THE

ORNAMENTAL SECTOR

IN MEXICO

Office of the Agricultural Counsellor
Royal Netherlands Embassy
Mexico City

Version 30-04-08

INTRODUCTION

The report "THE ORNAMENTAL SECTOR IN MEXICO" has been written with two objectives.
Firstly, to provide information for Mexican organizations in the ornamental sector. This is because of our close cooperation with the Mexican Flower Council (CMF). Moreover, a Memorandum of Understanding (2003) between the Ministries of Agriculture of Mexico and the Netherlands focuses in particular on the ornamental sector.
Secondly, to provide useful information for Dutch companies that want to export products or production inputs related to cut flowers or pot plants.
With this dual aim in mind, the Terms of Reference (see annex 1.1) of the study were elaborated upon together with the CMF.

The first aim results in a general analysis of the ornamental sector. Evolution of production area, prices, exports as a basic insight in the evolution of the sector. At the same time lists of the most important producers, basic statistics and information on natural conditions are provided in a detailed form in annexes.

The information presented for use by Dutch companies is based on prior information requests to the Office of the Agricultural Counselor by the Dutch ornamental industry over a number of years. This includes insight in trends in imports and production, level of technology, most important players, import tariffs, import regulations and a description of the actual situation on breeders' rights. The study also identifies priority areas for further investigations.

As currency units the US $ has been used for production and exports because of the stable link between this currency and the Mexican peso. For exports from the EU the Euro was used.

The study is an extension and update of the report about the cut flower industry written by Rabobank International Mexico in 2000.

A first, rather descriptive version of the study with a focus on international trade was submitted by consultant Cees van Vliet (Horticonsult BV).
The study was revised and elaborated upon, notably for the crucial required information on production, by Friso Klok during a three months period on location in Mexico. The last mentioned an internee from the University of Professional Education Larenstein in Wageningen, focused also on the collection and analysis of required quantitative data and the elaboration of lists of producers and other relevant annexes. Finally, also the Office of the Agricultural Counselor spent also considerable time on some aspects of the study.

The study cannot yet be considered as a final product; some essential data are lacking and as more insight is obtained, the report should be adjusted.

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SUMMARY AND CONCLUSIONS

For years, experts, both from Mexico and from various other countries, have stated that Mexico could become a major producer of cut flowers and that Mexico will be the US production garden for ornamental products, as it already is for a wide range of vegetables. But, while the export of greenhouse vegetables has increased substantially and part of this sub sector uses high tech greenhouse technology, this is only in a few cases valid for ornamental production. The reasons for this relative stagnation are not clear. A major factor could be the fact that producers of cut flowers and ornamental plant are mainly smallholders.

Positive aspects in relation to the export potential to the US are the wide range of favorable climates for production of both cut flowers and potted plants in Mexico, the favorable distance to the US market and relatively cheap labor. Besides this, flowers play a very important role in Mexican traditions and culture. The consumption of flowers is, taking into account the average income level, relatively high.

The domestic Mexican market has been relatively favorable in recent years. It is expected that the domestic demand continues to grow due to increasing standards of living in Mexico. However, due to an expansion of production over the last 5-10 years, real prices of some flower varieties are decreasing slightly over the years and the average trend of real prices for the whole sector are likely only be marginally positive. It is not known to what extend production costs have increased and if this increase was compensated for by higher levels of productivity.

From the data in the SIAP (Servicio de Información Agroalimentaria y Pesquera), the statistics division of the Ministry of Agriculture, it can be derived with some corrections that Mexico used in 2006 at least 11.703 hectares for the production of cut flowers. A rough estimate of the area under pot plants and foliage amounts to 4100 hectares. This means a total of some 15.800 hectares. There are possibly some 10.000 producers of cut flowers and maybe 5.000 producers of ornamental plants.

Since about five years some groups of individual growers have been formed that co-operate in the distribution and marketing of the flowers throughout Mexico and the United States.

Exports remain with some 12% of the production value (related to cut flowers only) relatively small. And, until recently, exports were stagnating for almost all ornamental categories; cut flowers, ornamental plants and foliage. But 2005 and 2006 have shown a remarkable growth in export value.
Of the Mexican exports of cut flowers an average of 96% is exported to the US and approximately 4% to Canada.

Mexican imports of planting material and cut flowers have been increasing considerably. The value of imports of cut flowers increased from EUR 0.4 million 1996 to EUR 2.6 million in 2006. In the same period the imports of flower bulbs grew from EUR 3.4 million to EUR 21.0 million (for conversion factors between Euro and US dollar and the Mexican Peso see annex 1.2).

In countries where a substantial part of the production of ornamentals is exported, breeders' rights are automatically enforced as breeders can enforce sanctions at the moment of import in most countries. In Mexico the local market dominates and illegal multiplication requires action from the side of the Government. Since a few years effective action is being taken based on the existing legislation. A new law is being discussed in Parliament that will permit tougher measures against producers that multiply or use illegal plant material. This new law will also allow Mexico to sign UPOV 1991. Registration by foreign breeders is therefore now useful.

The Ministry of Agriculture also promised to take immediate action on the basis of complaints by foreign breeders as to illegal multiplication by specific local companies. Requests for sanctions against specific local companies that multiply registered varieties will be honored.

The most important part of the pot plants production is situated in the State of Morelos and for cut flowers this is the State of Mexico. In these states the climate is ideal to grow a big assortment of species without high investments. For general climate indication see maps of types of climate (temperatures), mountain ranges and rainfall (annexes 1.3-1.5)

Basically, Mexico has, compared with other Latin American exporters to the U.S., the advantage of proximity and therefore lower transport costs. The climate is in several areas comparable with countries as Colombia and Ecuador. At the same time, all inputs from the US and the EU are free of tariffs and so are exports. Main disadvantages are the structure of production, smallholders, and the limited number of specialized exporters.

Opportunities for the development of the ornamental sector consist of:

- the local production of planting material, stimulated by increased confidence in breeders'rights,
- the establishment of U.S. flower production companies in Mexico under pressure of increased labour costs due to measures against undocumented cheap Mexican labour in the U.S.,

The potential growth of the Mexican ornamental industry offers opportunities for the export of technology and inputs from the Netherlands, especially in relation to:

- Planting material. Mexico buys around 95% of its planting material abroad. In 2006 flower bulbs worth EUR 19 million were imported from The Netherlands. The imports of bulbs grew substantially in the last 10 years. Mexico could also become an important supplier of planting material for the US market. Climate, cheap labor and the proximity of the market play an important role in this.
- Export of flowers. Dutch exports to Mexico of floricultural consumer products like cut flowers and potted plants are limited but growing strongly. This is mainly because of high demand of high quality varieties of cut flowers so far not available in Mexico. Imports are also possible during off seasons of local production.

Dutch companies provide already have an important position in relation to the export of planting material and flowers to Mexico. This is also confirmed by the large number of companies with a Mexican representative (see annex 1.6)

Further research is required on the ornamental sector with as priorities:

- investigation of the reliability of earlier published statistics; production area, productivity, prices (by consultations of producers and government organizations at the State level and by comparing with the result of the 2007 census),
- production costs as these data are completely lacking,
- analysis of all relevant results for the ornamental sector of the 2007 agricultural census,
- identification of areas suitable (optimal) from the climatic point of view for the production of important types of cut flowers, ornamental plants, foliage, and ornamental trees,

This study is divided into seven chapters. The first chapter provides an overview the ornamental sector. The next two chapters deal with the production and structure of respectively the cut flower and the pot plants sectors. Chapter four provides information about the trade in all inputs and last three chapters deal with plant breeder's rights, education and rules and regulations. Detailed information about the most important producers and exporters in the ornamental sector can be found in the annexes.

C O N T E N T S

1 ORNAMENTAL SECTOR: GENERAL

1.1 History

Cut flowers and pot plants have always played an important role in Mexican culture and customs. Professional growing started during the nineteen fifties, also somewhat stimulated by the immigration of Japanese and Spaniards with some experience in the ornamental sector. During the sixties the first grower associations were established in the central states, mainly the State of Mexico, Morelos, Distrito Federal and Jalisco (see figure below). In the seventies, the first growers received financial incentives by the government. The sector grew rapidly during the nineties and in this decade the first trading companies were established. Also, organizations like the Mexican Flower Council and POMAC, associations of respectively cut flower and ornamental growers (see annex 1.7) were created.

MEXICAN STATES

1 Aguascalientes
2 Baja California N
3 Baja California S
4 Campeche
5 Coahuila
6 Colima
7 Chiapas
8 Chihuahua
9 Distrito Federal
10 Durango
11 Guanajuato
12 Guerrero
13 Hidalgo
14 Jalisco
15 Estado De México
16 Michoacán
17 Morelos
18 Nayarit
19 Nuevo León
20 Oaxaca
21 Puebla
22 Querétaro
23 Quintana Roo
24 San Luis Potosí
25 Sinaloa
26 Sonora
27 Tabasco
28 Tamaulipas
29 Tlaxcala
30 Veracruz
31 Yucatán
32 Zacatecas

The Sistema Producto Ornamentales (SPO), a program pointed at improving the sector as a whole, was set-up in 2005. This program is financed by the federal and state governments. An important part of the SPO is coordination of all parties involved in the sector – producers, traders, providers of inputs, scientists and government agencies in order to stimulate its development. Gathering of statistical information and developing educational programs are part of its activities.
As pointed out above flower production started initially in the central states of Mexico. Later on, during the late eighties, entrepreneurs in Baja California also recognized export possibilities offered by their neighbor, the US state of California and started operations.

The first attempts were made in the early eighties to export flowers to the USA. During these years the exports of cut flowers developed steadily. Flowers were mainly transported to distributors in the southern states in the US. Later some growers also started exporting to a few European markets. For cut flowers this destination was only on an incidental basis.

One major change in the conditions for export of cut flowers to the U.S. has been the introduction of the so-called *procona* in the year 1997, a carton box with a plastic bucket in it, which allows the flowers to be transported in water. Initially exports received a boost and later on the procona was also introduced on the local market. However, export figures show that the introduction of the procona has not been sufficient to keep up with the competition. The years 2000 to 2004 show a decline in exports of cut flowers. But this trend was reversed in recent years: 2005 and 2006 show again (strong) growth in the export to the US.

During the 1990-2006 the annual increase of the area under cut flowers, amounted to some 3.7%. As the data for pot plants are not reliable, the total increase in the area for ornamentals is not known. The increase was obtained by small growers entering the market or expaning existing production. Parts of the global developments (improvement in production, distribution and marketing) in the last decades have not taken place in Mexico as the growers were mainly focused on supplying the constantly increasing demand in the local market. Many small growers entered the market with relatively low quality products using the traditional ways of distribution.

Growers who used to export (particularly during the holidays) faced the increasing competition on the North American market. However, the growth of the local market and reasonable prices made it possible for them to simply withdraw from this competitive market and re-direct their product to the home market. Annex 1.8 provides a list of the major exporters, mainly cut flowers, indicating the types of flowers as well as the size of the production, as almost all exporters are at the same time producers.

Still there is a considerable amount of growers maintaining their level of competitiveness by specializing on some flower species and improving their distribution. It is estimated that there are some 100 of these growers, of which 50 are located in the State of Mexico (see next paragraph). A number of growers implemented new techniques and equipment and gained more knowledge.

The *Central de Abastos*, the Central Wholesale Market of Mexico-City, is the main wholesale outlet for cut flowers from the State of Mexico and Puebla, the main production area. According to the Mexican Flower Council in the State of Mexico 55% of the national production is brought to this market. Circumstances for selling flowers at the Central de Abastos are relatively simple.

Recently the new market, FLORACOPIO, close to the main flower production area, Villa Guererro, has started operations. It is owned by producers and expected to become an important market.

1.2 Production

Based on data from SIAP (Servicio de Informacion Agroalimentaria y Pesquera) of the Ministry of Agriculture it is estimated on the basis of some adjustments that 11.703 hectares of cut flowers were grown in 2006. For pot plants a rough estimate amounts to some 4.100 hectares of pot plants.

AREA PRODUCTION OF ORNAMENTALS (Hectares[1])

YEAR	CUT FLOWERS [2]		POT PLANTS [3]		TOTAL	
	SIAP	CORRECTED	SIAP	CORRECTED	SIAP	CORRECTED
2001	12.252	11.347	961	N.A.	13.213	N.A. [4]
2002	12.021	10.551	1.152	N.A.	13.173	N.A.
2003	12.415	10.959	916	N.A.	13.331	N.A.
2004	11.729	10.795	1.611	N.A.	13.340	N.A.
2005	12.210	11.326	1.628	N.A.	13.838	N.A.
2006	12.525	11.703	1.753	4.100	14.278	15.803

Source: See par 2.1.2 and par. 3.1.2

Notes:
[1] Area is in hectares harvested
[2] See annex 2.1. Marigold area estimated bases on the hypothesis of a 30% use of the numbers given by SIAP in view of remaining use as colorants. The total of states without statistics has been estimated at a constant 200 hectares
[3] Pot plant production also contains parts of foliage and trees production as these could not be separated in the statistics; see annexes 1.13 and 3.1.
[4] Not available.

The production value at the farm gate amounted in 2006 for cut flowers to 3183 million pesos (USD 312 million; see par.2.1.4).
For pot plants only a hypothisis is possible. If the area under pot plants (and folliage) amounts to 4.100 hectares and in case the value per hectare would be equal to that of cut flowers, the value would be some 1.100 million pesos or USD 110.million. In that case the total value of production in the ornamental sector is approximately 4300 million pesos or USD 430 million.

On the basis of this data it results that in 2006 some 18% (USD 77 million) of the total production value goes to external markets, mainly to the United States (see par. 4.1.1.1).

It should be pointed out that the production data provided by the SIAP is in some cases not complete, especially from the smaller states, but as a whole it certainly gives a relevant indication as far as cut flowers is concerned.

According to the CMF four different types of flower producers can be distinguished in the most important production area, the State of Mexico.

First there are the growers that produce cut flowers in the open field in combination with other crops such as maize. This group represents around 75% of the total amount of growers in Mexico. The level of technology and cultural practices applied in flowers are low.

Secondly there are the growers that produce cut flowers in plastic tunnels in soil. Some of these growers are former labourers of flower farms that have started to work for themselves. They have little resources available to invest in floriculture but they recognize the need for some type of protected cultivation. They are attracted by market opportunities for flowers and they produce at low cost. These growers produce entirely for the local market.

Thirdly, there are the growers that have invested in floriculture, usually farms that employ a full time technical expert in charge of the day to day management. These companies have invested in greenhouses, have experimented with different substrates, apply drip irrigation and have access to a cold room. The area of greenhouses may vary from 2 – 10 ha or sometimes larger. Some of these producers sell a part of their flowers to an export market or have the ambition to do so. It is estimated that some 25-30 companies belong to this category of producers.

Lastly, there are growers as category 3 that have up graded their facilities and apply more advanced production practices. These growers (10-15 companies) belong to the top category and a significant part of their production is exported or sold to high standard local markets.

1.3 Trade

Since the late eighties a central theme of Mexican foreign policy has been free trade. Of crucial importance has been the North American Free Trade Agreement (NAFTA). Mexico focused on bilateral relations with countries within the hemisphere in an effort to improve its trade and investment potential. It has signed free-trade agreements with several Latin American countries. In 2000 also the EU Free Trade Agreement entered into force.

Implementation of the NAFTA began on January 1, 1994. The Agreement removed most barriers to trade and investment among the United States, Canada, and Mexico. Many tariffs were eliminated immediately while others were scheduled for phase outs over periods of 5 to 15 years. On 01-01-08 tariffs and quota for the last four products (corn, beans, sugar and milk powder) were eliminated.

As is shown in annex 1.9 import tariffs of planting material and flowers with regard to the United States, the European Union and third countries are now respectively zero or very limited.

Because of NAFTA, cut flowers and ornamental plants have been exported from Mexico to the US without any import duty since many years. Before NAFT, import duties to the US amounted on average to some 5%. Tariffs on roses were 4%, carnations 4%, chrysanthemum, anthurium and orchids 8% and “other flowers” 5-7%. With the exception of roses (5 years) these tariffs were reduced to zero immediately (1994) after NAFTA became operational (RABOBANK 2000, page 15).

Consequently, not trade barriers as such are limiting the export to the US, but plant health regulations and measures under the Homeland Security Act. Mexico faces the same plant health restrictions as any other country, in particular the ban on the import of plantlets in soil or peat moss. There are hardly any exports of pot plants from Mexico to the U.S.

All flower exporting countries in the American hemisphere can be seen as competitors for the Mexican cut flower industry. According to the US Department of Commerce, Colombia is by far the most important flower exporting country to the US with an amount of 454 million USD in 2005, followed at a distance by Ecuador (142 million). The Netherlands (73 million) and Canada (63) are the numbers three and four, Costa Rica (37) and Mexico (32 million) five and six. Since 2004 Mexico is regaining import share on the US market. The import share has increased from 3% to 4% during the last three years.

The imports and exports of especially planting material and other inputs and Mexican export of cut flowers will be analyzed in chapter four.

1.4 Consumption

Flowers and pot plants play a prominent role in the Mexican way of life and culture. The market is seasonal. During the holiday dates the prices rise substantially (see paragraph 2.3). The Mexican domestic cut flower market might have a value of some USD 1.000 million at consumer's price level assuming that that the consumption of ornamental products is about USD 10 per capita. In other, further developed countries, the per capita flower consumption is considerably higher; see annex 2.7.

Big wholesalers some days need 2 market days to fill their trucks, most of which are not temperature controlled. Beside these big traders also small street sellers are purchasing on the Central de Abastos. It is estimated that on an average day 2.000 to 3.000 buyers visit the Central de Abastos. On special flower days, such as Mothers Day, Valentines Day and specific religious days such as All Saints, there even might be 6.000 to 10.000 buyers from all over Mexico. The five peak holiday periods are (RABOBANK 2000):

- From February 8th to 18th (Valentine's Day)
- From March 12th to 25th (Spring)
- From May 7th to 13th (Mother's Day)
- From November 1st to 10th (All Souls, Day of the Death)
- From December 1st to 25th (Guadalupe's Day and Christmas Day)

Although no official figures are available it is generally assumed that the traditional outlets are not suffering from a dropdown in sales because of new outlets entering the market. It is estimated that 95% of flower products is sold through traditional outlets and 5% through retailers. Total growth of flower consumption is that strong that the market offers room for new outlets and ways of selling. The demand for lilies, gerbera, tulips and Transvaal daisies is growing. The Mexican consumer seems to have a preference for bright colors, large flowers and everything that is peculiar or new.

1.5 Policy

Apoyos y Servicios a la Comercialización Agropecuaria, *ASERCA,* is a decentralized organ of the Secretaria de Agricultura, Ganaderia, Desarrollo Rural, Pasco y Alimentacion (SAGARPA), created in 1991 to provide Mexican farmers with modern promotion and commercialization tools, required for a country inserted in global markets and free trade.

ASERCA has two main functions:

- Strengthen the trade and commercialization of agricultural products, by providing federal funds to support primarily grain and oilseeds, on a strictly selective and geographical basis, as well as promote modern trade and supply chain management alternatives, create and spread industry information and identify and promote exports.
- Manage the Program de Apoyos Directors al Campo (PROCAMPO), which is a key program of the Mexican government to transfer financial help as income directly to the producers, which are typically low-income and from several sectors. More than 4 million applications are received every year and 3 million payments are made, covering more than 14 million hectares.

MexBest is the institutional body created to present and promote Mexican agricultural products with export quality at the most important trade shows and conferences of the agricultural industry, which take place at the most important export markets, amongst others also the International Hortifair at Amsterdam RAI. The purpose of MexBest is that a greater number of producers promote the quality, volume, safety, presentation and availability of their products in the international markets to increase their sales and so occupy bigger niches. Support is given at exhibition booths, preparation, shipping and arrival of samples, exhibition passes, translation services and consulting services before and during the event. The goal is to consolidate the MexBest image, already internationally known, as the way Mexico participates in agricultural and food events.

The organization of the flower growers is organized per state with the *Conseco Mexican de la Floor* (CMF), the Mexican Flower Council, as federal organization. The CMF has regular contacts with the federal and state' s governments to develop policies and programs focused on the flower industry, but activities so far are mainly focused on the development of the national market channels and the organization of seminars for growers. During the last years the CMF has been developing a project about the creation of a new *Mercado de Abastos* focused only on flowers (the Mexico City market also sells food products). After many years of negotiations between producers and the government of the State of Mexico it is expected that in the first months of 2008 the new wholesale market will be opened. This market is situated just south of Toluca, the capital of the State of Mexico and very close to the production area Villa Guerrero. The organization bought the former Distribution Center from the US supermarket giant Wal-Mart. After rebuilding, with advice from Flower Auction Aalsmeer, this venue should become the center of the marketing of cut flowers. The venue consists of some big concrete halls, an office building and parking lots and is situated at a very good location from a logistical point of view.
The CMF is also the promoter of EXPOFLOR, one of the two relevant exhibitions in the ornamental sector (see annex 1.10)

In the by far dominant state for pot plant growing, Morelos, the growers are organized in an organization called POMAC (Product ores de Ornamentales de Morelos). This organization has similar aims as the CMF, but does not operate on a national scale.

See annex 1.7 for the contact data of the CMF and POMAC.

Mexico has specific programs to develop and promote the ornamental industry as a whole. The new *Sistema Producto Ornamentales* is a federal program that started in 2005. It aims to improve the ornamental sector, taking into account sustainability.
The SPO brings together representatives of producers, exporters, providers of inputs and government agencies. But also specialists from Universities and Research Institutes (see annex 1.11) are involved.
The CMF plays an important role in this program as the federal representative organization of producers of flowers and plants. A focus of the SPO is an educational program for growers. The program started in 2006 and is focused on technical and entrepreneurial skills, including sustainable development.

From the side of the Government or Sector Organizations there are no specialized publications or magazines in relation to the ornamental sector. In fact there is very few Mexican specialized magazines at all, even from the private sector (see annex 1.12).

2 CUT FLOWERS

2.1. Production

2.1.1 Basic data area cut flowers

In annex 2.1. the basic area data for the cut flower sector are presented. The table was derived form the computer files of SIAP by defining "cut flowers" (see table 1.13, also presenting the names of cut flowers in various languages).

Marigold (Zempoalxochitl) is listed in the SIAP data under two sub headings; one explicitly as an ornamental crop and one without further specification. According to SIAP, its use as a colorant has practically disappeared since about 5 years. Earlier there was also a sub heading for use as cattle feed that is no longer applied.
In 1990 the crop accounted in the statistics for 37% of the total area under cut flowers if all the area under this crop is considered as such. In 2006 this total area was reduced to 8%. Marigold is still important in the state of Puebla (800 ha), Oaxaca (180 ha) and, until 2004 in Sinaloa (300 ha).
Arbitrarily, we apply here as a hypothesis that only 30% of the total area under marigold is used as cut flowers during the period 2001-2006. The figures before e.g. 2001 are, because of the heavy dependence on Marigold, less reliable. For this period (not added in the annex) the hypothesis used is that the area for use as cut flowers was not more than the average for the period 2001-2006.

For several states, namely Aguascalientes, Campeche, Chiapas, Colima, Nuevo León, Quintana Roo, Tabasco, Tamaulipas and Zacatecas, no SIAP data are available at all. Based partly on the list of producers (annex 2.3) one could estimate that the area under flowers in these states might amount to at least some 200 ha.

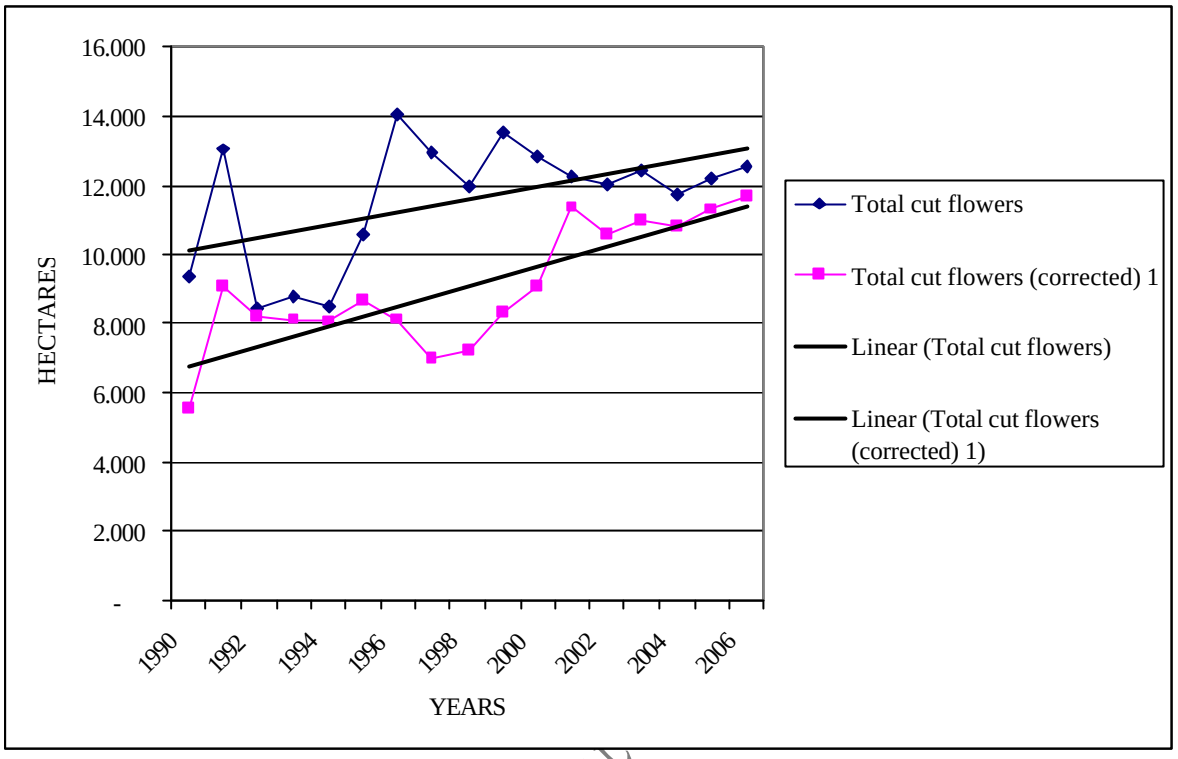
A remarkable element in the SIAP statistics (see annex 2.1) is the high figure, 1.016 ha for "flowers" (2006), a category that cannot defined by type of flower and in fact should be named "other flowers". It suggests a larger variety of flowers produced. This is the case for Baja California (41%), Puebla (31%), Oaxaca (9%), Jalisco (5%) and Veracruz (5%).

As to the development of types of cut flowers, the figures in annex 2.1 show, that:

- roses (Rosa L.) and gladioli (Gladiolus L.) are the most traditional cut flowers grown,
- carnations (Dianthus caryophyllus L.) and especially Transvaal daisy's (Gerbera jamesonii spp.) have supposedly only developed after 1990,
- the category "other" is in most states relevant; from some 16% in the state of Mexico to 44% in the state of Puebla. This category can be split up only for a smaller part in some other specific types of flowers and "flowers".

The following graphs show the development of the area (hectares) of the national cut flower production. From these data results that production area has increased with 72 % in the period 1990-2006. This means a yearly growth of 3.7 %.

DEVELOPMENT OF AREA UNDER CUT FLOWERS (hectares)



Source: Elaborated by the Office of the Agricultural Counsellor. See annex 1.13 and 2.1.

Note: [1] In the corrected SIAP data, Marigold has been given a 30% allocation as cut flower for 2001-2005 and for the period 1990-2001 the average for the 2001-2005 was used.

2.1.2 Regional concentration

Production of cut flowers in Mexico is highly concentrated with 82% of the national production located in only five states and 48% in one state (see table). The main production areas of cut flowers are the State of Mexico, Puebla, Morelos, Michoacán, Guerrero and Baja California. The central states are characterized by their moderate climates and proximity to the capital Mexico City, the centre of flower trading and consumption. Baja California has its specific climate and a large market on the other side of the border. Around 80% of the production in Baja California is exported to the United States. Also the southern state of Chiapas and gulf state Veracruz are taking advantage of their particular tropical climates to produce flowers and greens. Unfortunately there are no reliable data available for these states, but there are several big companies with a high level of technology in this area (see annexes 2.3 and 3.3 for the major cut flower and pot plant producers).

AREA PRODUCTION CUT FLOWERS PER STATE[1] (Hectares[2])

STATE	YEAR											
	2001		2002		2003		2004		2005		2006	
	Has	%	Has	%	Has	%	Has	%	Has	%	Has	%
Mexico	5.628	50	4.958	47	5.130	47	5.162	48	5.448	48	5.628	48
Puebla	2.886	25	2.382	23	2.534	23	2.537	24	2.542	22	2.574	22
Morelos	1.047	9	1.151	11	952	9	1.106	10	1.243	11	1.391	12
Michoacán	451	4	460	4	429	4	447	4	523	5	628	5
Baja California	242	2	380	4	418	4	396	4	392	3	420	4
Guerrero	338	3	286	3	257	2	463	4	338	3	338	3
Veracruz	118	1	163	2	273	2	123	1	220	2	218	2
Oaxaca	152	1	95	1	123	1	50	0	215	2	172	1
Querétaro	101	1	50	0	56	1	80	1	93	1	93	1
Jalisco	39	0	41	0	83	1	84	1	80	1	81	1
Other	344	3	585	6	706	6	348	3	233	2	161	1
TOTAL SIAP	**12.252**	N.A.[3]	**12.021**	N.A.	**12.415**	N.A.	**11.729**	N.A.	**12.210**	N.A.	**12.525**	N.A.
TOTAL corr.[4]	**11.347**	100	**10.551**	100	**10.959**	100	**10.795**	100	**11.326**	100	**11.703**	100

Source: Derived from SIAP data (see annex 2.1.).

Notes: [1] SIAP database incorporate 23 out of the 32 Mexican states; for 9 states no data are available.

[2] Area harvested.

[3] Not applicable.

[4] Hectares harvested of Marigold: the corrected total includes only around 30% of total Marigold. "Total SIAP" includes all Marigold produced.

The table above shows the production of cut flowers per state based on (corrected) official governmental data. The State of Mexico is the most important cut flower producing state in the country. Until the 1960's still an area of mainly avocado production, it represented in 2006 almost half of the national cut flower area. Because of the relative high level of technology (production is for some 90% in greenhouses) in this region the production value amounts to a disproportional higher share of the national production value. Growing conditions here are comparable with those in Colombia and Ecuador.

The table shows a considerable decline in harvested area in the State of Mexico in the year 2004. This decline was caused by the various diseases, notably gladiolus rust (uromyces transversali) which was detected in November 2004 and affected the production of gladiola.

According to the Secretary of Agricultural Development of the State of Mexico the region *Villa Guerrero* represented in 2004 around 3.000 hectares of the total production of this state. In 2005 this has grown to 3.193 hectares. This means that this region represents 72% of the production in the State of Mexico and 24% of the national production of cut flowers which makes this region the centre of cut flower production in Mexico. Other important production regions, also located in the State of Mexico, are *Tenancingo* 706 hectares and *Coatepec Harinas* 607 hectares. Chrysanthemum (Chrysanthemum L.) is the main flower variety grown in these regions. According to SIAP 2.379 hectares of this flower are grown in the state. Chrysanthemum is followed by gladiolus 946 hectares, carnations 722 hectares and rose 477 hectares. Also gerbera is a flower grown in this region. See annex 2.1 for an overview of the

main varieties grown in the various states.

Other important producing states are Puebla (22%), Morelos (12%), Michoacán (5%), Baja California (4%) and Guerrero (3%).
In paragraph 2.1.5 the general characteristics of the main producing states will be described.

2 1.3 Assortment

The cut flower assortment grown in Mexico is very diverse in a sense that it includes types of flowers no longer grown in professional growing areas. Most familiar are gladiolus, chrysanthemum, rose and African marigold (Tagetes L. spp.) a flower grown for All Soul's Day (November 2nd) and the Day of the Virgin Guadalupe (December 12th). For these occasions also matthiola (Matthiola spp.) and gypsophila (Gypsophila spp.) are grown in the open field.

AREA CUT FLOWERS BY VARIETY (Hectares[1])

FLOWER TYPES	YEAR											
	2001		2002		2003		2004		2005		2006	
	Has	%	Has	%	Has	%	Has	%	Has	%	Has	%
Gladiolus	3.624	32	3.128	30	2.737	25	3.310	31	3.399	30	3.613	31
Chrysanthemum	2.466	22	2.261	21	2.388	22	2.333	22	2.391	21	2.462	21
Rose	863	8	897	9	972	9	897	8	946	8	1.098	9
Carnation	724	6	720	7	710	6	737	7	755	7	712	6
Gypsophila	1.070	9	745	7	763	7	722	7	872	8	697	6
Matthiola	403	4	385	4	385	4	373	3	436	4	439	4
Marigold Marigold corr. [2]	(1.293) 388	3	(2.100) 630	6	(2.080) 624	6	(1.334) 400	4	(1.263) 379	3	(1.175) 353	3
Tuberosa	266	2	232	2	272	2	267	2	232	2	280	2
Bird of Paradise	145	1	158	1	190	2	212	2	206	2	207	2
Sunflower	265	1	139	1	197	1	206	1	147	1	141	1
Sea Lavender	146	1	94	1	140	1	129	1	96	1	117	1
"Terciopelo"	80	1	39	0	51	0	67	1	77	1	82	1
African Lily	28	0	64	1	66	1	38	0	64	1	50	0
Pom-pom Chr.	-	0	-	0	-	0	-	0	-	0	3	0
Other	879	8	1.059	10	1.464	13	1.104	10	1.326	12	1.449	12
TOTAL SIAP	**12.252**		**12.021**		**12.415**		**11.729**		**12.210**		**12.525**	
TOTAL corr. [2]	**11.347**	100	**10.551**	100	**10.959**	100	**10.795**	100	**11.326**	100	**11.703**	100

Source: Derived from SIAP data (see annex 2.1.)
Notes: [1] Area harvested.
[2] Hectares harvested of Marigold : total in parenthesis and estimated hectares for ornamentals below (around 30%).

The above table shows that essentially five varieties dominate the market: gladiolus, chrysanthemum, roses, carnations (Dianthus), Gypsophila, Matthiola and African Marigold (Tagetes erecta). Gladiolus is the most important flower grown in Mexico in terms of area. If value is used, then roses are dominant.

Gladiolus and chrysanthemum represent together 52% of the total area under cut flowers. The considerable decline in harvested area of gladiolus was caused by the gladiolus rust. These flowers are relatively easy to grow and are less labour-intensive then roses and carnations. The increase of rose production has to do with the fact that there is both a strong domestic and export market for this variety. Estimates of the CMF point out that in 2006 at least 1.200 hectares of roses are grown, of which 90% in greenhouse conditions with the State of Mexico representing the major part of rose production (90%). The increase of rose production has caused a small decline in rose prices in real terms (see annex 2.2).

Other species of flowers that are naturally grown are African lily (Agapanthus spp.), birds of paradise (Strelitzia reginae Ait.), calla (Zantedeschia aethiopica) and Tuberosa (polianthes tuberosa). With the arrival of professional growers species like rose, alstroemeria (Alstroemeria L.), lily and Gerbera were introduced. However, before more common species like chrysanthemum (mainly polar), gladioli and carnations were already grown. Later on complementary species like aster (Aster L.), solidago (Solidago spp.), statice (Limonium sinatum), freesia (Freesia Klatt), etc. were introduced. And in the more tropical areas anthurium (Anthurium andraeanum spp.) became popular. Nowadays a wide assortment is available according to the demand from the Mexican consumer. There is definitely still room for new introductions.

2 1.4 Production value

PRODUCTION VALUE OF CUT FLOWERS (2006)

TYPES OF CUT FLOWERS	AREA	PRODUCTIVITY[1]	PRICE	PRODUCTION VALUE		
	Hectares	Unit	Mex$ per unit	Mex$ (mln)	USD (mln)	%
Gladiolus	3.613	-	5.678	1.107	105	35
Chrysanthemum	2.462	-	122	876	83	28
Rose (gruesa)	1.098	10.118	285	389	37	12
Marigold (Tagetes erecta)	(1.175)	-	(2.245)	(558)	(53)	
Marigold (T.erecta) corr.[2]	353	-	674	167	16	5
Carnation (gruesa)	712	7.288	75	117	11	4
Gypsophila m.	697	-	1.309	41	4	1
Matthiola	439	-	1.222	23	2	1
Tuberosa (gruesa)	280	1.283	109	14	1	0
Bird of Paradise (gruesa)	207	449	154	13	1	0
Sunflower	141	-	10.678	7	1	0
Sea Lavender (manojo)	117	6.000	10	4	0	0
"Terciopelo"	82	-	2.566	3	0	0
African Lily (gruesa)	50	510	151	-	-	-
Pom-pom Chr. (gruesa)	3	1.468	82	-	-	-
Other cut flowers	1.449	-	15.689	422	40	13
Total SIAP	**12.525**	N.A.[4]	N.A.	**3.574**	**340**	N.A.
Total corr.[3]	**11.703**	N.A.	N.A.	**3.183**	**303**	**100**

Source: SIAP, Ministry of Agriculture, Mexico.

Notes:
[1] No evaluation has been made of the quality of the data concerning productivity and prices. Productivity is given only for products with a set unit, such as rose, carnation, tuberosa, sea lavender, African lily and pom-pom chrysanthemums

[2] Only 30% of the total harvested amount of Marigold is considered here for ornamental use.

[3] Total harvested area, considering adjustment of 30% of Marigold.

[4] In several cases, different units (dozen, gross and ton) are given in the SIAP database for the same type of flower.

From the table (excluding total Marigold production) it appears that gladioli (35%), chrysanthemum (28%) and roses (12%) have the highest production value and "other cut flowers" 13%. The total value of cut flowers harvested in 2006 reached 303 million U.S. dollars.

2 1.5 Characteristics main producing states

On the basis of SIAP data the following table provides information concerning the regional distribution of cut flowers by type of flower.

