



**TRADE MISSION REPORT
ARGENTINA
MAY 18-22, 2015**



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U.S. Dry Bean Council Representative Randy Duckworth**

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Argentina Dry Bean Crop Update

Prepared by Randy Duckworth
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May 25, 2015

SUMMARY

Accompanying me on this trip to Argentina were bean experts Greg Ackerman and Mark Dombeck. Greg is a bean grower from Michigan and Mark is a bean grower from Minnesota. Between the two of them they have grown black beans, navy beans, LRK, DRK, cranberry, white kidney, and pintos. They were invaluable in providing estimates of bean yields.

In the past 6 years that I have traveled to northern Argentina in May/June time frame this is the best and by far biggest crop I have seen. If Argentina's dry bean crop were a beauty contestant I would rate the 2015 crop as a 9 on scale of 1-10. Overall, the fields we visited were very good and have strong potential. With exception of a couple fields almost every field we saw had good to very good pod set and foliage.

Most of the bean fields are still 2-4 weeks away from harvest and there is seed born disease pressure but so far the farmers largely seem to have it under control. The weather has been hot and humid in many areas and there is potential for problems with sclerotinia and bacterial blight (we saw both present in some fields). White flies infestations are also an issue in warm, humid weather.

Having said all that, unless Argentina experiences severe weather events over the next month (exceptionally cool humid weather or heavy rains) the crop is sufficiently far along that prospects are excellent. Argentina is likely to have a very good crop with high average yields, good quality and good size. With record plantings this year, high average yields will translate to historic exportable quantities for most bean classes.

2015 Crop Estimate and Total Marketable Supplies Estimate

Bean Type	Est. 2015 Planted Ha	Est. 2015 Yield/Ha (MT)	2015 Exportable Ha *Yield *.85	2014 Carryover MT	2015 Total Exportable MT
Black	190,000	1.7	274,550	50,000	324,550
Alubia	165,000	1.5	210,375	25,000	235,375
Crans	19,000	1.3	20,995	*	20,995
LRK	17,000	1.2	17,340	*	17,340
DRK	15,000	1.2	15,300	*	15,300
Total	406,000				613,560

* Unknown but very low carryover levels anticipated

Alubia Beans

The lowest estimate we had for an alubia field was 9 cwt per acre and highest was 32 cwt per acre. The 13 fields we stopped at averaged 125-150 acres. We also drove past a number of excellent fields that we were unable to stop at and/or access that appeared to be in generally excellent condition (virtually all farm fields in Argentina are fenced and set back from the road).

	Est. Yield/acre
Field 1	18 cwt
Field 2	19.5 cwt
Field 3	19.5 cwt
Field 4	26.5 cwt
Field 5	32 cwt
Field 6	27.5 cwt
Field 8	17.5 cwt
Field 9	9.5 cwt
Field 10	9 cwt
Field 11	4 cwt
Field 12	15 cwt
Field 13	15.5



Alubia Field



Alubias



Alubias



Alubias

Black Beans

Due to an unforeseen change in flights we were unable to see black bean fields in Tucuman region as we intended (Tucuman is largest black bean production area). Salta also produces significant quantities of black beans but as luck would have it we only ran across a couple fields in our travels. Nevertheless, we met with several regional processors/exporters (including largest black bean processor/exporter) who confirmed that Argentina's black bean crop is in very good condition and well above average in terms of expected yield. Largely based on information from the Argentine dry bean industry and observations of the overall crop conditions I estimate there will be an excellent yield (1.7 MT/Ha) and another 50,000 MT remaining from the 2014 crop year giving Argentina 324,550 MT of exportable black beans (nearly triple the historic average).

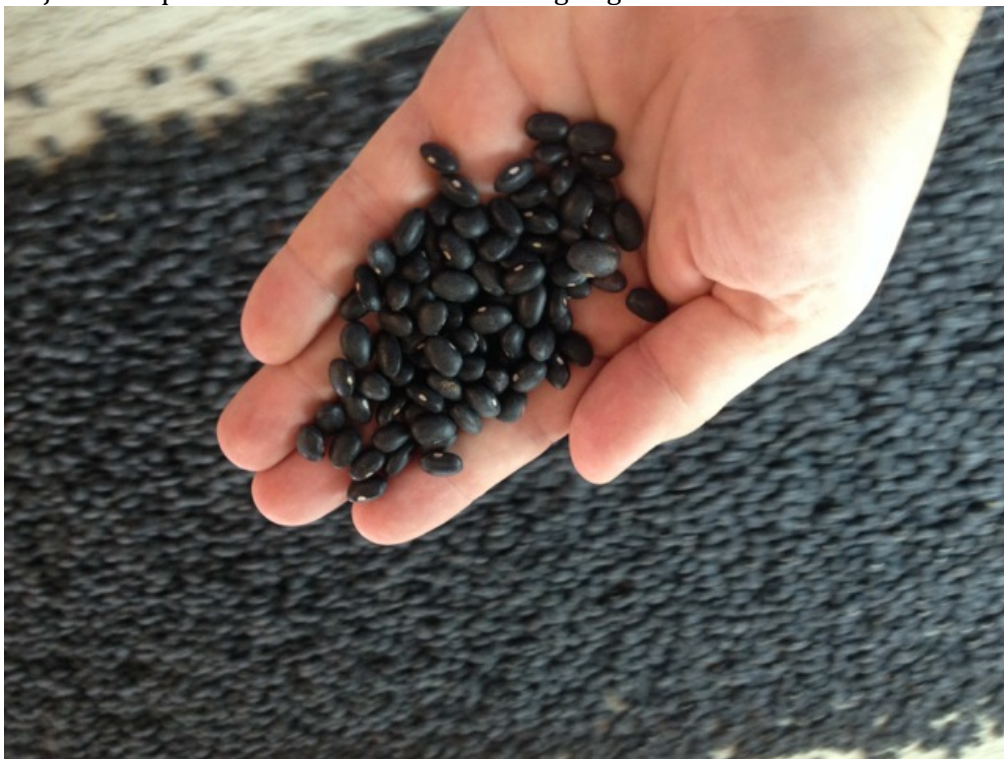
	Est. Yield/acre
Field 1	14 cwt
Field 2	18.5 cwt



