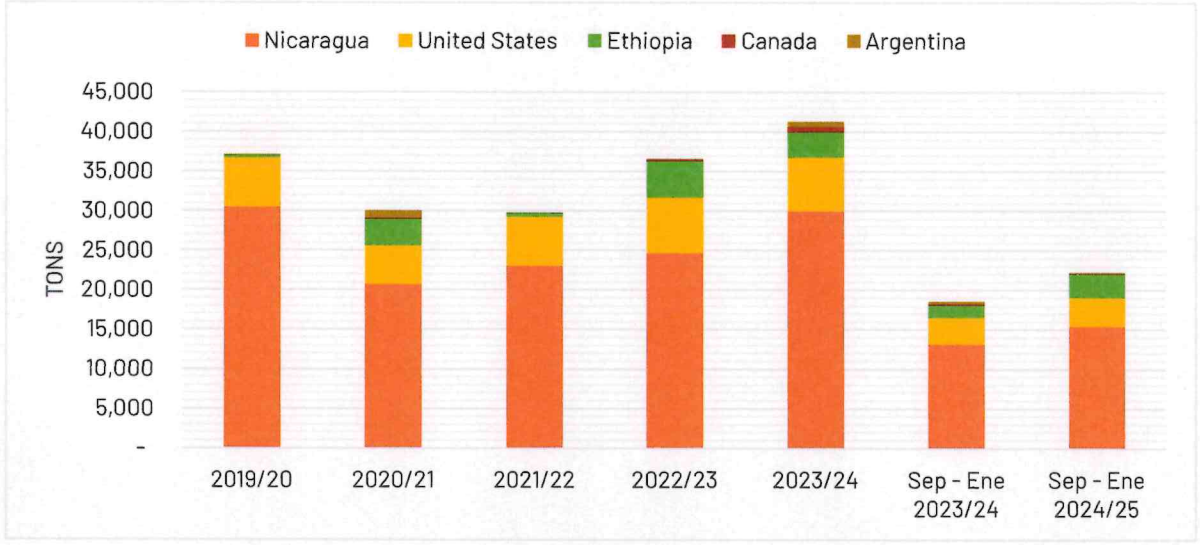
Source: USDA – GATS

U.S. bean exports to El Salvador showed notable changes by variety during September–January 2024/2025. Black beans led exports with an increase of 44.4%, rising from 786.3 to 1,135.4 tons and accounting for 81.5% of the total volume. Navy/pea beans showed the most significant growth (327.8%), reaching 178.8 tons. In contrast, pinto beans and dark red kidney beans disappeared completely from shipments, while small red beans saw their volume reduced by 55.6%. Other varieties, such as cranberry beans and light red kidney beans, remained absent from exports. This dynamic reflects a growing concentration of the Salvadoran market on black beans, which overwhelmingly dominate bilateral trade, accompanied by a resurgence of navy/pea beans as the second most relevant variety.

