

Estimated Dry Bean Production in México Spring-Summer 2026

Zacatecas, Durango, Chihuahua,
Guanajuato, San Luis Potosí

August 2026





REPORT 1: EXECUTIVE SUMMARY

2026 MEXICO BEAN CROP SPRING-SUMMER CYCLE



1. During to the field inspections conducted in the five states included in this assessment, it was found that:

- Of the total fields visited, 12% (14) were irrigated and 88% (107) were rainfed.
- Weather conditions at the beginning of the planting period allowed **64% of the fields to be planted within the dates recommended by INIFAP - National Institute for Forestry, Agriculture and Livestock Research. The remaining 36% were planted late, due to factors such as lack of field access caused by excess water to plant beans during June and part of July, as well as lack of money to start agricultural activity, among others.**
- **99% of the fields visited beans were in the growing stage** and only 1% were blooming.
- **General crop condition** and plant health were excellent in 20% of the fields, good in 64%, regular in 15% and poor in 1%.
- **Soil moisture** was excellent in 11% of the fields verified, good in 63%, regular in 19% and poor in 7%.
- **Cultivation** work was excellent in 50% of the fields, good in 42%, regular in 7% and poor in 6%.

2. The Drought Monitor from the National Meteorological Service (SMN) reported that, as of June 30, 2026, the percentage of areas with severe to exceptional drought (D2 to D4) at the national level was 0.3%, 97.4% lower than in June 2025. In July it was 0.1%, a 66.7% decrease compared with the previous month and 98.7% lower than a year earlier. As of August 15, drought in the national territory reached only 0.1%.





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2026 MEXICO BEAN CROP SPRING-SUMMER CYCLE



3. The presence of weather events such as Tropical Storm Boris brought above-average rainfall to a large part of the country and contributed to the timely start of the rainy season, generating ideal conditions to begin bean planting for SS-2026. Rainfall in June and part of July allowed 64% of plantings to be established on time.

Zacatecas: After the field inspection it was estimated that bean planting in this state reached **358,500 hectares**, -43.2% below the 630,900 hectares projected by SIAP. Around 35% of the area traditionally planted with beans, equivalent to 190 thousand hectares, changed use. Of this area, 35 thousand hectares were planted with oats, 23 thousand with corn, 22 thousand with wheat, 18 thousand with pumpkin, 7 thousand with sorghum and 15 thousand with other crops such as carrots, peppers and alfalfa, while 70 thousand hectares were not planted. This was visible in the municipalities of Cañitas de Felipe Pescador, Rio Grande, Francisco R. Murguía, Miguel Auza, Sombrerete, Juan Aldama, Sain Alto, Pinos, Villa Hidalgo, Villa Gonzalez Ortega, Villa de Cos, Panfilo Natera, Ojocaliente and Trancoso.

Durango: After the field inspection it was estimated that bean planting in this state reached **105,600 hectares**, a -54.5% decrease compared with the 232,300 hectares projected by SIAP. Around 46% of its traditional bean surface, equivalent to 90 thousand hectares, changed use: 18 thousand hectares were planted with oats, 20 thousand with corn, 10 thousand with wheat, 7 thousand with other crops such as peppers, and 35 thousand hectares were not planted. This situation was visible in Santa Clara, Vicente Guerrero, Nombre de Dios, Poanas, Nuevo Ideal, Canatlan, Panuco de Coronado, Guadalupe Victoria and Cuencame.

Chihuahua: After the field inspection it was estimated that bean planting in this state reached **19,400 thousand hectares**, -74.8% below SIAP's projection of 76,800 thousand hectares. Around 56 thousand hectares, representing 74% of the traditional bean surface, were distributed as follows: 20 thousand hectares with oats, 4 thousand with wheat, 10 thousand with corn and 22 thousand hectares left unplanted. This situation was noticeable in Cuauhtemoc, Santa Isabel, Cusiuhiriachi, Riva Palacio and Namiquipa.