AREA MAIN CUT FLOWERS BY STATE IN 2006 (hectares)

FLOWER TYPE	STATES								
	México	Puebla	Morelos	S.L. Potosí	Guerrero	Michoacán	Jalisco	Other	Total
Marigold	85	803	5	10	17	20	-	235	**1.175**
Marigold corr. [1]	26	241	2	3	5	6	-	70	**353**
Gladiolus	945	1.076	728	-	268	467	-	129	**3.613**
Chrysanthemum	2.355	43	58	-	-	-	-	6	**2.462**
Rose	475	62	394	-	-	12	21	134	**1.098**
Gypsophila	194	473	-	9	7	14	-	-	**697**
Carnation	712	-	-	-	-	-	-	-	**712**
Pom-pom chr.	2	-	1	-	-	-	-	-	**3**
Matthiola	131	305	-	-	-	-	-	3	**439**
Tuberosa	55	-	164	-	31	-	-	30	**280**
Sunflower	124	-	3	-	-	-	-	14	**141**
Sea Lavender	58	59	-	-	-	-	-	-	**117**
Bird of Paradise	92	-	1	-	-	108	6	-	**207**
Other	459	315	40	25	27	21	54	640	**1.581**
Total SIAP	**5.687**	**3.136**	**1.394**	**44**	**350**	**642**	**81**	**1.191**	**12.525**
Total corr. [2]	**5.628**	**2.574**	**1.391**	**37**	**338**	**628**	**81**	**1.026**	**11.703**

Source: Based on data SIAP (see annex 2.1.

Notes: [1] Only 30% of the total harvested amount of Marigold is considered here for ornamental use.

[2] Total harvested area, considering adjustment of 30% of Marigold.

On the basis of previous tables and discussions with specialists the following discription can be made of cut flower production in the most important states:

- The *State of Mexico* is the largest producer of cut flower in Mexico representing 48% of the total area in production in 2006. It grows a wide variety of flower species which perform well in its moderate climate. The main flower varieties are chrysanthemum, gladiolus, carnations and roses. Lilies are absent in these statistics, but also important. The State of Mexico also represents most of greenhouse grown cut flowers in the country, especially in the region Villa Guerrero. The distribution was originally destined to the Mexico City central market, the Central de Abastos. However, the development of local wholesale markets in Tenancingo and Villa Guerrero has changed this pattern. Also the larger growers have started selling directly to wholesalers and retailers across the nation. And because of their distribution position they also intermediate in the selling of products of third party growers. A number of companies are exporting to the United States and Canada, sometimes grouped together (see paragraph 2.6 and annex 1.4).

- *Puebla* has considerable production of gladiolus, gypsophilia and mattiola. Contrary to SIAP data, it has also been stated that there is a larger production of roses. Formerly most growers depended on intermediaries for distribution, but nowadays many growers sell their own products on the Mexico City Central de Abastos. Furthermore Puebla still represents a large share of open field production (around 98% of total production) of traditional species. Most open field products from Puebla are not

suitable for the international market and therefore and therefore almost all of them are sold at the Central de Abastos. The climate in the Atlixco region is very good for growing a wide range of flower species, although winter production is basically reserved for greenhouse production because of low night temperatures.

- *Morelos* has shown an increase in production in recent years. The slightly warmer climate is only suitable for a certain types of flower species. It concerns respectively gladiolus, roses and tube roses. Morelos continues to be of more importance for pot plants, bedding plants, shrubs and also young plant production.

- In *Baja California* (no SIAP data available) the stimulus for cut flower production has come from the large market that represents its neighbor state in the USA. The US state of California also houses the main cut flower production area in the USA. The main species are carnations, petunia (Petunia spp.), chrysanthemum, rose and geraniums (Geranium spp). Most of the production is exported (80%). Besides this, a range of field grown crops like wax flower and seed-crops like matthiola, larkspur (delphinium), lisianthus (eustoma spp.), etc. is produced. According to the local association there are several large companies between 20 and 300 hectares (see annex 2.5) producing mainly carnations in open air. According to the *Sistema Producto Flor de Baja California* there are 70 hectares of greenhouses for flower production in Baja California.

CLIMATIC CONDITIONS MAIN GROWING REGIONS

STATE	GROWING REGION	CLIMATE				
		Altitude (M)	Temperature[1] (C)			Rainfall (mm)
			Average	Max	Min	
Mexico	Tenancingo	2.022	18,3	27,3	9,3	1.189
	Villa Guerrero	2.022	18,3	27,3	9,3	1.189
	Ixtapan de la Sal	1.870	17,7	24,8	10,5	1.022
	Coatepec Harinas	2.265	16,1	22,8	9,4	1.139
Puebla	Atlixco	1.840	18	25,8	10,2	877
Morelos	Cuernavaca	1.560	21,8	28,3	15,4	1.249
	Cuautla	1.309	20	27,1	12,9	885
Baja California	Tijuana	0	17,9	25,9	10	336
Chiapas	Tapachula	800	22,6	27,1	18,1	4.275
Veracruz	Coatepec	1.252	19,2	25,8	12,6	1.703
	Cuichapa	648	22,1	28	16,1	2.582

Source: Servicio Meteorológico Nacional
Note: [1] Annual Average

- Also in the states of *Chiapas and Veracruz* a growing number of cut flower growers recognize the potential for flower species that can be grown successfully in their particular climates. The moderate temperatures and relative high humidity in Veracruz are ideal for growing flower species like anthurium. Also many cut foliage are grown like chamaedorea palm, leather leaf (arachniodes), tree fern etc. The climatic circumstances in Chiapas are even more humid and especially night temperatures are higher. Large areas of the state of Chiapas form the natural habitat of many tropical flowers and plants. In this type of climate tropical species like heliconia, gingers (Zingiber officinale Rose), cardamom (Elettaria cardamomum Maton), banana tree leaves (Musa cvs) and calathea thrive very well. Also many types of greens like cordyline (Cordyline spp.), dracaena (Draceaena spp.), palms (Palmaceae), calathea and dumbcane (Dieffenbachia Schott. sp.) are performing excellently.

For maps about types of climate, mountain rages and rainfall on a national base the annexes 1.3, 1.4 and 1.5 can be consulted.

CHARACTERISTICS OF FLOWER GROWERS FOR THE STATE OF MEXICO (2007)

SIZE PRODUCTION UNIT	GREENHOUSE	OPEN SKY	TOTAL
Small [1]	55%	76%	76%
Medium [2]	25%	16%	15%
Large [3]	20%	8%	9%
TOTAL	100%	100%	100%
All categories	N.A. [4]	N.A.	100%

Source: The Mexican Cut Flower Market, Rabobank 2000, updated by the CMF.

Notes: [1] Less than 0.5 hectares
[2] Between 0.5 and 10 hectares
[3] Larger than 10 hectares
[4] Not Applicable

The increase of the production area in recent years is mainly caused by the increase of medium greenhouse operations according to the CMF. The number of growers representing this group (0.5 – 1 hectares) has grown with 8% during the last eight years. They mostly grow popular varieties like chrysanthemum, roses, gladioli, alstroemeria, gerbera and lilies.

2.1.6 The major producers

In annex 2.2 the major producers of cut flowers market are listed. These companies vary in size from 5 hectares to more than 300 hectares. For more information about the major flower producers the internet sites of these companies can be consulted.

Coxflor is the most important player in the Mexican cut flower industry. It is a family owned company operating in Villa Guerrero and surroundings. Coxflor mainly produces high quality lilies, roses and gladioli under at least 40 hectares of greenhouses divided over 7 locations. It introduced lilies in Mexico and still is the market leader in lily production although other producers started producing more and more lilies. Around 60% of their total production is exported to the United States and 40%, mainly lower quality flowers, is sold nationally. It is the major exporter in Mexico. Besides bulbs, Coxflor also is importing parts of their machinery and technology from the Netherlands; the (plastic) greenhouses are mainly coming from France. The company has continually grown during the last years by purchasing other companies, like El Volcan, and it is expected to continue to do so in the coming years.

Flores de Chiltepec is the second important player in the flower industry. It started operations in 1993 in the region Coatepec Harinas in the State of Mexico. Nowadays it also has a production location in Veracruz. The company grows different varieties of which roses, lilies, gerbera, alstroemeria and anthurium are the most important. Flores de Chiltepec started with three hectares in production and it grew slowly to at least 20 hectares of greenhouses in the State of Mexico and at least 5 hectares in Veracruz at the moment of writing this report. The company is generally known for their high quality flowers which are sold in almost every high quality flower shop throughout Mexico.

As mentioned before, there are some producers who work together as a group. A few years ago a group of seven companies grouped together to sell and service U.S. wholesale and mass market accounts. These seven companies grouped together because they have consistency in quality, pricing and enough quantity to service large accounts in the United States (Produce News, January 10th, 2005). These companies are *Viveros el Volcan, Rancho La Era, Rancho Los Oyameles, Flores de Chiltepec, Coxflor, Flores de San Francisco and Rancho Santo Tomás.* It is estimated that this group of producers represent around 70% of the national flower exports.

2.1.7 Level of technology

The major exporters of ornamental products, mainly cut flowers, (annex 1.8) are also the producers which grow under greenhouse conditions and represent the highest level of technology while the open field production systems supply flowers for the domestic market with a lower level of technology. Although it should be mentioned that certain flowers for the export market can be grown under open field conditions.

As mentioned in paragraph 1.1 the main Mexican producing states are located near Mexico City. Most flower producing states, except parts of Chiapas and Baja California, lie between 1000 and 2400 meters. Here the climatic conditions, cool nights and warm days, are excellent to grow flowers in lower cost greenhouses. Flower production is carried out under a wide range of technologies that vary from the open field systems on mainly small farms to the greenhouse type conditions that allow for export quality. According to the CMF only 8% of the total production is grown under greenhouse type conditions at the national level, the rest (92%) under open field conditions.

Growers usually use steel greenhouse constructions with plastic covering. In general they have the possibility to open the side and top vents. Only a few growers use a type of climate control. These are mostly heaters against frost. The irrigation system is mostly centralized and

sometimes computerized. They mostly grow roses, alstroemeria, Transvaal daisy, lily and other species.

PRODUCTIVITY PER TYPE OF CUT FLOWER (2008; Hectares)

TYPE OF FLOWER	GREENHOUSE	OPEN SKY	AVERAGE
	Stems*1000	Stems*1000	Stem*1000
Gladioli [1]	N.A. [3]	450	450
Chrysanthemum [2]	1.000	800	900
Roses	800	600	700
Carnations	2.000	1.500	1.750
Gerbera	1.450	N.A.	1.450
Lilies [1]	800	800	800

Source: Mexican Flower Council (CMF)

Note: [1] With 2 cycles per year

[2] With 2.5 cycle per year for open sky, tunnels and 3 cycles a year in greenhouses.

[3] Not available

The majority of greenhouse growers use self-made greenhouses with steel structure, mainly a tunnel-shape or Venlo-structure, with or without ventilation. Irrigation is often done with a hose, fertilization by hand. Recently the first climate controlled poly greenhouses have been constructed. Results are very promising and it is expected that export-oriented growers will continue to invest in these greenhouses.

The average price of one hectare of greenhouse is about USD 120.000 according to the CMF, irrigation and constructing included. Small family-run flower farms can obtain subsidies from the state government up to 50% of the investment in greenhouses, equipment and buildings.

Many growers grow in the open field where irrigation and fertilization is done by hand. These are mainly the growers of gladioli, standard and spray carnations, agapanthus (Agapanthus spp.), tuberose (Polianthes tuberosa) and birds of paradise (Strelitzia reginae Ait.). And also traditional crops like African marigold (Tagetes spp.), gypsophila (Gypsophila spp.) and matthiola (Matthiola incana R.). There are some growers that use volcanic substrate, for example for the production of gerbera and carnations.

2. 1.8 Competitive position

The Mexican production of cut flowers competes on the US market with other producers, such as Colombia, Ecuador, Costa Rica, Canada and the Netherlands. In annex 2.4 estimates of some important parameters of competiveness are presented. Mexico results from these data as good in relation to natural conditions and transport costs as well as production costs. The country classifies, compared to its competitors poor for quality, reliability, credit costs, network and government support.

In annex 2.5 one of the many available analyses is given of the strengths, weaknesses, opportunities and threats (“SWOT”) for the cut flower sector.

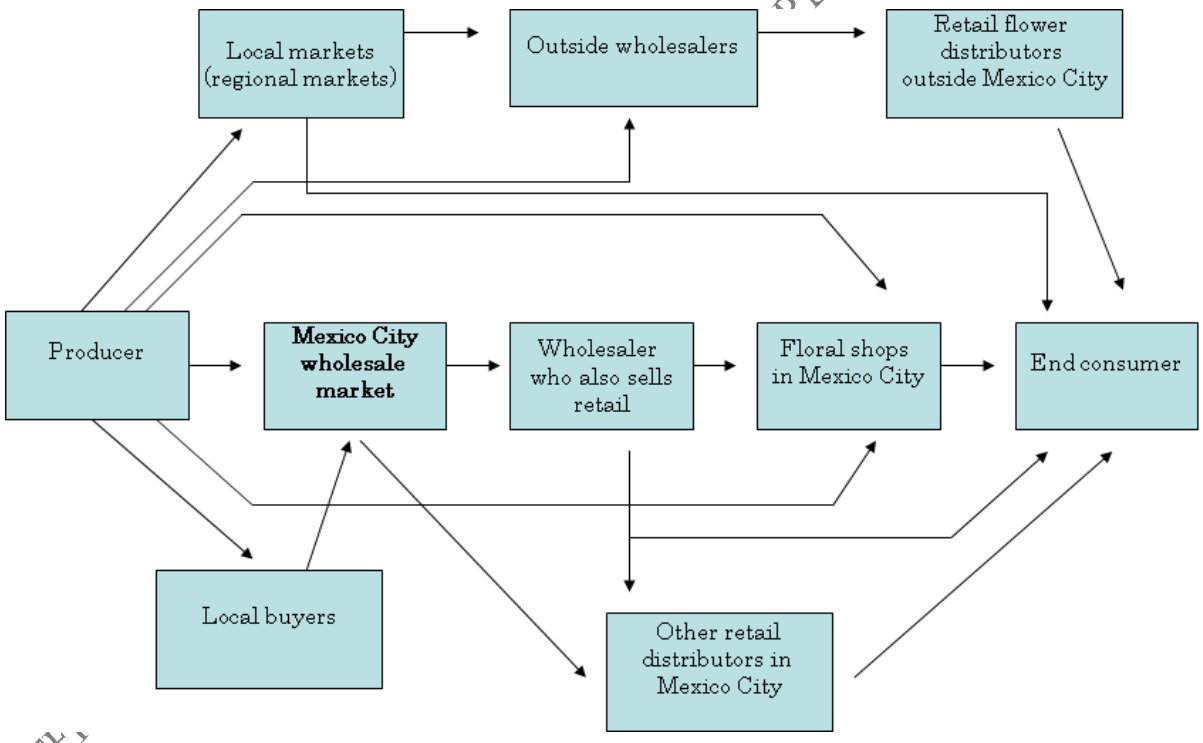
2.2 Structure

2.2.1 Distribution system

As pointed out before 90% of national production is destined to the domestic market, mainly centralized in Mexico City, Guadalajara and Monterrey. According to the Secretary of Agricultural Development of the State of Mexico 55% of national production is commercialized through the Mexico City market, 20% through the Tenancingo market, 10% through the Jamaica market and 15% is sold directly to distributors throughout the country.

Recently the new market, FLORACOPIO, close to the main flower production area,Villa Guererro, has started operations. This wholesale market has been established in a former distribution center of the supermarket chain Wal-Mart. It is owned by producers and expected to become an important market.

DISTRIBUTION CHANNELS FOR THE NATIONAL FLOWER MARKET



Source: The Mexican Cut Flower Market, Rabobank Mexico 2000.

Cut flowers are distributed through a fine and fragmented system of intermediaries, distributors, wholesalers, retailers and street sales men (see the above figure). Also the growers themselves often play a major role. The following steps in flower distribution can be distinguished:

- *The producer*, in particular the many smaller ones, depend on intermediaries that collect the production at their farms a few times per week. Producers often are in

contact with several intermediaries. Prices are negotiated on a daily basis, sometimes by phone before the buyer comes to pick them up. Larger growers often use the intermediary, but only for a small share of their business. They often attend a series of clients direct by phone, also in the US and Canada. These clients can either be wholesalers or retailers all over the country. They ship directly to these customers mainly using road, but also air transport. Another group of growers, particularly producers without a strong local wholesale market (like producers from Puebla) go to (mainly) the Mexico City Central de Abastos to sell their product personally.

The latest development is that producers are working together as a group; for example *Unión Productores de Flores Los Morales* that includes 14 producers which represent all together around 100 hectares of greenhouses. They arrange their own transport, individually set prices for their products and ship them to a sales outlet (owned by the growers) in the particular wholesale market. In this way they achieve economies of scale and have direct influence on their marketing. Some larger growers have gone as far as directly servicing supermarket chains. The largest national chains are almost exclusively serviced by the larger growers. These growers not only sell their own product, but also buy from third party growers. They often have special facilities to turn the different types of flowers into arrangements and bouquets.

- *The intermediary.* The most common way the intermediary works is by buying the flowers from a series of small producers and sell them on either a local wholesale market (like Tenancingo or Villa Guerrero in the State of Mexico) or the main flower market at the Central de Abastos in Mexico City. The Central de Abastos is still a main focus for all parties involved in the flower business. It is the main concentration of product from all the main flower growing regions (except Baja California) and prices are set here for most flower species and qualities. At the wholesale markets cut flowers are re-sold to other intermediaries, wholesalers from all over the nation and local retailers. The intermediaries that buy on particularly the Central de Abastos often re-sell their flowers to regional wholesalers in a certain part of the country.

- *The wholesaler* buys his flowers at the Central de Abastos, regional markets and direct from growers. Larger wholesalers send their trucks to pick up products from growers in the main flower production areas and wholesale markets before returning to their home city. They sell the flowers to local retailers and street sellers. Sometimes they also service retail chains.

  Cut flowers are still predominantly sold at flower shops, flower stands and street markets. Flower sales at chains of supermarkets and convenience stores become more important and sales through the internet are also increasing. Although no figures are available it is generally assumed that the traditional outlets are not suffering drops in sales because of new outlets entering the market. Total growth of flower consumption is such that the market offers room for new outlets and ways of selling. There are no figures of the shares of the various outlets.

  Flower sales through supermarkets and convenience stores are not without problems. None of the chains count with central distribution; most stores have to be individually supplied and serviced by the provider. Also in-store training and presentation is often the responsibility of the provider. The chains are not very active in the development of the concept and predominantly leave it to the provider. As the provider has no

experience either it is often a process of trial and error. It is therefore expected that flower sales concepts in the supermarkets will only develop slowly.

2.2.2 Quality

The Mexican flower industry has no official quality standards. Nevertheless producers obviously use certain standards for their flowers. In general the following quality standards are used:

- Export quality: the highest standard for cut flowers. Exporting growers often split up their export quality in 2 grades, the A-grade for export and B-grade for the national market
- Standard quality: second grade for most types of flowers
- National quality: third grade quality for some types of flowers

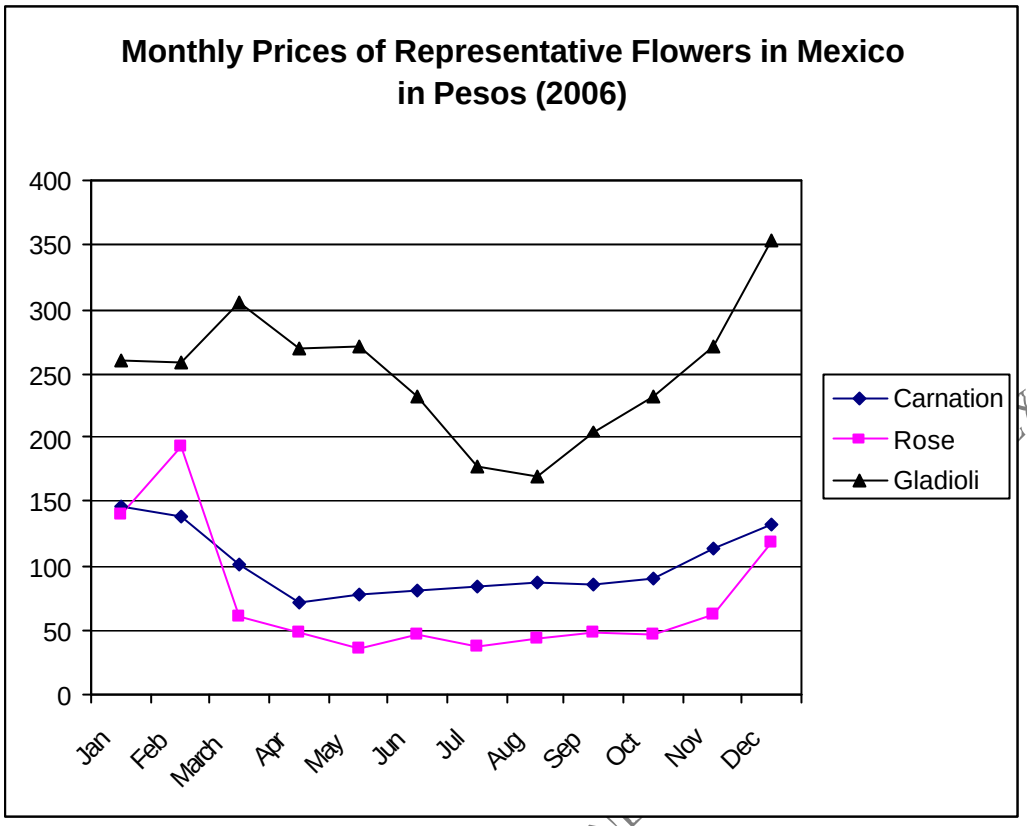
With regard to the export grading Mexican growers follow the Colombian standards which are widely accepted in the US and Canada.

2.2.3 Price formation

The Mexican flower market has no specific instrument or institution to set prices. The main indicator is Mexico City's main wholesale market, the Central de Abastos. This wholesale market is the main place for both food and non food agricultural products, including flowers, foliage and plants. Here the largest concentration of cut flowers is marketed under very bad logistic and post harvest circumstances. Large amounts of flowers from all main production areas in central Mexico are sold through intermediaries at this huge wholesale market, one of the biggest in the world. These intermediaries therefore have thorough knowledge of supply and demand. They are the most influential factor in setting prices. But it is also the main market place for the quality levels 'medium to bad'. This influences the price level of the Mexican market as a whole. Only a few well known producers of good quality and with their own distribution structure can escape this poor price forming structure.

Many wholesalers and growers arrive at the Central de Abastos around 18.00 p.m. on the day before the selling day. By talking to their colleagues and looking around how big the supply is they have a fairly good impression about what prices might be feasible the next morning. The sales at the Central de Abastos start at 3-4 a.m. Of course the quality of the various producers is generally known. This also has influence on the price level. Some large growers on the Central de Abastos can influence the price of certain species or qualities. These growers represent a large share of production of a certain specie or quality and often set the price for other growers and intermediaries.

There is no independent quality control and boxes of well known producers are used by other producers in their efforts to get the best possible price. Only in supermarket and convenience store certain fixed price levels are set for specific periods. They are not directly influenced by the daily market prices.



Source: Office of the Agricultural Counselor; based on data from SIAP (Sistema National de Información e Integración de Mercados (SNIIM)
Note: Prices in Mexican Pesos per unit

Flower prices show a seasonal variation. The prices respond to changes in demand. In general the price level tends to be higher towards the end of the year (see above figure) when international and domestic demand increases. December is an important month for Mexico in flower consumption on the one hand for the Christmas holiday season but on the other hand for the celebration of the Virgin of Guadelupe on December 12. Roses and gladiolas follow the same trend throughout the year. These two varieties spike upwards in February reflecting the demand associated with Valentine's Day.

Flowers are sold by volume. The most common units on the wholesale level are the gross *(gruesa)* which refers to 144 stems, the bundle *(manojo)* which varies between 12 to 15 stems and the bunch of 25 stems.

In annex 2.2 graphs of the long term price development (2000-2007) of the four main cut flowers are presented; roses, carnations, gladiola and chrysanthemum.
In these graphs the annual variation in price can also be noticed for each of the type of cut flowers. It would appear from these graphs that the seasonal variation in prices is rather high, especially the upswings.

Annex 2.2 also presents two kinds of prices. The nominal prices; those registered as actual prices. And real prices; nominal prices corrected for inflation. Nominal prices were provided by the Ministry of Economy. In order to correct for inflation, a deflator was applied (see annex 1.2).

The graphs show that:

- nominal prices increased for all types of flowers; on average on an annual basis for roses with 2%, carnations 10%, gladiola 7% and chrysanthemum 4%.
- real prices showed an average yearly decline for roses of -3% and for chrysanthemum of -1 %. The real prices increased with 5% for carnations and with 2% for gladiola.

Comparing the development of the area by type of flowers in the period 2001-2006 with the development of the real prices shows hardly any correlation. This can possibly be explained by the fact that factors affecting production costs, such as relative need for labour, as well as diseases played an important role in the choice of producers as to types of flowers.

2.2.4 Transport

Most flowers are transported by road. All types of vehicles are used, from the trunk of a car (often a taxi) to a pick-up truck, small trucks (sometimes refrigerated) to large trucks and refrigerated trailers. Fortunately larger growers and distributors have started to use temperature controlled trucks and have significantly improved the quality of the product. Smaller shipments are also sent by plane, mostly using courier services. These services often include pick-up from the farm and delivery at the door of the final customer. The cost of this service however is fairly high.

Since 2000 there also is a system of transport of cut flowers by bus. Mexico has an excellent and reliable bus system that virtually covers the whole Mexican territory. The cut flower transport service is called Omnicarga and the transport prices are competitive. The service is in particular used by mid-size producers to deliver cut flowers in the central part of the country. Flowers to be sent to Monterrey will arrive there before noon the day after the producers delivers the shipment at the bus station (before 16.00 hrs). The freight compartment of the busses is not temperature controlled.

For destinations requiring less volume one uses air transport or country wide services offered by coach companies. For example Omnibus picks up shipments at the growers in Mexico State with small trucks and delivers them to the central bus stations in Mexico City. From here they are shipped by coach to all mayor destinations in the country. This type of transport is cheaper than air transport, but also more time consuming. It is not temperature controlled, although Mexico has the most modern trucks with control of temperature for export. The airport of Mexico Cityalso has ample cooling facilities.

The export market is dominated by a small number of large companies. They do generally have cooling facilities at their farms. Facilities at these farms often include a refrigerated reception area for the harvested flowers and cold stores for finished product. They export most of their flowers by truck.

TRANSPORTATION COSTS FROM MEXICO CITY (US Cents per stem)

DESTINATION	TRUCK[1]	AIR
San Francisco	2	9
Los Angeles	1,9	8,5
Houston	1,7	9
Chicago	2,1	10
San Antonio	1,4	12
Vancouver	3,5	12
Monterrey	0,8	8
Tijuana	1,5	10
Chihuahua	1,4	10
Guadalajara	0,8	6

Source: Florexpress México, Gilberto Rendon
Note: [1] Full truck, 43 foot.

The transport costs from Villa Guerrero, the main production area, to Monterrey of a standard box of roses cost approximately EUR 12.50 according to producers that use this system. Its share of all means of transport is about 10%.

The larger growers are often involved in distribution themselves. Some of them own wholesale outlets in the larger cities throughout the country. These outlets are often supplied using refrigerated trailer or truck transport. Obviously this means of transport can only be used in case of sufficient volume.

In general it can be said that only the most resistant flower species (chrysanthemum, carnation, gladioli, etc.) survive this kind of handling process and still provide for some vase life. Most new species to Mexico however require more strict handling procedures and are therefore not an option for most growers.

2.2.5 Labor costs

Workers' rights are very well protected in Mexico. The Federal Labour Law regulates contracts, minimum wages, hours of work, legal holidays and paid vacations. It also contains issues like working conditions, trade unions, strikes and dismissal compensation. The Mexican social security system provides for medical and maternity care for all workers. Unemployment rate in Mexico is relatively low (< 4%), also because a significant percentage of the workforce (40-50%) works in the so-called informal sector and is not registered for tax and social security purposes.

Overall most companies find plentiful unskilled labour at a competitive cost; skilled labour however can be in short supply. The Mexican workforce is young, highly trainable and providing fairly high productivity. Top-level executives are in short supply and therefore expensive.

Most cut flower and pot plant farms recruit their staff at the farm gate. Availability of workers on the countryside varies significantly according to demand. In concentrated areas of flower

production in the State of Mexico for example demand often exceeds supply, especially before the typical flower holidays like Valentine and Mother's Day. In other rural areas availability might be limited because large shares of mostly male workers have chosen to go to work in the US.

A regular working week consists of six eight-hour days and one day of rest with full pay. Overtime is paid at twice the normal rate. Workers receive a 25% premium for Sunday work. The legal maximum working week, not considering overtime, is 48 hours. There is no working-week distinction between men and women, although women are entitled to 12 weeks maternity leave and other maternity benefits.

National minimum wages are set every year. For 2007 minimum wages vary, according to the region, between MEX$ 47.60 and MEX$ 50.57 per day. On top of the salary companies have to pay benefits like pensions/*afore* (2%), social insurance (15% for the employer) and National Workers Housing Institute/*Infonavit* (5%). Workers are also entitled to a profit-sharing benefit; 10% of pre-tax profit must be distributed amongst employees. Besides workers receive a minimum of 7 days paid holiday annually, increased by two days for every subsequent 3 years. At the end of the year workers receive an obligatory Christmas bonus (aguinaldo) of 15 day's pay for a full year of work.

Unless dismissed for cause (such as dishonesty, disrespect or absenteeism), laid-off employees are entitled to three months' pay, plus 20 days' additional pay for every year employed. All together, the labour cost for an employer amounts on a daily basis to 118 pesos (7.60 euro) for unskilled labour. For the level of a supervisor this is about 190 pesos (12.20 euro).

3 POT PLANTS

3.1 Production

3.1.1 Introduction

Official statistical information for pot plants is very deficient. The available data from SIAP are presented here, but the real production is considerably higher than indicated. The definition of pot plants, as a basis for presenting the SIAP data is presented in annex 1.13 and the statistics in annex 3.1.

The definition of the species by SIAP does not mention important plants and fillers such as : bougainvillea, poinsettia, spathiphylluma (cuna de Moises) although there is a general category "other ornamental plants" (see annex 1.13).

Only for the state of Morelos a correction of these data was possible based on consultation of other sources. This correction concerned possibly a factor 12-13!
For the other states the weakness of the statistics was confirmed by comparing these with the list of main producers per state (annex 3.1). It results that these main producers alone are double the area in the official statistics for Veracruz and also exceed the official figures for Jalisco. For the states without SIAP data the main producers in Chiapas, Colima and Tabasco reach more than 180 hectares.

3.1.2 Regional concentration

Potplants are a substantial part of the Mexican ornamental industry but until now no report on the Mexican ornamental sector analyzed this sub sector.

The statistical figures about the ornamental plants sector apply mainly to states with a considerable share of the national production. In the following table the main states are mentioned. Official figures from the SIAP conclude that approximately 1.753 hectares pot-plants were harvested in 2006. The most important types of potplants based on these not so reliable data are (see annex 3.1): Chamaedorea Palm (47%), Euphorbia (11%), Plectranthus (dollar) (4%), Fern (2%).

Based on the statistics presented by SIAP, San Luis Potosí (41%) and Puebla (28%) showed the highest potplant production in 2006. However, Morelos (with only a 3% share in 2006, based on SIAP data), is considered a very important potplant supplier in Mexico. Besides these states there are several other states, like the State of Mexico, Chiapas, Colima and Distrito Federal who are increasing their potplant production. Especially Colima is growing in importance. Also Jalisco is an important producing state but there are no data available on this state.

The potplant industry is, in contrast to the cut flower industry, widespread throughout the country. Almost any Mexican state has some production of potplants. Unfortunately no exact data of these data could be found. It is generally presumed that Michoacan, Veracruz, Oaxaca and Guerrero represent a major part of the rest of the production area.

AREA PRODUCTION POTPLANTS[1] PER STATE (Hectares)

STATE	2001		2002		2003		2004		2005		2006		
	Has	%	Has	%	Has	%	Has	%	Has	%	Has	%	(%) [3]
San Luis Potosí	299	31	299	26	299	33	723	45	723	44	722 (700) [4]	41	(17)
Puebla	485	50	485	42	485	53	487	30	487	30	497 (500)	28	(12)
México	92	10	285	25	87	9	103	6	117	7	137 (400)	8	(10)
Distrito Federal	58	6	61	5	25	3	104	6	111	7	114 (200)	7	(5)
Veracruz	-	-	-	-	-	-	80	5	85	5	105 (100)	6	(2)
Michoacán	-	-	-	-	-	-	-	-	6	0	80 (100)	5	(2)
Morelos	5	1	-	-	-	-	75	5	69	4	68 (800)	4	(20)
Jalisco	-	-	-	-	-	-	-	-	30	2	30 (100)	2	(2)
Guerrero	-	-	-	-	-	-	-	-	-		- (50)	-	(1)
Baja California	22	2	22	2	20	2	21	1		-	- (50)	-	(1)
Other states [2]	-	-	-	-	-	-	18	1	-	-	- (1100)	-	(27)
TOTAL SIAP	**961**	100	**1.152**	100	**916**	100	**1.611**	100	**1.628**	100	**1.753 (4100)**	100	(100)
TOTAL Corr. [3]											**4.100**		

Source: Based on data SIAP (see annex 3.1)

Notes: [1] Also includes potted foliage and parts of trees.

[2] Information of other potplant producing states such as Chiapas is not available through SIAP.

[3] The correction (in between parenthesis) is a rough "GUESTIMATE", based on the likely area in Morelos (800 has), Mexico (400 has), D.F. (200 has), Jalisco (300 has) and for any other state on average at least 50 has. Sums up to some 4000 has.

In San Luis Potosi there is, according to SIAP data (see annex 3.1) only a large production of Chamaedrea Palm; more than 700 hectares. It concerns a production based mainly on management of plants that for a large part grow spontaneously in nature.

In Puebla production is located in two regions being Atlixco, in the centre of the state, and Huauchinango (also Tenango de las Flores) in the northern part of Puebla. There are an estimated 200 producers. Atlixco is an important producing area for poinsettia (euphorbia pulcherrima).

Morelos is not an important producing state with a production of only 68 hectares according to SIAP. However, other data indicate a completely different magnitude of production.
The POMAC, association of ornamental plant growers in Morelos, indicates that there are an estimated 3.000 producers, including those of cut flowers. A study by INIFAP, the National Institute of Agricultural Research from 2001 results in an average size of a potplant production unit of 0.75 hectare. In case that is also the size of a cut flower farm, the total area under ornamentals would be 2250 hectares. SIAP data give for Morelos for cut flowers some 1400 hectares (POMAC maintains 500 has). From this can be derived that the area under pot-plants would be some 850 has (using the POMAC data for cut flowers, the area under pot-plants would reach 1750 has).

The Distrito Federal (Mexico City) is another important producing state. According to the Guia Verde there are around 2.500 producers with very small plots. The most important area is Xochimilco. There are more than 300 varieties cultivated in this state.

In the above table a "GUESTIMATE" is provided for the national area under potplants. In stead of the SIAP figure of 1753 hectares in 2006, we put forward as a hypothesis that this might be some 4000 (4100) hectares.

As to the production value potplants only a hypothesis is possible. If the area under potplants (and foliage) amounts to 4.100 hectares and in case the value per hectare would be equal to that of cut flowers, the value would be some 1.100 million pesos or USD 110.million

3.1.3 Characteristics main producing states

The national oriented production of ornamental plants is mainly situated in 4 areas:

- Morelos:
  Cuautla; open field, shade halls, large assortment
  Xiltepec: more technified, better quality
  Tetela: increasing in area, reasonable quality
  Numerous small areas divided all over state (Cuernavaca, Yautepec, Emiliano Zapata).

  The average production unit in Morelos amounts to 0.75 has. It is slightly larger when only open field (60% of the area) and some 0.4 has when under cover (25% of the area). Mixed farms (15 % of the area) have area of on average about 1.1 has.
  The main plants produced are (ref INIFAP): bougainvillea (40%), poinsettia (6%), spathiphyllum (cuna de Moises) (10%).
  The estimated production per hectare in Morelos is 300.000 – 350.000 plants annually and with a value at production level of USD 120.000 – USD 150.000. The value of sales at the level of producer varies from USD 50.000 – 120.000 per ha per year. This production is carried out with a relatively short production cycle of about 3 months, mainly grown in greenhouses. It concerns mainly flowering potplants like petunia, pot chrysanthemums, cyclamen, begonia and dianthus. On a smaller scale producers from Morelos grow anthurium, several species of orchids and bromelicaea. The assortment exists of more than 300 species, such as hibiscus, cedars, garden roses, bougainvillea, pittosporum, and several species of palms, ficus, cupressus, viburnum and a large assortment of other conifers, shrubs and ornamental grasses. It has to be emphasized that there is no difference in statistics in Mexico between outdoor and indoor plants, but only in flowering plants, foliage plants and bedding plants.

- State of Mexico:
  Atlacomulco: strong growth, also introduction of technology, currently most advanced growers with best quality. On average some 0.5 has but also large growers.

- Puebla:
  Atlixco, stable, no innovation
  Tenango de las Flores

- Distrito Federal:
  Xochimilco, Mexico City: traditional growing area, old fashioned, lowest quality, decreasing, touristic area, the garden centre for Mexico City

3.1.4 Level of technology

In Morelos some 60% of total production is grown in the open field, 25 % under shade nets or plastic greenhouses and 15% is mixed. In the State of Mexico 6% is grown in the open field, 53% under shade nets or greenhouses and 41% is mixed.

CHARACTERISTICS POTPLANT GROWERS (2001)

STATE	ITEM	UNDER COVER[1]	OPEN FIELD	MIXED
Morelos	Percentage (%)	25	16	15
	Average size (ha)	0,4	0,8	UC[2]: 0,4 OF[3]: 0,7
	Cultivated varieties	Poinsettia (15%) Chrysanthemum (20%) Bougainvillea(65%)	Bougainvillea (40%) Ceder (10%) Citrus (50%)	Poinsettia (13%) Impacient (20%) Spathiphylluma (67%)
Mexico	Percentage (%)	53	6	41
	Average size	0,2	0,75	UC: 0,2 OF: 0,8
	Cultivated varieties	Lilies Impacient Cyclamen	Rose	Poinsettia Impacient Spathiphylluma

Source: Fundación Produce Morelos. Instituto Nacional de Investigaciones (INIFAP)
Notes: 1. Includes mesh shadow and plastic greenhouses.
2. UC = under cover
3. OF = open field

Less than 300 ha of greenhouses in the state of Morelos use a certain level of technology like automatic irrigation or fertilization. It is mainly applied in greenhouses for propagation. Suppliers and producers of basic plant material have all equipment that is required to guarantee a certain level of reliability of supply. Pat and fan systems are wide spread amongst the propagators of parental material. Most other greenhouses are locally built and do not use any technology. In this respect it is clear that most of the outdoor products do not need very sophisticated irrigation and fertilization.

