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Approved By:

Gabriel Hernandez

Prepared By:

Hugo Barragan Salin

Report Highlights:

Mexico's livestock sector must look back and try to return to those strategies that were implemented in the past for a long time. The support for promotion campaigns, commercial missions to bring potential buyers as well as enticing domestic producers to get to know the associations like Livestock Exporters Association of the United States, Cattlemen's Beef Board, American Lamb Board, presently at the U.S. livestock sector is a must. A stronger promotion of U.S. companies that sell semen in Mexico must be design to be in line with current needs of the Mexican livestock sector.

Executive Summary:

It is widely acknowledged that the United States is Mexico's main supplier of livestock genetics, especially in the case of beef and dairy cattle, pigs, poultry, and broilers. To create this report, the associations specialized in each of the breeds and species have been contacted and informed us about the history of animal imports and their estimated future and information was obtained from the Mexican government. The main genetics products that are imported are live animals, semen, and embryos.

General Information:

Beef Breeds

Angus

The American Angus Association is the nation's largest beef registry association with over 30,000 adult and junior members. The cattle is distributed across 48 U.S. states.

With more than 25,000 members, in the past fiscal year it registered 320,362 animals. According to the association, counting only Black Angus, valued on average at \$5,380 for females and \$6,740 for males.

This Association has a program called Certified Angus Beef (CAB) through which in 2015, 896 million pounds of beef were certified, which makes it the most important brand of beef in the United States. Mexico is the main importer of this brand, and thanks to the marketing of CAB, the numbers of the Mexican Angus Association have had the most important growth for beef cattle in Mexico. The Association is located in Lagos de Moreno, Jalisco. In Mexico, this Association registers both Black and Red Angus.



Black Angus bull



Black Angus cow

Red Angus

In 1954, seven visionary breeders gathered to establish a unique breeder's organization known as the Red Angus Association of America (RAAA).

Red Angus has had particularly strong growth in the last decades thanks to exports of cattle to Mexico, and Central and South America as a result of the breed's exceptional adaptation to tropical regions. In

Mexico, it is estimated that within a few years, it will occupy around 50% of the registrations in the Association. In brief, it is a great option to export to Mexico.

The main producing states of registered cattle in Mexico are: Chihuahua, Durango and Jalisco.



Red Angus bull

Red Angus cow

Angus Cattle

Year	Imports	Members
2011	123	128
2012	246	140
2013	235	149
2014	695	185
2015*	168	205

*Data collected from January to August 2015.

Hereford

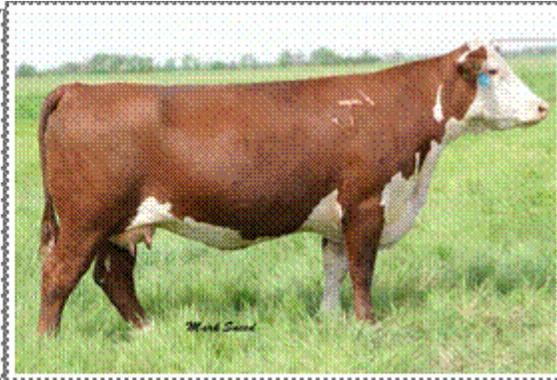
The Hereford breed was the most important in the United States between the 1960's and 1980's but later on it was surpassed by Angus due to a characteristic problem of the breed called pink eye, which was devastating until the vaccine was applied and only animals with pink skin surrounding the eye were selected to breed. There has been a comeback of Herefords popularity in recent years in the United States, and consequently, in Mexico too.

This breed also has great potential to export genetics to Mexico, especially in the northern and central areas. We can currently find registered Hereford cattle only in the states of Tamaulipas, Coahuila, Guanajuato, Jalisco, Aguascalientes, Zacatecas, Durango, and Chihuahua.

According to this association's registries, in the last three years its members have imported 1,500 semen units from the United States. This indicates the great genetic work they have been doing and it is expected that this breed will have rapid growth in the next 10 years in Mexico. Herefords Mexican Association is located in Chihuahua, Chihuahua.



Hereford bull



Hereford cow

Hereford Cattle

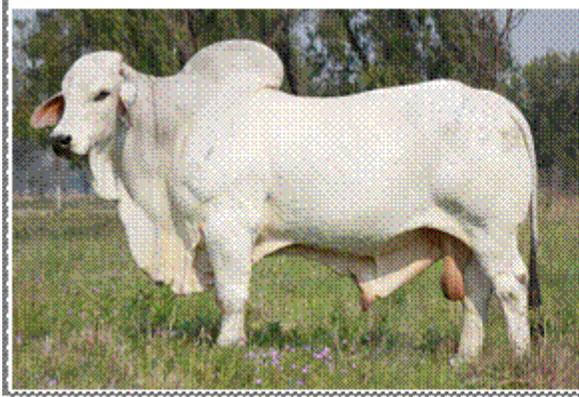
Year	Imports	Members
2011	-	-
2012	-	-
2013	-	-
2014	60	-
2015*	50	34

*Data collected until October 2015.

The American Brahman cattle, the first beef breed developed in the United States, does very well in vigor, heat tolerance, and efficiency compared to all other beef breeds.

This breed has great distribution mainly in the states of Texas and Louisiana. It has two varieties: gray and red. It is one of the breeds that has had the most influence in Mexico since the 1960's due to it being widely used in cross breeding programs and showing great adaptability to all of Mexico's climates.

In Mexico, the Mexican Zebu Breeders Association includes all varieties of Zebu, with Brahman being the main one. The most important place for doing business regarding Brahman cattle is the Houston Livestock Show and Rodeo, where most of the world's Brahman cattle breeders meet.



