

Voluntary Report – Voluntary - Public Distribution

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Report Highlights:

Mexico's marketing year 2024/25 bean production is 41 percent higher than the record low of the previous year based on increased planted area. However, challenges persist such as adverse weather, limited access to quality seeds, and security issues in key production areas. The government's initiative to establish a seed producing company offers potential solutions, but the timeline for its implementation is unclear. Meanwhile, per capita bean consumption in Mexico continues to decline, reaching 7.7 kilograms per year in 2024.

Summary

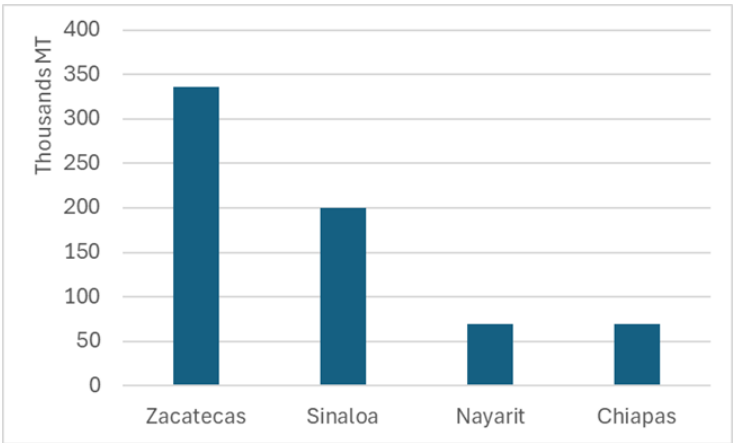
Mexico's bean production in marketing year (MY) 2024/25 (April – March) is estimated at 41 percent higher than the record low production in the previous MY due to a 32 percent increase in planted area. However, challenges persist, such as drought conditions, limited access to quality seeds, and security issues in key production areas. The bean harvested area has decreased by 20 percent over the last decade, falling from 1.68 million hectares (Ha) to 1.36 million Ha this year due to drought conditions, farmers reliance on saved seeds, and security issues in the main cultivation areas. A Government of Mexico (GOM) initiative to establish a seed-producing company may offer potential solutions, although the timeline for implementation is unclear. Meanwhile, per capita bean consumption in Mexico continues to decline, declining to 7.7 kilograms (kg) per year in 2024 compared to 9 kg in 2021. Falling bean consumption reflects shifting consumer preferences towards either animal protein or more affordable plant-based legumes and grains such as lentils, rice, and pasta.

Background

Beans are a staple crop in Mexico, cultivated across diverse regions. The bean sector includes more than 570,000 producers, generating over 382,000 jobs and an annual production value of nearly 17 billion pesos (USD \$850 million). Of the total number of producers, about 20 percent (110,000) are considered commercial producers, contributing roughly 80 percent of production.

Two states are responsible for more than 50 percent of national bean production (Figure 1). Production systems vary significantly across regions. In the central and northern regions, like Sinaloa, Nayarit, Durango and Zacatecas, mechanized farming is more prevalent, leading to lower labor costs and increased efficiency. In contrast, production systems in states like Aguascalientes and San Luis Potosí are more labor-intensive and less mechanized, resulting in lower yields and profitability. Meanwhile in the southeast of the country, like Chiapas there is little use of technology and low yields, but the area planted is considerable.

Figure 1. Main Producer States in MY2024/25



Source: Food and Fishery Information Service (SIAP)

The main harvest periods are February-March and November-December. In 2022, about 84 percent of the total domestic bean harvest was sold commercially, with the remainder used for self-consumption. Of the marketed share of production, 57.2 percent was purchased by traders, 16.3 percent went to the Mexican food security agency SEGALMEX, and 10 percent was sold directly to consumers.