Grower's organizations like CONAPLOR have initiated programs to stimulate the introduction of new technology and improve crop performances. POMAC, the association of ornamental plant growers in Morelos, also organizes trips abroad to familiarize the growers with different growing areas and techniques.

To support investments in a.o. new technology POMAC has set up a financing entity the 'Parafinanciera POMAC' for its member growers. Its' credits are granted based on an analysis of the project and the approval of the credit committee. They also planned to set up a factoring scheme to finance outstanding accounts.

Growers of bedding plants in Atlacomulco have better, closed greenhouses and produce much better quality.

3.2. Structure

3.2.1 Commercial structure

In the mid nineties a group of growers in Morelos joined forces to strengthen their sales and distribution and established what they call a 'comercializadora'. They joined their sales by contracting a sales person who could offer a wider assortment and larger quantities of certain species. Lots of growers have followed their example and are currently associated with a 'comercializadora'. They have become better partners for their customers throughout Mexico, because their customers can obtain a much bigger assortment on one spot. An other advantage is the increased transparency of the market. Most important 'Comercializadoras':

- Ornamentales de Cuautla: 13 members and 15 suppliers, 45 ha production
- La Palma: 9 members, 5 ha production
- Agromar: 10 members and 15 suppliers, 25 ha production
- Floracuautla: 11 members and 10 suppliers, 35 ha production

3.2.2 Distribution system

The Xochimilco market in Mexico City is one of the main distribution channels. The ornamental plants market in Xochimilco exists of some streets in the far south/south-east of the city where individual wholesalers sell to landscapers, garden centers and, in the weekend, to consumers. Xochimilco has become a well-known tourist attraction, where tourists can rent a boat to make a trip through the canals of Xochimilco and visit garden centers that are situated along the canals. There is a striking resemblance with the geographical structure of Boskoop, the center of the nursery business in The Netherlands, with its canals, long and narrow pieces of land and the means of transport, the flat-bottomed boats. Ornamental plants are mainly sold and distributed through the following channels:

- 30-35%: Distributors at the Xochimilco-markets in Mexico City;
- 40-45%: Direct sales to wholesalers with country-wide sales;
- 5%: Landscapers;
- 10%: Retailers like Home Depot and Walmart;
- Rest: Re-sellers that mostly sell on at traditional markets in the neighborhood.

Some interest has come up to investigate export possibilities but so far no concrete initiatives have been taken. Export of consumer ready garden products is very minor to non-existent.

3.2.3 Co-operation and integration

Most recent initiative to join forces is the establishment of the *Concentradora Nacional de Plantas Ornamentales* (CONAPLOR), a centrally organized growers market with a cash & carry-system with currently 87 members of which a smaller part are really active selling through this system. CONAPLOR concentrates saleable products from its member growers in an attractive location, offers consolidation and distribution services to its wholesale clients,

organizes sales and administration and opens up to consumers mainly during weekends. There is a striking resemblance, both in system as in organization with initiatives in The Netherlands like the cash & carry center for nursery stock in Boskoop, part of the largest flower auction in the world, FloraHolland.

Each member has a plot within or outside the greenhouse to exhibit his products. Saleable products are given on consignment to CONAPLOR with a selling price determined by the grower. The grower pays a monthly service fee of 1.800 pesos (EUR 145) to CONAPLOR regardless his product has been sold or not. CONAPLOR has implemented a wireless cashier system.

CONAPLOR also maintains contacts with breeders, mediates in the acquisition of new varieties and will start activities to develop its own varieties of plants. The Central de Abastos, the central wholesale market in Mexico City also serves as outlet, especially for products like poinsettia and seasonal products. This outlet is also used when sales in other markets is not possible.

The new co-operative is interested in export of their products. Currently there is only some export of beaucarnea recurvata to The Netherlands. Apart from the federal trade and export statistics, there are no specified trade statistics available per species. CONAPLOR itself has no plans for export, if so, export will be an individual business by certain member producers.

An example of forward integration is the consumer's plant production unit of a major plant producer in Mexico. This company recognized the potential of the Mexican market for finished pot plants with added value and organized distribution. It therefore established a business unit for retail production and sales. Today this retail unit is 5 hectares of production of consumer products, beside 27 hectares for basic plant material.

The objective of this new business unit is direct sales with added value to retail chains like Home Depot. Currently there are 25 different species in production with a, for Mexican standards, strict policy on quality, service and distribution capacity. The company is also sourcing with other producers (about 45%) and is specializing its own production in order to cut costs and improve quality. There are only few companies that understand the current need for integrated supply chain management, distribution through multiple outlets, consistent quality, presentation and added value and demand oriented production. Because of its scale only few potted plant production companies are able to take action individually and build up a position in this market.

3.2.4 Quality

Larger production companies in Morelos are rather price focused and produce a regular quality. Only some smaller specialized farms focus more on quality and receive higher prices on the market. What also applies for the cut flower market, there appears to be a market for high quality products and the customers are willing to pay a higher price.

In new production locations like Atlixco, Colima and Atlacomulco (bedding plants) quality seems of more importance. The yearly increase in production of ornamentals is estimated at 5-8%. Most growers are mainly focused on increase of turnover, not on improvement of quality. Prices are not increasing as much as costs; to compensate income most growers simply increase their growing area.

4 TRADE IN THE ORNAMENTAL SECTOR

4.1.1 Cut flowers

4.1.1.1 Export

The Mexican export as well as the import of ornamental products is relatively small compared to the estimated production value of approximately USD 387 mln. Considering the purposes of the report, Mexican exports will be given in USD and Mexican imports in EUR.

Main trade partner is the United States with over 98% share in export destination of Mexican cut flowers and 55% share of imports of ornamentals (foliage and live plants). Of the specific types of flowers, roses occupy the first place followed by gladiolus, gerbera and bird of paradise (see table).

EXPORT ORNAMENTALS ALL DESTINATIONS (USD 1000)

CODE[1]	FLOWERS/PLANTS	YEAR					
		1996	**1998**	**2000**	**2002**	**2004**	**2006**
		USD	USD	USD	USD	USD	USD
06031013	Other flowers[2]	0	0	0	3.989	7.117	32.455
06031006	Rose	13.726	11.480	10.938	7.278	3.632	3.513
06031099	Other	4.878	6.489	9.930	4.982	1.023	2.046
06031001	Gladiola	1.128	2.007	1.821	3.708	2.347	1.989
06031009	Gerbera	328	444	542	571	635	1.593
06031012	Bird of paradise	704	901	1.146	1.127	1.155	1.230
06031008	Statice	1.170	1.202	1.491	1.451	679	845
06031003	Carnation	906	671	559	402	262	640
06031010	Daisies	3	27	66	205	150	342
06031007	Gypsophila	182	11	74	142	73	116.
06031004	Chrysanthemum	2	0	0	9	9	30
06031011	Anthurium	5	6	2	0	12	8
06031005	Pom-Pom Chrysan	61	12	0	1	0	1
06031000	Fresh	1	0	0	0	0	0
06031002	Orchid	5	6	2	1	0	0
Subtotal	**Fresh flowers**	**23.098**	**23.255**	**26.571**	**23.866**	**17.095**	**44.852**
Subtotal, 060390	**Prepared, dried**	**2.234**	**2.769**	**5.310**	**3.971**	**3.177**	**2.920**
Total, 0603	**Cut flowers**	**25.352**	**26.024**	**31.881**	**27.837**	**20.272**	**47.772**
060491	Foliage or leaves	3.799	6.940	7.549	9.392	9.483	11.687
060499	Foliage or leaves	1.216	4.020	2.259	1.944	1.963	3.609
Subtotal	**Foliage or leaves**	**5.015**	**10.960**	**9.808**	**11.336**	**11.446**	**15.296**
Subtotal, 0601	**Bulbs**	**44**	**8**	**36**	**35**	**16**	**619**
060210	Unrooted Cuttings	4.341	7.345	9.702	9.340	9.437	10.375
060290	Live plant, cut, slippings	446	657	709	769	1.230	1.736

060240	Roses	42	0	1	5	820	619
060220	Fruit/nut tree	27	76	1	16	10	90
Subtotal, 0602	**Live plants**	**4.856**	**8.078**	**10.413**	**10.130**	**11.497**	**12.820**
TOTAL	**ORNAMENTAL PRODUCTS[3]**	**35.247**	**45.142**	**52.138**	**49.338**	**43.231**	**76.507**

Source: World Trade Atlas, Secretariat of Economy

Notes: [1] The last two numbers of the HS code used in Mexico differ from the last two numbers used in the European Union.

[2] Lily agapando, alcatraz, alheli, alstroemeria, dolar, sunflower, nardo, nube, solidago, terciopelo, zempoalxichitl.

[3] Exclusive mosses.

The Mexican exports of ornamentals exist of the products as shown in the table above. The majority of the export of cut flowers is not specified by type of flower; they fall under the category “others flowers”. According to the CMF this category mainly consists of (parts of) bouquets and lilies. Export of lilies increased drastically which is directly related to the rapid growing lily bulb imports (see paragraph 1.3). As far as cut flowers are concerned, the spectacular growth in exports during 2004-2006, amounting to almost 140%, is completely explained by the “other flowers” category.

At the same time, exports of specific types of flowers mainly decreased or stagnated since 2000. This was the case for roses, gladiola, bird of paradise, carnation: only gerbera shows a notable recent increase:

- The export of Mexican roses to the main destination, the US, decreased strongly since 1996 due to fierce competition from Colombian and Ecuadorian roses. On the other hand there has been more export of roses as part of bouquets, although the volume is not known.
- The decrease in gladiola exports was caused by the disease Uromyces transversalis (gladiolus rust) which affected the production of gladiola.

Baja California represents almost all off carnation exports of Mexico and these exports are expected to rise in the near future due to production problems in Colombia and growing production in Baja California.

The stagnation of the exports of cut flowers on the whole in the period 1996-2004 is generally presumed to be caused by the fact that the main Mexican exporters of roses were focusing more on the domestic market and that several exporters faced financial problems and were closing down unprofitable production locations (e.g.BuenaVista Floral).

The last two years the export of cut flowers has doubled and it is expected by the CMF that the export will continue growing the next years. Comments from professional growers indicate that they prefer the guaranteed sales on the export market to the fluctuating prices on the uncertain home market.

This logic as to the situation on the local market is questionable though; prices do not explain a possible change in attitude of producers towards prices on the local market (see annex 2.2). There is no clear information concerning the difference in quality of the part of production exported as compared to the part for the local market.

Comparing the above table with the one in paragraph 2.1.4. gives for some flowers part of the production value that is exported.

For all cut flowers this share amounted in 2006 to 16%. For chrysanthemum 36%, gerbera 20%, roses 9%, carnations 5%, gypsophila 3% and for gladiola to 2%.

A second category of ornamental exports, representing 20% of total exports of ornamental products concerns foliage. Also for this product there was a long period of stagnation (1998-2004. But also here there is a notable recent growth.

The third category falling under "ornamental products" concerns "live plants", mainly consisting of unrooted cuttings, in particular geraniums. In this case the stagnation in export value that started in 2000 continues. This category represents 17% of total exports of ornamentals.

According to the CMF, nowadays the main producers of ornamental products that are also exporting are Coxflor, Flores de Chiltepec, Flores la Verada, La Flor de Catemaco, Flores de San Francisco, Atlixco Viveros, Rancho El Toro and Rancho Colibri. In general, the main exporters are also the producers which grow under greenhouse conditions and represent the highest level of technology. The most important exporters of ornamental products are presented in annex 1.8. It should be pointed out that almost all producers from Baja California also are important exporters since this state is exporting approximately 80% of its production.

COUNTRIES OF DESTINATION; CUT FLOWERS (1000 USD)

LAND	YEAR					
	1996	**1998**	**2000**	**2002**	**2004**	**2006**
United States	23.116	24.231	30.100	26.720	19.130	46.857
Canada	1.496	1.606	1.427	801	878	670
Netherlands	61	4	55	25	70	206
Other EU	116	86	14	33	176	18
Other	633	96	285	258	18	20
TOTAL	**25.422**	**26.023**	**31.881**	**27.837**	**20.272**	**47.771**

Source: World Trade Atlas, Secretariat of Economy

The countries of destination are presented in the above table. In 1996 around 91% of total cut flowers exports were sold to the United States. This percentage steadily increased in the following years and in 2006 it amounted to 98%. The increase of this share took place on the cost of Canada which represented 6% in 1996 and is only 1% in 2006.

In 2005 and 2006 there was some very minor export of cut flowers to Spain and the Netherlands, too small to express in percentages.
See annex 1.6 for an overview of representatives of Netherlands companies and investors in the ornamental sector in Mexico.

4.1.1.2 Import

Mexican imports of cut flowers grew substantially in the period 1996-1998, but decreased afterwards:

IMPORT CUT FLOWERS (1000 EURO)

CODE[1]	DESCRIPTION	YEAR					
		1996	**1998**	**2000**	**2002**	**2004**	**2006**
06031013	Other fresh flowers	0	0	0	900	1.439	1.211
06031002	Orchid	0	0	0	352	662	806
06031007	Gypsophila	0	0	0	10	107	92
06031011	Anthurium	0	0	0	95	56	65
06031006	Rose	0	0	0	610	61	18
06031001	Gladiola	375	833	1.573	653	0	5
06031009	Gerbera	0	0	0	0	0	0
06031012	Bird of Paradise	0	0	0	0	0	0
06031099	Other	3	2	1	5	5	0
06031003	Carnation	0	0	0	21	0	0
06031008	Statice	0	0	0	0	0	0
	Subtotal fresh flower	**378**	**835**	**1.574**	**2.645**	**2.330**	**2.198**
060390	Prepared, dried	984	6.538	4.922	801	336	371
	TOTAL	**1.362**	**7.372**	**6.496**	**3.446**	**2.666**	**2.568**

Source: World Trade Atlas, Secretariat of Economy

The main imported varieties are "other fresh flowers" (1.2 million), mainly consisting of tulips and orchids (EUR 0.8 million). These imports were mainly used to fill some gaps on varieties that Mexico does not use or where production felt short of local demand.

COUNTRIES OF ORIGIN; CUTFLOWERS (1000 EURO)

LAND	YEAR					
	1996	**1998**	**2000**	**2002**	**2004**	**2006**
Netherlands	193	480	815	1.344	1.968	1.972
United States	872	6.704	5.456	996	458	348
Costa Rica	0	0	72	87	68	71
Other EU	4	0	0	0	1	1
Other	293	188	153	1.019	171	176
TOTAL	**1.362**	**7.372**	**6.496**	**3.446**	**2.666**	**2.568**

Source: World Trade Atlas, Secretariat of Economy

It is worth mentioning that in spite of the decrease in volume the contribution of the Netherlands has been growing during the last 10 years from EUR 0.2 million in 1996 to EUR 2,0 million in 2006 which means in increase in market share: from 50% to 90%. Of these 2 million 90% is imported by Floracel and 10% by three other companies. This growth meant a decrease in imports from the United States.

4.1.2 Planting material

4.1.2.1 Export

Trade in planting material is not well specified in international trade figures. Only 'Unrooted cuttings and slips' are definitely planting material. A part of the trade in 'Live Plants' also is

trade in planting material but which part is not clear because the definition and nature of planting material varies per product, region and even per country.

Export of live plants (060290) from Mexican origin has increased steadily between 1996 and 2006 (see next table). In 1996 the export was only USD 0.4 million. In 2006 this increased to USD 1.7 million. Unrooted cuttings (060210) grew rapidly from 1996 to 2000, then stabilized four years but in 2006 the level of exports grew again to USD 10.3 million. The reason for the stagnation is not clear.

EXPORT LIVE PLANTS, CUTTINGS (1000 USD)

CODE	DESCRIPTION	YEAR					
		1996	**1998**	**2000**	**2002**	**2004**	**2006**
060210	Unrooted cuttings	4.341	7.345	9.702	9.340	9.437	10.375
060290	Live plants, cut + slipping	446	657	709	769	1.230	1.736
060240	Roses	42	0	1	5	820	619
	TOTAL	27	76	1	16	10	90
		4.856	**8.078**	**10.413**	**10.130**	**11.497**	**12.820**

Source: World Trade Atlas, Secretariat of Economy

An important share of the export of basic planting material is from US companies or joint ventures from American and Mexican companies producing cuttings in Mexico because of the low costs. The exact nature of the Mexican exports to the US of unrooted cuttings and slips is not known, neither from what state has it originated.

COUNTRIES OF DESTINATION; LIVE PLANTS, CUTTINGS (1000 EURO)

LAND	YEAR					
	1996	**1998**	**2000**	**2002**	**2004**	**2006**
United States	2.807	4.876	8.197	9.400	8.358	7.825
Canada	476	708	802	633	395	1.615
Netherlands	155	156	450	122	207	351
Germany	271	803	914	459	36	165
Japan	36	4	16	0	0	102
Other EU	13	351	326	136	25	95
Other	115	363	293	103	122	160
TOTAL	**3.851**	**7.191**	**10.998**	**10.853**	**9.135**	**10.244**

Source: World Trade Atlas, Secretary of Economy

The export market of live plants and plant material of any importance appears to be limited to 5 countries: the US, Canada, The Netherlands, Germany and Japan. Around 75% of all Mexican parental material is exported to the US.

Mexico is therefore a relatively important producing country for planting material for US pot plant producers. Above table shows that the exports to Canada are also increasing the recent years.

4.1.2.2 Import

Mexican producers obtain their basic plant material through various channels. Besides the production of own plant material, which is still the most common way, growers depend on

local agents of foreign breeders and young plant producers from a.o. Germany, The Netherlands, US, Japan. There are also specialized young plant producers within Mexico like Viveros International, Floraplant (Ecke/Oglevee contractor), Plantulas de Tetela, etc.

Because of their price focus most growers propagate their own basic material and quality is still of minor importance, if their production is sold at the local market. Some states provide subsidies or loans for purchase of new plant material. Mexican growers are rather price oriented in their purchase of plant material. The main problem for improvement and extension of their operations is a lack of financing.

IMPORT LIVE PLANTS, CUTTINGS (1000 EURO)

CODE	DESCRIPTION	YEAR					
		1996	1998	2000	2002	2004	2006
060290	Live plants, cut + slipping	3.320	4.918	6.044	7.653	6.551	7.506
060210	Roses	2.263	1.860	1.508	1.193	743	813
060240	Unrooted cuttings and slips	495	1.218	452	559	601	598
	TOTAL	**6.078**	**7.996**	**8.004**	**9.405**	**7.895**	**8.917**

Source: World Trade Atlas, Secretariat of Economy

Mexican import of live plants and cuttings represent a value of EUR 7.5 million although it should be mentioned again that just a part of that is planting material. Total import value of live plants and unrooted cuttings is almost EUR 9 million.

Most products of these two product groups come from the United States but in the group 060240 countries from the EU (especially Germany and The Netherlands) play an important role, see the following table:

COUNTRIES OF ORIGIN; LIVE PLANTS, CUT + SLIPPING (1000 EURO)

PRODUCT	LAND	YEAR					
		1996	1998	2000	2002	2004	2006
060290, live plants, cut + slippings							
	United States	2.266	2.862	4.132	4.179	3.772	4.014
	Netherlands	833	1.637	1.610	1.646	1.509	2.482
	Colombia	0	46	56	236	142	207
	China	0	0	0	250	156	191
	Costa Rica	29	70	0	44	251	176
	Other EU	72	103	95	192	53	83
	Other	121	187	151	1.106	669	342
	SUBTOTAL	**3.320**	**4.918**	**6.044**	**7.653**	**6.551**	**7.506**
060240, unrooted cuttings and slips							
	Germany	32	39	53	140	210	179
	Costa Rica	61	73	193	221	130	126
	South Korea	0	0	0	9	31	99
	Netherlands	45	31	11	29	65	78
	United States	108	474	137	62	60	32
	Other EU	172	536	33	33	36	35

	Other	77	65	25	65	69	49
	SUBTOTAL	**495**	**1.218**	**452**	**559**	**601**	**598**
	TOTAL	**3.815**	**6.136**	**6.496**	**8.212**	**7.152**	**8.104**

Source: World Trade Atlas, Secretariat of Economy

The propagation sector in Mexico is considered to be promising as part of the ornamental industry. Due to the proximity of the US market for this basic material, the low production costs and the favorable climate, propagation of basic planting material in Mexico is a good option. Not only for Mexican companies or US/American joint ventures, but also for breeders from other continents that follow the trend of bringing the production of young plants to other regions. From Mexico they can supply their US customers, taking advantage of the free trade facilities Mexico has in NAFTA. It is obvious that North America, especially the United States, is the most evident trade partner for the Mexican ornamental plants and cut flowers industry.

4.1.3 Flower bulbs

The most important horticultural product that is imported from The Netherlands is flower bulbs for the production of bulb flowers. The table underneath shows total imports in Mexico from all destinations.
The import of dormant bulbs by Mexico has increased from 1996 until 2006 with almost EUR 18 million, which means a growth percentage of 600% in 10 years. It can be assumed that these exports will continue growing in the near future.

In particular it concerns lily bulbs, categorized under bulbs (HS Code 06011004) and representing 81% of the total import value.
The import growth of lily bulbs has been steady since 1996 and spectacular since 2004. In 2006 its value amounted to EUR 17 million. This increase is caused by different factors. Firstly, the lily is a cheap and relatively easy variety to cultivate quickly in comparison with other varieties. Secondly the lily bulbs are cheap thanks to overproduction in The Netherlands. The amount of lily bulbs imported in 2006 represent around 6.4 million kilo's and represents approximately 133 hectares production of which 70% in the State of Mexico. About 70% of the imported lily bulbs are Asiatic.

Tulip bulbs are in second place; in 2006 the import value was EUR 1.2 million

IMPORT BULBS, TUBERS (1000 EURO)

CODE	DESCRIPTION	YEAR					
		1996	1998	2000	2002	2004	2006
06011004	Lily bulbs	1.051	2.581	5.668	9.699	9.963	17.052
06011099	Other	1.931	435	688	1.015	855	1.409
06011002	Tulip bulbs	163	239	401	829	1.257	1.246
06011001	Gladiolus bulbs	250	381	819	1.013	1.024	1.214
06011005	Narcissus bulbs	1	0	5	34	25	26
06011003	Hyacinth bulbs	1	4	12	18	31	22
	Subtotal dormant	**3.397**	**3.640**	**7.594**	**12.609**	**13.155**	**20.969**
06012005	Lily bulbs	0	0	0	0	185	385
06012099	Other	106	302	272	52	60	0
06012001	Gladiolus bulbs	1	0	148	102	0	0

06012002	Chicory roots	0	0	7	0	0	0
06012003	Tulip bulbs	0	0	0	0	90	0
	Subtotal in growth or flower	**107**	**302**	**427**	**154**	**335**	**385**
	TOTAL	**3.504**	**3.942**	**8.021**	**12.762**	**13.490**	**21.354**

Source: World Trade Atlas, Secretariat of Economy

As mentioned above, The Netherlands is the most important supplier of flower bulbs for Mexico. In 1996 its market share was already 89% and this figure has hardly changed.
Other exporting countries and competitors for The Netherlands are Chile, The United States, Brazil and New Zealand (see table).

COUNTRIES OF ORIGIN; BULBS, TUBERS (1000 EURO)

LAND	YEAR					
	1996	**1998**	**2000**	**2002**	**2004**	**2006**
Netherlands	3.124	3.428	6.817	12.148	12.792	19.132
Chile	0	12	7	51	119	1.101
United States	299	303	887	354	445	705
Brazil	40	59	187	168	76	252
New Zealand	7	30	52	14	23	162
Other EU	4	0	0	0	0	0
Other	30	110	71	29	35	2
TOTAL	**3.504**	**3.942**	**8.021**	**12.762**	**13.490**	**21.354**

Source: World Trade Atlas, Secretariat of Economy

4.1.4 Equipment

The Netherlands is an important supplier of equipment for the production of horticultural products. Main products in this category are greenhouses, equipment for irrigation, fertilization, packing material. Because most technical equipment for the horticultural industry is not classified under a separate Harmonize System (HS) number, technical equipment for horticulture cannot be traced.

In the ornamental sector the technology level is even for export oriented producers not comparable to some of the producers of vegetables for export. In that sector Dutch greenhouses have been established with the same characteristics as in the Netherlands and in fact Mexico is now the most important export destination for high tech greenhouses.
Dutch equipment for the ornamental sector is limited to heating, irrigation and processing equipment.

Main competitors for Dutch greenhouse industry on the Mexican market are Richel (France), some Spanish companies and local greenhouse builders. Richel has a Dutch partner as supplier for the technical equipment for climate control, screening and heating.

4.1.5 Transport costs to the North American market

Mexico is favorably located with regards to servicing the US and Canadian market. From all major flower production areas flowers can be economically transported by temperature

controlled trucks to most destinations in these countries. By using temperature controlled road transport Mexican suppliers can send the flowers on water and guarantee the freshness. Flowers do not experience changes of temperatures and humidity during transport, will not be physically damaged and will therefore present extended vase life and reduced waist compared to flowers which traveled by air. Obviously the cost of road transport is very competitive compared to air transport from South America. For a destination like Chicago, the distribution cost from Mexico is only a third of the cost from Colombia (see table).

TRANSPORT COSTS MEXICO AND BOGOTA TO CHICAGO IN 2004 (USD)

	Mexico	**Colombia**
Transport packing system	**Aqua pack**	**Dry box**
Wholesale price per rose stem Chicago, IL	0.40	0.40
Refrigerated road transport, Mexico - Chicago	0.06	
Refrigerated road transport Miami – Chicago		0.04
Cost of aqua pack (Procona)	0.025	
Margin broker/importer 20%		0.06
Handling and storage charge Miami		Included
Customs and handling charges	Included	0.02
Air transport Bogotá - Miami		0.07
Road transport farm – Bogotá airport		0.01
Farm return price per rose stem	**0.315**	**0.20**

Source: Horticonsult BV

The cost of transport of a rose stem in water from Mexico to the US is between USD 0.06 and 0.08 according to information of exporters. Transport of the same rose stem in a dry box from Colombia cost between USD 0.14 and 0.22 depending on the services and intermediaries used.

Either a Mexican producer hires a trailer himself, or books trailer space with a third party, although very few options are available. There are also examples of North American buyers that arrange their own transport from Mexico. They buy from several growers and fill up a trailer. A Mexican producer will often try to open up a route in the US supplying several customers from the same trailer. In this way he will gather the critical mass to run the trailer economically and is less dependent on one customer.

As part of stricter rules for products entering the USA the shipper has to report the shipment 24 hours in advance to US custom authorities. Apart from administrative procedures the flowers also have to comply with US plant health regulations.

Because of this advantage a Mexican grower should be able to realize a far higher farm return price than his South American competitors. He is obliged however to offer flowers of at least comparable quality.

4.1.6 Position and perspectives Dutch export

The analysis of trade has shown that the trend shows opportunities to increase the turnover of Dutch breeding products on the Mexican market in the field of:

1. *Planting material.* Mexico has a growing import of planting material. With increased confidence in breeders' rights (and registration), also newer varieties will be imported, especially if the growth in export of cut flowers is sustained.
   Mexico could also develop its exports of parental material for the US market considerably. Climate, relatively cheap labor and the proximity of the market play an important role in this. Already some US companies have parental material produced in Mexico on a contract base. Mexico could also become an important jumping board for Dutch breeders and propagators to enter the US market, in co-operation with Mexican producers of young plants for the production of cut flowers, potted plants and bedding plants.

2. *Flower bulbs.* Dutch bulbs are considered of top quality and some 90% of the bulbs used in Mexico are from Dutch Origin. The further increase of these (iris) bulbs depend partly also on the growth of export of Iris flowers.

5 PLANT BREEDER'S RIGHTS

In the past, breeders have been hesitant to sell their latest assortment to Mexican growers as illegal multiplication of varieties had basically no sanctions and were even done by tissue culture.

"Illegal" means here that the variety was propagated without payment of breeders' rights, while the variety was registered with Mexican Plant Breeder's Rights Office (SNICS). Many varieties that are grown in Mexico are not registered for PBR and are not illegal, if produced for the local market

Producers that aim to export have always been obliged to respect breeders' rights and thus pay royalties. That is because these rights will be enforced on arrival in the export destination e.g. the US, EU or Canada. Even a variety that is not registered in Mexico but for example in the US can be confiscated at the border when entering the US in case the varieties are registered there, which is mostly the case.

The majority of Mexican growers is producing for the local market only and uses older or not registered varieties and in some cases registered ones. Products that are most effected by illegal propagation are gerbera and alstroemeria, roses and dianthus. Illegal propagation is done in several cases with material purchased on the Central de Abastos. Use of bud-eyes of rose varieties by domestic producers is common.

But there are also professional ornamental producers in Mexico that have solid agreements with breeders all over the world. In general these growers pay royalties.

In recent years the situation has improved considerably. The for breeders' rights responsible part of the Ministry of Agriculture, SNICS, has taken the following initiatives:

- elaboration of a draft legislation on breeders' rights that will allow Mexico to sign UPOV 1991 as on of the few countries in Latin America. This legislation is being discussed in Parliament. Mexico is now a member of UPOV 1978,
- sanctions against illegal multiplication on the basis of the existing legislation. Several producers have received fines and if required could be forced to close operations,
- foreign breeders have been offered these kind of sanctions on the condition that they identify local producers that illegally propagate their varieties (through their Mexican representative). So far no Dutch companies have reacted to this offer,
- involvement in the organization of seminars in order to inform producers of their obligation to pay breeders' rights.

The following table shows the number of applications for registration of breeder's rights of ornamentals in the period 1996-2007.

REGISTRATIONS OF BREEDERS' RIGHTS ORNAMENTALS (number)

YEAR	VARIETIES REGISTERED (number)	
	ALL COUNTRIES	NETHERLANDS
1996	17	0
1997	36	0
1998	35	0
1999	2	0
2000	20	17
2001	15	1
2002	13	13
2003	7	1
2004	12	1
2005	8	6
2006	24	21
2007	42	24

Source: SAGARPA/SNICS

Noticeable is the remarkable increase in the last 3 years. It is likely that this growth reflects an increasing confidence of breeders that it is worthwhile to register. Of the 42 varieties registered in 2007, half were from (4) Dutch companies. It concerned roses (6), gerbera (13) and alstroemeria (2).

Annex 4.1 shows the varieties of types of ornamentals by Dutch companies as registered since 1996. Some 50 varieties have a registration that is still valid.

This table shows that:
- it concerns 13 different Dutch companies,
- roses, gerbera and alstroemeria dominate

Information concerning breeders' rights can be found on the internet (in Spanish):
www.sagarpa.gob.mx/snics
1. Left side (light blue): information of the office of seed certification (SNICS)
2. Left side (dark blue): information on SNICS' activities and results
3. Information on Mexico's breeders' rights: first green link at top (DOV), or http://www.sagarpa.gob.mx/snics/dov.htm
4. Information on seed certification, certifiable seeds, directories, statistics: http://www.sagarpa.gob.mx/snics/certificacion.htm
5. Phytogenetic resources, available at second green link at top (RFAA): http://www.sagarpa.gob.mx/snics/rfaa.htm

6 EDUCATION, RESEARCH AND KNOW-HOW

Mexico has a competitive advantage of low labor costs compared to the USA, but people with specialized knowledge in floriculture are not widely available and can be expensive, especially in the management positions.

Generally speaking, the Mexican flower industry lacks expertise regarding know-how of export procedures and foreign markets, as well as post-harvest and advanced crop management. The lack of knowledge of pest and disease control has led to unwanted threats to the environment and workers' health.

The knowledge of post harvest technology and handling procedures is very poor amongst the smallest growers. This leads to an extreme loss of quality of flowers after harvesting. Quality in the field vary from 'very good' to 'acceptable', but once harvested, quality drops dramatically in a short time at farms where post harvest knowledge is insufficient. This process of quality loss deteriorates because many of the distributors play a negative role in maintaining a certain level of quality in the trade part of the chain.

In foreign markets this has caused a bad image for Mexican flowers. Although only a limited group of growers is able to meet the international quality standards, the negative image of Mexico in the US is improving as more and new entrepreneurial producers have (and develop) the knowledge of the export oriented flower industry.

This improvement is caused by education, both from educational institutes and from seminars and congresses organized by the Consejo Mexicano de la Flor and private organizations. The project Sistema Producto Ornamentales is an initiative of the Mexican ministry of Agriculture with the aim of further sustainable development of the ornamental industry. The Mexican Flower Council has been appointed as the official representative of all Mexican producers in the National Committee. Sistema Producto is a project that covers all agricultural sectors.

Progress in the field of production, post harvest and general quality is expected from the federal capacity building project Sistema Producto Ornamentales that pays much attention to education.

On top of all these measures there is the strong influence of the younger generation in Mexico. This younger generation is grown up in a more competitive environment. In this environment it is generally accepted that improvement of quality and the knowledge to implement modern quality systems and procedures are vital for further development. The number of producers with a university degree in an agricultural oriented study is increasing.

The government through the Ministry of Agriculture (SAGARPA) provides yearly information about the production area and volumes of flower crops but many growers either do not use them or do not have access to them.

International horticulture and flower trade magazines like the US based FloraCulture International (Ball Publishing), the Dutch FlowerTech (Reed Business Information) both in English and Flormarket (Editoria Verdimedia) in Spanish are available in Mexico.

6.1 Research and training centers

The Postgraduates College in Agricultural Sciences (CP) and the National Institute of Forest, Agriculture and Husbandry Research (INIFAP) are the two main research institutions in Mexico for agricultural issues. Both institutions have a great range of highly prepared scientists with Master and PhD level.

Floriculture research is limited but there is an increasing interest of scientists to broaden the scope of floriculture research topics. The total number of graduates at Mexican agricultural institutes was 3.474 in 2002, of which 30 in horticulture.

In post graduates studies there were nine students in floriculture in 2002. Many graduates and post graduates from other agricultural studies also start working in the horticultural or floricultural industry. The number of these students cannot be determined. It includes studies like Irrigation, Horticultural Chemistry, Vegetative Production Systems, Plant Health and trade related agricultural studies.

Many Mexican students study horticulture at US universities like Cornell and UC Davis in California, but also at Dutch or British universities or colleges. See annex 1.11 for the, most important universities and ornamental specialists in Mexico. The Financial Trust Fund for Agriculture (FIRA) runs capacity building centers in Tezoyuca (Morelos), Valle de Santiago (Guanajuato) and Morelia (Michoacán) which offers a wide range of short courses to growers that varies from crop management to marketing. The location Tezoyuca is the most important for the ornamental industry. INIFAP and the CP organize extension courses and scientific conferences related to floriculture.

6.2 Capacity building

The interest in quality improvement programs of the federal Mexican government and some state governments is increasing. Bancomex, The Mexican Bank for Foreign Trade, the Ministry of Economic Affairs and the Ministry of Agriculture launched the 'Mexico Selected Quality' or México Calidad Suprema' brand which certifies agricultural products of high quality and provides growers with subsidies for promotion and export. This program is also accessible for flower growers to brand their production through a certification procedure, but so far none of the growers have certified their floral products with this 'México Calidad Suprema' brand.

A trade/quality brand such as 'México Calidad Suprema' can only function with a good functioning market structure and solid and reliable quality requirements and control system. Despite a number of growers who can fulfill these obligations, the vast majority cannot. Therefore 'México Calidad Suprema' seems a bridge too far for the Mexican flower industry as a whole. Only when producers that are able to meet the standards of 'México Calidad Suprema' separate their products from the rest and fully control the distribution chain, it will be possible to place the best companies under the 'Mexico Calidad Suprema' label.

7 RULES AND REGULATIONS

Within the Mexican Ministry of Agriculture, Livestock, Rural Development, Fisheries and Food (SAGARPA), the sanitary service, SENASICA[1] is charged with all plant health and regulatory issues. It is important to know the applicable import norms and requirements whenever a company wishes to import or export ornamentals. The latest information on the phyto-regulations can be accessed by visiting the website of SENASICA[2]: www.senasica.sagarpa.gob.mx.

All Mexican import regulations for cut flowers and (ornamental) plants are laid down in Federal laws. NOM-007-FITO-1995 contains all phytosanitary regulations for the import of propagative planting material, NOM-009-FITO-1995 encompasses the regulations for cut flowers and cut foliage[3]. The import procedures for cut flowers are laid down in NOM-009-FIT0-1995

In practice, the import of plants and cut flowers is a matter that is mainly handled by the importer. Still the exporter has to fulfill a number of formalities. Roughly there are defined procedures for three situations:

1. The product is on the list of accepted products;
2. The product is not on the list of accepted products;
3. The product is not on the list and has never been imported before.

Ad 1:

Every shipment has to be accompanied by a EUR1 certificate, a Plant Health Certificate and an airway bill (or copy of airway bill). It is of utmost importance that the right scientific name is used on all papers, laid down in de 'Diario Oficial' (Official Gazette, a federal publication) under NOM-007-FITO-1995 with the appropriate text, such as 'This shipment is free of ….etc'. Even if the shipment exists of a variety of a certain species, only the exact name published in the 'Diaro Oficial' should be written down and not the full name including the variety. Also the code of the packing material is very important on the EUR1, the weight and the number and name of the HS-code (Harmonized System). According to remarks of importers in Mexico it is of utmost importance that the names are written according to the 'Diario Oficial'.

In practice, the importers advise Dutch suppliers to send all documents to the importer before the products are sent to Mexico. After a thorough check by the importer, the goods can be shipped. The main problems that occur: flower bulbs that still contain sand or soil, followed by insufficient control by the Dutch Plant Health Service.

On the EUR, always the Netherlands should always be the country of origin (in case the material is shipped from The Netherlands).

[1] Servicio Nacional de Sanidad, Inocuidad y Calidad Agroalimentaria, Dirección General de Sanidad Vegetal

[2] All up to date information can be found on: http://senasicaw.senasica.sagarpa.gob.mx/portal/html/sanidad_vegetal/introduccion/introduccion_sanidad_vegetal.html

[3] http://www.fas.usda.gov/gainfiles/200407/146106986.doc is a recent and reliable source from the US ministry of Agriculturefor a complete overview of all Mexican NOM's.

Beside that, the ID of the importing company should be on the document, if not, the importer has to pay 13% import tax for cut flowers and plants. The tax for young plants is 0%.