10.3

EL SALVADOR DRY BEAN IMPORTS FROM TOP SUPPLIERS (2019-2024) AND VARIATION SEPTEMBER JANUARY 2024/25

FIGURA 34. *El Salvador Bean Imports from Top Suppliers*



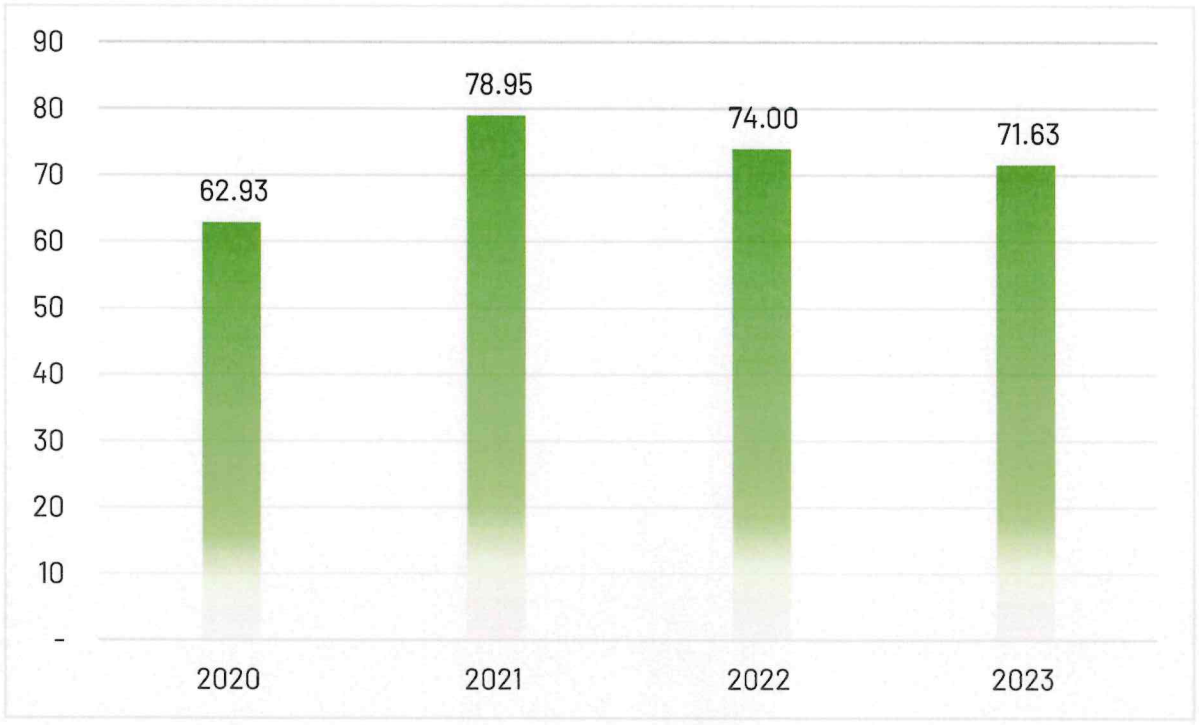
Source: FDM

Salvador bean imports show significant changes in their sourcing patterns during September–January 2024/2025. Nicaragua, the main supplier, increased its shipments by 16.9% (from 13,174 to 15,405 tons), maintaining its dominant position. The United States, the second-largest supplier, recorded a 9% increase (from 3,327 to 3,628 tons). Ethiopia showed the most notable growth (92.2%), rising from 1,570 to 3,017 tons. Canada experienced a drastic reduction of 59.6% (from 250 to 101 tons), while Argentina decreased its exports by 53.4% (from 305 to 142 tons). The import structure reflects a greater concentration in Nicaragua, which accounted for 69.4% of the total, followed by the United States (16.3%) and Ethiopia (13.6%). These three countries together made up 99.3% of total imports during this period.

EL SALVADOR

10.4
FOOD SELF-SUFFICIENCY INDEX EL SALVADOR

FIGURA 35. *El Salvador Food Self-Sufficiency Index (2020 / 2023)*



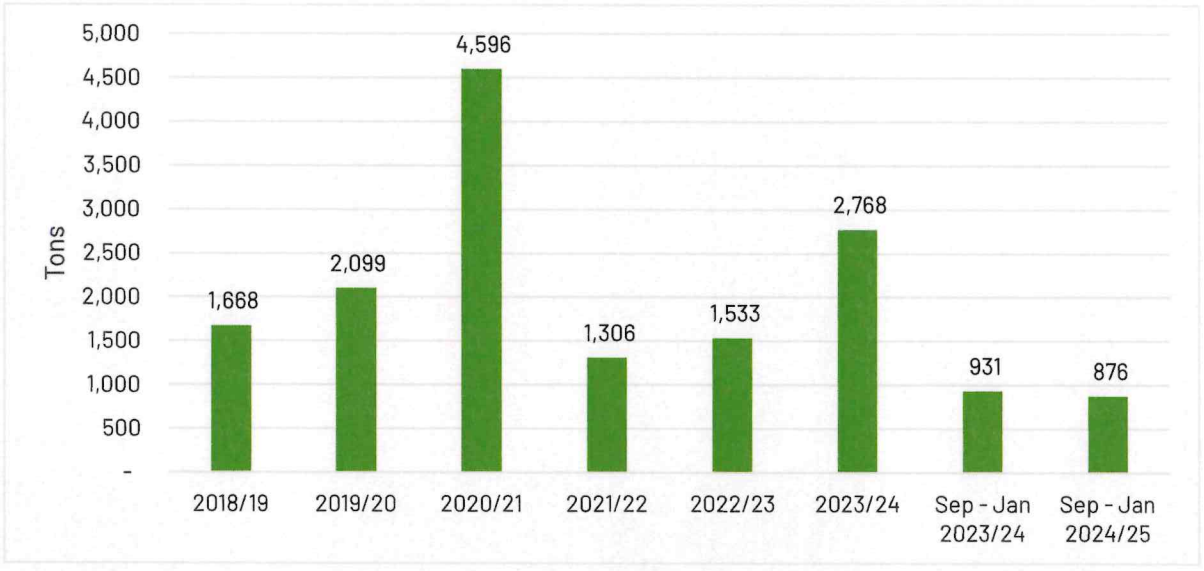
Source: Trade Data Monitor - FAO

El Salvador achieved a record increase in food self-sufficiency (from 62.93% to 78.95%) between 2020 and 2022 but then dropped to 71.63% in 2023. Despite significant progress, structural challenges persist—such as dependence on imported inputs or climate vulnerability. To sustain progress, long-term policies are needed to strengthen agricultural productivity and reduce external risks, ensuring the country maintains its capacity to meet domestic food demand.

