

INSIDE THIS ISSUE

- DRY BEAN CROP UPDATE.. 1, 4-5
- MONTANA TRADE MISSION.. 2-3
- USDA FOOD ASSISTANCE 5
- RESEARCH PROPOSALS 5
- PULSE INDUSTRY HIGHLIGHT... 6
- FRIDAY FUNNY / EVENTS..... 6



Dry bean plants on Cordell Huebsch's farm near New York Mills, Minnesota, show the effects of summer heat ahead of harvest. Huebsch (above) said what initially looked like a bumper crop developed smaller pods and beans, leaving him expecting a mediocre harvest despite irrigation. Photos: Agweek TV.

SMALLER DRY BEAN CROP SENDS PRICES SHARPLY HIGHER REDUCED ACREAGE, SUMMER DROUGHT AND TIGHTER-THAN-EXPECTED SUPPLIES ARE ALREADY TURNING ATTENTION TOWARD 2027.

With an estimated two-thirds of the U.S. dry bean harvest complete, USDA's latest production forecast points to a significantly smaller crop in 2026. But the real story is what that smaller crop is doing to the market.

In its October Crop Production report, USDA projected dry bean production in seven reporting states at 21.6 million hundredweight, nearly 20% below last year. Harvested acreage is forecast to decline 16.5%, while the average yield is expected to fall to 1,935 pounds per acre.

Mitch Coulter, executive director of Northarvest Bean Growers Association, said the decline in acreage began well before this summer's drought.

Coulter said tariffs disrupted export markets, while changes to federal food aid and USDA purchasing programs reduced demand for dry beans. "Dry bean prices bottomed out in the major conventional bean classes which left little appetite for farmers to grow the crop," Coulter said.

Now, the smaller harvest has pushed prices sharply higher, particularly for black and pinto beans.

According to Dylan Karley, general manager of North Central Commodities in Johnstown, North Dakota, grower prices for black and pinto beans have climbed from \$20-\$22 per hundredweight at the end of last year's harvest to approximately \$40-\$45 today.

"It's been a bit of a roller coaster, that is for sure," Karley said.

A Difficult Growing Season

The acreage reduction was only the beginning. Then came the summer heat.

North Dakota, the nation's largest dry bean-producing state, accounts for much of the production decline. USDA forecasts production at 6.23 million hundredweight, down

MARKET NEWS

Due to the Columbus Day holiday, USDA did not issue an updated Bean Market News report this week.

Our regular pulse price table will return next week with the latest U.S. and Canadian market information.

CONT. ON PAGE 4 >>>



Pictured at Jawaharlal Nehru Port in Mumbai are, from left, Andrew Fjeseth, Montana Department of Agriculture; Brian Aklestad, chairman of the Montana Pulse Crop Committee; Adam Gutzwiller, Montana Department of Agriculture; Satish Upadhyay, secretary of the India Pulses and Grains Association; Justin Miller, Montana Farm Bureau Federation; and Jill Streit, director of the Montana Department of Agriculture.

MONTANA TRADE MISSION HIGHLIGHTS INDIAN MARKET

U.S. PULSE INDUSTRY ADVANCES EFFORTS TO REBUILD TRADE RELATIONSHIPS

India has long been an important market for U.S. pulse growers, but tariffs and unpredictable import policies have made it difficult to maintain consistent trade. A recent Montana agricultural trade mission brought renewed attention to those challenges while helping strengthen trade relationships in one of the world's largest pulse markets.

Montana Gov. Greg Gianforte led the October mission, which included representatives of the Montana Department of Agriculture, Montana Pulse Crop Committee (MPCC) and Montana Farm Bureau Federation. The delegation met with Indian government and industry representatives to discuss agricultural trade and opportunities for expanding exports.

Among the participants was MPCC Chairman Brian Aklestad, who joined Montana Agriculture Director Jillien Streit and other delegation members in meetings

focused on India's pulse industry. Aklestad emphasized the importance of the Indian market during an interview with Western Ag Network.

"India is the world's largest producer, consumer, and importer of pulses, so when they need pulses, the world needs to step up and provide it to them," Aklestad said.

"Hopefully, it's not just a container of peas, lentils, or chickpeas, but we'd like to discuss the value-added options that are out there."

"Establishing and expanding dependable international trade markets – especially with key global partners like India – is vital to ensuring that our producers have stable, long-term demand for their crops," Streit said in a news release.