Ad 2:

If a product is not on the list, the importer in Mexico needs a 'Hoja de Requisitos Fitosanitarios' (Document of Phytosanitary Requirements). The importer has to have to request that document for that document at SENASICA before the shipment is being sent. On the document the total number of the imported products is stated as well as the port of entry. To apply for an accumulated number of the product import license is valid for 6 months. Two weeks after the application, the permit can be collected at SENASICA.

Ad 3:

If a product has never been imported in Mexico before and is not on the list of the 'Diario Oficial' a totally new situation occurs. In that case a risk analysis has to be executed and the products are quarantined. This analysis exists of 15 questions that have to be answered by an expert in these procedures. All together this takes about 6 months, although the research itself only takes two weeks. The remaining time is needed by the Plant Health Service for administration and checks of the research. Members of the Consejo Mexicano de la Flor can make use of an expert hired by the CMF against a lower than usual rate. The Plant Health Service checks the company every two weeks during the procedure between the imports. The requirement is that the installation is according to the quarantine rules.

According to an importer of planting material the number of totally new products, imported in Mexico is increasing. An estimated two to three new applications are made per month. In all cases it is forbidden to import any type of soil.

There are no restrictions for in vitro products in agar. The only requirements are a phytosanitary certificate and a certificate that proves that it has been produced by tissue culture and is free of any pest or disease. The import of in vitro products is increasing according to importers in Mexico. The market for tissue culture products is increasing. Besides multiplication by tissue culture for some food crops there is production of tissue products from gerbera, limonium and cordyline.

Besides a number of government controlled tissue labs, there are 4 commercial labs in Mexico. Most labs produce between 1 and 2 million plants. There are no labs that pay royalties, due to the fact that the products that are multiplied are free cultivars with no plant breeder's right. The facilities for hardening are limited and there is insufficient knowledge of the requirements for successful hardening.

Therefore many exporters from The Netherlands, but also other countries export already hardened planting material to Mexico. This material is much more expensive, due to high logistic costs and much better quality than the inferior tissue material that is available from Mexican (sometimes illegal) production.

There are opportunities for reliable Mexican as well as for (e.g.) Dutch tissue lab companies to establish hardening facilities for imported tissue culture material in Mexico. The ready to plant material can then be send to Mexican customers from inside Mexico. This will decrease

costs dramatically and could also boost the use of in vitro material in Mexico. In particular products like anthurium, alstroemeria, gerbera, statice/limonium, phalaenopsis, bromelia, several foliage plants, but also Naktuinbouw Elite® planting material for bedding plants, bulbs and slips like for zantedeschia.

ANNEXES

1. GENERAL

ANNEX 1.1. TERMS OF REFERENCE

1 The existing report ("The Mexican Cut Flower Market") dates from 2000. It needs (considerable) elaboration and revision because:
- developments in the past 5 years,
- the need to incorporate the faster developing plant and ornamental plant sub sectors; the former study only dealt with the cut flower sector. Therefore, the study should be titled "The Mexican Ornamental sector",
- an added objective.

2 The objective from the side of the Ministry of LNV of the Netherlands has not changed (but it could be much more focused); to provide information that is useful for Dutch (potential) exporters, investors (!) and importers. But the aim is now also to provide a basic report of the floriculture (ornamental) sector in Mexico for the Mexican Flower Council. This is based on collaboration between the MFC (CMF) and the Office of the Agricultural Counselor of the Embassy of the Netherlands. These two aims can be combined. In this connection should be mentioned that there is no existing report with an adequate analysis of the ornamental sector in Mexico.

3 The report will not be elaborated by the RABO Bank as was the case for the existing report, but by a specialized consultant from the Netherlands in close collaboration with an assigned specialist from the CMF.

4 The consultant will elaborate a draft version which will be submitted for comments to the CMF, the Office of the Agricultural Counselor and the Ministry of LNV in the Netherlands. Based on their (co-coordinated) comments an adjusted final version will be provided. If required, final editing will be done by the CFM/Office of the Agricultural Counselor.
The consultant will receive a first payment at the start of the study; final payment will be done after approval of the report by the parties involved.

5 The report will be analytical and factual in nature; from figures conclusions and explanations will be drawn. Hypothesis and explanations should be illustrated with references or figures.

6 From the perspective of the CMF (and from the Dutch side) the following elements are important to be incorporated:
- basic data:
  * all data per well defined (internationally agreed; codes) sub sectors (cut flowers, ornamental plants, foliage, bulbs and other relevant; tropical flowers?)
  * a consistent set of data (statistics) on production, consumption, export and import. These data should sum up in the equation. For these data a time series of 10 years should be presented; data should be by category and type of flowers/plants,
  * production and export data by state (10 year series),
  * the statistics should be collected and analyzed from the various original sources (not based on references in other publications), mainly government agencies, and an explanation should be provided in case various agencies provide different figures. The data should be compared with the data - and the insights and common sense - available with the CMF and, if justified, own estimates should be concluded and - with explanations - provided.
- the players:
  * producers: data of the 20 most important companies in cut flowers and of the 20 largest companies for ornamental plants. Contact data, contact person, address, area, type of flowers/plants, production volume, export volume, level of technology, foreign investment.
  * exporters (20, possibly combine with producers) and importers (10) of cut flowers and ornamental plants. Data as under producers.
  * importers/distributors (20) of plant material per category: bulbs, young plants (per type). Contact data, contact person, address, name of foreign (Dutch) companies which it represents, volumes
- Explanation why a considerable number of producers/exporters failed/went broke in previous years.
- the comparative position for exports of Mexico (proving the supposed comparative advantages) in relation to Colombia and Ecuador:

* transport costs to the U.S.,
* natural conditions (by factor and indicating which areas in Mexico are suitable)
* labour costs
* actual level of technology

- elaboration and analysis of other "strengths"
- explanation and analysis of the stagnation in the development of the ornamental exports elaborating the existing explanations:
  * the local market has prices as high as the world market (correct?; why has production not expanded more rapidly in view of the supposed favorable natural and other conditions?)
  * the impact of the illegal multiplication of varieties,
  * the level of technology is not high enough (indicate also the situation in Columbia/Ecuador in this regard)
  * there are only a limited number of producers that are large enough to be able to export,
  * other factors.
- elaboration and analysis of other "weaknesses" (e.g. knowledge, credit)

7 The objective of the report from the side of the Ministry of LNV of the Netherlands is to provide:
- general information on the sector (see point 6)
- information that is useful for Dutch (potential) exporters, investors and importers.

Of these 3 categories the Dutch exporters are at the moment the most relevant. And of the exporters, the suppliers of planting material (bulbs, young plants, seeds) are actually the most important. Other Dutch exporters supply or could supply more widely the ornamental sector e.g. suppliers of greenhouse equipment, packinghouse equipment, other ornamental plant production related requirements.
The contents of the report should reflect this aim.

8 The consequences of this objective for the contents of the report are:
- more information on imports in Mexico of especially planting material and of inputs in general (for the ornamental sector):
  * imports in Mexico of plant material (10 years) by category and share of countries of origin,
  * imports of "hardware" by relevant category (10 years) and country of origin
  * table of actual local representatives of foreign/Dutch suppliers and their relevant data
- information on imports of ornamentals in Mexico (volumes, types of flowers, countries of origin, esp. EU); 10 years time series.
- information on import regulations:
  * list of tariffs of important inputs/equipment
  * list of requirements for import of seeds, propagating material, fertilizers, etc.,
  * list of applicable norms
- information for potential NL exporters: data of major organizations in the sector (e.g. CMF), major exhibitions (e.g. EXPOFLOR) and specialized magazines,
- information on exports of MX ornamentals to the EU; types of ornamentals. countries of destination, time series (10 years)
- information on actual foreign investors in the ornamental sector (production, trading); names of companies, estimated capital invested
- relevant information for potential investors: land ownership, labor regulations etc

9 For ornamental growing in greenhouses the following elements should be provided:
- trends in area growth (last 10 years) by:
  * well defined levels of technology: high, medium, low
  * repartition by state (location)
  * share of foreign investors
- share of (high tech) glasshouses with main equipment from abroad (by country)
- bottlenecks in development:
  * professional training?
  * credit facilities?
- SWOT analysis (strengths, weaknesses, opportunities and threads); should be based on analysis elsewhere in the report.

10 Going through the existing report for inspiration some remarks:
- it would be useful to have a full page map in the beginning of the report with administrative borders and areas of production by category,

- the set up of the report in terms of chapters and annexes should be changed considerably. Information on the world market should be skipped; information on the US market should be summarized and presented with the data concerning the EU in the chapter on exports; the details of the US market could be subject of a separate study,
- THE INFORMATION IN THE EXISTING REPORT ON PRODUCTION SHOULD BE MAINTAINED (BUT UPDATED). THE SAME HOLDS FOR THE CHAPTERS ON THE DOMESTIC MARKET AND FOREIGN TRADE.
- the production, area, consumption, export and import balance could be summarized in one table, also in relative terms,
- the advantages of the NAFTA agreement should be summarized in average relative terms. On the other hand, a table in an annex could compare the import conditions: Mexico to the U.S., Mexico to the E.U. and from the E.U to Mexico, and also a comparison of (flower)transport costs from Colombia/Ecuador to the US
- in annex list of local representations of Dutch (foreign) companies (plant material, inputs).

ANNEX 1.2 EXCHANGE RATES AND DEFLATOR

EXCHANGE RATES

YEARS	DEFLATOR[1]	DOLLAR/PESO	EURO/PESO	EURO/DOLLAR
2000	73,0929	9,4556		
2001	77,7473	9,3425		
2002	81,6585	9,6560	9,27324	0,95150
2003	85,3714	10,7890	12,39161	1,14165
2004	89,3740	11,2860	13,04702	1,24746
2005	92,9383	10,8979	13,47912	1,23894
2006	96,3115	10,8992	13,79647	1,26483
2007[2]	99,4321	10,9354	14,98595	1,37172

Source: Rabobank International México

Note: [1] The deflator is an annual average and based on august 2007.

[2] Exchange rates are annual averages except for 2007 wh ich is an average of the first 11 months.

ANNEX 1.3 MAP TYPES OF CLIMATE (ALTITUDES)

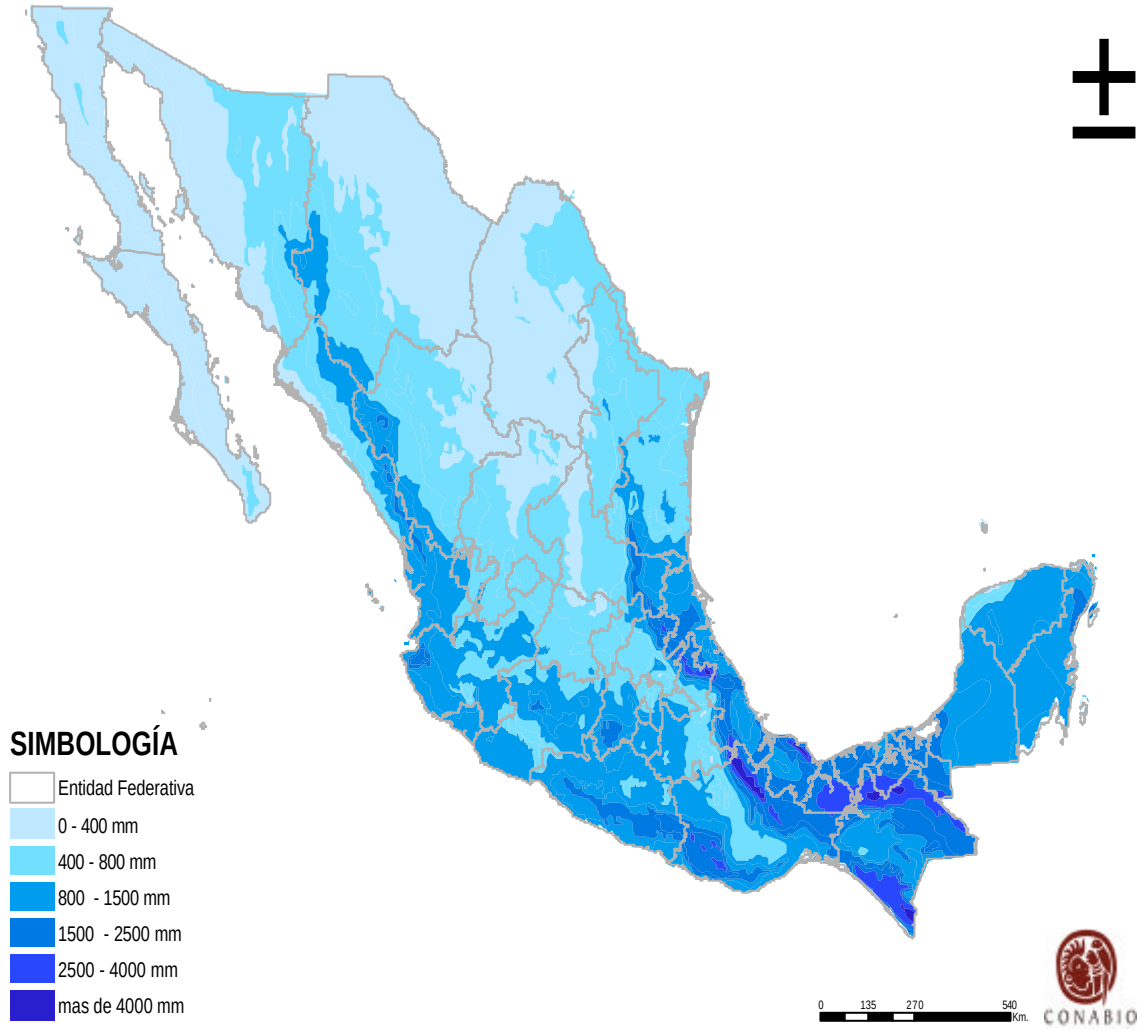
Source: Elaborated by the Comisión Nacional para el conocimiento y uso de la Biodiversidad (CONABIO) by order of the Netherlands Ministry of Agriculture, Nature and Foodquality.

Note: Calida – warm
Semicalida – semi-warm
Templada – moderate
Semifría – semi -cold
Fría - cold

ANNEX 1.4 MAP MOUNTAIN RANGES

Source: Internet, www.graphicmaps.com

ANNEX 1.5 MAP RAINFALL



Source: Elaborated by the Comisión Nacional para el conocimiento y uso de la Biodiversidad (CONABIO) at the request of the Netherlands Ministry of Agriculture, Nature and Foodquality.

ANNEX 1.6 REPRESENTATIVES OF NETHERLANDS COMPANIES AND/OR INVESTORS IN ORNAMENTAL SECTOR (MEXICO)

Office of the Agricultural Counsellor – Netherlands Embassy Mexico

Version: 11-12-2007

1. Bulbs, Flowers and Plants

Name of company:	**Akiko Flores y Plantas de Calidad**
Represents:	**AVO Anthurium Vogels – Fertiplant- Florist De Kwakel – Hilverda Plant Technology – G.A. Verdegaal – Onings Holland – AgroNew B.V. – VWS - Steenvoorden**
Contact - Position:	Claudia Lee - Director General
Address:	Av. Río Churubusco 59, Desp. 100-B, Col. Portales, CP 03300, Mexico DF
Tel.	+ 52-55 55 32 56 60 and +52-55 56 74 82 02
Fax:	+ 52-55 55 32 59 00
E-mail:	claudia.lee@akiko.com.mx
Website:	www.akiko.com.mx
Products:	Flower bulbs and seeds

Name of company:	**Stigma Internacional**
Represents:	**Anthura - Jato Plant - Tref Ego**
Contact - Position:	Arturo Flores - Director
Address:	Av. Universidad No. 3, Col. Buena Vista, CP 62131, Cuernavaca, Morelos
Tel.	+ 52-777 313 43 75
Fax:	+ 52-777 102 38 02
E-mail:	aflores@stigma.com.mx and info@anthura.nl
Website:	www.stigma.com.mx
Products:	Flower and plant bulbs, seeds, plant material; substrates

Name of company:	**Flores de Bulbos Importados**
Represents:	**C. Steenvoorden - Kooij & Zonen**
Contact – Position:	Marco Antonio Beltrán - Director
Address:	Héroes del 14 de septiembre No. 20, CP 51760, Villa Guerrero, Estado de México
Tel:	+ 52-714 146 00 34
Fax:	+ 52-714 146 00 67
E-mail:	bulbosdeflores@prodigy.net.mx and jabeltranb@coxflor.com
Website:	www.coxflor.com
Products:	Flower bulbs and seeds (lilies, gladioli, tulips, iris and carnation)

Name of company:	**Clarke, Modet y Cía. De México**
Represents:	**Piet Schreurs Holding - Olij Rozen**
Contact – Position:	Gloria Isla - Director
Address:	San Francisco 310, Col. Del Valle, CP 03100, México D.F.
Tel.	+ 52-55 53 40 23 00
Fax:	+ 52-55 55 23 64 18
E-mail:	info@clarkemodet.com.mx
Website:	www.clarkemodet.com.mx
Products:	Flowers, mainly roses

Name of company:	**Roskam Horticultura**
Represents:	**Preesman B.V.**
Contact – Position:	Erik Roskam - Director
Address:	2a Avenida Sur y Calle Los Remedios, Residencial Casa San José No. 7, Antigua, Sacatepequez, CP 03001, Guatemala
Tel:	+ 502-78 32 07 79
Fax:	+ 502-58 30 31 25
E-mail:	erik@roskamhorticultura.com
Website:	www.roskamagricultura.com
Products:	Alstroemerias, gerberas and roses

Name of company:	**InovaPlant, PolyProd México**
Represents:	**RijnPlant - Ornamentex - Esprit Plant**
Contact – Position:	Alejandro Pérez Rico - Director
Address:	Callejón de Colima # 23 Villa Coyoacán Col. Coyoacán CP 04000, México D.F.
Tel./Fax:	+ 52-777 361-55-90
E-mail:	alejandroperez@inovaplant.com.mx
Website:	www.inovaplant.com.mx
Products:	Plant material and seeds for ornamental flowers and plants

Name of company:	**Grupo Nedermex**
Represents:	**Schreurs - Stoop**
Contact – Position:	Angel Arellano Ramírez - Manager
Address:	Km. 13.3 Carr. Tenancingo-Zumpahuacán, CP 51980, Estado de México
Tel:	+ 52-714 146 92 23
Fax:	N.A.(3)
E-mail:	nedermex@prodigy.net.mx
Website:	N.A.(3)
Products:	Flower bulbs and seeds (gerbera, rose, anthuriums)

Name of company:	**Servicios Integrales de Horticultura Ornamental**
Represents:	**Terra Nigra**
Contact – Position:	Ing. Rafael Estrada Flores - Director General
Address:	Camino al Islote 100, CP 51760, Villa Guerrero, Estado de México
Tel:	+ 52-714 146 01 44
Fax:	+ 52-714 146 26 73
E-mail:	siho@prodigy.net.mx and eafr740817@yahoo.com.mx
Website:	www.terranigrausa.com
Products:	Flower and plant materials (gerbera, roses)

Name of company:	**Bulbos de Holanda**
Represents:	**Van Der Bos - VV Quality Bulbs**
Contact – Position:	Ing. Mario Guerra - Director General
Address:	Domicilio Conocido "invernaderos" s/n, Salazar Km. 36.8 Carretera México-Toluca, Salazar, CP 52045, Estado de México
Tel:	+ 52-55 82 88 50 04 and +52 722 264 37 46
Fax:	+ 52-55 82 88 50 65
E-mail:	bulboshola@prodigy.net.mx
Website:	N.A.(3)
Products:	Flowerbulbs of freesias, tulips, lilies, iris and tulips

Name of company:	**Floracel**
Represents:	**Van Dijk Bloemen**
Contact - Position (1):	Gerrit van Dijk - Owner
Contact - Position (2):	Hans Boddeke - Director
Contact - Position (3):	Carlos Torres - General Manager
Address:	Guillermo Prieto 83, Col. Jamaica, CP 15800, Mexico City
Tel:	+ 52-55 57 40 13 40
Fax:	+ 52-55 57 41 13 68
E-mail:	flohol@prodigy.net.mx
Website:	www.floresdeholanda-floracel.com
Products:	Sales of tulips, orchids, anthurium and other flowers
Remark:	Netherlands investment in company Floracel

Name of company:	**Holmex**
Contact - Position:	René Vink
Address:	Av. Río Churubusco 59, Desp. 100-B, Col. Portales, CP 03300, Mexico DF
Tel:	+ 52-55 55 32 56 60 and +52-55 56 74 82 02
Fax:	+ 52-55 55 32 59 00
Cel:	+ 521-55 18 76 99 30
E-mail:	rene@holmex.com.mx
Website:	N.A.(3)
Products:	Import and sales of ornamental flowers and plants

2. Biologic Control

Name of company:	**Koppert Biological Systems**
Represents:	**Koppert**
Contact – Position (1):	Rigoberto Bueno - Director
Contact – Position (2):	Benjamin John Breman - Manager
Address:	Av. Del Marqués 38-1, Parque Industrial Bernardo Quintana, CP 76246, Municipio del Marqués, Querétaro
Tel:	+ 52-442 221 61 49
Fax:	+ 52-442 221 61 48
E-mail:	koppert@koppert.com.mx and rigobueno@koppert.com.mx and bbreman@koppert.com.mx
Website:	www.koppert.com
Products:	Biological systems for horticulture projects
Remark:	Investment in production facility of bumblebees.

3. Floriculture Supplies

Name of company:	**Smithers Oasis de México**
Represents:	**Pokon - Chrystal**
Contact – Position:	Ing. Gerardo Cruz - Manager
Address:	Oviedo 24 entre Aldama y Libertad, Col. Centro, Villa Guerrero, Estado de México
Tel:	+ 52-722 291 84 11 and +52-714 146 29 81
E-mail:	gcruz@smithersoasis.com and gcruzlopez@hotmail.com
Website:	www.smithersoasis.com
Products:	Cut flower preservation products (Chrystal brand)

4. Production

Name of company:	**Xochipilli: Ornamentales y Vegetales Limpios**
Contact – Position:	Tammo Hoeksema - Owner
Address:	Carretera Panamericana Km. 120.5, Amatenango del Valle, Chiapas
Tel:	+ 52-992 690 42 33
Fax:	N.A.(3)
E-mail:	tammo_gerberas@yahoo.com.mx and tammohoeksema@yahoo.com.mx
Website:	N.A.(3)
Products:	Biologic production of gerbera (0.25 hectares in greenhouses)

Name of company:	**Fiesta Farms**
Contact and position:	Miguel van Beek – General Manager
Address:	Km 91.5 Carretera Ensenada – Tecate, Colonia Maneadero, CP 22790, Ensenada, Baja California
Tel.	+ 52-646 120 64 39 ext. 15
Fax:	+ 52-646 120 64 39
E-mail:	miguel@fiestaflowers.com
Website:	N.A.(2)
Product:	Gladiola, sunflower, carnation, asiatic lilies, larkspur, transvaal daisy, snapdragon, etc.
Activities (size – tech):	Production and exports (65 has. – greenhouses and open field

Source: Contacts of the Office of the Agricultural Counsellor and sector publications

Notes:

(1) For telephone or fax communication (not mobile phone):
- From NL to Mexico: dial +52 followed by the city code and phone/fax number.
- From Mexico (another city): dial +01 followed by the city code and phone/fax number.
- From Mexico (same city): omit +52 and +01. Dial only the phone number.

(2) For calls to Mexican mobile phones:
- From NL to Mexico: dial +52 1 followed by the city code and mobile number.
- From Mexico (another city): dial 045 followed by the city code and mobile number.
- From Mexico (same city): substitute 045 for 044. Dial the mobile number.

(3) N.A. - Not Available

ANNEX 1.7 ORNAMENTAL SECTOR ORGANIZATIONS

CONSEJO MEXICANO DE LA FLOR (CMF)

Contact Person:	Ing. Marco Antonio Beltrán – President Estela Guerra Atrip - Manager
Address1:	Guillermo Prieto No. 99, Colonia Jamaica, CP 15800, Mexico DF (Mexico City office)
Address2:	Jose Ma Garcia No. 14, Tercer Nivel – Int. 2, Colonia Centro, CP 51760 (Villa Guerrero office)
Tel.	+ 52-55 5740 6295 (Mexico City) and + 52-714 146 2663 (Villa Guerrero)
Fax:	+ 52-55 5740 8073 (Mexico City)
E-mail:	info@conmexflor.org and mabeltran@conmexflor.org
Website:	www.conmexflor.org
Activities:	National representation of ornamentals producers. A directory of cut flower producers and coming events can be found on the website.

PRODUCTORES DE ORNAMENTALES DE MORELOS (POMAC)

Contact Person:	Ing. Luis Granada Carreto – President
Address:	Cda. Tequesquitengo No. 4, Bis Col Fracc. Cuauhnáhuac, Cuernavaca
State:	Morelos
Tel:	+ 52-777 322 4977
Fax:	+ 52-777 316 5723
E-mail:	pomac@pomac.org.mx
Website:	www.pomac.org.mx
Activities:	Representation of ornamental plant growers in Morelos,

CONSEJO DE FLORES DEL ESTADO DE MEXICO

Contact Person:	Oscar Castro - Director
Address:	Prolongación Moctezuma s/n esquina Hidalgo, CP52400 Tenancingo, State of Mexico
Tel:	+ 52-714 142 04 60
Fax:	+ 52-714 142 03 00
E-mail:	ocastrog@yahoo.com
Website:	Not Available
Activities:	Local representation of ornamentals producers of the State of Mexico.

ANNEX 1.8 MAIN EXPORTERS ORNAMENTAL PRODUCTS (MEXICO)

Office of the Agricultural Counsellor – Netherlands Embassy in Mexico

Version: 17-12-2007

- STATE OF BAJA CALIFORNIA

Name of company:	**Rancho Twins**
Contact and position:	Jose Antonio Mendoza Padilla - Socio
Address:	Km 2 Carretera la Bufadora parcela 107, Colonia Maneadero, CP 22790, Ensenada, Baja California.
Tel.	+ 52-646 154 17 35
Fax:	+ 52-646 154 17 65
E-mail:	rancho_twins@hotmail.com
Website:	N.A.(2)
Product:	Sunflower, carnation, liciantus, lilies
Activities (size – tech):	Production and exports (300 has. – open field)
Destination of exports:	United States

Name of company:	**Fiesta Farms**
Contact and position:	Miguel van Beek – General Manager
Address:	Km 91.5 Carretera Ensenada – Tecate, Colonia Maneadero, CP 22790, Ensenada, Baja California
Tel.	+ 52-646 120 64 39 ext. 15
Fax:	+ 52-646 120 64 39
E-mail:	miguel@fiestaflowers.com
Website:	N.A.(2)
Product:	Gladiola, sunflower, Asiatic lilies, carnation, larkspur, Transvaal daisy, snapdragon, etc.
Activities (size – tech):	Production and exports (65 has. – greenhouses and open field)
Destination of exports:	United States

Name of company:	**Rancho Guacatay**
Contact and position:	Bernardino García - Owner
Address:	Km. 25.5 Carretera Libre Tijuana-Ensenada, CP 22780, Rosarito, Baja California
Tel.	+ 52-646 154 09 82
Fax:	+ 52-646 154 09 82
E-mail:	bgg@telnor.net
Website:	N.A.(2)
Product:	(Mini) carnation
Activities (size – tech):	Production and exports (23 has. – greenhouses, open field)
Destination of exports:	United States

Name of company:	**Rancho Flora Cáctus**
Contact and position:	Manuel Marchena Delgado – N.A.(2)
Address:	Lago Chaira 477, Colonia Valle Dorado, CP 22890, Ensenada, Baja California
Tel.	+ 52-646 154 09 82
Fax:	+ 52-646 154 09 67
E-mail:	scactus@telnor.net
Website:	N.A.(2)
Product:	Pot plants, larkspur, perritos, deshidrata, lilies, gerbera
Activities (size – tech):	Production and exports (24.5 has – greenhouses)

Name of company:	**Rancho Daisy's**
Contact and position:	Hector Lara Soria - Representative
Address:	Km. 50 Carretera Tijuana – Ensenada, Colonia El descanso, CP 22712, Rosarito, Baja California
Tel.	+ 52-661 614 11 44
Fax:	+ 52-641 614 11 45
E-mail:	ranchodaisy@hotmail.com and randaisy@telnor.net and ranchodaisy@prodigy.net.mx
Website:	N.A.(2)
Product:	Waxflower, safari, myrtle, liciantus, snapdragon.
Activities (size – tech):	Production and exports (3.5 has. – greenhouses and 12.5 has - open field)
Destination of exports:	United States (California)

Name of company:	**Rancho Hermanos Cárdenaz**
Contact and position:	Cesar Kennedy Cardenaz – Owner
Address:	CP 22790, Maneadero, Baja California
Tel.	+ 52-646 154 26 68
Fax:	+ 52-646 154 26 68
E-mail:	rancho_cardenas@hotmail.com
Website:	N.A.(2)
Product:	Chrysanthemum, gladiola, carnation, nardo
Activities (size – tech):	Production and exports (10 has. – greenhouses)
Destination of exports:	United States

Name of company:	**Rancho El Toro**
Contact and position:	Manuel Aguirre Ulloa – Owner
Address:	Km. 28 Carretera Libre Tijuana-Ensenada, CP 22780, Rosarito, Baja California
Tel.	+ 52-661 612 20 88
Fax:	+ 52-661 615 13 15
E-mail:	cardon2005@hotmail.com
Website:	N.A.(2)
Product:	Carnation, bird of paradise
Activities (size – tech):	Production and exports (7 has – greenhouses and open field)
Destination of exports:	United States

- STATE OF CHIAPAS

Name of company:	**Finca Argovia Div. Flores, Río Cuilco**
Contact and position:	Jorge Giesemann - Manager
Address:	37 Pte, No.5, Colonia 5 de Febrero, CP 30700, Tapachula, Chiapas
Tel.	+52-962 626 50 55 and +52-962 626 91 82
Fax:	+52-962 626 31 99
E-mail:	riocuilco@cuilcovalley.com.mx
Website:	www.cuilcovalley.com.mx
Product:	Tropical flowers, ginger, heliconias, anthuriums, tropical foliage
Activities (size – tech):	Production and exports (36 has. - greenhouses, mesh shadow, open field)
Destination of exports:	United States

- STATE OF JALISCO

Name of company:	**Camflor**
Contact and position:	Javier Campos - Manager
Address:	Carretera Guadalajara – Saltillo Km. 50, CP 45260, Ixtlahuacán, Jalisco
Tel.	+ 52-373 734 50 54 and +52-333 823 94 47
Fax:	+ 52-373 734 51 33
E-mail:	daniel@camflor.comand camflormx@yahoo.com.mx
Website:	www.coxflor.com
Product:	Delphiniums, statice sinuata, sunflower
Activities (size – tech):	Production and exports (20 has – open field)
Destination of exports:	United States

Name of company:	**Finlam**
Contact and position:	Ramón L. Sotil Achutegui - Director
Address:	Domicilio Conocido; Rancho el Jaral, CP 49200, Atoyac, Jalisco
Tel.	+ 52-372 410 20 28 and +52-372 410 50 38
Fax:	+ 52-372 410 20 18
E-mail:	finlam@prodigy.net.mx and ramonsa@avantel.net
Website:	www.finlam.com.mx
Product:	Leather leaf fern
Activities (size – tech):	Production and exports (15 has. – mesh shadow)
Destination of exports:	United States

- STATE OF MEXICO

Name of company:	**Coxflor**
Contact and position:	José Angel Beltrán - Owner Marco Antonio Beltrán - Manager
Address:	Héroes del 14 de septiembre # 20 CP 51760 Villa Guerrero, Estado de México
-Production:	Rancho Colorado - Carretera Federal Toluca-Ixtapan de la Sal Km. 60, CP 51760, Villa Guerrero, Estado de México
Tel.	+ 52-714 146 00 34 and +52-714 146 08 32
Fax:	+ 52-714 146 00 67 and +52-714 146 00 11
E-mail:	ventas@coxflor.com and coxflor@prodigy.net.mx and mabeltranb@coxflor.com
Website:	www.coxflor.com
Product:	Roses, oriental and Asiatic lilies, gerberas, tulips, alstroemeria, gladioli, fillers
Activities (size - tech):	Production and exports (at least 40 has. - greenhouses)
Destination of exports:	United States (Texas)

Name of company:	**Productores de Flores Los Morales, 14 producers (Rancho Los Morales)**
Contact and position:	Víctor Villa Blanco - Manager
Address:	Coyotzin 266 Col. Electricistas, Toluca, Estado de México
Tel.	+ 52-722 215 81 83 and + 52-722 214 26 56
Fax:	+ 52-714 142 73 73
E-mail:	rodrigovilla@hotmail.com
Website:	N.A.(2)
Product:	Carnations, roses, gladioli, gerbera, lilies
Activities (size - tech):	Production and exports (100 has. - greenhouses)
Destination of exports:	United States

Name of company:	**Flores de Chiltepec**
Contact and position:	Ing. Rogelio Olascoaga - Owner
Address:	Antiguo Camino a Chiltepec-Coatepec Harinas s/n, CP 51750, Estado de México
Tel.	+ 52-723 147 40 91 and +52-723 147 40 92 and +52-723 147 40 93
Fax:	+ 52-723 147 40 95
E-mail:	jparra@chiltepec.com and rolascoaga@chiltepec.com and comercializadorachiltepec@prodigy.net.mx
Website:	www.chiltepec.com
Products:	Roses and spray roses, phalaenopsis orchids, oriental and Asiatic lilies, tulips, mini gerbera, iris
Activities (size – tech):	Production and exports (25 has. – greenhouses)
Destination of exports:	United States (east coast)

Name of company:	**Flores de San Francisco**
Contact and position:	Ing. Arturo Pérez Sánchez – Owner
Address:	Av. Coxcacoaco s/n - Antiguo Camino a Buenavista y Arroyo del Muerto s/n, CP 51760, Villa Guerrero, Estado de México
Tel:	+ 52-714 146 13 07 and +52-714 146 13 08
Fax:	+ 52-714 146 05 25
E-mail:	psafsf@prodigy.net.mx
Website:	N.A.(2)
Product:	Roses, gerberas, iris
Activities (size - tech):	Production and exports (19 has. – greenhouses, open field)
Destination of exports:	United States (California)

Name of company:	**Rancho La Era**
Contact and position:	Estuardo Díaz Gazca - Manager
Address:	Sn. José Progreso, CP 51700,
Tel.	+ 52-723 145 02 03
Fax:	+ 52-723 145 02 03
E-mail:	imestuardo@yahoo.com
Website:	N.A.(2)
Products:	Heliconia, bird of paradise, aggies blue & white
Activities (size – tech):	Production and exports (18,5 has. - open field)
Destination of exports:	United States

Name of company:	**Super Rosa Monrog**
Contact and position:	Irma Rodríguez - Owner Norma Rodríguez - Owner
Address:	Barrio de Jesús Carranza s/n, CP 51760, Villa Guerrero, Estado de México
Tel.	+ 52-714 146 03 30
Fax:	+ 52-714 456 04 63
E-mail:	ventas@monrog.com
Website:	www.monrog.com
Product:	Roses
Activities (size – tech):	Production and exports (11 has. - greenhouses)
Destination of exports:	United States (Texas)

Name of company:	**Flores la Vereda**
Contact and position:	Alfonso Duque Tovar - Owner
Address:	Km. 2 cam. antiguo Sn. José Villa de Allende, Donato Guerra, Estado de México
Tel.	+ 52-726 251 53 41 and +52-726 251 53 47
Fax:	+ 52-726 251 53 41
E-mail:	floreslavereda@yahoo.com.mx
Website:	N.A.(2)
Product:	Roses, alstroemeria
Activities (size – tech):	Production and exports (8 has. - greenhouses)
Destination of exports:	United States

Name of company:	**Rancho Santo Tomás**
Contact and position:	Rosario Polo – Owner
Address:	Domicilio Conocido, Ejido los Morales Tenancingo, Estado de México
Tel.	+ 52-714 142 34 44 and +52-714 142 46 48
Fax:	+ 52-714 142 34 44
E-mail:	floresstotomas@yahoo.com.mx and ranchosantotomas@yahoo.com.mx and rosariopolo@yahoo.com.mx
Website:	N.A.(2)
Product:	Roses, gerberas
Activities (size - tech):	Production and exports (7 has. - greenhouses)
Destination of exports:	N.A.(2)

Name of company:	**Rancho Los Oyameles**
Contact and position:	Arturo Guadarrama – Owner Connie Guadarrama - Manager
Address:	Aldama # 73, Col. Centro, CP 51760, Villa Guerrero, Estado de México
Tel.	+ 52-714 146 00 27 and +52 714 146 01 33
Fax:	+ 52-714 146 09 52
E-mail:	oyameles@prodigy.net.mx
Website:	www.oyameles.com.mx
Product:	Roses, gerberas, asiatic & oriental Lillies, iris, spray roses, alstroemeria
Activities (size – tech):	Production and exports (7 has. - greenhouses, mesh shadow)
Destination of exports:	United States

Name of company:	**Viveros el Volcán**
Contact and position:	Rolf Schoenfeld - Director
Address:	Barrio Zacanguillo s/n Apdo. Postal No.1, CP 51700, Coatepec Harinas, Estado de México
Tel.	+ 52-723 145 07 60 and +52-723 145 07 61
Fax:	+ 52-723 145 07 63
E-mail:	viverosvolcan@prodigy.net.mx
Website:	N.A.(2)
Product:	Gerberas, rose, lilies.
Activities (size – tech)	Production and exports (4.3 has - greenhouses)
Destination of exports:	United States (Los Angeles, Houston, San Antonio)

Name of company:	**Grupo Mexbloom**
Contact and position:	Juan Estrada Bernal - Manager
Address:	Km. 60 Carretera Federal Toluca Ixtapan de la Sal, Sn Francisco, CP 51760, Villa Guerrero, Estado de México
Tel.	+ 52-714 146 29 64
Fax:	+ 52-714 146 16 04
E-mail:	gmexbloom@prodigy.net.mx
Website:	www.grupomexbloom.com.mx
Product:	Tropical flowers: ginger, heliconia, gerbera, sunflower, gladioli
Activities (size – tech):	Production and exports (4 has. - greenhouses)
Destination of exports:	N.A.(2)

Name of company:	**Rancho Los Pilares**
Contact and position:	Javier Migoya von Bertrab - Owner
Address:	Km. 7.5 Santa Cruz,Carretera Tenancingo-Zumpahuacán, Zumpahuacán, Estado de México
Tel.	+ 52-714 142 34 24 and +52 714 142 34 25
Fax:	+ 52-714 142 27 00
E-mail:	lospilares@prodigy.net.mx
Website:	www.rancholospilares.com
Product:	Aster, phlox, limonium, mini carnation, delphinium
Activities (size – tech):	Production and exports (3 has. - greenhouses)
Destination of exports:	United States