Beans, deeply rooted in Mexican culture and cuisine, are an integral part of the milpa system – a traditional polyculture involving corn, beans, squash, and other crops. The bean sector, however, faces several challenges, including difficulty developing and adopting new technologies due to a diversity of production systems within the sector, the need for improved seed technology, and limited market access. This limited access stems from inadequate road infrastructure and the significant distances between production and consumption centers.

Production

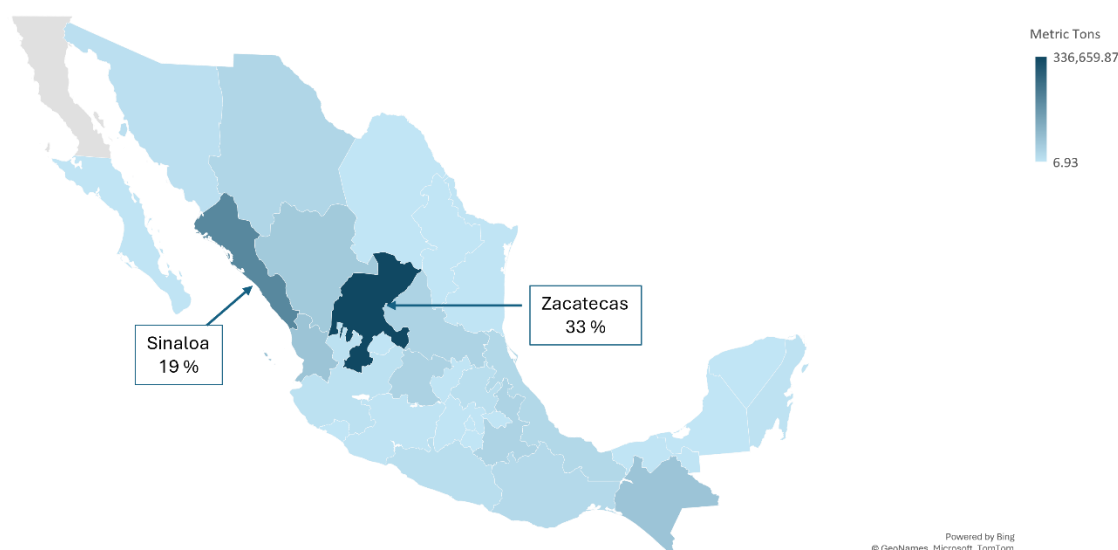
Bean production is estimated at 1.01 million metric tons (MT) in MY 2024/25, a 41 percent increase over the previous MY due to a 32 percent increase in planted area. Record low production in MY 2023/24 is due to falling harvested area, which has dropped over the last decade. Reduced production and harvested area are attributed to drought conditions leading smaller, less intensive producers to abandon crops, generating a significant gap between planted and harvested areas (Figures 3 and 4), lack of certified seed, and additionally, the main cultivation areas facing security issues that affect access to labor and transport of the harvest.

Zacatecas was the leading bean producer in Mexico in MY 2024/25, contributing 33 percent of total production but with a 0.55 MT/Ha yield. Sinaloa was number two with 19 percent of production with a yield of 2.28 MT/Ha. Over the past decade, the harvested area for bean cultivation has declined by 20 percent, from 1.68 million Ha in MY 2014/15 to 1.36 million Ha in MY 2024/25 (Figure 2). All states have lost harvested area except five states: Zacatecas, Nayarit, Quintana Roo, Guerrero and Tamaulipas. Durango and Chihuahua have lost the most area, dropping 53 percent (117,635 Ha) and 39 percent (76,156 Ha), respectively.

Production challenges include limited access to improved seeds. The Mexican seed catalog currently lists¹ 44 bean varieties with breeder titles, but only one is officially registered as "improved." Data on the utilization and impact of these varieties in actual production is limited; other limitations are the inadequate irrigation infrastructure, and adverse weather conditions. Furthermore, inefficient handling and storage practices contribute to significant post-harvest losses, while security issues impact labor access and crop shipments.