REPORT 1: EXECUTIVE SUMMARY

2026 MEXICO BEAN CROP SPRING-SUMMER CYCLE



Guanajuato: After the field inspection it was estimated that bean planting in this state reached 25,100 hectares, 32.6% below the 37,300 hectares estimated by SIAP. It was found that 35 thousand hectares representing 58% of the traditional bean surface were planted with other crops: 7 thousand with oats, 8 thousand with sorghum, 6 thousand with wheat, 3 thousand with corn, 2 thousand with crops such as cabbage and peppers, and 9 thousand remained unplanted. This trend was repeated across all bean producing municipalities.

San Luis Potosi: After the field inspection it was estimated that bean planting in this state 42,300 hectares, a -63.9% decrease compared with the 117,300 thousand hectares estimated by SIAP. Around 78 thousand hectares, representing 65% of the traditional bean surface, followed this behavior: 15 thousand were planted with oats, 14 thousand with corn and 5 thousand with other crops such as alfalfa, while 44 thousand hectares were left unplanted. This situation was noticeable across all bean-producing areas of the state.

Based this information collected during the field inspections, the **planted surface in the five states included in this assessment is estimated at 550,800 hectares.** When added to the 155,200 thousand hectares planted in the rest of the country, **the national bean planted area is estimated at 706,100 hectares.** This represents a -46.1% decline compared with SIAP's projection of 1.3 million hectares, and is -42.9% below the 2019-2025 historical average of 1,23 million hectares in the nation.

It should be mentioned that in the bean states, better moisture conditions could have suggested higher bean plantings. However, in the last three agricultural cycles, due to weather contingencies, mainly drought, and lower financial resources, farmers have opted to establish other crops, such as forage crops, which require less investment and have lower water demand.





REPORT 1: EXECUTIVE SUMMARY

2026 MEXICO BEAN CROP SPRING-SUMMER CYCLE



5. Varieties planted at the national level, it is estimated that

55% or 388,600 has are planted with black beans

33% or 235,300 has are pinto beans

12% or 82,500 has colored beans

Based on the field inspections in the five main producing states, a first crop estimate indicates that Mexico's national dry bean **production for the 2026 Spring-Summer Cycle could reach 422,600 thousand MT**, -50.3% below DGSIAP's projection of 849,700 MT and -40.6% below the 2019-2025 average of 711,700 MT. This number will be adjusted in the next 2 assessments, according to the crop's performance during the cycle.

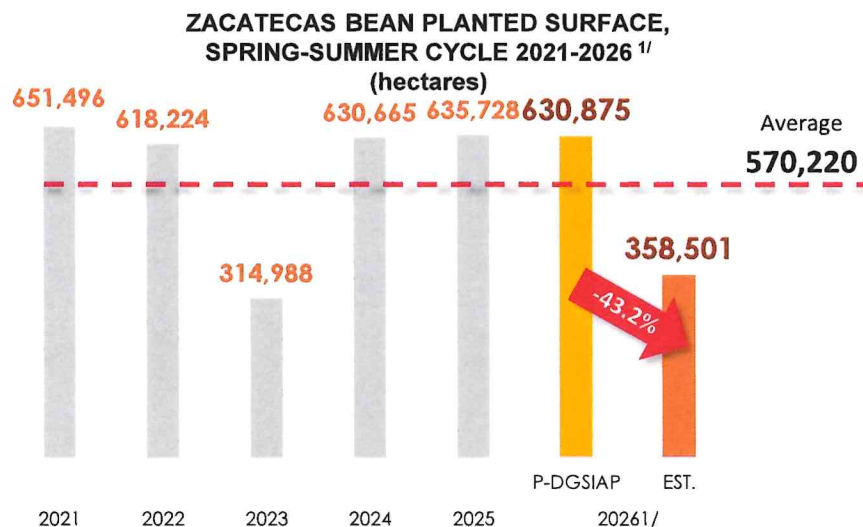
Production and Varieties. At the national level, it is estimated that:

54% black beans, equivalent to 226,400 thousand MT

33% pinto beans, equivalent to 139,400 thousand MT

13% colored beans, equivalent to 56,800 thousand MT.





