



USDBC Mexico Report

2025 Mexico Crop and Market Update
September 2025 USDBC Report



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USDBC Mexico September 2025 Monthly Report

MEXICO - 2025 Spring-Summer Bean Crop Cycle Special Weekly Seasonal Report – Week of October 6th, 2025

Important Facts of the Spring-Summer Cycle for beans:

Relevance: Most important bean production season, contributing with 75% of the black and pinto beans for the year. Mexican beans are produced in two cycles: Spring-Summer and Fall Winter

Planting: IRRIGATED BEANS IN MAY-JUNE. DRYLAND BEANS IN JUNE-JULY-AUGUST
95% dryland: around 26% planted in June, 48% in July and around 15% in August.
Remaining 10% irrigated planted in May and early June

Harvesting: Late September for the irrigated. October and November for dryland beans
Most important states: beans in Mexico are planted in all states, however, the most important with commercial production, followed by the USDBC: Zacatecas, Durango, Chihuahua, San Luis Potosi and Guanajuato.

Situation until October 6th, 2025

SADER and SEGALMEX: Producers are putting pressure over the government to increase the prices guarantee, from MX\$27 to MX\$30 / US\$1,459 to US\$1,621 per MT.
Reportedly, the final price was negotiated at MX\$27 / US\$1,621 per MT, however, there has not been an official announcement from the authorities. SEGALMEX on the other hand, has not moved the old beans that are still in the warehouses at the production areas, that by now, should be empty, ready to receive the new crop. SEGALMEX has stated that they will increase +20% the volumes to be purchased this year, however, did not specify how much.

The **price guarantee**, as always, is **only for small producers, for up to 30 MT**, up to a limited volume that the government must announce. Nevertheless, **it is usually a reference price for the free market.**

Short update from contractor doing the Mexican Crop report, after delivering Report 1:

Zacatecas: Precipitations have favored the beans, there are still cloudy days and light rains, enough to help plants continue the cycle. There are no plagues or disease reported so far. It is estimated that in this state they will start cutting and harvesting in the third week of this month of October and into the first of November, as long as rain stops. Plants are in the last stage of pod filling, and yields are looking good, which means a higher production

Durango: Beans in the districts of Nuevo Ideal, Canatlán and Poanas, where Pintos are predominant, are expected to start cutting in the third week of October, with good yield

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expectations, however, there will be some losses due to excess of humidity in lower terrains. In the rest of the state, there is more presence of black beans, planted later, and harvesting will start in the last week of October and first of November. The constant precipitations are said to delay any risk of frosts, and yields are expected to be normal

Chihuahua. Beans are doing well; no damage has been detected to this date. Fields show good humidity, enough to finish the cycle. Cuisiriachi is the only bean district where excess of humidity was reported, and that could delay the harvesting. Bean plants starting to turn yellow, and producers are expected to start harvesting in the second week of October and first of November. Yields are expected to be higher, which would increase the state' production.

Guanajuato and San Luis Potosí. All normal, expecting to start harvesting in the third week of October. Yields are expected to be higher than average.

Government Progress Report: Until August 30th, the Government-SIAP reported that 90% of the beans had been planted, and reported 34,079 irrigated hectares had been harvested obtaining 31,318 MT.

GOVERNMENT'S OFFICIAL 2025 SPRING - SUMMER CYCLE MEXICO DRY BEANS PLANTING SEASON IRRIGATED + DRYLAND SITUATION UNTIL AUGUST 30, 2025								
STATE	SURFACE - HECTARES				PRODUCTION - MT		YIELD KG/HA	
	Government's Planting Intention hectares	Planted hectares according to Government	Harvested according to government	Damaged according to government	Government Expectation	Obtained according to Government	Expected by Government	Obtained according to Government
CHIAPAS	72,625	69,582	1,932	2	44,688	1,067	620	550
CHIHUAHUA	75,520	65,578	610	52	73,773	1,466	980	2,400
DURANGO	219,852	204,716	-	-	130,961	-	600	-
GUANAJUATO	46,230	38,583	1,342	343	37,373	2,745	810	2,050
GUERRERO	13,182	12,372	867	-	11,493	673	870	780
MEXICO	2,623	3,386	22	-	2,976	9	1,130	430
MICHOACAN	2,420	1,903	11	-	3,033	8	1,250	690
OAXACA	28,062	23,715	88	7	21,640	72	770	820
PUEBLA	42,789	38,775	16,396	-	37,200	13,757	870	840
QUERETARO	3,322	2,895	169	198	2,619	349	790	2,060
SAN LUIS POTOSI	123,256	117,443	858	-	67,658	1,175	550	1,370
ZACATECAS	630,714	627,885	7,052	-	331,701	4,813	530	680
OTHER	50,976	39,103	4,734	2,540	91,947	5,185	1,804	1,095
TOTAL	1,311,571	1,245,935	34,079	3,142	857,062	31,318	650	920

Source: Ag. Information agency SIAP

Mexican Market Situation October 6th, Update

-**Importers concerned** about saturated bean market, with enough stocks of imported beans purchased at high prices, now knowing that there will be a higher Mexican bean crop.

-The Mexican trade is worried about the low prices of beans in the production areas vs. their imported beans still in stock. New coming irrigated Zacatecas MX\$16,000 / US\$865 per MT. Flor de Mayo and Flor de Junio colored beans are being quoted also low at MX\$18,000 / US\$973 per MT, and MX\$20,000 / US\$1,081 per MT for Bayo beans at the production sites.



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-Reportedly, SEGALMEX will potentially have resources to purchase paying the Price Guarantee, up to 200,000 MT from the new bean crop, -which the government expects to reach around 900,000 MT total production. However, state governments of Zacatecas and Durango are reportedly asking to lower the Price Guarantee to increase the volume of beans collected for the social programs, benefiting more producers.

-Argentinean black beans are being offered at US\$780 per MT, and Brazilians are offering at US\$760 per MT, both delivered at Veracruz port.