Name of company:	**Flores Tapatías**
Contact and position:	Gustavo Iñiguez Jiménez - Owner
Address:	Domicilio Conocido Barrio del Aguacate Dulce, CP 51760, Villa Guerrero, Estado de México
Tel.	+ 52-714 146 24 48
Fax:	+ 52-714 142 37 29
E-mail:	florestapatias@prodigy.net.mx
Website:	N.A.(2)
Product:	Roses
Activities:	Production and exports (2 has. - greenhouses)
Destination of exports:	N.A.(2)

- STATE OF MICHOACAN

Name of company:	**Rancho Colibri**
Contact and position:	Jaime Zamora Pérez - Owner
Address:	Atenas No. 19 Frac. La Joyita, CP 60170, Uruapan, Michoacán
Tel:	+ 52-452 523 57 44
Fax:	+ 52-452 523 97 00
E-mail:	rcolibri@intermatsa.com.mx
Website:	www.ranchocolibri.com
Product:	Birds of paradise
Activities (size – tech):	Production and exports (20 has. – tunnels, open field)

Name of company:	**Invernaderos de Zitacuaro**
Contact and position:	Mauricio Gonzalez - Manager
Address:	Cuahutémoc Ote. 11 Centro, CP 61500, Zitacuaro, Michoacán.
Tel.	+ 52-715 153 32 77
Fax:	+ 52-715 153 70 50
E-mail:	invernaderos@izi.com.mx and mauriciogh@izi.com.mx
Website:	N.A.(2)
Product:	Heliconia, hybrid lilies, asiatic lilies, oriental lilies, tulips
Activities (size – tech):	Production and exports (5 has. - greenhouses)
Destination of exports:	United States

- STATE OF PUEBLA

Name of company:	**Viveros Atlixco**
Contact and position:	Jorge Cruz - Manager
Address:	Héroes del 4 de Mayo No.3, Colonia Cabrera, CP 74360, Atlixco, Puebla
Tel.	+ 52-244 445 61 45
Fax:	+ 52-244 445 61 49
E-mail:	atlixcovivero1s@yahoo.com.mx and artlixcoviveros2@yahoo.com.mx and bulbosatlixcoviveros@yahoo.com.mx
Website:	www.atlixcoviveros.com.mx
Product:	Heliconia, white arum lily, gladioli, tulips, tuberoses, fillers: aster, statice, solidago
Activities (size – tech):	Production and exports (35 has. – greenhouses, open field)
Destination of exports:	United States (Los Angeles)

Name of company:	**Rancho La Joya**
Contact and position:	Gustavo Escobar – Gerente de producción
Address:	Domicilio Conocido Col. Juan Uvera, Colonia Juan Uvera, CP 74200, Puebla
Tel.	+ 52-244 445 32 99 and +52-244 445 44 88
Fax:	+ 52-244 445 34 91
E-mail:	N.A.(2)
Website:	N.A.(2)
Product:	Gladiola, limonium, orquids, etc.
Activities (size – tech):	Production and exports (– greenhouses)
Destination of exports:	United States and Europe

- STATE OF SINALOA

Name of company:	**Juan Cristóbal**
Contact and position:	Jesús Gonzalo Pérez - Manager
Address:	Macario Gaxiola No. 30, CP 81000, Guasave, Sinaloa
Tel.	+ 52-687 872 90 64 and +52-687 878 01 91
Fax:	+ 52-687 872 90 64
E-mail:	jgperez@prodigy.net.mx
Website:	N.A.(2)
Product:	Gladioli, limonium, liatris
Activities (size – tech)	Production and exports (6 has. - greenhouses, mesh shadow, open field)
Destination of exports:	United States (California)

Name of company:	**Divine Blooms**
Contact and position:	Joaquín Vega - Manager
Address:	Santos Degollado No. 517, colonia centro, CP 81200, Los Mochis, Sinaloa
Tel.	+ 52-668 818 66 88
Fax:	+ 52-667 760 14 38
E-mail:	jvega@divineblooms.com
Website:	N.A.(2)
Product:	Snapdragon, sunflower, waxflower
Activities (size – tech):	Production and exports (N.A.(2) - greenhouses)
Destination of exports:	United States (Los Angeles)

- STATE OF TABASCO

Name of company:	**Tropical Corporation**
Contact and position:	Aníbal Pedrero - Manager
Address:	Paseo de la Sierra No. 229, CP 86040, Villahermosa, Tabasco
Tel.	+ 52-993 315 28 53 and + 52-993 315 28 55
Fax:	+ 52-993 315 28 53
E-mail:	anibalpedrero@apbyasociados.com
Website:	N.A.(2)
Product:	Chamaedor elegance & obligata, tropical flowers
Activities (size – tech):	Production and exports (40 has. – open field)
Destination of exports:	N.A.(2)

Name of company:	**Tropiflor Tabasco**
Contact and position:	Blanca Whizar - Manager
Address:	Paseo Tabasco No. 1112, Colonia García, CP 86040, Villahermosa, Tabasco
Tel.	+ 52-993 315 14 09
Fax:	+ 52-993 315 27 79
E-mail:	bwhizar@hotmail.com and aleyris@yahoo.com.mx
Website:	N.A.(2)
Product:	Tropical flowers: heliconia, ginger, tropical foliage
Activities (size – tech):	Production and exports (30 – 50 has. – open field)
Destination of exports:	N.A.(2)

- STATE OF VERACRUZ

Name of company:	**La Flor de Catemaco**
Contact and position:	José de la Luz Ponce Puente - Represantative
Address:	Km. 9.5 Carretera de Catemaco – Coyame, Apartado Postal 49, Catemaco, Veracruz.
Tel.	+ 52-294 943 51 28
Fax:	+ 52-294 943 51 28
E-mail:	informes@laflordecatemacp.com
Website:	www.laflordecatemaco.com
Product:	Folliage, palms, helecho cuero, espárragos, piñas ornamentales.
Activities (size – tech):	Production and exports (160 has. – mesh shadow and open air)
Destination of exports:	United States

- STATE OF YUCATAN

Name of company:	**Flores Finas de Teya**
Contact and position:	Fernando Poblano - Manager
Address:	Km. 11.2 Carretera Mérida – Puerto Juárez, Hacienda Teya, CP 97370, Kanasín, Yucatán
Tel:	+ 52-999 988 09 05
Fax:	+ 52-999 988 12 87
E-mail:	info@floresfinasteya.com
Website:	www.floresfinasteya.com
Product:	Roses, anthurium, heliconia, limonium, phaleanopsis orchid, papiro, bromelliad
Activities (size – tech)	Production and exports (N.A.(2) – greenhouses, open field)
Destination of exports:	Canada

Sources:

- Mexican Flower Council (Consejo Mexicano de la Flor)
- Contacts of the Office of the Agricultural Counsellor
- Guía Verde México (ornamental sector directory)
- Mexbest (Mexican Agricultural Exporters Directory)

Notes:

(1) For telephone or fax communication, dial +52 followed by the city and phone/fax number when calling from outside Mexico. Dial +01 followed by the city and phone/fax number from calling from within Mexico. If you are in the same city, omit +52 and +01.

(2) N.A. - Not Available

(3) E-mail: cmf@conmexflor.org belongs to the Mexican Flower Council. Some companies do not have their own e-mail, and the CMF can contact them.

(4) size - tech: size measured in hectares, tech: technology level, ranging from highest to lowest: greenhouses, tunnel, mesh shadow and open field

ANNEX 1.9 IMPORT TARIFFS OF PLANTING MATERIAL AND FLOWERS[1]

CODE	DESCRIPTION	TARIFF WITHIN TLC[2](%)		
		EU	US/Canada	General[3]
060110	**Bulbs, dormant**			
06011004	Lily bulbs	0	0	0
06011099	Other	0	0	0
06011002	Tulip bulbs	0	0	0
06011001	Gladiolus bulbs	0	0	0
06011005	Narcissus bulbs	0	0	0
06011003	Hyacinth bulbs	0	0	0
060120	**Bulbs, in growth or flower**			
06012005	Lily bulbs	0	0	10
06012099	Other	0	0	10
06012001	Gladiolus bulbs	0	0	10
06012002	Chicory roots	0	0	10
06012003	Tulip bulbs	0	0	10
0602	**Live plants and cuttings**			
060290	Live plants, cut + slipping	0	0	10
060210	Roses	0	0	0
060240	Unrooted cuttings	0	0	10
060310	**Fresh flower**			
06031013	Other fresh flowers	0	0	0
06031002	Orchid	0	0	0
06031007	Gypsophila	0	0	0
06031011	Anthurium	0	0	0
06031006	Rose	0	0	0
06031001	Gladiola	0	0	0
06031009	Gerbera	0	0	0
06031012	Bird of Paradise	0	0	0
06031099	Other	0	0	0
06031003	Carnation	0	0	0
06031008	Statice	0	0	0
060390	**Prepared, dried**			
06039099	Other	0	0	20
94060001	Prefabricated buildings, including greenhouses	0	0	0

Source: Tarifaenlinea database.

Notes: [1] Exclusive IVA tax

[2] Tratado de Libre Comercio, Free Trade Agreement

[3] If no Free Trade Agreement

ANNEX 1.10 MAIN EXHIBITIONS

To get a good impression of what the Mexican market has to offer and where possible partners can be found it is recommendable to visit some of the many events in Mexico. In this annex the two most important events with regard to the ornamental sector are presented. For other, often local, events the websites of the CMF and Guia Verde can be consulted.

EXPOVERDE

Floriculture, ornamental plants, tropical plants, foliage, inputs for the floriculture industry, floriculture design, gardening and interior design. Area: 250 stands (3,600 sq.m.). Mexican and international participation

Contact:	Arturo Cárdenas
Tel.	+ 52-55 91 16 37 56
Fax:	+ 52-55 91 16 37 55
E-mail:	expoverde@guiaverde.com and arturo@guiaverdemexico.com
Website:	www.guiaverdemexico.com
Date:	Not yet known
Place:	World Trade Centre, Mexico City

EXPOFLOR

Floriculture, ornamental plants, tropical plants, foliage, inputs for the floriculture industry. Approximately 2,700 sq. meters space

Contact:	Estela Guerra
Tel.	+ 52-55 57 40 62 95
Fax:	+ 52-55 57 40 80 73
E-mail:	eguerra@conmexflor.org and info@expoflormexico.com
Website:	www.conmexflor.org and www.expoflormexico.com
Date:	Not yet known

ANNEX 1.11 UNIVERSITIES AND ORNAMENTAL SPECIALISTS (MEXICO)

Office of the Agricultural Counsellor - Netherlands Embassy in Mexico

Version: 01-11-2007

Name:	**COLEGIO DE POSTGRADUADOS**
Contact and position:	Dr. Félix Valerio González Cossío - Director General Directorate of International Relations
Address:	Km. 36.5 Carretera México – Texcoco, CP 56230 Montecillo, Estado de México
Tel.	+ 52-55 58 04 59 01
Fax:	+ 52-595 58 04 59 05
E-mail:	dirgal@colpos.mx and reint@colpos.mx and felix@colpos.mx
Website:	www.colpos.mx

Name:	**UNIVERSIDAD AUTONOMA CHAPINGO**
Contact and position:	Lic. Diane Fumiko Miyoshi Udo - Chief of Academic Exchange and International Issues José Merced Mejía Muñoz – Profesor, Investigador, Instituto de Horticultura Ornamental
Address:	Km. 38.5 Carr. México – Texcoco, CP 56230 Chapingo, Estado de México
Tel.	+ 52-595 952 16 15
Fax:	+ 52-595 952 15 65
E-mail:	intercambio_acad@correo.chapingo.mx
Website:	www.chapingo.mx

Name:	**INSTITUTO NACIONAL DE INVESTIGACIONES FORESTALES, AGRÍCOLAS Y PECUARIAS (INIFAP)**
Contact and position:	Dr. Pedro Brajcich Gallegos - Director General Ing. Mariano Mora - Secretary General Edgar Rendón
Address:	Progreso 5 - 1er. Piso Col. Del Carmen Coyoacán, CP 04100, Ciudad de México, México
Tel:	+ 52-55 54 84 19 00 and +52-55 54 97 31
Fax.	+ 52-55 55 46 41 35
E-mail:	brajcich.pedro@inifap.gob.mx and Mora.mariano@inifap.gob.mx
Website:	www.inifap.gob.mx

Name:	**INSTITUTO NACIONAL DE INVESTIGACIONES FORESTALES, AGRÍCOLAS Y PECUARIAS (INIFAP) - CELAYA, GUANAJUATO STATE**
Contact and position:	Dr. Javier Castellanos - Greenhouse Specialist
Address:	Celaya, Guanajuato
Tel:	+ 52 461 611 53 23 ext. 101
Mobile.	+ 52 461 11 33 01 92
E-mail:	N.A.(1)
Website:	www.inifap.gob.mx

Name:	**FIDEICOMISOS INSTITUIDOS EN RELACION CON LA AGRICULTURA (FIRA)**
Contact and position:	Lic. Rodrigo Alfonso Sánchez Mújica - Director General
Address:	Periférico Sur 4300, Col. Jardines del Pedregal, CP 04500, Ciudad de México, México
Tel:	+ 52-55 54 49 19 05
Fax.	+ 52-55 54 49 19 10
E-mail:	cmacin@correo.fira.gob.mx
Website:	www.fira.gob.mx - FIRA has 5 Technological Development Centers

Name:	**Instituto Tecnológico y de Estudios Superiores de Monterrey (ITESM) Campus Querétaro (Querétaro Campus)**
Contact and position:	Dr. Enrique Autrique Ruíz - Researcher, Department of Agronomy
Address:	Epigmenio González 500, CP 76130 Santiago de Querétaro, Querétaro
Tel.	+ 52-442 238 32 21
E-mail:	jeautriq@itesm.mx
Website:	www.itesm.mx

Name:	**UNIVERSIDAD NACIONAL AUTÓNOMA DE MÉXICO – UNAM**
Contact and position:	Dr. Javier Laguna Calderón - Subdirector Post Graduate Studies
Address:	Edificio de la Unidad de Postgrado – 2o. Piso, Ciudad Universitaria, Coyoacán, CP 04510, Ciudad de México, México
Tel.	+ 52-55 56 23 00 54 and +52-55 56 23 00 51
Fax.	+ 52-55 56 23 00 59
E-mail:	laguna@posgrado.unam.mx
Website:	www.unam.mx

Source:
- Contacts of the Office of the Agricultural Counsellor
- ANUIES (www.anuies.mx) : National University Association

Notes:

1) N.A. - Not Available

2) For telephone or fax communications from outside Mexico. Dial +01 (substitute +52) followed by the city and phone/fax number from calling from within Mexico. If you are in the same city, omit +52 and +01. For mobile phones, dial +52 1 and the state code and number. Substitute +52 1 for 045 and the state code when in Mexico. Dial 044 and the area code when in same city.

3) This database only includes selected education centers in the horticultural sector.

ANNEX 1.12 SPECIALIZED PUBLICATIONS AND MAGAZINES

GUIAVERDEMEXICO (half – yearly publication)
The "green guide". Reference guide to the floriculture, plant production and retail industry. Publicity from different countries. A directory of the different sub sectors can be found on their website. Also the latest information on coming events can be consulted on the webpage.

Contact:	Arturo Cárdenas – General Director
Tel.	+ 52-55 91 16 37 56
Fax:	+ 52-55 91 16 37 55
E-mail:	info@guiaverde.com and arturo@guiaverdemexico.com
Website:	www.guiaverdemexico.com

FLORES Y FOLLAJES ORNAMENTALES (magazine)
Ornamentals: flowers and foliage. Mainly for suppliers of the ornamental industry. Open to Mexican and foreign companies.

Contact:	Javier Bolaños – General Director
Tel.	+ 52- 55 25 96 28 50 and +52-55 25 96 25 51
Email:	javierbolcar@prodigy.net.mx
Website:	www.revistaderiego.com

TECNO AGRO
Horticulture, agri-industry, greenhouses, horti-technology.

Contact:	Ana Serna Villazón
Tel.	+ 52-55 53 60 40 21
Fax.	+ 52-55 53 63 77 53
Email:	asernav@tecnoagro.com.mx
Website:	www.tecnoagro.com.mx

2000AGRO
Horticulture, nature & sustainable development. Involvement mainly of US and Canadian-based companies through their Mexican representatives.

Contact:	Wendy Coss y León – General Director
Tel.	+ 52-55 56 60 16 55
Fax.	+ 52- 55 56 60 12 51
Email:	wendy@3wmexico.com and ventas@3mexico.com
Website:	www.teorema.com.mx

ANNEX 1.13 CLASSIFICATION OF CUT FLOWERS AND POT PLANTS, NAMES IN VARIOUS LANGUAGES.

FLOWERS AND FILLERS				
SIAP no.	**English**	**Scientific name**	**Spanish/Mexican**	**Dutch**
4	Agapanthus African lily	Agapanthus spp.	Agapando	Agapanthus Africaanse lelie (blauwe) tuberoos
12	Calla lily Arum lily	Zantedeschia spp.	Alcatraz Calla / Lirio / Aro	Aronskelk
16-17-18	Matthiola Stock	Matthiola	Alhelí Matthiola	Violier Muurbloem
21	Alstroemeria Peruvian Lily	Alstroemeria L.	Alstroemeria Peregrina de Lima	Alstroemeria Incalelie
25	Anthurium Flamingo flower	Anthurium spp.	Anturio Flor de flamenco	Anthurium Flamingobloem
31	Aster Michaelmass daisy	Aster spp.	Aster	Aster Herfstaster
32	Bird of Paradise	Sterlitzia reginae	Ave del Paraíso Esterlicia	Sterlitzia Paradijsvogelbloem
36	Lily	Lilium spp.	Azucena / Lily / Lirio	Lelie
85	Carnation	Dianthus spp.	Clavel	Anjer
96	Chrysanthemum	Chrysanthemum spp.	Crisantemo Margarita	Chrysant
101	Filler (Silver dollar)	Plectranthus	Dólar (follaje)	?
114	Wax flower	Chamelaucium uncinatum	Flor Cera	?
116	**Other cut flowers**	----------	**Flores varias**	**Ov. Snijbloemen**
130	Gerbera Transvaal daisy	Gerbera spp.	Gerbera	Gerbera
132	Sunflower	Helianthus spp.	Girasol	Zonnebloem
133	Sword lily / Gladiolus	Gladiolus spp.	Gladiola Gladiolo	Gladiool
141	Gypsophila	Gypsophila spp.	Gypsophilia	Gypsophila
166	Lily	Lilium L.	Lilium	Lelie
170	Sea Lavender	Limonium spp.	Limonium / Statice	Zeelavendel
188-189	Daisy	Chrysanthemus Leucanthemum	Margarita	Margriet
203	Tuber	Polianthes tuberosa	Nardo	Tuberoos
208-209	Gypsophila Baby's breath	Gypsophila paniculata	Nube Gypsophila	Gipskruid
214	Orchid	Dendrobium spp. Phalaenopsis spp.	Orquídea	Orchidee
243	?	?	Polar	?
244	Pom-pom chrysanthemum	Chrysanthemum (tros kas)	Pon-pon	Chrysanthemum (tros kas)
253-255	Rose	Rosa spp.	Rosa	Roos
264	Solidago	Solidago spp.	Solidago	Solidago
279-280	?	?	Terciopelo	?
305-306	African marigold	Tagetes erecta	Zempoalxochitl	Afrikaan (tje)

POT PLANTS (FOLLIAGE)				
No. SIAP	**English**	**Scientific name**	**Spanish/Mexican**	**Dutch**
38	Begonia	Begonia L.	Begonia	Begonia
39	Balsam	Impatiens balsamina	Belen Alegría de la casa	Springzaad Vlijtig liesje
54	Kalanchoe Flaming kathy Tom thums	Kalanchoe spp.	Calancoe	Kalanchoë
82	?	?	Cineraria	?
86	Carnation	Dianthus spp.	Clavel	Anjer Dianthus
98	Chrysantemum	Chrysantemum L.	Crisantemo Margarita	Chrysant
99	Cyclamen	Cyclamen spp.	Cyclamen	Cyclamen
118	**Other Flowering Pot Plants**	----------	**Flores de Maceta**	**Ov. Bloeiende**
129	Geranium	Geranium spp.	Geranio	Geranium
144	Fern	Adiantum bellum	Helecho	Varen
145	Fern	Adiantum bellum	Helecho	Varen
151	Hydrangea	Hydrangea macrophylla	Hortensia	Hortensia
183	?	?	Mano de león	?
188	Daisy	Chrysanthemus Leucanthemum Bellis spp. Argyranthemum frutescens	Margarita	Margriet
205	Poinsettia	Euphorbia pulcherrima	Nochebuena (mx) Flor de Pascua (sp)	Kerstster
216	Palm	Palmaceae spp.	Palma de Ornato	Palm
217	Pal,	Palmaceae spp.	Palma de Ornato	Palm
218	Dwarf mountainpalm	Chamaedorea spp.	Camedor	Mex. dwergpalm
226	Violet Pansy	Viola wittrockiana	Pensamiento (mx) Violeta	Viooltje
232	Petunia	Petunia Juss. Hybr.	Petunia	Petunia
240	**Other Ornamental Plants**	----------	**Plantas de Ornato**	**Sierplanten**
254-256	Rose	Rosa L.	Rosa	Roos
258	Aloe vera	Aloe vera	Sávila (mx)	Aloë vera
286	Clover	Trifolium spp.	Trébol	Klaver
298	**Nursery Plants**	----------	**Plantas de Vivero**	**Kwekerij planten**
307	African marigold	Tagetes spp.	Damasquina Zempoalxochitl	Afrikaan(tje)

Sources : SIAP, Plant Health Department of SENASICA (Ministry of Agriculture, Mexico)

: Various (for names in different languages)

Notes : The categories "Other Cut Flowers", Other Flowering Pot Plants", "Other Ornamental Plants" and Nursery Plants are not defined by SIAP.

2. CUT FLOWERS

ANNEX 2.1 DEVELOPMENT AREA OF CUT FLOWERS BY STATE AND TYPE OF FLOWERS 2001-2006 [2] (Hectares)

STATE	YEAR					
	2001	2002	2003	2004	2005	2006
Total SIAP	**12.252**	**12.021**	**12.415**	**11.729**	**12.210**	**12.525**
Total corr. [1]	**11.347**	**10.551**	**10.959**	**10.795**	**11.326**	**11.703**
State of Mexico	5.628	4.958	5.130	5.162	5.448	5.628
Puebla	2.886	2.382	2.534	2.537	2.542	2.574
Morelos	1.047	1.151	952	1.106	1.243	1.391
Michoacán	451	460	429	447	523	628
Baja California	242	380	418	396	392	420
Guerrero	338	286	257	463	338	338
Veracruz	118	163	273	123	220	218
Oaxaca	152	95	123	50	215	172
Querétaro	101	50	56	80	93	93
Jalisco	39	41	83	84	80	81
Distrito Federal	33	33	69	70	50	49
San Luis Potosí	46	42	71	42	63	37
Sonora	57	46	51	20	30	23
Durango	30	2	42	4	-	20
Hidalgo	70	40	15	14	36	14
Tlaxcala	8	3	6	6	8	8
Yucatán	-	-	8	-	5	4
Chihuahua	-	9	40	40	-	4
Nayarit	50	19	3	25	20	2
Sinaloa	31	382	385	119	22	1
Guanajuato	20	6	13	5	-	-
Baja California Sur	-	-	-	-	-	-
Coahuila		3	3	4	-	-
Aguascalientes	N.A. [3]	N.A.	N.A.	N.A.	N.A.	N.A.
Campeche	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.
Chiapas	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.
Colima	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.
Nuevo León	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.
Quintana Roo	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.
Tabasco	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.
Tamaulipas	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.
Zacatecas	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.

Source: Derived from SIAP data on the basis of annex 1.13.

Notes: [1] Marigold (Tagetes erecta) is presented for each State as a total according to SIAP and in a corrected version, where we estimate that only 30% is for ornamental uses.

[2] Similar statistics are also available for 1990-2001 but are not presented here.

[3] For these States no statistical information is available. Based on areas in the list of producers (annex 2.3) per State, it is estimated that these States together have an area of at least 200 hectares.

STATE OF MEXICO	2001	2002	2003	2004	2005	2006
TOTAL SIAP	**5.657**	**4.977**	**5.164**	**5.194**	**5.505**	**5.687**
TOTAL CORRECTED [1]	**5.628**	**4.958**	**5.130**	**5.162**	**5.448**	**5.628**
Marigold	41	27	49	46	82	85
Marigold corr. [1]	12	8	15	14	25	25,5
Gladiolus	1.065	793	771	803	817	945
Chrysanthemum	2.466	2.220	2.347	2.293	2.339	2.355
Rose	343	397	417	431	427	475
Gypsophila	380	238	77	70	178	194
Carnation	724	720	710	737	755	712
Pom-pom Chr.	0	0	0	0	0	2
Matthiola	91	86	86	70	138	131
Tuberosa	35	65	65	80	65	55
Sunflower	184	93	108	136	124	124
Sea Lavender	34	12	58	55	37	58
Bird of Paradise	53	66	76	98	92	92
"Terciopelo"	40	27	47	53	53	51
African Lily (Agapanthus)	28	34	52	38	49	40
Other	173	199	301	284	349	368

PUEBLA	2001	2002	2003	2004	2005	2006
TOTAL SIAP	**3.375**	**2.903**	**3.049**	**3.095**	**3.090**	**3.136**
TOTAL CORRECTED [1]	**2.886**	**2.382**	**2.534**	**2.537**	**2.542**	**2.574**
Marigold	698	745	736	797	783	803
Marigold corr. [1]	209	224	221	239	235	241
Gladiolus	1.420	1.084	1.067	1.073	1.073	1.076
Chrysanthemum	0	0	0	0	0	43
Rose	60	60	60	62	62	62
Gypsophila	632	497	666	633	661	473
Carnation	0	0	0	0	0	0
Pom-pom Chr.	0	0	0	0	0	0
Matthiola	309	296	296	300	295	305
Tuberosa	5	0	3	0	3	0
Sunflower	0	0	0	0	0	0
Sea Lavender	112	82	82	74	59	59
Bird of Paradise	0	0	0	0	0	0
"Terciopelo"	0	0	0	0	0	0
African Lily (Agapanthus)	0	0	0	0	0	0
Other	139	139	139	156	154	315

MORELOS	2001	2002	2003	2004	2005	2006
TOTAL SIAP	**1.052**	**1.152**	**953**	**1.107**	**1.249**	**1.394**
TOTAL CORRECTED [1]	**1.047**	**1.151**	**952**	**1.106**	**1.243**	**1.391**
Marigold	7	1	2	2	9	5
Marigold corr. [1]	2	0	1	1	3	2
Gladiolus	427	583	319	659	733	728
Chrysanthemum	0	41	41	40	50	58
Rose	362	342	386	267	302	394
Gypsophila	0	0	0	0	0	0
Carnation	0	0	0	0	0	0
Pom-pom Chr.	0	0	0	0	0	1
Matthiola	0	0	0	0	0	0
Tuberosa	182	127	164	131	118	164
Sunflower	0	15	9	0	3	3
Sea Lavender	0	0	0	0	0	0
Bird of Paradise	0	0	0	0	0	1
"Terciopelo"	24	1	0	0	8	15
African Lily (Agapanthus)	0	30	14	0	15	10
Other	50	12	18	8	11	15

SAN LUIS POTOSI	2001	2002	2003	2004	2005	2006
TOTAL SIAP	**63**	**63**	**84**	**57**	**92**	**44**
TOTAL CORRECTED [1]	**46**	**42**	**71**	**42**	**63**	**37**
Marigold	25	30	18	22	42	10
Marigold corr. [1]	8	9	5	7	13	3
Gladiolus	0	0	0	0	0	0
Chrysanthemum	0	0	0	0	0	0
Rose	0	0	0	0	0	0
Gypsophila	0	0	0	0	0	9
Carnation	0	0	0	0	0	0
Pom-pom Chr.	0	0	0	0	0	0
Matthiola	0	0	0	0	0	0
Tuberosa	0	0	0	0	0	0
Sunflower	0	0	0	0	0	0
Sea Lavender	0	0	0	0	0	0
Bird of Paradise	0	0	0	0	0	0
"Terciopelo"	0	0	0	0	0	0
African Lily (Agapanthus)	0	0	0	0	0	0
Other	38	33	66	35	50	25

GUERRERO	2001	2002	2003	2004	2005	2006
TOTAL SIAP	**350**	**298**	**272**	**477**	**350**	**350**
TOTAL CORRECTED [1]	**338**	**286**	**257**	**463**	**338**	**338**
Marigold	17	17	22	20	17	17
Marigold corr. [1]	5	5	7	6	5	5
Gladiolus	268	232	207	387	268	268
Chrysanthemum	0	0	0	0	0	0
Rose	0	0	2	2	0	0
Gypsophila	7	8	6	6	7	7
Carnation	0	0	0	0	0	0
Pom-pom Chr.	0	0	0	0	0	0
Matthiola	0	0	0	0	0	0
Tuberosa	31	27	27	43	31	31
Sunflower	0	0	0	0	0	0
Sea Lavender	0	0	0	0	0	0
Bird of Paradise	0	0	0	0	0	0
"Terciopelo"	16	11	4	14	16	16
African Lily (Agapanthus)	0	0	0	0	0	0
Other	11	3	4	5	11	11

MICHOACAN	2001	2002	2003	2004	2005	2006
TOTAL SIAP	**451**	**460**	**451**	**461**	**532**	**642**
TOTAL CORRECTED [1]	**451**	**460**	**429**	**447**	**523**	**628**
Marigold	0	0	32	20	13	20
Marigold corr. [1]	0	0	9,6	6	4	6
Gladiolus	331	293	268	287	367	467
Chrysanthemum	0	0	0	0	0	0
Rose	12	12	12	12	12	12
Gypsophila	0	0	13	13	11	14
Carnation	0	0	0	0	0	0
Pom-pom Chr.	0	0	0	0	0	0
Matthiola	0	0	0	0	0	0
Tuberosa	0	0	0	0	0	0
Sunflower	0	3	0	0	0	0
Sea Lavender	0	0	0	0	0	0
Bird of Paradise	86	86	108	108	108	108
"Terciopelo"	0	0	0	0	0	0
African Lily (Agapanthus)	0	0	0	0	0	0
Other	22	66	18	21	21	21

JALISCO	2001	2002	2003	2004	2005	2006
TOTAL SIAP	**39**	**41**	**83**	**84**	**80**	**81**
TOTAL CORRECTED [1]	**39**	**41**	**83**	**84**	**80**	**81**
Marigold	0	0	0	0	0	0
Marigold corr. [1]	0	0	0	0	0	0
Gladiolus	0	0	0	0	0	0
Chrysanthemum	0	0	0	0	0	0
Rose	0	0	0	0	8	21
Gypsophila	0	0	0	0	0	0
Carnation	0	0	0	0	0	0
Pom-pom Chr.	0	0	0	0	0	0
Matthiola	0	0	0	0	0	0
Tuberosa	0	0	0	0	0	0
Sunflower	6	0	0	0	0	0
Sea Lavender	0	0	0	0	0	0
Bird of Paradise	6	6	6	6	6	6
"Terciopelo"	0	0	0	0	0	0
African Lily (Agapanthus)	0	0	0	0	0	0
Other	27	35	77	78	66	54

BAJA CALIFORNIA	2001	2002	2003	2004	2005	2006
TOTAL SIAP	**242**	**380**	**418**	**396**	**392**	**420**
TOTAL CORRECTED [1]	**242**	**380**	**418**	**396**	**392**	**420**
Marigold	0	0	0	0	0	0
Marigold corr. [1]	0	0	0	0	0	0
Gladiolus	0	0	0	0	0	0
Chrysanthemum	0	0	0	0	0	0
Rose	0	0	0	0	0	0
Gypsophila	0	0	0	0	0	0
Carnation	0	0	0	0	0	0
Pom-pom Chr.	0	0	0	0	0	0
Matthiola	0	0	0	0	0	0
Tuberosa	0	0	0	0	0	0
Sunflower	0	0	0	0	0	0
Sea Lavender	0	0	0	0	0	0
Bird of Paradise	0	0	0	0	0	0
"Terciopelo"	0	0	0	0	0	0
African Lily (Agapanthus)	0	0	0	0	0	0
Other	242	380	418	393	392	420

SINALOA	2001	2002	2003	2004	2005	2006
TOTAL SIAP	**31**	**1.177**	**1.186**	**340**	**22**	**2**
TOTAL CORRECTED [1]	**31**	**382**	**385**	**119**	**22**	**1**
Marigold	0	1.136	1.144	316	0	2
Marigold corr. [1]	0	341	343	95	0	1
Gladiolus	0	0	0	0	0	0
Chrysanthemum	0	0	0	0	0	0
Rose	0	0	0	0	0	0
Gypsophila	0	0	0	0	0	0
Carnation	0	0	0	0	0	0
Pom-pom Chr.	0	0	0	0	0	0
Matthiola	0	0	0	0	0	0
Tuberosa	0	0	0	0	0	0
Sunflower	0	0	0	0	0	0
Sea Lavender	0	0	0	0	0	0
Bird of Paradise	0	0	0	0	0	0
"Terciopelo"	0	0	0	0	0	0
African Lily (Agapanthus)	0	0	0	0	0	0
Other	31	41	42	24	22	0

VERACRUZ	2001	2002	2003	2004	2005	2006
TOTAL SIAP	**118**	**163**	**273**	**123**	**220**	**218**
TOTAL CORRECTED [1]	**118**	**163**	**273**	**123**	**220**	**218**
Marigold	0	0	0	0	0	0
Marigold corr. [1]	0	0	0	0	0	0
Gladiolus	85	130	85	85	105	105
Chrysanthemum	0	0	0	0	0	0
Rose	0	0	0	0	0	0
Gypsophila	0	0	0	0	0	0
Carnation	0	0	0	0	0	0
Pom-pom Chr.	0	0	0	0	0	0
Matthiola	0	0	0	0	0	0
Tuberosa	13	13	13	13	15	30
Sunflower	0	0	0	0	0	0
Sea Lavender	0	0	0	0	0	0
Bird of Paradise	0	0	0	0	0	0
"Terciopelo"	0	0	0	0	0	0
African Lily (Agapanthus)	0	0	0	0	0	0
Other	20	20	175	25	100	83

OAXACA	2001	2002	2003	2004	2005	2006
TOTAL SIAP	**328**	**115**	**154**	**100**	**403**	**300**
TOTAL CORRECTED [1]	**152**	**95**	**123**	**50**	**215**	**172**
Marigold	252	29	45	72	269	183
Marigold corr. [1]	76	9	14	22	81	55
Gladiolus	10	10	17	16	36	23
Chrysanthemum	0	0	0	0	0	0
Rose	0	0	0	0	0	0
Gypsophila	0	0	0	0	0	0
Carnation	0	0	0	0	0	0
Pom-pom Chr.	0	0	0	0	0	0
Matthiola	0	0	0	0	0	0
Tuberosa	0	0	0	0	0	0
Sunflower	0	0	0	0	0	0
Sea Lavender	0	0	0	0	0	0
Bird of Paradise	0	0	0	0	0	0
"Terciopelo"	0	0	0	0	0	0
African Lily (Agapanthus)	0	0	0	0	0	0
Other	66	76	92	12	98	94

DISTRITO FEDERAL	2001	2002	2003	2004	2005	2006
TOTAL SIAP	**33**	**33**	**69**	**70**	**50**	**49**
TOTAL CORRECTED [1]	**33**	**33**	**69**	**70**	**50**	**49**
Marigold	0	0	0	0	0	0
Marigold corr. [1]	0	0	0	0	0	0
Gladiolus	0	0	0	0	0	0
Chrysanthemum	0	0	0	0	0	0
Rose	27	27	27	31	30	29
Gypsophila	0	0	0	0	0	0
Carnation	0	0	0	0	0	0
Pom-pom Chr.	0	0	0	0	0	0
Matthiola	3	3	3	3	3	3
Tuberosa	0	0	0	0	0	0
Sunflower	0	0	0	0	0	0
Sea Lavender	0	0	0	0	0	0
Bird of Paradise	0	0	0	0	0	0
"Terciopelo"	0	0	0	0	0	0
African Lily (Agapanthus)	0	0	0	0	0	0
Other	3	3	39	36	17	17

QUERETARO	2001	2002	2003	2004	2005	2006
TOTAL SIAP	**220**	**50**	**56**	**80**	**93**	**93**
TOTAL CORRECTED [1]	**101**	**50**	**56**	**80**	**93**	**93**
Marigold	170	0	0	0	0	0
Marigold corr. [1]	51	0	0	0	0	0
Gladiolus	0	0	0	0	0	0
Chrysanthemum	0	0	0	0	0	0
Rose	50	50	56	80	93	93
Gypsophila	0	0	0	0	0	0
Carnation	0	0	0	0	0	0
Pom-pom Chr.	0	0	0	0	0	0
Matthiola	0	0	0	0	0	0
Tuberosa	0	0	0	0	0	0
Sunflower	0	0	0	0	0	0
Sea Lavender	0	0	0	0	0	0
Bird of Paradise	0	0	0	0	0	0
"Terciopelo"	0	0	0	0	0	0
African Lily (Agapanthus)	0	0	0	0	0	0
Other	0	0	0	0	0	0

DURANGO	2001	2002	2003	2004	2005	2006
TOTAL SIAP	**46**	**6**	**48**	**14**	**0**	**38**
TOTAL CORRECTED [1]	**30**	**2**	**42**	**4**	**0**	**20**
Marigold	23	6	8	14	0	26
Marigold corr. [1]	7	2	2	4	0	8
Gladiolus	0	0	0	0	0	0
Chrysanthemum	0	0	0	0	0	0
Rose	0	0	0	0	0	0
Gypsophila	0	0	0	0	0	0
Carnation	0	0	0	0	0	0
Pom-pom Chr.	0	0	0	0	0	0
Matthiola	0	0	0	0	0	0
Tuberosa	0	0	0	0	0	0
Sunflower	23	0	40	0	0	12
Sea Lavender	0	0	0	0	0	0
Bird of Paradise	0	0	0	0	0	0
"Terciopelo"	0	0	0	0	0	0
African Lily (Agapanthus)	0	0	0	0	0	0
Other	0	0	0	0	0	0

