

COVID-19 Update September 20, 2020

As of September 20, 2020, there are 697,663 confirmed cases and 79,155 suspected cases of coronavirus in Mexico. There have been 809,373 negative cases, 729,985 positive cases, 73,493 confirmed deaths, and 499,302 recovered persons. Nationally, 70% of general hospitalization beds are available and 30% occupied. In beds with ventilators, 76% are available and 24% occupied.

Some Mexican states re-open their public spaces after changing to the yellow color of the coronavirus epidemiological traffic light. Beaches, cultural centers, and important archeological zones, even movie theaters, gyms, and bars can reopen, with the proper health recommendations.

Schools will not return to classes until the traffic light is green, but teachers will start going to schools to prepare for the eventual return.

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MEXICO 2020 SPRING-SUMMER DRY BEAN PLANTING REPORT

OFFICIAL 2020 SPRING-SUMMER CYCLE MEXICO DRY BEANS PLANTING SEASON IRRIGATED + DRYLAND SITUATION UNTIL AUGUST 31, 2020								
STATE	SURFACE - HECTARES				PRODUCTION - MT		YIELD MT/HA	
	programmed	planted	harvested	damaged	programmed	obtained	programmed	obtained
CHIAPAS	72,057.86	67,736	5,024		40,892.03	2,698	0.57	0.537
CHIHUAHUA	112,137.76	73,841		6,000	102,039.32		0.91	
DURANGO	244,423.70	235,828	3		140,762.13	4	0.58	1.35
GUANAJUATO	69,054.00	68,445	1,359		53,100.76	3,049	0.77	2.244
GUERRERO	13,486.56	12,408	723		10,642.28	642	0.79	0.888
MEXICO	4,762.35	4,307			5,053.01		1.06	
MICHOACAN	2,938.53	2,478			3,663.68		1.25	
OAXACA	30,281.59	29,242			21,909.38		0.72	
PUEBLA	58,813.74	46,735	2,577		50,853.13	3,225	0.86	1.252
QUERETARO	370	4,248			620.1		1.68	
SAN LUIS POTOSI	122,008.40	123,267	540		60,241.64	1,083	0.49	2.006
ZACATECAS	670,136.22	657,834		71	472,168.66		0.7	
OTHER	69,626	68,683	5,346	5	54,670	8,046		
TOTAL	1,470,097.25	1,395,052	15,272	6,076	1,016,615.91	18,747	0.69	1.228

SOURCE: SADER – SIAP

2020 SPRING-SUMMER CYCLE REPORT, SEPTEMBER 14th Update

- SIAP is reporting until August 31 (latest report above published Set 14), high numbers in planted hectares, especially in Zacatecas and Durango, which are not in line with the observed in the field inspections made during the USDBC Assessment in the last week of July – first of August, when planting season had been closed, and in a season when it was widely known that producers were lacking bean seed to plant, especially pinto Saltillo seed.
- Assessment numbers for Durango were 170,925 hectares vs. SIAP's 235,828 hectares reported here, almost 65 thousand more, and for Zacatecas the assessment estimated 574,247 vs SIAP's 657,834, a difference of 100 thousand hectares
- SIAP's reporting on Zacatecas and Durango together, show an excess of 165 thousand hectares, however, these numbers can be considered exaggerated.
- Chihuahua numbers in this report with 73,841 hectares planted, seem to be within range with the assessment's estimation of 69,082 has., however, the 6 thousand hectares damaged reported here, seem to be small considering that they continued suffering drought through August. The next September report should reflect the more real extent of the damage
- Weather has been favorable in Zacatecas, Guanajuato and San Luis Potosi. Durango has not received as much rainfall as expected, however, conditions have been rather favorable. Chihuahua continued suffering lack of precipitations through September

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FOR YOUR REFERENCE:

AUGUST 31, 2020 UPDATE 5Y PLANTING-PRODUCTION BEHAVIOR						
SPRING-SUMMER	PROGRAMMED PLANTING AREA HECTARES					
MEXICO BEAN CROP	2015	2016	2017	2018	2019	2020 INTENTION
Zacatecas	608,288	622,082	629,563	658,501	662,527	670,136
Durango	254,676	253,974	246,789	250,324	253,039	244,424
Chihuahua	133,013	129,151	129,177	119,750	109,201	112,138
Chiapas	74,055	73,200	73,432	70,602	72,746	72,058
San Luis Potosi	115,626	128,837	118,475	116,317	115,267	122,008
Guanajuato	89,209	80,958	77,569	75,319	69,958	69,054
Other States	229,325	239,894	210,274	179,223	182,720	180,279
Total	1,504,192	1,500,767	1,485,279	1,470,036	1,465,458	1,470,097
SPRING-SUMMER	PLANTED HECTARES					
MEXICO BEAN CROP	2015	2016	2017	2018	2019 (FEB 2020 FINAL)	2020/AUGUST 31, 2020
Zacatecas	560,000	614,082	639,518	660,278	525,142	657,834
Durango	246,000	244,686	245,415	220,336	174,689	235,828
Chihuahua	125,000	123,059	112,556	98,578	86,398	73,841
Chiapas	73,098	73,276	71,426	70,071	71,978	67,736
San Luis Potosi	116,000	97,029	110,144	113,627	87,565	123,267
Guanajuato	82,000	74,153	65,436	70,112	67,289	68,445
Other States	236,595	189,978	183,981	169,027	168,608	135,352
Total	1,438,693	1,416,263	1,428,476	1,402,029	1,181,669	1,395,052
SPRING-SUMMER	PRODUCTION MT					
MEXICO BEAN CROP	2015	2016	2017	2018	2019 (FEB 2020 UPDATE)	2020/AUGUST 31, 2020
Zacatecas	290,213	387,824	400,886	421,773	259,082	0
Durango	111,878	124,606	129,372	101,231	53,218	4
Chihuahua	95,247	101,982	87,548	85,538	58,962	0
Chiapas	35,971	40,913	39,751	39,794	39,892	2,698
San Luis Potosi	41,371	24,220	41,328	28,017	7,778	1,083
Guanajuato	53,036	52,131	40,508	49,883	45,912	3,049
Other States	147,327	143,324	137,753	126,117	115,497	11,913
Total	775,043	875,000	877,146	852,353	580,341	18,747

SOURCE: SADER – SIAP



- Planting season: Traditionally starts in June nationwide if rain season is on time: 26% of the rain fed beans are planted in June, 48% in July and around 15% in August
- Harvesting Season: Late September for early planted, October – November for the later planted
- Prices paid to producers in production areas in the last days of June and first week of July for irrigated beans were 15,000 pesos / US\$626 per MT for black beans and 25,000 pesos / US\$1,041 per MT for Pinto beans



ZACATECAS - PANFILO NATERA



DURANGO - CANATLAN - EJIDO SAN JOSE DE GRACIA

MEXICAN Market Situation as of September 14th, 2020

- The market has started to move and importers have shown more purchasing intention for US beans
- Mexican crop is expected to be regular to good however, it is still early to know, and Pinto Saltillo beans availability is in question since Chihuahua has struggled with a drought. Therefore, pintos will continue to be on-demand
- Black bean production in Mexico this cycle is expected to be good, but again, still early to know and importers have shown interest in US black beans in the last weeks
- Although there is no information available, the trade considers that the possibility of importing beans from other countries (Argentina) outside USMCA is very small.