- Accumulated US bean imports in the September 2024 – August 2025 Commercial Year 2025, reached 215,335 MT / US\$225,654,291 with 77% of the market share:

2021-2025 September to August - U.S. DRY BEANS to MEXICO - USDA COMMERCIAL YEAR IMPORTS according to Mexican Customs Data															
TARIFF CODE / DESCRIPTION	2021			2022			2023			2024			2025		
	MT	US\$	Market Share %	MT	US\$	Market Share %	MT	US\$	Market Share %	MT	US\$	Market Share %	MT	US\$	Market Share %
Black, pinto, white and other beans 0713.33.99	n/a	n/a		n/a	n/a		n/a	n/a		n/a	n/a		n/a	n/a	
	n/a	n/a		n/a	n/a		n/a	n/a		n/a	n/a		n/a	n/a	
	210,016	188,214,078	90%	61,622	69,555,586	92%	145,773	171,509,346	84%	331,777	403,389,678	73%	215,335	225,654,291	76%
TOTAL	210,016	\$188,214,078	90%	61,622	\$69,555,586	92%	145,773	\$171,509,346	84%	331,777	\$403,389,678	73%	215,335	\$225,654,291	76%

Source: Prepared by Mercalimentos with Mexican Customs data

- Total Bean imports from all origins in the full Commercial Year 2025, accumulated 281,981 MT / US\$301,503,202 million. Breakdown is as follows:

COO	CY - 2025		
USA	215,335	225,654,291	76%
CAN	30,508	37,739,941	11%
ARG	25,268	27,503,649	9%
BRA	10,729	10,355,403	3%
BOLIVIA	72	93,600	1%
CHINA	67	156,318	0%
TOTAL	281,979	301,503,202	100%

Source: Prepared by Mercalimentos with Mexican Customs data

COUNTRY OF ORIGIN	2025		2024		2023	
USA	215,335	76%	331,777	72%	145,773	84%
CAN	30,508	11%	64,845	14%	16,024	9%
ARG	25,268	9%	32,168	7%	11,751	6%
BRA	10,729	3%	24,010	5%	0	0%
BOLIVIA	72	1%	443	0.5%	192	1%
CHINA	67	0%	3,533	1.5%	0	0%
TOTAL	281,979	100%	453,243	100%	173,740	100%

Source: Prepared by Mercalimentos with Mexican Customs data

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USDA COMMERCIAL YEAR SEPTEMBER 2024/AUGUST 2025 Mexico's Dry Bean Imports-All Origins					
All beans: pintos, black, white, all 0713.33.99	COUNTRY OF ORIGIN	VOLUME IN KILOGRAMS	VOLUME METRIC TONS	Year's. market share USA 76%	COMMERCIAL VALUE \$USD
TOTAL	ALL	281,980,885	281,981		\$290,503,202
August 2025	USA	17,528,232	17,528	68%	16,597,513
August 2025	BRAZIL	1,797,450	1,798	7%	1,352,850
August 2025	ARGENTINA	4,624,240	4,624	17%	3,476,897
August 2025	CANADA	1,977,084	1,977	8%	1,854,850
August 2025	BOLIVIA	0	-	0.0%	0
Subtotal		25,927,006	25,927	100%	\$23,282,110
July 2025	USA	17,342,505	17,342	88%	17,156,333
July 2025	BRAZIL	1,738,792	1,739	9%	1,610,823
July 2025	CANADA	500,000	500	2%	386,250
July 2025	ARGENTINA	249,260	249	1%	171,508
Subtotal		19,830,557	19,830	100%	19,324,914
June 2025	USA	15,635,137	15,635	80%	15,232,990
June 2025	CANADA	2,329,583	2,329	11%	2,299,651
June 2025	BRAZIL	1,113,550	1,114	6%	922,086
June 2025	ARGENTINA	500,000	500	3%	390,190
June 2025	BOLIVIA	0	-	0%	0
Subtotal		19,578,270	19,578	100%	18,844,917
May 2025	USA	20,072,554	20,073	82%	19,623,349
May 2024	CANADA	2,554,580	2,554	10%	2,678,214
May 2024	BRAZIL	1,605,000	1,605	7%	1,420,900
May 2024	CHINA	0	0	0.0%	0
May 2024	ARGENTINA	250,000	250	1.0%	203,203
Subtotal		24,482,134	24,482	100%	23,925,666
April 2025	USA	22,904,454	22,904	81%	23,296,087
April 2025	CANADA	4,805,060	4,805	17%	5,126,991
April 2025	ARGENTINA	0	-	0%	0
April 2025	CHINA	0	0	0%	0
April 2025	BRAZIL	500,000	500	2%	464,250
Subtotal		28,209,514	28,209	100%	28,887,328
March 2024	USA	20,816,663	20,816	84%	21,892,098
March 2025	CANADA	3,579,844	3,580	15%	3,855,884
March 2025	BRAZIL	250,000	250	1%	227,500
March 2025	CHINA	24,971	25	0%	74,766
Subtotal		24,671,478	24,671	100%	26,050,248
February 2025	USA	14,246,698	14,247	90%	15,021,206
February 2024	CANADA	1,482,388	1,482	9%	1,614,355
February 2024	ARGENTINA	0	-	0%	0
February 2024	CHINA	42,000	42	1%	81,552
Subtotal		15,771,086	15,771	100%	16,717,113
January 2025	USA	9,602,620	9,603	70%	10,081,604
January 2025	CANADA	3,675,598	3,676	27%	3,983,869
January 2025	ARGENTINA	0	-	0%	0
January 2025	CHINA	0	0	0%	0
January 2025	BRAZIL	500,000	500	3%	550,000
Subtotal		13,778,218	13,778	100%	14,615,473
December 2024	USA	8,076,579	8,077	91%	8,820,756
December 2024	CANADA	698,433	698	8%	792,887
December 2024	BOLIVIA	72,000	72	2%	93,600
Subtotal		8,847,012	8,847	100%	9,707,243
November 2024	USA	18,332,953	18,333	73%	20,231,283
November 2024	CANADA	2,864,135	2,864	11%	3,176,263
November 2024	ARGENTINA	3,078,260	3,078	12%	3,555,813
November 2024	BRAZIL	1,000,000	1,000	4%	1,170,000
Subtotal		25,275,348	25,275	100%	28,133,359
October 2024	USA	30,101,643	30,102	70%	33,718,114
October 2024	CANADA	4,909,328	4,909	11%	5,567,428
October 2024	ARGENTINA	7,555,050	7,555	18%	8,796,702
October 2024	BRAZIL	375,000	375	1%	454,750
Subtotal		42,941,021	42,941	100%	48,536,994
September 2024	USA	20,675,243	20,675	63%	23,982,958
September 2024	ARGENTINA	9,012,290	9,012	28%	10,909,336
September 2024	BRAZIL	1,847,600	1,848	6%	2,182,244
September 2024	CANADA	1,134,108	1,134	3%	1,403,299
Subtotal		32,669,241	32,669	100%	38,477,837



