

2018 U.S. Dry Bean and Chickpea Planting and Production Estimates

August 2018

The Crop Production Report released by the U.S. Department of Agriculture (USDA) on August 10th includes average yield and production projections, as well as updated planted area estimates for several pulse crops, including dry edible beans and chickpeas. Further, it provides a planting breakdown by commercial class for dry

edible beans based on farmer surveys.

It is important to note that the USDA includes chickpea numbers as part of the overall dry bean number. In this report, we separate them out. Therefore, the reader should be aware that the dry bean numbers presented here do not include chickpeas.

> Dry Beans and Chickpeas, Planted Area (in hectares)

CROP	PLANTED AREA 2017	PLANTED AREA 2018 (estimated)	% CHANGE
Dry beans	596,190	499,510	-16%
Chickpeas, large	177,780	246,250	+39%
Chickpeas, small	72,640	85,470	+18%

Source: USDA Crop Production Report of August 10, 2018.

> Dry Beans and Chickpeas, Production (in MT)

CROP	YIELD 2017 (MT/ha)	YIELD 2018 (MT/ha) (estimated)	PRODUCTION 2017	PRODUCTION 2018 (estimated)
Dry beans	2.00	2.03	1,312,700	1,014,005*
Chickpeas, large (>7mm)	1.31	NR	224,300	NR
Chickpeas, small (<7mm)	1.26	NR	88,900	NR

NR: not reported.

* 2018 production calculated by multiplying estimated planted acres by estimated yield (499,510 x 2.03).

Source: USDA Crop Production Report of August 10, 2018.

> Highlights

Dry beans:

The USDA estimates year-on-year dry bean plantings are down 16%. Plantings are down for most bean classes, including the three major classes—pinto (-31%), black (-8%) and navy beans (-11%). A few bean classes, however, saw an increase in plantings, most notably dark red kidney beans (+20%), pink beans (+34%), small red beans (+82%), cranberry beans (+21%) and blackeye peas (+28%).

In terms of production, based on the USDA's estimated planted area and projected yields, we expect a dry bean crop of slightly more than 1 million MT, down 23% from last year. In North Dakota, the biggest dry bean producing state in the country, the crop is developing nicely on normal temperatures and good moisture. In Michigan, another major dry bean producing state, dry conditions predominated throughout July and slowed plant growth.

Chickpeas:

According to USDA estimates, year-on-year large chickpea (>7mm) plantings are up 39% and small chickpea (<7mm) plantings are up 18%. The increase in the chickpea area is primarily driven by growth in domestic consumption. In July, growing

conditions were challenging, with dry and warm weather reported in the Pacific Northwest, a major chickpea producing region, and in the state of Montana, which has seen a dramatic increase in chickpea plantings in recent years. Hail storms were reported in Montana, as well.

> Combined Dry Bean and Chickpea Production by State (in hectares and MT)

STATE	2017 PRODUCTION	2018 PRODUCTION (estimated)
California	47,400	48,988
Colorado	49,532	37,149
Idaho	130,317	145,830
Michigan	199,308	172,274
Minnesota	161,796	171,957
Montana	117,662	234,054
Nebraska	176,946	134,445
North Dakota	562,092	498,952
Texas	9,979	13,472
Washington	128,548	144,923

Source: USDA Crop Production Report of August 10, 2018.

> Dry Bean Planted Area by Commercial Class (in hectares)

COMMERCIAL CLASS	2017 PLANTINGS	2018 PLANTINGS (estimated)
Large lima	5,140	4,128
Baby lima	3,925	4,047
Navy	83,042	74,300
Great northern	25,657	21,125
Small white	3,076	2,388
Pinto	285,870	196,273
Light red kidney	16,147	15,378
Dark red kidney	21,408	25,698
Pink	6,030	8,053
Small red	8,417	15,338
Cranberry	4,694	5,666
Black	108,132	99,310
Blackeye	12,262	15,661
Chickpea, small (<7mm)	72,641	85,470
Chickpea, large (>7mm)	177,779	246,251
Other	12,383	12,141

Source: USDA Crop Production Report of August 10, 2018.