¹ <https://www.gob.mx/snics/articulos/catalogo-nacional-de-variedades-vegetales-en-linea?idiom=es>

Figure 2. MY 2024/25 Mexico Bean Production



Data source: Agricultural and Fisheries Information Service (SIAP)²

Bean production in Mexico exhibits seasonal variations. From April to May, the spring-summer cycle accounts for 82 percent of the total area sown (1.1 million Ha). The fall-winter cycle, sown from October to November, covers a smaller area (249,951 Ha). While accounting for just 18 percent of harvested area, irrigated areas contribute significantly to production, with an average yield of 1.96 MT/Ha, compared to 0.55 MT/Ha for rainfed regions (Table 1).

Table 1. MY 2024/25 Estimated Production and Harvested Area by Irrigation System and Sowing Period

	Fall (Ha)	Spring (Ha)	Total (Ha)	Fall (MT)	Spring (MT)	Total (MT)	Yield (MT/Ha)
Irrigated	121,685	64,991	186,676	248,037	117,883	365,920	1.96
Rainfed	128,266	1,049,442	1,177,708	109,199	539,511	648,710	0.55
Total	249,951	1,114,433	1,364,384	357,236	657,394	1,014,630	
Yield (MT/Ha)				1.43	0.59		

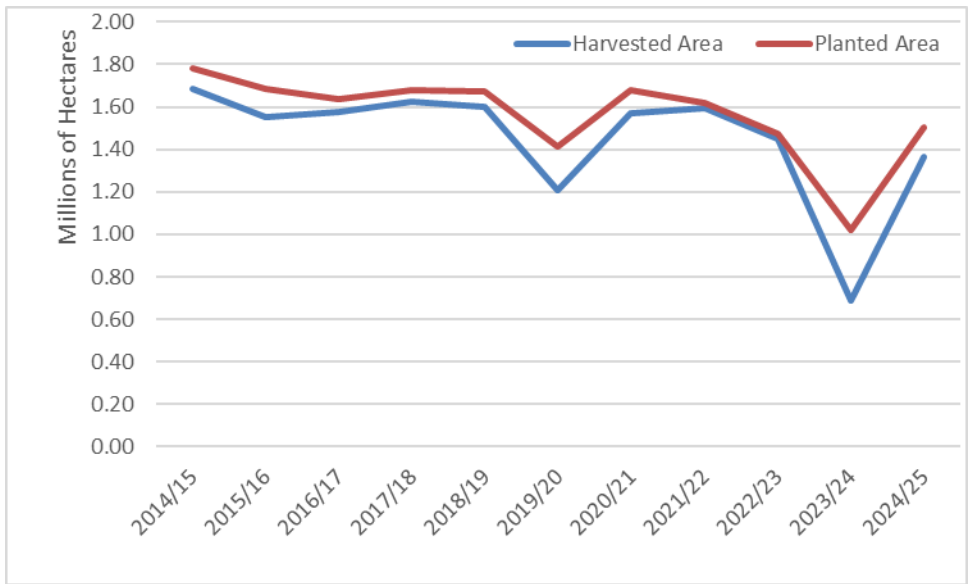
Source: Food and Fishery Information Service (SIAP)

Drought remains a major challenge for bean production in Mexico (Figure 4). The severe drought in MY 2023/24 resulted in a significant decline in harvested acreage. This, coupled with the reliance of 85 percent of planted area (866,787 of 1,018,769 Ha) on seasonal rainfall, makes bean production highly vulnerable to weather fluctuations. Consequently, Mexico's bean production in MY 2023/2024 was a