SEGALMEX CARRYOVER / INVENTORIES NO UPDATE AVAILABLE IN SEPTEMBER 2020

- No official information on current inventories, but apparently, they have around 80 thousand MT of mainly black beans as most of the pintos were sold last month.



2020 MULTI-YEAR BEAN QUOTA 100 thousand MT FROM COUNTRIES OUTSIDE USMCA

- No information on permits issued for this quota until mid-September
- Reportedly no permits have been requested until mid-September
- Argentina and China remain the potential competitors, however, no imports are expected from these countries
- Remember that: In order to use these permits, the importer has to take the risk of purchasing the beans first and then, they have to apply for the permit.

IMPORTS – JULY 2020

Accumulated Imports October 2019 – July 2020

- Mexico's accumulated bean imports in the 10 months of the 2019/2020 Commercial Year, from all origins until July amounted 100,450 MT, with a value of US\$85.6 million
- From these, 92,881 MT were U.S beans with a value of US\$78.5 million
- From October 2019 to July 2020 Mexico has imported:
 - 53,399 MT of U.S black beans
 - 38,568 MT of U.S pinto beans
 - 914 MT of U.S white beans

2019/2020 COMMERCIAL YEAR Mexico's Dry Bean Definitive Imports - All Countries					
Accumulated Period: 2019 October - 2020 July					
DESCRIPTION	MEASURE UNIT	COUNTRY OF ORIGIN	VOLUME IN KILOGRAMS	VOLUME METRIC TONS	COMMERCIAL VALUE (USD)
White beans Except for planting 0713.33.02	Kg	CANADA			
White beans Except for planting 0713.33.02	Kg	USA	914,094	914	1,063,818.00
					\$1,063,818
Black beans except for planting 0713.33.03	Kg	CANADA	4,209,790	4,209	4,835,388.00
Black beans except for planting 0713.33.03	Kg	USA	53,398,761	53,399	43,346,515.00
Black beans except for planting 0713.33.03	Kg	MEXICO	477,667	478	383,110.00
					\$48,565,013
The rest of the beans (pintos and other) 0713.33.99	Kg	CANADA	2,658,882	2,659	1,704,342.00
The rest of the beans (pintos and other) 0713.33.99	Kg	USA	38,568,431	38,568	34,103,860.00
The rest of the beans (pintos and other) 0713.33.99	Kg	MEXICO	221,056	221	223,850
The rest of the beans (pintos and other) 0713.33.99	Kg	UNDECLARED COUNTRY	2,177	2	2,304.00
					36,034,356.00
GRAND TOTAL			100,450,858.00	100,450	\$85'663,187

SOURCE: SIAP-SAGARPA WITH IMPORTS DATA FROM THE MEXICAN TAX REVENUE SERVICE, VERITRADE, SIAVI



JAN-JULY 2020 Mexico's Calendar Year Accumulated Dry Bean Definitive Imports - All Countries

DESCRIPTION	MEASURE UNIT	COUNTRY OF ORIGIN	VOLUME IN KILOGRAMS	VOLUME METRIC TONS	COMMERCIAL VALUE (USD)
White beans Except for planting 0713.33.02	Kg	CANADA	0.00	0	0.00
White beans Except for planting 0713.33.02	Kg	USA	426,837.00	426.80	483,696.00
					\$483,696
Black beans except for planting 0713.33.03	Kg	CANADA	5,591,452	5,591	3,897,219
Black beans except for planting 0713.33.03	Kg	USA	30,979,526	30,979	26,191,571
Black beans except for planting 0713.33.03	Kg	MEXICO	477,667	478	350,638
					\$30,439,428
The rest of the beans (pintos and other) 0713.33.99	Kg	CANADA	1,839,436	1,839	1,224,670
The rest of the beans (pintos and other) 0713.33.99	Kg	USA	20,040,747	20,041	18,976,768
The rest of the beans (pintos and other) 0713.33.99	Kg	MEXICO	221,056	221	159,600
The rest of the beans (pintos and other) 0713.33.99	Kg	UNDECLARED COUNTRY	2,177	2.00	2,304
					\$20,363,342
GRAND TOTAL			59,578,898.28	59,577.80	\$51,286,466

SOURCE: SIAP-SAGARPA WITH IMPORTS DATA FROM THE MEXICAN TAX REVENUE SERVICE, VERITRADE, SIAVI

2020 July Mexico's Dry Bean Definitive Imports - All Countries

DESCRIPTION	MEASURE UNIT	COUNTRY OF ORIGIN	VOLUME IN KILOGRAMS	VOLUME METRIC TONS	COMMERCIAL VALUE (USD)
White beans Except for planting 0713.33.02	Kg	CANADA	0.00	0	0.00
White beans Except for planting 0713.33.02	Kg	USA	0		0.00
Black beans except for planting 0713.33.03	Kg	CANADA	1,063,555	1,063	986,123
Black beans except for planting 0713.33.03	Kg	USA	2,015,471	2,015	1,773,888
					2,760,011
The rest of the beans (pintos and other) 0713.33.99	Kg	CANADA	141,451	141	137,000
The rest of the beans (pintos and other) 0713.33.99	Kg	USA	1,078,843	1,078	1,227,818
					1,364,818
GRAND TOTAL			4,299,320	4,299	4'124,829