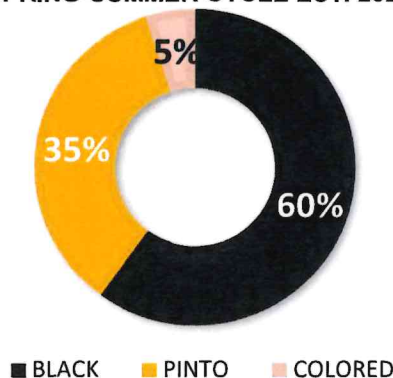
ZACATECAS: DRY BEAN PLANTING – RURAL DISTRICTS 2026 Spring-Summer Cycle



SURFACE PLANTED (has) ZACATECAS

DDR	2025		2026 ^{1/}		VARIATION (%) EST-2026/ PROG. DGSIA-2026
	DGSIA	REPORTED	PROG-DGSIA	ESTIMATION	
TOTAL	635,728	478,098	630,875	358,501	-43.2
RÍO GRANDE	324,659	251,731	322,790	189,140	-41.4
ZACATECAS	114,135	75,473	110,654	55,569	-49.8
FRESNILLO	100,587	79,026	100,445	59,795	-40.5
OJOCALIENTE	89,701	67,365	89,701	50,397	-43.8
JEREZ	5,340	3,975	4,940	2,511	-49.2
C. DEL ORO	1,258	381	2,235	1,041	-53.4
JALPA	49	69	95	41	-56.7
TLALTENANGO	0	78	15	6	-59.9

ZACATECAS BEAN PLANTED SURFACE BY VARIETY, SPRING-SUMMER CYCLE EST. 2026 ^{1/}



For the current cycle, SIAP projected a planted surface of 630,900 hectares, a volume similar to SS-2025 and 10.6% above the 2021-2025 average of 570,200 hectares.

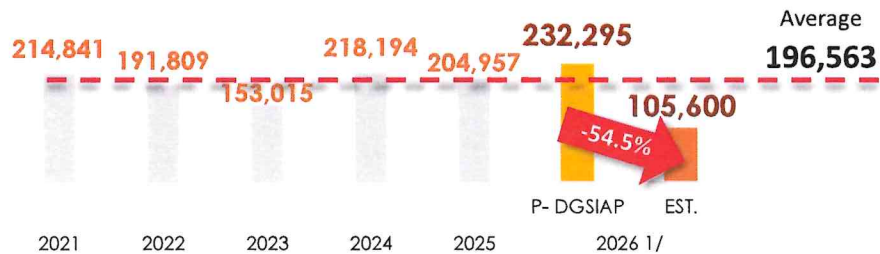
However, despite better moisture conditions, the field inspections conducted between August 8th and 12th revealed that planted surface reached only 358,500 hectares. This represents a -43.2% decline compared with the government's projection, and -37.1% decline compared with the 5-Y average.

^{1/} Estimation based on field inspections and SIAP information.

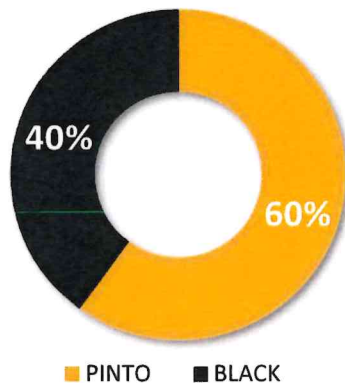
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**DURANGO BEAN PLANTED SURFACE,
SPRING-SUMMER CYCLE 2021-2026 ^{1/}**
(hectares)



**DURANGO BEAN PLANTED SURFACE BY VARIETY,
SPRING-SUMMER CYCLE EST. 2026 ^{1/}**



^{1/} Estimation based on field inspections and SIAP information.