11. PERU

11.1
VOLUME OF DRY BEAN EXPORTS FROM THE UNITED STATES TO PERU

FIGURE 36. *U.S. exports of dried beans to Peru (2019 / 2024) (Sep - Jan 2024/25)*



Source: USDA – GATS

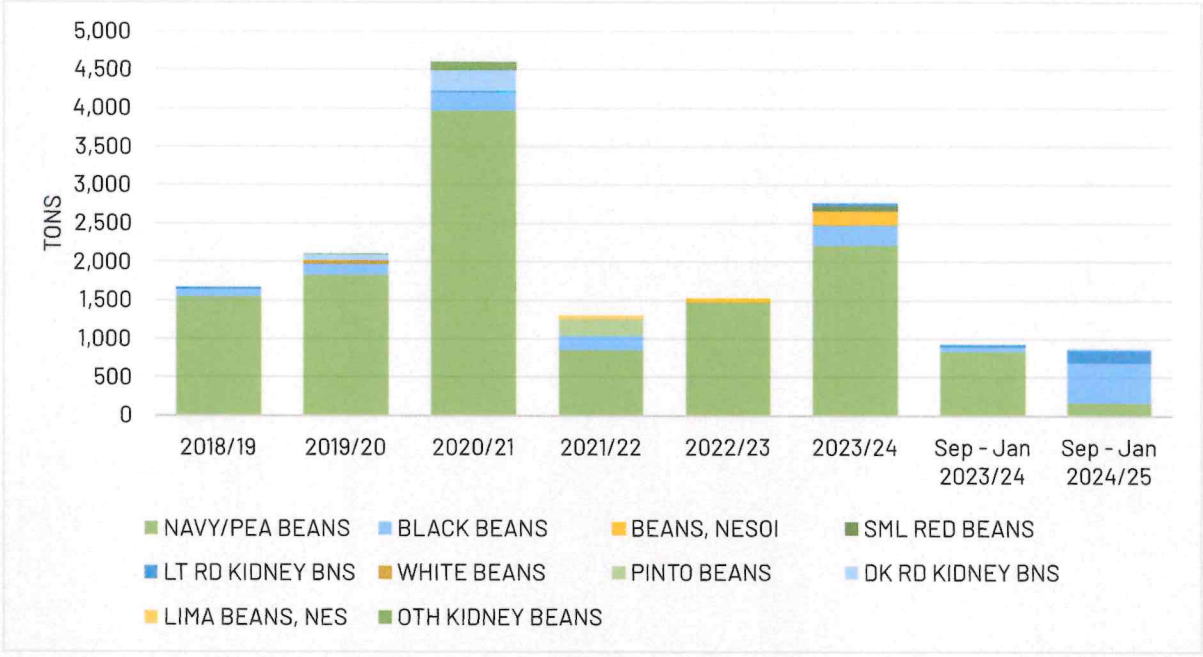
U.S. bean exports to Peru registered a slight decrease of 5.9% during the September–January 2024/25 period (876 tons) compared to the same period the previous year (931 tons). This behavior contrasts with the upward trend observed in 2023/24 (2,768 tons), which represented the highest annual volume since 2020/21 (4,596 tons). The first five months of 2024/25 account for 31.6% of the total exported in 2023/24, a proportion lower than that recorded in previous years. The Peruvian market shows fluctuating demand for U.S. beans, with volumes that have not surpassed the peak reached in 2020/21. The data suggest stabilization at moderate levels, although with a slight contraction in the most recent period analyzed.

PERU

11.2

U.S. EXPORTS OF DRIED BEANS TO PERU BY BEAN TYPE (2019 / 2024) (SEP - JAN 2024/25)

