

Baii



Specially presented by Ball SB future cut flower for California 2017.

Welcome !

2017



Part I :Presented by Joaquin de La Torre , Managing partner BallSB

State of the Industry

Bail

- After the perfect storm of 2009 to 2011The period 2014 2017 has been one of the quieter years we have had, but with good opportunities to grow
- 2014 2016 was a year of a final consolidation of all the acquisitions, bankruptcies and chapter 11 we had in the last five years. At all levels in the industry from breeders to retailers
- It has been a good time for companies to fix their balance sheets
- We are in a market that has had a steady, but small growth
- The expectations and common opinion is, that 2016 2018 will be very similar to last year

State of the Industry

Bali

- Along the chain in the industry companies are doing well this is true in:
 - Breeding Companies
 - Production with few exception specially in Ecuador
 - Wholesalers and importers
 - And retailers

State of the Industry

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- Stability in the market
- Amount of stems in the market has been quite stable from all sources
- Stability in the exchange rate (this could change during 2017 2018)
- Political events Brexit , NK, the No in Colombia, USA elections and EU Elections(no one now the effects they will have in the real economy)
- In essence even though we see the cut flower market stable and growing, political events are casting a certain degree of uncertainty
- The quality of flowers sold today in some supermarkets in the USA is the best it has ever been. This should continue to improve

Possible new Trends



- Exports from Mexico to the USA will grow and more field production move to Baja?
- As labor issues continue to affect USA production which products will move south to Baja?
- The effect of Canabbis will affect the production in Ca in the short term
- China will become an important player and in the next few years will become a net importer of flowers. It can come quite fast as important as Russia
- South America and African product will compete for the market.
- This will be quite important as will reduce the number of flowers in other markets
- Will we see higher rates of growth in Colombia, Mexico, Kenya Ethiopia?
- Flower production in Kenya was reported to have increased by 17% in volume and 20% in value. We have to wait for the import reports from the importing countries.

Issues we need to deal with

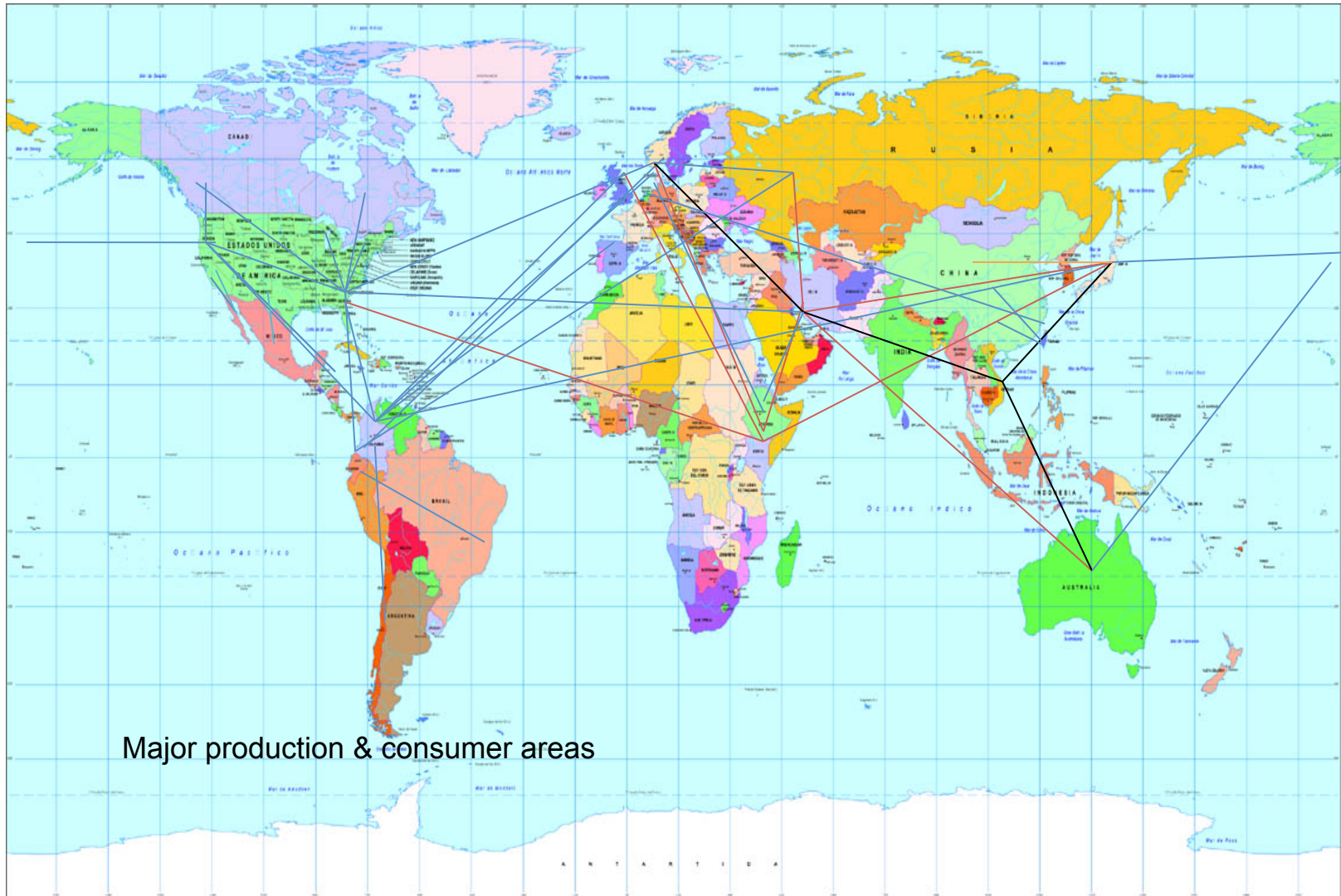
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- We continue to have problems in stimulating purchases of flowers outside the holidays
- Every day consumption specially in the USA is the key to a more stable and profitable industry
- Labor is the single biggest problem in the industry today. Its gravity changes from country to country
- Lack of land will also affect the availability for production to grow. Therefore we will see a pressure to improve productivity of the actual greenhouse space available

