USDBC Mexico Report

2026 Mexico Crop and Market Update
April USDBC Report

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USDBC Mexico April 2026 Monthly Report

Resuming Mexico's 2026 Spring-Summer Dry Bean Cycle Follow up
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 bean 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**.

2026 SS-PLANTING INTENTION. SADER- Mexican Department of Agriculture published on May 8th the 2026 Spring Summer Cycle Dry Government Dry Bean Planting Intention of 1.3 million hectares, calculating average yields of 650 kilos per hectare, and expecting a production of around 850 thousand MT, this is practically the same as the 2025 government's planting intention of 1,311,571 hectares, and a production of only 2 thousand MT more than the expected in 2026. Unfortunately, SIAP, the Agricultural Information System Agency, has been downgraded by the Mexican government and is now a small office with a short headcount, no longer doing ground assessments, and is now only calculating areas based on past numbers. As time has proven it is important to consider that SIAP's expectation numbers may be 20% to 30% higher than reality. We will continue following up on weather and planting conditions and report accordingly. As reference in the next page is the 2025 Spring-Summer cycle's report until February 2026.

Agricultura | DGSIAP
Secretaría de Agricultura y Desarrollo Rural

Dirección General del Servicio de Información Agroalimentaria y Pesquera

Mexican Department of Ag. 2026 Spring-Summer Mexico's Dry Bean Planting and Production Intention

Ag. Production
Year: 2026
Cycle: Spring-Summer
Mode: irrigated + Dryland
Crop: Dry Beans

No.	Entity Key	STATE	Government's Expected Surface to be planted - hectares	Production expected by the government	Government's Expected yield kilos per hectare
1	01	Aguascalientes	1,184.300	1,244.920	1,050
2	03	Baja California Sur	190.000	276.100	1,450
3	04	Campeche	75.000	54.000	720
4	05	Coahuila	2,065.000	1,038.370	500
5	07	Chiapas	70,680.790	42,907.740	610
6	08	Chihuahua	76,848.000	76,665.770	1,000
7	09	Ciudad de México	42.800	42.350	990
8	10	Durango	232,294.500	137,893.040	590
9	11	Guanajuato	37,185.500	33,071.130	890
10	12	Guerrero	13,208.560	10,310.960	780
11	13	Hidalgo	15,319.950	13,425.570	880
12	14	Jalisco	8,318.500	5,203.990	630
13	15	México	2,456.860	2,748.390	1,120
14	16	Michoacán	2,966.000	3,912.900	1,320
15	17	Morelos	254.120	423.630	1,670
16	18	Nayarit	68.000	55.040	810
17	19	Nuevo León	593.400	495.390	830
18	20	Oaxaca	29,195.070	22,644.910	780
19	21	Puebla	40,460.830	35,844.780	890
20	22	Querétaro	2,569.000	2,031.600	790
21	23	Quintana Roo	250.000	154.000	620
22	24	San Luis Potosí	117,284.500	64,365.280	550
23	25	Sinaloa	3,130.000	3,117.630	1,000
24	26	Sonora	1,793.000	3,344.260	1,870
25	28	Tamaulipas	6,110.800	4,899.990	800
26	29	Tlaxcala	2,063.750	2,002.260	970
27	30	Veracruz	13,635.590	9,710.700	710
28	31	Yucatán	9.000	3.520	390
29	32	Zacatecas	630,875.020	371,841.640	590
Total			1,311,127.84	849,729.86	650

Source: SIAP - SADER Mexican Department of Agriculture

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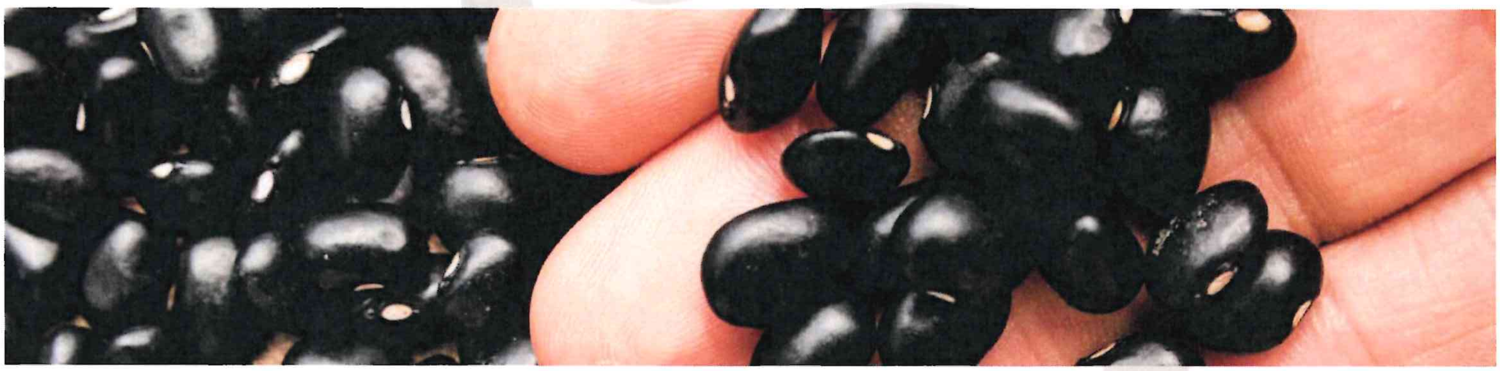
GOVERNMENT'S OFFICIAL 2025 SPRING - SUMMER CYCLE MEXICO DRY BEANS END OF SEASON IRRIGATED + DRYLAND SITUATION UNTIL FEBRUARY 28, 2026								
	SURFACE - HECTARES				PRODUCTION - MT		YIELD KG/HA	
STATE	Government's Planting Intention hectares	Planted hectares according to Government	Harvested according to government	Damaged according to government	Government Expectation	Obtained according to Government	Expected by Government	Obtained according to Government
CHIAPAS	72,625	71,728	70,272	2	44,688	43,114	620	610
CHIHUAHUA	**75,520**	**71,148**	**67,314**	**734**	**73,773**	**76,506**	**980**	**1,140**
DURANGO	**219,852**	**204,957**	**76,443**	**79**	**130,961**	**52,311**	**600**	**680**
GUANAJUATO	**46,230**	**38,598**	**37,058**	**372**	**37,373**	**46,873**	**810**	**1,260**
GUERRERO	13,182	12,386	12,386	-	11,493	9,770	870	790
MEXICO	2,623	3,437	2,658	750	2,976	2,856	1,130	1,070
MICHOACAN	2,420	1,903	1,703	100	3,033	1,854	1,250	1,090
OAXACA	28,062	24,461	22,838	8	21,640	17,246	770	760
PUEBLA	42,789	38,801	38,772	-	37,200	32,089	870	830
QUERETARO	3,322	2,895	2,552	343	2,619	2,009	790	790
SAN LUIS POTOSI	**123,256**	**117,970**	**108,964**	**8,555**	**67,658**	**60,647**	**550**	**560**
ZACATECAS	**630,714**	**635,728**	**629,397**	**46**	**331,701**	**483,010**	**530**	**770**
OTHER	50,976	46,162	33,606	4,019	91,947	30,183	1,804	898
TOTAL	**1,311,571**	**1,270,174**	**1,103,964**	**15,009**	**857,062**	**858,467**	**650**	**780**

