

Colorado Bean News

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MEXICO BEAN STATUS

Excerpts from NDBC Rep. Raul Caballero of Mexico City; RMBDA Meeting on January 17, 1998 in Denver

The National Dry Bean Council and SAGAR (Mexico's version of our USDA) estimate that Mexico's dry bean production during the summer of 1997 was damaged by at least 50 % in the major bean states of Chihuahua, Durango and Zacatecas. A combination of drought and frost affected dry beans and other crops.

State	1996 Production	1997 Estimate	Change
Chihuahua	157,528 MT	112,541 MT	- 28.55 %
Durango	196,370 MT	58,766 MT	- 70.07 %
Zacatecas	390,000 MT	229,593 MT	- 41.13 %
TOTAL	743,898 MT	400,900 MT	- 46.58 %

Mexico's total domestic consumption is estimated at 1.46 million MT (MT = 2205 pounds) annually. Assuming there is approximately 40,000 MT carryover and that the 1997/98 winter crop optimistically yields 200,000 MT, Mexico will have enough supplies until May of 1998. The NAFTA Bean Quota currently will open the way for 57,963 MT early in 1998, and a second auction of around 100,000 MT probably by the middle of 1998.

INTERNATIONAL BEAN MARKET IS PROMISING

Excerpts from KBC Trading & Proc. Co. Rep. Paul Lambert of Stockton, CA; RMBDA Meeting on January 17, 1998 in Denver

The USA dry bean industry may experience a very strong year during 1998. Bean prices are increasing for all classes of dry edible beans, especially for black, great northern and pinto types. Due to a combination of low carryover and production problems during 1997/98 in many countries of Latin America, Africa and China, world supplies of dry beans are at all-time lows. Combine this situation with international marketing concerns about the 1998 bean crop potential in parts of the world where El Nino's influences (moisture extremes) could be significant.

The United States is the only major supplier of dry beans at this time, and should see strong prices and demand for its carryover beans. In addition, the outlook at this time is bright for production and prices for our 1998 crop.

Excerpts from Mr. Lambert's talk include, " Within recent memory, there has rarely been a better opportunity for our markets. We have never had a situation where Argentina, China and Chile are out of black beans, and at the same time Mexico, Brazil and Venezuela are huge buyers of black beans. There are practically no pinto beans, except in the USA, to supply the tremendous needs of Mexico, Angola and the Dominican Republic. Great Northern varieties worldwide are virtually non-existent. ... Conditions are almost perfect in the worldwide balance of supply and demand for beans to insure that our current USA production will most likely clean-up prior to new crop. ... further El Nino or other negative factors in foreign productions will also affect the plantings and prices of our 1998 crops."

MAILING LABEL UPDATE
Please send changes to:
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Fort Collins, CO 80523-1177



**Colorado Dry Bean
Administrative Committee
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The **Colorado Bean News** is supported in part by your voluntary check-off dollars administered by the **Colorado Dry Bean Administrative Committee** with headquarters at 1555 So. Havana Street - Suite 11-368, Aurora, CO 80012 (303-639-9600) (800-318-8049)

**Colorado Dry Bean Administrative Committee Update
CDBAC STRUCTURE**

Provided by Robert Schork, CDBAC Manager

The COLORADO DRY BEAN ADMINISTRATIVE COMMITTEE [C D B A C] serves as a function of Colorado State Government as the Board of Control for the "Marketing Order Regulating the Handling of Dry Edible Beans Grown in the State of Colorado", issued by the Commissioner of Agriculture of the State of Colorado, on July 1, 1988, and amended on September 1, 1988. The Committee has the authority to expend funds for research and education related to edible dry bean utilization as well as promotional efforts to create new or larger markets for edible dry beans produced in Colorado. Revenue is generated through assessments levied against bean producers (\$ 0.04/cwt) and bean handlers (\$ 0.02/cwt).

There are 9 directors that are elected from 3 districts as shown in the accompanying CDBAC map. Each district has two grower/producer directors and one dealer/handler director; and alternate representatives are sought for each director. Directors can serve two consecutive 3-year terms.

At this time, the Committee needs a new grower director in District 2 to replace Richard Folot who has served two terms. If anyone is interested in running for this position or has questions, please contact the CDBAC Manager, Bob Schork, at 800-318-8049. Also please feel free to contact the Colorado Department of Agriculture liaison for the CDBAC who is Helen Davis at 303-239-4121.

The CDBAC meets twice a year in Denver during the months of July and November to minimize conflicts with growers' busiest times. The meetings are typically held on Monday to accommodate those directors coming over from the West Slope. The CDBAC also convenes business via teleconference calls at least two other times during the year, or more often if needed.

CDBAC BUDGETS

The CDBAC's budget is based upon the amount of Colorado bean checkoff dollars generated by the voluntary program (\$ 0.04 - grower + \$ 0.02 - handler per cwt) that was implemented in 1988.

For 1998, the CDBAC has budgeted \$ 125,000 of which more than 70% goes to research, promotion and support of the National Dry Bean Council. For additional details on the NDBC activities which benefit Colorado, please refer to the NDBC articles in this issue of Colorado Bean News. The Spring 1998 Issue of CBN will feature highlights of the 1997 Research Projects funded by the CDBAC in addition to the 1998 Research Projects that will be conducted by Colorado State University personnel in cooperation with growers and dealers.

CDBAC IMPACTS

During 1997, the Colorado Dry Bean Administrative Committee supported a wide range of projects and activities that have benefited the Colorado dry bean growers and industry. Examples include the following:

- Quarterly Newsletter - COLORADO BEAN NEWS - published by the Colorado Bean Network and Colorado State University. The newsletter is distributed to 3800 individual readers, and an additional 600 copies are

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provided for secondary distribution by bean dealers and county extension offices.

