



USDA Foreign Agricultural Service

# GAIN Report

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## Mexico

### Planting Seeds

## Annual Report

2007

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**Report Highlights:**

Although saved seeds continue to dominate the Mexican seed market, the quality and use of imported seeds is rising. The value of imported seeds from all origins increased from \$372.6 million in MY 2005/06 to \$378.2 million in MY 2006/07, and Post forecasts a slight increase in imports in 2007/08. Imported seeds are most common in vertically integrated sectors and in the production of commodities destined for export from Mexico.

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Includes PSD Changes: No  
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Annual Report  
Mexico [MX1]  
[MX]

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## Executive Summary

A large percentage of Mexican farmers continue to use saved seeds for the following years' planting seasons, accounting for an important volume of planting seeds in Mexico. However, the quality and use of imported seeds are improving. The value of imported planting seeds increased from US\$372.6 million in MY 2005/06 to US\$378.2 million in MY 2006/07. The use of high quality imported planting seeds is most common in vertically integrated production, such as in the forage and leguminous seeds industries, and for other sectors, such as for the production of new vegetables, grass seeds, and the commercial production of herbaceous plants.

## Production

There is no official data on planting seed production, availability, or distribution by kind of seed or region. Therefore, Post uses official statistical data on crop production and yields, as well as unofficial estimates of planting seeds demand by major staple crops such as grains. Leguminous seeds continue to make up the main share of the planting seeds sector by volume. The majority of seeds used in grain production are saved seeds. However, in 2005 and 2006, use of common or certified seeds increased due to improvements in the management of grain and oilseed farms, as well as increased vertical integration in some segments of crop production. Increased grain production by more efficient farms also added to the use of improved planting seeds that, according to industry sources, are less affected by weather thus reflecting improvement in the average yields of many crops.

The evolving regulatory environment will drive the Mexican seed industry in the coming years. The new seed law is viewed by the industry as a positive step towards increasing competition and removing the government from the seed business. The plant variety law also gives plant breeders more protection in Mexico. Moreover, the new seed law establishes phytosanitary regulations for the importation of seed promises to improve access to the Mexican seed market for U.S. exporters.

The Mexican seed industry is made up of individual farmers, large multinational companies, national private seed companies, national public research and seed production organizations such as INIFAP, and international agricultural research centers such as CIMMYT (The International Maiz and Wheat Improvement Center).

Private companies were heavily regulated until the 1980s. Companies were limited to seed production and marketing, with only a few companies doing breeding. Today, however, private companies can now participate in any phases of the seed industry from seed production and conditioning to seed marketing and distribution.

Generally, private seed companies sell to distributors or directly to farmers. Some vegetable and flower seeds are sold to retailers such as supermarkets or garden supply stores.

Domestic seed is the main competitor of U.S. seed in Mexico. According to industry sources, in MY 2005/06 the United States supplied around 40 percent of all seed imports into Mexico with a total value of \$237.1 million. Multinational companies are able to source seeds from many different parts of the world. For example, Mexico also imports a substantial amount of sorghum, corn and soybean seeds from Brazil and Argentina, clover seed from Australia and Europe, and flower and vegetable seeds from Europe and vegetable seeds from Israel.

## Trade

Mexico primarily uses domestic seeds, however, imported seeds continue to play a major role in the sector. Imported seeds are becoming more common in the production of grass, leguminous, forage, vegetables, and horticultural crops. The quality of imported seeds also continues to improve. The total value of planting seeds imports in MY 2006/07 increased to US\$378.2 million from US\$372.6 million in the previous year. Total imports of planting seeds from the United States increased by 1.38 percent over the previous year's value to US\$237.1 million in MY 2005/06. Imports of seeds from the United States for grasses, forage and legumes for sowing increased by 14.06 percent to US\$131.7 million, with grass seeds showing the greatest increase from US\$39.6 million in MY 2005/06 to US\$43.3 million in MY 2006/07. Mexico's total exports of planting seeds to the world in MY 2006 increased in value to US\$160.4 million from US\$109.3 million the previous year. The greatest increase in exports came from leguminous seed, from US\$87.1 million to US\$133.9 million in MY 2006, followed by field crop seeds at US\$ 13.5 million in MY2006 from US\$7.6 million the previous year. Total exports of planting seeds to the United States from Mexico registered at US\$18.6 million in MY2006 a decrease of 8.08 percent from the previous year's figure.