² <https://www.gob.mx/siap/acciones-y-programas/produccion-agricola-33119>

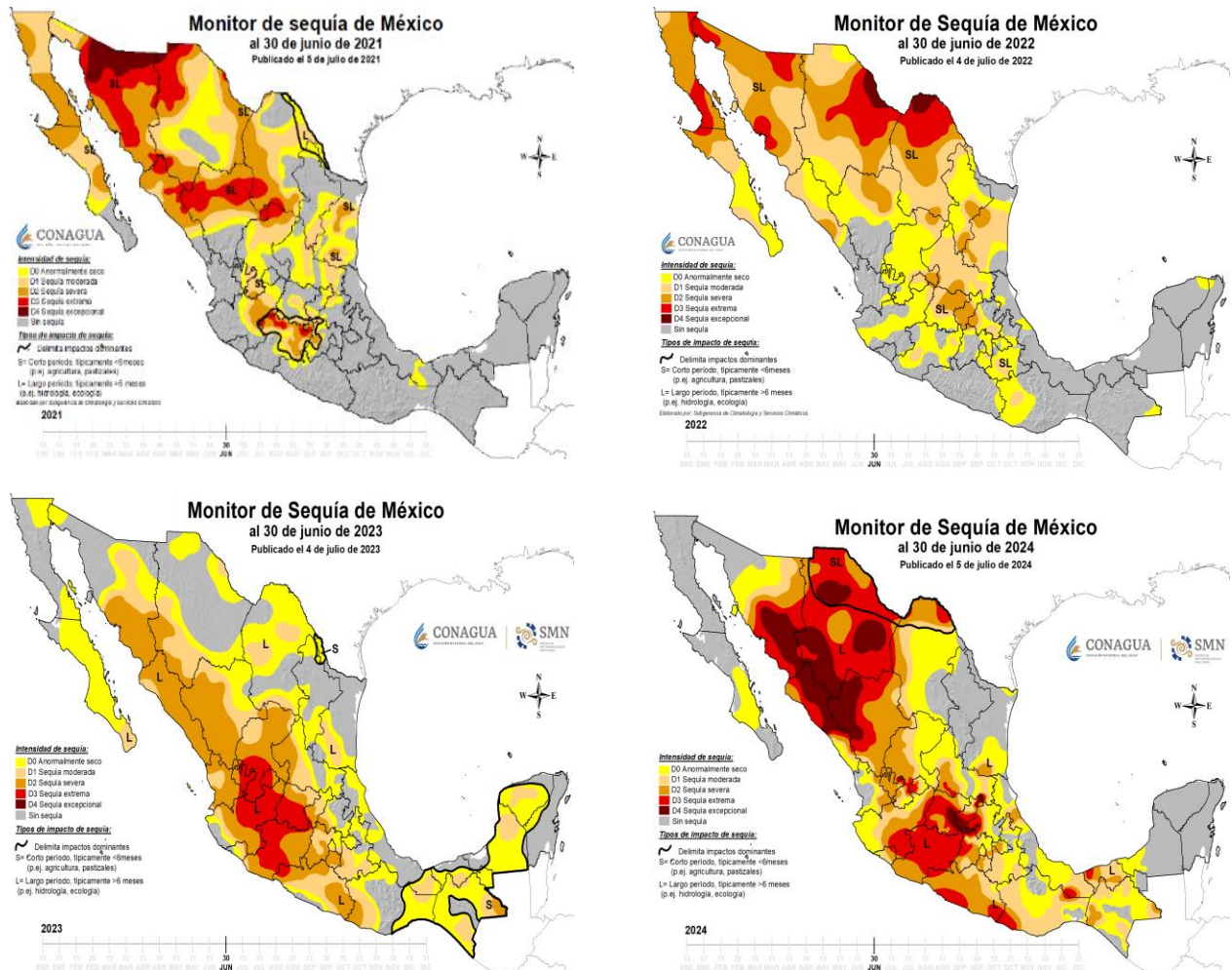
record low 603,357 MT, representing a 38 percent decline from the previous year's production of 968,498 MT. This sharp decrease has led to record-high imports to meet domestic demand and significantly reduced exports.