SOURCE: SIAP-SAGARPA WITH IMPORTS DATA FROM THE MEXICAN TAX REVENUE SERVICE, VERITRADE, SIAVI

2020 June Mexico's Dry Bean Definitive Imports - All Countries

DESCRIPTION	MEASURE UNIT	COUNTRY OF ORIGIN	VOLUME IN KILOGRAMS	VOLUME METRIC TONS	COMMERCIAL VALUE (USD)
White beans Except for planting 0713.33.02	Kg	CANADA	0.00	0	0.00
White beans Except for planting 0713.33.02	Kg	USA	0		0.00
Black beans except for planting 0713.33.03	Kg	CANADA	1,369,155	1,369	1,281,639
Black beans except for planting 0713.33.03	Kg	USA	2,433,188	2,433	2,116,972
					3,398,611
The rest of the beans (pintos and other) 0713.33.99	Kg	CANADA	291,438	291	308,581
The rest of the beans (pintos and other) 0713.33.99	Kg	USA	2,535,219	2,535	2,618,545
					2,927,126
GRAND TOTAL			6,629,000	6,629	\$6'325,737

SOURCE: SIAP-SAGARPA WITH IMPORTS DATA FROM THE MEXICAN TAX REVENUE SERVICE, VERITRADE, SIAVI



FOR YOUR REFERENCE: 10 YEARS OF IMPORTS

- AVERAGE IS 120 Thousand MT

2010-2019 U.S. DRY BEANS MEXICO IMPORTS METRIC TONS										
TARIFF CODE / DESCRIPTION	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
White beans Except for planting 0713.33.02	2,568	1,751	3,000	3,562	1,599	3,072	12,000	6,355	5,659.52	4,437
Black beans except for planting 0713.33.03	83,065	74,434	55,504	60,099	63,973	64,297	79,000	67,895	78,931.69	65,632
The rest of the beans (pintos and other) 0713.33.99	21,252	18,352	113,829	53,528	10,289	15,307	71,000	58,716	56,694.00	44,417
TOTAL	106,876	94,537	172,333	117,189	75,861	82,676	162,000	132,966	141,285.21	114,486

SOURCE: SIAP-SAGARPA WITH IMPORTS DATA FROM THE MEXICAN TAX REVENUE SERVICE, VERITRADE, SIAVI



CHIHUAHUA - CUSIHUIRACHI - CARBAJAL DE ABAJO - 04/08/20

Central Market Prices and Sales Analysis by USDBC



Monterrey Central Market

CENTRAL MARKET PRICES AND SALES 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 August** registered slight reductions vs. May, however still in the range of 30 pesos / US\$1.36 per kilo in Mexico City and Monterrey. Highest price was registered in Guadalajara at 35 pesos / US\$1.59 per kilo
- Mexican black beans remained at prices from 22 to 25 pesos/ US\$0.95 to US\$1.08 per kilo. Price differential MX vs. US blacks continued to be high in this period.
- **US Pinto beans average prices in August**, remained in the 30 pesos / US\$1.36 area
- Mexican pintos in August in the most important markets were at prices very similar to US pintos.
- **U.S. Large and Small Alubias average prices in August** remained at high prices from 43 to 29 pesos / US\$1.86 to US\$1.23
- **Peruanos, Mayocoba, Azufrados prices in August 2020** registered important increases of up to 52% vs. May, at prices from 45 to 48 pesos / US\$2.04 to US\$2.18
- **Colored varieties: Bayos, Canarios, Cacahuate, Flor de Mayo and Flor de Junio.** –had increases in August, of up to 25%, at prices from 25 to 40 pesos / US\$1.13 to US\$1.81 per kilo

Wholesale and Semi-Wholesale Prices Report

MONTHLY CENTRAL MARKET WHOLESALE AND SEMI-WHOLESALE REPORT							
PRODUCT	product origin	MEXICO CITY price (\$/KG)		VAR	MONTERREY price (\$/KG)		VAR
VARIETY	state / country	current 30 08 20	past 30 05 20	%	current 30 08 20	past 30 05 20	%
Imported Black	Imported	29.00	31.00	-6.45%	30.00	33.00	21.15%
Jamapa Black	Zacatecas						
Nayarit Black	Nayarit	23.00					
Bola Black	Zacatecas	25.00	25.00	0.00%			
Veracruz Black	Veracruz	23.00	25.00	-8.00%			
Imported Pintos	Imported	33.00	33.00	0.00%	32.00	38.00	-15.79%
Pinto Saltillo	Zacatecas						
Pinto Saltillo	Nayarit	33.00					
Pinto Saltillo	Chihuahua	31.50	26.00	21.15%	29.00	32.00	21.15%
Pinto Saltillo	Durango					19.00	0.00%
Small Alubia	Imported	33.00	33.00	29.00%	38.00	34.00	11.76%
Large Alubia	Imported	29.00	29.00	0.00%	38.00	38.00	0.00%
Flor de Junio	Zacatecas	33.00	38.00	-13.16%		38.00	0.00%
Flor de Mayo	Zacatecas	40.00	39.00	2.56%			
Bayo Berrendo	Jalisco						
Bayo	Zacatecas	33.50	34.00	-1.47%			
Garbancillo	Zacatecas		20.00	-100.00%			
Canario	Sinaloa	25.00					
Cacahuete Bola	Jalisco	38.00	35.00	8.57%			
Garbancillo Zarco	Jalisco			0.00%			
Azufrado	Sinaloa						
Mayocoba	Sinaloa						
Peruano	Sinaloa	45.00	38.50	16.88%	48.00	41.00	21.15%
Small Chickpea	Sinaloa	25.00	22.00	13.64%	22.00	22.00	0.00%
Large Chickpea	Sinaloa	27.50	30.00	-8.33%	22.00	30.00	-26.67%

PRODUCT	product origin	GUADALAJARA price (\$/KG)		VAR	SINALOA price (\$/KG)		VAR
VARIETY	state / country	current 30 08 20	past 30 05 20	%	current 30 08 20	past 30 05 20	%
Imported Black	Imported	35.00	35.00	0.00%			
Jamapa Black	Zacatecas			0.00%			
Nayarit Black	Nayarit	23.00	22.00	4.55%			
Bola Black	Zacatecas	23.00	22.00	4.55%			
Veracruz Black	Veracruz	22.00		0.00%			
Imported Pintos	Imported	28.00		0.00%			
Pinto Saltillo	Zacatecas						
Pinto Saltillo	Nayarit	33.00	30.00	10.00%			
Pinto Saltillo	Chihuahua	24.50		0.00%			
Pinto Saltillo	Durango						
Small Alubia	Imported	38.00	36.00	5.56%			
Large Alubia	Imported	43.00	45.00	-4.44%			
Flor de Junio	Zacatecas	28.00	31.00	-9.68%			
Flor de Mayo	Zacatecas	30.00	29.00	3.45%			
Bayo Berrendo	Jalisco	25.00	25.00	0.00%			
Bayo	Zacatecas	19.00	19.00	0.00%			
Garbancillo	Zacatecas	20.00		0.00%			
Canario	Sinaloa	25.00	20.00	25.00%			
Cacahuete Bola	Jalisco	33.00		0.00%			
Garbancillo Zarco	Jalisco			0.00%			
Azufrado	Sinaloa	31.00	29.00	6.90%	34.75	32.00	8.59%
Mayocoba	Sinaloa	45.00	29.50	52.54%	34.75	33.50	3.73%
Peruano	Sinaloa	45.50	31.50	44.44%	34.75	33.50	3.73%
Small Chickpea	Sinaloa	22.00	22.00	0.00%			0.00%
Large Chickpea	Sinaloa	24.00	26.00	-7.69%	18.50	20.00	-7.50%