- ACF Culinarians of Colorado Celebrity Culinary PRO/AM - raised money for charity and promoted new bean uses to the Colorado culinary industry.
- Chef Mentor program with Chef Robert Sherlock - raised money for culinary scholarships and promoted new bean uses in Colorado and surrounding states at culinary meetings, at a reception at the Governor's mansion, and in newspaper articles in the Denver Post. New recipes are: Bean Crepes Suzette and Pinto Bean/Roasted Eggplant Soup (see recipe section).
- In cooperation with the Colorado Department of Agriculture (Helen Davis) , published a promotional bookmark on beans entitled, "All About Beans".
- In cooperation with the Nebraska Dry Bean Commission and Colorado State University, provided production dollars required for the popular new regional bean publication entitled, "Dry Bean Production and IPM". Recently, CSU converted this publication for CD-ROM users.
- Sponsorship and/or participation via brochures, displays and personal representation of the Colorado dry bean industry at functions including the Greeley Farm Show, Colorado State Fair, Western Stock Show, Governor's Outlook Forum.
- Colorado checkoff dollars have been multiplied many times over for promotion and marketing goals by CDBAC membership within regional (Rocky Mountain Bean Dealers Association) and international (National Dry Bean Council) organizations which promote beans, cultivate existing and potential markets, and lobby government at the state and federal levels. Trade visits by these agencies to Mexico and other countries have opened new doors for Colorado-produced beans.

Colorado Checkoff Summary - CDBAC Report of 11/16/97

Market Class/Crop Year - CWT (\$ 0.04/cwt grower + \$ 0.02/cwt processor)

	PINTO	Lt Red Kid	OTHER*	TOTAL
1988	1,966,727	38,113	46,933	2,051,773
1989	2,524,825	72,934	32,643	2,630,402
1990	3,580,157	16,475	30,689	3,627,321
1991	2,491,694	41,874	21,316	2,554,884
1992	2,346,153	70,784	62,735	2,479,712
1993	2,384,591	63,776	40,513	2,609,000
1994	2,474,299	123,064	14,916	2,612,279
1995	2,157,648	232,610	59,333	2,449,589
1996	1,571,598	79,360	39,432	1,690,390
1997	333,286	23,249	779	357,314
TOTAL:	21,831,016	762,239	349,289	22,942,544

Total of great northern, navy, black, pink, Anasazi, small white and small reds Based on the \$ 0.04 + \$ 0.02 assessment on 22.9 million cwt since 1988. Colorado growers and handlers have invested nearly 1.4 million dollars in the future of their dry bean industry.

1997 & 1998 Budgets: 1997* Proposed 1998

Income:		
Assessments	156,670	125,000
Interest 1,995	2,000	
Expenses		
Promotional	5,368	7,500
Administrative	30,456	20,000
CSU Research & Education	58,550	49,000
Refunds 1,666	1,200	
Meetings/Travel	7,916	10,000
Legal/Audit 5,716	1,000	
Colo. Bean Newsletter	8,000	8,000
National Dry Bean Council	36,000	25,000
TOTAL Expenses	153,673	121,700
Prior Admin Refund	16,625	0
Current Year Surplus	4,992	5,300
Reserve (Money Mkt)	54,261	75,878
TOTAL Surplus	75,878	81,178

[Note: This budget statement covered August 1, 1996 to December 31, 1997; beginning in 1998, the budget year will cover January 1 to December 31]

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**Colorado Bean Network
EXECUTIVE BOARD**

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970-463-5468

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COLORADO BEAN NEWS is published quarterly by the Colorado Bean Network, a non-profit organization which supports the dry bean industry in Colorado. Address all editorial, advertising and mailing materials to: H.F. Schwartz, Dept of Bioag. Sci. & Pest Mgmt. Colorado State University, Fort Collins, CO 80523-1177, or call (970) 491-7846.

Advertising Material Deadlines and Rates for the Colorado Bean News

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Publication Material Due Dates:

Fall Issue	[Market Emphasis]	Sep. 7
Winter Issue	[Promotion, Nutrition Emphasis]	Dec. 7
Spring Issue	[Planting, Production Emphasis]	Apr. 7
Summer Issue	[Pest Mgmt., Harvest Emphasis]	June 7

Advertising Rates:

1/4 Page (3.5"x4.5")	B/W	\$100*
1/2 Page (7.0"x4.5")	B/W	\$180*
Full Page (7.0"x9.0")	B/W	\$350*
Back Page	B/W	\$400*
	Each Additional Color	\$75

Art Work Specifications:

*PMT's - 85 lines preferred
*Negatives to be stripped in 100 lines

Colorado Dry Bean Administrative Committee Supporters Qualify of Discounted Rates. Contact Editor for Details.

Terms of payment are U.S. Currency, Net in 30 days.

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**Colorado Bean Network Update
Colorado Bean Network Highlights**

The CBN meeting was called to order at 3:30 pm on January 27, 1998 at the Greeley Farm Show by Howard F. Schwartz. Those in attendance included: Howard Schwartz, Scott Nissen, Jerry Johnson, John Shanahan, Bob Hamblen, Jerry Alldredge, Harley Ross, Steve Krosky, Jim Fender, Rick Bogan, Randy Mathews, Darin Anderson, and Larry Proctor.

The first order of business was to elect officers for the Executive Committee on a 2-year appointment. The following slate of officers was proposed by H. F. Schwartz and unanimously approved by those present: Harley Ross from Kelley Bean Co. at Ovid as Chairman, Steve Krosky from Colorado Bean at Greeley as Treasurer, and Howard Schwartz from Colorado State University at Fort Collins as Secretary. John Shanhan (and wife Shelly) will continue to provide support to the CBN and Treasurer, and facilitate fiscal accounting activities in cooperation with H. F. Schwartz.

A review of the Transaction Report showed that most of the CBN expenses were associated with the layout, publication and distribution of the quarterly newsletter (\$ 2,500.00 per issue) to 3800 individuals + 500 bulk copies, with income generated primarily by the CDBAC sponsorship (\$ 2,000.00 per issue) and advertising revenue. Positive cash flows have been used in the past to provide grants (computer, printer, software, scanner, fax, etc) to H. F. Schwartz's program to support his role as secretary and complement other resources provided by Colorado State University in the preparation of the CBN Newsletter on behalf of the Colorado dry bean industry. In addition, CBN grants have historically supported other educational activities including Videotapes on annual CSU Variety Trial + RMBDA Mexico Trip Survey, annual CSU Variety Trial bulletins, field days, meeting expenses and other educational projects.