Black Beans - Salta



Major black processor in Tucuman – looking at garbanzos and black beans



Color Beans (Cranberry, LRK, DRK, Canella)

Light Red Kidney

The light red kidney beans we saw appeared fairly typical for Argentina. They appeared to be developing good color but were smaller than U.S. light red kidney beans.



	Est. Yield/acre
Field 1	14 cwt
Field 2	18.5 cwt



Cranberry beans



	Est. Yield/acre
Field 1	10 cwt
Field 2	10 cwt
Field 3	18.5 cwt
Field 4	20 cwt



Dark Red Kidneys

The dark red kidney bean fields we saw were noticeably smaller than U.S. varieties and appeared a bit “veiny” – most likely the result of seed degeneration. We saw a field that had recently been harvested and a field where harvest was in progress. The first harvested field appeared to have good color as did the second. The second field had an estimated yield of 9 cwt.



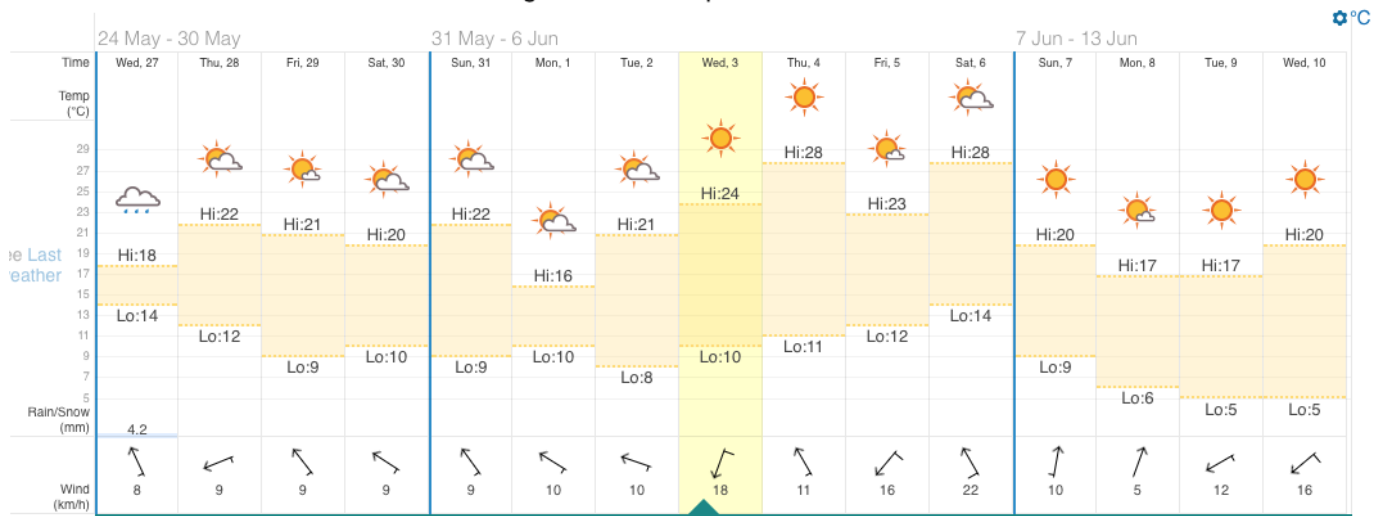


Temporary storage for DRKs

 °C

24 May - 30 May				31 May - 6 Jun				7 Jun - 13 Jun							
Time	Wed, 27	Thu, 28	Fri, 29	Sat, 30	Sun, 31	Mon, 1	Tue, 2	Wed, 3	Thu, 4	Fri, 5	Sat, 6	Sun, 7	Mon, 8	Tue, 9	Wed, 10
Temp (°C)															
30															
27															
24															
21															
18															
15															
12															
9															
6															
3															
Rain/Snow (mm)	6.8	1.3										1.3			
Wind (km/h)	7	8	8	8	8	12	10	7	10	7	13	15	2	9	10

Tucumán Extended Forecast with high and low temperatures



SEE NEXT PAGE FOR ARGENTINA EXPORT INFORMATION

Argentina Exports

In 2014/15 Argentina's export levels made a rebound from disastrous 2013/14 marketing year, which resulted from 2013 historic drought. In 2014 crop cycle Argentina had a very large exportable crop of exportable black beans but experienced very heavy rains for extended period during harvest time (particularly in Tucuman region). Argentina is thought to have had about 160,000 MT of exportable black beans of which 100,000 were good quality and 60,000 MT were of poorer quality (some industry members put the total even higher - in the 180,000 MT range). Based on export figures I estimate Argentina has 50-60,000 MT of mostly poorer quality black beans from 2014 crop and 25,000 MT of mostly lesser quality alubias.