MONTH: August 2020 vs. May 2020
MONTHLY CENTRAL MARKET WHOLESALE AND SEMI-WHOLESALE REPORT

PRODUCT	product origin	ZACATECAS price (\$/KG)		VAR	MERIDA price (\$/KG)		VAR
		current 30 08 20	past 30 05 20		current 30 08 20	past 30 05 20	
VARIETY	state / country			%			%
Imported Black	Imported						
Jamapa Black	Zacatecas	25.00			18.00	18.00	0.00%
Nayarit Black	Nayarit						
Bola Black	Zacatecas	18.00	21.00	-14.29%	24.00	24.00	0.00%
Veracruz Black	Veracruz						
Imported Pintos	Imported						
Pinto Saltillo	Zacatecas	30.00	28.00	7.14%			
Pinto Saltillo	Nayarit						
Pinto Saltillo	Chihuahua			0.00%			
Pinto Saltillo	Durango						
Small Alubia	Imported	25.00	20.00	25.00%	38.50	37.00	4.05%
Large Alubia	Imported	30.00	25.00	20.00%			
Flor de Junio	Zacatecas	29.00	30.00	-3.33%			
Flor de Mayo	Zacatecas	30.00	30.00	0.00%	32.00	32.00	0.00%
Bayo Berrendo	Jalisco						
Bayo	Zacatecas	30.00	30.00	0.00%	36.00	36.00	0.00%
Garbancillo	Zacatecas			0.00%			
Canario	Sinaloa						
Cacahuete Bola	Jalisco			0.00%			
Garbancillo Zarco	Jalisco			0.00%			
Azufrado	Sinaloa						
Mayocoba	Sinaloa						
Peruano	Sinaloa	42.00	38.00	10.53%			

PRODUCT	product origin	DURANGO price (\$/KG)		VAR	NAYARIT price (\$/KG)		VAR
		current 30 08 20	past 30 05 20		current 30 08 20	past 30 05 20	
VARIETY	state / country			%			%
Imported Black	Imported	NA	NA		NA	NA	
Jamapa Black	Zacatecas						
Nayarit Black	Nayarit	NA	NA		25.00		
Bola Black	Zacatecas						
Veracruz Black	Veracruz						
Imported Pintos	Imported						
Pinto Saltillo	Zacatecas						
Pinto Saltillo	Jalisco				19.00		
Pinto Saltillo	Chihuahua						
Pinto Saltillo	Durango						
Small Alubia	Imported						
Large Alubia	Imported						
Flor de Junio	Zacatecas				19.00		
Flor de Mayo	Zacatecas				20.00		
Bayo Berrendo	Jalisco						
Bayo	Zacatecas				23.00		
Garbancillo	Zacatecas				22.00		
Canario	Sinaloa						
Cacahuete Bola	Jalisco						
Garbancillo Zarco	Jalisco						
Azufrado	Nayarit				20.00		
Mayocoba	Sinaloa				27.00		
Peruano	Nayarit				35.00		



WEATHER REPORT

July-August-September Perspective.- The National Water Commission reported that the national precipitation forecast for July, August and September: <https://smn.conagua.gob.mx/es/climatologia/pronostico-climatico/precipitacion-form>, which are the bean planting months and part of the growing cycle, will be slightly higher than the average.

August Drought Monitor Follow-up: as you can see in the images below, drought conditions prevailed Chihuahua and north of Durango, however, Chihuahua is the one that suffered more damage in the bean areas, with over 95% of its territory suffering some degree of drought



STATE	% With NO DAMAGE	AREA % WITH DAMAGE				
		D0	D1	D2	D3	D4
Aguascalientes	96.7	3.3	0.0	0.0	0.0	0.0
Baja California	68.4	31.6	0.0	0.0	0.0	0.0
Baja California Sur	52.9	47.1	0.0	0.0	0.0	0.0
Campeche	92.0	8.0	0.0	0.0	0.0	0.0
Coahuila de Zaragoza	22.6	36.7	34.4	5.7	0.6	0.0
Colima	94.9	5.1	0.0	0.0	0.0	0.0
Chiapas	76.3	23.7	0.0	0.0	0.0	0.0
Chihuahua	3.9	37.3	29.8	33.7	5.3	0.0
Ciudad de México	73.9	26.1	0.0	0.0	0.0	0.0
Durango	26.4	22.6	29.6	21.4	0.0	0.0
Guanajuato	56.1	42.1	1.8	0.0	0.0	0.0
Guerrero	14.0	30.3	28.6	24.8	2.3	0.0
Hidalgo	54.0	33.7	12.3	0.0	0.0	0.0
Jalisco	46.4	41.4	13.2	0.0	0.0	0.0
Estado de México	38.7	47.7	13.6	0.0	0.0	0.0
Michoacán de Ocampo	15.0	40.4	37.5	7.1	0.0	0.0
Morelos	52.4	43.8	3.8	0.0	0.0	0.0
Nayarit	56.3	38.2	5.5	0.0	0.0	0.0
Nuevo León	100.0	0.0	0.0	0.0	0.0	0.0
Oaxaca	40.7	23.6	39.7	15.2	0.8	0.0
Puebla	65.4	31.9	2.7	0.0	0.0	0.0
Querétaro de Arteaga	37.4	55.2	7.4	0.0	0.0	0.0
Quintana Roo	48.6	51.4	0.0	0.0	0.0	0.0
San Luis Potosí	63.0	26.6	10.4	0.0	0.0	0.0
Sinaloa	8.8	64.0	27.2	0.0	0.0	0.0
Sonora	4.1	52.5	34.1	9.2	0.1	0.0
Tabasco	81.9	18.1	0.0	0.0	0.0	0.0
Tamaulipas	72.7	22.3	0.0	0.0	0.0	0.0
Tlaxcala	48.5	51.5	0.0	0.0	0.0	0.0
Veracruz	32.2	45.4	20.9	1.5	0.0	0.0
Yucatán	100.0	0.0	0.0	0.0	0.0	0.0
Zacatecas	87.7	9.3	3.0	0.0	0.0	0.0