FIGURA 37. *U.S. exports of dried beans to Peru by bean type*



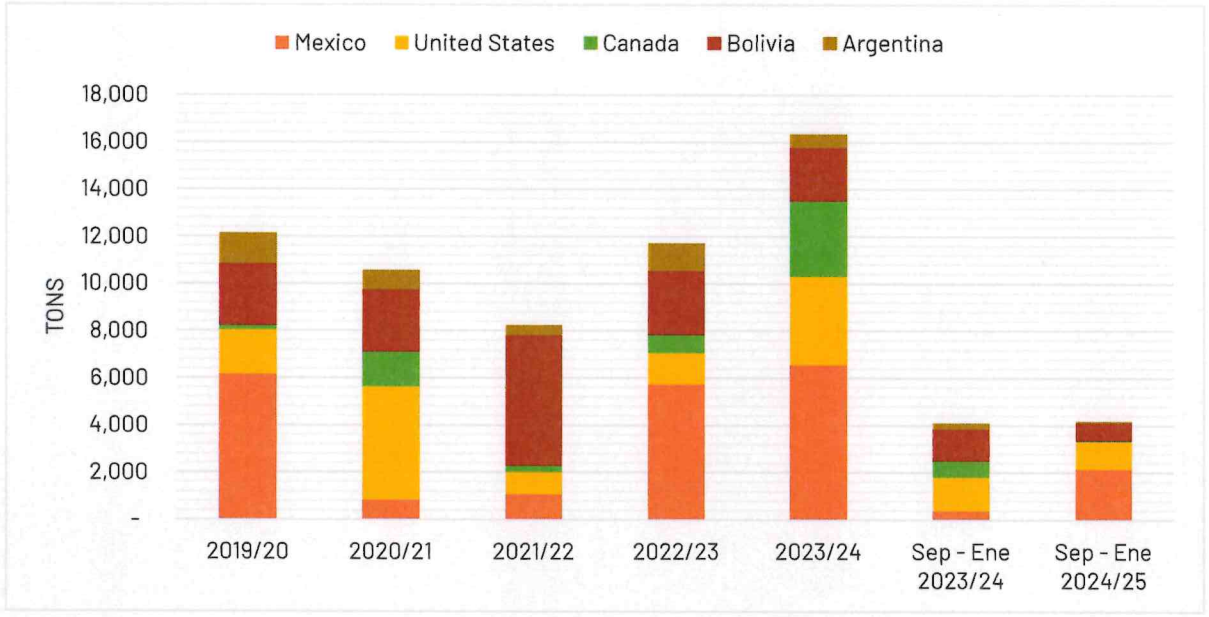
Source: USDA – GATS

U.S. bean exports to Peru show significant changes by variety during the September–January 2024/2025 period. Navy/Pea Beans, traditionally dominant, suffered a drastic reduction of 79.4% (from 830 to 171 tons). In contrast, Black Beans recorded explosive growth of 803.4% (from 58 to 524 tons), becoming the most exported variety. Light Red Kidney Beans showed an increase of 269.8% (from 43 to 159 tons), while Dark Red Kidney Beans reappeared with 23 tons. The trade structure evidenced a radical shift: while in 2023/24 Navy/Pea Beans accounted for 80% of exports, in 2024/25 Black Beans concentrated 59.8% of the total, followed by Navy/Pea Beans (19.5%) and Light Red Kidney Beans (18.2%). This change reflects a substantial transformation in the demand patterns of the Peruvian market.

11.3

PERU DRY BEAN IMPORTS FROM TOP SUPPLIERS (2019-2024) AND VARIATION SEPTEMBER JANUARY 2024/25

FIGURA 38. *Peru Bean Imports from Top Suppliers*



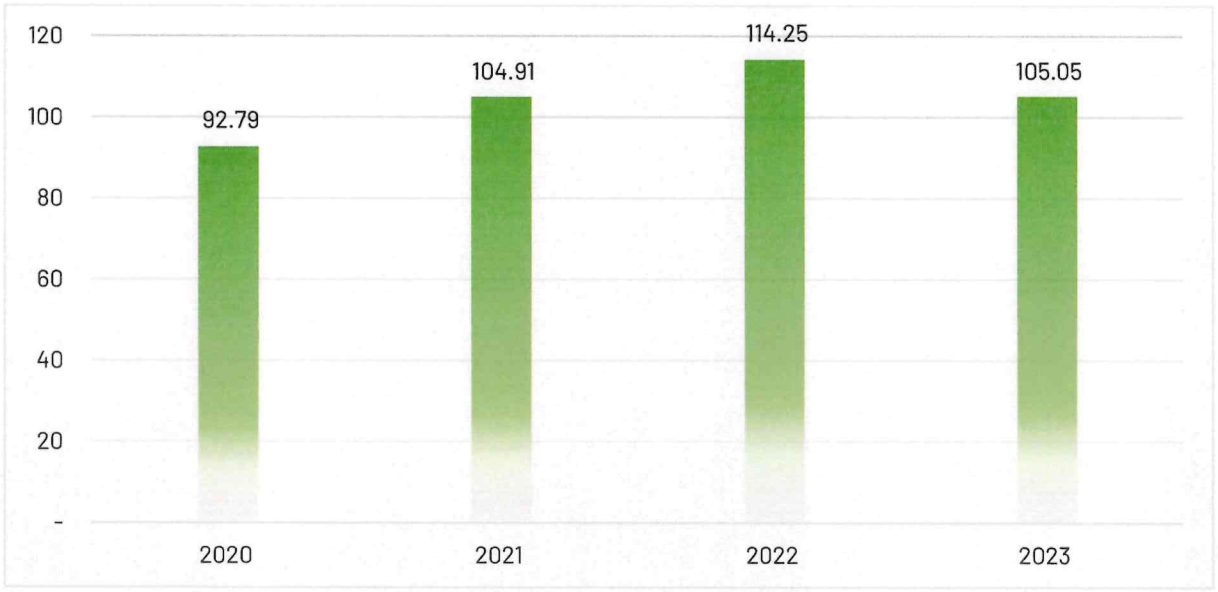
Source: TDM

Peruvian bean imports show significant changes in their sources of supply during September–January 2024/25. Mexico consolidated its position as the main supplier with an increase of 473% (from 373 to 2,138 tons), regaining its dominant position. The United States, the second-largest supplier, recorded a decrease of 17.5% (from 1,431 to 1,180 tons). Bolivia showed a reduction of 43.5% (from 1,374 to 776 tons), while Canada experienced a drastic drop of 93.9% (from 674 to 41 tons). Argentina posted the largest decline (-80.1%), falling from 251 to 50 tons. The import structure reveals a greater concentration in Mexico, which rose from accounting for 10.8% of the total in 2023/24 to 51.3% in 2024/25, while the United States maintained 28.3% and Bolivia 18.6%, with these three countries together making up 98.2% of total imports.