Figure 3. Bean Planted and Harvested Area (MY2014/15 - MY2025/25)



Data source: SIAP

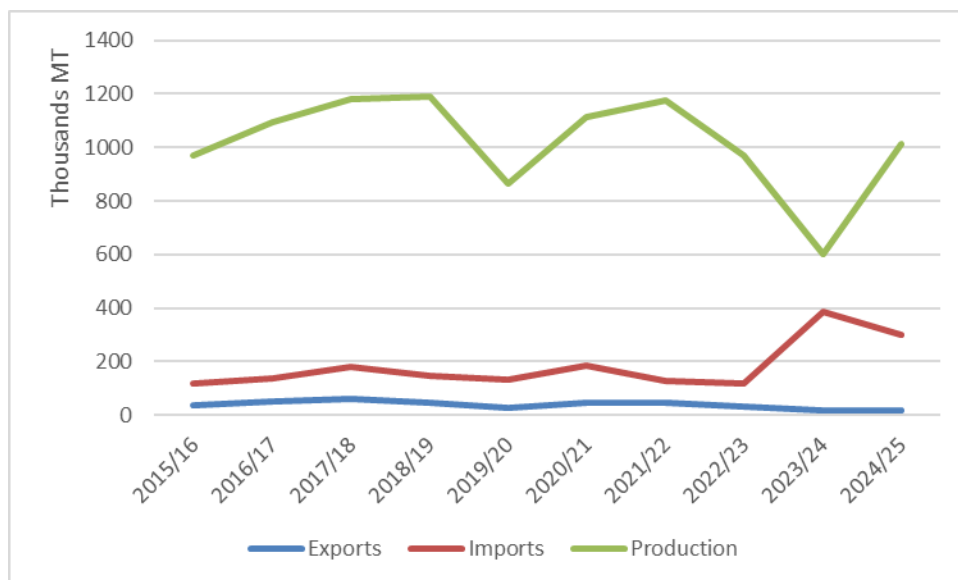
Figure 4. Evolution of the Drought (June 2021-June 2024)



Source: National Water Commission (CONAGUA)

Trade

Fig. 5. Bean Production and Trade During the Last Decade



Source: [SIAP](#) and Trade Data Monitor, LLC

Imports

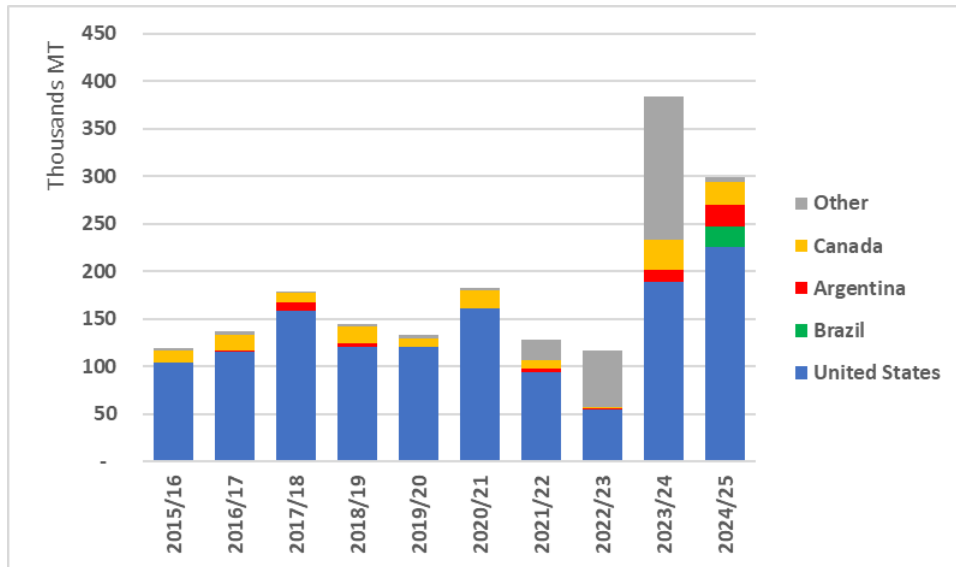
Bean imports (HS codes 071331-071335, 071339, and 071350) in MY 2024/25 are estimated at 299,593 MT, representing a 21 percent decrease compared to the 383,556 MT imported the previous marketing year. This significant decrease is mainly attributed to the increase in domestic production.