Three-month Precipitation Perspective

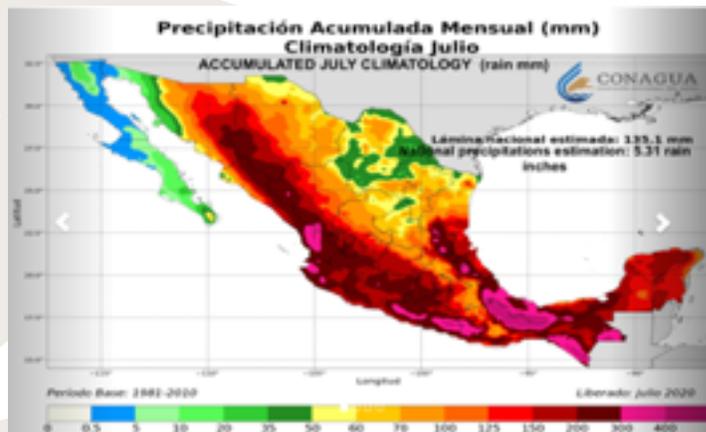
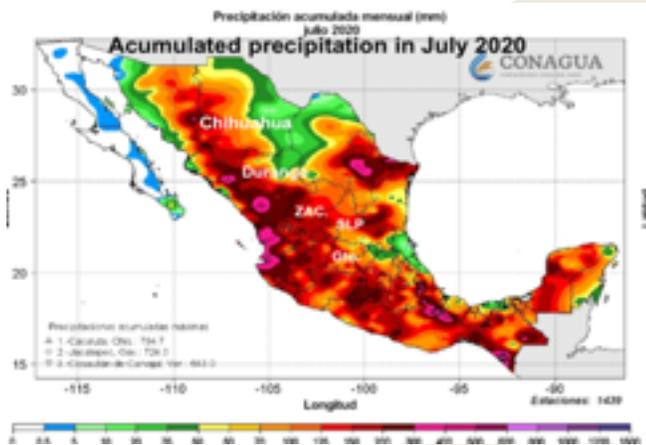
The following maps show the actual accumulated precipitations received in July and August and the precipitations perspective for September. As it can be seen in the August map, Chihuahua lacked precipitations in comparison with the climatology and until the first week of September, this state did not get much water either. These three months are the most important since in this period happens the planting, growing and production stages of the bean plants.



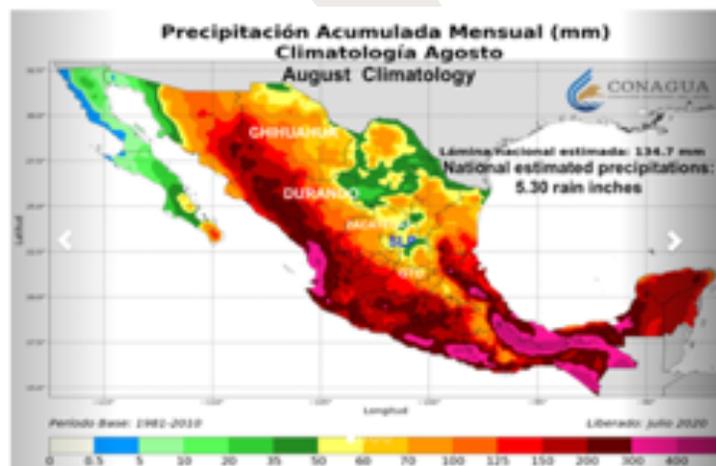
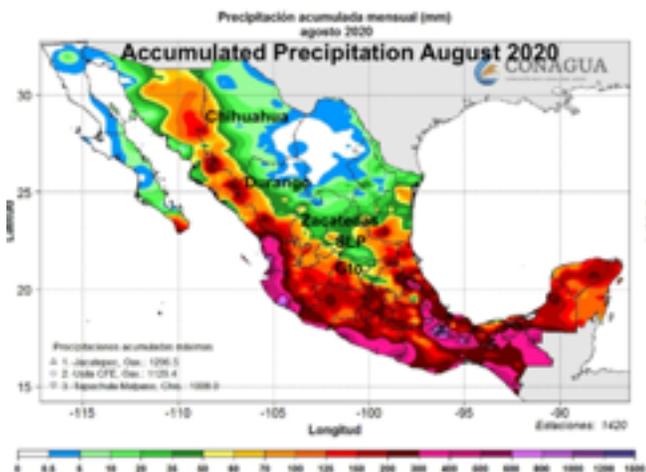
ACCUMULATED PRECIPITATIONS

CLIMATOLOGY – historic average

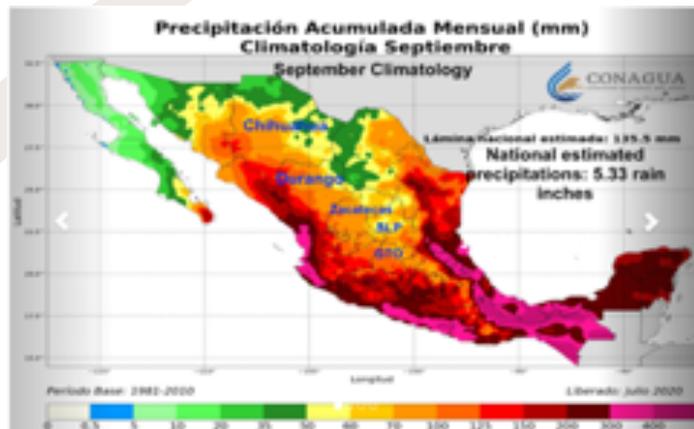
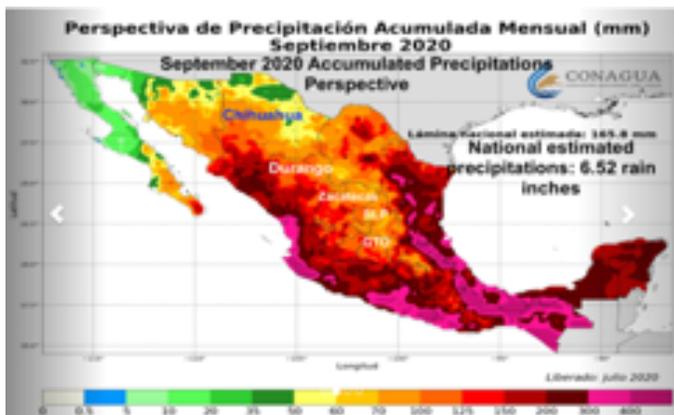
JULY 2020