PERU

11.4
PERU FOOD SELF-SUFFICIENCY INDEX

FIGURA 39. *Peru Food Self-Sufficiency Index (2020 / 2023)*



Source: Trade Data Monitor - FAO

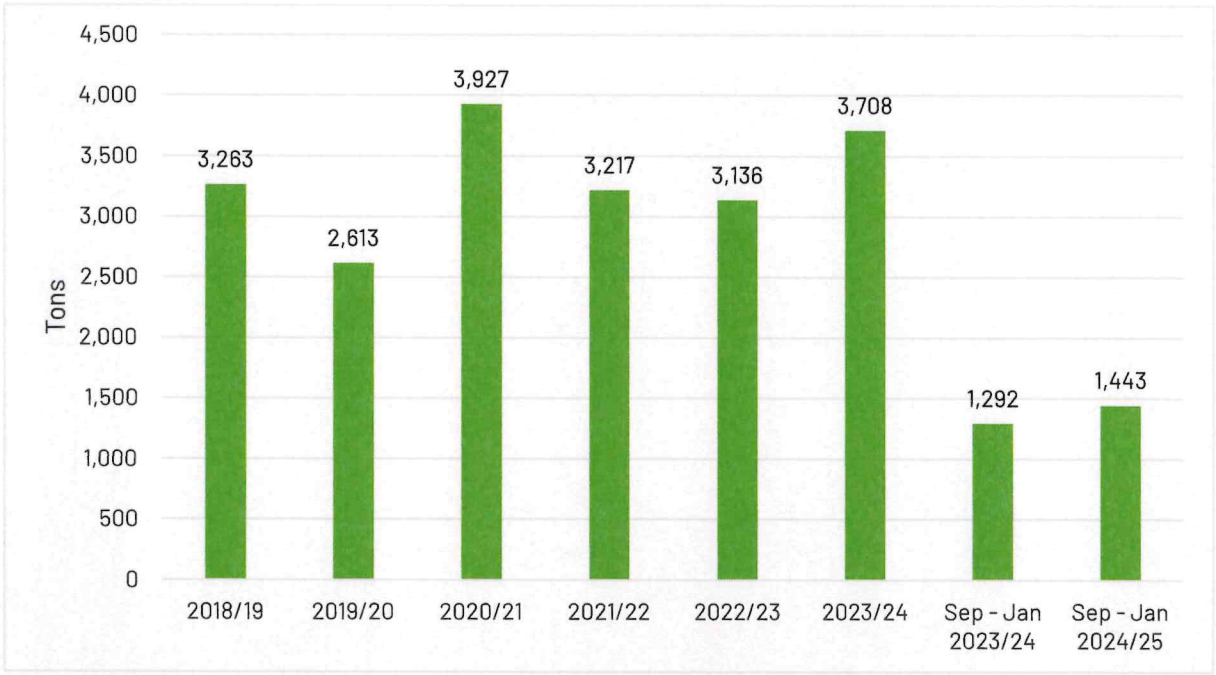
Peru's FSS Analysis (2020-2023): Peru shows outstanding performance in food self-sufficiency, with sustained growth from 92.79% (2020) to exceed 100% starting in 2021, reaching its peak in 2022 (114.25%), reflecting not only its ability to meet domestic demand but also its ability to generate exportable surpluses. However, the decline to 105.05% in 2023 suggests potential challenges such as adverse weather events (El Niño).

Despite this correction, Peru maintains an enviable position in food security, although it must strengthen climate resilience and optimize surplus marketing to sustain its long-term leadership.

12. JAMAICA

12.1
VOLUME OF DRY BEAN EXPORTS FROM THE UNITED STATES TO JAMAICA

FIGURE 40. *U.S. exports of dried beans to Jamaica (2019 / 2024) (Sep - Jan 2024/25)*