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



MEXICO WEATHER FOLLOW-UP – 2026 SPRING-SUMMER CYCLE
SOURCE: CONAGUA and MEXICAN METEROLOGICAL SERVICE

CONAGUA. During the second half of April, the interaction of various atmospheric systems—including the subtropical jet stream, four cold fronts, upper-level troughs, and low-pressure systems—led to above-average rainfall in the northeast and central parts of the country. These rains contributed to a reduction in areas experiencing moderate to exceptional drought (D1 to D4) in northern Coahuila, Nuevo León, and Tamaulipas. In contrast, in the northwest and south of the country, as well as along the Gulf of Mexico coast and the Yucatán Peninsula, rainfall was below the climatological average. Additionally, various anticyclonic systems at mid-levels of the atmosphere—notably the one associated with the heat wave that occurred during the last week of April—favored warmer and drier conditions across much of the country. As a result, areas with abnormally dry conditions (D0) increased in the Baja California Peninsula, Sonora, Sinaloa, Chiapas, and the border region between San Luis Potosí, Querétaro, Hidalgo, and Veracruz. As of April 30, 2026, the percentage of areas experiencing moderate to exceptional drought (D1 to D4) nationwide was 3.8%, representing a slight decrease (0.5%) compared to the end of March of the same year.

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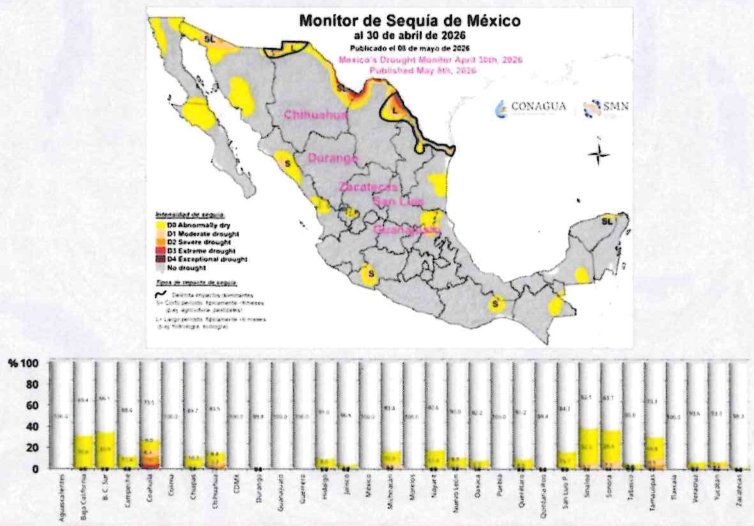
Porcentaje de área con sequía por estado

STATE	Area % until April 30, 2026					
Entidades Federativas	Area % Drought free	D0	D1	D2	D3	D4
Aguascalientes	100.0	0.0	0.0	0.0	0.0	0.0
Baja California	69.4	30.6	0.0	0.0	0.0	0.0
Baja California Sur	66.1	33.9	0.0	0.0	0.0	0.0
Campeche	88.6	11.4	0.0	0.0	0.0	0.0
Coahuila	73.5	9.0	6.3	7.4	3.5	0.3
Colima	100.0	0.0	0.0	0.0	0.0	0.0
Chiapas	89.7	10.3	0.0	0.0	0.0	0.0
Chihuahua	85.5	8.4	3.3	2.1	0.5	0.2
Ciudad de México	100.0	0.0	0.0	0.0	0.0	0.0
Durango	99.8	0.2	0.0	0.0	0.0	0.0
Guanajuato	100.0	0.0	0.0	0.0	0.0	0.0
Guerrero	100.0	0.0	0.0	0.0	0.0	0.0
Hidalgo	91.0	9.0	0.0	0.0	0.0	0.0
Jalisco	96.6	3.4	0.0	0.0	0.0	0.0
México	100.0	0.0	0.0	0.0	0.0	0.0
Michoacán	83.8	10.9	5.3	0.0	0.0	0.0
Morelos	100.0	0.0	0.0	0.0	0.0	0.0
Nayarit	82.6	17.4	0.0	0.0	0.0	0.0
Nuevo León	90.0	8.9	0.9	0.2	0.0	0.0
Oaxaca	92.2	6.2	1.6	0.0	0.0	0.0
Puebla	100.0	0.0	0.0	0.0	0.0	0.0
Querétaro	91.2	8.8	0.0	0.0	0.0	0.0
Quintana Roo	99.4	0.6	0.0	0.0	0.0	0.0
San Luis Potosí	84.3	15.7	0.0	0.0	0.0	0.0
Sinaloa	62.1	32.2	5.7	0.0	0.0	0.0
Sonora	63.7	28.4	7.3	0.6	0.0	0.0
Tabasco	95.6	4.4	0.0	0.0	0.0	0.0
Tamaulipas	70.3	19.8	6.5	3.4	0.0	0.0
Tlaxcala	100.0	0.0	0.0	0.0	0.0	0.0
Veracruz	93.6	6.3	0.1	0.0	0.0	0.0
Yucatán	93.3	3.6	3.1	0.0	0.0	0.0
Zacatecas	98.3	1.7	0.0	0.0	0.0	0.0