Brahman bull



Brahman cow

Brahman Cattle

Year	Imports	Members
2011		
2012		
2013	180	
2014	200	
2015		580*

*The total number of members of the Mexican Association of Zebu Breeders is 1,780 but 580 are active breeders and of these, around 400 are Brahman breeders.

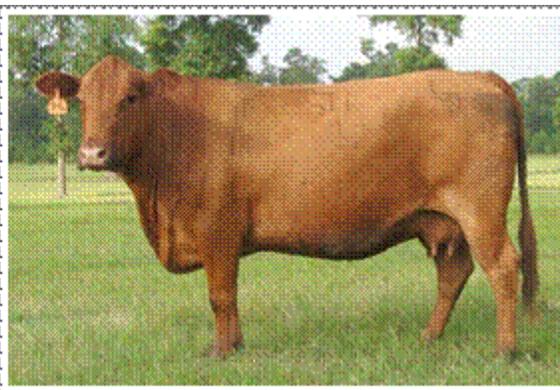
Brangus

This breed, also developed in the United States in the 1950's, has achieved distribution across 16 states and currently, mainly in its red variety, shows great potential to export to Mexico, and Central and South America. Due to its great adaptation skills and beef quality, it is being widely demanded by consumers.

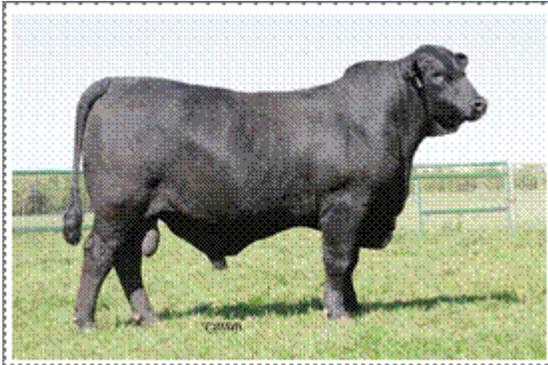
In Mexico, there are two Brangus Associations in Chihuahua, Chihuahua and Monterrey, Nuevo Leon.



Red Brangus bull



Red Brangus cow



Black Brangus bull

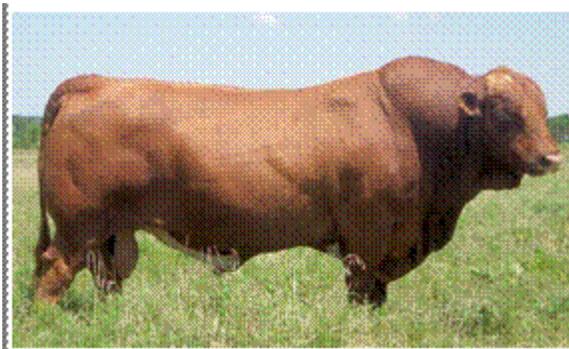


Black Brangus cow

Beefmaster

This breed was developed in the United States for beef production, and comes from the cross breeding of Hereford, Brahman, and Shorthorn. In 1954, it was recognized by the USDA as a purebred. Since the early 1970's, the breed has been expanding widely, reaching nearly 7,000 members. It has been selected based on hardiness, weight, fertility, disposition, conformation, and milk production.

The Beefmaster Mexican Association has more than 320 members all over Mexico and it is one of the beef cattle associations with the largest number of registries. The headquarters are located in Monterrey, Nuevo Leon.



Beefmaster bull



Beefmaster cow

Beefmaster Cattle

Year	Imports	Members
2012	118	
2013	221	
2014	252	
2015*	430	320

*Data collected until October 2015.

As we can observe on the chart, the inventory of exported animals from this breed is rapidly growing and it is expected to continue this way.

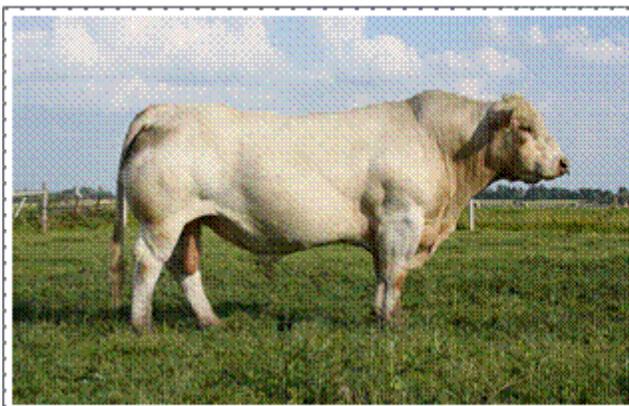
Charolais

This is a French beef breed, a cream-colored big animal, with horns, although in the United States some breeders specialize in the production of polled Charolais. In 1934, the first herd arrived to the United States from Mexico, with the most significant import activities in the 1940's. The breed was introduced into Mexico in 1930.

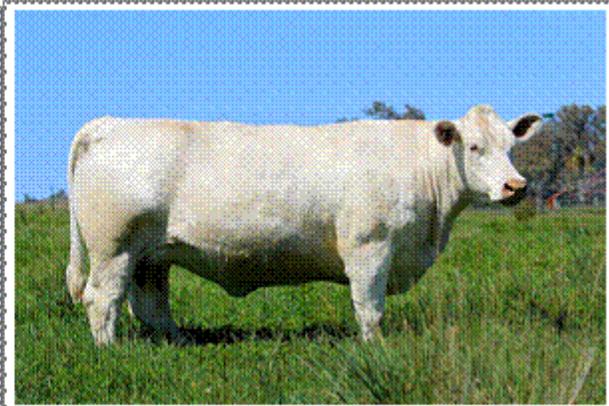
In the United States, as well as in Mexico, it has been used to cross breed with Brahman cattle to benefit from both breeds for better adaptation for tropical regions, creating the breed called Charbray.