AUGUST 2020



SEPTEMBER 2020



Mexico Economic Report August 2020

Mexico's Main Economic Indicators	Information Available September 15, 2020
Population - 2015 update (INEGI)	119.5 million
National GDP Growth Annual (est. Dec 2019)	0.00%
Average Exchange Rate Avg. Aug. 2020	22.22 pesos per U.S dollar (BANXICO)
Unemployment Rate July 2020	5.40%
Inflation Rate Y/accu to August 2020	4.05%
Mexican Crude Oil Price August 31, 2020	US\$40.85 per barrel (PEMEX)
International Reserves September 11, 2020	US\$193.31 billion
Trade Balance Imports-Exports Y2019 USA-MX	US\$614.4 billion

Source: BANXICO, INEGI, SAT, oilbmex, PEMEX

The Mexican economy is starting to show signs of recovery, with slight positive numbers in the short term, and according to the economists, a solid recovery will depend on the solution of the pandemic, which could be in the form of a COVID-19 vaccine or better therapeutics for it. Until mid-September, Mexico has accumulated over 72 thousand COVID-19 deaths and over 638 thousand cases of infected people.

On September 1st, the Mexican President Andres-Manuel Lopez-Obrador (AMLO), made his second Address to the Nation, presenting the results of his second year in office. With little positive arguments, highlights included:

- Mexico has secured the access to the AstraZeneca COVID-19 vaccine, in collaboration with Argentina to guarantee and distribute in both countries.
- 23 million families have been benefited through the Social Programs
- Economic recovery will be in V shape with a fast recovery in 2021, and Mexico will not acquire more debt
- Revenue from Mexicans working abroad increased 10% vs. 2019 and are

estimated to reach US\$40 billion in 2020

- Jobs created in August reached 93 thousand
- Exchange rate has remained stable

Analysts said that Mexico's fast recovery will be unlikely, due to the profound economic drop of 18.7% in Q2, the insufficient support programs and lack of fiscal stimulus to aid businesses. Current forecast remains a GDP reduction of 9.9% in 2020 and a recovery of 3.5% in 2021.

This forecast differs from the announced by the Secretary of the Revenue Arturo Herrera. He considered that Mexico's GDP in 2021, will recover 4.6%, given the COVID-19 circumstances.

Secretary Herrera also stated that he estimates an exchange rate of 21.9 pesos per U.S dollar and Mexican oil prices around US\$42 per barrel, and an expected production of 1,857 million barrels per day.

In August, inflation rate surpassed the Government's objective of 3+/- 1 point, reaching 4.05%, the highest since May 2019 when it reached 4.28% and accumulating the fourth consecutive month with increases. Also, in



August, the Consumer Confidence Index, that measures the willingness to buy duration goods, had a decrease of 8.77 points annual, the smallest drop since March when confinement started. Private consumption in June registered a reduction of 19.6% annual, the lowest reduction since March, and recovering from the historic falls in April 22.2% and May 23.5%. Consumption of imported goods decreased 19.2% in comparison with June 2019 and of domestic goods decreased 15.7% in the same period.

In July, Mexico recovered the ranking as number one trading partner with the United States, exporting more than US\$173 billion between January and July 2020. Total trade between the two countries was US\$290.6 billion, higher than the total trade with Canada (US\$288 billion) and china (US\$280 billion).

Exchange Rate

Average exchange rate in August 2020 was 22.22 pesos per US dollar. Exchange rate in the last business day of August was 21.86 pesos per US dollar. Average exchange rate in the first half of September is 21.52 pesos per US dollar.

In the first half of September, the Mexican peso continued recovering towards the 21 pesos per US dollar according to financial analysts, due to the higher appetite for risk investment and the weak dollar in the last weeks.



Mexico City Down Town



USDBC Disclaimer: In the following section the USDBC disseminates information published in Newspapers and Magazines related to beans (excerpts). The statements or numbers shown in each article are not necessarily in agreement with the USDBC.

SADER Will Benefit Over 180 Thousand Corn and Beans Producers

Notimundo - September 14, 2020

CDMX. The Undersecretary of Agriculture Victor Suarez, informed that SEGALMEX will buy 300 thousand MT of beans from the Spring-Summer 2020 and Fall-Winter 2021 cycles, paying the guarantee price of 14,500 pesos / US\$659 per MT, from 37,500 small producers in 19 states.

During a video-conference called “Guarantee Prices for Corn and Beans and its Productive and Economic Impact in the Rural Sector”, SADER informed that SEGALMEX has a network of 800 elevators in 30 states, to receive corn and beans to supply DICONSA, the state’s social programs supply and stores instance.

Agreement to Cancel the Sale of Bean Plants in Zacatecas

NTR Zacatecas - September 13, 2020



Zacatecas. Social and bean producers’ organization El Barzon leader Fernando Galvan, announced that the bean plants located in Calera and Sombrerete will not be sold. He stressed that bean producers opposed to the operation and reunited with authorities to sign a document where the government desists on selling the plants. The agreement protects the plants from being sold at least in the remaining years of the current administration.

Grain Production Cost Estimation for the Fall-Winter Cycle

Agrocapsulas.AARFS | El Debate - September 6, 2020



According to the recent analysis, the estimated bean production cost for the 2020/2021 Fall-Winter cycle, will be 25,370 pesos / US\$1,153 per hectare, with an increase of 1.3% vs. the same cycle in 2020. Breakdown per hectare:

Soil preparation: 3,769 pesos / US\$171.31



Seeding labor: 5,098 pesos / US\$231.72
 Fertilizer labor: 2,990 pesos / US\$135.90
 Plague control: 1,155 pesos / US\$52.50
 Cultivation: 2,096 pesos / US\$95.27
 Harvesting labor: 3,781 pesos / US\$171.86
 Other expenses: 6,481 pesos / US\$294.59

SEGALMEX will Resume Second Grain Beans and Corn Purchasing Period in October

La Jornada - September 4, 2020



SEGALMEX announced that they will start their second period purchasing beans and corn and foresees to double the amount purchased in 2019 and reach 1.9 million MT of corn and beans in 30 states. They informed that SEGALMEX assigned 696 million pesos to benefit 5,839 small bean producers in the 2020 Spring-Summer cycle.