The United States remains Mexico's leading supplier of beans, accounting for approximately 75 percent of total imports in MY2024/25. Growing demand for U.S. beans, due to consumer perceptions about the product's healthy attributes and shorter cooking times, has further fueled import growth.

The Presidential Anti-Inflation Decree ([PACIC](#)) program, which temporarily eliminated import tariffs on beans from non-free trade agreement partners, has facilitated the entry of new suppliers, such as Brazil, which now accounts for approximately 7 percent of Mexican bean imports (Figure 6).

While domestic beans are primarily transported by truck – with relatively higher costs due to infrastructure constraints and large distances between production and consumption areas – imports are generally shipped via more cost-effective and secure rail transportation. On the other hand, in recent years the Mexican railroad Ferromex has imposed several embargoes on U.S. agricultural products, including beans. These embargoes appear to be primarily due to capacity issues and congestion on the rail network, which led to significant delays in grain shipments. The situation was exacerbated by increased demand and insufficient investments in rail infrastructure.

Figure 6. Mexican Bean Imports During the Last Decade

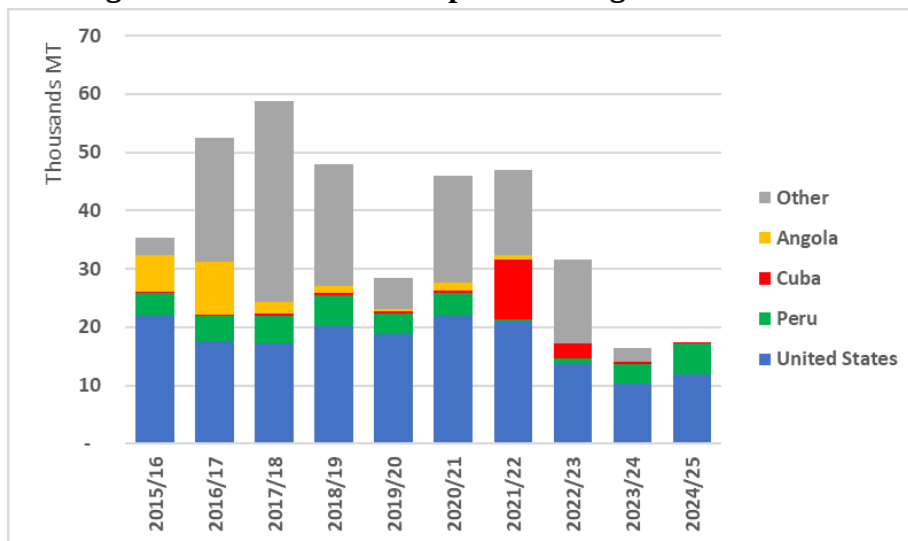


Source Trade Data Monitor, LLC

Exports

Except for 2014 and 2017, Mexico's bean exports have remained below 50,000 MT. For MY 2024/25, exports are estimated at 17,305 MT, primarily to the United States, Peru, and Cuba (Figure 7). This and previous MY represents the lowest export volume in the last decade, mainly attributed to limited domestic production. Mexico is the fourth largest bean exporter to the United States, accounting for 6.7 percent of total U.S. bean imports in 2023, valued at USD 19.3 million.