Jerry Johnson reviewed plans for field day visits to the CSU Variety Trials in eastern Colorado during mid-August (Burlington, Yuma, Brush, Eaton, ARDEC). Discussion centered around the value of industry-wide promotion of these 1998 events with sponsorship coordinated by the CBN, not individual bean elevators, on behalf of the Colorado bean industry, the CDBAC and CSU.

The Colorado Bean News format was discussed in some detail regarding the current format with white newsprint and relatively inexpensive layout to accommodate growers' interest that checkoff dollars are being invested prudently in research and promotion. Points to consider for the newsletter include:

- more coverage that clearly identifies CDBAC programs and support of the newsletter with bean checkoff contributions; this change is being implemented on Pages 2 and 3 which will highlight CDBAC activities.
- the CSU and CBN involvement with the newsletter will be separated from the CDBAC section to reduce confusion and provide a clearer perspective on the role of each on behalf of the dry bean industry and growers in Colorado.
- the newsletter could be 3-hole punched to encourage readers to save issues for future reference.
- an index could be provided on an annual or quarterly basis to facilitate access to previous articles.

- the latest issue should be made accessible via internet on our CSU website (VegNet).
- include a call for articles and topic suggestions; consider a section on interesting stories on bean farmers, practices, products, etc. that could be submitted by readers.
- develop a survey to readers and growers on the newsletter format, style and expense they prefer.

Schwartz informed the group that on January 20, 1998 he forwarded a letter on behalf of the Colorado dry bean industry to the Colorado Department of Agriculture to initiate the process of requesting that a Section 18 label application be submitted to the EPA for use of Tilt to control rust of dry beans east of the Rockies for 1998. A carbon copy was sent to the chemical company, Novartis, which will presumably support the request. If granted, Tilt will provide another tool to fight rust in addition to maneb and Bravo; sulfur is also labeled for bean rust, but has defoliated plants and provided poor disease control in CSU trials.

Bob Hamblen and John Shanahan informed the group that CSU will organize a Bean Crop Clinic on campus for 2-3 days during the first week of January, 1999; and would welcome a bean industry representative on the program planning committee which will meet periodically throughout 1998. As they become available, additional details will be shared with the bean industry to identify a volunteer.

Bean industry dealers shared their concerns about the importation of bin-run seed of the yellow bean market class known as Mayocoba directly from northern Mexico into western Kansas and a few fields in eastern Colorado during 1997 with apparent plans to repeat this process during 1998. They were concerned about the poor quality of some of this seed (containing dirt, pods, sticks, rocks, white mold sclerotia, weed seed) and potential seed-borne diseases (angular leaf spot, anthracnose, bean common mosaic virus, and bacterial brown spot, halo blight, common bacterial blight) that are endemic to Mexico and that could threaten productivity of this variety in addition to adjacent fields of commercial and certified beans like pintos, light red kidneys and great northrens that are being grown in our region. Their information and input from Schwartz has been shared with Colorado Dept. of Agriculture officials who will be looking into the situation for 1998 and requirements regarding phytosanitary and international movement of a seed product and/or soil into our state.

No date was set for the next meeting of the CBN, but interested dealers and growers may contact H. F. Schwartz for future notices of meetings (only 1 - 2 times annually).

CALENDAR NOTES

Two Great Agricultural Events:

The 1998 Governor's Agricultural Outlook Forum will feature the "Science, Ethics and Economics of Biotechnology in Agriculture" on February 18, 1998 from 7:30 am to 4:00 pm at the Adam's Mark Hotel in Denver, Colorado. Featured speakers include Robert Fraley (Monsanto), Charlotte Farin (North Carolina State University), Bernie Rollin (Colorado State University), Lowell Catlett (New Mexico State University), and Peter Scher (US Trade Representative). Call 1-800-886-7683 for more information on the Forum.

The Colorado Agriculture Hall of Fame Banquet will honor distinguished members of the agricultural community on February 18, 1998 from 6:00 pm to 9:00 pm at the Adam's Mark Hotel in Denver, Colorado. This unique event support leadership development programs of the Colorado FFA Foundation and the Colorado Agricultural Leadership Council, which are co-hosts for 1998. Call 719-275-0990 for more information on the Banquet.



WESTERN INTERNATIONAL GRAIN

DRY BEAN RECEIVING & PROCESSING

Burlington:	Mobile	(719)349-2326
		1-800-827-9559
Keenesburg:		(303)732-4241
Milliken:		1-800-635-2326

Colorado State University

COLORADO STATE UNIVERSITY

provides comprehensive support for production, pest management and processing of dry beans in Colorado.

Research Personnel:

Howard Schwartz	Plant Pathology
Mark McMillan	Plant Pathology
Mark Brick	Plant Breeding
Barry Ogg	Plant Breeding
Jerry Johnson	Variety Testing
Jim Hain	Variety Testing
John Shanahan	Agronomy
Jessica Davis	Agronomy
Scott Nissen	Weed Science
Frank Peairs	Entomology
Stan Pilcher	Entomology
Pat Kendall	Food Science & Nutrition
Joe Maga	Food Science & Nutrition
Frank Schweissing	Arkansas Valley
Mike Bartolo	Arkansas Valley
Abdel Berrada	Southwest
Mark Stack	Southwest
Calvin Pearson	West Slope
Fred Judson	West Slope

Extension Personnel:

Jerry Alldredge, Bruce Bosley, Randy Buhler, Wayne Cooley, Dan Fernandez, Bob Hamblen, Charles Hart, Bill Hancock, Ron Jepson, Gary Lancaster, Ron Meyer, Ken Smith, Brent Young, Jim Zizz

Websites of interest to bean growers

CSU VegNet

www.colostate.edu/Orgs/Vegnet

American Dry Bean Board

www.prairieweb.com/bean/bean_beans.htm

Nutrient Data Lab

www.nal.usda.gov/fnic/foodcomp

Ag Stats

www.usda.gov/nass/

Colorado Bean Company

www.info2000.net/~colobean/contus.htm

NDBC HIGHLIGHTS

Annual Meeting:

The National Dry Bean Council will hold its next annual meeting during February 7 to 10, 1998 in Washington where members from organizations such as the Colorado Dry Bean Administrative Committee will receive updates on NDBC programs from their Washington staff and selected overseas representatives, renew their contacts with USDA and other government officials, and host their Congressional delegations at receptions in the House and Senate.