On October 5, USA Pulses' India team, led by Sachin Khurana, briefed five Montana delegates in New Delhi on India's pulse production, consumption,

imports and trade policies. The discussion focused on challenges facing U.S. exporters, including unpredictable import duties, freight costs and competition from established suppliers, as well as opportunities for expanding sales of pulses, dry beans and value-added ingredients.

Another of the delegation's primary concerns was the uncertainty created by India's changing import policies. Those decisions are influenced by domestic crop production, prices, food security concerns and the government's efforts to balance the interests of Indian growers and consumers.

For U.S. growers, the challenge is finding dependable customers in a market where import duties and restrictions can change considerably from one year to the next.

Following the mission, Gianforte emphasized the importance of more predictable purchasing arrangements.

"There's got to be some baseline buying," Gianforte told Montana radio station KMON in an interview following the trip. "One of the key messages we delivered is, listen, if you want our farmers to help feed your people, you need to be a reliable customer," he said.

The USA Pulses coalition has been working to address specific trade barriers that affect the competitiveness of U.S. crops.

CONT. ON PAGE 3 >>>



Copyright
2026

2780 W. Pullman Road, Moscow, ID 83843 • www.usapulses.org • Ph: 208.882.3023 • info@usapulses.org

MONTANA TRADE VISIT CONT.

One example is India's customs classification of green and red lentils. Although they are commercially distinct products with different markets and uses, both fall under the same tariff classification. As a result, import duties intended to regulate India's red lentil market can also make U.S. green lentils more expensive and less competitive for Indian buyers.

Streit and Aklestad raised questions about the classification during the USA Pulses briefing. Establishing separate tariff codes for green lentils has been among USA Pulses' trade policy priorities.

The delegation also visited Jawaharlal Nehru Port in Mumbai and met with leaders of the India Pulses and Grains Association (IPGA), including Chairman Bimal Kothari, Vice Chairman Manek Gupta and Secretary Satish Upadhyay.

In an Oct. 7 statement, IPGA described the meetings as a "constructive exchange of perspectives" and expressed a shared interest in strengthening agricultural and pulse trade between India and the U.S.

IPGA has publicly called for more stable, long-term trade policies, arguing that frequent policy changes create problems for Indian farmers, traders and processors.

Delegation members and USA Pulses' India team also discussed opportunities for U.S. dry beans and value-added products, including pulse flours, proteins and other ingredients for India's growing food-processing industry.

In its third-quarter report to USA Pulses, the India marketing team detailed industry roundtables held in Ahmedabad and Vijayawada, where representatives met with importers, processors and food manufacturers to discuss opportunities for U.S. pulses. The team also identified prospective buyers interested in U.S. red kidney beans and black beans, while Indian food industry representatives participated in pulse and dry bean processing training at the Northern Crops Institute in Fargo, North Dakota.

The visit also helped bring renewed attention to trade barriers USA Pulses has been working to address. That visibility is particularly timely as the organization prepares for its next Washington, D.C., mission in February, when trade policy and market access will remain important issues for U.S. growers.

But the need for a dependable trade relationship goes both ways. With a population approaching 1.5 billion, India accounts for roughly 27% of global pulse consumption. Pulses are a staple of Indian diets, particularly among the estimated 39% of adults who identify as vegetarian.

Even as the world's largest pulse producer, India doesn't always grow enough to meet domestic demand. Kothari has previously emphasized the importance of imports in closing that gap. For India's pulse industry, maintaining relationships with reliable overseas suppliers, including those in the United States, is an important part of keeping food supplies moving.

Concerns about India's 2026 pulse production and the outlook for its upcoming rabi (winter-season) crop could create additional opportunities for U.S. growers. In a weather assessment provided to USA Pulses, its India representatives reported that below-normal monsoon rainfall has threatened pulse production in several regions. They also warned that insufficient soil moisture could affect the upcoming chickpea and lentil crops.

"Their monsoon season has been a little bit short, a bit of a drought, much like we were accustomed to at home, and so it looks like that going forward, they're probably going to need to supplement their local production with some more imports," Aklestad told Western Ag Network.

The delegation's visit helped bring longstanding trade challenges to the forefront and strengthen relationships with Indian industry leaders. USA Pulses is building on those efforts through continued outreach to Indian pulse importers, additional meetings with Indian industry representatives and culinary programs designed to introduce U.S. pulse ingredients to food manufacturers and foodservice operators. Its India team is also monitoring crop conditions and potential changes to import duties that could create new opportunities for U.S. growers.



USDA DRY BEAN FORECAST CONT.