Figure 7. Mexican Bean Exports During the Last Decade



Source Trade Data Monitor, LLC

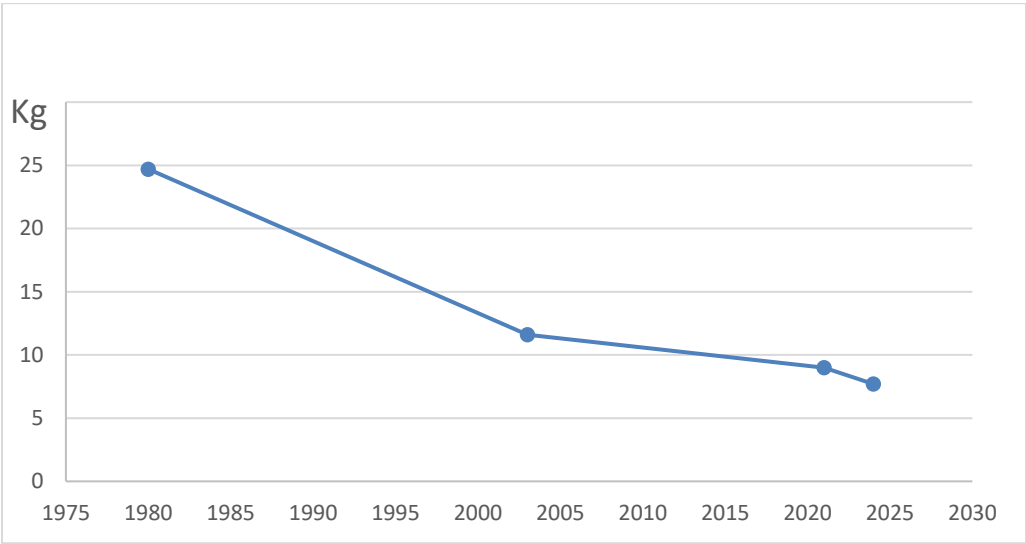
Consumption

Mexico's annual per capita bean consumption has declined significantly over the past several decades. It fell from 24.7 kilograms per year in 1980 to 11.6 kilograms in 2003, 9 kilograms in 2021, and 7.7 kilograms in 2024.

Several factors contribute to this decline. The time-consuming nature of cooking dried beans may deter some consumers. Rising purchasing power among some income groups has increased consumption of alternative protein sources, such as beef and poultry. At the same time, price-sensitive segments of the Mexican population have substituted beans with more affordable plant-based alternatives such as lentils, rice, and pasta. The rural exodus to urban centers has also contributed, leading to changes in dietary habits. Bean consumption is often perceived as a food for the poor, while processed foods have become more readily available and preferred.

Added-value products are concentrated in the canned industry, with cooked beans. There has also been a notable increase in sales of beans packed in pouches, offering convenience to consumers. This type of packaging can be microwaved and resealed after use. Markets have also seen the launch of healthier cooked options like low-fat and low-sodium prepared beans.

Figure 8. Evolution of Annual Per Capita Bean Consumption (1980 – 2025)



Data Source: Agricultural Panorama [SIAP](#), 2024; Bean Cultivation Present and Future for Mexico, INIFAP, 2021

Marketing

In Mexico, beans are primarily marketed in bulk. Producers sell to intermediary traders, who play a significant role in distributing beans in bulk to major points of sale throughout the country. Processed beans are sold through various channels, including local markets, supermarkets, and convenience stores.

The federal government's intervention in the bean marketing chain primarily involves establishing guaranteed prices to mitigate market price fluctuations. However, the scope of this program is limited to major producing states.

Mexico is the largest U.S. market for black and pinto beans. According to the U.S. Dry Bean Council, U.S. bean exports to Mexico benefit from established relationships between U.S. suppliers and Mexican importers, market proximity, and buyer perceptions about quality. In addition, there is a historical importance of beans in Mexican diets and their central role in the country's food culture.

Policy

Federal Government Programs

The GOM considers beans a strategic crop for achieving food sovereignty and has, therefore, implemented programs to support domestic bean production.

