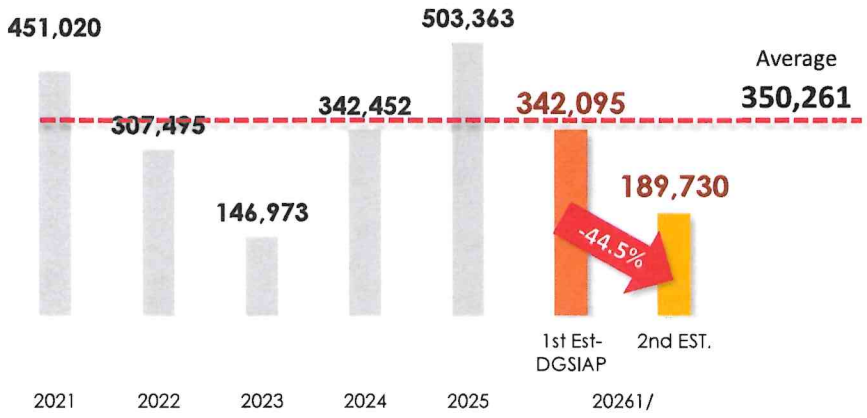
ZACATECAS: DRY BEAN PRODUCTION – RURAL DISTRICTS

2026 Spring-Summer Cycle

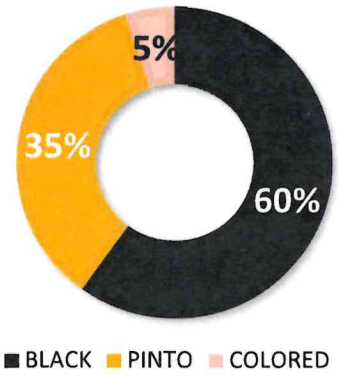
US DRY BEAN Council

ZACATECAS BEAN PRODUCTION, SPRING-SUMMER CYCLE 2021-2026 ESTIMATION MT



DDR	2025		2026[1/]		VARIATION (%)
	DGSIAP	REPORTED	1st EST. DGSIAP	2nd ESTIMATION	EST-2026/ EST. DGSIAP-2026
TOTAL	503,363	282,479	342,095	189,730	-44.5
RÍO GRANDE	253,328	138,452	178,699	111,592	-37.6
ZACATECAS	110,007	45,284	57,876	25,042	-56.7
FRESNILLO	93,118	60,850	68,867	37,372	-45.7
OJOCALIENTE	41,713	33,683	31,084	13,178	-57.6
JEREZ	4,809	3,896	4,875	2,260	-53.6
C. DEL ORO	343	171	598	245	-59.1
JALPA	44	111	95	36	-62.2
TLALTENANGO	0	34	0	4	

PRODUCTION BY BEAN CLASS 2026 SPRING-SUMMER CYCLE



In its initial estimate, SIAP projected the production of 342,095MT, -32% shorter than the 503,363 MT in SS-2025 and -2.3% below the 2021–2025 average of 350,300 MT

Field inspections conducted between September 18 and 25 revealed that rainfall during August and part of September was scarce and poorly distributed. The lack of moisture during the plants' development and blossoming, primarily affected fields planted on time, resulting in poor plant development, low pod formation, and, in some cases, total crop losses. Consequently, **Zacatecas production forecast stands at 189,730 M**, -44.5% shorter than SIAP's estimation, and -45.8% below the five-year average.

1/ Estimación con base en los recorridos de campo e información de la DGSIAP.