Final thoughts

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- There are several issues that can affect the actual positive state of the industry within the industry issues such: climate change, labor issues, land availability, diseases etc.
- But what can generate more instability are political issues outside the industry. These are difficult to predict, and some times more difficult to deal with as they can affect the economy of a particular country as happened in Russia in 2015
- There serious differences among countries that used to be united in a particular line of thought. The problem here is if in the process of finding new World Order the mayor economies of the world will suffer ?





Part II: Presented by Lourdes Reyes , BallSB Marketing Director



Baïï

Future Crops for California

Color the worldthrough flowers !

How to be different with bouquets?...
with ...

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- 1.- Different flower variety
- 2.- Different design
- 3.- Different packaging
- 4.- Diferent program





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DELPHINIUM

Bali



Types of Delphinium

1.-Elatum type great for big arrangements



Vertical flowers give the wild CA look

Bali

2.-Belladonna type great for bouquets



Types of Delphinium for CA

Spray Belladonna type great for bouquets
Delphinium "Sunshine"

Bali



Delphinium Elatum type



- Triton Series (Miyoshi):
Dark Blue & Light blue)
- Ariel Series : (Miyoshi)
Lavender & White improved
- Guardian (PAS):
white, blue, lavender

All from seeds

New varieties are programable
and do not shatter

DELPHINIUM

ELATUM TYPE TRITON SERIES

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Triton dark blue



Triton light blue



seed

DELPHINIUM

ELATUM TYPE ARIEL SERIES

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Ariel lavender **New**



Ariel improved white **New**



seed

Delphinium Guardian
Vertical flower



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Delphinium Belladonna type

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Delphinium Belladonna type

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Waltz Series TC (Miyoshi)
Sea, Sky, Ocean, Star

- Programable & super productive

Trick series: TC
Blue, Pink, Yellow

- Spray “Sunshine” TC
(Miyoshi)

DELPHINIUM

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Belladonna type Waltz series



Sea Waltz



Sky Waltz

TC

DELPHINIUM

Bali

Belladonna type Waltz series



Star Waltz type Code UA , with White Bee

TC

DELPHINIUM Belladonna type Trick Blue



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From TC (Tissue Culture)

CA look !

DELPHINIUM

Belladonna type Trick series pink & yellow

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TC

Bali



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Wild and different!



Spray Belladonna type

Great for bouquets

Delphinium “Sunshine”



Delphinium Spray Sunshine
.....a MUST !...

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Delphinium SPRAY Belladonna type SUNSHINE

CHEERS!