National Promotion Discussion:

The dry bean industry (NDBC and American Dry Bean Board) will meet to discuss a possible mandatory national dry bean dealer/processor check-off program. All aspects of a proposed mandatory program, administered through the Agricultural Marketing Service (AMS) of the USDA, will be open for discussion at the upcoming meeting. The mission of this program is to increase by two pounds the per capita consumption of U. S. dry beans. This will increase annual demand of U. S. produced dry beans by 5 million hundredweight. This will be accomplished by promoting the nutritional value and the overall good food value to dry beans to consumers through a major advertising and promotion campaign.

Their goal is to raise more than \$ 3 million a year, and it is the intent of the proposal that the check-off fee be passed along to the market and end users. It is not intended that this assessment be charged back to producers. The cost of the check-off fee will not have a significant impact on retail prices.

A mandatory check-off must be voted on and approved by the dealers/processors subject to the check-off. It is the intent of this program that it will be national in scope in terms of the check-off, advertising and promotion to encompass the entire dry bean industry. Stay tuned for more information on the progress of these discussions.

EPA Pesticide Law Implementation:

NDBC is tracking implementation by the Environmental Protection Agency of a law which potentially affects pesticide use by dry bean producers. The Food Quality Protection Act calls for major changes in pesticide regulations, and includes new safety standards for all pesticide residues in food. EPA has categorized dry beans as a major crop, ag group which also includes, for example, wheat, corn, soybean, and rice.

If pesticide manufacturers are forced to cut back the availability of any of their products to meet EPA's tolerance levels, the manufacturers are likely to disallow use of their products by "minor crop" producers first, as these markets are less profitable to the manufacturers. Manufacturers will want to preserve the more lucrative "major crop" markets.

This is a complex law with no clear answers at this time about its impact on our industry. NDBC is monitoring EPA's action by itself, and through the Food Industry Environmental Forum, a coalition of food and agriculture trade groups in Washington, D. C., to which NDBC belongs.

NDBC from page 6

International Programs:

NDBC is conducting dry bean export promotion activities in six countries and four regions around the world this program year, which began July 1st. The program supports both traditional export markets, as well as new markets for U. S. beans, such as Brazil. It is funded at approximately \$ 826,000 by USDA through the Market Access Program and the Foreign Market Development Program.

Over 120 members of the U. S. and Mexican bean trade attended NDBC's first-ever International Bean Congress in Mexico City November 17. It was the first time so many members of the trade in both countries met. NDBC members made presentations on U. S. bean research and marketing, and U. S. Foreign Agricultural Service officials based in Mexico City spoke on U. S. government programs available to importers of U. S. beans.

NDBC raised the profile of the American dry bean industry and gathered more than 400 trade leads at the ANUGA Food Fair in Cologne, Germany, in October. Promoted as the "world's largest food show", ANUGA's exhibitors and visitors are drawn from the entire globe, not just Europe. This year, NDBC collected trade leads from Turkey, the Middle East, and North African markets, among others.



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DEMAND FOR U. S. DRY BEANS

Gary Lucier, Market and Trade Analysis Division,
Economic Research Service, USDA

Supply and Use Up in 1997/98

Total supply of all bean classes in calendar 1997 is estimated to have risen 4 percent to 4.3 billion pounds due to larger production and imports. Although bean supplies are up this season, supply is still 10 percent below the record high experienced in 1991. After accounting for export volume (expected to be up this year), estimated seed use, and inventory changes, the remainder represents domestic disappearance.

With prices increasing in 1996, domestic disappearance of dry edible beans fell slightly to 2.0 billion pounds. However, for 1997, lower average prices likely spurred increased domestic use and propelled total dry bean use close to 2.1 billion pounds—3 percent higher than the previous year.

Looking out to the year 2000, current trends suggest use will continue to move slowly upward. Why is use expected to continue rising? Well, to help answer that lets take a look at changes occurring in the U.S. population.

Hispanic Population Rising

The Hispanic market is important to several classes of colored beans. Although several other demand factors have been involved, increases in this segment of the U.S. population are closely correlated with growth in per capita use of bean classes like pinto and black.

The proportion of Hispanics in the U.S. population increased 53 percent during the 1980's and is expected to increase another one-third during the 1990's. Today, people of Hispanic origin account for 10 percent of the U.S. population—up from 6 percent in 1980. The Census Bureau estimates that by the year 2020, Hispanics could account for about 15 percent of the U.S. population. This may bode well for producers of colored beans, assuming of course that traditional diets continue to prevail in Hispanic families. It is unclear at this point how the inevitable increase in affluence over time within this group will affect their diets.

Long Run Trends In Per Capita Use

Dry bean use peaked in the United States during World War II at 11 pounds per person. Following the war, bean use began a long-term steady decline that finally bottomed out in the early 1980's. Per person use then began to rise as among several other things, an influx of immigrants from Hispanic countries brought their diets and eating habits with them. By the end of the 1980's, the upward trend in dry bean use was further solidified by the growing popularity of various ethnic foods and the increasing nutritional awareness of consumers.

Per capita use of dry beans likely increased in 1997 after declining in 1996. The three-year moving average of use

increased for the seventh consecutive year in 1996 but may decline slightly for 1997. Before 1997, the gains in average were getting progressively smaller each year. This indicates that domestic per capita use may be losing a little steam—perhaps reaching a temporary plateau of around 7.7 to 7.8 pounds.

Several factors could be at work here. One might be the extremely strong general economy with more affluent consumers switching to more costly sources of protein. Another factor could be a maturing Mexican/Southwestern food phenomenon since we also see a similar stabilizing trend in chile pepper use.

Despite these observations, current estimates suggest that per capita dry bean use will show an increase in 1997, moving back to around 7.8 pounds. The good news is that the industry is sitting on a solid foundation despite the inevitable year to year variations in use. The basic fundamentals of the market (population trends, health consciousness, low product cost) still suggest future increases in use are likely in the coming years.