DURANGO: DRY BEAN PLANTING – RURAL DISTRICTS 2026 Spring-Summer Cycle



SURFACE PLANTED (has) DURANGO

DDR	2025		2026 ^{1/}		VARIATION (%) EST-2026/ PROG. DGSIAPI-2026
	DGSIAPI	REPORTED	PROG-DGSIAPI	ESTIMATION	
TOTAL	204,957	112,420	232,295	105,600	-54.5
GPE. VICTORIA	106,291	67,714	127,106	66,180	-47.9
DURANGO	81,859	37,302	81,831	33,145	-59.5
LAG.-DURANGO	5,138	909	7,219	504	-93.0
VILLA OCAMPO	6,107	4,251	11,625	3,777	-67.5
S. PAPASQUIARO	4,989	1,945	3,934	1,728	-56.1
EL SALTO	573	300	580	266	-54.1

In Durango, SIAP calculated plantings at 232,300 hectares, 13.3% above SS-2025 and 18.2% above the 2021-2025 average of 196,600 hectares.

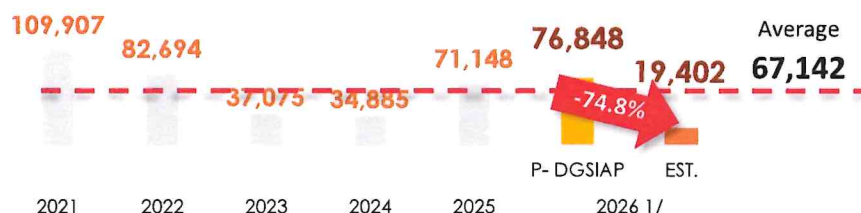
After the field inspections made on August 8th and August 16th, bean planted surface was estimated at 105,600 hectares, -54.5% below the SIAP program and -46.3% below the 5Y average.



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CHIHUAHUA: DRY BEAN PLANTING – RURAL DISTRICTS 2026 Spring-Summer Cycle

CHIHUAHUA BEAN PLANTED SURFACE,
SPRING-SUMMER CYCLE 2021-2026 ^{1/}
(hectares)



CHIHUAHUA BEAN PLANTED SURFACE BY VARIETY,
SPRING-SUMMER CYCLE EST. 2026 ^{1/}



^{1/} Estimation based on field inspections and SIAP information.

SURFACE PLANTED (has) CHIHUAHUA

DDR	2025		2026 ^{1/}		VARIATION (%) EST-2026/ PROG. DGSIAPI-2026
	DGSIAPI	REPORTED	PROG-DGSIAPI	ESTIMATION	
TOTAL	71,148	49,138	76,848	19,402	-74.8
CUAUHTÉMOC	25,440	16,591	24,637	6,634	-73.1
MADERA	23,710	16,852	12	5	-58.6
CHIHUAHUA	3,424	2,872	3,270	447	-86.3
PAPIGOCHI	9,290	6,285	25,305	6,739	-73.4
SAN JUANITO	1,582	1,371	10,020	2,513	-74.9
CASAS GRANDES	3,592	2,119	406	97	-76.1
PARRAL	435	269	500	36	-92.8
OTHERS	3,675	2,778	12,698	2,930	-76.9

For the 2026 Spring-Summer cycle, SIAP projected the bean planting at 76,800 hectares, an 8.0% increase compared with SS-2025 and 14.5% above the 2021-2025 average of 67,100 hectares.

After the field inspections carried out from July 30th to August 1st, the bean planted surface was estimated at 19,400 hectares. This figure represents a -74.8% decrease compared with SIAP's program and is -71.1% below the 5Y average.



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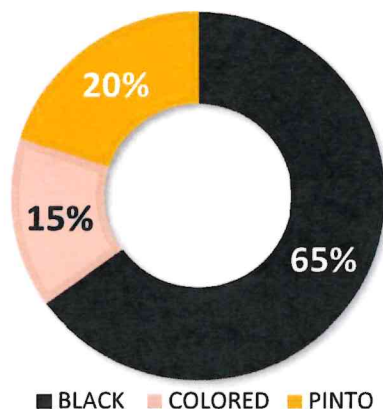
GUANAJUATO: DRY BEAN PLANTING – RURAL DISTRICTS 2026 Spring-Summer Cycle



GUANAJUATO BEAN PLANTED SURFACE,
SPRING-SUMMER CYCLE 2021-2026 ^{1/}
(hectares)



GUANAJUATO BEAN PLANTED SURFACE BY VARIETY,
SPRING-SUMMER CYCLE EST. 2026 ^{1/}



^{1/} Estimation based on field inspections and SIAP information.