In the coming years, U.S. exports of seeds to Mexico should be helped by the new seed law. The new seed law should lowers restrictions on seed trade while the existing variety law should give plant breeders more protection in Mexico. Moreover, the proposed rule that establishes phytosanitary regulations for the importation of seeds promises to create improved access to the Mexican seed market for U.S. exporters.

Corn hybrid seed, however, could be constrained for a number of reasons. The lack of water in many areas of Mexico could hamper hybrid corn usage. Likewise, many small farmers do not have the financial resources to switch to hybrids because of the higher price for seeds and the higher cost for inputs therefore, most of them will continue to use saved seeds.

## Statistical Tables

MEXICAN TOTAL SEED IMPORTS						
Seed Group	Quantity (Metric Tons)			Value (US \$ 000)		
	2005	2006	2007*	2005	2006	2007*
Field Crop Seeds	152,522	17,205	2,506	87,863	43,454	7,397
Grass Seeds	35,123	33,127	6,937	45,814	54,137	9,138
Leguminous Seeds	70,186	92,314	20,556	38,423	50,002	10,822
Other Forage Seeds	37,595	35,056	7,508	59,771	68,600	11,536
Other Seeds	60	347	9	15,755	19,700	2,082
Other Vegetable Seeds	1,228	1,184	162	124,947	142,378	14,982
Total	296,714	179,233	37,678	372,573	378,271	55,957

(Source: World Trade Atlas, Mexico Edition, February, 2007)

(\* Data as of February, 2007)

MEXICAN TOTAL SEED IMPORTS FROM THE UNITED STATES						
Seed Group	Quantity (Metric Tons)			Value (US \$ 000)		
	2005	2006	2007*	2005	2006	2007*
Field Crop Seeds	12,308	10,461	2,267	41,865	30,970	7,076
Grass Seeds	33,436	31,207	6,844	39,696	43,390	8,736
Leguminous Seeds	38,259	53,612	10,791	24,690	33,610	6,631
Other Forage Seeds	32,277	32,400	7,270	51,126	54,750	10,500
Other Seeds	69	205	6	11,628	11,510	1,261
Other Vegetable Seeds	876	895	96	64,956	63,016	7,256
Total	117,225	128,780	27,274	233,961	237,183	41,460

(Source: Source: World Trade Atlas, Mexico Edition, February, 2007)

(\* Data as of February, 2007)

FIELD CROP SEEDS						
Imports from:	Quantity (Metric Tons)			Value (US \$ 000)		
	2005	2006	2007*	2005	2006	2007*
The World	152,522	17,205	2,506	87,863	43,454	7,397
U.S.A.	12,308	10,461	2,267	41,865	30,907	7,076
Canada	137,566	385	144	38,792	0.137	0.057
Others	2,648	6,359	95	7,206	12,410	0.264

(Source: World Trade Atlas, Mexico Edition, February, 2007)

(\* Data as of February, 2007)

GRASS SEEDS						
Imports from:	Quantity (Metric Tons)			Value (US \$ 000)		
	2005	2006	2007*	2005	2006	2007*
The World	35,123	33,127	6,937	45,814	54,137	9,138
U.S.A.	33,436	31,207	6,844	39,696	43,390	8,736
Others	1,687	1,920	93	6,118	10,747	0.402

(Source: World Trade Atlas, Mexico Edition, February, 2007)

(\* Data as of February, 2007)

LEGUMINOUS SEEDS						
Imports from:	Quantity (Metric Tons)			Value (US \$ 000)		
	2005	2006	2007*	2005	2006	2007*
The World	70,186	92,314	20,556	38,423	50,002	10,822
U.S.A.	38,259	53,612	10,791	24,690	33,610	6,631
Canada	31,238	34,809	9,433	13,306	14,170	3,989
Others	689	3,893	332	0.427	2,222	0.202