[Kilo por Kilo](#) is a program that operates in states like Zacatecas in collaboration with state agricultural secretariats. Launched in 2019 to tackle seed shortages, it supports producers with up to 30 hectares of rainfed land or 5 hectares of irrigated land by providing them with bean grain for sowing. Producers receive 30 kilograms of seeds per accredited hectare, with a maximum support of 900 kilograms per producer. After harvest, they must return the same amount of seed they received. While Kilo por Kilo can provide short-term relief for seed shortages, it primarily distributes regular bean grain rather than improved varieties better adapted to extreme weather challenges.

[PIMAF](#), a component of the "Support Program for Small Producers" since 2018, aims to enhance corn and bean production. It provides financial assistance for technological packages, certified seeds, and inputs like fertilizers and pest control tailored to individual producers' needs. In 2024, PIMAF received a significant investment of 15.2 billion pesos (USD 0.76 billion) to support the cultivation of various strategic crops, including beans, corn, wheat, rice, and others. This direct support to producers makes verifying the impact on production challenging. In 2024, PIMAF allocated 802.3 million pesos (USD 40 million) to 73,009 bean producers, covering 578,663 Ha (38.5 percent of the planted area). In 2021, the

[Certified Bean Seed Program](#) was launched to promote the use of certified bean seeds in several Mexican states, initially focusing on Chihuahua, Durango, and Zacatecas, with subsequent expansion to San Luis Potosí, Nayarit, Quintana Roo, and Yucatán. This project benefited 5,945 producers in 2022. During the 2024 Spring-Summer cycle, the Secretariat of Agriculture and Rural Development (SADER) reported the distribution of 1,230 tons of certified bean seed. This support targeted farmers cultivating up to five Ha of beans, covering an estimated 41,267 Ha, or 3.4 percent of the total bean planted area during that cycle. This initiative will continue under the "self-sufficiency bean initiative" framework to further encourage the adoption of certified seeds (see below).

[The Fertilizer for Well-being](#) program provides small-scale bean producers with up to 600 kilograms of fertilizer free of charge. Launched in Guerrero in 2019, the program gradually expanded its reach. In 2020 and 2021, it was extended to Morelos, Puebla, and Tlaxcala. By 2022, coverage increased to include Chiapas, Durango, Nayarit, Oaxaca, and Zacatecas. Finally, in 2023, the program achieved national coverage. The bean-planted area covered by this program and its impact on production is not known.

The [Guaranteed Prices for Basic Food Products](#) program operates nationally, focusing on eligible producers in regions where specific grains are cultivated. Payments to individual producers are subject to budget availability. For bean producers, the program allows those with up to 30 Ha of rainfed land or five Ha of irrigated land to sell up to 15 tons of their harvest to the GOM at a guaranteed price of 27,000 pesos (USD \$1,350) per ton in 2025. From September 1, 2023, to June 30, 2024, the GOM³ collected 4.6 thousand tons of beans from 750 producers under this program. This represents a small fraction (0.01 percent) of the estimated 570,000 bean producers nationwide. The program generated purchases of 82.5 million pesos (USD \$4.1 millions). Despite the program's benefits, producers continue to report delays in receiving payments for their production collected by SEGALMEX.

President Claudia Sheinbaum is promoting a [Self Sufficiency Bean Initiative](#). According to SADER, the aim is to boost bean production by about 30 percent in six years to replace imports of beans. The GOM will set up research centers to supply higher-yielding bean seeds. The GOM aims to provide nearly 25,000 tons of seeds to plant about 740,000 Ha of beans, with the first tranche of about 12,000 seeds in 2025. The GOM announced that the Seed Producing Company for Well-Being (PROSEBIEN) will be created in 2025 to provide high-quality seeds to bean producers in Zacatecas. Information is not available about when this state company will start to produce seeds and if there will be investment to improve seeds.

Attachments:

No Attachments.

³ https://www.gob.mx/cms/uploads/attachment/file/941335/6IL_AGRICULTURA_300824_compressed.pdf