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Agricultural Year Summary - Mexican Bean Crop – Government Numbers

2020-2025 Information obtained from the Agricultural Years' Official Closing including Spring-Summer and Fall-Winter cycles

*Government numbers used here, are only a reference, as these are potentially 30% higher than reality

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

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

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

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



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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 September vs. August 2025:** Prices were steady in the three most important markets at MX\$28 / US\$1.51 per kilo avg. **Mexican black beans avg. price was very similar** as US black beans.
- **US Pinto beans prices in September vs. August 2025,** mostly steady MX\$27 / US\$1.45 per kilo avg. Mexican pinto prices very similar
- **U.S. Large and Small Alubias Prices in September vs. August 2025,** with small reductions of -6%, around MX\$31 / US\$1.67 per kilo
- **Peruanos, Mayocoba, Azufrados prices in September vs. August 2025,** remained at prices from MS\$29 to MX\$33 - US\$1.45 to US\$1.6 per kilo.
- **Mexican colored varieties: Bayos, Canario, Cacahuete, Flor de Mayo and Flor de Junio prices, September vs. August 2025** with some reductions however still at high prices around MX\$32 / US\$1.60 per kilo. Bayo beans continue at very high prices of up to MX\$59 / US\$2.90 per kilo
- **Mexican Small & Large Garbanzos prices in September vs. August 2025,** large garbanzos in Mexico City, Monterrey and Guadalajara continued to have some reductions, however avg. prices remained around MX\$27 / US\$1.45 per kilo, down from MX\$33 / US\$1.65 per kilo in July



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MONTH: September 2025 vs. August 2025										
MONTHLY CENTRAL MARKET WHOLESALE AND SEMI-WHOLESALE REPORT										
PRODUCT VARIETY	product origin state / country	MEXICO CITY price (\$/KG)		VAR %	MONTERREY price (\$/KG)		VAR %	GUADALAJARA price (\$/KG)		VAR %
		current 09 30 25	past 08 30 25		current 09 30 25	past 08 30 25		current 09 30 25	past 08 30 25	
Imported Black	Imported	27.50	28.00	-1.79%	30.00	30.00	0.00%	29.00	29.00	0.00%
Jamapa Black	Zacatecas							26.00	26.00	0.00%
Nayarit Black	Nayarit	26.00	26.00	0.00%				24.00	24.00	0.00%
San Luis Black	Zacatecas	28.50	30.00	-5.00%				30.00	30.00	0.00%
Veracruz Black	Veracruz	35.00	35.00	0.00%						0.00%
Imported Pintos	Imported	26.50	28.00	-5.36%	27.00	27.00	0.00%	26.00	26.00	0.00%
Pinto Saltillo	Zacatecas									
Pinto Saltillo	Nayarit							25.00	25.00	0.00%
Pinto Saltillo	Chihuahua	27.00	27.00	0.00%	25.00	25.00	0.00%			0.00%
Pinto Saltillo	Durango						0.00%			
Small Alubia	Imported	30.00	30.50	-1.64%	33.00	32.00	3.13%	29.00	29.00	0.00%
Large Alubia	Imported	33.00	35.00	-5.71%	33.00	32.00	3.13%	30.00	32.00	-6.25%
Flor de Junio	Zacatecas	28.50	30.00	-5.00%				26.00	27.00	-3.70%
Flor de Mayo	Zacatecas	28.00	30.00	-6.67%				26.00	28.00	-7.14%
Bayo Berrendo	Jalisco							35.00	35.00	0.00%
Bayo	Zacatecas	39.00	39.00	0.00%				59.00	59.00	0.00%
Garbancillo	Zacatecas	46.50	46.50	0.00%						0.00%
Canario	Sinaloa							28.00	28.00	0.00%
Cacahuete Bola	Jalisco	36.50	37.50	-2.67%				39.50	28.00	41.07%
Garbancillo Zarco	Jalisco									0.00%
Azufrado	Sinaloa			0.00%				45.00	45.00	0.00%
Mayocoba	Sinaloa			0.00%				30.00	29.00	
Peruano	Sinaloa	28.50	29.00	-1.72%	34.00	33.00	3.03%	29.00	29.00	0.00%
Small Chickpea	Sinaloa	25.00	25.00	0.00%	25.00	27.00	-7.41%	26.00	27.00	-3.70%
Large Chickpea	Sinaloa	28.00	28.00	0.00%	25.00	27.00	-7.41%	30.00	29.00	3.45%

MONTH: September 2025 vs. August 2025										
MONTHLY CENTRAL MARKET WHOLESALE AND SEMI-WHOLESALE REPORT										
PRODUCT VARIETY	product origin state / country	SINALOA price (\$/KG)		VAR %	ZACATECAS price (\$/KG)		VAR %	CHIHUAHUA price (\$/KG)		VAR %
		current 09 30 25	past 08 30 25		current 09 30 25	past 08 30 25		current 09 30 25	past 08 30 25	
Imported Black	Imported									
Jamapa Black	Zacatecas				28.00	28.00	0.00%			
Nayarit Black	Nayarit									
San Luis Black	Zacatecas				25.00	24.00	4.17%			
Veracruz Black	Veracruz									
Imported Pintos	Imported							28.00	28.00	0.00%
Pinto Saltillo	Zacatecas				24.00	25.00	-4.00%			
Pinto Saltillo	Nayarit									
Pinto Saltillo	Chihuahua						0.00%	27.00	27.00	0.00%
Pinto Saltillo	Durango									
Small Alubia	Imported				30.00	30.00	0.00%	36.00	28.00	28.57%
Large Alubia	Imported				22.00	22.00	0.00%			
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				23.00	24.00	-4.17%	27.00	27.00	0.00%
Garbancillo	Zacatecas						0.00%	26.00		0.00%
Canario	Sinaloa									
Cacahuete Bola	Jalisco						0.00%			0.00%
Garbancillo Zarco	Jalisco						0.00%			0.00%
Azufrado	Sinaloa	32.00	32.00	0.00%						
Mayocoba	Sinaloa	28.00	28.00	0.00%						
Peruano	Sinaloa	28.00	29.00	-3.45%	30.00	30.00	0.00%			
Small Chickpea	Sinaloa				28.00	28.00	0.00%			
Large Chickpea	Sinaloa	25.00	25.00	0.00%	30.00	30.00	0.00%	36.00	36.00	0.00%