(Source: World Trade Atlas, Mexico Edition, February, 2007)

(\* Data as of February, 2007)

OTHER FORAGE SEEDS						
Imports from:	Quantity (Metric Tons)			Value (US \$ 000)		
	2005	2006	2007*	2005	2006	2007*
The World	37,595	35,056	7,508	59,771	68,600	11,536
U.S.A.	32,277	32,400	7,270	51,126	54,750	10,500
Brazil	1,660	1,656	71	5,931	10,183	0.301
Others	3,658	1,000	167	2,714	3,667	0.735

(Source: World Trade Atlas, Mexico Edition, February, 2007)

(\* Data as of February, 2007)

OTHER SEEDS						
Imports from:	Quantity (Metric Tons)			Value (US \$ 000)		
	2005	2006	2007*	2005	2006	2007*
The World	367	347	9	15,755	19,700	2,082
U.S.A.	69	205	6	11,628	11,510	1,261
Others	298	142	3	4,127	8,190	0.821

(Source: World Trade Atlas, Mexico Edition, February, 2007)

(\* Data as of February, 2007)

OTHER VEGETABLE SEEDS						
Imports from:	Quantity (Metric Tons)			Value (US \$ 000)		
	2005	2006	2007*	2005	2006	2007*
The World	1,228	1,184	162	124,947	142,378	14,982
U.S.A.	876	895	96	64,956	63,016	7,256
Netherlands	17	34	8	23,905	29,243	2,210
Israel	0	0	0	7,252	7,472	0.539
China	175	114	27	8,940	10,962	1,346
Others	160	141	31	19,894	31,685	3,631

(Source: World Trade Atlas, Mexico Edition, February, 2007)

(\* Data as of February, 2007)

MEXICAN TOTAL SEED EXPORTS TO THE WORLD						
Seed Group	Quantity (Metric Tons)			Value (US \$ 000)		
	2005	2006	2007*	2005	2006	2007*
Field Crop Seeds	6,922	9,170	238	7,670	13,549	0.067
Grass Seeds	683	481	111	1,336	1,240	0.174
Leguminous Seeds	80,413	143,468	15,653	87,070	133,972	15,037
Other Forage Seeds	703	486	104	1,416	1,252	0.164
Other Seeds	146	225	46	3,523	3,411	0.525
Other Vegetable Seeds	250	245	59	8,374	7,000	2,197
Total	89,117	154,075	16,211	109,389	160,424	18,164

(Source: World Trade Atlas, Mexico Edition, February, 2007)

(\* Data as of February, 2007)

MEXICAN TOTAL SEED EXPORTS TO THE UNITED STATES						
Seed Group	Quantity (Metric Tons)			Value (US \$ 000)		
	2005	2006	2007*	2005	2006	2007*
Field Crop Seeds	3,424	2,260	228	1,833	0.824	0.055
Grass Seeds	371	375	81	0.457	0.372	0.042
Leguminous Seeds	6,862	8,055	1,341	6,129	7,448	1,266
Other Forage Seeds	391	380	75	0.537	0.384	0.033
Other Seeds	76	156	36	2,929	2,791	0.373
Other Vegetable Seeds	224	229	52	8,294	6,852	2,187
Total	11,348	11,455	1,813	20,179	18,671	3,956

(Source: Source: World Trade Atlas, Mexico Edition, February, 2007)

(\* Data as of February, 2007)

## Policy

Mexico's agricultural sector continues to experience extraordinary adjustment problems as the government seeks to move policy away from import substitution and self-sufficiency to a market oriented, competitively structured industry. High interest rates for agricultural loans have compounded the difficulty for producers, with overdue loans as a percentage of total loans in the agricultural sector among the highest in the economy. These adjustment problems have led to a sharp decline in agricultural productivity. Mexico's corn and dry bean production have recently reached record levels as government price support policies tend to favor these crops. Output of competing crops, whose supports were reduced during the period, experienced corresponding declines. Production of several crops should decline as planting decisions will be determined by market forces rather than exaggerated support prices. Depending on price relationships, increased production of corn, soybeans, cotton, sorghum, wheat, rice, as well as fruits and vegetables is expected.