In Mexico, in the first decade of this century, the registered breeding of this cattle has had fast growth. Even though Mexican breeders have been showing more interest for the French bloodlines, they have not stopped importing semen and animals from the United States. In Mexico many closely full-french animals exist.

In Mexico, the Mexican Association of Charolais Breeders is in Monterrey, Nuevo León.



Charolais bull



Charolais cow

Charolais Cattle

Year	Imports	Members
2012	85	454
2013	30	473
2014	117	462
2015*	134	441

*Data collected until October 2015.

Limousin

This is a French beef breed introduced to the United States in 1971 through the purchase of bulls from Canada. This breed developed in the United States mainly by cross-breeding and it currently has great acceptance for crossbreeding for lean meat.

In Mexico, breeders have preferred the French bloodlines, so since the 1990's they have been importing semen and embryos directly from France. As a consequence, this breed does not have a great future to export to Mexico. Mainly due to the fact that in the United States they have aimed more to the black bloodlines (black angus influence). In Mexico, the Mexican Association of Limousin Breeders is in Zacatecas.



Limousin bull



Limousin cow

Simmental

Even though there were some imports at the beginning of the 20th century, the breed started to be introduced more formally in the late 1960's and it was not until 1968 that the American Simmental Association was formed. Like the Limousin breed, this one grew based on absorption and although a few full blood animals can be found, they are mostly black, which means they also have the influence of Angus.

In Mexico, to begin with, the black or solid red color is not preferred, which means it doesn't have great potential, nonetheless, there are a few breeders from the United States who have had successful sales in Mexico when they have created full blood animals. In Mexico, the headquarters of the Mexican Association of Simmental are located in Monterrey, Nuevo León.



Simmental bull

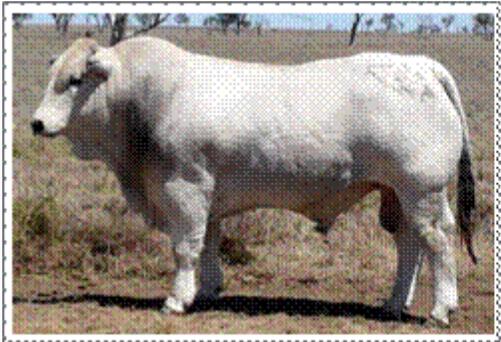


Simmental cow

Italian Breeds

Even though there isn't a big number of breeders for Italian breeds in the United States, some animals in Mexico have been exported, mainly Romagnola, although, some Chianina and Piedmontese breeds have

been exported as well. Based on these exports in Mexico, the Mexican Association of Italian Breeders was created in Nuevo Leon, Monterrey in 1992.



Romagnola bull



Romagnola cow



Chianina bull



Chianina cow



Piedmontese bull



Piedmontese cow

In Mexico, these three breeds have had great acceptance in crossbreeding programs with cattle of Brahman influence, so even though production in the United States is not very significant, there is great potential for a good promotion campaign in coordination with the Mexican Association.

Gelbvieh

In 1971 this breed, originally German, was introduced to the United States via semen imports the same year that the American Gelbvieh Association was founded. This breed was also introduced by crossbreeding. Most registered U.S. Gelbvieh are classified as purebreds (at least 88 percentage Gelbvieh),

the U.S. breeders have followed, as well as in other breeds, the tendency for black colored cattle. This Association has 1,400 members in the United States.



Gelbvieh bull

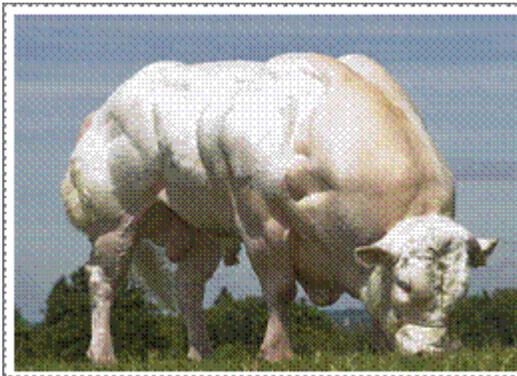


Gelbvieh cow

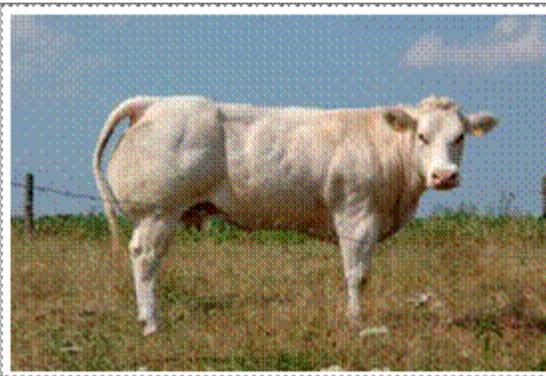
This breed was exported to Mexico in the 1990's to Yucatan and it has expanded to various states such as Sinaloa, Sonora, and Veracruz where it has been successful with the red bloodlines. The headquarters of the Association are located in Hermosillo, Sonora.

This breed has great potential for exports but it requires a good promotion campaign as it is not well known in Mexico.

Other beef breeds that could have great demand in Mexico, although there are not many breeders in the United States are: Belgian Blue and Galloway.