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MONTH: September 2025 vs. August 2025 MONTHLY CENTRAL MARKET WHOLESALE AND SEMI-WHOLESALE REPORT										
PRODUCT VARIETY	product origin state / country	NAYARIT price (\$/KG)		VAR %	YUCATAN price (\$/KG)		VAR %	DURANGO price (\$/KG)		VAR %
		current 09 30 25	past 08 30 25		current 09 30 25	past 08 30 25		current 09 30 25	past 08 30 25	
Imported Black	Imported									
Jamapa Black	Zacatecas									
Nayarit Black	Nayarit	36.00	36.00	0.00%						
San Luis Black	Zacatecas				28.00	28.00	0.00%	35.00	35.00	
Veracruz Black	Veracruz									
Chiapas Black	Chiapas									
Imported Pintos	Imported									
Pinto Saltillo	Zacatecas	n/a	n/a	0.00%	30.00	30.00	0.00%			
Pinto Saltillo	Nayarit	36.00	35.00	2.86%						
Pinto Saltillo	Chihuahua									
Pinto Saltillo	Durango							28.00	28.00	0.00%
Small Alubia	Imported				35.00	35.00	0.00%			
Large Alubia	Imported	56.00	56.00	0.00%						
Flor de Junio	Zacatecas	44.00	48.00	-8.33%						
Flor de Mayo	Zacatecas	44.50	49.00	-9.18%	45.00	45.00	0.00%	32.00	32.00	0.00%
Bayo Berrendo	Jalisco	n/a	n/a							
Bayo	Zacatecas	44.00	45.00	-2.22%	38.00	39.00	-2.56%	34.00	32.00	6.25%
Garbancillo	Zacatecas	56.00	58.00	-3.45%						
Canario	Sinaloa									
Garbancillo Zarco	Jalisco									
Azufrado	Sinaloa	54.00	54.00	0.00%						
Mayocoba	Sinaloa	n/a	n/a	0.00%						
Peruano	Nayarit	44.00	44.50	-1.12%	44.00	44.00		39.00	40.00	-2.50%

-Weather

CONAGUA's Mexico Drought Monitor September 30th: During the second half of September 2025, rainfall above the seasonal average was observed over the northwestern, northern, north-central, central, and some southern regions of Mexico, as well as parts of the Yucatán Peninsula. These rains were mainly caused by the passage of three tropical waves (No. 33, 34, and 35), the arrival of Cold Front No. 4, and low-pressure channels, as well as the formation and cloud detachment of Hurricane Narda near the Pacific coast of Mexico. The precipitation helped reduce areas affected by moderate to exceptional drought (D1 to D4) in the northwest and north of the country.

On the other hand, rainfall deficits were recorded in the northeast, eastern regions, parts of the south, and most of the Yucatán Peninsula. As a result, abnormally dry conditions (D0) and moderate to severe drought (D1 to D2) increased in these areas. As of September 30, 2025, the proportion of areas affected by moderate to exceptional drought (D1 to D4) nationwide stood at 7.6%, representing a 1.7% decrease compared to the figures reported on September 15 of the same year.



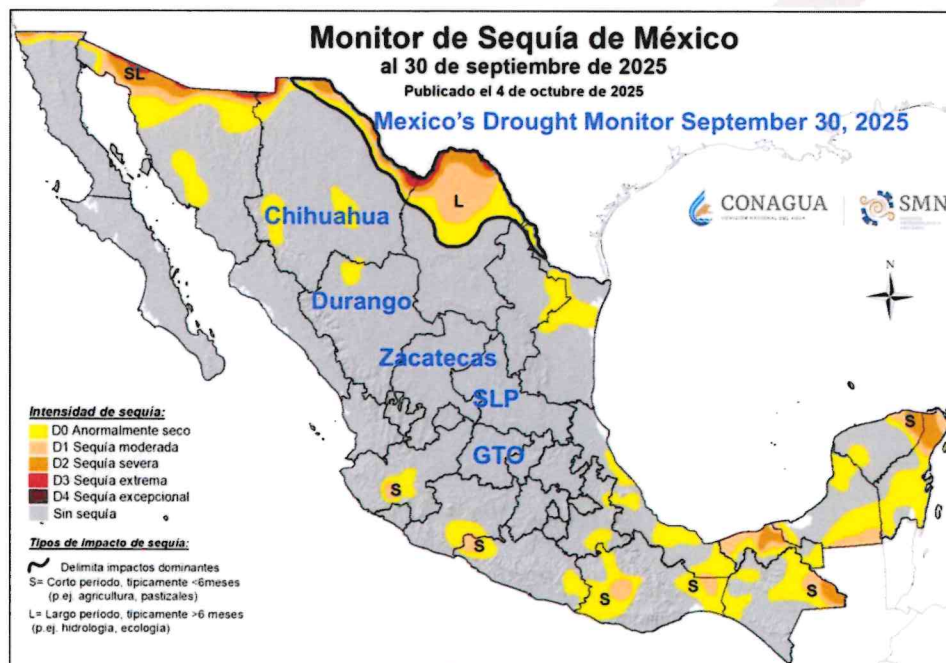
2025 Mexico Crop and Market Update - September

Mexico Weather and Climate Report – Second Half of September 2025

During the second half of September 2025, Mexico experienced contrasting weather conditions marked by above-average rainfall in several regions and persisting drought in others. The rainfall patterns were driven by tropical systems, low-pressure channels, and the first incursions of cold fronts associated with seasonal atmospheric transitions.