2026 año de Margarita Maza

Note: as it can be seen in the report and the picture above, weather conditions until now in the bean states is favorable. We will continue monitoring and reporting in case of any change.

-Mexican Garbanzo Beans 2026 May 8 update

Sinaloa's Garbanzo harvesting has ended, and expected production has been reported to be around 80 thousand MT, a decline from the initial 100 thousand MT, higher than normal temperatures, water stress and plague. It is expected that quality and larger caliber volumes will increase this year. Producers are aiming to get at least MX$20,000 / US$1,100 per MT. In the 2026 CY for Garbanzos, Mexico has exported until March 2026 122,558 MT with an export value of US$166.9 million. Top Mexican garbanzo exports trading partners: Turkey 32.8%; Algeria 18% and Spain 13%; USA 6.4%.

Mexico National Garbanzo-Chickpea Planting-Harvesting-Production FALL-WINTER CROP
HAS/MT Irrigated + Dryland

According to Government FW Cycle	2021	2022	2023	2024	2025	2026 *until March. 2026
Government's Planting Intention - hectares nationwide	88,471	96,349	114,830	86,874	92,771	**174,000
Planted Government - hectares natiowide	87,493	104,978	66,513	122,186	118,207	110,923
Harvested Government - hectares nationwide	87,493	104,978	66,484	121,814	111,016	544
Planted Government - hectares in Sinaloa					90,829	91,663
Harvested Government - hectares in Sinaloa					85,203	15
Own Est. w/local trade associations in Sinaloa:						
Planted hectares in Sinaloa						60,000
Estimated Production - MT in Sinaloa -for exports	165,372	178,423	130,418	260,514	150,000	80,000
Apparent Carry-in MT	132,355	127,203	119,207	91,197	177,313	133,753
Seed, waste and domestic consumption MT	30,000	30,000	30,000	30,000	30,000	30,000
subtotal	267,727	275,626	219,625	313,906	297,313	183,000
Exports- customs *June to May every year MT	140,524	156,419	128,428	136,593	163,560	122,558
Apparent carryover MT	127,203	119,207	91,197	177,313	133,753	60,442
Average Price Paid to Producer per MT	US$800	US$1,050	US$1,050	US$750	US$1,000	US$1,000
Average Export Price per MT	US$1,045	US$1,301	US$1,568	US$1,688	US$1,510	US$1,362

** Green numbers are Est.* / *Blue Numbers are substractions* *Numbers June 2025 until March. 2025
Source: *Prepared by Mercalimentos with SIAP, own and Sinaloa trade estimations and Mexican Customs*
***2026 Planting intention Dec.25, Sinaloa expected to plant 60,000 has in FW2026

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2026 Mexican Fall-Winter MARKETING Season for Beans and Garbanzos

FALL-WINTER: PLANTING RESUMES LATE OCT. FOR BEANS AND NOV. FOR GARBANZOS

Relevance: Second most important cycle for bean production contributing with 25% of the beans for the year, however, varieties in this cycle are mostly yellow beans (70% peruano, mayocoba and azufrado) and 30% black and other speckled varieties. **Only cycle for garbanzo production** in the year. Sinaloa is the most important producer of both beans and garbanzos and Nayarit is the other most important but only produces beans.
Planting: Sinaloa plants 80% to 90% irrigated beans and garbanzos. Nayarit and the other states plant dryland. **Harvesting**: Planting starts October-November for beans, and November-early December for garbanzo. Harvesting for beans is February and garbanzos is March-April.

2026 Fall-Winter Beans – May 8th Update

Sinaloa. Harvesting ended in Sinaloa. Preliminary numbers indicate that production reached around 80 thousand MT of Azufrado and Mayocoba yellow beans. Quality good in general, however some beans were damaged by excess of humidity and insects. Prices remain around MX$24,000 / US1,333 per MT. Agricultural associations in Sinaloa are recommending producers to sell fast and not to high, at MX$20,000 / US$1,100 per MT, because market conditions will not let them go much higher, and there is no need to keep inventories in the state.