➤ **USDA Estimates Compared to Industry Estimates**

In July, we issued our previous newsletter titled USA Dry Bean Dealer Crop Estimates. That newsletter reported on figures presented by the six dry bean dealer associations at the U.S. Dry Bean Convention held in Bonita Springs, Florida, from July 21-24.

At the Convention, the industry estimated 2018 dry bean plantings at 480,864 hectares. The USDA's estimate (499,510 hectares) is 4% greater. Drilling down into the estimates by bean class, the USDA estimated more hectares than the industry did for all bean classes except navy and black beans. The USDA also estimate more hectares for both large and small chickpeas.

The table below juxtaposes the industry's estimates with those of the USDA for easy comparison.

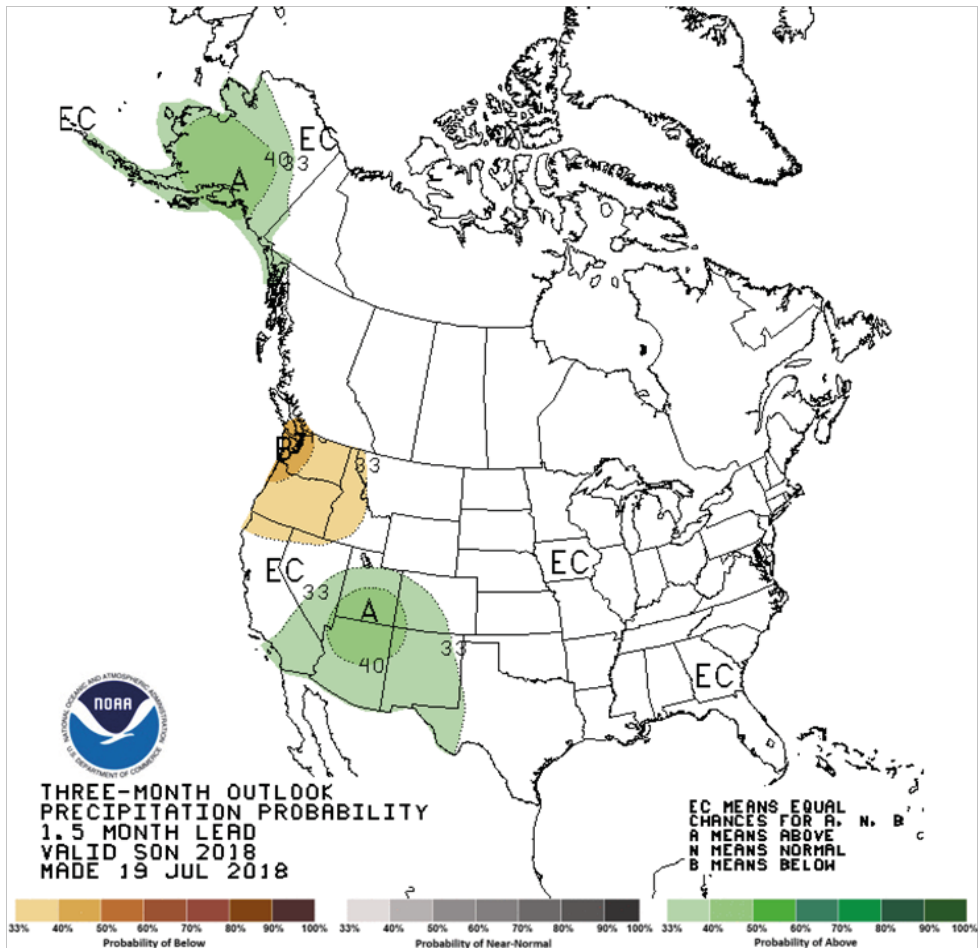
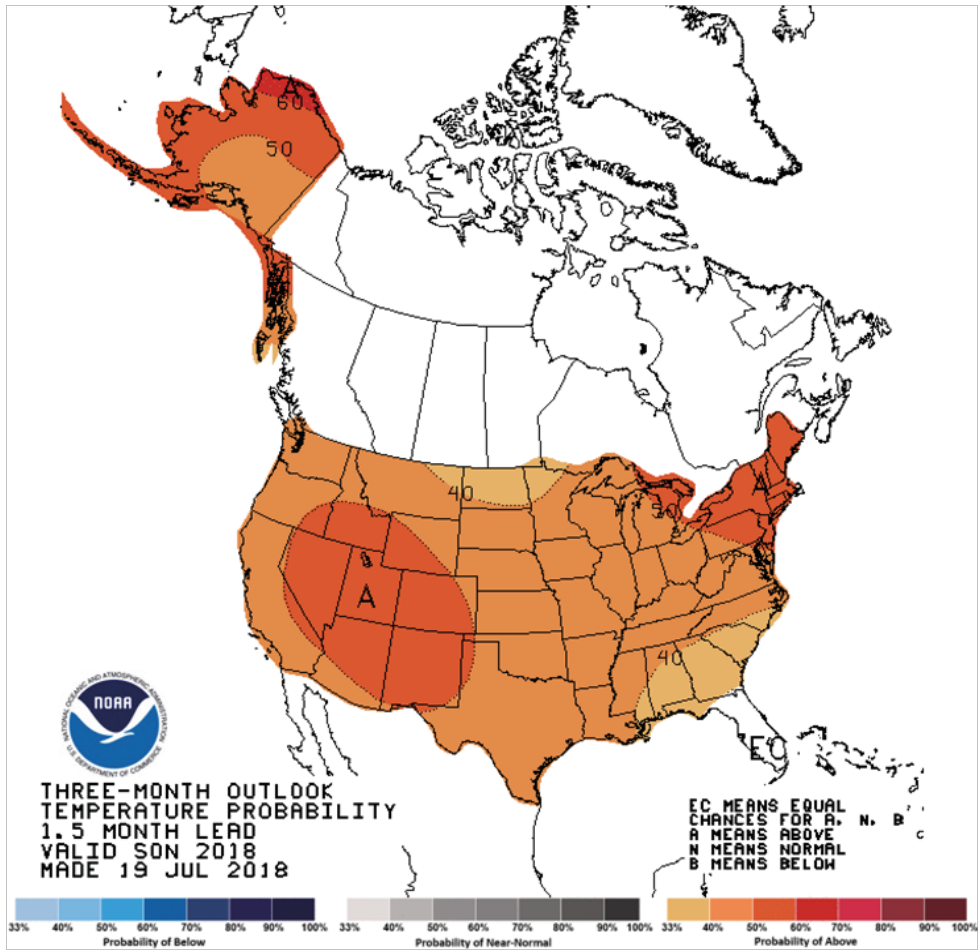
➤ **Industry and USDA 2018 Planted Area Estimates by Commercial Class (in hectares)**

COMMERCIAL CLASS	INDUSTRY	USDA
Large lima	3,658	4,128
Baby lima	3,923	4,047
Navy	82,501	74,300
Great northern	19,956	21,125
Small white	512	2,388
Pinto	185,567	196,273
Light red kidney	12,804	15,378
Dark red kidney	26,430	25,698
Pink	7,823	8,053
Small red	13,429	15,338
Cranberry	3,282	5,666
Black	102,494	99,310
Blackeye	4,482	15,661
Chickpea, small (<7mm)	75,069	85,470
Chickpea, large (>7mm)	194,047	246,251
Other	14,004	12,141

➤ **Weather Outlook**

The following are maps and paraphrased excerpts from the U.S. National Oceanic and Atmospheric Administration's (NOAA) long-range forecast, September to November:

Across the Great Plains, there are equal chances of below-, near- and above-average temperatures during the fall. Above-normal temperatures and below-average precipitation are likely across the Pacific Northwest. Weather conditions in the fall and winter indicate the likelihood of an El Niño event developing.



➤ **Mark Your Calendar**



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