Rainfall Distribution and Drought Conditions. Rainfall above the historical average was observed over the northwestern, northern, north-central, central, and some southern regions, as well as parts of the Yucatán Peninsula. These rains were primarily caused by the passage of three tropical waves (Nos. 33, 34, and 35), the arrival of Cold Front No. 4, and the presence of low-pressure channels, in addition to the formation and cloud detachment of Hurricane Narda near Mexico's Pacific coast. Precipitation contributed to a reduction in areas affected by moderate to exceptional drought (D1–D4) across the northwest and north of the country. Conversely, rainfall deficits were reported in the northeast, eastern regions, portions of the south, and most of the Yucatán Peninsula, leading to an increase in abnormally dry (D0) and moderate to severe drought (D1–D2) conditions.

As of September 30, 2025, areas affected by moderate to exceptional drought (D1–D4) accounted for 7.6% of national territory—1.7 percentage points lower than recorded on September 15, 2025.



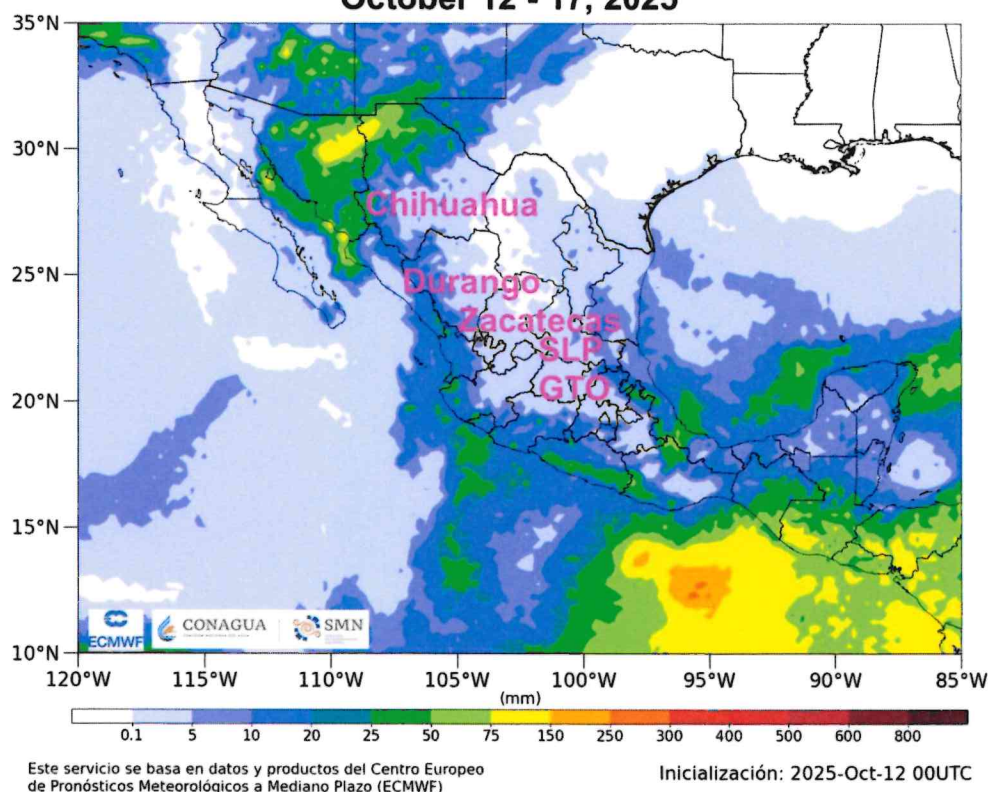
2025 Mexico Crop and Market Update - September

Meteorological Systems and Forecast. In October, low-pressure channels over the western Gulf of Mexico, southeastern Mexico, and the Yucatán Peninsula are forecast to interact with a developing low-pressure zone with potential cyclonic activity in the southern Pacific, as well as an upper-level cyclonic circulation moving across the western Gulf, and the eastern and northeastern regions of the country. These interactions are expected to generate showers and heavy to very heavy rains in the mentioned regions, with intense localized rainfall projected for Oaxaca and Chiapas.

A secondary low-pressure channel extending along the Sierra Madre Occidental and central Mexico, combined with moisture inflow from both the Pacific Ocean and the Gulf of Mexico, as well as upper-level divergence, will produce showers and isolated strong rains in the northern and central regions, and strong localized rainfall in the western states.

Tropical Wave No. 37 will move across western Mexico, further reinforcing rainfall potential in that region.

**Accumulated Precipitation Forecast Valid
October 12 - 17, 2025**





2025 Mexico Crop and Market Update - September

Finally, a new cold front associated with the subtropical jet stream is expected to enter and move across northwestern Mexico, producing strong wind gusts and possible temperature drops in localized areas.

Overall, late September 2025 marked a period of increased atmospheric instability, typical of seasonal transition. The combination of tropical and frontal systems helped ease drought in northern states, while southeastern and Yucatán regions continued to experience rainfall deficits. Short-term forecasts indicate sustained rainfall activity in the south and west of the country, with localized risks of flooding in Oaxaca and Chiapas, and wind impacts expected in the northwest.

Trade Policy Update:

-Tariff 25% on all imported medium- and heavy-duty trucks, to take effect on November 1, 2025. The measure follows a Section 232 national-security investigation and would apply regardless of origin, affecting Mexico as the largest supplier of U.S. heavy trucks. Under USMCA, qualifying North American trucks have enjoyed tariff-free access if content thresholds are met; the new sector-wide tariff would override that advantage at the U.S. border unless exemptions are issued.

- MRL'S Prohibition update: In the first days of September, Secretary of Agriculture Julio Berdegue, announced the new **Plan to Eradicate Toxic Pesticides** for a cleaner agriculture. The new plan contemplates the ban of 35 including DDT. **Secretary Berdegue stated that Glyphosate will not be banned until a substitute is found.** Previously 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.