NAYARIT	2001	2002	2003	2004	2005	2006
TOTAL SIAP	**50**	**19**	**3**	**25**	**20**	**2**
TOTAL CORRECTED [1]	**50**	**19**	**3**	**25**	**20**	**2**
Marigold	0	0	0	0	0	0
Marigold corr. [1]	0	0	0	0	0	0
Gladiolus	0	0	0	0	0	0
Chrysanthemum	0	0	0	0	0	0
Rose	0	0	0	0	0	0
Gypsophila	0	0	0	0	0	0
Carnation	0	0	0	0	0	0
Pom-pom Chr.	0	0	0	0	0	0
Matthiola	0	0	0	0	0	0
Tuberosa	0	0	0	0	0	0
Sunflower	50	19	0	25	20	2
Sea Lavender	0	0	0	0	0	0
Bird of Paradise	0	0	0	0	0	0
"Terciopelo"	0	0	0	0	0	0
African Lily (Agapanthus)	0	0	0	0	0	0
Other	0	0	3	0	0	0

HIDALGO	2001	2002	2003	2004	2005	2006
TOTAL SIAP	**94**	**109**	**23**	**22**	**61**	**22**
TOTAL CORRECTED [1]	**70**	**40**	**15**	**14**	**36**	**14**
Marigold	34	98	12	12	36	12
Marigold corr. [1]	10	29	4	4	11	4
Gladiolus	0	0	0	0	0	0
Chrysanthemum	0	0	0	0	0	0
Rose	9	9	10	10	10	10
Gypsophila	51	2	1	0	15	0
Carnation	0	0	0	0	0	0
Pom-pom Chr.	0	0	0	0	0	0
Matthiola	0	0	0	0	0	0
Tuberosa	0	0	0	0	0	0
Sunflower	0	0	0	0	0	0
Sea Lavender	0	0	0	0	0	0
Bird of Paradise	0	0	0	0	0	0
"Terciopelo"	0	0	0	0	0	0
African Lily (Agapanthus)	0	0	0	0	0	0
Other	0	0	0	0	0	0

SONORA	2001	2002	2003	2004	2005	2006
TOTAL SIAP	**57**	**46**	**51**	**20**	**30**	**23**
TOTAL CORRECTED [1]	**57**	**46**	**51**	**20**	**30**	**23**
Marigold	0	0	0	0	0	0
Marigold corr. [1]	0	0	0	0	0	0
Gladiolus	0	0	0	0	0	0
Chrysanthemum	0	0	0	0	0	0
Rose	0	0	0	0	0	0
Gypsophila	0	0	0	0	0	0
Carnation	0	0	0	0	0	0
Pom-pom Chr.	0	0	0	0	0	0
Matthiola	0	0	0	0	0	0
Tuberosa	0	0	0	0	0	0
Sunflower	0	0	0	0	0	0
Sea Lavender	0	0	0	0	0	0
Bird of Paradise	0	0	0	0	0	0
"Terciopelo"	0	0	0	0	0	0
African Lily (Agapanthus)	0	0	0	0	0	0
Other	57	46	51	20	30	23

TLAXCALA	2001	2002	2003	2004	2005	2006
TOTAL SIAP	**18**	**10**	**14**	**14**	**16**	**16**
TOTAL CORRECTED [1]	**8**	**3**	**6**	**6**	**8**	**8**
Marigold	15	10	12	12	12	12
Marigold corr. [1]	5	3	4	4	4	4
Gladiolus	3	0	0	0	0	0
Chrysanthemum	0	0	0	0	2	2
Rose	0	0	2	2	2	2
Gypsophila	0	0	0	0	0	0
Carnation	0	0	0	0	0	0
Pom-pom Chr.	0	0	0	0	0	0
Matthiola	0	0	0	0	0	0
Tuberosa	0	0	0	0	0	0
Sunflower	0	0	0	0	0	0
Sea Lavender	0	0	0	0	0	0
Bird of Paradise	0	0	0	0	0	0
"Terciopelo"	0	0	0	0	0	0
African Lily (Agapanthus)	0	0	0	0	0	0
Other	0	0	0	0	0	0

YUCATAN	2001	2002	2003	2004	2005	2006
TOTAL SIAP	**0**	**0**	**8**	**0**	5	**4**
TOTAL CORRECTED [1]	**0**	**0**	**8**	**0**	**5**	**4**
Marigold	0	0	0	0	0	0
Marigold corr. [1]	0	0	0	0	0	0
Gladiolus	0	0	0	0	0	1
Chrysanthemum	0	0	0	0	0	0
Rose	0	0	0	0	0	0
Gypsophila	0	0	0	0	0	0
Carnation	0	0	0	0	0	0
Pom-pom Chr.	0	0	0	0	0	0
Matthiola	0	0	0	0	0	0
Tuberosa	0	0	0	0	0	0
Sunflower	0	0	0	0	0	0
Sea Lavender	0	0	0	0	0	0
Bird of Paradise	0	0	0	0	0	0
"Terciopelo"	0	0	0	0	0	0
African Lily (Agapanthus)	0	0	0	0	0	0
Other	0	0	8	0	5	3

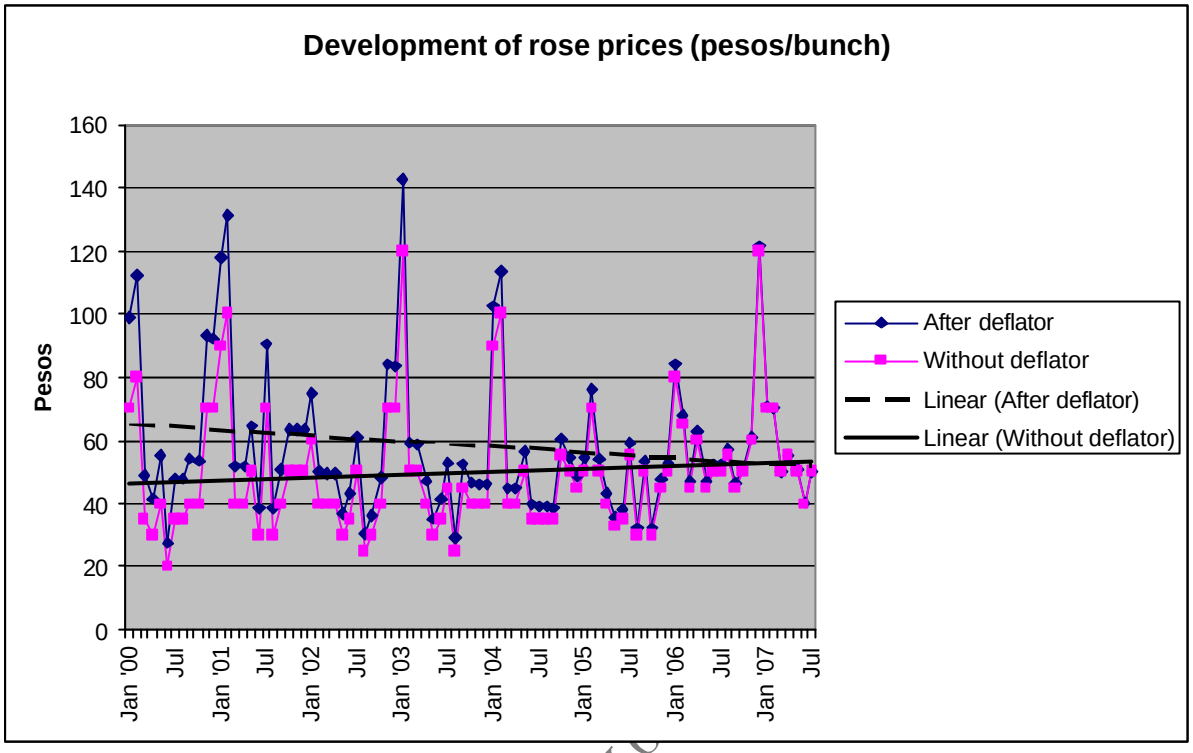
GUANAJUATO	2001	2002	2003	2004	2005	2006
TOTAL SIAP	**28**	**7**	**13**	**6**	**0**	**0**
TOTAL CORRECTED [1]	**20**	**6**	**13**	**5**	**0**	**0**
Marigold	11	1	0	1	0	0
Marigold corr. [1]	3	0	0	0	0	0
Gladiolus	15	3	3	0	0	0
Chrysanthemum	0	0	0	0	0	0
Rose	0	0	0	0	0	0
Gypsophila	0	0	0	0	0	0
Carnation	0	0	0	0	0	0
Pom-pom Chr.	0	0	0	0	0	0
Matthiola	0	0	0	0	0	0
Tuberosa	0	0	0	0	0	0
Sunflower	2	0	0	0	0	0
Sea Lavender	0	0	0	0	0	0
Bird of Paradise	0	0	0	0	0	0
"Terciopelo"	0	0	0	0	0	0
African Lily (Agapanthus)	0	0	0	0	0	0
Other	0	3	10	5	0	0

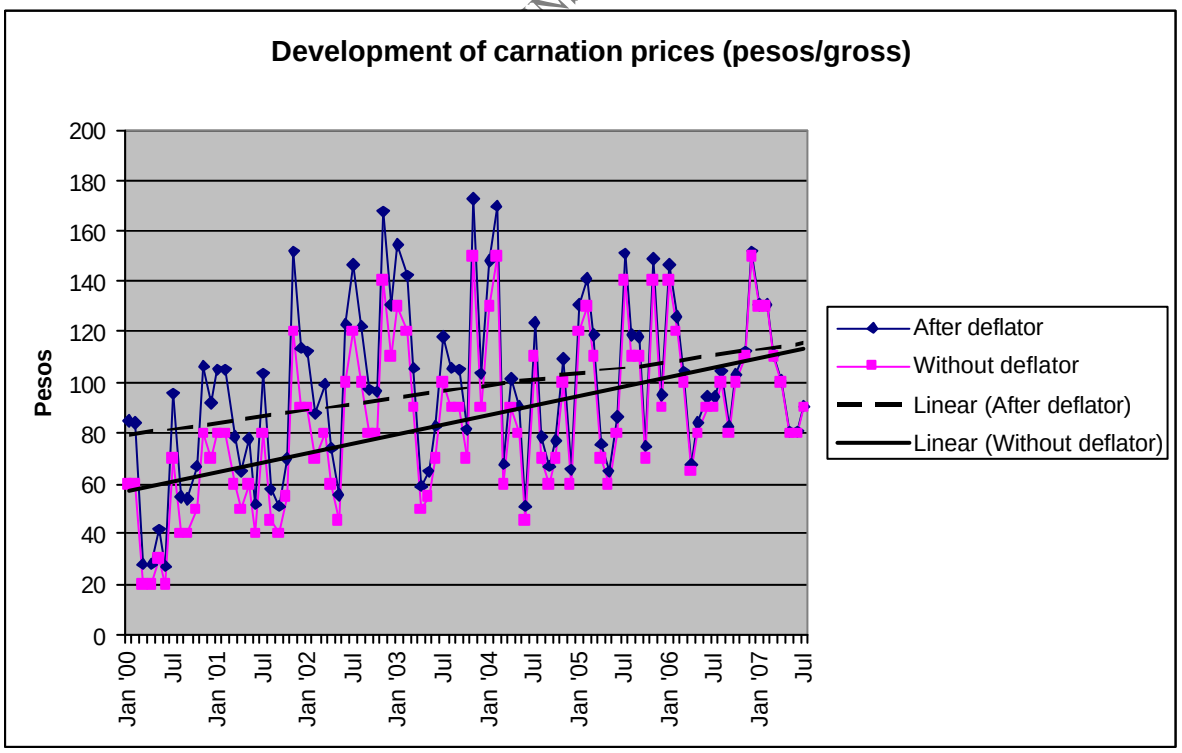
CHIHUAHUA	2001	2002	2003	2004	2005	2006
TOTAL SIAP	**0**	**9**	**40**	**40**	**0**	**4**
TOTAL CORRECTED [1]	**0**	**9**	**40**	**40**	**0**	**4**
Marigold	0	0	0	0	0	0
Marigold corr. [1]	0	0	0	0	0	0
Gladiolus	0	0	0	0	0	0
Chrysanthemum	0	0	0	0	0	4
Rose	0	0	0	0	0	0
Gypsophila	0	0	0	0	0	0
Carnation	0	0	0	0	0	0
Pom-pom Chr.	0	0	0	0	0	0
Matthiola	0	0	0	0	0	0
Tuberosa	0	0	0	0	0	0
Sunflower	0	9	40	40	0	0
Sea Lavender	0	0	0	0	0	0
Bird of Paradise	0	0	0	0	0	0
"Terciopelo"	0	0	0	0	0	0
African Lily (Agapanthus)	0	0	0	0	0	0
Other	0	0	0	0	0	0

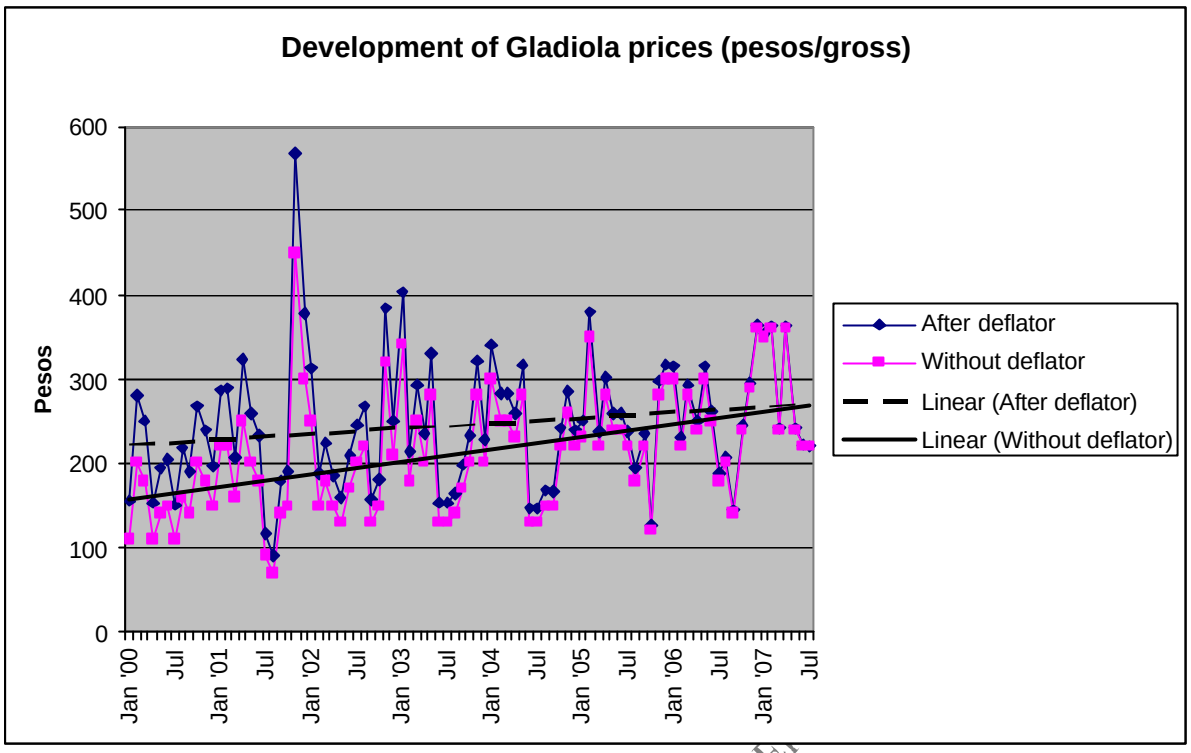
BAJA CALIFORNIA SUR	2001	2002	2003	2004	2005	2006
TOTAL SIAP	**0**	**0**	**0**	**0**	**0**	**0**
TOTAL CORRECTED [1]	**0**	**0**	**0**	**0**	**0**	**0**
Marigold	0	0	0	0	0	0
Marigold corr. [1]	0	0	0	0	0	0
Gladiolus	0	0	0	0	0	0
Chrysanthemum	0	0	0	0	0	0
Rose	0	0	0	0	0	0
Gypsophila	0	0	0	0	0	0
Carnation	0	0	0	0	0	0
Pom-pom Chr.	0	0	0	0	0	0
Matthiola	0	0	0	0	0	0
Tuberosa	0	0	0	0	0	0
Sunflower	0	0	0	0	0	0
Sea Lavender	0	0	0	0	0	0
Bird of Paradise	0	0	0	0	0	0
"Terciopelo"	0	0	0	0	0	0
African Lily (Agapanthus)	0	0	0	0	0	0
Other	0	0	0	0	0	0

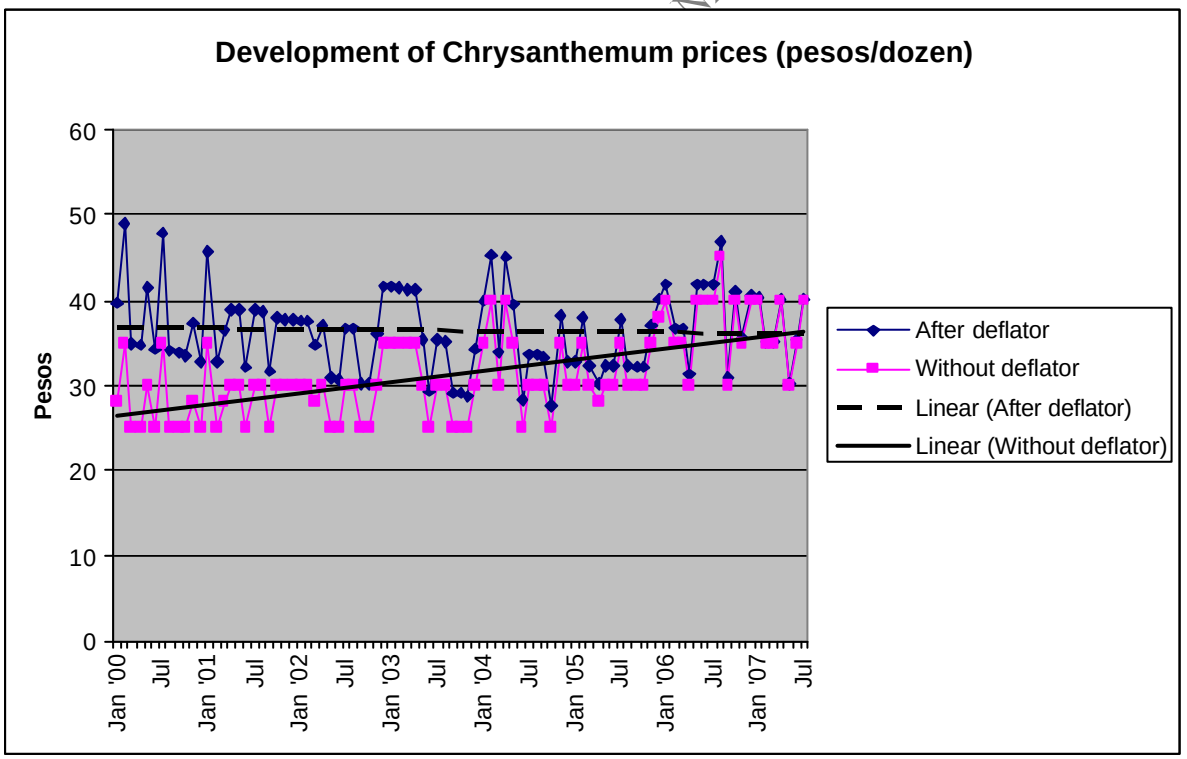
COAHUILA	2001	2002	2003	2004	2005	2006
TOTAL SIAP	**0**	**3**	**3**	**4**	**0**	**0**
TOTAL CORRECTED [1]	**0**	**3**	**3**	**4**	**0**	**0**
Marigold	0	0	0	0	0	0
Marigold corr. [1]	0	0	0	0	0	0
Gladiolus	0	0	0	0	0	0
Chrysanthemum	0	0	0	0	0	0
Rose	0	0	0	0	0	0
Gypsophila	0	0	0	0	0	0
Carnation	0	0	0	0	0	0
Pom-pom Chr.	0	0	0	0	0	0
Matthiola	0	0	0	0	0	0
Tuberosa	0	0	0	0	0	0
Sunflower	0	0	0	2	0	0
Sea Lavender	0	0	0	0	0	0
Bird of Paradise	0	0	0	0	0	0
"Terciopelo"	0	0	0	0	0	0
African Lily (Agapanthus)	0	0	0	0	0	0
Other	0	3	3	2	0	0

ANNEX 2.2 PRICE DEVELOPMENT MAIN CUT FLOWER VARIETIES









Source: Elaborated by the Office of the Agricultural Counsellor (Friso Klok) based on prices from the Secretaría de Economía, Sistema Nacional de Información e Integración de Mercados (SNIIM)

Notes: Deflator: Statistical tool provided by Rabobank International to convert current peso into inflation-adjusted pesos in order to compare prices in real terms after effects of inflation (see annex 1.2).
Dozen = 25 pieces
Gross = 144 pieces

ANNEX 2.3 MAIN PRODUCERS OF CUT FLOWERS (MEXICO)

Office of the Agricultural Counsellor – Netherlands Embassy in Mexico

Version: 17-12-2007

- STATE OF BAJA CALIFORNIA

Name of company:	**Rancho Twins**
Contact and position:	Jose Antonio Mendoza Padilla - Socio
Address:	Km 2 Carretera la Bufadora parcela 107, Colonia Maneadero, CP 22790, Ensenada, Baja California.
Tel.	+ 52-646 154 17 35
Fax:	+ 52-646 154 17 65
E-mail:	rancho_twins@hotmail.com
Website:	N.A.(2)
Product:	Sunflower, carnation, liciantus, lilies
Activities (size – tech):	Production and exports (300 has. – open field)

Name of company:	**Fiesta Farms**
Contact and position:	Miguel van Beek – General Manager
Address:	Km 91.5 Carretera Ensenada – Tecate, Colonia Maneadero, CP 22790, Ensenada, Baja California
Tel.	+ 52-646 120 64 39 ext. 15
Fax:	+ 52-646 120 64 39
E-mail:	miguel@fiestaflowers.com
Website:	N.A.(2)
Product:	Gladiola, sunflower, Asiatic lilies, larkspur, Transvaal daisy, snapdragon, etc.
Activities (size – tech):	Production and exports (65 has. – greenhouses and open field)

Name of company:	**Rancho Guaranty**
Contact and position:	Bernardino Garcia - Owner
Address:	Km. 25.5 Carretera Libre Tijuana-Ensenada, CP 22780, Rosadito, Baja California
Tel.	+ 52-646 154 09 82
Fax:	+ 52-646 154 09 82
E-mail:	bgg@telnor.net
Website:	N.A.(2)
Product:	(Mini) carnation
Activities (size – tech):	Production and exports (23 has. – greenhouses, open field)

Name of company:	**Rancho Flora West**
Contact and position:	Anglo Accedes Barajas - Owner
Address:	Maeander, Baja California
Tel.	+ 52-646 154 15 25
Fax:	+ 52-646 154 16 75
E-mail:	N.A.(2)
Website:	N.A.(2)
Product:	Sunflower, lily, stare, queen
Activities (size – tech):	Production and exports (50 has – open air)

Name of company:	**Rancho Daisy's**
Contact and position:	Hector Lara Soria - Representative
Address:	Km. 50 Carretera Tijuana – Ensenada, Colonia El descanso, CP 22712, Rosarito, Baja California
Tel.	+ 52 661 614 11 44
Fax:	+ 52 641 614 11 45
E-mail:	ranchodaisy@hotmail.com and randaisy@telnor.net and ranchodaisy@prodigy.net.mx
Website:	N.A.(2)
Product:	Wax flower, safari, myrtle, liciantus, snap dragon.
Activities (size – tech):	Production and exports (16 has. – greenhouses and open field)

Name of company:	**Rancho Hermanos Cárdenaz**
Contact and position:	Cesar Kennedy Cardenaz – Owner
Address:	CP 22790, Maneadero, Baja California
Tel.	+ 52-646 154 26 68
Fax:	+ 52-646 154 26 68
E-mail:	rancho_cardenas@hotmail.com
Website:	N.A.(2)
Product:	Chrysanthemum, gladiola, carnation, nardo
Activities (size – tech):	Production and exports (10 has. – greenhouses)

Name of company:	**Rancho las dos Palmas**
Contact and position:	J. Guadalupe Machain Gonzalez – Owner
Address:	Canon el descanso, Baja California
Tel.	+ 52-661 614 14 40
Fax:	+ 52-661 614 14 43
E-mail:	jav_rodriguez@hotmail.com
Website:	N.A.(2)
Product:	Carnation, rose
Activities (size – tech):	Production and exports (8 has – greenhouses)

Name of company:	**Rancho El Toro**
Contact and position:	Manuel Aguirre Ulloa – Owner
Address:	Km. 28 Carretera Libre Tijuana-Ensenada, CP 22780, Rosarito, Baja California
Tel.	+ 52-661 612 20 88
Fax:	+ 52-661 615 13 15
E-mail:	cardon2005@hotmail.com
Website:	N.A.(2)
Product:	Carnation, bird of paradise
Activities (size – tech):	Production and exports (7 has – greenhouses and open field)

Name of company:	**La Rosalera**
Contact and position:	Victoria Hernandez – Owner
Address:	Canon el descanso, Baja California
Tel.	+ 52-661 614 11 24
Fax:	+ 52-661 612 20 88
E-mail:	cardon2005@hotmail.com
Website:	N.A.(2)
Product:	Carnation
Activities (size – tech):	Production and exports (7 has – greenhouses)

Name of company:	**Invernaderos del Pacifico**
Contact and position:	Jose Luis Islas Contreras – Owner
Address:	La mision, Baja California
Tel.	+ 52-646 155 00 44
Fax:	+ 52-646 155 00 45
E-mail:	josegislas@hotmail.com
Website:	N.A.(2)
Product:	(Mini) carnation, chrysanthemum, bird of paradise
Activities (size – tech):	Production and exports (2,5 has – greenhouses)

- STATE OF CHIAPAS

Name of company:	**Finca Argovia Div. Flores, Río Cuilco**
Contact and position:	Jorge Giesemann - Manager
Address:	37 Pte, No.5, Colonia 5 de febrero, CP 30700, Tapachula, Chiapas
Tel.	+52-962 626 50 55 and +52-962 626 91 82
Fax:	+52-962 626 31 99
E-mail:	riocuilco@cuilcovalley.com.mx
Website:	www.cuilcovalley.com.mx
Product:	Tropical foliage, anthuriums
Activities (size – tech):	Production and exports (20 has. - greenhouses, mesh shadow, open field)

Name of company:	**Chiapas Flower**
Contact and position:	Rainier Boehme Winkler - Manager
Address:	9ª Avenida Norte 135-A, Colonia Jardines del Tacaná, CP 30720, Tapachula, Chiapas
Tel.	+ 52-962 626 42 88 and +52-962 625 63 34
Fax:	+ 52-962 625 63 34
E-mail:	chiapasflower@prodigy.net.mx and chflow@prodigy.net.mx
Website:	www.chiapasflower.com.mx
Product:	Anthurium, foliage pink ginger, red ginger, heliconia, cymbidium, bird of paradise.
Activities (size – tech):	Production and exports (5 has. – greenhouses, mesh shadow, open field)

- STATE OF COLIMA

Name of company:	**Viveros de Colima**
Contact and position:	Patrick Patón - Representative
Address:	Juan Alvarez No. 1010, Lomas Vista, Hermosa Colima, CP 28016 Colima
Tel:	+ 52-312 314 48 78 and +52-312 314 78 35
Fax:	N.A.(2)
E-mail:	ventas@viverosdecolima.com.mx
Website:	www.viverosdecolima.com.mx
Product:	Pot plants and various cut flowers
Activities (size – tech):	Production and commercialization (5 has. - mesh shadow, open field)

Name of company:	**Viveros Valles Verde**
Contact and position:	León Machuca González- Representative
Address:	Colonia La Esperanza, Coquimatlán, Colima
Tel:	+ 52-312 320 91 85
Fax:	+ 52-312 330 99 44
E-mail:	coepplants@yahoo.com.mx
Website:	N.A.(2)
Product:	N.A.(2)
Activities (size – tech):	Production (15 has. - mesh shadow, open field)

Name of company:	**Viveplants**
Contact and position:	Fidel Maza Selvas - Manager
Address:	Calle Morelos No. 9 Col. Santiago, CP 28860, Manzanillo, Colima
-Mexico City office:	Guillermo Prieto 61 int. 13 15800, Mexico City
Tel:	+ 52-314 333 13 73
-Mexico City office:	+ 52-55 57 40 16 77 and +52-55 27 55 44 27
Fax:	+ 52-312 330 99 44
E-mail:	viveplants@hotmail.com
Website:	www.viveplants.com
Product:	Orchid, rose, aster, calla, polar, bird of paradise, dendrobium
Activities (size – tech):	Production (4 has. - mesh shadow)

- STATE OF DISTRITO FEDERAL

Name of company:	**Beltrán Ramos Gabriel Francisco**
Contact and position:	Beltrán Ramos Gabriel Francisco - Owner
Address:	B. de la Luz 777 Casa 7 Jardines del Pedregal, México D.F.
Tel.	+ 52-55 55 68 66 11
Fax:	+ 52-55 56 52 21 76
E-mail:	Gabriel2001@prodigy.net.mx
Website:	N.A.(2)
Product:	Rose and other flower varieties
Activities (size – tech):	Production (12 has – greenhouses)

- STATE OF JALISCO

Name of company:	**Camflor**
Contact and position:	Javier Campos - Manager
Address:	Carretera Guadalajara – Saltillo Km. 50, CP 45260, Ixtlahuacán, Jalisco
Tel.	+ 52-373 734 50 54 and +52-333 823 94 47
Fax:	+ 52-373 734 51 33
E-mail:	daniel@camflor.com and camflormx@yahoo.com.mx
Website:	www.coxflor.com
Product:	Delphiniums, statice sinuata, sunflower
Activities (size – tech):	Production and exports (20 has – open field)

- STATE OF MEXICO

Name of company:	**Coxflor**
Contact and position:	José Angel Beltrán - Owner Marco Antonio Beltrán - Manager
Address:	Héroes del 14 de septiembre # 20 51760 Villa Guerrero, Estado de México
-Production:	Rancho Colorado - Carretera Federal Toluca-Ixtapan de la Sal Km. 60, CP 51760, Villa Guerrero, Estado de México
Tel.	+ 52-714 146 00 34 and +52-714 146 08 32
Fax:	+ 52-714 146 00 67 and +52-714 146 00 11
E-mail:	ventas@coxflor.com and coxflor@prodigy.net.mx and mabeltranb@coxflor.com
Website:	www.coxflor.com
Product:	Roses, oriental and asiatic lilies, gerberas, tulips, alstroemeria, gladioli, fillers
Activities (size - tech):	Production and exports (At least 40 has. - greenhouses)

Name of company:	**Flores de Chiltepec**
Contact and position:	Ing. Rogelio Olascoaga - Owner
Address:	Antiguo Camino a Chiltepec-Coatepec Harinas s/n, CP 51750, Estado de México
Tel.	+ 52-723 147 40 91 and +52-723 147 40 92 and +52-723 147 40 93
Fax:	+ 52-723 147 40 95
E-mail:	jparra@chiltepec.com and rolascoaga@chiltepec.com and comercializadorachiltepec@prodigy.net.mx
Website:	www.chiltepec.com
Products:	Roses and spray roses, phaleanopsis orchids, oriental and asiatic lilies, tulips, mini gerbera, iris, etc
Activities (size – tech):	Production and exports (20 has. – greenhouses and 5 has. – greenhouses in Veracruz)

Name of company:	**Flores de San Francisco**
Contact and position:	Ing. Arturo Pérez Sánchez – Owner
Address:	Av. Coxcacoaco s/n - Antiguo Camino a Buenavista y Arroyo del Muerto s/n, CP 51760, Villa Guerrero, Estado de México
Tel:	+ 52-714 146 13 07 and +52-714 146 13 08
Fax:	+ 52-714 146 05 25
E-mail:	psafsf@prodigy.net.mx
Website:	N.A.(2)
Product:	Roses, gerberas, iris
Activities (size - tech):	Production and exports (19 has. – greenhouses, open field)

Name of company:	**Rancho Los Oyameles**
Contact and position:	Arturo Guadarrama – Owner Connie Guadarrama - Manager
Address:	Aldama # 73, Col. Centro, CP 51760, Villa Guerrero, Estado de México
Tel.	+ 52-714 146 00 27 and +52 714 146 01 33
Fax:	+ 52-714 146 09 52
E-mail:	oyameles@prodigy.net.mx
Website:	www.oyameles.com. mx
Product:	Roses, gerberas, asiatic & oriental lilies, iris, spray roses, alstroemeria
Activities (size – tech):	Production and exports (7 has. - greenhouses, mesh shadow)

Name of company:	**Flores Los Reyes**
Contact and position:	Victor Bernal Guadarrama - Owner
Address:	Km. 2.5 s/n Carretera San José, CP 51760, Villa Guerrero, Estado de México
Tel.	+ 52-714 146 06 32
Fax:	+ 52-714 146 08 28
E-mail:	N.A.(2)
Website:	N.A.(2)
Product:	Roses, gerberas
Activities (size – tech)	Production and exports (6 has. – greenhouse and open air)

Name of company:	**Union de Productores de Flores Los Morales, 14 producers (Rancho Los Morales)**
Contact and position:	Víctor Villa Blanco - Manager
Address:	Coyotzin 266 Col. Electric istas, Toluca, Estado de México
Tel.	+ 52-722 215 81 83 and + 52-722 214 26 56
Fax:	+ 52-714 142 73 73
E-mail:	rodrigovilla@hotmail.com
Website:	N.A.(2)
Product:	Carnations, roses, gladioli, gerbera, lilies
Activities (size - tech):	Production and exports (100 has. - greenhouses)

Name of company:	**Cosmoflor**
Contact and position:	Marco Ramírez Ponce - President
Address:	Km. 64.5 Carretera Federal Toluca – Ixtapan de la Sal, Colonia los Arroyos, CP 51760, Villa Guerrero, Estado de México
Tel.	+ 52-714 146 07 98 and +52-714 146 07 99
Fax:	+ 52-714 146 05 77
E-mail:	ttellez@cosmoflorgrowers.com.mx and mramirez@cosmoflorglowers.com.mx
Website:	www.cosmoflowgrowers.com.mx
Product:	Roses
Activities (size – tech)	Production and exports (50 has. - greenhouses)

Name of company:	**Mexflowers Premium**
Contact and position:	Ing. Martiniano Peña Maldonado - Manager
Address:	Km 8.3 Carretera Tenancingo – Zumpahuacán, Zumpahuacán, Estado de México
Tel.	+52-714 142 21 13
Fax:	+52-714 142 15 02
E-mail:	ranchoempaque@hotmail.com
Website:	N.A.(2)
Product:	Rose, bird of paradise, alstroemeria, limonium
Activities (size – tech):	Production (30 has. - greenhouses, open field)

Name of company:	**Rancho La Era**
Contact and position:	Estuardo Díaz Gazca - Manager
Address:	Sn. José Progreso, CP 51700,
Tel.	+ 52-723 145 02 03
Fax:	+ 52-723 145 02 03
E-mail:	imestuardo@yahoo.com
Website:	N.A.(2)
Products:	Heliconia, bird of paradise, aggies blue & white
Activities (size – tech):	Production and exports (18,5 has. - open field)

Name of company:	**Chávez Velazquez Jose Jaime**
Contact and position:	Chávez Velazquez Jose Jaime - Owner
Address:	Cuauhtémoc S/N Santa Ana Tenancingo, Estado de México
Tel.	+ 52-714 142 23 65
Fax:	+ 52-714 142 07 99
E-mail:	chavelji@hotmail.com
Website:	N.A.(2)
Product:	Roses, lilies
Activities (size – tech):	Production and exports (20 has. – greenhouses)

Name of company:	**Super Rosa Monrog**
Contact and position:	Irma Rodríguez - Owner Norma Rodríguez - Owner
Address:	Barrio de Jesús Carranza s/n, CP 51760, Villa Guerrero, Estado de México
Tel.	+ 52-714 146 03 30
Fax:	+ 52-714 456 04 63
E-mail:	ventas@monrog.com
Website:	www.monrog.com
Product:	Roses
Activities (size – tech):	Production and exports (11 has. - greenhouses)

Name of company:	**Rancho Los Nogales**
Contact and position:	Vicente Chávez - Manager
Address:	Juárez 29 Santa Ana, Tenancingo Estado de México
Tel.	+ 52-714 142 12 63 and + 52 722 264 21 32
Fax:	+ 52-714 142 74 16
E-mail:	cmf@conmexflor.org
Website:	N.A.(2)
Product:	Roses, oriental & asiatic lilies, gerberas, alstroemeria, aggies blue & white, agapanthus
Activities (size - tech):	Production and exports (9,5 has. – greenhouses, open field)

Name of company:	**Flores la Vereda**
Contact and position:	Alfonso Duque Tovar - Owner
Address:	Km. 2 camino antiguo Sn. José - Villa de Allende, CP 51030, Donato Guerra, Estado de México
Tel.	+ 52-726 251 53 47
Fax:	+ 52-726 251 53
E-mail:	floreslavereda@yahoo.com.mx and elmorro@prodigy.net.mx
Website:	www.floreslaverada.com.mx
Product:	Roses, alstroemeria
Activities (size – tech)	Production and exports (8 has. - greenhouses)

Name of company:	**Azteca Floral Farms**
Contact and position:	Jorge Bernal - Manager
Address:	Carretera a San José San Lucas, CP 51760, Villa Guerrero, Estado de México
Tel.	+ 52-722 264 12 28 and +52-714 146 06 32
Fax:	+ 52-714 146 08 28
E-mail:	jbazteca@prodigy.net.mx and aztecafloral@prodigy.net.mx
Website:	N.A.(2)
Product:	Roses, gerberas, alstroemeria, mini carnation, aster, solidago
Activities (size – tech):	Production and exports (8 has. – greenhouses)

Name of company:	**Rancho Santo Tomás**
Contact and position:	Rosario Polo – Owner
Address:	Domicilio Conocido, Ejido los Morales Tenancingo, Estado de México
Tel.	+ 52-714 142 34 44 and +52-714 142 46 48
Fax:	+ 52-714 142 34 44
E-mail:	floresstotomas@yahoo.com.mx and ranchosantotomas@yahoo.com.mx and rosariopolo@yahoo.com.mx
Website:	N.A.(2)
Product:	Roses, gerberas
Activities (size - tech):	Production and exports (7 has. - greenhouses)