MEXICAN GOVERNMENT'S OFFICIAL 2025/2026 FALL- WINTER MEXICO GARBANZO PRODUCTION PLANTING SEASON - Situation until FEBRUARY 28 2026

	Surface - hectares				Production - MT		Yield kilos/has	
State	Government's Planting Intention	Planted hectares according to Government	Harvested according to government	Damaged according to government	Expected by Government	Obtained according to Government	Expected by Government	Obtained according to Government
Baja California Sur	1,500	324	-		3,150	-	2,100	0
Guanajuato	6,028	2,860	529		11,258	825	1,870	1,560
Michoacan	8,929	4,481	-		17,303	-	1,940	0
Sinaloa	**140,116**	91,663	15		**300,272**	27	**2,140**	**1,800**
Sonora	**15,900**	10,143	-		**38,788**	-	**2,440**	**0**
Other states	73,486	1,452	-		2,254	-	2,124	0
TOTAL	**174,212**	**110,923**	**544**		**373,025**	**852**	**2,140**	**1,570**

Source: *Ag. Information agency SIAP *March 2026 report has not been published.*

Agricultural Year Summary - Mexican Bean Crop – Government Numbers

2020-2026 Information obtained from the Agricultural Years' Official Closing including Spring-Summer and Fall-Winter cycles

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

2025 Fall Winter+ Spring-Summer Dec. 30, 2025 Update

Intention	Planted has.	Harvested	Yield kg	Production MT
630,714	635,728	520,184	740	382,895
219,852	204,957	72,739	711	51,668
75,720	71,148	71,748	1,120	75,442
72,625	71,728	65,767	590	39,104
123,256	117,970	108,808	560	60,620
46,230	38,598	35,041	1,270	44,492
90,718	109,753	86,248	1,950	167,863
62,910	64,651	52,993	860	45,786
245,074	230,271	173,477	816	141,638
1,567,099	**1,544,804**	**1,187,005**	**850**	**1,009,508**

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

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MX DRY BEANS HISTORIC - AGRICULTURAL YEAR TWO CYCLES - SEPTEMBER TO AUGUST NEXT YEAR METRIC TONS - GOVERNMENT NUMBERS											
	2020	Variation	2021	Variation	2022	Variation	2023	Variation	2024	Variation	2025 year closing
Carry in est.	335,000	10.18%	369,089	71.58%	633,273	-19.37%	510,582	-45.12%	280,199	122.56%	623,607
Ag.Y Production	1,056,071	10.89%	1,171,108	-17.57%	965,371	-25.04%	723,642	40.21%	1,014,631	-0.50%	1,009,508
Imports	116,392	95.67%	227,742	-70.26%	67,730	150.96%	169,975	168.73%	456,777	-38.27%	281,979
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	9.33%	1,915,094
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	0.00%	1,098,000
Exports	41,734	-14.54%	35,666	62.04%	57,792	-55.01%	26,000	15.38%	30,000	-16.67%	25,000
Carry Over (EST)	368,089	72.04%	633,273	-19.37%	510,582	-45.12%	280,199	122.56%	623,607	23.01%	767,094

Blue numbers are deductions

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

Mexican Market Situation May 10th, update

-The Mexican market is starting to move, requesting quotations, due to several factors including the potential adverse weather with and El Niño climate pattern that may bring drought or extreme humidity in the upcoming planting of the 2026 Spring-Summer cycle. Besides of weather other factors are: the lack of government support to bean producers with seed and fertilizer, and lack of resources to pay for the Guarantee Price, creating a sense of potential need of black beans in case of a short crop. These factors will potentially increase especially black bean imports in the upcoming months.

-At this moment, Mexican producers in the five Mexican bean states followed by USDBC, are starting to plant irrigated beans as part of the 2026 Spring-Summer cycle, that represent only 10%. General planting will start in June-July-August, depending on the weather. The Mexican President has been making promises, offering high quality seed, fertilizer and bags for the upcoming Spring-Summer Cycle, for Zacatecas, Durango and Nayarit beans., -apparently, she's not aware that Nayarit produces beans in the Fall-Winter cycle. In the meantime, bean producers from Zacatecas, Durango and Chihuahua, continue blocking roads and protesting because the promised Price Guarantee, good seed, fertilizer and bags for the 2024 and 2025 Spring Summer cycle, have not been delivered. Sinaloa joined the protest.

- Total bean imports in March 2026 from all origins jumped to 17,248 MT / US$14.31 million, 24% up in volume from the 13,244 MT / US$8.48 million in February. See the imports by bean class in the next page.

-US bean imports in March reached 11,847 MT / US$10.07 million, slightly up from 10,255 MT in February, from which 63% - 7,523 MT were black; 33% - 3,939 MT pintos; and 3% 385 MT were white beans. Market share was back to 69% though, because Canada was able to export more than last month.

- In the September 2025 - March 2026 period of the Commercial Year 2026, total Bean imports from all origins continued mounting, reaching 148,244 MT, with a value of US$124.5 million. U.S. bean imports only in the same period reached 103,675 MT, with a value of US$89.8 million and an accumulated volume market share of 70%.

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COMERCIAL YEAR IMPORTS 2023 - 2026, accumulated imports and volume market share. Prepared by Mercalimentos with Mexican Customs data

IMPORTS	CY 2026 (until March 2026)			CY 2025 Set-Aug			CY 2024 Set-Aug			CY 2023 Set-Aug		
COUNTRY OF ORIGIN	Volume MT	Value USD	Market Share Vol.	Volume MT	Value USD	Market Share Vol.	Volume MT	Value USD	Market Share Vol.	Volume MT	Value USD	Market Share Vol.
USA	**103,675**	**89,778,168**	**70%**	**215,335**	**225,654,291**	**76%**	**331,777**	**403,389,678**	**72%**	**145,773**	**171,509,346**	**84%**
CAN	25,458	20,683,249	15%	30,508	37,739,941	11%	64,845	81,344,071	14%	16,024	18,446,094	9%
ARG	15,686	11,508,261	12%	25,268	27,503,649	9%	32,168	37,512,888	7%	11,751	12,065,956	6%
BRA	3,425	2,560,850	3%	10,729	10,355,403	3%	24,010	28,986,413	5%	0	0	0%
BOLIVIA	0	0	0%	72	93,600	1%	3,533	4,213,185	0.5%	192	205,440	1%
CHINA	0	0	0%	67	156,318	0%	443	499,983	1.5%	0	0	0%
TOTAL	**148,244**	**124,530,528**	**100%**	**281,979**	**301,503,202**	**100%**	**456,776**	**555,946,218**	**100%**	**173,740**	**202,226,836**	**100%**