U.S. DRY BEAN PRODUCTION 2025 ACTUAL vs. 2026 OCTOBER FORECAST (Metric Tons)



State	2025 Production (MT)	2026 Forecast (MT)	Change (%)
Colorado	26,490	23,270	-12.2%
Idaho	51,850	50,670	-2.3%
Michigan	265,440	231,600	-12.7%
Minnesota	271,700	259,180	-4.6%
Nebraska	113,490	68,580	-39.6%
North Dakota	423,250	282,590	-33.2%
Washington	65,910	61,920	-6.1%
U.S. Total	1,218,120	977,810	-19.7%

USDA forecasts lower dry bean production in all seven reporting states for 2026. Nebraska faces the steepest percentage decline at nearly 40%, followed by North Dakota at 33%. North Dakota, however, accounts for the largest loss in actual production. These are USDA's October forecasts, not final harvest figures.

Source: USDA-NASS, Crop Production, October 2026, page 21.

State production converted from 1,000 cwt to metric tons. Figures rounded to the nearest 10 MT; state totals may differ slightly from USDA's published national total.

from 9.33 million last year. Average yields are expected to fall from 1,650 to 1,400 pounds per acre.

"Weather really was the #1 driver this year for the current situation," Karley said.

In North Dakota and northwestern Minnesota, extended periods of high temperatures slowed plant development and reduced yield potential.

"The dry bean plants sat idle just trying to survive," Coulter said.

Cordell Huebsch, who grows dark red kidney beans near New York Mills, Minnesota, said his expectations changed dramatically as harvest approached.

"We were really expecting a bumper crop this year, but with all this heat, what we're finding is small pods, small beans," he told [Agweek TV](#).

"The pivots are what got us a crop," Huebsch said. Even with irrigation, what initially looked like a bumper crop was shaping up to be a "mediocre at best" harvest.

While dry peas, lentils and chickpeas are typically grown without irrigation, irrigation plays an important role in some dry bean production areas. This year, it helped growers like Huebsch avoid even greater losses. Huebsch said his irrigated fields in central Minnesota were likely to fare better than farms in the Dakotas and other areas without irrigation.

Conditions varied across the region. Timely rains helped produce a strong crop in west-central Minnesota, while irrigation supported production in parts of northwestern Minnesota. North Dakota growers, however, faced widespread losses.

Karley said some drought-damaged fields were abandoned or tilled under, potentially reducing harvested acreage beyond USDA's current forecast. Some industry estimates put average yields for pinto, black and navy beans in the Northharvest region as low as 1,250 to 1,350 pounds per acre.

The heat also left growers with unusually large quantities of undersized beans.

Coulter said elevators must screen out those beans, which often have little commercial value and can be costly to dispose of. The losses have also created disagreements among growers, elevators and crop insurance adjusters over how the undersized beans should be classified and accounted for.

Despite those challenges, Karley said the overall quality of marketable beans has been better than expected, particularly after a cool, wet stretch in September raised concerns about harvest conditions.

Tightening Supplies Change the Outlook

The smaller harvest arrived just as the industry was discovering that carryover inventories from the 2025 crop, particularly black and pinto beans, were not as large as anticipated. Karley said earlier supply estimates proved overstated as the previous marketing year came to a close.

That left the market facing a smaller new crop with less of a cushion than expected.

Karley expects supplies to remain tight across many dry bean classes during the 2026-27 marketing year. Similar production challenges in Canada and Mexico could further constrain North American supplies, although conditions differ by bean class.

The challenges facing dry bean growers are familiar across the pulse industry. Heat, drought and unpredictable weather can affect any crop. But what happens after harvest reveals some important differences. Unlike dry peas, lentils and chickpeas, dry beans are not

CONT. ON PAGE 5 >>>



Copyright
2026

2780 W. Pullman Road, Moscow, ID 83843 • www.usapulses.org • Ph: 208.882.3023 • info@usapulses.org

USDA DRY BEAN FORECAST CONT.

covered under Title I commodity support programs. Grading requirements, processing losses, crop insurance complications and markets that vary considerably by bean class add further complexity that isn't always apparent in production reports or market prices.

Higher prices offer some relief for growers, but those with reduced production may have fewer beans available to sell.

Attention is now shifting toward 2027.

USDA TO MAKE \$825M IN INT'L FOOD ASSISTANCE

The U.S. Department of Agriculture announced \$825 million in international food assistance funding Oct. 8, supporting purchases of U.S.-grown agricultural commodities for humanitarian and agricultural development programs around the world.