Mexico Will Produce About 231,469 MT of Certified Seed in 2020

Diario Libre - September 3, 2020



Mexico. Mexico will produce around 231,469 MT of certified seed in 2020, 3.3% more than the previous year, according to SADER. They informed that in the last 2 years, the production and verification of improved seed has increased and in the first 5 months of 2020, they produced 57,739 MT of seed, corresponding to 163 varieties of 10 crops being the most important corn, potato, soybeans and dry beans.

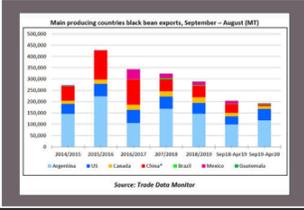


USDBC Smartphone App

Latest 15 published News

2020/05/06	Fan Base for Southeast Asia's Social Media Program Tops 60,000	
2020/05/13	Food Aid Outlook – School feeding more important now than ever	
2020/05/21	Online Content Management System to Feed Into Global Marketing	
2020/05/27	Argentine Planting Season Underway Exports up in 2019/2020	<p>Source: Trade Data Monitor and Softrade</p>
2020/06/04	U.S./United Kingdom (UK) Trade Momentum Builds Towards Opportunities	
2020/06/11	USDBC Following Cuba's Food Import Needs During Covid-19	
2020/06/25	Argentine Dry Bean Planting Season Wraps Up, With the Exception of <u>Alubias</u>	



2020/07/03	Early Reporting Suggests Decline in China Bean Planting Area and Production	
2020/07/11	Focus on BeanCON21 In The Second Half of 2020	
2020/07/17	USDBC and CIA Consulting to collaborate on bean innovation initiative	
2020/07/25	Get To Know Our Global Reps – Mexico	
2020/08/02	New Global Dry Bean Supply/Demand Reporting Available	
2020/08/09	USDBC Trade Servicing Update – Second Half 2020	
2020/08/16	First Ever Virtual Summer Meeting Hits the High Notes	
2020/08/29	U.S. Sustainability Alliance Promotes U.S. Farming Practices to EU Audience	