New : unique spray Delphinium

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Limoniums

Bali



LIMONIUMS

Fillers from TC



Limonium Sinensis Eversnow (perennial)
Macaroon & Sun

Limonium Sinuatum Super Purple (Statice=Sinuatum)

Limonium Sinzii (Sinuatum X Perezii)

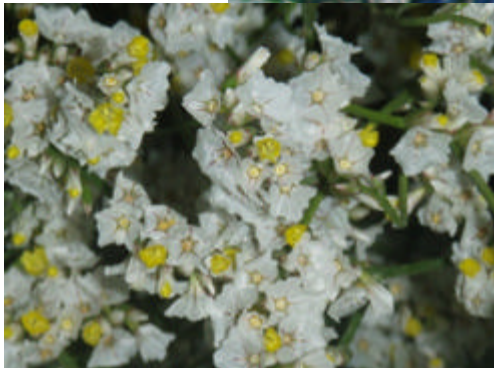
Limonium Hybrid : Skylight & Silver pink

Limonium Altaic : Shooting Star

Limonium Sinzii : Sinuata X Perezii

Limonium Sinensis Eversnow (perennial)

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Eversnow

Limonium Sinensis Macaroon

Bali



Limonium Sinensis Macaroon

Bali



Limonium Sinensis SUN

Bali



Limonium Sinensis Ever SUN

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Limonium Sinuatum



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Limonium Sinuatum Super purple



- **Stem height:** >110 cm
- **Stem diameter:** 0.91 cm
- **Brush lenght:** 6,5 cm
- **Stem weight:** 50.9 g
- **Vase life:** >20 days
- **Crop time:** 15 weeks from planting;
- **Productivity:** 208 stems/sqm/year
- **Available from:**

Limonium Sinzii



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Perezzii X Sinuata = Sinzii

Filler

More resistant to botrytis

Limonium Sinzii



Sinzii Silver , Deep Blue & Lavender

Limonium Sinzii

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flat



Purple



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Flat stem

With two stems
You get huge
Volume...



Criss-cross
Huge
Volume !