Belgian Blue bull



Belgian cow



Galloway bull



Galloway cow

Number of pure bred registered animals exported to Mexico

Year	Heads	USD
2012 (Total)	292	\$439,395
2012 (USA)	263	\$344,913
2013 (Total)	2,263	\$4,847,998
2013 (USA)	2,109	\$4,195,668
2014 (Total)	3,713	\$9,088,808
2014 (USA)	3,139	\$7,270,300
2015 (Total)*	5,207	\$9,317,641
2015 (USA)*	1,780	\$5,745,641

*Collection of data until October 2015.

In 2012, imports were depressed by a strong drought that affected Mexico as well as the United States. In 2015, the number has grown strongly due to great conditions that favor beef production and that the Mexican government made a direct import from New Zealand.

Dairy breeds

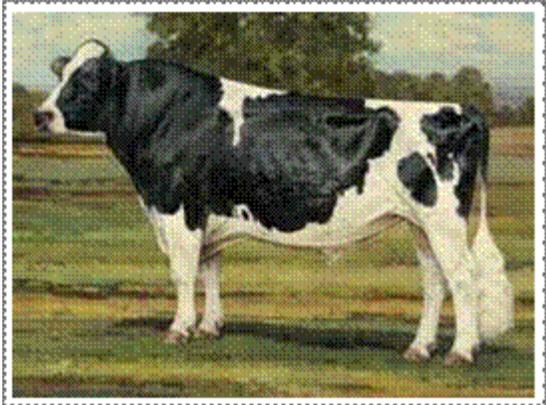
Holstein

Holstein cattle is the typical dairy cattle and it is the highest milk production breed. In the United States there are 22 million cows registered, which is considered the world's largest breed association. Each of these cows produces yearly more than 23,000 pounds of milk, more than 850 pounds of butter and more than 700 pounds of protein. Top producing Holsteins reach 72,000 pounds of milk in 365 days.

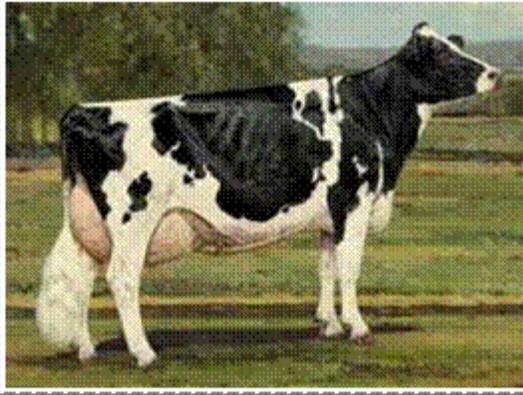
In Mexico, the Holstein Association is located in Queretaro. It is not as big as it is in the United States and has only around 100 members that milk around 30,000 cows. Nonetheless, there are more than 1 million grade Holstein cows. In the last four years 16,723 cows have been imported, but only a few have been registered in the Association.

The main import of Holstein breed in Mexico is through semen which are 650,000 straws yearly through more than 10 American AI Companies.

If 1/3 of Holstein cows in Mexico were artificially inseminated with U.S. semen, exports of semen straws would double compared to their current level. Consequently, we can say that it has great potential.



Holstein bull



Holstein cow

Data collected from the Mexican Holstein Association

Year	Imports
2012	221
2013	69
2014	104
2015	50

*Data collected up to August 2015.

Other breeds that are worth to mentioning are Jersey and Brown Swiss whose imports are not of lesser importance.



Jersey cow



Brown Swiss cow

In Mexico, the Jersey Breeders Association is located in San Luis Potosi. Although it is a small organization most Jersey cattle in Mexico are registered in it.

The Brown Swiss breeders Association in Mexico is located in Mexico City. It is a large association but most of the registered cattle is Braunvieh. This cattle has been used in crossbreeding programs with

Brahman cattle in tropical regions.

Dairy cows exports to Mexico

Year	Heads	USD
2012 (Total)	4,738	\$7,765,165
2012 (USA)	4,507	\$7,283,515
2013 (Total)	26,439	\$42,839,182
2013 (USA)	26,142	\$42,210,127
2014 (Total)	23,903	\$47,132,154
2014 (USA)	21,098	\$42,235,472
2015 (Total)*	11,813	\$22,595,553
2015 (USA)*	9,328	\$17,457,614

*Collection of data until October 2015.

The variation between years is highly influenced by the price of milk paid to dairy farmers.

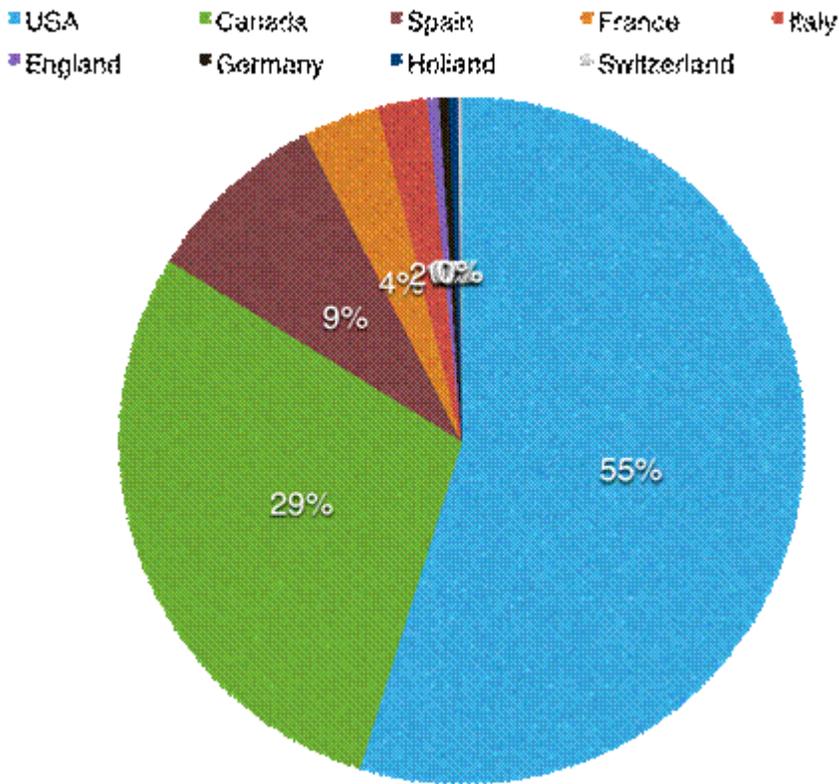
The most common method of entry into Mexico of U.S. genetics is through semen, as shown on the next chart:

Year	Customs Unit (kg) (World)	Semen Units*	USD	% Semen	% USD
2012 (World)	4,773.41		\$18,945,924		
2012 (USA)	2,132.77	710,923	\$12,366,081	44.68	65.27
2013 (World)	5,220		\$20,416,123		
2013 (USA)	2,462	820,667	\$14,002,506	47.16	68.59
2014 (World)	5,349		\$23,307,428		
2014 (USA)	2,698	899,333	\$16,962,577	50.44	72.78
2015 (World)**	3,515.92		\$17,352,010		
2015 (USA)**	1,823.90	607,967	\$12,685,511	51.88	73.11

* The number of semen units has been calculated based on an average conversion of customs unit to semen straws.

**Count up until October 2015.

More than 50% of Mexican semen straws imports come from the United States and more than 70% of its value is from the United States. Other countries that participate in the Mexican market are Canada with 28%, Spain with 8%, France with 3%, Italy with 2%, and Germany, Holland, England and Switzerland, all with less than 1%.



This chart shows how the pie was split in 2014. As we can see, the semen export potential is large. Although through time semen exports as a whole have been growing, as we can see in the chart above, it mostly is Holstein semen from the United States. In other breeds, the percentage of cows that are artificially inseminated in Mexico is still very low. With support programs of communication through the semen selling companies, this number can grow. The main U.S. companies that sell semen in Mexico are: ABS, CRI, Accelerated Genetics, Alta Genetics, and Select Sires.

Sheep

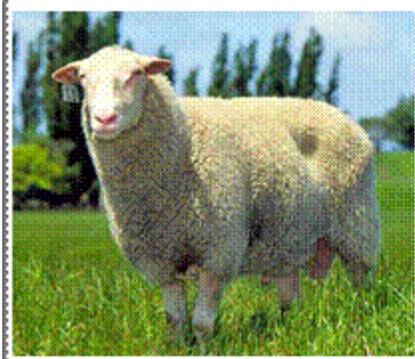
Mexico does not allow the import of sheep and goats from the United States due to the restriction regarding diseases caused by chlamydia and Q fever.

Mexico is an important consumer of sheep meat as it is included in many traditional dishes. In 2015, the Mexican government directly imported 45,112 head from New Zealand. This shows the great potential for sheep from the United States.

To be able to access this market, USDA would need to negotiate the export protocol for sheep and goats as the demand exists and the production in the United States is of good quality and well appreciated by Mexican sheep producers. The main breeds that would be demanded in Mexico are:

Friesian

This breed has been very fashionable in recent years in Mexico due to sheep producers finding good business in the production of artisanal cheese, which has great demand.



Friesian ram



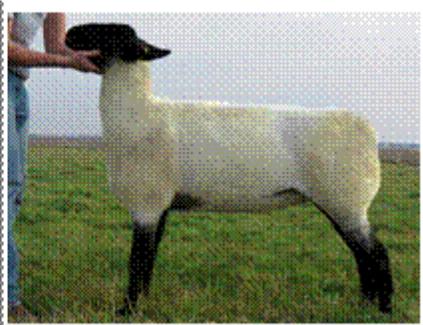
Friesian ewe

Suffolk

The demand of Suffolk has dropped in Mexico and been displaced mainly by hair breeds such as Katahdin or Dorper. Nonetheless, there are still some regions where it is very appreciated, for example, in the cold mountains.



Suffolk ram



Suffolk ewe

Rambouillet

This is a very hearty breed that is exploited in Mexico in the states of Chihuahua, Durango, Hidalgo, and San Luis Potosi.



Rambouillet ram



Rambouillet ewe

Romanov

A very prolific breed that has been used in cross breeding programs with local hair breeds like Pelibuey to produce meat.



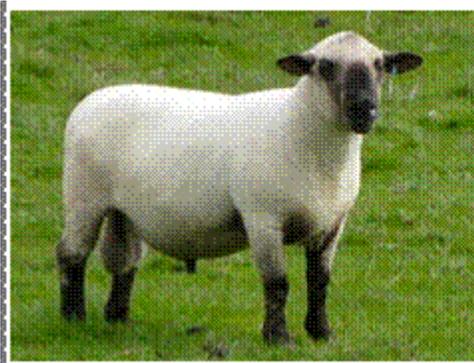
Romanov ram



Romanov ewe

Hampshire

A breed that is commonly used in the cold regions of Central Mexico in the states of Hidalgo, Estado de Mexico, Tlaxcala, Puebla, and Michoacán.