Pinto Bean Use

Pinto beans account for the largest share of dry bean use—about 40 percent. Pintos have also been the fastest-growing class over the last 15 years. Pinto beans experienced the largest gain in use between the 1990-94 and the 1980-84 periods—moving up 28 percent from 2.5 to 3.2 pounds per person. Much of this gain occurred due to the growing popularity of ethnic (especially Mexican) cuisine and the increasing Hispanic population in the U.S. Recently, pinto bean use appears to have begun exhibiting signs of stabilizing at 3.4 to 3.5 pounds after peaking in 1992 and 1993. Per capita use of pinto beans is expected to remain in the 3.4-pound range in 1997.

Despite the recent pause in demand growth, if the trend of the past 10 years continues to apply in the late 1990's, pinto bean use could reach 3.8 pounds by the year 2000. Domestic utilization, currently around 910 million pounds, could exceed 1 billion pounds by the year 2000.

Great Northern Beans

Domestic use of Great Northern beans is remarkably stable. Average per capita use of Great Northerns has remained unchanged over the past 3 decades. Per capita use averaged 0.43 pounds in the 1970's, the 1980's, and the 1990's. In 1997, domestic utilization of Great Northerns is forecast to be 125 million pounds—the equivalent of 0.5 pounds per person and the same as a year ago. Given the stability in this market, it seems safe to predict that Great Northern bean average per capita use will remain close to 0.43 pounds per person through the year 2000.

Red Kidney Beans

The market for red kidney beans (dark and light reds) appears to be a mix between the stability of Great Northern beans and

the growth of the pinto market. Per capita use jumped in the 1990's for the same reasons as pintos with ethnic foods likely underpinning the market. Early in the 1990's, demand jumped 30 percent from the 1980's, but since then, kidney bean use has remained fairly stable.

In 1997, Americans are projected to consume about 150 million pounds of red kidneys—which is equal to 0.6 pounds per person—the same as 6 of the previous 7 years. This is well above the 1985-89 period when per capita use of red kidneys averaged 0.4 pounds. Again, the apparent stability of this market makes forecasting use to the year 2000 fairly simple with 0.6 pounds per person a good bet.

Navy (Pea) Beans

Similar to other white beans, per capita use of navy beans has not changed much over the past 17 years. Average use during the 1990's is 1.46 pounds per person—virtually the same as the average for the 1980's (1.47 pounds).

Although use was down sharply in 1996, navy bean use does appear to have rallied a bit in the 1990's after hitting a low in the late 1980's. In 1997, domestic navy bean utilization is forecast to rise to about 410 million pounds with use expected to hover around 400 million pounds through the year 2000. With prices down, per capita use is expected to total 1.6 pounds in 1997, up from the low of 1996 and just above the average for the decade.

See demand on page 10

Walton

The Farmer Oriented Company of Northeast Colorado

Receiving at Wiggins, Ft. Morgan, Hillrose

Processing at Wiggins: 970-483-7303

Marketing by Fitz Trading: 303-776-3460

Bean Seed • New Crop Contracts • Consulting

Gary Gahagen, Manager 970-483-7303

Jim Fitzgerald, Marketing 303-776-3460

demand from page 9

Lima Beans

Domestic utilization of combined baby and large limas is projected to total around 55 million pounds in 1997. This is 0.2 pounds per person, the same as the previous 6 years. Unlike most other dry bean classes, lima bean use appears to be on a long-run downward trend. Average per capita use during the 1990's is 23 percent below that of the 1980's and 30 percent lower than the 1970's. While the domestic market has been eroding, the export market has remained steady at 40 to 50 million pounds annually over the last 17 years. Despite steady exports, production has dropped about 12 percent in the 1990's from the previous decade.

Black Beans

Consumer interest in black beans has been a 1990's phenomenon. Per capita use has been trending upward throughout the decade and may have reached its highest point in 1996 at 0.5 pounds per capita (Figure 4). Until 7 or 8 years ago, black beans were grown mostly for export with very little consumed domestically. In fact, it was not until 1991 that estimated domestic utilization exceeded export volume for black beans. Although the market is still relatively small and easily over-supplied—as the industry experienced in 1996, rising use of black beans may be a reflection of the increased awareness of the nutritional aspects of dry beans, the popularity of various ethnic foods, and the growing Hispanic population.

With historically low prices last year, domestic utilization was estimated at a record 130 million pounds. Use may decline to 110 million pounds this year—reflecting the small 1996 crop and higher prices earlier in the year.

Other Classes

Market shares among the “other” or specialty bean classes in 1997 are not expected to change greatly from the previous year. In 1996, these classes accounted for 275 million pounds—around 1 pound per person. Use of blackeye and garbanzo beans—around 0.24 pounds per person—and followed closely by pink beans—will remain the top specialty bean classes. Cranberry beans, at 0.2 pounds, and small reds, at 0.14 pounds round out the top five specialty bean classes.

Retail Bean Sales Flat in 1996


According to data from Nielsen Marketing Research, super-market sales (at food stores with more than \$2 million in sales) of all dry beans and products totaled \$1.3 billion (Figure 5), unchanged from a year earlier. These data do not include foodservice or institutional sales. Nine of the 13 product categories identified in the data registered increased sales in 1996. Canned baked beans—with and without meat—is the largest category, accounting for \$441 million in sales, or 37 percent of the dry bean retail sales. However, baked bean sales value fell slightly and sales volume was down more than 2 percent. Dry bagged beans are the second largest category with \$166 million in sales. Although dry product volume was down, higher prices pushed value up 3 percent. Rounding out the top three was refried beans with \$143 million in sales—11 percent of the retail bean market. Volume and value of refried beans both declined 3 percent last year.

The largest percentage increases were for canned vegetarian beans which increased nearly 8 percent (\$29 mil), canned chili which rose 6 percent (\$62 mil), and canned ready to serve bean soups which also rose 6 percent (\$71 mil). Dry bean soup mixes (e.g. 15-bean soup) declined 15 percent to \$42 million.


Conclusion

In conclusion, although growth in average per capita use may have slowed the past few years, U.S. dry bean use remains strong by historical standards. Given population trends, the low cost of beans, and the healthful aspects of dry beans (e.g. fiber, folate, protein), the outlook over the next several years favors continued slow growth in domestic use. However, in order to continue expanding the domestic market and move closer to the world average per capita use of around 9 pounds, new promotions or the development of new products will be required to reach a broader segment of American consumers.