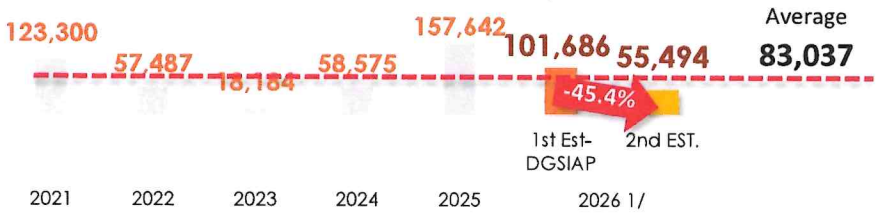
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DURANGO: DRY BEAN PRODUCTION – RURAL DISTRICTS

2026 Spring-Summer Cycle

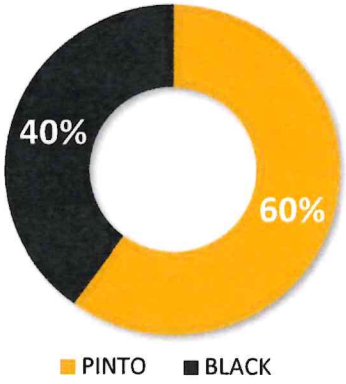
US DRY BEAN Council

DURANGO BEAN PRODUCTION, SPRING-SUMMER CYCLE
2029-2026 ESTIMATION
MT



DDR	2025		2026[1/]		VARIATION (%)
	DGSIAP	REPORTED	1st EST. DGSIAP	2nd ESTIMATION	2nd EST-2026/ 1st EST. DGSIAP-2026
TOTAL	157,642	97,950	101,686	55,494	-45.4
GPE. VICTORIA	81,880	60,943	55,603	35,208	-36.7
DURANGO	65,728	29,468	39,621	17,006	-57.1
LAG.-DURANGO	1,638	753	1,834	120	-93.4
VILLA OCAMPO	3,749	4,251	1,427	1,945	36.3
S. PAPASQUIARO	4,267	2,334	2,829	1,054	-62.7
EL SALTO	380	201	372	161	-56.7

PRODUCTION BY BEAN CLASS
2026 SPRING-SUMMER CYCLE



SIAP's initial production estimate projected 101,686 MT, -35.5% below SS-2025 (157.6 thousand metric tons) and 22.5% above the 2021–2025 average of 83,000.

Field inspections made between September 18 and 20, confirmed that rainfall during the second half of August and first half of September was irregular, resulting in water stress, poor plant development, limited pod formation, and total crop loss in some fields. Consequently, the second production estimate considered that **Durango will produce only 55,494 MT**, -45.4% below DGSIAP's forecast and 33.2% below the average.

1/ Estimation based on field inspections and SIAP information

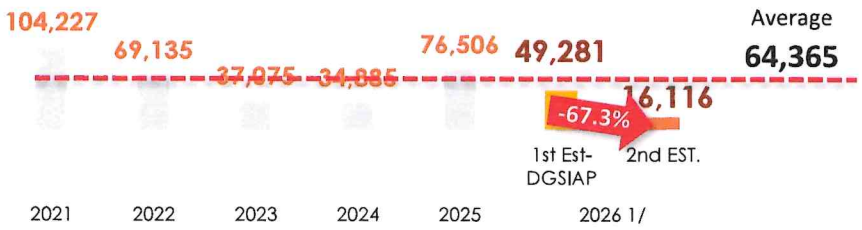
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CHIHUAHUA: DRY BEAN PRODUCTION – RURAL DISTRICTS

2026 Spring-Summer Cycle

US DRY BEAN Council

DURANGO BEAN PRODUCTION, SPRING-SUMMER CYCLE
2020-2026 ESTIMATION
MT



DDR	2025		2026[1/]		VARIATION (%)
	DGSIAP	REPORTED	1st EST. DGSIAP	2nd ESTIMATION	2nd EST-2026/ 1st EST. DGSIAP-2026
TOTAL	76,506	54,714	49,281	16,116	-67.3
CUAUHTÉMOC	31,334	18,250	13,277	4,870	-63.3
MADERA	17,633	16,852	13	7	-46.9
CHIHUAHUA	4,756	2,872	3,441	707	-79.5
PAPIGOCHI	10,736	7,605	16,235	5,762	-64.5
SAN JUANITO	554	1,042	5,079	1,885	-62.9
CASAS GRANDES	4,622	3,285	195	68	-65.2
PARRAL	395	242	469	48	-89.8
OTHERS	6,478	4,565	10,573	2,770	-73.8

PRODUCTION BY BEAN VARIETY
2026 SPRING-SUMMER CYCLE



SIAP's initial production estimate projects the production of 49,300 MT, representing a -35.6% decrease compared with SS-2025 76,506 MT. and 23.4% below the 2021–2025 average of 64,400 MT.