Source: USDA - GATS

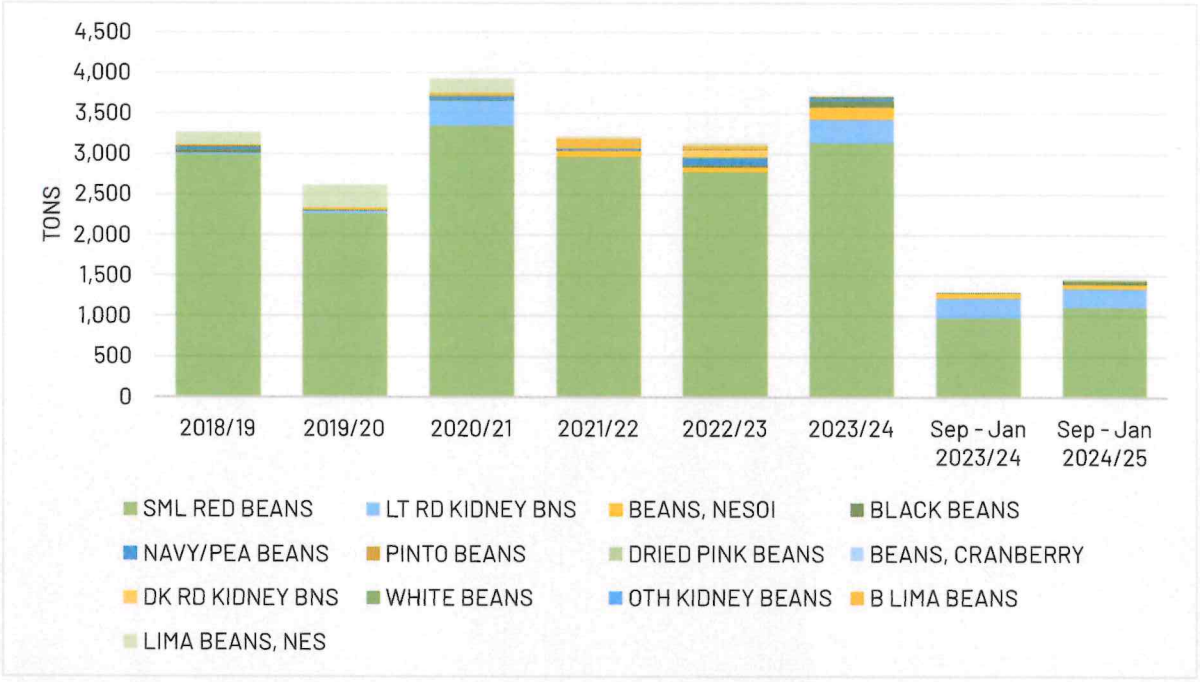
U.S. bean exports to Jamaica show a moderate recovery in the September–January 2024/2025 period, with an increase of 11.7% (1,443 tons) compared to the same period of the previous year (1,292 tons). This growth follows the upward trend observed in 2023/24 (3,708 tons), which represented the highest annual volume since 2020/21 (3,927 tons). The first five months of 2024/25 account for 38.9% of the total exported in 2023/24, a proportion similar to previous years. The Jamaican market maintains a stable demand for U.S. beans, with volumes remaining in the 3,000–3,900 ton range annually since 2018/19.

JAMAICA

12.2

U.S. EXPORTS OF DRIED BEANS TO JAMAICA BY BEAN TYPE (2019 / 2024) (SEP - JAN 2024/25)

FIGURA 41. *U.S. exports of dried beans to Jamaica by bean type*



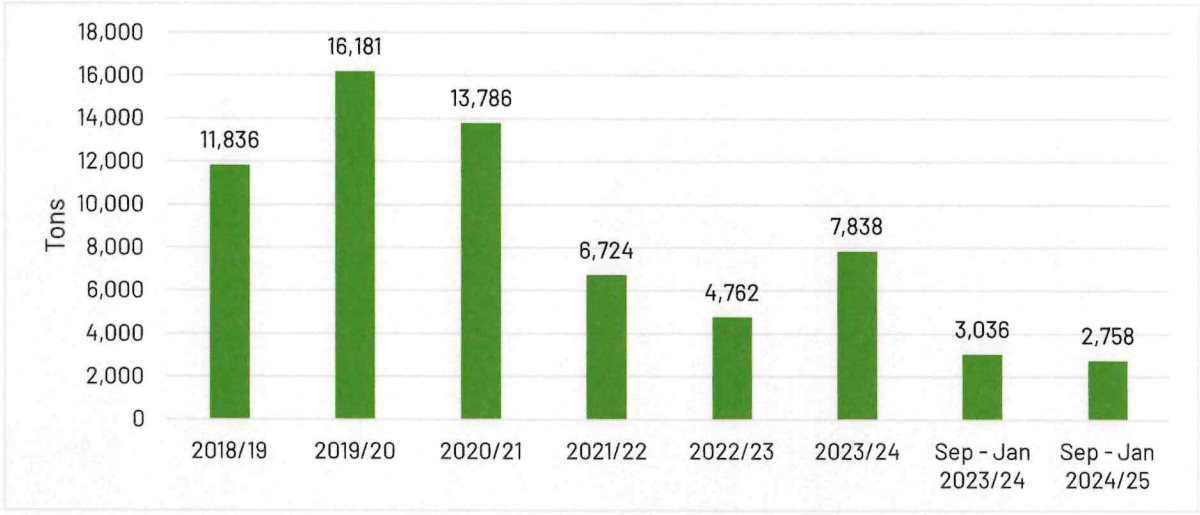
Source: USDA - GATS

U.S. bean exports to Jamaica in the September–January 2024/2025 period show that Small Red Beans maintained their dominance with a 12.4% increase (from 981 to 1,103 tons), representing 76.4% of the total volume. Light Red Kidney Beans stabilized (243 vs. 241 tons), retaining their position as the second most important variety. Black Beans recorded a significant increase (from 5 to 47 tons), although still with modest volumes.