USDA COMMERCIAL YEAR 2026 - SEPTEMBER 2025/AUGUST 2026
Mexico's Dry Bean Imports-All Origins

Tariff Code	COUNTRY OF ORIGIN	VOLUME IN KILOGRAMS	VOLUME METRIC TONS	USA Vol. Market Share %	COMMERCIAL VALUE $USD
ACCUMULATED TOTAL	**ALL**	**148,243,925**	**148,244**	**70%**	**$124,530,529**
March 2026			**USA Vol. Market Share: 69%**		
Black beans except for planting 0713.33.03	USA	7,523,122	7,523	79%	6,208,092
	CAN	2,169,403	2,169	21%	1,691,027
	ARG	0	-	0%	0
Subtotal		**9,692,525**	**9,692**	**100%**	**7,899,119**
The rest of the beans, except for planting: Pintos, other 0713.33.99	USA	3,938,689	3,939	58%	3,446,863
	CAN	3,050,697	3,050	42%	2,461,699
Subtotal		**6,989,386**	**6,989**	**100%**	**5,908,562**
White beans, except for planting 0713.33.02	USA	384,604	385	67%	419,539
	CAN	181,401	181	33%	203,800
Subtotal		**566,005**	**566**	**100%**	**623,340**
March26 TOTAL		**17,247,916**	**17,248**	**100%**	**14,431,021**
February 2026			**USA Vol. Market Share: 84%**		
Black beans except for planting 0713.33.03	USA	6,292,664	6,293	87%	5,298,881
	CAN	991,212	991	13%	760,111
	ARG	0	-		0
Subtotal		**7,283,876**	**7,284**	100%	**6,058,992**
The rest of the beans, except for planting: Pintos, other 0713.33.99	USA	3,491,916	3,492	65%	3,280,248
	CAN	2,198,512	2,198	35%	1,742,770
Subtotal		**5,690,428**	**5,690**	100%	**5,023,018**
White beans, except for planting 0713.33.02	USA	270,000	270	100%	262,026
	CAN	0		0%	0
Subtotal		**270,000**	**270**	100%	**262,026**
Feb26 TOTAL		**13,244,304**	**13,244**		**11,344,036**
January 2026 66% black; 29% pinto; 5% white	**USA**	**12,405,351**	**12,405**	**76%**	**10,598,346**
January 2026	CAN	3,768,462	3,768	22%	3,130,465
January 2026	ARG	0	-	0%	
January 2026	CHINA	0	0	0%	0
January 2026	BRA	375,000	375	2%	273,350
	Subtotal	**16,548,813**	**16,548**	**100%**	**14,002,161**
December 2025 65% Black; 34% pinto; 1% white	**USA**	**13,795,662**	**13,796**	**65%**	**11,767,463**
December 2025	CAN	4,909,957	4,910	23%	3,258,062
December 2025	ARG	2,060,294	2,060	10%	1,539,720
December 2025	BRA	375,000	375	2%	273,750
	Subtotal	**21,140,913**	**21,141**	**100%**	**16,838,995**
November 2025	**USA**	**19,745,615**	**19,746**	**71%**	**16,789,968**
November 2025	CAN	3,721,875	3,722	13%	3,222,064
November 2025	ARG	2,750,000	2,750	10%	1,997,050
November 2025	BRA	1,625,000	1,625	6%	1,211,250
	Subtotal	**27,842,490**	**27,842**	**100%**	**23,220,332**
October 2025	**USA**	**20,598,500**	**20,598**	**70%**	**18,230,651**
October 2025	ARG	5,702,880	5,703	19%	4,182,153
October 2025	CAN	2,257,983	2,258	8%	2,117,309
October 2025	BRA	750,000	750	3%	573,750
	Subtotal	**29,309,363**	**29,309**	**100%**	**25,103,863**
September 2025	**USA**	**15,225,897**	**15,226**	**66%**	**13,476,091**
September 2025	ARG	5,173,210	5,173	23%	3,789,338
September 2025	CAN	2,211,019	2,211	10%	2,095,942
September 2025	BRA	300,000	300	1%	228,750
	Subtotal	**22,910,126**	**22,910**	**100%**	**19,860,121**

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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 March 2026 vs. February 2026**, were stead in the three main markets. Avg. US black bean prices in March, were around 20% cheaper than **Mexican black beans avg. price was**
- **US Pinto beans prices in March 2026 vs. February 2026**, had a 12% reduction in Monterrey and increased 15% in Guadalajara Average prices remained at MX$22 / US$1.22 per kilo. **Mexican Pintos average price in the three main markets was MX$21.66 / US$1.20 per kilo, around 5% cheaper than US pintos.**
- **U.S. Large and Small Alubias prices in March 2026 vs. February 2026**, large and small alubias registered reductions in Monterrey -4.3% and in Guadalajara -25%, still at prices around US$1.97 per kilo.
- **Peruanos, Mayocoba, Azufrados prices in March 2026 vs. February 2026**, remained steady at high prices from MX$28 to MX$39 - US$1.45 to US$2.10 per kilo.
- **Mexican colored varieties: Bayos, Canario, Cacahuate, Flor de Mayo and Flor de Junio prices, March 2026 vs. February 2026: Flor de Mayo and Flor de Junio** all had price reductions of up to 28%. Average prices were at MX$25 / US$1.51 per kilo.
- **Mexican Small & Large Garbanzos prices March 2026 vs. February 2026,, also had reductions from 3% to 13%**/ large garbanzos continued at avg. prices of MX$27 / US$1.45 per kilo