As of Jan. 1, 1998 . . .



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WORLD BEAN EXPORTS RISING

John Parker, Commodities Specialist, ERS, USDA Retired
Excerpts from MICHIGAN DRY BEAN DIGEST, Fall 1997 Issue

The following calculations were made from estimates and the Bureau of Census on the U. S. Market Share (%) for Dry Beans in Specified Countries from 1994 - 1997.

<u>Importer</u>	<u>1994</u>	<u>1995</u>	<u>1996</u>	<u>1997</u>
Algeria	9.8	27.1	2.9	13.6
Angola	32.0	44.9	23.5	37.7
Belgium	16.8	29.4	6.8	13.8
Brazil	1.7	1.9	0.9	1.7
Canada	40.1	52.0	52.7	56.3
Colombia	24.1	5.5	6.4	3.9
Cuba	0.0	0.0	0.0	0.0
Egypt	0.0	0.0	0.0	0.1
Ethiopia	11.1	4.6	7.5	10.0
France	18.3	24.6	25.8	30.7
Germany	3.9	11.5	15.9	16.7
Haiti	59.4	80.2	73.1	63.3
Hong Kong	1.3	4.4	4.5	8.2
India	0.2	0.0	0.0	0.1
Indonesia	0.0	0.1	0.0	0.3
Italy	6.0	5.3	5.6	7.5
Japan	9.7	13.3	11.9	13.1
Kenya	0.0	21.3	0.0	38.5
Malaysia	5.5	5.0	5.0	6.9
Mexico	63.7	39.9	92.7	88.5
Morocco	0.0	1.6	0.0	4.0
Mozambique	3.4	7.0	2.1	3.4
Netherlands	27.6	21.2	13.6	11.1
Other	2.8	5.0	4.7	13.3
Pakistan	0.0	0.0	0.0	0.3
Peru	32.2	36.1	0.4	7.1
Philippines	7.7	5.2	8.9	9.6
Portugal	8.7	9.6	8.4	8.9
Rwanda	38.2	23.5	27.4	14.0
Saudi Arabia	8.5	16.6	9.6	14.9
Singapore	0.7	1.0	1.3	6.4
South Africa	3.0	1.6	0.2	2.0
South Korea	4.6	4.6	2.6	5.0
Spain	3.4	3.0	3.2	5.6
Switzerland	3.5	2.3	2.8	3.8
Tanzania	26.5	22.7	0.0	16.7
Taiwan	0.9	0.8	0.9	1.5
Turkey	38.9	60.3	28.1	70.8
United Kingdom	51.1	57.4	60.7	61.3
Venezuela	8.1	10.8	2.6	5.6
Yemen	0.0	0.2	0.0	0.1
Yugoslavia	72.9	8.2	49.0	62.0
Zaire	6.7	94.5	0.0	45.5
TOTAL	10.9	12.1	13.4	15.3

DRY BEAN HARVEST STATISTICS

Excerpts from Colorado Agr. Statistics Service - January, 1998

<u>State</u>	<u>Production (000 cwt)</u>		
	1995	1996	1997
California	2740	2325	2970
Colorado	2558	2250	2280
Idaho	2160	1907	2215
Kansas	481	444	380
Michigan	6930	4640	5033
Minnesota	2055	2418	2403
Montana	205	235	257
Nebraska	3588	3705	3708
New Mexico	251	264	204
New York	538	377	617
North Dakota	7182	7524	6890
Oregon	208	158	224
Texas	225	84	143
Utah	32	10	39
Washington	902	710	850
Wisconsin	117	144	153
Wyoming	640	765	790
USA Totals	30812	27960	29156



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State	Yield (pounds/Acre)		
	1995	1996	1997
California	2000	1890	2250
Colorado	1550	1800	1900
Idaho	2000	2050	2150
Kansas	1550	1850	1900
Michigan	1800	1450	1650
Minnesota	1370	1560	1550
Montana	1900	2280	2200
Nebraska	1750	1900	2060
New Mexico	2010	2200	1700
New York	1630	1300	1560
North Dakota	1330	1320	1300
Oregon	2080	1800	2060
Texas	980	840	1020
Utah	460	1600	700
Washington	2200	2030	2240
Wisconsin	1300	1800	1800
Wyoming	2000	2250	2260
USA Average	1622	1595	1695

Market Class	USA Totals		
Large Lima	2080	1970	2410
Baby Lima	2320	2250	2540
Navy	1625	1481	1541
Great Northern	1765	1953	2095
Small White	1964	2055	2284
Pinto	1493	1559	1585
Light Red Kid	1705	1621	1870
Dark Red Kid	1443	1637	1591
Pink	1826	1731	1910
Small Red	2019	2005	2143
Cranberry	1701	1612	1648
Black	1837	1596	1642
Blackeye	2035	1942	1995
Garbanzo	1654	1279	1561
Other	1334	1419	1599

State	Area Planted (000 acres)		
	1995	1996	1997
California	145.0	128.0	135.0
Colorado	190.0	145.0	135.0
Idaho	110.0	95.0	105.0
Kansas	34.0	28.0	22.0
Michigan	390.0	340.0	315.0
Minnesota	190.0	160.0	170.0
Montana	11.0	10.5	12.2
Nebraska	225.0	205.0	190.0
New Mexico	12.5	12.0	12.0
New York	34.0	30.0	40.0
North Dakota	600.0	580.0	600.0
Oregon	10.2	9.2	11.0
Texas	25.0	13.0	15.0
Utah	7.3	5.0	5.8
Washington	41.0	37.0	38.0
Wisconsin	9.3	8.3	8.8
Wyoming	35.0	37.0	37.0
USA Totals	2069.3	1843.0	1851.8

Market Class	USA Totals		
	1995	1996	1997
Large Lima	21.0	21.0	30.0
Baby Lima	23.0	24.0	37.0
Navy	487.1	419.2	381.5
Great Northern	138.4	121.8	111.5
Small White	8.3	5.6	8.2
Pinto	843.0	824.7	762.2
Light Red Kid	83.9	68.1	86.8
Dark Red Kid	73.4	68.3	65.1
Pink	38.4	30.9	38.7
Small Red	37.2	20.7	43.4
Cranberry	35.0	33.4	41.7
Black	130.9	88.1	132.9
Blackeye	55.6	32.2	42.0
Garbanzo	30.6	42.7	24.7
Other	63.5	42.3	46.1