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

-Steel, Aluminum, Beer, Beer Cans and Cars made in Mexico, On June 3rd, President Trump announced the increase of these tariffs to 50%, -up from 25% last month, effective first minute of June 4th



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-**Mexican Tomatoes** receiving 20.91% tariff starting July 14, 2025, ending a bilateral agreement signed in 2019, due to dumping prices, unfair for US tomato producers. The Mexican government consider these as unfair, but is not announcing retaliation

-**Mexico-Texas Water 1944 Treaty:** Mexico started supplying water to Texas in the third week of April, after President Trump threatened to impose tariffs if Mexico continued to fail complying with this treaty

-**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.





2025 Mexico Crop and Market Update - September

Mexico Economic Report – September 2025

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

Mexico's Main Economic Indicators	Information Available October 3rd, 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. September 2025	MX\$18.51 / MX\$19.05 June / USD. MX\$20.09 Apr
Unemployment Rate August 2025	2.90%
Inflation Rate Y/accu to September 2025 est.	3.76% up from 3.5% in July 2025
Mexican Crude Oil Price Oct. 3, 2025	US\$57.88 per barrell
International Reserves Oct 3, 2025	US\$247.7 billion
Trade Balance Imports-Exports Y2024 USA-MX	US\$839.9 billion both ways

-Mexico is entering Q4 2025 with resilient growth supported by nearshoring-led manufacturing, robust formal employment and strong U.S. demand, but faces rising policy uncertainty tied to U.S. trade actions, -most notably a 25% tariff on imported medium- and heavy-duty trucks set to start on November 1, 2025, and the 2026 USMCA joint review.

-President Sheinbaum's **Plan México seeks to reinforce domestic demand**, energy reliability and strategic investment **while discouraging imports from non-FTA partners**. Business sentiment remains constructive provided regulatory predictability improves and frictions with the US administration, are being well managed so far Mexico continues to be the United States' top or near-top goods trading partner. Supply-chain integration pushes growth but Mexico remains at risk with U.S. policy shifts

-**Inflation** has moderated versus 2023–24 peaks but remains above target; Mexican Central Bank-Banxico, remains cautious but positive. According to INEGI, Mexico's annual headline inflation reached **3.76% in September 2025, up slightly from 3.57% in August**. Despite this uptick, inflation remains within BANXICO's target range of 3% $\pm$ 1 percentage point. Core inflation, registered 4.28%, reflecting persistent pressures in services and certain imported goods.

inflation expected to close the year around 3.9%, aligned with Banxico's target

-During the **World Economic Forum's Country Strategy Meeting on Mexico**, celebrated in Mexico City, Oct 7–8, 2025, WEF President Børge Brende highlighted Mexico's strategic position to capture nearshoring and digital-economy opportunities and **emphasized the importance of predictability for investors**. Recommendations centered on: ensuring regulatory certainty and rule of law; expanding reliable, cleaner energy and water infrastructure to unlock industrial investment; deepening North American integration while diversifying trade; and advancing skills and inclusion to meet AI-era labor needs.

-**USMCA**. With the start of review talks and in the frame of President Trump's recent comments on making separate bilateral agreements with Mexico and Canada, the Mexican Secretary of Economy Marcelo Ebrard, stated that Mexico will defend the three parties USMCA, to stay as it is. Key agenda items expected in 2026 include automotive rules of origin and content

2025 Mexico Crop and Market Update - September

thresholds, energy and state-owned enterprises, labor enforcement, digital trade/data localization, and dispute procedures. On the Mexican side, some voices from the political left in agriculture, have recently made comments about getting grains and oilseeds out of the USMCA to benefit Mexican producers, however, they do not know-take into account that Mexico can only produce 42% of these foods.

-No go for Mexico-Brazil FTA. Mexico has once again paused negotiations toward a FTA with Brazil, despite both countries being Latin America's largest economies. The long-standing effort to deepen trade integration continues to face structural and political barriers. A recent visit by a high-level Brazilian delegation failed to yield progress, highlighting the distance between both nations' regulatory and agricultural priorities. Mexican Secretary of Agriculture Julio Berdegué confirmed that **Mexico has no plans to pursue an FTA with Brazil in the near term**. According to Berdegué, **Brazil requested that Mexico relax its strict phytosanitary and zoosanitary import protocols**, to allow greater access for Brazilian livestock and agricultural goods. **Mexico firmly rejected the proposal, citing national interests in food safety and the protection of its export reputation**.

-Exchange Rate. The Mexican peso (MXN) has shown relative stability in the past 30 days, trading between 18.3 and 18.7 pesos per U.S. dollar, with mild appreciation toward mid-October 2025. The peso remains one of the most stable emerging market currencies, supported by strong remittances, steady FDI inflows from nearshoring, and Banxico's credible monetary stance. However, risks stemming from U.S. trade measures and the upcoming USMCA review could increase short-term volatility.



World Economic Forum Meeting on Mexico



USDBC Mexico Report

2025 Mexico App & Social Media
September



US Dry Bean Council Representation Office Mexico City
Mercialimentos Consultores SC
info@mercalimentos.com

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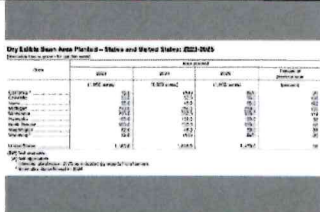
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Latest published News

19/09/25	Beans: A Surprising Ally for Weight Management	
15/08/25	The Benefits of Dry Beans for Restaurants	
18/07/25	Why Beans Are the Ultimate Future-Proof Ingredient	
16/06/25	The Sustainability of U.S. Beans	
15/05/25	Beans contain the nutrients and benefits found in both vegetable and non-meat protean sources.	
15/04/25	Prospective Plantings 2025 - Dry Edible Pea Area Planted	
14/03/25	The Use of Bean Flour: Quality and Nutritional Contribution	