13. HAITI

13.1
VOLUME OF DRY BEAN EXPORTS FROM THE UNITED STATES TO HAITI

FIGURE 42. *U.S. exports of dried beans to Haiti (2019 / 2024) (Sep - Jan 2024/25*



Source: USDA - GATS

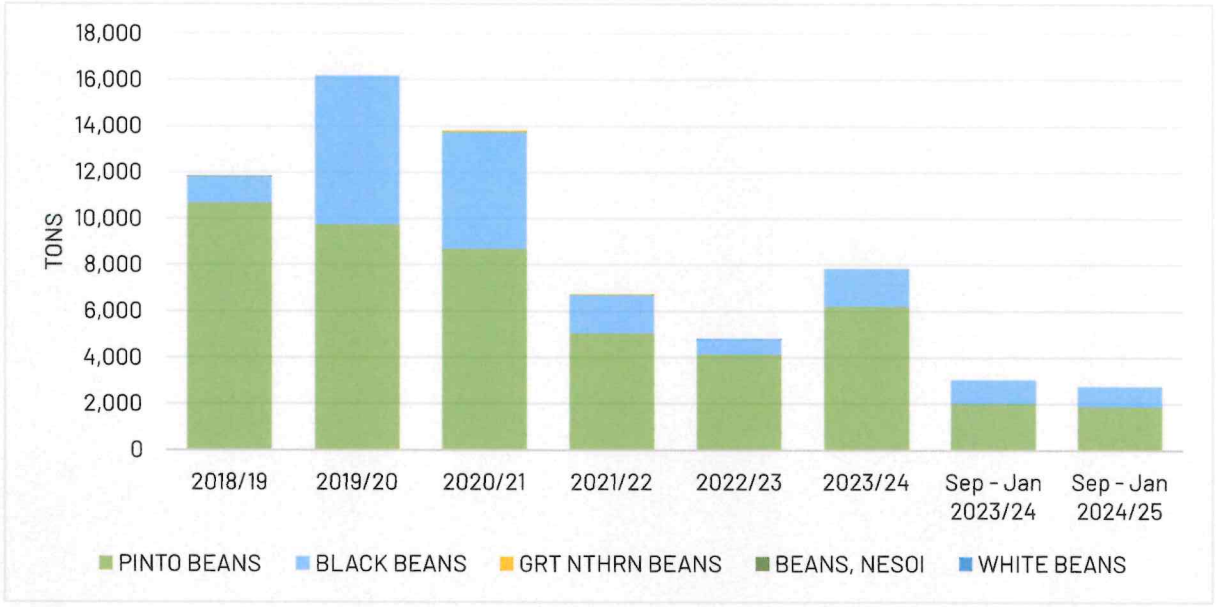
U.S. bean exports to Haiti show a 9.2% decrease in the September–January 2024/2025 period (2,758 tons) compared to the same period the previous year (3,036 tons), continuing the downward trend observed since the peak in 2019/20 (16,181 tons). Despite a recovery in 2023/24 (7,838 tons), volumes remain significantly below historic levels (11,836 tons in 2018/19). The first five months of 2024/25 account for only 35.2% of the total for 2023/24, a proportion lower than in previous years. The Haitian market shows declining demand for U.S. beans, with a cumulative contraction of 76.6% from 2019/20 to the latest partial data for 2024/25.