Market Class	USA Totals			Top 3 States		
Large Lima	415	394	698	CA		
Baby Lima	510	517	914	CA		
Navy	7319	6001	5487	MI	ND	MN
Great No.	2176	2252	2267	NE	ID	WY
Small White	163	113	185	ID	WA	OR
Pinto	11349	12162	10827	ND	CO	NE
Light Red Kid	1316	1039	1569	NY	NE	CO
Dark Red Kid	925	1056	972	MN	WI	MI
Pink	652	528	699	ID	MN	ND
Small Red	745	405	900	ID	WA	MI
Cranberry	575	503	661	MI	CA	MN
Black	2305	1350	2100	MI	ND	NY
Blackeye	1091	567	802	CA	TX	
Garbanzo	473	504	381	CA	ID	WA
Other	798	569	694	MI	CA	ND

SEED QUALITY & SEED-BORNE DISEASES

by Howard F. Schwartz, Colorado State University
 Excerpts from Seed Quality chapter by J. Stanelle and R. Hall
 DRY BEAN PRODUCTION AND PEST MANAGEMENT Reg. Bull. 562A

Seed certification programs such as those implemented in western states like Colorado, Wyoming and Idaho ensure that quality seed supplies are available to crop producers. The primary emphasis of seed certification is maintenance and identity of genetic purity in crop varieties. Land used for production of all classes of Certified seed must meet specific requirements with respect to cropping history and isolation. The process of determining whether a seed crop merits certification, involves precise record keeping, field inspection(s), proper seed conditioning, laboratory tests to assess germination and purity, and proper labeling of the seed container.

Field Inspection

Trained representatives of state certification agencies inspect bean seed fields for genetic purity of the variety, and the presence of objectionable weeds or seed borne diseases which may include: (I) Anthracnose and Angular

See seed quality on page 13

DAVE NULAND HONORED

Excerpts from THE BEAN BAG, Winter 1997 Issue

David Nuland was the recipient of the 1997 Bean Improvement Cooperative Meritorious Service Award (a career award), based on his long time bean research, extension, and service contributions to the bean industry. The award was presented by Howard Schwartz (BIC President) during the meeting of the BIC held at Annapolis, MD in November.

David is a Dry Bean Extension Specialist at the University of Nebraska Panhandle Research and Extension Center at Scottsbluff, NE. David is an enthusiastic variety evaluator with the producer's interest at heart. He combines the Cooperative Dry Bean Nursery and all commercial pintos and great northern into trials where new bred materials are evaluated side-by-side with the tried and true varieties. He has successfully molded a working relationship between industry, producers and County Educators resulting in on-farm research in western Nebraska.

His leadership in the are of on-farm research and the statistical analysis 'probability of exceeding the mean' is recognized

nationally. Major areas of research have been compaction, nitrogen use, nitrogen fixation, response to hail injury, variety response to iron stress, and variety development of great northern and pinto germplasm. Inferences from these trials are applicable to the entire dry bean production area of Nebraska and are shared with producers through THE BEAN BAG.

VARIETY TRIAL RESULTS - 1997

By David Nuland and Bob Hawley
Excerpts from THE BEAN BAG, Winter 1997 Issue

The following variety trial excerpts were taken from a study conducted at Scottsbluff, NE. Late-season rust infection developed but plots were not protected with a fungicide. This trial was funded in part by the Nebraska Dry Bean Commission.

Variety	Yield (lb/A)	Seed (#/lb)	Flower(days)	Maturity (days)
Vision	2885	1265	37	94
Maverick	2750	1225	37	87
GTS - 900	2700	1105	41	88
Winchester	2670	1210	38	84
CO 51715	2655	1215	37	82
ROG 179	2600	1180	37	86
Frontier	2565	1155	40	91
Bill Z	2560	1270	36	87
CO 51713	2545	1270	37	84
Burke	2520	1175	36	84
Othello	2460	1280	36	81
93 - 220	2425	1215	36	79
Bucks skin	2385	1185	35	82
UI 126	2340	1255	38	85
Arapaho	2330	1235	37	86
Chase	2305	1315	41	88
Topaz	2300	1190	36	76
Elizabeth	2190	1225	37	80
Apache	2115	1225	36	80

seed quality from page 12

Leaf Spot fungi borne within and on seed, White Mold sclerotia physically borne within improperly conditioned seed; (II) Halo Blight, Bacterial Brown Spot, Common Bacterial Blight, Bacterial Wilt bacteria borne within and on seed; and (III) Bean Common Mosaic virus particles borne within seed. Two inspections are normally conducted, once during the post-flowering period and once at preharvest in the windrow. Seed fields are rejected if they fail to meet strict tolerance levels stated in the certification standards of each state.

[Note: Most of these diseases are either not prevalent or do not exist in certified seed production areas in western Colorado and other western states. Bin-run seed from eastern regions and countries like Mexico, where these

CSGA
1/4 page
Green

seed quality from page 13

seed-borne diseases are more prevalent, may be contaminated and pose a threat to other fields of commercial beans planted from certified seed.]

Seed Conditioning

Seed conditioning is the process of cleaning, treating and packaging seed stocks. Conditioning enhances seed quality by removing foreign matter, small seeds, weed seeds or other crop seeds. Certified seed can only be conditioned at an approved seed conditioning facility which assures seed purity. Approved conditioners must ensure that all conditioning equipment and storage facilities are cleaned and accurate records are kept. Operators of conditioning equipment are encouraged to attend seed conditioning clinics to keep abreast with the latest technology.

Laboratory Testing

All certified seed must undergo laboratory tests to assess seed quality. Seed testing is conducted in accordance with rules established by the Association of Official Seed Analysts. These rules specify exact procedures that analysts must follow to insure the accuracy and repeatability of the tests. The most common laboratory tests include: seed viability, seed purity and noxious weed content. Additional laboratory tests can be conducted to verify if seed is contaminated or infested with suspected seed borne pathogens.

