

Mexico Cold Chain Pilot Program

Seed Money TKI Agri & Food
 Presentation for: TKI Agri & Food International
 15 December 2015, Peter Ravensbergen, Jim Groot

Agenda

1. Motivation and Project aim
2. Organization
3. Vellekoop & Meesters
4. Energy Greenhouse Park Querétaro

1. Motivation and Project aim

1 – Motivation

- SAGARPA develops their National Agrologistics Program (NAP)
- A Pilot program is created within the NAP
- In 2015 3 pilots will be selected to be implemented
- Need for Dutch knowledge and experience to succeed

2 – Project aim

- Identify, introduce and connect Dutch SMEs to co-design, co-operate and contribute together with the Mexican partners in a Cold Chain pilot in Mexico
- When possible connect to a pilot linked to the NAP or to the National Agri-Food Council (CNA)

1. Motivation and Project aim

Linked with Pilot program for the National Agrologistics Program (NAP)

- Objectives of the program
 - Reach clearly visible and tangible results that will be an example for other initiatives to replicate and multiply;
 - Build up knowledge in agri-food supply chains;
 - Reduce losses in the chain;
 - Reach a higher product quality that will open access to new high-end and export markets: higher turnover and profit;
 - Increase value of the product.
- Key elements in 2015
 - Preparation of the program for launch in 2016
 - Set up inventory of possible pilot projects
 - Select most 3 promising pilots and develop a detailed project plan for implementation in 2016

2. Organization beginning 2015

- Sponsor
 - Topsector Agri&Food International
- Project lead
 - Peter Ravensbergen (Program coördinator)
 - Jim Groot (Projectleader)
- Consortium Partners
 - Mexicultura
 - Fresh Food Technology
 - Vellekoop & Meesters
 - VDH In Control
 - Global Green Team

2. Organization

Change in government Mexico

- New Secretary of Agriculture
- 2 new Sub-secretaries
- Fired back office
- 3 month delay of Pilot Programme
- Uncertain budget allocation for Pilot Programme

→Result:

- Same project focus
- Change of interest of project partners
- Another initiative is a better option

2. Organization beginning 2015

- Sponsor
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- Project lead
 - Peter Ravensbergen (Program coördinator)
 - Jim Groot (Projectleader)
- Consortium Partners
 - Vellekoop & Meesters
 - United Farms




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Vellekoop & Meesters

- Vellekoop & Meesters introduced during mission with:
 - SENASICA (Food Safety institute)
 - Result: options for hiring V&M are discussed, Q1 2016 more news
 - SAGARPA (Ministry of Agriculture)
 - Result: options within Pilot Programme are limited for V&M




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Energy Greenhouse Park (EGHP) Querétaro

- 150 ha new Greenhouses for mainly tomatoes
- High tech
- Packaging centre for 250 ha
- Nursery
- New jobs: 2900 direct, 3000 indirect
- Efficient use of water, energy

Now: planning phase
Building infrastructure 2016




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EGHP investment needs

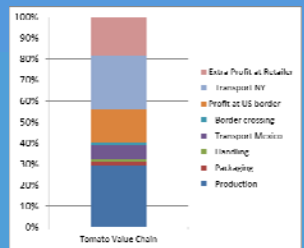
- Total investment of:
 - 277 mln USD
- Of which in greenhouses and technology:
 - 163 mln USD
 - Mainly Dutch companies supply this!!!
- Estimated economic rate of return:
 - >20%





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Target market

- Currently US border – Traders and wholesalers
- Future: Consumer items directly for US retail / Out of Home / digital market places
- Financial calculations are made for current situation



Category	Percentage
Production	~15%
Packaging	~5%
Transport Mexico	~5%
Border crossing	~5%
Profit at US border	~10%
Transport NY	~5%
Entire Profit to Retailer	~55%



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Future market

- Shift from boxes for US wholesale to consumer packages for direct shipments to US retail
- Analysis needed selecting
 - Retailers, Locations, Products, Packaging, Market size etc.
- Step wise development of market shift and production increase (incl packaging hall)




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Knowledge / technology needed

- 2016: Market strategy for combining a market shift with production/packaging extension and higher quality demands
 - Needed for backup investments / bank loans

- 2017:
 - Knowledge/technology needed for flexible packaging machines
 - Post harvest technology needed for delivery ripe tomatoes on large distances, incl monitoring
 - Nursery options
 - Water treatment options (incl Algae production)

Topsector Agri&Food could help with:

- Support by creating a PPS project idea for a crossover between TKI Agri&Food and TKI Tuinbouw

- Support by finding instruments to execute the research on the market strategy in 2016
 - RVO
 - New investment instrument *BuZa?*

Thank you for
your attention!

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