The Mexican seeds industry has evolved from a highly regulated industry to one that is more market driven. Because of the growth of the seed industry in the 1950s, the Mexican government introduced the first seed law in 1961 established regulatory agencies to control research, seed certification, production and marketing. It also created PRONASE, which was charged with the production and distribution of commercial seed developed by INIFAP. SNICS (The National Service for Seed Inspection and Certification) was also created during this time to certify seed.

Until the 1980s, the majority of the marketing of basic grain seed was done by PRONASE. PRONASE controlled around 80 percent of the basic grain seed market because of the preference in selling its seed through the agricultural credit system. The private sector was under tight control.

Over the years, however, the influence of PRONASE decreased while the influence of private companies increased. For one, the economic crisis in Mexico during the 1980s decreased



government funding to PRONASE. Second, the opening up of the economy made it easier for private companies to operate. Today, PRONASE has been liquidated and is no longer in operation as decreed in the new seed law.

The seed law gives more flexibility to the private sector. Private companies are allowed to conduct breeding research. INIFAP can now distribute its germ plasm to the private sector. Finally, the seed law also allows private companies to market seeds without an official certification. The purpose of the new seed law is to conform to the NAFTA, lower restrictions on trade and remove the government from the seed business.

At a recent gathering among farmers in the state of Guanajuato, the Secretary of Agriculture, Livestock, Rural Development, Fisheries and Food (SAGARPA), Alberto Cárdenas, stated that national producers should not fear technology and its innovations but should be afraid of ignorance that maintains the country relegated below worldwide productivity. This indicates that SAGARPA is open to the use of transgenic seeds. Within the framework of the National Seed Plan the Secretary indicated that Mexico, today, has to compete with countries such as Argentina, United States, Brazil and China. For this reason, it is necessary to implement new methods that allow national producers to increase their productivity. The recent signing of the National Seed Plan is expected to improve the future of Mexico's farms with the cooperation of the agricultural sector and the federal government removing the obstacles that impede development. The success or failure in production will depend heavily on seeds, genetics, productivity and national, state and regional competitiveness of each individual farmer.

In this new plan, the participants will be centers of investigation and teachings, creators of new vegetable varieties, producers, farmers and government and the goal for 2012 is that arable land use a total of 300 thousand tons of certified seed.

The law titled FEDERAL LAW FOR PRODUCTION, CERTIFICATION AND SEED TRADE was finally published in the Federal Gazette (*Diario Oficial*) on Friday June 15, 2007 and will go into effect 60 days after the date of publication. The law calls for a modern legal framework that:

- Takes into account all types of seeds, not only those that are subject to an external process of qualification and certification, but all the alternatives the producer has for its adequate regulation.
- Strengthens seed trade regulation to assure farmers of the quality of seeds purchased.
- Mandates the establishment of the National Seed System as a coordinating mechanism and a Fund for Support and Incentives as its financial instrument.
- Clearly define the objectives that have to be considered in applicable seed policy matters.
- Establishes the catalogues that offer the possibility of registering varieties of common use allowing for official written evidence of native or traditional varieties and the management mode to promote their conservation.
- Harmonizes the seed qualification process and assigns categories in accordance with international standards that offer greater guarantees to end-users and opens market possibilities in the new seed trade context.
- Relates provisions within the valid legal framework in a harmonized manner and lays out the elements that offer long-term perspectives (intellectual property, biosecurity, phylogenetic resources).
- Strengthens the role of the Secretariat of Agriculture, Livestock, Rural Development, Fisheries and Food (SAGARPA) in matters of vigilance and compliance with the law.
- Grants greater opening and flexibility to perform and develop applied scientific investigation.