The funding will support three USDA programs: Food for Peace, McGovern-Dole Food for Education and Food for Progress.

Under the latest awards, Food for Peace will purchase approximately 129,000 metric tons of U.S. commodities for emergency food assistance in Ethiopia, Kenya, the Democratic Republic of Congo and Haiti. USDA has reached agreements in principle totaling \$357 million for eight projects.

The McGovern-Dole program will purchase 62,150 metric tons of U.S. commodities to provide school meals in seven countries, reaching approximately 1.2 million children and their families.

Meanwhile, Food for Progress will purchase 311,650 metric tons of U.S. commodities to support agricultural development and strengthen trade relationships in seven countries.

Combined, the three programs are expected to purchase approximately 502,800 metric tons of U.S.-grown agricultural commodities.

USDA says the investments are intended to address global food insecurity while supporting U.S. growers and developing future export markets.

Source: USDA Foreign Agricultural Service, Oct. 8, 2026.

Karley said discussions about next year's crop prices and contracts are already underway, even as the current harvest wraps up.

With growers having essentially one opportunity each year to adjust planted acreage, the industry is looking to next spring for its next chance to rebuild supplies.

While USDA forecasts a smaller dry bean crop, some industry observers say substantial carry-in inventories could complicate the market. In an October 15 report for [Pulse Pod online newsletter](#), reporter Dario Bard interviewed Sam Peck of Jack's Bean International, who estimated carry-in stocks at 113,000 metric tons of pinto beans and 80,000 metric tons of black beans. Peck said high grower prices are also making U.S. beans less competitive in export markets.

Bard's full report, [U.S. Dry Bean Harvest: Quality, Carry-In and the Price of Doing Business](#), includes a closer look at harvest conditions, bean quality and individual markets. Access requires Global Pulse Confederation membership.

For now, the dry bean market has moved from concerns about excess inventories and weak prices to a much different question: how smaller production, existing inventories and uncertain demand will shape the market heading into 2027. 

CALL FOR PROPOSALS

To All Interested Researchers,

It is time to consider submitting pulse research proposals for the USA Pulses Research Funding Program. These proposals are for FY 2027-28, starting July 1, 2027. The Request for Proposal (RFP) is available [here](#). The RFP will also be available on the [current USA Pulses website](#) shortly. The submission template is available [here](#) in MS Word or [here](#) in PDF. Our strategic plan and research priorities are [here](#) for your reference.

The instructions in the RFP include critical information such as:



Due date for the proposal submission:
December 4, 2026
(Midnight, Pacific Standard Time)



Dropbox folder for submission: [here](#)

If you have any questions, please contact **Yukiko Naruoka**, Director of Research and Seed Management, at ynaruoka@usapulses.org or **Genevieve Taylor**, Project Manager for Research and Coalition Development, at gtaylor@usapulses.org.





BARTSCH JUDGES PROTEIN INNOVATION COMPETITION

Eric Bartsch of AGT Food and Ingredients (fourth from right) joined a panel of five industry judges for the Protein Innovation Pitch Slam at the Bridge2Food North America Summit in Minneapolis on Oct. 14. The competition brought together emerging food technology companies showcasing new approaches to protein production and ingredients.

Superbrewed Food received the Jury Award, while Maia Farms took home the Audience Award.

"Was a great event to judge. Lots of innovation in the food space today!" Bartsch said. 🌱

Friday Funny!



**THE HOME INSPECTOR
WAS NOT HAPPY WITH MY
FIRE ALARM**



UPCOMING EVENTS

Oct. 17-21	SIAL Paris
Oct. 20-23	FIGAP 2026, Guadalajara, Mexico
Oct. 20-23	Thailand Culinary Spark
Oct. 20-22	FIRA Yakima, WA
Oct. 26-29	Trade Mission and Culinary Spark Training, Lima, Peru

PulsePipeline

Your Pulse Connection

USA Pulses

2780 W Pullman Road
Moscow, Idaho 83843
208-882-3023 www.usapulses.org
All rights reserved. 2026.

Tim McGreevy, CEO
tmcgreevy@usapulses.org
Drex Rhoades, Editor
drhoades@usapulses.org

USA PULSES IS AN EQUAL
OPPORTUNITY EMPLOYER AND PROVIDER.



Copyright
2026

2780 W. Pullman Road, Moscow, ID 83843 • www.usapulses.org • Ph: 208.882.3023 • info@usapulses.org