

COMENUEZ

August 25, 2021.

Our regards to every one interested in the Pecan Industry

Since 2017, COMENUEZ has released the Pecan Crop estimate for Mexico. It is an important information for the Market to have timely information on Volume and Quality of Mexican Pecans that may be able to market.

This Forecast is elaborated with formal data provided by AG professionals from regional State agencies that do regular inspections on several important pecan growing areas. In addition we had personal and remote interviews with growers, independent advisors and Industry members to validate information.

A special recognition to everyone that participated with their knowledge and gave us their time so we could complete this report. A special thank you for all the Ag Advisors that are actively working to better all Pecans Orchards. This improvement is clearly evident in all Growing Regions.

We are convinced that for coming years we need to improve our procedures to have solid data we can verify so we do not only work with forecasts. Up to this day it seems that our best option would be with the expeditions of certificates of Origin to market Crops.

For the 2021-22 Pecan Season we expect for México to have a crop of 254 Million Pounds of Inshell Pecans. This means a decrease of 48 million pounds from last year 2020, a 16% decrease.

As relevant data to this number, the Production coming from Chihuahua has a reduction of 25% with a total crop of 151 million pounds and Sonora with a reduction of 12% with a total crop of 33 million pounds.

This reduction for Chihuahua can be explained due to high heat stress on trees during the unusual hot Fall in 2020 with a relative big nut set. This triggered problems with low quality kernels in different areas and early frost damage in the Northwest area of the state that caused many stick-tights.

The State Central Growing area of Delicias, Saucillo and neighbor counties, that are irrigated the Conchos river reservoir are coming from a disappointing high crop low quality year which caused alternate bearing. Some growers that do not have enough wells to irrigate have lack of water due to low allotment from de irrigation district.

In Camargo and La Cruz counties several areas were damaged by hail storms.

In the irrigated areas of Jimenez, Allende y Lopez we orchards in varied conditions that in general gives us a moderate reduction in crop with alternate bearing in old trees and sustained crop in well managed young/mature trees.

In Chihuahua county, Aldama, El Sauz and Ahumada we have new plantations that increase their production every year.

In the whole state we have had abundant and timely rains that combined with the moderate crop makes us optimistic to expect good quality pecans for Chihuahua in 2021.

For the state of Sonora the High temperature stress on trees during 2020 led to a low root carbohydrate reserve for 2021 and a reduction in potential crop in mature orchards. For young trees there is a better crop expectation.

These reductions in Chihuahua and Sonora are happening even with the incorporation of new plantings coming into production when the market was expecting a faster rate of increase in the overall supply of Pecans.

For Coahuila specially in the northern area where most of the volume is grown we have had favorable climate conditions and with the improvement in orchard management and new planting we are expecting 37 million pounds for the whole state. Timely rains in the north, Laguna and Parras make for good quality forecast on Kernels.

For Durango we have had favorable growing conditions with timely rains and we expect 15 million pounds.

In Nuevo Leon we have a small reduction to 5.8 million pounds and for the rest of the growing areas we expect a crop of 11.6 million pounds.

It is important to mention that this document is released in the last week of August 2021 and there is some time left on the growing season. The trees all around health at the end of fall and the quality of our crop will give us some light on what to expect for 2022.

The Water Crisis due to extended drought in Northern Mexico and US South West is still present. Even with this summer abundant rains that might extend through early October in Northern Mexico, water shortage is a serious threat for future growth on Pecan Production.



STATE	2015 PRODUCTION SADER	2016 PRODUCTION SADER	2017 PRODUCTION FORECAST COMENUEZ	2018 PRODUCTION FORECAST COMENUEZ	2019 PRODUCTION FORECAST COMENUEZ	2020 PRODUCTION FORECAST COMENUEZ	2021 PRODUCTION FORECAST COMENUEZ	PERCENTAGE OF CHANGE
CHIHUAHUA	79,934	92,500	77,500	92,233	84,854	90,794	68,500	-25%
SONORA	15,028	17,500	13,000	15,627	20,000	17,000	15,000	-12%
COAHUILA	12,509	14,600	10,700	18,160	11,804	15,109	16,800	11%
DURANGO	7,143	8,140	6,100	7,000	5,600	6,100	7,000	15%
NUEVO LEÓN	3,353	3,500	2,750	3,500	2,800	3,150	2,650	-16%
OTHERS	4,748	5,900	4,700	5,200	4,680	5,100	5,300	4%
<b>TOTAL (tons)</b>	<b>122,714</b>	<b>142,140</b>	<b>114,750</b>	<b>141,720</b>	<b>129,738</b>	<b>137,253</b>	<b>115,250</b>	<b>-16%</b>
<b>TOTAL (m pounds)</b>	<b>270,534</b>	<b>313,360</b>	<b>252,976</b>	<b>312,434</b>	<b>286,019</b>	<b>302,585</b>	<b>254,078</b>	

SOURCE:

SIAP (Agrifood and Fisheries Information Service) / SADER (Ministry of Agriculture)  
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