Hampshire ram



Hampshire ewe

Dorper

This breed is from South Africa, and has had great growth in Mexico, mainly in cross breeding programs with Pelibuey.



Dorper ram

Dorper ewe

Katahdin

This breed is originally from the United States and has great acceptance in Mexico as a hair breed that has adapted to the diverse climates in the country.



Katahdin ram

Katahdin ewe

Charolais sheep

This is a French breed that is used to produce meat in Mexico in cross breeding programs.



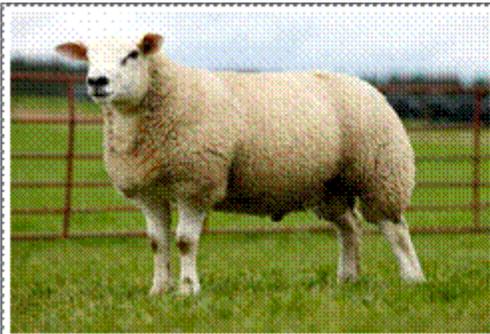
Charolais ram



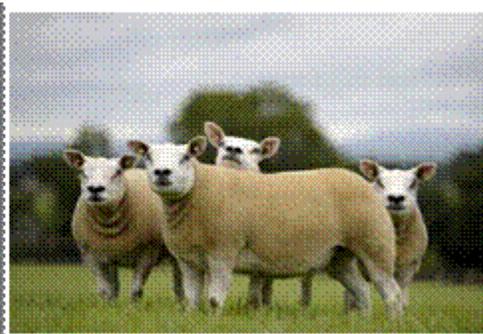
Charolais ewe

Texel sheep

This breed is originally from the Netherlands, recently introduced to Mexico and is becoming very popular due to its great muscling.



Texel ram



Texel ewe

In Mexico, all sheep breeds are grouped in the National Sheep Producers Union or Unión Nacional de Ovinocultores (UNO), which is located in Mexico City. Since 2004, Mexico has exported ovine genetics to Central and South America.

Goats

As well as with sheep, Mexico does not allow the import of goats from the United States due to the restriction regarding diseases caused by chlamydiosis and Q fever.

Mexico has become a large goat cheese producer and the demand for milk is rapidly growing in Mexico as it is also used to prepare goat milk caramel “cajeta”. The mainly produced breeds are Saanen goats.



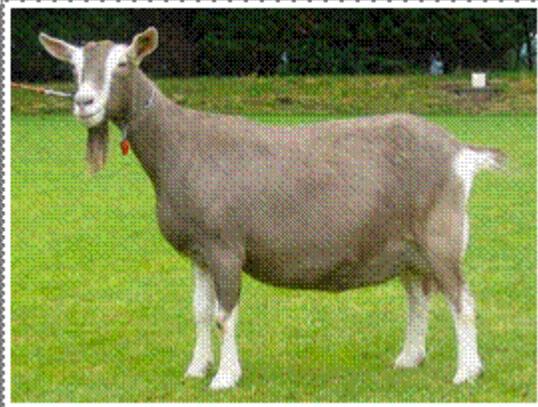
Saanen buck



Saanen doe



Toggenburg buck



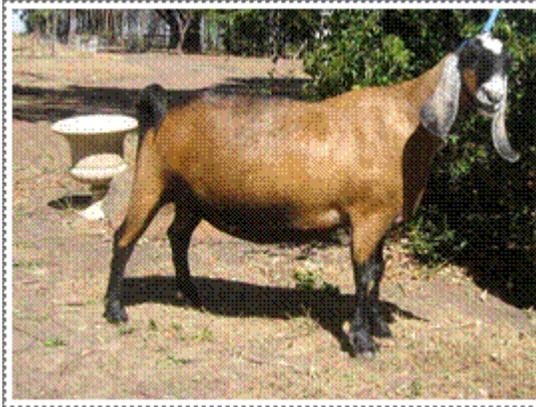
Toggenburg doe



French Alpine



French Alpine



Nublan buck



Nublan doe

Hogs

Mexico is a good hog producer but genetics depend in great measure on transnational companies which are in charge of importing most of the base lines called “great grand mothers” which are the ones that produce most of the breeders in Mexico.

The imports in recent years:

Year	Heads	USD
2012 (Total)	30,743	\$8,296,180
2012 (USA)	28,624	\$6,826,436
2013 (Total)	10,069	\$4,454,128
2013 (USA)	7,418	\$2,764,228
2014 (Total)	12733	\$4,577,051
2014 (USA)	3,197	\$1,496,773
2015 (Total)*	25,542	\$7,202,216
2015 (USA)*	23,594	\$6,543,826

*Data collected up to October 2015.

The main import companies are Pig Improvement Corporation (PIC) and Bachoco. The market has been affected by disease such as Porcine Epidemic Diarrhea Virus as producers try to rebuild herds.

Poultry and broilers

As with pigs, imports are made by transnational companies that have developed their genetic lines in the United States to breed them and supply hens as well as broilers to Mexican producers. The main companies are Bachoco SA de CV and Gallina Pesada SA de CV. This market has been positively affected by disease such as the avian influenza.

Imports of Breeding Hens:

Year	Birds	USD
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2012 (Total)	712,244	\$10,319,694
2012 (USA)	688,434	\$9,619,694
2013 (Total)	602,150	\$9,702,078
2013 (USA)	589,055	\$9,352,078
2014 (Total)	389,611	\$9,330,599
2014 (USA)	356,141	\$7,880,440
2015 (Total)*	420,512	\$10,388,606
2015 (USA)*	377,944	\$8,946,045

*Data collected up to October 2015.