HAITI

13.2

U.S. EXPORTS OF DRIED BEANS TO HAITI BY BEAN TYPE (2019 / 2024) (SEP - JAN 2024/25

FIGURA 43. *U.S. exports of dried beans to Haiti by bean type*



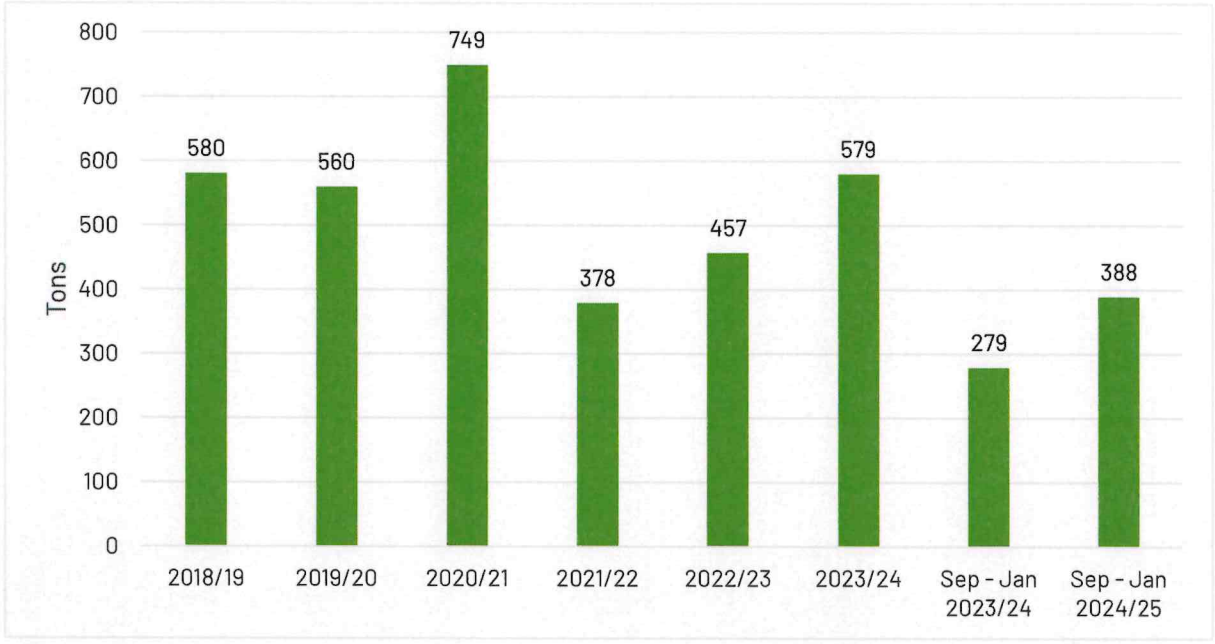
Source: USDA – GATS

U.S. bean exports to Haiti show that pinto beans continue to dominate the market, although with a slight decrease of 5.3% (from 2,009 to 1,903 tons) during the September–January 2024/2025 period, representing 69% of the total volume. Black beans, the second most important variety, recorded a 16.7% reduction (from 1,027 to 855 tons), accounting for the remaining 31%. The export structure remains highly concentrated in these two varieties, which together represented 100% of shipments during this period (2,758 tons). Although both varieties showed decreases, pinto beans demonstrated greater relative stability compared to the more pronounced decline in black beans. This dynamic reflects Haitian demand that, while declining, continues to favor pinto beans as the main variety.

14. GUADALUPE

14.1
VOLUME OF DRY BEAN EXPORTS FROM THE UNITED STATES TO GUADALUPE

FIGURE 44. *U.S. exports of dried beans to Guadalupe (2019 / 2024) (Sep - Jan 2024/25)*



Source: USDA - GATS

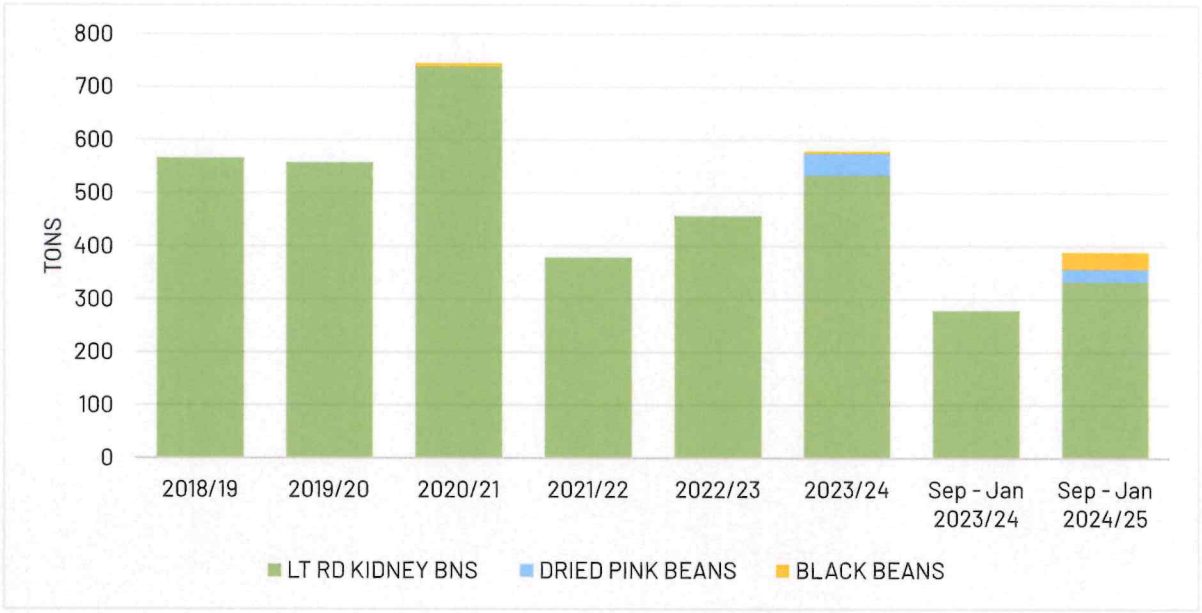
U.S. bean exports to Guadeloupe show a significant recovery in the September–January 2024/2025 period, with an increase of 39.1% (388 tons) compared to the same period of the previous year (279 tons). This growth surpasses the total volume exported in full years such as 2021/22 (378 tons) and 2022/23 (457 tons). The first five months of 2024/25 already represent 67% of the total for 2023/24 (579 tons), indicating a possible recovery to pre-pandemic levels (580 tons in 2018/19).

GUADALUPE

14.2

U.S. EXPORTS OF DRIED BEANS TO GUADALUPE BY BEAN TYPE (2019 / 2024) (SEP - JAN 2024/25)

FIGURA 45. *U.S. exports of dried beans to Guadalupe by bean type*



Source: USDA - GATS

U.S. bean exports to Guadeloupe show that Light Red Kidney Beans increased by 19.4% (from 279 to 333 tons), representing 85.8% of total exports in 2024/25. Black Beans, which had no previous records in this period, appeared with 31 tons (8% of the total). Dried Pink Beans, which had recorded 40 tons in 2023/24, decreased to 24 tons in the latest period (6.2% of the total).