MONTH: March vs. February 2026 2026
MONTHLY CENTRAL MARKET WHOLESALE AND SEMI-WHOLESALE REPORT

PRODUCT	product origin	MEXICO CITY price ($/KG)		VAR	MONTERREY price ($/KG)		VAR	GUADALAJARA price ($/KG)		VAR
VARIETY	state / country	current 03 30 26	past 02 28 26	%	current 03 30 26	past 02 28 26	%	current 03 30 26	past 02 28 26	%
Imported Black	**Imported**	**22.00**	**22.00**	**0.00%**	**23.00**	**23.00**	0.00%	**24.00**	**27.00**	**-11.11%**
Jamapa Black	Zacatecas							26.00	26.00	0.00%
Nayarit Black	Nayarit	26.00	26.00	0.00%				17.00	18.00	-5.56%
San Luis Black	Zacatecas	23.50	23.50	0.00%				17.00	22.00	-22.73%
Veracruz Black	Veracruz			0.00%						0.00%
Imported Pintos	**Imported**	**22.00**	**22.00**	**0.00%**	**22.00**	**25.00**	**-12.00%**	**22.00**	**19.00**	15.79%
Pinto Saltillo	Zacatecas	21.00	21.00							
Pinto Saltillo	Nayarit							19.00	19.00	0.00%
Pinto Saltillo	Chihuahua	21.00	21.00	0.00%	17.50	19.00	-7.89%	16.00		0.00%
Pinto Saltillo	Durango						0.00%			
Small Alubia	**Imported**	**29.00**	**29.00**	0%	**33.50**	**35.00**	-4.29%	**30.00**	**29.00**	**3.45%**
Large Alubia	**Imported**	**61.00**	**61.00**	**0.00%**	**33.50**	**35.00**	-4.29%	**33.00**	**44.00**	**-25.00%**
Flor de Junio	Zacatecas	26.00	27.00	-4%				24.00	26.00	-7.69%
Flor de Mayo	Zacatecas	23.00	23.00	0.00%				24.00	25.00	-4.00%
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%
Cacahuate Bola	Jalisco	29.50	33.00	-10.61%				33.00	33.00	**0.00%**
Garbancillo Zarco	Jalisco									0.00%
Azufrado	Sinaloa			0.00%				31.00	35.00	-11.43%
Mayocoba	Sinaloa			0.00%				29.00	30.00	
Peruano	Sinaloa	30.00	21.00	42.86%	34.00	32.00	6.25%	29.00	29.00	0.00%
Small Chickpea	**Sinaloa**	**22.00**	**22.00**	**0.00%**	**25.00**	**27.00**	**-7.41%**	**18.00**	**20.00**	**-10.00%**
Large Chickpea	**Sinaloa**	**26.00**	**25.00**	**4.00%**	**25.00**	**27.00**	**-7.41%**	**27.00**	**27.00**	**0.00%**

US DRY BEAN Council

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MONTH: March vs. February 2026 2026
MONTHLY CENTRAL MARKET WHOLESALE AND SEMI-WHOLESALE REPORT

PRODUCT	product origin	SINALOA price ($/KG)		VAR	ZACATECAS price ($/KG)		VAR	CHIHUAHUA price ($/KG)		VAR
VARIETY	state / country	current 03 30 26	past 02 28 26	%	current 03 30 26	past 02 28 26	%	current 03 30 26	past 02 28 26	%
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**							**24.00**	**24.00**	**0.00%**
Pinto Saltillo	Zacatecas				16.50	16.50	0.00%			
Pinto Saltillo	Nayarit									
Pinto Saltillo	Chihuahua						0.00%	19.00	19.00	0.00%
Pinto Saltillo	Durango									
Small Alubia	**Imported**				**33.00**	**33.00**	**0.00%**	**34.00**	**34.00**	**0.00%**
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				20.00	20.00	0.00%	19.00	19.00	0.00%
Garbancillo	Zacatecas						0.00%	26.00	26.00	0.00%
Canario	Sinaloa									
Cacahuate Bola	Jalisco						0.00%			0.00%
Garbancillo Zarco	Jalisco						0.00%			0.00%
Azufrado	Sinaloa	27.00	27.00	0.00%						
Mayocoba	Sinaloa	26.00	26.00	0.00%						
Peruano	Sinaloa	26.00	26.00	0.00%	28.50	33.00	-13.64%			
Small Chickpea	**Sinaloa**				26.00	26.00	0.00%			
Large Chickpea	**Sinaloa**	24.00	24.00	0.00%	30.00	30.00	0.00%	36.00	36.00	0.00%

MONTH: March vs. February 2026 2026
MONTHLY CENTRAL MARKET WHOLESALE AND SEMI-WHOLESALE REPORT

PRODUCT	product origin	NAYARIT price ($/KG)		VAR	YUCATAN price ($/KG)		VAR	DURANGO price ($/KG)		VAR
VARIETY	state / country	current 03 30 26	past 02 28 26	%	current 03 30 26	past 02 28 26	%	current 03 30 26	past 02 28 26	%
Imported Black	**Imported**									
Jamapa Black	Zacatecas									
Nayarit Black	Nayarit	37.00	39.00	-5.13%						
San Luis Black	Zacatecas				26.00	26.00	0.00%	35.00	35.00	
Veracruz Black	Veracruz									
Chiapas Black	Chiapas									
Imported Pintos	**Imported**									
Pinto Saltillo	Zacatecas	n/a	n/a	0.00%	31.00	30.00	3.33%			
Pinto Saltillo	Nayarit	45.00	47.00	-4.26%						
Pinto Saltillo	Chihuahua									
Pinto Saltillo	Durango	36.00	36.00					34.50	32.00	7.81%
Small Alubia	**Imported**				**35.00**	**35.00**	**0.00%**			
Large Alubia	**Imported**	**54.00**	**55.00**	-1.82%						
Flor de Junio	Zacatecas	44.00	45.00	-2.22%						
Flor de Mayo	Zacatecas	45.00	47.00	-4.26%	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	38.00	0.00%	35.00	35.00	0.00%
Garbancillo	Zacatecas	57.00	57.00	0.00%						
Canario	Sinaloa									
Garbancillo Zarco	Jalisco	56.00	56.00							
Azufrado	Sinaloa	54.00	58.00	-6.90%						
Mayocoba	Sinaloa	n/a	n/a	0.00%						
Peruano	Nayarit	37.00	45.00	-17.78%	44.00	44.00		38.00	38.00	0.00%