2025 Mexico App & Social Media - September

iTunes Store

September 1st - 30th App Impressions on iTunnes: 5,270 Downloads: 9



App Life Time Results
App Impressions iTunnes: 28,100 Downloads: 439



Top Countries
United States: 3
Taiwan: 3
India: 2
Argentina: 1

Descargas totales por territorio [Ver todo](#)

Estados Unidos	3
Taiwán	3
India	2
Argentina	1

Top Countries
United States: 243
Mexico: 60
Canada: 11
Costa Rica: 11
Colombia: 10

Descargas totales por territorio [Ver todo](#)

Estados Unidos	243
México	60
Canadá	11
Costa Rica	11
Colombia	10



2025 Mexico App & Social Media - September

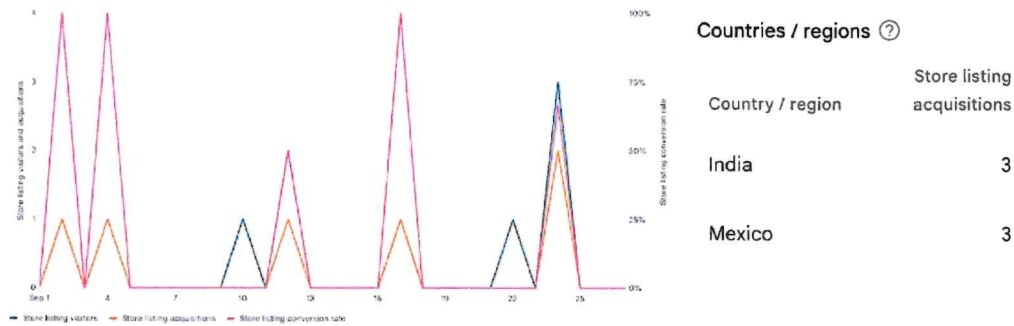
Play Store

September 1st - 28th
Store listing visitors: 10
Downloads: 6

Top Countries
India: 3
Mexico: 3

Store listing visitors [?]
10
+150% ▲ vs. previous period

Store listing acquisitions [?]
6
+200% ▲ vs. previous period



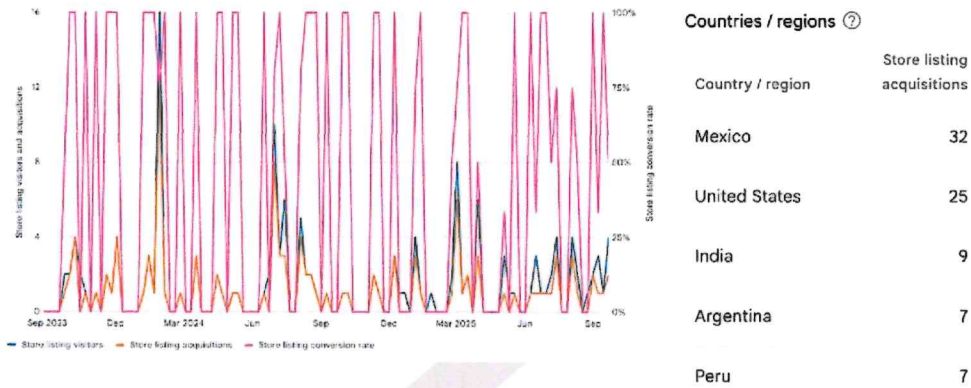
All Time
Store listing visitors: 152
Downloads: 113

Top Countries
Mexico: 32
United States: 25
India: 9

Peru: 7
Argentina: 7

Store listing visitors [?]
152

Store listing acquisitions [?]
113



Total Results (Android & IOS)

September 2025 - Installs: 15
Total all time - Installs: 552

2025 Mexico App & Social Media - September

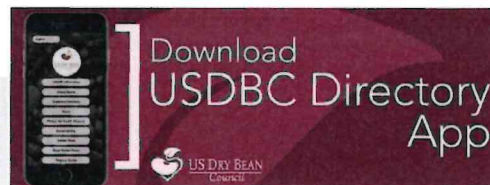
This month, the app users had an increase of 15 new users on both platforms, reaching 552 app users.

This month we had more regular app views on the iTunes Store, having 5,270 views; we normally have around 3,000. Unfortunately, we only had 9 downloads, more than the 5 of last month.

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

We also sent emails inviting importers from Latin America to download the app. 1,941 emails were sent in Spanish to Latin-American importers, with at least 641 confirmed openers.

Email promoting the USDBC app:



Estimados amigos,

Los invitamos a descargar la App del Consejo Americano del Frijol que se encuentra disponible en las tiendas iTunes y Play Store para iPhone y Android. En la ella tendrán acceso al directorio de exportadores de frijoles de EE. UU., a las últimas noticias de la industria, precios del mercado, próximos eventos, solicitar cotizaciones y mucho más.

Tenemos un sitio web con más información y tutoriales sobre la aplicación. Visite <http://usa.drybean.org/>

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

[iTunes](#) | [Google Play Store](#)



Si tiene alguna duda o pregunta, no dude en ponerse en contacto conmigo por correo electrónico en viclor@mercaderes.net

Victor Leal
viclor@mercaderes.net
Smart Phone Application Team



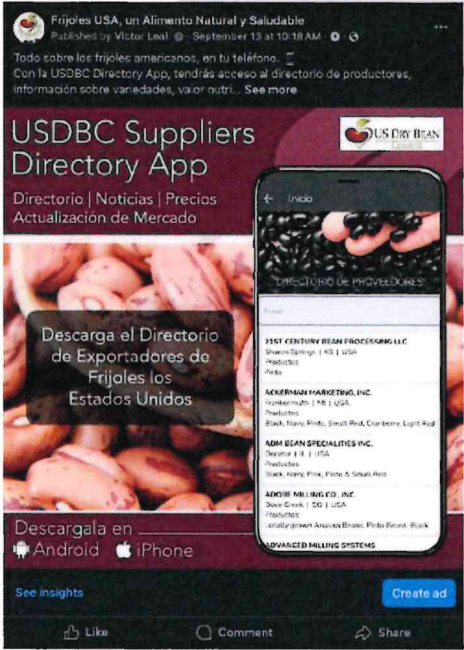


2025 Mexico App & Social Media - September

App social media promotion

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

September, 13



Sep, 30



Frijol USA Facebook Posts - September 12 Facebook posts

MONTH	TOTAL REACH	ORGANIC REACH	PAID REACH	TOTAL IMPRESSIONS	ORGANIC IMPRESSIONS	PAID IMPRESSIONS
SEPTEMBER	96	96	-	326	326	-
TOTAL	2,651	2,651	-	954	954	-
MONTH	TOTAL LIKES	TOTAL TIMES SHARED	TOTAL COMMENTS	TOTAL VIEWS	ORGANIC VIEWS	PAID VIEWS
SEPTEMBER	4	-	-	13	13	-
TOTAL	396	4	-	183	183	-