Name of company:	**Invernaderos Xcaret**
Contact and position:	Alejandro Barnal Camacho - Owner
Address:	San Mateo Coapexo, Villa Guerrero, Estado de México
Tel.	+ 52-714 146 00 42
Fax:	N.A.(2)
E-mail:	acamacho67@hotmail.com
Website:	N.A.(2)
Product:	Limonium, aster, matsumoto
Activities (size – tech):	Production (6 has. - greenhouses)

Name of company:	**Mundiflor**
Contact and position:	Ernesto Klein Hertiger - Owner
Address:	Libertad S/N, Colonia San Mateo Coapexco, Villa Guerrero, CP 51760, Estado de México
Tel.	+ 52-714 144 71 19 and + 52-714 144 71 19
Fax:	+ 52-714 144 71 18
E-mail:	mundiflor@prodigy.net.mx
Website:	www.mundiflor.com.mx
Product:	Gerberas, birds of paradise
Activities (size – tech)	Production (5 has. – open air)

Name of company:	**Bautista Pardo Froylán**
Contact and position:	Ayala Mendoza Jesús Gabriel - Owner
Address:	D/C Ejido de San Mateo Coapexco Villa Guerrero, Estado de México
Tel.	+ 52 714 146 08 68
Fax:	N.A.(2)
E-mail:	cmf@conmexflor.org(3)
Website:	N.A.(2)
Product:	Rose
Activities (size – tech):	Production (5 has – greenhouses)

Name of company:	**Masagar**
Contact and position:	Manuel Salvidar - Owner
Address:	Km 62.5 carretera Federal Toluca-Ixtapan de la Sal, CP 51760, Villa Guerrero, Estado de México
Tel.	+ 52-714 146 13 75 and +52-714 146 14 86
Fax:	+ 52-714 146 13 74
E-mail:	masagarvgr@hotmail.com and mirellamasagar@hotmail.com
Website:	N.A.(2)
Product:	Roses, gerbera, lily, etc.
Activities:	Production and exports (5 has. - greenhouses)

Name of company:	**Estrada López Bernabé**
Contact and position:	Estrada López Bernabé - Owner
Address:	Hidalgo S/N Zacango, La Baja, Estado de México
Tel.	+ 52 714 144 76 96
Fax:	N.A.(2)
E-mail:	cmf@conmexflor.org(3)
Website:	N.A.(2)
Product:	Polar
Activities (size – tech):	Production (5 has – greenhouses)

Name of company:	**Viveros el Volcán**
Contact and position:	Rolf Schoenfeld - Director
Address:	Barrio Zacanguillo s/n Apdo. Postal No.1, CP 51700, Coatepec de Harinas, Estado de México
Tel.	+ 52-723 145 07 60 and +52-723 145 07 61
Fax:	+ 52-723 145 07 63
E-mail:	viverosvolcan@prodigy.net.mx
Website:	N.A.(2)
Product:	Gerbera, carnation, rose
Activities (size – tech)	Production and exports (4.3 has - greenhouses)

Name of company:	**Grupo Mexbloom**
Contact and position:	Juan Estrada Bernal - Manager
Address:	Km. 60 Carretera Federal Toluca Ixtapan de la Sal, Sn Francisco, CP 51760, Villa Guerrero, Estado de México
Tel.	+ 52-714 146 29 64
Fax:	+ 52-714 146 16 04
E-mail:	gmexbloom@prodigy.net.mx
Website:	www.grupomexbloom.com.mx
Product:	Tropical flowers: ginger, heliconia, gerbera, sunflower, gladioli
Activities (size – tech):	Production and exports (4 has. - greenhouses)

Name of company:	**Rancho Los Pilares**
Contact and position:	Javier Migoya von Bertrab - Owner
Address:	Km. 7.5 Santa Cruz,Carretera Tenancingo-Zumpahuacán, Zumpahuacán, Estado de México
Tel.	+ 52-714 142 34 24 and +52 714 142 34 25
Fax:	+ 52-714 142 27 00
E-mail:	lospilares@prodigy.net.mx
Website:	www.rancholospilares.com
Product:	Aster, phlox, limonium, mini carnation, delphinium
Activities (size – tech):	Production and exports (3 has. - greenhouses)

Name of company:	**LobeFlor**
Contact and position:	Rodolfo López - Owner
Address:	Calle 5 de Mayo No. 3, CP 51760, Villa Guerrero, Estado de México
Tel.	+ 52-714 146 00 65
Fax:	+ 52-714 146 00 65
E-mail:	lobeflor@mail.dsinet.com.mx
Website:	N.A.(2)
Product:	Rose, carnation, nardo, etc.
Activities (size – tech):	Production and exports (2,5 has. – greenhouses)

Name of company:	**Flores Tapatías**
Contact and position:	Gustavo Iñiguez Jiménez - Owner
Address:	Domicilio Conocido Barrio del Aguacate Dulce, CP 51760, Villa Guerrero, Estado de México
Tel.	+ 52-714 146 24 48
Fax:	+ 52-714 142 37 29
E-mail:	florestapatias@prodigy.net.mx
Website:	N.A.(2)
Product:	Roses
Activities:	Production and exports (2 has. - greenhouses)

- STATE OF MICHOACAN

Name of company:	**Corporativo Flores Paraíso**
Contact and position:	Fernando Yáñez – Owner Andres García - Manager
Address:	Carretera Ziracuarétiro – Uruapan No. 130, Colonia El Fresno, CP 61700, Ziracuarétiro, Michoacán.
Tel.	+ 52-452 527 14 07 and +52-423 593 04 72
Fax:	+ 52-452 527 14 07
E-mail:	info@paraisoflowers.com and feryanez@paraisoflowers.com
Website:	www.paraisoflowers.com.mx
Product:	Bird of paradise
Activities (size – tech):	Production and exports (40 has. – open field)

Name of company:	**Rancho Colibri**
Contact and position:	Jaime Zamora Pérez - Owner
Address:	Atenas No. 19 Frac. La Joyita, CP 60170, Uruapan, Michoacán
Tel:	+ 52-452 523 57 44
Fax:	+ 52-452 523 97 00
E-mail:	rcolibri@intermatsa.com.mx
Website:	www.ranchocolibri.com
Product:	Birds of paradise
Activities (size – tech):	Production and exports (20 has. – tunnels, open field)

Name of company:	**Invernaderos de Zitacuaro**
Contact and position:	Mauricio Gonzalez - Manager
Address:	Cuahutémoc Ote. 11 Centro, CP 61500, Zitacuaro, Michoacán.
Tel.	+ 52-715 153 32 77
Fax:	+ 52-715 153 70 50
E-mail:	invernaderos@izi.com.mx and mauriciogh@izi.com.mx
Website:	N.A.(2)
Product:	Heliconia, hybrid lilies, asiatic lilies, oriental lilies, tulips
Activities (size – tech):	Production and exports (5 has. - greenhouses)

Name of company:	**V + B Floraplant**
Contact and position:	Dieter Vermehren - Manager
Address:	Rancho la Cofradia s/n, Colonia de Guadelupe, Tuxtpan, Michoacán
Tel.	+ 52-786 155 01 01
Fax:	+ 52-786 155 03 92
E-mail:	natflow@prodigy.net.mx
Website:	N.A.(2)
Product:	Pelargonium
Activities (size – tech):	Production and exports (2,5 has. - greenhouses).

- STATE OF NUEVO LEON

Name of company:	**Flores de Altura (Invernadero Sierra Alta)**
Contact and position:	Geronimo Huemac Cordova – Produccion manager
Address:	Angela Peralta No. 180 Sur, Col. Seminario, Monterrey, Nuevo Leon
Tel.	+ 52-818 378 07 77
Fax:	+ 52-818 378 07 77
E-mail:	N.A.(2)
Website:	N.A.(2)
Product:	Pot plants, pensamiento, petunias
Activities (size – tech):	Production and exports (3 has. – greenhouses, open field)

- STATE OF PUEBLA

Name of company:	**Florisol**
Contact and position:	Guillermo López – Manager Ernesto Maurer Espinosa – General Director
Address:	Nexatengo, CP 74160, Atlixco, Puebla
Tel.	+ 52-244 446 03 23 and +52-244 446 03 03
Fax:	+ 52-244 446 03 13
Email:	gmmatriz@hotmail.com and invernaderosflorisol@yahoo.com
Website:	N.A.(2)
Product:	Roses, gladioli
Activities (size – tech)	Production and exports (45 has. – greenhouses and open field)

Name of company:	**Viveros Atlixco**
Contact and position:	Jorge Cruz - Manager
Address:	Héroes del 4 de Mayo No.3, Colonia Cabrera, CP 74360, Atlixco, Puebla
Tel.	+ 52-244 445 61 45
Fax:	+ 52-244 445 61 49
E-mail:	atlixcoviveros2@yahoo.com.mx and bulbosatlixcoviveros@yahoo.com
Website:	www.atlixcoviveros.com
Product:	Heliconia, white arum lily, gladioli, tulips, tuberoses, fillers: aster, statice, solidago
Activities (size – tech):	Production and exports (35 has. – greenhouses, open field)

Name of company:	**Rancho La Joya**
Contact and position:	Gustavo Escobar – Gerente de producción
Address:	Domicilio Conocido Col. Juan Uvera, Colonia Juan Uvera, CP 74200, Puebla
Tel.	+ 52-244 445 32 99 and +52-244 445 44 88
Fax:	+ 52-244 445 34 91
E-mail:	N.A.(2)
Website:	N.A.(2)
Product:	Gladiola, limonium, orquids, etc.
Activities (size – tech):	Production and exports (N.A.(2) – greenhouses)

- STATE OF SINALOA

Name of company:	**Juan Cristóbal**
Contact and position:	Jesús Gonzalo Pérez - Manager
Address:	Macario Gaxiola No. 30, CP 81000, Guasave, Sinaloa
Tel.	+ 52-687 872 90 64 and +52-687 878-01-91
Fax:	+ 52-687 872 90 64
E-mail:	jgperez@gve.megared.net.mx
Website:	N.A.(2)
Product:	Gladioli, limonium, liatris
Activities (size – tech)	Production and exports (6 has. - greenhouses, mesh shadow, open field)

Name of company:	**Divine Blooms**
Contact and position:	Joaquín Vega - Manager
Address:	Santos Degollado No. 517, colonia centro, CP 81200, Los Mochis, Sinaloa
Tel.	+ 52-668 818 66 88
Fax:	+ 52-667 760 14 38
E-mail:	jvega@divineblooms.com
Website:	N.A.(2)
Product:	Snapdragon, sunflower, waxflower
Activities (size – tech):	Production and exports (N.A.(2) – greenhouses)

- STATE OF YUCATAN

Name of company:	**Flores Finas de Teya**
Contact and position:	Fernando Poblano - Manager
Address:	Km. 11.2 Carretera Mérida – Puerto Juárez, Hacienda Teya, CP 97370, Kanasín, Yucatán
Tel:	+ 52-999 988 09 05
Fax:	+ 52-999 988 12 87
E-mail:	info@floresfinasteya.com
Website:	www.floresfinasteya.com
Product:	Rose, anthurium, heliconia, limonium, phaleanopsis orchid, papiro, bromelliad
Activities (size – tech)	Production and exports (15 has. – greenhouses, open field)

Sources:

- Mexican Flower Council (Consejo Mexicano de la Flor)
- Contacts of the Office of the Agricultural Counsellor
- Guía Verde México (ornamental sector directory)
- Magazine 2000Agro, article Marchita Floricultura Medio Ambiente

Notes:

(1) For telephone or fax communication, dial +52 followed by the city and phone/fax number when calling from outside Mexico. Dial +01 followed by the city and phone/fax number from calling from within Mexico. If you are in the same city, omit +52 and +01.
(2) N.A. - Not Available
(3) E-mail: cmf@conmexflor.org belongs to the Mexican Flower Council. Some companies do not have their own e-mail, and the CMF can contact them.

(4) size - tech: size measured in hectares, tech: technology level, ranging from highest to lowest: greenhouses, tunnel, mesh shadow and open field

ANNEX 2.4 COMPETITIVENESS MEXICAN CUT FLOWER INDUSTRY

Colombia, Ecuador, The Netherlands, Canada and Costa Rica are Mexico's main competitors in respect to the US market. The other markets are not very important for Mexico. As pointed out through the report 96% of the export of Mexican cut flowers finds their way into the US market.

Comparing the major cut flower producing countries and suppliers of the US market and expressing the main parameters in scores, the competitiveness of Mexico as supplier of the US market is comparable with the competitiveness of the Colombia flower exporters. The scores are based on perceptions of Dutch companies in international trade.

- Colombia

Colombia is the main Latin America producer. It occupies also the first position on the list of most important importing countries of cut flowers in the United States and it can export duty free to the US. Colombia has an excellent score (5) on the ability to export cut flowers of a consistent quality year round, it has a good score on production cost (4) and also the Colombia image as a cheap provider is good (4). Quality of Colombian flowers could be better due to the extra air transport and the consecutive road transport from Miami to the main populated areas. The reliability of the Colombian flower industry is not as good as the reliability of the Netherlands due to problems in supply in peak periods.

- Ecuador

Ecuador is the second flower exporter to the US after Colombia. Some scores of the Ecuadorean flower industry, no. 2 on the list of cut flower exporting countries to the US are the same as those of Colombia. Its' image as a cheap provider (3) however is not as good as Colombia's price image, mainly caused by the totally different type of rose, compared to Colombia. Sales costs (1) are comparable with sales cost in Colombia. The Ecuadorean exporters are not known for their reliability (3) as a provider.

- The Netherlands

The Netherlands has a long history of plant breeding in floriculture and it is a very diverse and innovative industry. It fulfils a leading role in the world. The Netherlands has a large home market but also occupies a leading role in exports. It is no. 3 on the list of most important importing countries of cut flower in the US. The Netherlands has good scores (4) on the ability to export cut flowers of a consistent quality year round and the flowers are flown straight to the populated areas, on assortment (4) and on quality (4). The Netherlands is known as a very reliable provider (4) but it has a low score on production cost (1), sales cost, including transport cost (1) and it is therefore not known as a cheap provider (1).

- Canada

Canada is no. 4 on the list of cut flowers exporting countries to the US. Due to severe winters in the south-eastern parts of Canada it has a low score (2) as a year round provider and also production cost is higher than in Colombia and Ecuador. Canada's sales cost are much lower (5) as from Colombia and Ecuador due to the proximity of the populated areas in the northeast of the US and the fact that road transport is relatively cheap. Canada has quite a wide assortment (4), a good quality (4), also caused by transport on water. Canadian flower however are not known for its low price (2). Canada is a reliable supplier (4).

- Costa Rica

Costa Rica is no. 5 on the list of cut flowers exporting countries to the US. Within Central America it has the strongest competitive position thanks to the export orientated infrastructure, experience with foreign investments and a high level of knowledge in respect to floriculture. The year round ability is good but production cost (3) is higher than in Colombia and Ecuador. Sales cost (2) is comparable with the Colombian and Ecuadorean sales cost, assortment is poor (1), quality only moderate (2) and the price image (3) and reliability (3) are comparable to Colombia and Ecuador.

COMPARISON OF COMPETITIVENESS ON THE US MARKET[1] (2007)

	Colombia	**Ecuador**	**Netherlands**	**Canada**	**Costa Rica**	**Mexico**
Year round ability	5	5	4	2	4	4
Production costs[2]	4	4	1	2	3	4
Sales costs[3]	2	2	1	4	2	5
Assortment	3	2	4	3	1	4
Quality	3	3	4	4	2	2
Price image	4	3	1	2	3	5
Reliability	3	3	4	4	3	2
TOTAL	**24**	**22**	**19**	**21**	**18**	**26**

Source: Horticonsult BV

Note: 1. Scale: 1= least competitive – 5=most competitive
2. Labor, energy, chemicals, planting material, pesticides
3. Including transport to customer

- Mexico

Mexico is no. 6 on the list of cut flowers exporting countries to the US and miles ahead of no.7, India with approximately USD 10 mln. Although Mexico deals with some more changes in the yearly weather season it is still very well capable of exporting cut flowers to the US on a year round basis (4) with its' many micro climates and a wide range of altitudes. Production costs (5) are considered similar than in Colombia. Because of the road transport on water the sales cost (5) including transport is much lower than from all other competitor. Assortment in Mexico is rather extended but quality of Mexican flowers is still relatively poor (2), generally spoken. Mexico is known for its low production cost (5), not only for flowers, but unfortunately the reliability of the Mexican flower industry (2) does not yet meet international standards.

Conclusion

The competitiveness of the Mexican floriculture industry is better than the first 5 supplying countries. In particular parameters related to cost price as well as the price image Mexico has high scores. Improvements have to be made in quality and reliability. Assortment and its year round ability are no negative factors. Five from seven basic parameters to become a major supplier for the US market are positive compared to the main competing supplying countries on the US market.

COMPARISON OF COMPETITIVENESS IN THE CUT FLOWER INDUSTRY

	The Netherlands	Colombia	Ecuador	Mexico
Geography				
Climate				
Land & Raw Materials				
Labor				
Capital				
Infrastructure				
Knowledge				
Domestic Market				
Network				
Government				
Economic Variables				

poor/very poor & expensive
moderate
good
very good/amply available & cheap

Source: The Mexican Cut Flower Market, Rabobank

ANNEX 2.5 SWOT ANALYSIS

Strong points

- Many areas in Mexico provide good (micro) climates for growing a wide variety of flower species. However Mexico faces seasonal weather changes that makes it slightly more difficult to produce year-round consistent quality of certain flower species compared to Colombia and Ecuador
- Competitive labor costs in rural areas (comparable to Southern American producers) and relatively productive labor force
- Large national market that so far has absorbed the increased supply of cut flowers. The per capita spending on cut flowers of approximately US$ 10 is very large considering Mexico's PIB
- Proximity to the US and Canadian market
- Possibility to send cut flowers on water by truck to the US and Canada. All other exporting nations to these consumer's regions depend on air transportation before a further distribution by road transport

Weak points

- Production focused almost entirely on national market, therefore no benchmarking with international standards
- Lack of innovative forces in the field of propagation, production and distribution
- Full dependence on technology from abroad (plant material as well as technical equipment)
- Dependency on basic inputs (fertilizers , pesticides, plant material) from abroad
- Lack of quality consciousness
- Absence of willingness to compete in ever more competitive export market
- Fragmentation of national distribution system
- Fragmented small scale production resulting in a lack of uniform supplies of larger quantities for sales to big retailers
- Lack of chain integration
- Lack of government involvement in the regulation and stimulation of various aspects of the cut flower industry (environment, social aspects, distribution). The Sistema Producto Ornamentales (SPO) is aimed at improving the knowledge amongst growers in environmental, social aspects, the market, logistics and post harvest[4].
- Financing very difficult due to high interest rates

[4] Knowledge of these aspects are an even greater problem at wholesalers/distributors level

Opportunities

- Further development and improvement of the domestic market without strong foreign competition[5]
- Growing global awareness of sustainability of flower production
- Growing global awareness of reduction of transport
- American retailers seeking other supplier than Colombia because of image problem
- American retailers seeking more suppliers to avoid risks of short of supplies due to lack of airfreight capacity
- American retailers seeking more suppliers to avoid risks of weather related short of supplies from South America
- Increasing labor cost in Colombia and Ecuador
- Attracting foreign investment in industrial oriented cut flower production for the US market
- Branding Mexico as a friendly, modern and environmental responsible producer of cut flowers for the US and Canadian market

Threats

- Insufficient measures to improve environmental situation in production areas
- Increasing land prices in parts of the central highlands of Mexico
- Producers disability to co-operate in marketing, transport and promotional issues
- Development of long term cold storage systems and sea transport with the latest techniques by competitive flower industries in South America
- Increasing labor cost

[5] Mexico is still in the starting phase of the development of domestic consumption

ANNEX 2.6 THE GLOBAL MARKET OF CUT FLOWERS

An overview and explanation of global developments over the last 10 year and the forecasts can be of importance for the Mexican situation. Further development of the Mexican ornamental industry also depends on global development. Particularly the cut flower industry has become a global industry, where big traders are also sourcing globally and trying to expand their turnover by entering and developing markets with potential, such as the Mexican market. Consolidation of the relatively small group of globally oriented traders, could easily lead to the entrance of foreign traders into the Mexican ornamental industry.

Production

The global production of ornamental products is estimated[6] at least € 23 billion for cut flowers and potted plants, € 15 billion for nursery trees and € 0,7 billion for flower bulbs, bringing the total production value of ornamental products on approximately € 40 billion. Since 1975 the process of globalization in the cut flower industry is taking pace. Due to worldwide increasing consumption (3-4% at an average yearly base) production increased worldwide. Until 1975 there was only minor international trade of cut flowers, mainly by Dutch exporters and exporters from some other countries, in particular countries in southern Europe, exporting to nearby countries.

Because of increasing production costs, increasing energy prices this situation is changing dramatically. Production of cut flowers is shifting to low cost countries and the relative importance of the former export oriented production areas, e.g. The Netherlands, Israel and Italy and local production areas in high cost production area's throughout the globe is decreasing. New production areas nowadays are East- and Southern African countries (Kenya, Uganda, Tanzania, Ethiopia, Zimbabwe and Zambia), South- and Central American countries (Colombia, Ecuador, Costa Rica) and Asian countries (China, Vietnam, Malaysia, South Korea).

Since the 90's there is a clear development in regionalization of supplying countries in connection to consuming countries. African countries, Israel, as relative new production areas, are mainly producing for the European market. The Netherlands globally still plays a dominant role, both in production and in trade. However, in relative terms, the importance of The Netherlands is declining because production in low cost countries is increasing. Production in The Netherlands is stabilizing. Southern and Central American countries produce for the US and Canadian market. The relatively new Asian production areas produce for the sophisticated Japanese market and regions/cities like Singapore and Hong Kong and for the upcoming rich upper-class of Chinese cities. There is only relatively minor intercontinental trade of cut flowers[7], compared to the product flows as described above.

[6] Estimation by AIPH = International Association of Horticultural Producers in their Annual Statistical Book 2005

[7] In 2005 96,3% of all exported Dutch cut flowers were exported to other European countries, being EU member states as well as other European countries.

Segmentation consumer's market

Segmentation is another important change in the global cut flower market. Retail organizations are increasingly important players at the world market of cut flowers. Their purchase is focused on minimizing production and logistic costs and therefore they play an important role in the shift of production to low cost countries.

SHARE OF POINTS OF SALE (% OF TOTAL CONSUMPTION)

	Traditional	**Retail**
Netherlands	44 %	24 %
Germany	54 %	15 %
UK	27 %	58 %
France	67 %	13 %
Switzerland	28 %	51 %
Italy	73 %	4 %
Europe (average)	55 %	21 %
USA	56 %	23 %

Source: Flower Council of Holland

Economics of scale

Another result of the increasing trade and segmentation is the increasing farm size, in particular noticeable in low cost countries, where one can set up a flower farm 5-10 times bigger as in high cost industrialized countries with the same investment. This has big consequences for the speed in which production is increasing. But also in traditional production areas in Europe and North America farm size is increasing.

International production

Dutch producers started investing in Africa in the mid-nineties. Nowadays a few dozen Dutch producers exploit flower farms in African countries like, Kenya, Uganda, Tanzania, Zambia and lately Ethiopia. Governmental regulations on environmental issues, labor policy, increasing land prices and above all, increasing energy prices, play a role in the shift from developed, industrialized countries to low cost countries.

Dutch growers choose for Africa in their efforts for diversification of production areas because they still use their own marketing system: the Dutch auctions. This is important because generally speaking they do not want to be involved in trading. There are only a few Dutch flower growers investing in production capacity in South-America or Asia. There are no signs that this will change in the near and mid-long future. Information obtained from conversations and interviews over a longer period of time indicate that investing in Mexico is not yet an option for Dutch producers. Main reason for this is the fact that they do not have any knowledge of the Mexican market and the fact that the Mexican flower industry is not particularly export oriented.

ANNEX 2.7 CONSUMPTION CUT FLOWERS VARIOUS COUNTRIES

CONSUMPTION OF CUT FLOWERS PER CAPITA (EUROS)

COUNTRY	CONSUMPTION
Switzerland	94
Netherlands	60
Norway	58
Austria	44
Belgium	44
United Kingdom	40
Germany	38
Sweden	34
Italy	33
France	33
Ireland	31
United States	21
Spain	19
Mexico[1]	10
Poland	7
Russia	3
China[1]	0.25

Source: Flower Council Holland
Note: [1] Estimate

3. POT PLANTS

3.1 DEVELOPMENT AREA OF POT PLANTS BY STATE AND TYPE OF PLANTS; 2001 - 2006 [1] (Hectares)

STATE	YEAR					
	2001	2002	2003	2004	2005	2006
Total SIAP	**961**	**1.152**	**916**	**1.611**	**1.628**	**1.753**
San Luis Potosí	299	299	299	723	723	722
Puebla	485	485	485	487	487	497
State of Mexico	92	285	87	103	117	137
Distrito Federal	58	61	25	104	111	114
Veracruz	-	-	-	80	85	105
Michoacán	-	-	-	-	6	80
Morelos	5	-	-	75	69	68
Jalisco	-	-	-	-	30	30
Guerrero	-	-	-	-	-	-
Baja California	22	22	20	21	-	-
Sinaloa	-	-	-	-	-	-
Oaxaca	-	-	-	-	-	-
Querétaro	-	-	-	-	-	-
Durango	-	-	-	-	-	-
Nayarit	-	-	-	16	-	-
Hidalgo	-	-	-	-	-	-
Sonora	-	-	-	-	-	-
Tlaxcala	-	-	-	-	-	-
Yucatán	-	-	-	-	-	-
Guanajuato	-	-	-	-	-	-
Chihuahua	-	-	-	-	-	-
Baja California Sur	-	-	-	2	-	-
Coahuila	-	-	-	-	-	-
Aguascalientes	N.A. [2]	N.A.	N.A.	N.A.	N.A.	N.A.
Chiapas	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.
Colima	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.
Nuevo León	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.
Quintana Roo	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.
Tabasco	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.
Tamaulipas	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.
Zacatecas	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.

Source: Derived from SIAP data on the basis of annex 1.13.
Notes: [1] Similar statistics are also available for 1990-2001 but are not presented here.
[2] N.A.: for these States no statistical information is available.

POT PLANTS BY TYPE	YEAR					
	2001	2002	2003	2004	2005	2006
Total SIAP	**961**	**1.152**	**916**	**1.611**	**1.628**	**1.753**
Palm (Chamaedorea)	321	321	319	824	808	827
Euphorbia	21	17	17	106	109	199
Plectranthus (Dollar)	64	254	60	60	71	69
Fern / Nephrolepis	-	-	-	-	30	40
Begonia	4	5	5	5	6	6
Petunia (plant)	4	4	4	5	5	4
Cyclamen (plant)	4	4	4	4	4	4
Senecio (plant)	4	4	4	4	4	4
Rose (plant)	-	-	-	-	5	6
Impatiens balsamina	-	-	-	-	2	3
Other	539	543	503	603	584	591

Source: Derived from SIAP data on the basis of annex 1.13.
Notes: [1] Similar statistics are also available for 1990-2001 but are not presented here.

STATE OF MEXICO	2001	2002	2003	2004	2005	2006
TOTAL SIAP	**92**	**285**	**87**	**103**	**117**	**137**
Chamaedorea (palm)	-	-	-	-	-	-
Plectranthus (Dollar)	64	254	60	60	71	69
Euphorbia	3	4	4	11	8	15
Fern / Nephrolepis	-	-	-	-	-	10
Begonia	4	5	5	5	6	6
Petunia (plant)	4	4	4	5	5	4
Cyclamen (plant)	4	4	4	4	4	4
Senecio (plant)	4	4	4	4	4	4
Rose (plant)	-	-	-	-	5	6
Impatiens balsamina	-	-	-	-	2	3
Other	9	10	6	14	12	16

PUEBLA	2001	2002	2003	2004	2005	2006
TOTAL SIAP	**485**	**485**	**485**	**487**	**487**	**497**
Palm (Chamaedorea)	-	-	-	-	-	-
Plectranthus (Dollar)	-	-	-	-	-	-
Euphorbia	-	-	-	2	2	12
Fern / Nephrolepis	-	-	-	-	-	-
Begonia	-	-	-	-	-	-
Petunia (plant)	-	-	-	-	-	-
Cyclamen (plant)	-	-	-	-	-	-
Senecio (plant)	-	-	-	-	-	-
Rose (plant)	-	-	-	-	-	-
Impatiens balsamina	-	-	-	-	-	-
Other	485	485	485	485	485	485

MORELOS	2001	2002	2003	2004	2005	2006
TOTAL SIAP	**5**	**-**	**-**	**75**	**69**	**68**
Palm (Chamaedorea)	-	-	-	-	-	-
Plectranthus (Dollar)	-	-	-	-	-	-
Euphorbia	5	-	-	75	69	68
Fern / Nephrolepis	-	-	-	-	-	-
Begonia	-	-	-	-	-	-
Petunia (plant)	-	-	-	-	-	-
Cyclamen (plant)	-	-	-	-	-	-
Senecio (plant)	-	-	-	-	-	-
Rose (plant)	-	-	-	-	-	-
Impatiens balsamina	-	-	-	-	-	-
Other	-	-	-	-	-	-

SAN LUIS POTOSI	2001	2002	2003	2004	2005	2006
TOTAL SIAP	**299**	**299**	**299**	**723**	**723**	**722**
Palm (Chamaedorea)	299	299	299	723	723	722
Plectranthus (Dollar)	-	-	-	-	-	-
Euphorbia	-	-	-	-	-	-
Fern / Nephrolepis	-	-	-	-	-	-
Begonia	-	-	-	-	-	-
Petunia (plant)	-	-	-	-	-	-
Cyclamen (plant)	-	-	-	-	-	-
Senecio (plant)	-	-	-	-	-	-
Rose (plant)	-	-	-	-	-	-
Impatiens balsamina	-	-	-	-	-	-
Other	-	-	-	-	-	-

GUERRERO	2001	2002	2003	2004	2005	2006
TOTAL SIAP	**-**	**-**	**-**	**-**	**-**	**-**
Palm (Chamaedorea)	-	-	-	-	-	-
Plectranthus (Dollar)	-	-	-	-	-	-
Euphorbia	-	-	-	-	-	-
Fern / Nephrolepis	-	-	-	-	-	-
Begonia	-	-	-	-	-	-
Petunia (plant)	-	-	-	-	-	-
Cyclamen (plant)	-	-	-	-	-	-
Senecio (plant)	-	-	-	-	-	-
Rose (plant)	-	-	-	-	-	-
Impatiens balsamina	-	-	-	-	-	-
Other	-	-	-	-	-	-

MICHOACAN	2001	2002	2003	2004	2005	2006
TOTAL SIAP	**-**	**-**	**-**	**-**	**6**	**80**
Palm (Chamaedorea)	-	-	-	-	-	-
Plectranthus (Dollar)	-	-	-	-	-	-
Euphorbia	-	-	-	-	6	80
Fern / Nephrolepis	-	-	-	-	-	-
Begonia	-	-	-	-	-	-
Petunia (plant)	-	-	-	-	-	-
Cyclamen (plant)	-	-	-	-	-	-
Senecio (plant)	-	-	-	-	-	-
Rose (plant)	-	-	-	-	-	-
Impatiens balsamina	-	-	-	-	-	-
Other	-	-	-	-	-	-

JALISCO	2001	2002	2003	2004	2005	2006
TOTAL SIAP	**-**	**-**	**-**	**-**	**30**	**30**
Palm (Chamaedorea)	-	-	-	-	-	-
Plectranthus (Dollar)	-	-	-	-	-	-
Euphorbia	-	-	-	-	-	-
Fern / Nephrolepis	-	-	-	-	30	30
Begonia	-	-	-	-	-	-
Petunia (plant)	-	-	-	-	-	-
Cyclamen (plant)	-	-	-	-	-	-
Senecio (plant)	-	-	-	-	-	-
Rose (plant)	-	-	-	-	-	-
Impatiens balsamina	-	-	-	-	-	-
Other	-	-	-	-	-	-

BAJA CALIFORNIA	2001	2002	2003	2004	2005	2006
TOTAL SIAP	**22**	**22**	**20**	**21**	**-**	**-**
Palm (Chamaedorea)	22	22	20	21	-	-
Plectranthus (Dollar)	-	-	-	-	-	-
Euphorbia	-	-	-	-	-	-
Fern / Nephrolepis	-	-	-	-	-	-
Begonia	-	-	-	-	-	-
Petunia (plant)	-	-	-	-	-	-
Cyclamen (plant)	-	-	-	-	-	-
Senecio (plant)	-	-	-	-	-	-
Rose (plant)	-	-	-	-	-	-
Impatiens balsamina	-	-	-	-	-	-
Other	-	-	-	-	-	-

SINALOA	2001	2002	2003	2004	2005	2006
TOTAL SIAP	**-**	**-**	**-**	**-**	**-**	**-**
Palm (Chamaedorea)	-	-	-	-	-	-
Plectranthus (Dollar)	-	-	-	-	-	-
Euphorbia	-	-	-	-	-	-
Fern / Nephrolepis	-	-	-	-	-	-
Begonia	-	-	-	-	-	-
Petunia (plant)	-	-	-	-	-	-
Cyclamen (plant)	-	-	-	-	-	-
Senecio (plant)	-	-	-	-	-	-
Rose (plant)	-	-	-	-	-	-
Impatiens balsamina	-	-	-	-	-	-
Other	-	-	-	-	-	-

VERACRUZ	2001	2002	2003	2004	2005	2006
TOTAL SIAP	**-**	**-**	**-**	**80**	**85**	**105**
Palm (Chamaedorea)	-	-	-	80	85	105
Plectranthus (Dollar)	-	-	-	-	-	-
Euphorbia	-	-	-	-	-	-
Fern / Nephrolepis	-	-	-	-	-	-
Begonia	-	-	-	-	-	-
Petunia (plant)	-	-	-	-	-	-
Cyclamen (plant)	-	-	-	-	-	-
Senecio (plant)	-	-	-	-	-	-
Rose (plant)	-	-	-	-	-	-
Impatiens balsamina	-	-	-	-	-	-
Other	-	-	-	-	-	-

OAXACA	2001	2002	2003	2004	2005	2006
TOTAL SIAP	**-**	**-**	**-**	**-**	**-**	**-**
Palm (Chamaedorea)	-	-	-	-	-	-
Plectranthus (Dollar)	-	-	-	-	-	-
Euphorbia	-	-	-	-	-	-
Fern / Nephrolepis	-	-	-	-	-	-
Begonia	-	-	-	-	-	-
Petunia (plant)	-	-	-	-	-	-
Cyclamen (plant)	-	-	-	-	-	-
Senecio (plant)	-	-	-	-	-	-
Rose (plant)	-	-	-	-	-	-
Impatiens balsamina	-	-	-	-	-	-
Other	-	-	-	-	-	-

DISTRITO FEDERAL	2001	2002	2003	2004	2005	2006
TOTAL SIAP	**58**	**61**	**25**	**104**	**111**	**114**
Palm (Chamaedorea)	-	-	-	-	-	-
Plectranthus (Dollar)	-	-	-	-	-	-
Euphorbia	13	13	13	18	24	24
Fern / Nephrolepis	-	-	-	-	-	-
Begonia	-	-	-	-	-	-
Petunia (plant)	-	-	-	-	-	-
Cyclamen (plant)	-	-	-	-	-	-
Senecio (plant)	-	-	-	-	-	-
Rose (plant)	-	-	-	-	-	-
Impatiens balsamina	-	-	-	-	-	-
Other	45	48	12	86	87	90

QUERETARO	2001	2002	2003	2004	2005	2006
TOTAL SIAP	-	-	-	-	-	-
Total Plants Querétaro	-	-	-	-	-	-
Palm (Chamaedorea)	-	-	-	-	-	-
Plectranthus (Dollar)	-	-	-	-	-	-
Euphorbia	-	-	-	-	-	-
Fern / Nephrolepis	-	-	-	-	-	-
Begonia	-	-	-	-	-	-
Petunia (plant)	-	-	-	-	-	-
Cyclamen (plant)	-	-	-	-	-	-
Senecio (plant)	-	-	-	-	-	-
Rose (plant)	-	-	-	-	-	-
Impatiens balsamina	-	-	-	-	-	-
Other	-	-	-	-	-	-

DURANGO	2001	2002	2003	2004	2005	2006
TOTAL SIAP	-	-	-	-	-	-
Total Plants Durango	-	-	-	-	-	-
Palm (Chamaedorea)	-	-	-	-	-	-
Plectranthus (Dollar)	-	-	-	-	-	-
Euphorbia	-	-	-	-	-	-
Fern / Nephrolepis	-	-	-	-	-	-
Begonia	-	-	-	-	-	-
Petunia (plant)	-	-	-	-	-	-
Cyclamen (plant)	-	-	-	-	-	-
Senecio (plant)	-	-	-	-	-	-
Rose (plant)	-	-	-	-	-	-
Impatiens balsamina	-	-	-	-	-	-
Other	-	-	-	-	-	-

NAYARIT	2001	2002	2003	2004	2005	2006
TOTAL SIAP	-	-	-	**16**	-	-
Palm (Chamaedorea)	-	-	-	-	-	-
Plectranthus (Dollar)	-	-	-	-	-	-
Euphorbia	-	-	-	-	-	-
Fern / Nephrolepis	-	-	-	-	-	-
Begonia	-	-	-	-	-	-
Petunia (plant)	-	-	-	-	-	-
Cyclamen (plant)	-	-	-	-	-	-
Senecio (plant)	-	-	-	-	-	-
Rose (plant)	-	-	-	-	-	-
Impatiens balsamina	-	-	-	-	-	-
Other	-	-	-	16	-	-

HIDALGO	2001	2002	2003	2004	2005	2006
TOTAL SIAP	-	-	-	-	-	-
Palm (Chamaedorea)	-	-	-	-	-	-
Plectranthus (Dollar)	-	-	-	-	-	-
Euphorbia	-	-	-	-	-	-
Fern / Nephrolepis	-	-	-	-	-	-
Begonia	-	-	-	-	-	-
Petunia (plant)	-	-	-	-	-	-
Cyclamen (plant)	-	-	-	-	-	-
Senecio (plant)	-	-	-	-	-	-
Rose (plant)	-	-	-	-	-	-
Impatiens balsamina	-	-	-	-	-	-
Other	-	-	-	-	-	-