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Trade Policy Update April 9th:

By the end of April 2026, the main bilateral trade-policy agenda had shifted decisively toward the formal review of the USMCA. Mexico and the United States launched the review process on March 5 and continued technical meetings in April ahead of the July 1 joint review. At the same time, labor enforcement under the agreement remained active, with one case resolved, another resulting in an adverse panel finding, and a new facility review request opened in April. The biotech corn dispute moved into a compliance-monitoring phase after Mexico made ineffective the challenged 2023 measures in 2025, but the issue remains politically sensitive following Mexico's constitutional defense of native corn. Intellectual property became less contentious after USTR moved Mexico from the Priority Watch List to the Watch List in its 2026 Special 301 Report, recognizing regulatory and enforcement progress, although piracy, counterfeiting, pharmaceutical IP, and GI-related concerns remain unresolved. Separate from the USMCA agenda, the U.S. January 29 executive order on countries supplying oil to Cuba added a potential external tariff risk that Mexico will likely continue to monitor closely

Mexican Crude Oil to Cuba. US Retaliation Risk. On January 29, 2026, the U.S. threatened new tariffs on countries supplying oil to Cuba, via an executive order under a national emergency declaration. This materially raised the trade-policy risk around Mexico's energy assistance to Cuba, and Mexican President Claudia Sheinbaum halted crude oil exports to Cuba. However, Sheinbaum's administration, continues to look for ways to continue supplying Cuba, through humanitarian programs.

- **President Claudia Sheinbaum announced that the United States will not impose a new special tariff on Mexico on November 1**, following a brief but strategic phone call with U.S. President Donald Trump

- President Sheinbaum announced in October, **compensatory tariffs of up to 50% to Asian countries, China, South Korea, in December 226% dumping tariff to sugar**, to comply with USMCA and reduce trade deficit.

- **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,

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2026 Mexico Crop and Market Update - March

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.

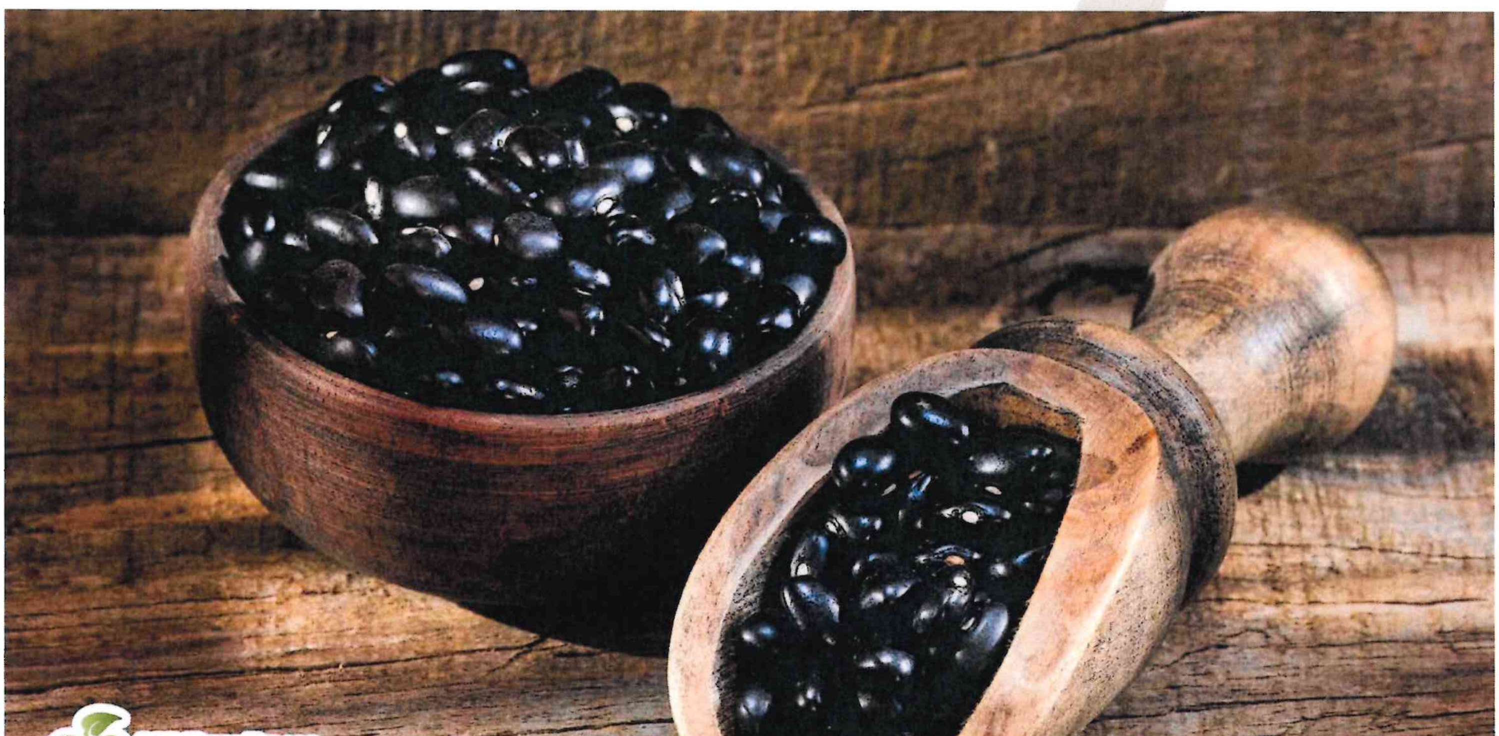
- **Fentanyl Sanctions**. After announcing on July 12th, the implementation of tariffs as part of Fentanyl Sanctions, On July 30th, President Trump paused for 90 days, the 30% Tariffs to Mexican imports that were scheduled to start on August 1st

- **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

- **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.