Components of Seed Quality

Seed germination is the most well recognized aspect of seed quality. Germination tests indicates the portion of the seed lot that is capable of producing healthy seedlings. Seed dormancy, a mechanical component that delays germination until environmental conditions are favorable for growth, is also important. Seed tests normally list

germination percentage, dormancy percentage, and the sum of the two as total viability. High quality bean seed should have germination levels above 85% and relatively low dormancy.

Mechanical purity refers to the amount of material in the seed other than viable seeds of the crop shown on the label. The material may be composed of other crop seeds, weed seeds, broken seeds of the labeled species that are less than one-half the seed size, or any inert matter. Low levels of mechanical purity are desirable. Varietal or genetic purity refers to the purity of the seed lot with respect to the variety name printed on the Certified seed tag. Certification programs rely heavily on field inspection for ensure that varietal identity is maintained throughout the Certified seed production and distribution process.

Phytopathology quality, or absence of infectious pathogens should be an important consideration when purchasing bean seed. Certified seed is field inspected to detect the presence of seed borne pathogens. Field inspections and laboratory tests performed on the seed provide assurances to the buyer that seed has met the standards for seed borne pathogens.

[Remember that Certified Seed from Colorado and other western states is a valuable investment in the successful and economical production of your bean crop. Planting bin-run and non-certified seed increases your chances of earlier-season disease pressure, actually increases pest management costs, may significantly reduce your productivity and net return that season, and may jeopardize future crops by contamination of your fields from new and/or higher populations of pests, including plant pathogens, weeds and insects.]

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- Severance, CO970-686-2678
- Sterling, CO970-522-3595
- Wheatland, WY307-322-2550

KNOW PLANT VARIETY PROTECTION RULES

By James Swenson, Regulatory Supervisory, North Dakota State Seed Dept.
Reprinted from NORTHARVEST BEAN GROWER, January 1998

One of the more significant provisions of the 1994 amendments of the Plant Variety Protection Act (PVPA) was to eliminate the right to sell any portion of the "saved seed". Producers who want access to new varieties have to initially purchase a protected variety as "legal" or "authorized" seed. For the majority of the seed grown in North Dakota [and Colorado], this would mean that the initial purchase of a protected variety would have to be as a class of certified seed. Once a producer has obtained a new variety by authorized means, he can save that production for his own use for an indeterminate period of time. Producers can no longer wait for their neighbor to grow a new seed variety and then obtain their seed supply of a new variety as common seed.

Another significant change is the liability that exists for conditioners. If the conditioner has knowledge that the grower is conditioning excess saved seed and may be intending to sell some of that seed, the conditioner may also be liable for a violation of PVP rules.

[For more information on PVP implications to the dry bean industry in Colorado, please feel call any of the Colorado State University bean specialists]

WHERE DO WEEDS COME FROM?

By Robert Wilson, Weed Control Specialist, Univ. of Nebraska at Scottsbluff
Excerpts from NORTHARVEST BEAN GROWER, January 1998

In a study in western Nebraska, an average cropland soil contained 114 seeds per pound of surface soil. On a per acre basis, the seed content approached 200 million seeds.

Nineteen different species were found within the weed seed generally fitting one of three groups. Group I consisted of redroot pigweed and common lambsquarter and accounted for 86 % of the seed found. Group II accounted for 13 % of the seed and was primarily barnyardgrass, yellow foxtail, hairy nightshade and common purslane. Group III was composed of the remaining 13 species and accounted for 1 % of the seed found.

During any one year, only about 3 % of the common lambsquarter and redroot pigweed seed present in the soil germinate. The rest remain dormant to ensure that the species can perpetuate itself. Average emergence

percentages for other common weeds are as follows: kochia - 25 %, hairy nightshade - 5 %, common sunflower - 5 %, yellow foxtain - 3 %, and wild proso millet - 7 %.

Each year, weed seeds are added to the soil as plants mature and drop the seeds on the soil surface. A single pigweed or common lambsquarter can produce more than 70,000 seeds per plant while a single hairy nightshade plant can produce 90,000 seeds. Weeds can also enter a field from outside sources, with the primary seed dispersal methods being wind, irrigation water, animals and man.



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CSU 1997 BEAN VARIETY TRIAL SUMMARY

For a more complete report of the 1997 variety tests, contact Dr. Jerry Johnson, Dept. of Soil & Crop Sciences
Colorado State University, Fort Collins, CO 80523 (tele: 970-491-1454).

ENTRY	Rocky Ford	Holyoke	Merino	Ave. of Holyoke + Merino:	
				(cwt/A)	(seed/lb)
CO 51715	2891 cwt/A	2719	2941	2830	1236
CO 51713	2805	2695	2839	2767	1227
96YT117	-	2643	2825	2734	1224
96YT116	-	2629	2794	2712	1260
Othello	2244	2609	2482	2546	1320
ROG 179	-	2566	2618	2592	1203
Chase	2598	2506	3024	2765	1242
96YT115	-	2407	2765	2586	1212
Bill Z	2708	2332	2533	2433	1337
USWA19(Burke)	-	2298	2781	2540	1237
Buckskin	-	2277	2577	2427	1279
ROG 117	-	2241	2608	2425	1295
Elizabeth	-	2199	2534	2367	1187
ROG 261	-	2198	2786	2492	1278
Apache	2327	2157	2779	2468	1196
Maverick	2149	2047	2401	2224	1270
ROG 299	-	1884	2199	2042	1238
Vision	2393	1843	1778	1811	1312
93-220	-	1790	2882	2336	1184
GTS-900	-	1755	2108	1932	1325
Average	2461	2290	2613	2452	1253

* Severe storm damage occurred at the Ovid site 3 weeks before harvest; data not included.

[We gratefully acknowledge the time and energy provided by the following cooperators for these on-farm trials and field day visits sponsored in part by the CDBAC: HOLYOKE - Jim Hendrix, Jerry Haynes - Jacks Bean Co., Jim Zizz - Yuma County Coop. Extension; OVID - Joe Shank Jr., Jim Fender - Kelley Bean Co., Gary Lancaster - Sedgwick County Coop. Extension; MERINO - Howard Hettinger, Bill Newth - Trinidad/Benham, Randy Buhler - Logan County Coop. Extension; ROCKY FORD - Frank Schweissing]

PostScript Picture
(isb.ai)