Field inspections conducted on September 12th and 13th, confirmed damage to rainfed dry bean fields due to scarce rainfall during August and September. Drought conditions delayed plant growth and reduced pod formation during the flowering and pod development stages. Consequently, **Chihuahua's production estimate stand at only 16,200 MT**, -67.3% below SIAP's forecast and 75% below average.

1/ Estimation based on field inspections and SIAP information

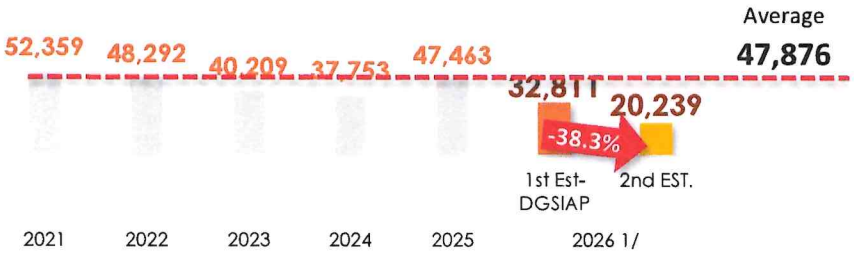
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GUANAJUATO: DRY BEAN PRODUCTION–RURAL DISTRICTS

2026 Spring-Summer Cycle

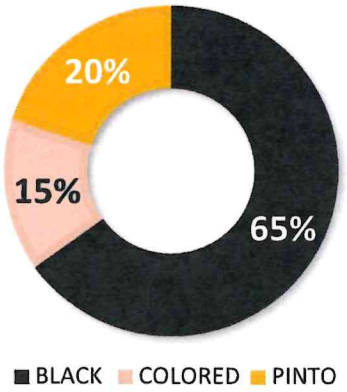
US DRY BEAN Council

GUANAJUATO BEAN PRODUCTION, SPRING-SUMMER CYCLE
2021-2026 ESTIMATION
MT



DDR	2025		2026[1/]		VARIATION (%)
	DGSIAP	REPORTED	1st EST. DGSIAP	2nd ESTIMATION	2nd EST-2026/ 1st EST. DGSIAP-2026
TOTAL	47,463	24,640	32,811	20,239	-38.3
DOLORES HIDALGO	23,518	13,896	13,883	10,441	-24.8
CELAYA	9,247	2,212	4,594	1,540	-66.5
SAN LUIS DE LA PAZ	8,642	5,533	8,206	4,979	-39.3
COTARZAR	4,956	2,230	5,492	2,621	-52.3
LEÓN	1,100	768	636	658	3.4

PRODUCTION BY BEAN VARIETY
2026 SPRING-SUMMER CYCLE



SIAP's initial production estimated 32,,811 MT, representing a -30.9% decrease compared with the 47,463 MT obtained in SS-2025 and -31.5% less than the 2021–2025 average of 47,900 MT.

Field inspections conducted on September 24 confirmed that since August rainfall had been scarce and irregular in some producing areas. Consequently, **Guanajuato's production estimate stands at only 20,239 MT,** -38.3% below SIAP's estimate and -57.7% smaller than the average.