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Mexico Economic Report April 2026

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

Mexico's Main Economic Indicators	Information Available May 8th, 2026
Population - 2020 NEW CENSUS (INEGI) last update 2021	126.014 million
National GDP Growth Annual (est. 2025)	0.8% revised est. / down from 1.2% in 2024
Average Exchange Rate Avg. March 2026	MX$17.73 / MX$20.09 Apr25
Unemployment Rate March 2026	2.42%
Inflation Rate Y/accu to April 2026 est.	4.45%, up from 3.79% in Jan26
Mexican Crude Oil Price May 8, 2026	US$99.32 up from US$83.64 March26, up from US$57.85 Jan26 per barrell
International Reserves May 8, 2026	US$257 billion
Trade Balance Imports-Exports Y2025 USA-MX	US$872.2billion, up from US$839.9 billion in 2024, both ways

Economy. Mexico entered the second quarter with a weaker base than previously estimated. INEGI's timely estimate showed that GDP contracted 0.8% quarter over quarter in Q1 2026 and grew only 0.2% year over year. The weakness was broad rather than isolated: primary activities fell 1.4%, secondary activities 1.1%, and tertiary activities 0.6% versus the prior quarter. February's IGAE, the monthly proxy for GDP, rose only 0.1% month over month and fell 0.3% year over year, confirming that the loss of momentum persisted through the end of the quarter. **Retail / ANTAD** reported Q1 2026 nominal sales growth of 2.0% at same stores and 4.1% at total stores, with accumulated sales of US$22.6 billion through March. March growth remained positive but moderate, at 1.7% same-stores and 3.8% total stores, suggesting organized retail continued to expand, but at a pace below ANTAD's full-year 2026 projection. **Inflation** remained above target, but it eased after March. INEGI reported annual headline inflation of 4.59% in March and 4.45% in April, while core inflation moved from 4.45% to 4.26% over the same period. On May 7, 2026, Banco de México **cut the policy rate** by 25 basis points to 6.50%, effective May 8. Banxico explicitly stated that Q1 economic activity had contracted, that the peso had appreciated since the previous decision, and that it considered the current move to conclude the easing cycle begun in March 2024. It also kept its expectation that headline inflation should converge to the 3% target in Q2 2027, while warning that risks remain tilted upward because of trade-policy disruptions, geopolitical conflict, cost pressures, peso weakness risk, and climate-related shocks. **Foreign trade** remains one of the economy's clearest supports. INEGI reported that in March 2026 exports reached US$70.727 billion, up 27.7% year over year, while imports reached US$64.795 billion, up 24.3%. For the first quarter of 2026, exports totaled US$175.586 billion and imports US$176.598 billion, leaving a trade deficit of roughly US$1.0 billion. Manufactured goods represented 91.1% of export value in the quarter, which confirms that Mexico's trade performance continues to depend overwhelmingly on manufacturing. Domestic demand and **industrial activity** remained soft. INEGI reported that industrial activity in March 2026 fell 0.6% month over month and 1.5% year over year. Secretariat of Economy reported a record US$40.871 billion in DFI in 2025, up 10.8% from the originally published 2024 figure. More recently, the government launched Plan México's Actions to Facilitate and Provide Certainty for Investment on May 4, underscoring that the federal priority is now to speed up processes and reinforce investment certainty.

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Separately Secretaría de Economía said on April 21 that technical meetings with the United States continued within the T-MEC review process ahead of the formal joint review scheduled for July 1, 2026. In practical terms, the administration is clearly trying to offset weaker domestic momentum with a stronger policy and investment narrative, but the data still point to caution rather than acceleration. **Exchange rate**. The peso has been firmer in early Q2 than it was at the end of Q1. Banxico stated on May 7 that the peso had appreciated since the previous monetary-policy decision, and Banxico's April's MX$17.77 avg. exchange-rate is materially stronger than the 18.0033 level registered on March 31. That improvement helps the inflation outlook at the margin, even if Banxico still sees depreciation risk as one of the upside risks to prices. **Agriculture**. On May 1st, the government named Columba López as the new Secretary of Agriculture, with Julio Berdegué remaining involved in international agricultural matters; Reuters and the Mexican Department of Ag. both framed the move as a cabinet change rather than a sector restructuring, but it is still a meaningful shift in the federal agricultural team. Agriculture/Senasica intensified operations in April to contain livestock screw-worm in the northeast, reported a case in Topilejo, Tlalpan, Mexico City on May 5, and said the sterile-fly plant being built to support eradication was already 75% complete in late April. **Socio-political and security environment**. The operating backdrop is politically noisier and more security-sensitive than in March, even if it is not best described as generalized instability. Political-security environment became more complex after the United States charged Sinaloa Governor Rubén Rocha over alleged cartel ties and sought extraditions against him and others; Reuters reported that President Sheinbaum demanded proof before acting and then had to manage internal political fallout after Rocha stepped aside. Reuters also reported that Mexico warned the United States that unauthorized involvement in a separate anti-drug operation in Chihuahua should not be repeated.

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