Horses

The Quarter Horse and Thoroughbred are the breeds most exported to Mexico, which have greatly benefited by the work that the Commercial Office of Kentucky has done.

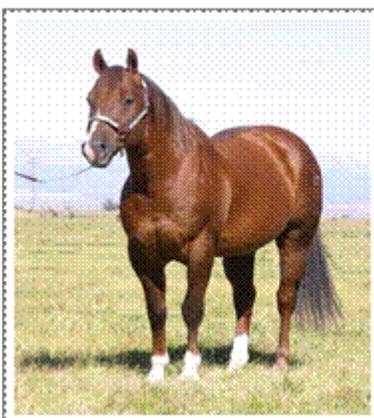
The following chart represents imports of U.S. Quarter and Thoroughbred horses by Mexico. Please note it includes not only horses for breeding but also sport/leisure animals.



Thoroughbred stallion



Thoroughbred mare



Quarter Horse stallion



Quarter Horse mare

Horse Imports:

Year	Heads	USD
2013 (Total)	45	\$278,935
2013 (USA)	19	\$29,000
2014 (Total)	64	\$387,499
2014 (USA)	58	\$373,000
2015 (Total)*	51	\$424,787
2015 (USA)*	35	\$54,400

*Data collected up to October 2015.

Conclusions

* The viewpoints expressed below do not necessarily represent those of USDA.

The Mexican genetics market is very broad. In 2014, it had an approximate value of over \$100 million, \$76 million of which came from the United States. In addition, this market will increase as the producers of dairy cattle, beef cattle, and pigs acquire more technical development and require better genetics.

Speaking about beef cattle, the United States currently imports nearly 1 million head of cattle from Mexico, so it is in the best interest of U.S. feedlots to have cattle with the best genetics, as it will have better performance in their stockyards and allow them to achieve better returns. More cooperation programs should be developed with Mexican genetics producers, so that they can supply the best genetics to commercial cattlemen who are the ones producing export-quality feeders. Additionally, the Mexican Secretariat of Agriculture, SAGARPA, along with the governments of the Mexican states, has subsidy programs so that small commercial cattlemen can easily acquire herd sires and cows as well as semen and embryos from Mexican genetics producers. In addition, prices of the calves that Mexico currently exports are very attractive, making Mexican cattlemen more profitable and able to invest more in genetics, which is a great opportunity for U.S. genetics producers who focus their campaign efforts on Mexico. U.S. producers of different breeds should consistently participate in cattle events in Mexico such as: livestock exhibitions, technical congresses, association assemblies, and producers and genetics companies should take Mexican producers to livestock events in the United States like exhibitions, seminars, auctions, ranch tours, etc.

In the case of dairy cattle, even though current milk prices obtained by producers are very low, discouraging them, imports of dairy cows have continued as many of the larger producers are not capable of producing all of their replacements, furthermore, they prefer imported animals, mainly because of genetics and sanitary matters.

The most important genetics export is semen. This is an input that, regardless of market conditions, must be purchased and its use is something that will continuously grow as the small cattlemen develop technically, because even U.S. market share is above 50%, there is still room to grow. It is important to support insemination companies which sell U.S. semen prompting them to conduct promotion campaigns and commercial missions so that Mexican cattlemen visit U.S. dairy farms and attend livestock exhibitions in the United States. Visits such as these were conducted in the past and are worth doing again. The United States' biggest competitor genetics is Canada, who has been working very hard

and doing successful promotions.

Regarding sheep and goats, the Mexican market exists and is really attractive, however, U.S. producers as well as the government, need to work arm-in-arm to establish the necessary sanitary protocols for the exportation of genetics to Mexico. Mexican sheep and goat producers have achieved market access in Central and South America, stimulating them to keep improving the genetics of their livestock and U.S. genetics would be of great help. U.S. producers should definitely take advantage of this opportunity.

If we talk about pigs, it is important to recognize that Mexico's pig herd stands at approximately 9.7 million head and is the second largest in Latin America. Even though the big companies are already present in the genetics market, the exports volume could be increased striving for a better distribution among medium and small sized producers in Mexico.

Regarding meat and egg laying birds, the production is increasingly concentrated in the hands of fewer people, consequently, the work that big transnational companies are doing to supply the Mexican market will continue to grow according to the market's needs. U.S. genetics companies should investigate the opportunities in this market before committing substantial resources.

Continuing with the research we found that horse genetics commerce will continue, although not in a large scale as there is much collaboration between Mexican and U.S. breeders. In fact, there are many champions in the United States that are Mexican.

As final recommendations, we have to look back and try to return to those strategies that were done in the past for a long time, support for: promotion campaigns, commercial missions to bring potential buyers as well as taking national producers to get to know the market, associations like Livestock Exporters Association of the United States, Cattlemen's Beef Board, American Lamb Board, etc. and make a stronger promotion through U.S. companies that sell semen in Mexico.

Ing. Hugo Barragán Salín
Agriculture Consultant.
E-mail. barrasalinhugo@hotmail.com
Phone +52 (442)1864317

Appendix 1.