- Promotes the concept of qualification and quality of seeds according to their characteristics.
- Strengthens the technical elements and standards for the varietal characterization and the qualification of seed characteristics.
- Allows for the creation of Regional or State Seed Committees to promote participation and adoption of new and improved technologies.
- Expands the regimen of fines for infractions of legal provisions, thus helping with the organization of seed trade, which is a principal demand of the sector.
- Establishes the terms for issuing the budget rules and regulations to comply with the provisions of the law.

## Marketing

Biotechnology is expected to drive the Mexican seed market in the future. The evolving regulatory environment for biotech seed and their crops will affect variety approval and marketing prospects, and U.S. exporters should keep abreast of Mexican regulatory developments. As consumer choice expands, consumer education about variety characteristics will also play an important role in marketing seed.

U.S. seed exporters, new to the Mexican market, are encouraged to contact the following trade organizations for further information.

TRADE ORGANIZATIONS
THE U.S. AGRICULTURAL TRADE OFFICE (ATO) VALERIE BROWN JONES, ACTING-DIRECTOR LIVERPOOL NO. 31 06000 MEXICO, D.F. PH. (525) 5140-2614, 5140-2671; FAX (525) 5535-8557
MEXICAN ASSOCIATION OF SEED TRADERS (AMSAC) OLGA CECILIA TREVINO DE LA GARZA PRESIDENT AV. NUEVO LEON #209 – 601 AND 602 COL. HIPODROMO CONDESA MEXICO, D.F. PH. (525) 5516-0293; FAX. (525) 5272-1775
NATIONAL INSTITUTE OF FORESTRY, AGRICULTURE AND LIVESTOCK INVESTIGATIONS (INIFAP) SERAPIO RENDON # 83 COL. SAN RAFAEL MEXICO, D.F. CONTACT: PEDRO BRAJCICH GALLEGOS PH. (525) 3871-8701
NATIONAL SERVICE INSPECTION AND CERTIFICATION OF SEEDS (SNICS) AV. PRESIDENTE JUAREZ #13 COL. EL CORTIJO TLALNEPANTLA, ESTADO DE MEXICO CONTACT: ENRIQUETA MOLINA MACIAS <a href="http://www.sagarpa.gob.mx/Snics">www.sagarpa.gob.mx/Snics</a>

The following is a list of planting seed producers and distributors in Mexico. They are all member of the Mexican Association of Seed Producers (AMSAC)

**AGROPECUARIA LA SOLEDAD,****S.P.R. DE R.L.**

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TRIGO

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E-MAIL: [sverah@agroversa.com.mx](mailto:sverah@agroversa.com.mx)WEB: [www.agroversa.com.mx](http://www.agroversa.com.mx)*ING. SANTIAGO VERA HERNÁNDEZ*

ALFALFA Y SORGO

**AHERN INTERNACIONAL DE MÉXICO,****S.A. DE C.V.**

PROLONGACIÓN HIDALGO N° 818

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HORTALIZAS

**ALPASTO, S.A. DE C.V.**

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PASTOS

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HORTALIZAS

**BIDASEM PRODUCTORA Y****COMERCIALIZADORA DE****SEMILLAS, S.A. DE C.V.**

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MAÍZ, SORGO, TRIGO, HORTALIZAS Y

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**BIO INTERNACIONAL GENÉTICA DE****CASA I. TREVIÑO, S.A. DE C.V.**

**SEMILLAS, S.A. DE C.V.**

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HORTALIZAS, PASTOS, FLORES,  
H. AROMÁTICAS, FERTILIZANTES,  
HORMONAS, EQUIPOS HIDRO-  
PÓNICOS Y SEMILLAS ORGÁNICAS

**CASA MELGOZA DE ZAMORA,  
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HORTALIZAS, PASTOS Y FLORES

**COMERCIAL AGROPECUARIA DE  
AGUASCALIENTES, S.A. DE C.V.**

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MAÍZ, SORGO Y TRATAMIENTOS

**ENZA ZADEN MÉXICO, S.A. DE C.V.**

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HORTALIZAS

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**INSUMOS Y SEMILLAS PARA  
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HORTALIZAS

**MAR SEED COMPANY, S.A. DE C.V.**

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