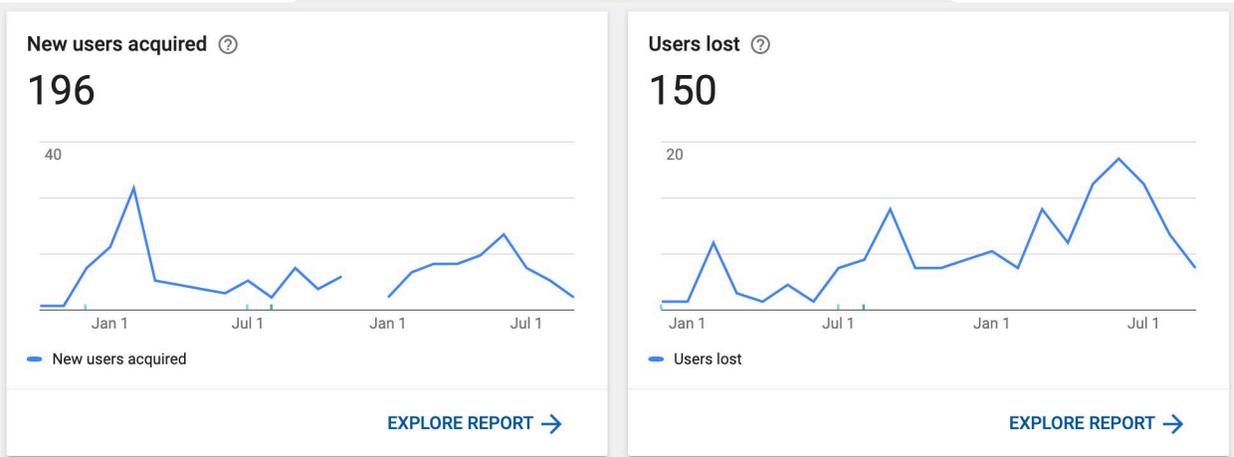


Play Store

App Life Time Results

Installs: 196

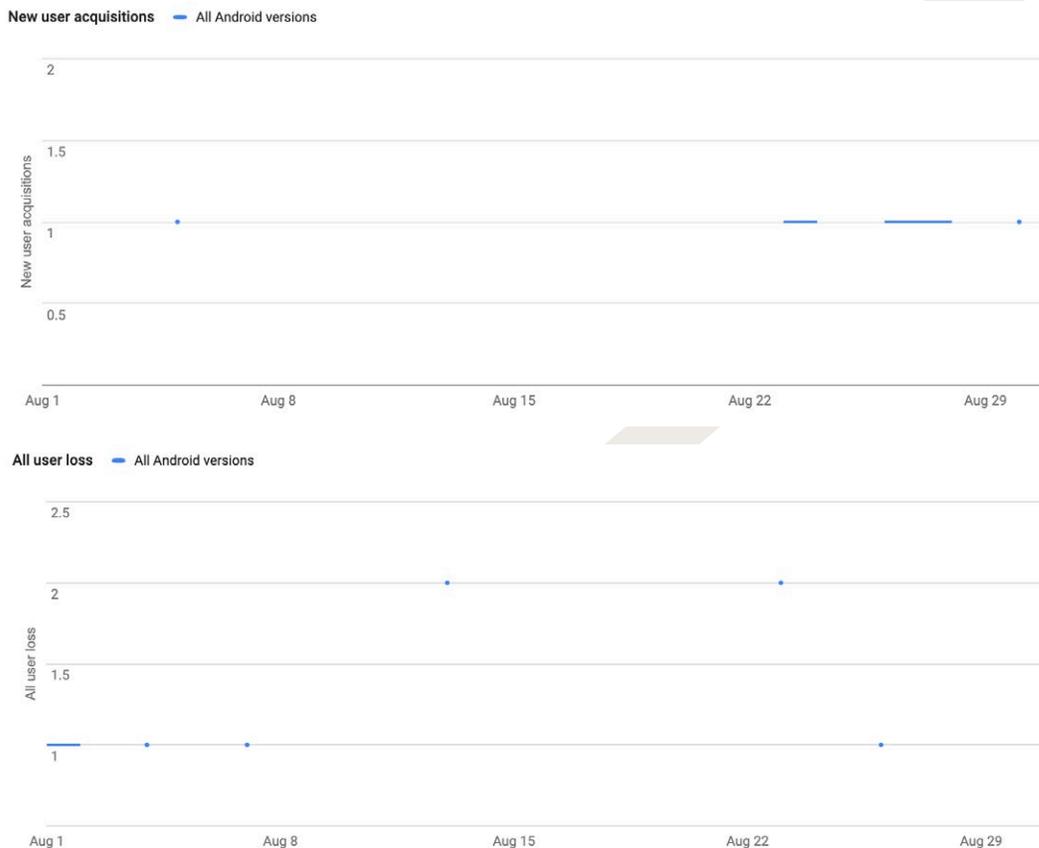
Uninstalls: 150



Last 30 days August 1st to August 31st

Installs: 7

Uninstalls: 11





iTunes Store

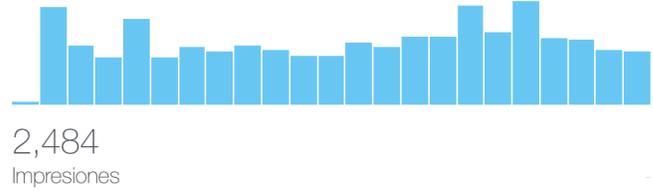
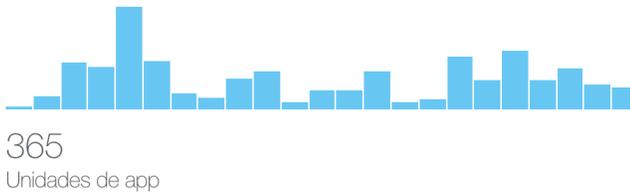
App Life Time Results

App Impressions on iTunes: 2,484
Installs: 365

Top Countries

United States: 210
México: 31
Argentina: 15
Canada: 15

Brazil: 10



Last 30 days August 1st to August 31st

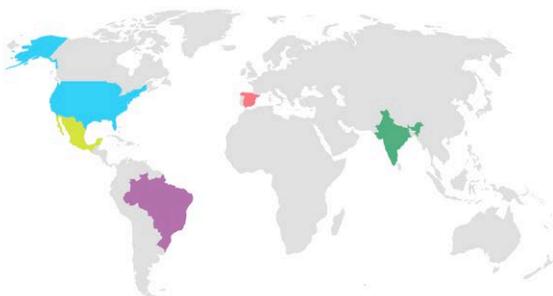
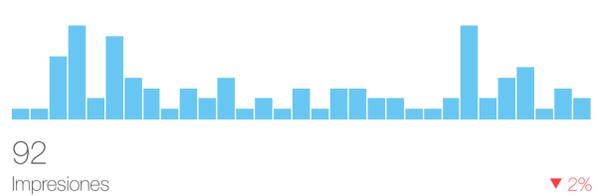
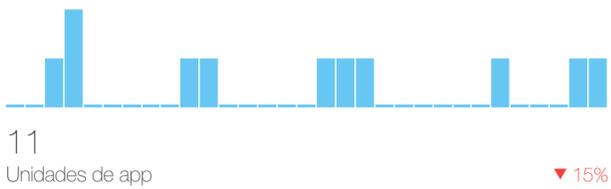
App Impressions on iTunes: 97
Installs: 11

Top Countries

United States: 6
Spain
México: 1

Brazil: 1

India: 1





Total Results (Android & IOS)

App Life Time Results

Installs: 561

Last 30 days August 1st to August 31st

Installs: 18

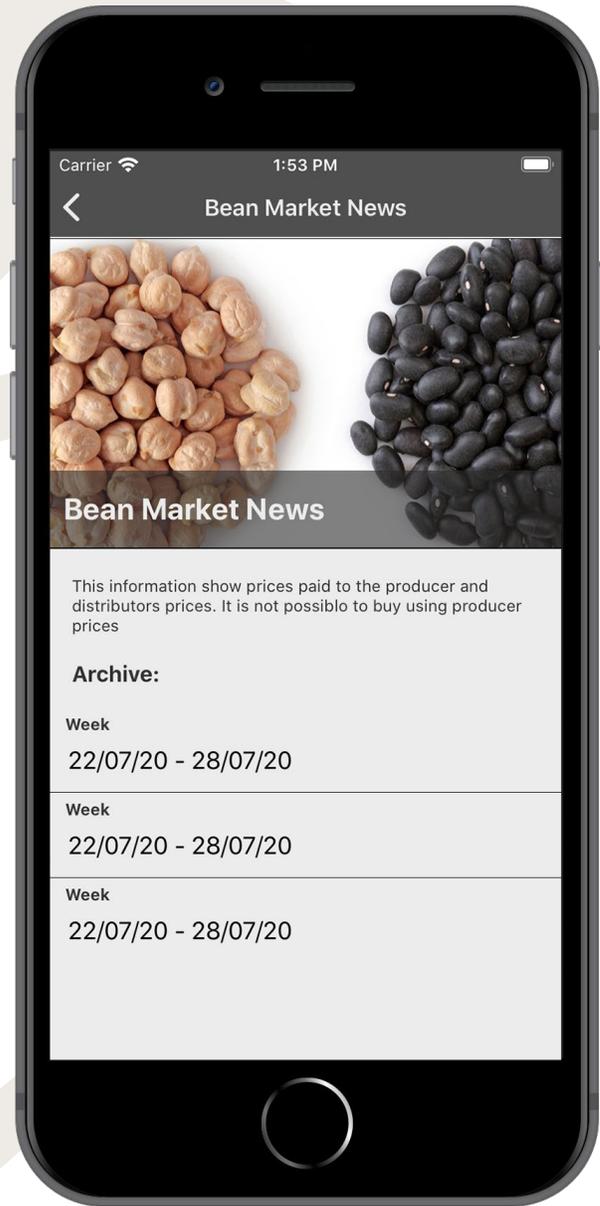
2020 August USDBC App News

This month we focused on the direct app code maintenance and upgrade, as we did on past months due to server code upgrades (server side code modifications that without the app would stopped function). Earlier the month of August we received a google communication that we need to upgrade the app code to an APK 29 (the app is currently running APK 28) no later than November 2; this upgrade is to ensure the proper app functionality on Android 10 and future versions. We also are working on improving some of the React Native (the Facebook React JS library in which the app is build) functions that were re-coded and soon will cease to exist and would cause problems to the app. All these actions are essentials for keeping the app running, without any of them, the app will simply stop working correctly.

We also add the section “Bean Market News” that will show the USDA report with the same name in a “historical way”. We will save the PDF report on the server and add an entry on the app data base so the new report will display and can be access from the new section, maintaining older reports as well. We also add the functionality for the app to display the representative photos on their section. This app update is not up yet, most of the code is ready and working, it just need more work to be uploaded to the platforms (Google Play and iTunne Store). This update will be available the first half of October.



App new Section and Functionality



Display information is for test purposes

App new Section and Functionality