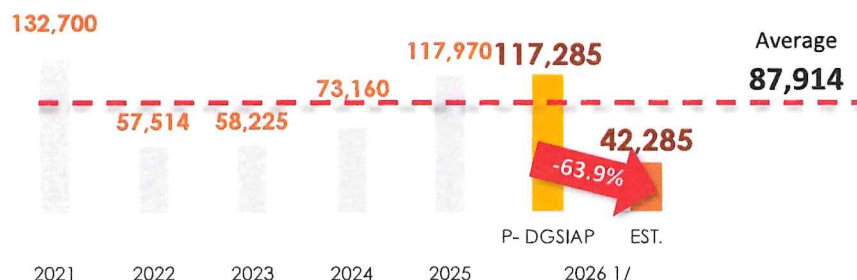
SURFACE PLANTED (has) GUANAJUATO

DDR	2025		2026 ^{1/}		VARIATION (%) EST-2026/ PROG. DGSIA-2026
	DGSIA	REPORTED	PROG-DGSIA	ESTIMATION	
TOTAL	38,598	27,186	37,186	25,050	-32.6
DOLORES HIDALGO	21,885	17,568	22,550	16,656	-26.1
CELAYA	4,319	2,212	4,374	1,556	-64.4
SAN LUIS DE LA PAZ	7,872	5,030	7,742	4,715	-39.1
COTARZAR	3,368	1,716	1,995	1,551	-22.3
LEÓN	1,155	660	525	572	8.9

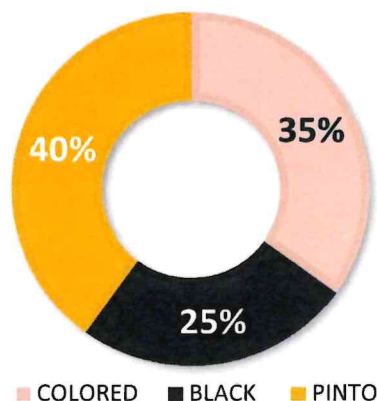
SIAP estimated for Guanajuato, a bean planted surface of 37,200 thousand hectares, which represents a -3.7% decrease compared with the 38,600 hectares planted in SS-2025, and a -32.3% decline compared with the 2021-2025 average of 54,900 thousand hectares.

After the field inspections conducted on August 7th and 8th, it was determined that the bean planted surface was of 25,100 hectares. This is -32.6% shorter than SIAP's estimate, and -54.4% below the 5Y average.

**SAN LUIS POTOSI BEAN PLANTED SURFACE,
SPRING-SUMMER CYCLE 2021-2026 ^{1/}**
(hectares)



**SAN LUIS POTOSI BEAN PLANTED SURFACE BY VARIETY,
SPRING-SUMMER CYCLE EST. 2026 ^{1/}**



SAN LUIS POTOSI: DRY BEAN PLANTING – RURAL DISTRICTS 2026 Spring-Summer Cycle



SURFACE PLANTED (has) San Luis Potosí

DDR	2025		2026 ^{1/}		VARIATION (%) EST-2026/ PROG. DGSIAPI-2026
	DGSIAPI	REPORTED	PROG-DGSIAPI	ESTIMATION	
TOTAL	117,970	48,724	117,285	42,285	-63.9
SALINAS	83,540	36,104	86,908	31,454	-63.8
SAN LUIS POTOSÍ	21,796	5,993	14,426	5,017	-65.2
MATEHUALA	10,482	5,555	13,370	4,912	-63.3
RIOVERDE	2,050	1,023	2,463	863	-64.9
CIUDAD FERNÁNDEZ	103	49	117	39	-66.4

SIAP projected bean planting in 117,300 hectares in San Luis Potosi, similar to the 117,900 hectares planted in SS-2025 and 33.4% above the 2021-2025 average of 87,900 thousand hectares.