SONORA	2001	2002	2003	2004	2005	2006
TOTAL SIAP	-	-	-	-	-	-
Palm (Chamaedorea)	-	-	-	-	-	-
Plectranthus (Dollar)	-	-	-	-	-	-
Euphorbia	-	-	-	-	-	-
Fern / Nephrolepis	-	-	-	-	-	-
Begonia	-	-	-	-	-	-
Petunia (plant)	-	-	-	-	-	-
Cyclamen (plant)	-	-	-	-	-	-
Senecio (plant)	-	-	-	-	-	-
Rose (plant)	-	-	-	-	-	-
Impatiens balsamina	-	-	-	-	-	-
Other	-	-	-	-	-	-

TLAXCALA	2001	2002	2003	2004	2005	2006
TOTAL SIAP	-	-	-	-	-	-
Palm (Chamaedorea)	-	-	-	-	-	-
Plectranthus (Dollar)	-	-	-	-	-	-
Euphorbia	-	-	-	-	-	-
Fern / Nephrolepis	-	-	-	-	-	-
Begonia	-	-	-	-	-	-
Petunia (plant)	-	-	-	-	-	-
Cyclamen (plant)	-	-	-	-	-	-
Senecio (plant)	-	-	-	-	-	-
Rose (plant)	-	-	-	-	-	-
Impatiens balsamina	-	-	-	-	-	-
Other	-	-	-	-	-	-

YUCATAN	2001	2002	2003	2004	2005	2006
TOTAL SIAP	-	-	-	-	-	-
Palm (Chamaedorea)	-	-	-	-	-	-
Plectranthus (Dollar)	-	-	-	-	-	-
Euphorbia	-	-	-	-	-	-
Fern / Nephrolepis	-	-	-	-	-	-
Begonia	-	-	-	-	-	-
Petunia (plant)	-	-	-	-	-	-
Cyclamen (plant)	-	-	-	-	-	-
Senecio (plant)	-	-	-	-	-	-
Rose (plan t)	-	-	-	-	-	-
Impatiens balsamina	-	-	-	-	-	-
Other	-	-	-	-	-	-

CHIHUAHUA	2001	2002	2003	2004	2005	2006
TOTAL SIAP	-	-	-	-	-	-
Palm (Chamaedorea)	-	-	-	-	-	-
Plectranthus (Dollar)	-	-	-	-	-	-
Eupho rbia	-	-	-	-	-	-
Fern / Nephrolepis	-	-	-	-	-	-
Begonia	-	-	-	-	-	-
Petunia (plant)	-	-	-	-	-	-
Cyclamen (plant)	-	-	-	-	-	-
Senecio (plant)	-	-	-	-	-	-
Rose (plant)	-	-	-	-	-	-
Impatiens balsamina	-	-	-	-	-	-
Other	-	-	-	-	-	-

GUANAJUATO	2001	2002	2003	2004	2005	2006
TOTAL SIAP	-	-	-	-	-	-
Palm (Chamaedorea)	-	-	-	-	-	-
Plectranthus (Dollar)	-	-	-	-	-	-
Euphorbia	-	-	-	-	-	-
Fern / Nephrolepis	-	-	-	-	-	-
Begonia	-	-	-	-	-	-
Petunia (plant)	-	-	-	-	-	-
Cyclamen (plant)	-	-	-	-	-	-
Senecio (plant)	-	-	-	-	-	-
Rose (plant)	-	-	-	-	-	-
Impatiens balsamina	-	-	-	-	-	-
Other	-	-	-	-	-	-

COAHUILA	2001	2002	2003	2004	2005	2006
TOTAL SIAP	-	-	-	-	-	-
Palm (Chamaedorea)	-	-	-	-	-	-
Plectranthus (Dollar)	-	-	-	-	-	-
Euphorbia	-	-	-	-	-	-
Fern / Nephrolepis	-	-	-	-	-	-
Begonia	-	-	-	-	-	-
Petunia (plant)	-	-	-	-	-	-
Cyclamen (plant)	-	-	-	-	-	-
Senecio (plant)	-	-	-	-	-	-
Rose (plant)	-	-	-	-	-	-
Impatiens balsamina	-	-	-	-	-	-
Other	-	-	-	-	-	-

BAJA CALIFORNIA SUR	2001	2002	2003	2004	2005	2006
TOTAL SIAP	-	-	-	**2**	-	-
Palm (Chamaedorea)	-	-	-	-	-	-
Plectranthus (Dollar)	-	-	-	-	-	-
Euphorbia	-	-	-	-	-	-
Fern / Nephrolepis	-	-	-	-	-	-
Begonia	-	-	-	-	-	-
Petunia (plant)	-	-	-	-	-	-
Cyclamen (plant)	-	-	-	-	-	-
Senecio (plant)	-	-	-	-	-	-
Rose (plant)	-	-	-	-	-	-
Impatiens balsamina	-	-	-	-	-	-
Other	-	-	-	2	-	-

ANNEX 3.2 SWOT ANALYSIS

Strong points

- Good internal (physiological) plant quality
- Co-operation in marketing between producers
- Good climatic conditions (Morelos, Puebla)
- Close to big consumer market
- Low labor cost
- No foreign competitors

Weak points

- Relatively small companies
- No specialization, extended assortment but small quantities
- Insufficient attention to visual quality
- Insufficient knowledge of logistics, marketing amongst producers
- Little attention to promotion
- Old-fashioned distribution structure (CONAPLOR excepted)
- Old-fashioned assortment
- Export to US very difficult, due to plant health regulations
- Financing very difficult, due to high interest rates

Opportunities

- Expanding consumer market
- Co-operation in production and marketing
- Upcoming sales by retail organizations
- Potential strong domestic market

Threats

- Negligence in quality policy
- Insufficient measures to improve environmental situation in production areas
- Increasing land prices in parts of the central highlands of Mexico
- Increasing labor cost

ANNEX 3.3 MAIN PRODUCERS OF POT PLANTS, FOLIAGE AND TREES (MEXICO)

Office of the Agricultural Counsellor – Netherlands Embassy in Mexico

Version: 17-12-2007

- STATE OF BAJA CALIFORNIA

Name of company:	**Rancho Flora Cáctus**
Contact and position:	Manuel Marchena Delgado – Owner
Address:	Lago Chaira 477, Colonia Valle Dorado, CP 22890, Ensenada, Baja California
Tel.	+ 52-646 154 09 82
Fax:	+ 52-646 154 09 67
E-mail:	scactus@telnor.net
Website:	N.A.(2)
Product:	Pot plants, larkspur, perritos, deshidrata, lilies, gerbera
Activities (size – tech):	Production and exports (4.5 has – greenhouses)

- STATE OF CHIAPAS

Name of company:	**Finca Argovia Div. Flores, Río Cuilco**
Contact and position:	Jorge Giesemann - Manager
Address:	37 Pte, No.5, Colonia 5 de febrero, CP 30700, Tapachula, Chiapas
Tel.	+52-962 626 50 55 and +52-962 626 91 82
Fax:	+52-962 626 31 99
E-mail:	riocuilco@cuilcovalley.com.mx
Website:	www.cuilcovalley.com.mx
Product:	Tropical foliage, tropical flowers, ginger, heliconas, anthuriums
Activities (size – tech):	Production and exports (20 has. - greenhouses, mesh shadow, open field)

Name of company:	**Chiapas Flower**
Contact and position:	Rainier Boehme Winkler - Manager
Address:	9ª Avenida Norte 135-A, Colonia Jardines del Tacaná, CP 30720, Tapachula, Chiapas
Tel.	+ 52-962 626 42 88 and +52-962 625 63 34
Fax:	+ 52-962 625 63 34
E-mail:	chiapasflower@prodigy.net.mx and chflow@prodigy.net.mx
Website:	www.chiapasflower.com.mx
Product:	Anthurium, pink ginger, red ginger, heliconia, cymbidium, bird of paradise.
Activities (size – tech):	Production and exports (5 has. – greenhouses, mesh shadow, open field)

- STATE OF COLIMA

Name of company:	**Follajes Tropicales de Colima**
Contact and position:	Carlos Alvarez Iglesias - Represantitive
Address:	Km. 4 Carretera a Manzanillo, CP 28010, Colima, Colima
Tel:	+ 52-312 314 48 78
Fax:	+ 52-312 314 48 78
E-mail:	carlos_a@viverosdecolima.com and claudia_pantoja@viverosdecolima.com and hectoralvarez@viverosdecolima.com
Website:	N.A.(2)
Product:	Potplants, foliage, ficus
Activities (size – tech):	Production (40 has. - mesh shadow, open air)

Name of company:	**Agroindustrias Montecristo**
Contact and position:	Ignacio Vaquero Diaz - Owner
Address:	José Santos Chocano No. 234, Colonia Jardines de Vista Hermosa, CP 28017, Colima, Colima
Tel.	+ 52-312 13 21 21
Fax:	+ 52-313 13 56 56
E-mail:	pammontecristo@produgy.net.mx
Website:	N.A.(2)
Product:	Pot plants, ficus, bromelia, helechos, ananaes comosus
Activities (size – tech):	Production (20 has. – open field, mesh shadow)

Name of company:	**Rancho La Columnaria**
Contact and position:	Manuel Enrique Arias Camarena - Represantitive
Address:	Calle Independencia No. 61, Armería, Colima
Tel:	+ 52-313 322 12 97
Fax:	+ 52-312 330 99 44
E-mail:	columnario@prodigy.net.mx
Website:	N.A.(2)
Product:	Various trees
Activities (size – tech):	Production (12 has. - mesh shadow, open field)

Name of company:	**Viveros de Colima**
Contact and position:	Patrick Patón - Represantitive
Address:	Juan Alvarez No. 1010, Lomas Vista, Hermosa Colima, CP 28016 Colima
Tel:	+ 52-312 314 48 78 and +52-312 314 78 35
Fax:	N.A.(2)
E-mail:	ventas@viverosdecolima.com.mx
Website:	www.viverosdecolima.com.mx
Product:	Pot plants and various cut flowers
Activities (size – tech):	Production and commercialization (5 has. - mesh shadow, open field)

Name of company:	**Plantas y Jardines de Colima**
Contact and position:	Juan Oseguera Parra
Address:	Manuel Acuña No. 44, Colonia Lomas de Circunvalación, CP 28010, Colima, Colima
Tel.	+ 52-312 312 58 68
Fax:	+ 52-312 330 99 44
E-mail:	coepplants@yahoo.com.mx
Website:	N.A.(2)
Product:	Pot plants, ficus, bromelia, helechos, ananaes comosus
Activities (size – tech):	Production (5 has. – open air)

- STATE OF DISTRITO FEDERAL

Name of company:	**Agrosnavidad**
Contact and position:	Luciano Zarate Duarte - Manager
Address:	Estado de México: Rancho tres Encinos, Ramal a Valle de Bravo Km 12.5. México City: Rio Neva No. 17, Col. Cuauhtemoc, Distrito Federal
Tel.	+ 52-55 55 66 70 26
Fax:	+ 52-55 55 66 71 25
E-mail:	zaratedl@prodigy.net.mx
Website:	www.agrosnavidad.com
Product:	Various trees, douglas fir pseudotsuga macrolepis, pinos pinea, pinos ayacahuite
Activities (size – tech):	Production (250 has. – mesh shadow and open air)

- STATE OF GUANAJUATO

Name of company:	**Viveros GDV**
Contact and position:	Gutiérrez de Velasco Manuel – Owner
Address:	J. Clouthier No. 407, Jardines del Campestre, León, CP 37170, Guanajuato
Tel.	+ 52-477 772 63 80 and +52-477 772 62 28
Fax:	+ 52-477 772 61 71
E-mail:	info@viverosgdv.com and ventas@viverosgdv.com
Website:	www.viverosgdv.com
Product:	Pot plants and ornamental trees
Activities (size – tech):	Production (8 – 10 has – greenhouses)

- STATE OF JALISCO

Name of company:	**Vivero Rancho Calderón**
Contact and position:	Heriberto Calderón Amador - Owner
Address:	Camino Puerta de Piedra S/N, Colonia la Salada, CP 45600, Tlajomulco, Jalisco
Tel.	+ 52-333 686 22 87 and + 52-333 686 21 59 and +52-333 693 47 47
Fax:	+ 52-333 686 39 48
E-mail:	vivcald@prodigy.net.mx and eduardocalderon@viveroranchocalderon.com
Website:	www.viveroranchocalderon.com.mx
Product:	Pot plants, nochebuena, lily, foliage and trees
Activities (size – tech):	Production (21 has. – greenhouses, mesh shadow and open air)

Name of company:	**Finlam**
Contact and position:	Ramón L. Sotil Achutegui - Director
Address:	Domicilio Conocido; Rancho el Jaral, CP 49200, Atoyac, Jalisco
Tel.	+ 52-372 410 20 28 and +52-372 410 50 38
Fax:	+ 52-372 410 20 18
E-mail:	finlam@prodigy.net.mx and ramonsa@avantel.net
Website:	www.finlam.com.mx
Product:	Leather leaf fern
Activities (size – tech):	Production and exports (25 has. – mesh shadow)

Name of company:	**Vivero Sedano**
Contact and position:	Alejandra Sedano Banninger - Represantative
Address:	Carretera Ajijic – San Juan Cosalá 1009-A, Guadalajara, Jalisco
Tel.	+ 52-333 135 12 20
Fax:	+ 52-333 135 12 20
E-mail:	info@viverosedano.com
Website:	www.viverosedano.com.mx
Product:	Belen, cactus, african violet, helecho, etc
Activities (size – tech):	Production (N.A.[(2)]– N.A.[(2)])

- STATE OF MEXICO

Name of company:	**Flores de Chiltepec**
Contact and position:	Ing. Rogelio Olascoaga - Owner
Address:	Antiguo Camino a Chiltepec-Coatepec Harinas s/n, CP 51750, Estado de México
Tel.	+ 52-723 147 40 91 and +52-723 147 40 92 and +52-723 147 40 93
Fax:	+ 52-723 147 40 95
E-mail:	jparra@chiltepec.com and rolascoaga@chiltepec.com and comercializadorachiltepec@prodigy.net.mx
Website:	www.chiltepec.com
Products:	Pot plants and cut flowers: Roses and spray roses, phaleanopsis orchids, oriental and Asiatic lilies, tulips, mini gerbera, iris, etc
Activities (size – tech):	Production and exports (20 has. – greenhouses and 5 has. – greenhouses in Veracruz)

Name of company:	**Plantas y Flores Cárdenas Jerónimo**
Contact and position:	Armando Cárdenas - Owner
Address:	Domicilio conocido s/n, San Lorenzo, Tlacotepec, CP 50450, Atlacomulco, México
Tel.	+ 52-712 122 36 76
Fax:	+ 52-712 122 69 44
E-mail:	plantflorcaje@yahoo.com.mx
Website:	N.A.[(2)]
Product:	Cyclamen, malvón, carnation, rosal, lily, etc.
Activities (size – tech):	Production (N.A.[(2)]– N.A.[(2)])

- STATE OF MICHOACAN

Name of company:	**Rancho Colibri**
Contact and position:	Jaime Zamora Pérez - Owner
Address:	Atenas No. 19 Frac. La Joyita, CP 60170, Uruapan, Michoacán
Tel:	+ 52-452 523 57 44
Fax:	+ 52-452 523 97 00
E-mail:	rcolibri@intermatsa.com.mx
Website:	www.ranchocolibri.com
Product:	Birds of paradise, aster, limonium
Activities (size – tech):	Production (20 has. – tunnels, open field)

Name of company:	**Flores Carachita**
Contact and position:	José Hernández Salazar - Manager
Address:	20 de Noviembre No. 6 Centro, CP 60000, Uruapan, Michoacán
Tel:	+ 52-452 524 58 60
Fax:	+ 52-452 523 12 74
E-mail:	carachita@prodigy.net.mx
Website:	www.florescarachita.com
Product:	Tropical flowers, anthuriums, heliconia, zanthedeschia/white arum lily, birds of paradise
Activities (size – tech):	Production and exports (4 has. – greenhouses)

Name of company:	**Grupo Elvira**
Contact and position:	Rafael Elvira Amezcua – Production manager
Address:	Acapulco No. 21-A, Colonia Morelos, CP 60050, Uruapan, Michoacán
Tel.	+ 52-452 524 02 91 and +52-443 319 85 53
Fax:	+ 52-452 524 02 91
E-mail:	grupoelvira@grupoelvira.com
Website:	www.grupoelvira.com
Product:	Ornamentals, birds of paradise, alcatraces, anturios
Activities (size – tech):	Production (N.A.[(2)]- N.A.[(2)])

- STATE OF MORELOS

Name of company:	**Floraplant**
Contact and position:	Fidel Ochoa - Owner Mauricio Paniagua – Production manager
Address:	In Morelos: Av. Benito Juárez S/N, CP 62767 Tetecalita, Morelos In México: Lirio Acuático 124 Xaltocan, Xochimilco 16090 México, D.F. In Atlacomulco: Atlacomulco, San Lorenzo Tlacotepec, El Puente Estado de México
Tel:	Morelos: +52 777 362 01 40; Xochimilco: +52 55 56 41 62 21 State of Mexico: +52 712 124 82 48
E-mail:	ventas@floraplant.com
Website:	www.floraplant.com
Product:	Ornamentals, geranium, petunia, anthurium, bromelia noche buena, etc.
Activities (size – tech):	Production and exports (25 has. – greenhouses)

Name of company:	**Vivero Yautepec**
Contact and position:	Frank Magdahl - Owner
Address:	Km.30 Carretera Federal Cuernavaca – Cuautla, San Pedro, CP 62730, Yautepec, Morelos
Tel.	+ 52-735 394 03 57 and + 52-735 394 29 77
Fax:	+ 52-735 394 03 57
E-mail:	caramyau@prodigy.net.mx
Website:	www.vivero-yautepec.com
Product:	Ornamentals, fruit trees, trees, palms and Mexican plants.
Activities (size – tech):	Production (10 has. – open field)

Name of company:	**Vivero Plantec**
Contact and position:	Alejandro Cano - Owner
Address:	Km. 1.5, Carretera Puente de Ixtla - Amacuzac, CP 64640, Cuarnavaca, Morelos
Tel.	+ 52-751 348 0220
Fax:	+ 52-751 348 0220
E-mail:	N.A.(2)
Website:	N.A.(2)
Product:	Spathiphylium, helechos and beaucarnea
Activities (size – tech):	Production (8 has. – greenhouses and open field)

Name of company:	**Proplant**
Contact and position:	Aguirre Albarrán Fernando - Owner
Address:	Av. Ferrocarril 66, Col Cuautlixco, CP 62749, Cuautla, Morelos
Tel.	+ 52-735 353 45 93
Fax:	+ 52-735 353 33 62
E-mail:	N.A.(2)
Website:	N.A.(2)
Product:	Potplants, anturio, ficus starlight
Activities (size – tech):	Production (10 has. – greenhouses)

Name of company:	**Viveros Anaya**
Contact and position:	Alberto Anaya Casares – Owner Julio Enrique Anaya - N.A.(2)
Address:	Carretera Atlachobaya Km.1, Xochitepec, Morelos
Tel.	+ 52-777 36 13 099
Fax:	+ 52-777 36 13 099
E-mail:	alberto@viveros-anaya.com.mx
Website:	N.A.(2)
Product:	Pot plants, begonium, helechos, nochebuena
Activities (size – tech):	Production (N.A.(2)– greenhouses and open field)

Name of company:	**Bioplants Viveros**
Contact and position:	Jorge Alcantara - Socio
Address:	Privada La Mina S/N, Colonia El Castillo, CP 62550, Morelos
Tel.	+ 52-777 319 46 54
Fax:	+ 52-777 320 61 51
E-mail:	bioplants@infosel.net.mx
Website:	N.A.(2)
Product:	Potplants, chrysanthemum, kalanchoe, bromeliad, amaryllis
Activities (size – tech):	Production (1 has. – greenhouses)

Name of company:	**Viveros de Tetela**
Contact and position:	Jorge Luis Conseco – Owner Paula hernandez Flores - N.A.(2)
Address:	Calle Popotla, No. 5, tetela del Norte, CP 62130, Cuarnavaca, Morelos
Tel.	+ 52-777 311 63 81 and +52-777 311 63 83
Fax:	N.A.(2)
E-mail:	viverosdetetela@hotmail.com
Website:	N.A.(2)
Product:	Potplants, nochebuena, azalea, belem, chrysanthemum
Activities (size – tech):	Production (N.A.(2)– N.A.(2))

Name of company:	**Plantaflor**
Contact and position:	Luis Granada Carreto - Owner
Address:	Av. 10 de Abril # 56 Las Granjas, CP 62460, Cuernavaca, Morelos
Tel.	+52-777 3 16 54 42
Fax:	+52-777 3 16 54 42
E-mail:	lgranadac@plantaflor.com.mx
Website:	N.A.(2)
Product:	Ornamentals (gerbera, chrysanthemum, geraniums, chalathea, anthuriums, bromeliads)
Activities (size – tech):	Production (N.A.(2)- N.A.(2))

Name of company:	**Vivero Flor y Miel**
Contact and position:	Aguerrevere Devereux Fernando - Owner
Address:	Av. Emiliano Zapata No. 214, Tlaltenango, CP 62170, Cuernavaca, Morelos
Tel.	+52-777 311 24 42
Fax:	+52-777 311 31 49
E-mail:	flormiel@terra.com.mx
Website:	N.A.(2)
Product:	Anthurium, geraniums, noche buena, belen, zempoalxochitl, kalanchoe
Activities (size – tech):	Production (1.5 has - greenhouses)

Name of company:	**Tahí Flores Exoticas**
Contact and position:	Marilu Pobveresky – Owner Elizabeth Juárez - Manager
Address:	Campo Chamilpa No. 17, Colonia Diego Ruiz, Yautepec, Morelos
Tel.	+52-735 39 40 867
Fax:	+52-735 39 40 877
E-mail:	tahi@prodigy.net and tahi@orquidea.com.mx
Website:	N.A.(2)
Product:	Orchids
Activities (size – tech):	Production (1 has. - greenhouses)

Name of company:	**Tecnoflor**
Contact and position:	Alfredo Pellon Barraza - Owner
Address:	Av. Las Fuentes No. 3, Jiutepec, Morelos
Tel.	+52-777 319 29 29
Fax:	+52-777 320 76 63
E-mail:	tecnoflor@todito.com
Website:	N.A.(2)
Product:	Gerbera, noche buena, cactus, etc.
Activities (size – tech):	Production (1 has – mesh shadow)

Name of company:	**Viveros San Francisco**
Contact and position:	Gerardo Hernandez - Owner
Address:	Av. Ferrocarril No. 141, Colonia cuautlixco, Cuautla, Morelos
Tel.	+ 52-735 353 06 27
Fax:	+ 52-735 316 57 23
E-mail:	gerard40@prodigy.net.mx
Website:	N.A.(2)
Product:	Belen, ficus star light, birds of paradise, violeta africana, etc.
Activities (size – tech):	Production (1.5 has. - greenhouses)

Name of company:	**Jardin Jonacatepec**
Contact and position:	Luis Felipe del Valle Prieto - Owner
Address:	Villagran No. 84, Colonia Leandro Valle, CP 62930, Jonacatepec, Morelos
Tel.	+ 52-735 355 04 03
Fax:	+ 52-735 355 04 04
E-mail:	jardinjona@prodigy.net.mx
Website:	N.A.(2)
Product:	Orquids, tulips, etc.
Activities (size – tech):	Production (1.5 has. - greenhouses)

Name of company:	**Vivero Mundo**
Contact and position:	Patricia Villar Amarillas - Owner
Address:	Avenida del Trabajo No. 96, Col. Dr. José D. Parres, CP 62520, Jiutepec, Morelos
Tel.	+ 52-777 320 63 49 01 and +52-777 321 25 29
Fax:	N.A.(2)
E-mail:	patriciamarillasvillar@hotmail.com
Website:	N.A.(2)
Product:	Pot plants, nochebuena and foliage
Activities (size – tech):	Production (1.5 has. - greenhouses)

- STATE OF PUEBLA

Name of company:	**Viveros Atlixco**
Contact and position:	Jorge Cruz - Manager
Address:	Héroes del 4 de Mayo No.3, Colonia Cabrera, CP 74360, Atlixco, Puebla
Tel.	+ 52-244 445 61 45
Fax:	+ 52-244 445 61 49
E-mail:	atlixcovivero1s@yahoo.com.mx and artlixcoviveros2@yahoo.com.mx and bulbosatlixcoviveros@yahoo.com.mx
Website:	www.atlixcoviveros.com.mx
Product:	Heliconia, white arum lily, gladioli, tulips, tuberoses, fillers: aster, statice, solidago
Activities (size – tech):	Production and exports (35 has. – greenhouses, open field)

Name of company:	**Flornatec**
Contact and position:	Vicente Nieto - Owner
Address:	Carr. San Juan Tianguismanalco s/n en "Los Pinos", CP 74360, Cabrera Atlixco, Puebla
Tel.	+ 52-244 785 10 42 and + 52-244 761 52 53
Fax:	+ 52-244 446 04 27
E-mail:	flornatec@yahoo.com.mx
Website:	N.A.(2)
Product:	Ornamentals, noche buena, crisantemo, cyclamen, gerbera, etc.
Activities (size – tech):	Production (2 has. - greenhouses)

Name of company:	**Vivero Los Laureles**
Contact and position:	N.A.(2)
Address:	Carr. Puebla-Izúcar de Matamoros Km. 31.5 Libramiento Atlixco s/n, La Moraleda, CP, 74200 Atlixco, Puebla
Tel.	+ 52-244 447 84 05 and + 50-244 442 93 07
Fax:	N.A.(2)
E-mail:	N.A.(2)
Website:	N.A.(2)
Product:	Ornamentals (poinsettia, geranium, calla, anthurium, bonsai, fruit trees and gardening products)
Activities:	Production, purchase and sale (N.A.(2)- N.A.(2))

Name of company:	**Ornamentales Asun**
Contact and position:	N.A.(2)
Address:	25 Norte No. 1, esq. Av. Manuel Gómez Morín, Los Solares Chicos, CP 74360, Cabrera Atlixco, Puebla
Tel:	+ 52-244 102 38 13 and +52-244 442 40 82
Fax:	N.A.(2)
E-mail:	asun@yahoo.com.mx
Website:	N.A.(2)
Product:	Pot plants, geranium, belén, nochebuena
Activities (size – tech):	Production (N.A.(2)- N.A.(2))

Name of company:	**Rancho La Joya**
Contact and position:	Gustavo Escobar – Gerente de producción
Address:	Domicilio Conocido Col. Juan Uvera, Colonia Juan Uvera, CP 74200, Puebla
Tel.	+ 52-244 445 32 99 and +52-244 445 44 88
Fax:	+ 52-244 445 34 91
E-mail:	N.A.(2)
Website:	N.A.(2)
Product:	Gladiola, limonium, orquids, etc.
Activities (size – tech):	Production and exports (N.A.(2) – greenhouses)

- STATE OF SAN LUIS POTOSI

Name of company:	**Protoplanta**
Contact and position:	Hugo Martínez Aguilar – Owner Matías Martínez – Gerente de producción
Address:	Km 3. Antigua carretera Club Campestre, Soledad de Graciano Sánches, CP 78430, San Luis Potosi
Tel:	+ 52-444 831 22 02 and +52-444 831 07 68 and +52-444 831 16 03
Fax:	+ 52-444 100 73 13
E-mail:	hugom@protoplanta.com and matiasm@protoplanta.com
Website:	www.protoplanta.com
Product:	Pot plants, begonium, kalanchoe, lily, nochebuena
Activities (size – tech):	Production (4 has. - greenhouses)

- STATE OF SINALOA

Name of company:	**Green Pacific**
Contact and position:	Gilberto Pérez Audelo – General Director
Address:	Carretera a Novolato Km. 9.5 Frente al asilo, CP 80375, Culiacan, Sinaloa
Tel.	+ 52-667 660 09 22
Fax:	+ 52-667 617 89 79
E-mail:	N.A.(2)
Website:	N.A.(2)
Product:	Calancho, geranio, petunia, helechos
Activities (size – tech):	Production (1.5 has. – mesh shadow)

- STATE OF SONORA

Name of company:	**Jardines y Diseños del Noroeste**
Contact and position:	Germán Pablos Tirado - Owner
Address:	Canal Porfirio Díaz Km. 4 + 911, Cócorit, CP 85213, Sonora
Tel.	+ 52-644 418 08 72
Fax:	+ 52-644 418 09 92
E-mail:	apablos@jardinosa.com.mx
Website:	www.jardinosa.com.mx
Product:	Potplants
Activities (size – tech):	Production (N.A. – N.A.)

- STATE OF TABASCO

Name of company:	**Tropical Corporation**
Contact and position:	Aníbal Pedrero - Manager
Address:	Paseo de la Sierra No. 229, CP 86040, Villahermosa, Tabasco
Tel.	+ 52-993 315 28 53 and + 52-993 315 28 55
Fax:	+ 52-993 315 28 53
E-mail:	anibalpedrero@apbyasociados.com
Website:	N.A.(2)
Product:	Chamaedor elegance & obligata, tropical flowers
Activities (size – tech):	Production and exports (40 has. – open field)

Name of company:	**Tropiflor Tabasco**
Contact and position:	Blanca Whizar - Manager
Address:	Paseo Tabasco No. 1112, Colonia García, CP 86040, Villahermosa, Tabasco
Tel.	+ 52-993 315 14 09
Fax:	+ 52-993 315 27 79
E-mail:	bwhizar@hotmail.com and aleyris@yahoo.com.mx and tropiflor_tabasco@yahoo.com.mx
Webite:	N.A.(2)
Product:	Tropical flowers, foliage: heliconia, ginger, tropical foliage
Activities (size – tech):	Production and exports (30 – 50 has. – open field)

- STATE OF VERACRUZ

Name of company:	**La Flor de Catemaco**
Contact and position:	José de la Luz Ponce Puente - Represantative
Address:	Carretera de Catemaco – Coyame Km. 9.5, Apartado Postal 49, Catemaco, Veracruz.
Tel.	+ 52-294 943 51 28
Fax:	+ 52-294 943 51 28
E-mail:	informes@laflordecatemacp.com
Website:	www.laflordecatemaco.com
Product:	Folliage, palms, helecho cuero, espárragos, piñas ornamentales.
Activities (size – tech):	Production and exports (160 has. – mesh shadow and open air)

Name of company:	**Gartal**
Contact and position:	Yenia García Talavera - Owner
Address:	Avenida 1 Calle 1, CP 94920, Cuichapa, Veracruz.
Tel.	+ 52-278 745 05 94
Fax:	+ 52-278 745 05 94
E-mail:	surestetrade@prodigy.net.mx and yeniagt@hotmail.com
Website:	www.gartal.com.mx
Product:	Palms, elegans, tepejilote dracenas
Activities (size – tech):	Production (25 – 30 has. – greenhouses, mesh shadow)

Name of company:	**Vivero La Trinidad**
Contact and position:	Joaquin Moran - Owner
Address:	Calle Cedros Lote Manzana 5 Fraccion El Bosque, CP 94470, Fortín de las Flores, Veracruz.
Tel.	+ 52-271 713 05 81
Fax:	+ 52-271 713 05 90
E-mail:	N.A.(2)
Website:	N.A.(2)
Product:	Pot plants, anthurium, trees
Activities (size – tech):	Production (N.A.(2)– greenhouses, mesh shadow)

Name of company:	**SipeFlor**
Contact and position:	Stephan Georg Hauch Deutsch - Owner
Address (office):	Km.7 Carretera a Coyame, Catemaco, Veracruz
Tel:	+ 52-294 943 21 91 and +52-294 107 27 59
Fax:	N.A.(2)
E-mail:	sipeflor@yahoo.com.mx and sipeflorventas@yahoo.com
Website:	www.sipeflor.com
Product:	Piñas decorativas (ananas)
Activities (size – tech)	Production and exports (9 has. – mesh shadow)

Sources:

- Mexican Flower Council (Consejo Mexicano de la Flor)
- Contacts of the Office of the Agricultural Counsellor
- Association of ornamental plant growers in Morelos (POMAC)
- Guía Verde México (ornamental sector directory)

Notes:

(1) For telephone or fax communication, dial +52 followed by the city and phone/fax number when calling from outside Mexico. Dial +01 followed by the city and phone/fax number from calling from within Mexico. If you are in the same city, omit +52 and +01.

(2) N.A. - Not Available

(3) E-mail: cmf@conmexflor.org belongs to the Mexican Flower Council. Some companies do not have their own e-mail, and the CMF can contact them.

(4) size - tech: size measured in hectares, tech: technology level, ranging from highest to lowest: greenhouses, tunnel, mesh shadow and open field

4. BREEDERS' RIGHTS

ANNEX 4.1 APPLICATIONS FOR BREEDER'S RIGHTS BY DUTCH COMPANIES OF ORNAMENTAL VARIETIES (1996-2007)

No.	BREEDER	TYPE	No.	NAME	STATUS
1	DE RUITER'S NIEUWE ROZEN B.V.	ROSA	1	RUIMATS	TO 0110
			2	RUIBIYEL	TO 0111
			3	RUIABRI	TO 0112
			4	RUIROSORA	TO 0113
			5	RUIWITUN	TO 0114
			6	RUIBLEU	TO 0115
			7	RUICREVI	TO 0116
			8	RUITENOR	TO 0117
			9	RUILAV	TO 0119
			10	RUICONTI	TO 0120
			11	RUIROUG	TO 0122
			12	RUIORAN	TO 0123
			13	RUIKALLA	NEGATIVO
			14	RUIKOOWI	NEGATIVO
			15	RUISTEENKA	NEGATIVO
2	FLORIST DE KWAKEL, B. V.	GERBERA	1	SUPERNOVA	TITULO APROBADO
			2	PURPLE PRINCE	TITULO APROBADO
			3	FIORELLA	TITULO APROBADO
			4	DUNE	TITULO APROBADO
			5	ADVANCE	TITULO APROBADO
			6	AVANT GARDE	TITULO APROBADO
			7	AMULET	TITULO APROBADO
			8	ZINGARO	TITULO APROBADO
			9	QUOTE	EN ESPERA DE DICTAMEN
			10	ADVANCE	CADUCIDAD DE TRAMITE
			11	DUNE	CADUCIDAD DE TRAMITE
			12	ZINGARO	CADUCIDAD DE TRAMITE
			13	PURPLE PRINCE	CADUCIDAD DE TRAMITE
			14	SAZOU	CADUCIDAD DE TRAMITE
			15	FIORELLA	CADUCIDAD DE TRAMITE
			16	YUCATAN	CADUCIDAD DE TRAMITE
			17	SUPERNOVA	CADUCIDAD DE TRAMITE
			18	AVANT GARDE	CADUCIDAD DE TRAMITE
			19	FICTION	CADUCIDAD DE TRAMITE
			20	AMULET	CADUCIDAD DE TRAMITE
3	HILVERDA, B.V.	CLAVEL	1	HILDUCAT	TITULO APROBADO
4	INTERPLANT, B. V.	ROSA	1	INTERULIM	EN ESPERA DE DICTAMEN
5	LEX VOOR ROZENVEREDELING BV.	ROSA	1	LEXMEI	TO 0305
			2	LEXANI	TO 0306
			3	LEXAELAT	TITULO APROBADO
			4	LEXOIREK	TITULO APROBADO
6	LICENSE INSTITUTE NETHERLANDS	CALA (Alcatraz)	1	RED DESIRE	CADUCIDAD DE TRAMITE
7	PANORAMA ROSES N.V.	ROSA	1	PANSOMRO	TO 0118
			2	PANNARAN	TO 0121
8	PIET SCHREURS HOLDING, B. V.	GERBERA	1	AVE MARIA	TITULO APROBADO
			2	CRUISER	TITULO APROBADO
			3	POPOV	TITULO APROBADO
			4	HEATWAVE	TITULO APROBADO
		ROSA	1	SCHRECLA	TO 289
			2	SCHOLTEC	TO 0260

No.	BREEDER	TYPE	No.	NAME	STATUS
			3	SCHRENAT	TO 0261
			4	SCHIRUS	TO 0262
			5	SCHOWINTI	EN ESPERA DE DICTAMEN
			6	SCHUBLOVE	EN ESPERA DE DICTAMEN
			7	SCHIALLO	EN ESP ERA DE DICTAMEN
			8	SCHOCERRY	EN ESPERA DE DICTAMEN
			9	SCHELEFEM	EN ESPERA DE DICTAMEN
9	RIJN PLANT, B.V.	BUGAMBILIA	1	VERA PINK	TITULO APROBADO
			2	VERA DEEP PURPLE	TITULO APROBADO
10	SIBERIA ORIENTAL B.V.	AZUCENA HIBRIDA	1	SIBERIA	TO 0003
11	TERRA NIGRA HOLDING, B. V.	ROSA	1	SELDREAM	CONSTANCIA APROBADA
			2	SELIRON	CONSTANCIA APROBADA
12	V.O.F. OLIJ ROZEN	ROSA	1	OLIJCREM	DESISTIMIENTO
			2	OLIJFAON	DESISTIMIENTO
			3	OLIJDUM	DESISTIMIENTO
			4	OLIJNOL	DESISTIMIENTO
			5	OLIJKROET	DESISTIMIENTO
			6	OLIJSAB	DESISTIMIENTO
			7	OLIJPLAM	DESISTIMIENTO
			8	OLIJBRAU	DESISTIMIENTO
			9	OLIJGLU	DESISTIMIENTO
13	VAN ZANTEN PLANTS B.V.	ALSTROEMERIA	1	STAQUEEN	TO 0241
			2	ZALSASENAN	TO 323
			3	ZALSAREST	TO 324
			4	ZALSANEM	TO 0322
			5	ZALSALAN	EN ESPERA DE DICTAMEN
			6	ZALSACHIC	EN ESPERA DE DICTAMEN
			7	ZALSAMON	EN ESPERA DE DICTAMEN
			8	ZALSADEN	EN ESPERA DE DICTAMEN
			9	ZALSAVUE	EN ESPERA DE DICTAMEN
			10	STALOREN	TO 0124
			11	STALAULI	TO 0125
			12	STABECOR	TO 0126
			13	STAPRILAN	TO 0127
			14	STAPRILENE	TO 0128
			15	STAPRIVINA	TO 0129

Source: SAGARPA/SNICS

Notes: TO = registered breeders rights
: NEGATIVO = denied
: TITULO APROBADO = approved
: CADUCIDAD DE TRAMITE = procedure unvalid
: EN ESPERA DE DICTAMEN =pending approval
: DESISTIMIENTO = procedure withdrawn