Associations Directory

Asociación Angus Mexicana, A.C.
Address: Blvd. Orozco y Jiménez No. 2306
Fracc. Los Jacales Lagos de Moreno, Jal. C.P. 47470
Tels: (01 474) 741-77-71 (01 474) 741-77-71
Fax: (01 474) 741-77-70

E-mail: angusmex@yahoo.com.mx

Asociación Mexicana de Criadores de Ganado Beef Master. Address: Av. Juárez y Exposición 940 Ote.
Terr. Exposición Ganadera, Cd. Guadalupe, Nvo. León C.P.67150

Tels: (01 81) 8337-19-38 (01 81) 8337-19-38

Fax: (01 81) 8337-19-39

E-mail: info@beefmaster.org.mx

Web: www.beefmaster.org.mx

Asociación Mexicana de Criadores de Ganado Brangus, A.C. Address: Km.8.3 Carr. Chihuahua-
Cauhtémoc A.P.E-5

Chihuahua, Chih. C.P.31020

Tels: (01 614) 434-1190 (01 614) 434-1190 , 434-05-75

Fax: (01 614) 434-1180

E-mail: gerencia@asociacionbrangusmexicana.org

Asociación Mexicana de Criadores de Cebú. Address: Naranjo #1006, Esq. Roble, Col. Águila
Tampico, Tamps. C.P.89230

Tels: (01 833) 213-43-51 (01 833) 213-43-51 , 213-41-93, 213-42-44

Fax: (01 833) 213-93-03

E-mail: info@cebumexico.com

Web: www.cebumexico.com

Asociación Charolais Herd Book de México.

Address: Av. Benito Juárez # 940 Ote., Terr. Exposición Ganadera

Cd. Guadalupe, Nvo León, C.P. 67100

Tels: (01 81) 8367-90-23 (01 81) 8367-90-23 , 367-90-24

Fax: (01 81) 8367-90-25

E-mail: chbm@nl1.telmex.net.mx www.charolais.org.mx

Asociación de Criadores de Ganado Gelbvieh y Gelbra de la República Mexicana, A.C. Address: Calle
Anza No. 114 esq. Juan G. Cabral

Col. Pitic, Hermosillo, Son. C.P. 83150

Tel y Fax: (01 66) 2254-4141

E-Mail: gelbviehson@hotmail.com

Asociación Hereford Mexicana.

Address: Km. 8.5 Carr. Chihuahua - Cauhtémoc

Col. Las Ánimas, Dentro del Complejo de la U.G.R. Chih. Chihuahua, Chih. C.P.31450

Tels: (01 614) 434-19-20 (01 614) 434-19-20

Fax: (01 614) 434-19-20

E-Mail: herefordmexicana@hotmail.com

Asociación de Criadores de Holstein - Friestan de México. Address: José María Arteága # 76 Altos,

Col. Centro Querétaro, Qro. C.P.76000
Tels: (01 442) 212-02-69 (01 442) 212-02-69 , 12-64-63
Fax: (01 442) 224-39-33
E-Mail: direccion@holstein.com.mx
WEB: www.holstein.com.mx

Asociación Nacional de Criadores de Ganado Jersey de Registro, A.C. Address: Amado Nervo No. 1561-5, Col. Polanco
San Luis Potosí, S.L.P. C.P. 78220
Tels: (01 444) 841-62-88 (01 444) 841-62-88
Fax: (01 444) 833 -75-26
E-Mail: jerseymex@prodigy.com.mx

Asociación Mexicana de Criadores de Ganado Limousin. Address: Calle 17 de Octubre No.202, Int. 3
Col. Fracc. Barros Sierra, Zacatecas, Zac. C.P.98090
Tels: (01 492) 922-32-78 (01 492) 922-32-78 , 5-13-60
Fax: (01 492) 925-13-60
E-mail: limousin_zacatecas@yahoo.com.mx; limousinn@prodigy.net.mx
WEB: www.limousinmexico.com

Asociación Mexicana de Criadores de Razas Italianas. Address: Av. Benito Juárez #940, Ote.
Terr. de la Exposición Ganadera, Cd. Guadalupe, Nvo. León
C.P.67100
Tel. y Fax:(01 81) 83-37-88-23 Ext. 129
E-Mail: amecri@yahoo.com

Asociación Simmental-Simbrah Mexicana. Address: Tepatitlán #715-A, Col. Mitras Sur Monterrey,
Nvo. León, C.P.84020
Tels: (01 81) 8333-61-39 (01 81) 8333-61-39 , 333-96-41
Fax: (01 81) 8333-62-58
E-Mail: info@simmental-simbrah.com
WEB: www.simmentalsimbrah.org.mx

Asociación Mexicana de Criadores de Ganado Suizo de Registro. Address: Andalucía #162, Col.
Alamos
México, D.F. C.P.03400
Tels: (01 55) 55-38-19-06 (01 55) 55-38-19-06
Fax: (01 55) 55-19-93-95
E-Mail: amcgsr@amcgsr.com.mx

WEB: www.amcgsr.com.mx

Asociación Mexicana de Criadores de Ganado Caprino de Registro, A.C. Address: Av. Tatanacho 799
Int. 108

Fracc. Tangamanga, Plaza Las Palmas

San Luis Potosí, S.L.P. C.P.78269

Tel: (01 444) 817-9481 (01 444) 817-9481

Email: amcgr@hotmail.com

Asociación Mexicana de Reproductores de Ganado Porcino de Registro. Address: Rodolfo Gaona No.
107

Col. Plaza de Toros

León, Gto. C.P. 37460

Tels: (01 477) 771-97-06 (01 477) 771-97-06 , 771-97-07 (01 477) 712-07-80 (01 477) 712-07-80 , 12-03-60

Fax: (01 477) 715-15-71

Unión Nacional de Ovinocultores

Address: Melchor Ocampo #405, 2o. Piso

Col. Nueva Anzúres, México, D.F. C.P.11590

Tels: (01 55) 52-55-36-65 (01 55) 52-55-36-65

Fax: (01 55) 52-55-21-11

E-mail: uno@uno.org.mx

WEB: www.asmexcriadoresdeovinos.org