During the field inspections carried out on August 8th and 12th, it was confirmed that the surface established with beans is 42,300 hectares. This represents a -63.9% decrease compared with SIAP's estimate and -51.9% below the historical average.

^{1/} Estimation based on field inspections and SIAP information.

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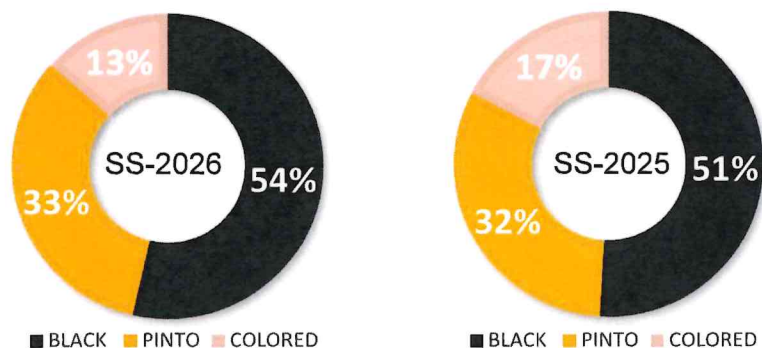




**NATIONAL BEAN PRODUCTION,
SPRING-SUMMER 2019 - 2026 ^{1/}**
(thousand MT)



**NATIONAL BEAN PRODUCTION BY VARIETY,
SPRING-SUMMER CYCLE 2025 vs 2026 ^{1/}**



Source: Own estimation based on field inspections and SIAP information.

^{1/} DGSIAP programmed production for SS-2026 and preliminary SS-2026 production estimate (August 2026).

MEXICO'S NATIONAL BEAN PRODUCTION

2019-2026 Spring-Summer Cycle



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For the Spring-Summer Cycle 2026, SIAP projected the production of 850 thousand MT, -14.6% less than the 995 thousand MT obtained in SS-2025, but 19.4% above the 2019-2025 average of 712 thousand MT.

After the field inspections of this assessment it was determined that the **bean planted surface can be estimated at 706 thousand hectares**, estimating a **national bean production close to 423 thousand MT, -50.3% shorter than SIAP's projection**, and **-40.6% less than the 2019-2025 average**. This number will be adjusted in the next two assessment reports..

It is expected that **54% of the beans equivalent to 226,400 MT will be black beans, -29.6% shorter than the 321,600 MT obtained in SS-2025**. Pinto bean production is estimated at 139,400 MT, representing 33% of the total, -30.8% shorter than the 201,400 MT obtained last year. Colored bean production is expected at 56,800 MT, representing 13% of the total, -47.8% shorter than the 108,800 MT obtained in 2025.

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PRODUCTION BY STATE AND VARIETY (metric tons)

STATE/VARIETY	BLACK	PINTO	COLORED	TOTAL
TOTAL	321,505	201,373	108,823	631,700
PV-2025 (Reported 2025)				
CHIHUAHUA		54,714		54,714
DURANGO	34,282	63,667		97,950
GUANAJUATO	17,248	2,464	4,928	24,640
SAN LUIS POTOSÍ	9,842	4,218	14,060	28,120
ZACATECAS	169,488	70,620	42,372	282,479
OTHERS	90,645	5,690	47,463	143,798
PV-2026 (Est. August 2026) ^{1/}				
TOTAL	226,433	139,361	56,822	422,616
CHIHUAHUA		18,090		18,090
DURANGO	23,191	34,787		57,978
GUANAJUATO	13,467	4,144	3,108	20,718
SAN LUIS POTOSÍ	5,535	8,856	7,749	22,141
ZACATECAS	118,617	69,193	9,885	197,695
OTHERS	65,622	4,291	36,080	105,993
VARIATION (%)				
2026/2025	-29.6	-30.8	-47.8	-33.1

Source: Own estimation based on field inspections and SIAP information.