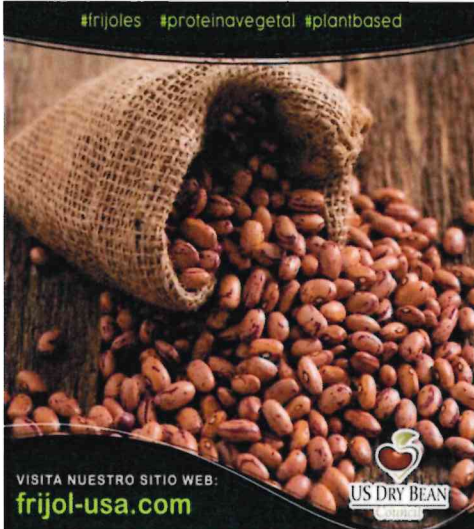
2025 Mexico App & Social Media - September

SEPTEMBER, 1

Frijoles USA, un Alimento Natural y Saludable
Publicado por Perla Ram · 1 de septiembre a las 1:00 p. m.

Los frijoles son fuente de proteína vegetal, fibra, hierro y antioxidantes. Inclúylos en tu dieta diaria es cuidar tu salud de forma deliciosa y práctica. ¡Nutrición q... Ver más

#frijoles #proteinavegetal #plantbased



VISITA NUESTRO SITIO WEB:
frijol-usa.com

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SEPTEMBER, 3

Frijoles USA, un Alimento Natural y Saludable
Publicado por Perla Ram · 3 de septiembre a las 11:59 a. m.

Por separado los frijoles y arroz aportan nutrientes importantes; pero juntos forman una proteína completa, es decir, contienen todos los aminoácidos esenciales que tu ... Ver más

Proteína Completa



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SEPTEMBER, 4

Frijoles USA, un Alimento Natural y Saludable
Publicado por Xavi Mjángos · 4 de septiembre a las 12:02 p. m.

OPA DE ALUBIAS, TOCINO Y ELOTE... Ver más

#frijoles #baseplantas #plantbased #proteinavegetal #hazjercicio



Receta

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SEPTEMBER, 9

Frijoles USA, un Alimento Natural y Saludable
Publicado por Perla Ram · 9 de septiembre a las 11:59 a. m.

Cuidar al planeta también empieza desde la mesa. Durante su cultivo, los frijoles fijan nitrógeno en el suelo, lo que mejora su fertilidad de forma natural y reduce la ... Ver más

#frijoles #plantbased #proteinavegetal



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SEPTEMBER, 12

Frijoles USA, un Alimento Natural y Saludable
Publicado por Perla Ram · 12 de septiembre a las 11:59 a. m.

Si buscas mantenerte satisfecho por más tiempo, los frijoles son una excelente opción. Su alto contenido de fibra ayuda a controlar el apetito, mejorar la digestión y... Ver más

#frijoles #proteinavegetal #plantbased

Snack Saludable



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SEPTEMBER, 15

Frijoles USA, un Alimento Natural y Saludable
Publicado por Perla Ram · 15 de septiembre a las 11:59 a. m.

De guarnición, como base o como protagonista del plato, los frijoles siempre encontrarán su lugar en la cocina. Su versatilidad permite preparar desde recetas rápidas ... Ver más

#frijoles #proteinavegetal #plantbased



Frijoles

Versatilidad en la cocina

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2025 Mexico App & Social Media - September

SEPTEMBER, 16

Frijoles USA, un Alimento Natural y Saludable
Publicado por Perla Ram 16 de septiembre a las 11:59 a. m.

Septiembre sabe a fiesta y tradición 🇲🇪. Y en estas fechas, los frijoles siempre están presentes en los antojitos, guisos y celebraciones. Además de su sabor auténtico... Ver más

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SEPTEMBER, 19

Frijoles USA, un Alimento Natural y Saludable
Publicado por Perla Ram 19 de septiembre a las 11:59 a. m.

Si piensas en superfoods, quizá imaginas ingredientes lejanos o exóticos... pero los frijoles son un superfood de todos los días. Ver más

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SEPTEMBER, 23

Frijoles USA, un Alimento Natural y Saludable
Publicado por Perla Ram 23 de septiembre a las 11:59 a. m.

Los frijoles son una de las fuentes más completas de proteína vegetal. Ayudan a mantener con energía durante el día y a fortalecer tus músculos sin necesidad de recurrir... Ver más

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Me gusta Comentar Compartir

SEPTEMBER, 26

Frijoles USA, un Alimento Natural y Saludable
Publicado por Perla Ram 26 de septiembre a las 11:59 a. m.

¿Sabías que los frijoles secos pueden conservar sus nutrientes hasta por dos años? Gracias a su larga vida de anaquel, son un alimento práctico para tener siempre en... Ver más

#frijoles #proteinavegetal #plantbased

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Me gusta Comentar Compartir

SEPTEMBER, 30

Frijoles USA, un Alimento Natural y Saludable
Publicado por Perla Ram 30 de septiembre a las 11:59 a. m.

Un plato de frijoles siempre sabe a casa 🏡. Este ingrediente ha acompañado a generaciones, aportando proteína, fibra, hierro y antioxidantes que ayudan a mantener el co... Ver más

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Me gusta Comentar Compartir

SEPTEMBER, 30

Frijoles USA, un Alimento Natural y Saludable
Publicado por Victor Lora 30 de septiembre a las 10:25 a. m.

¡Conecta con la industria de los frijoles de EEUU! Ver más

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