1/ Estimation based on field inspections and SIAP information

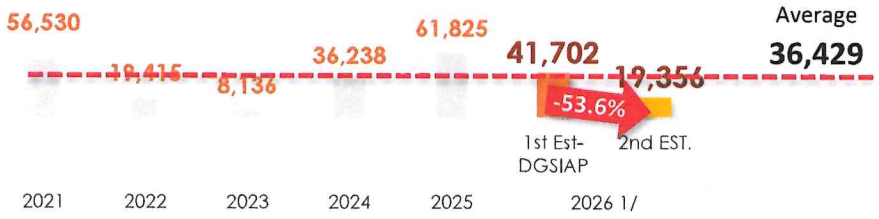
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SAN LUIS POTOSI: DRY BEAN PRODUCTION – RURAL DISTRICTS

2026 Spring-Summer Cycle

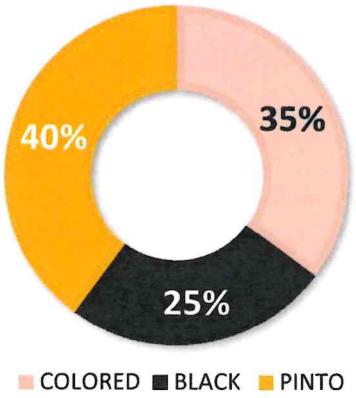
US DRY BEAN Council

SAN LUIS POTOSI BEAN PRODUCTION, SPRING-SUMMER CYCLE
2021-2026 ESTIMATION
MT



DDR	2025		2026[1/]		VARIATION (%)
	DGSIAP	REPORTED	1st EST. DGSIAP	2nd ESTIMATION	2nd EST-2026/ 1st EST. DGSIAP-2026
TOTAL	61,825	28,120	41,702	19,356	-53.6
SALINAS	43,960	20,941	33,416	13,148	-60.7
SAN LUIS POTOSÍ	12,051	3,716	6,731	3,642	-45.9
MATEHUALA	3,765	2,555	1,455	1,916	31.7
RIOVERDE	1,911	870	36	622	1651.0
CIUDAD FERNÁNDEZ	138	39	65	29	-56.1

PRODUCTION BY BEAN VARIETY
2026 SPRING-SUMMER CYCLE



1/ Estimation based on field inspections and SIAP information

SIAP's initial production estimate projects a harvest of 41,702 MT. This represents a -35.2% decrease compared with 61,825 MT obtained in the SS-2025. However, it remains 14.5% above the 2021–2025 average (36.4 thousand metric tons).

Field inspections conducted on September 24 and 25 confirmed that scarce and irregular rainfall negatively affected crop development, delaying plant growth during the flowering stage, reducing pod formation and grain filling, and causing total crop losses in some fields. Consequently, San Luis Potosi's production estimate stands at only 19,356 MT, -53.6% below SIAP's estimate and -46.9% smaller than the average.

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CONCLUSIONS

US DRY BEAN Council

Scarce and irregular rainfall during August and September limited development in several producing areas across the five states analyzed. These conditions **resulted in limited pod formation and total crop losses in some fields, negatively affecting yields and overall production for the Spring-Summer Cycle 2026**

Lower production could suggest an increase in dry bean imports to ensure sufficient supplies to help meet domestic demand. Import volumes will be influenced by several factors, including demand by variety, domestic price levels, prices offered by foreign suppliers, and exchange rate, among others. High retail dry bean prices discourage consumption.

In early August, imported dry bean prices showed an upward trend. This increase was driven by lower production and poor quality of Argentina's black bean harvest, a decline in Brazil's production, particularly a 40% reduction in black bean output, and growing demand in Central America. Furthermore, following the release of Report 1 SS-2026 planting report, which confirmed a reduction in bean planted area, prices began to rise as the market anticipated lower harvest volumes and sought to secure supplies.

Alimentación para el Bienestar (ApB), formerly known as SEGALMEX, has taken advantage of these market conditions to sell its dry bean inventories from previous years. These inventories are estimated at 80 thousand metric tons from the SS-2024 harvest and approximately 200 thousand metric tons from the SS-2025 harvest.

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