^{1/} SIAP programmed production for SS-2026 and preliminary SS-2026 production estimate (August 2026).

NATIONAL PRODUCTION BY STATE AND VARIETY 2026 Spring-Summer Cycle



According to production projections, Zacatecas is expected to contribute 46.8% of the cycle's crop, followed by Durango with 13.7%, San Luis Potosi with 5.2%, Guanajuato with 4.9% and Chihuahua with 4.3%. The rest of the states will contribute 25.1%.

It is estimated that 62.6% of black bean production will be obtained in Zacatecas and Durango; 87.6% of the pinto crop will be generated in Zacatecas, Durango and Chihuahua. Finally, Zacatecas, San Luis Potosi and Guanajuato will contribute 36.5% of colored bean production.



CONCLUSIONS



1. **64% of the fields inspected for this assessment in the five bean states, corresponding to 552,500 thousand hectares, were planted within the dates recommended by INIFAP**, helped by the favorable weather conditions. This represents an increase of 3.2% compared with SS-2025. General crop condition and plant health were excellent in 28%, good in 67% and regular in 5%. On the other hand, the condition and plant health of the beans planted late, equivalent to 576 hectares (46% of the fields), were excellent in 5%, good in 63%, regular in 30% and poor in 2%.

2. In the last four agricultural cycles, **factors such as drought, low prices and lack of money**, among others, have **pushed producers to switch to other crops such as forages**, which require less investment and less water to produce. This has led to a reduction in bean planted surface. **In this cycle, traditional bean surface associated with other crops or left unplanted increased +67.5%, passing from 268 thousand hectares in SS-2025 to 449 thousand in SS-2026**. The 178.6% increase in other crops stands out, rising from 42 thousand to 117 thousand hectares over the same period.

TRADITIONAL BEAN AREAS PLANTED WITH OTHER CROPS SS-2026

STATE	FORAGE	OTHER CROPS	NOT PLANTED	TOTAL
Zacatecas	64	56	70	190
Durango	28	27	35	90
Chihuahua	24	10	22	56
Guanajuato	21	5	9	35
San Luis Potosí	15	19	44	78
Total PV-2026	152	117	180	449
Total PV-2025	98	42	128	268



CONCLUSIONS



3. Bean planted surface is estimated at 706 thousand hectares, and an estimated production of 422 thousand MT. This figure may change depending on weather behavior and the progress of the cycle. Expected production by variety:

226,400 thousand MT Black beans
139,400 thousand MT Pinto beans
56,800 thousand MT of colored beans

4. Lower production is pushing prices upward, which are already showing an increase, especially for pinto beans, the most demanded variety. For this reason, **Pinto bean imports are likely to increase, as national production will not be enough to cover domestic demand, estimated at more than 300 thousand MT per year.**

5. On the other hand, the **participation of the Federal Government, through Alimentacion para el Bienestar (ApB) - formerly Segalmex - plays a key role in the Mexican bean crop trading through the Price Guarantee Program.** In the 2024 and 2025 Spring-Summer cycles, this agency purchased up to 15 MT per producer at a price of MX\$27,000 / US\$1,588 per MT, with an estimated accumulated volume of more than 200,000 MT. While this program has benefited some producers within the program, it also generated market disruption. The price guarantee in SS-2024 and SS-2025 was not recognized by the market, affecting bean sales outside the government program. **This year, ApB auctioned 80 thousand MT of SS-2024 inventory at a price of MX\$8,000 / US\$470.59 per MT. This represented a subsidy of MX\$19,000 / US\$1,117 per MT, driving market prices to a decline affecting mainly the producers' payments.**

For Spring-Summer-2026, **ApB** will implement the bean purchasing program in the main producing states; however, the **2026 Price Guarantee and the volume to be purchased are still unknown.**