Limonium Sinzii

Criss cross , volume



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Purple

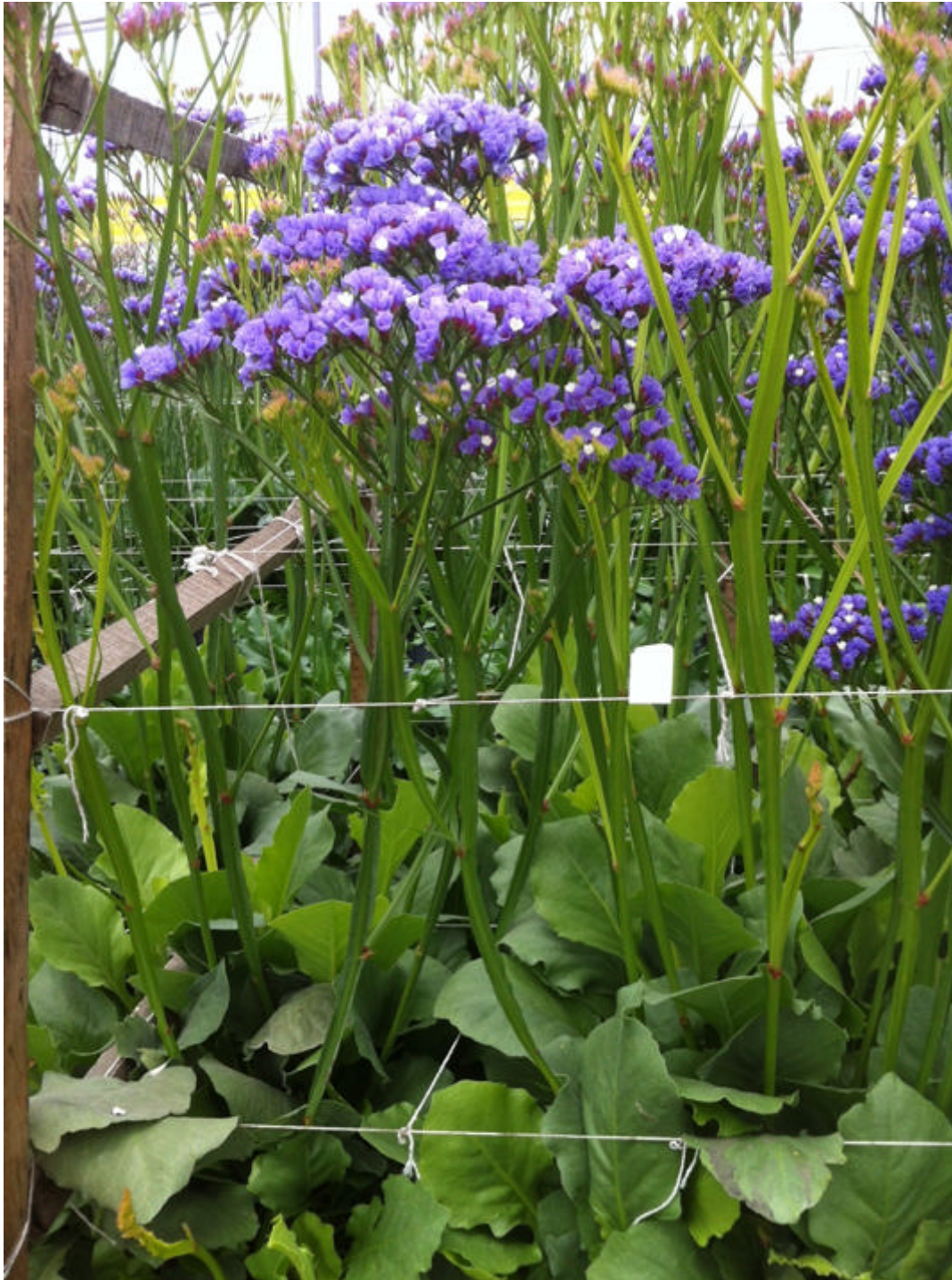
Limonium Sinzii

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Silver
Pinky - White

Sinzii



All flowers on top
Great filler

Taking market share from
Sinuatas



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Perennial

Limonium hybrids



Odorless

Limonium Skylight (Hybrid)



- **Weeks to start production:** 20
- **Productivity:** 76,24 stems/sqm/year
- **Stem height:** 86,6 cm
- **Stem diameter:** 0,54 cm
- **Stem weight:** 54,5 g
- **Vase life:** >12 days
- **Plant useful life:** > 5 years



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Productive

In Fashion



Ball

“The new odorless
Limonium Skylight
By Ball.
My choice for an
Odorless great flower
Arrangement”

Pieter Landman
Flower designer

Limonium Silver Pink (Altaic)



- **Weeks to start production:** 25
- **Productivity:** 82,4 stems/sqm/year
- **Stem height:** 80,0 cm
- **Stem diameter:** 0,55 cm
- **Stem weight:** 47,5 g
- **Vase life:** >12 days
- **Plant useful life:** > 5 years

THE NEW
Cool

LIMONIUM!

Silver Pink



Limonium Shooting Star (Altaic)



- **Weeks to start production:** 26
- **Productivity:** 90,6 stems/sqm/year
- **Stem height:** 88,0 cm
- **Stem diameter:** 0,59 cm
- **Stem weight:** 54 g
- **Vase life:** >12 days
- **Plant useful life:** > 5 years

Gypsophila

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Bred with
Sustainability
in mind!!

Medium size flowers



Gypsophila Mirabella

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Super white !!!

No lights :
Saves Energy

Leaf Minor resistant:
Less pesticides

No Methil Bromide

Medium Size Flower

Bred with
Sustainability
in mind!!





Balli

Gypsophila Mirabella

Super White !

Not all Gyps are grown in South America , we have our own, CA Grown MIRABELLA

Dusty Miller

Baï



Dusty Miller

Baï



Dusty Miller
From seeds
Filler
PAS

Baïi



DIANTHUS

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BaïSB

Sweet

Dianthus



We recommend:

- Green Ball. Cuttings (Miyoshi)
- Sweet (PAS)
- Amazon. Seed (PAS)
- Chocolate crazy Ball .cutting (PAS)

Dianthus Sweet

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Focal flower

Needs to be cut open if not it will not last



Dianthus Sweet from seeds



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Dianthus Sweet from seeds
therefore you can program your colors for your peaks

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Sweet
New White



Sweet Black Cherry

Dianthus Sweet



Bali

Sweet Coral



Sweet Purple



Dianthus Sweet



Sweet Scarlet



Sweet Red



Dianthus Sweet bicolor



Purple with white eyes. Short

Dianthus Sweet MAXINE

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Sweet true rose



Dianthus Sweet Maxine

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Pink

Breeder :PAS

Dianthus Sweet Pink Maxine

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Dianthus sweet Pink Magic



Bali

Dianthus sweet Magenta bicolor

Bali



Dianthus sweet Pink

Bali



Dianthus sweet Magic Innovative ...

Baïi

Specs :

- Stem height: >60 cm
 - Stem diameter: 0.6 cm
 - Flower diameter: 8.0 cm
 - Vase life: >12 days
 - Crop time: 14 weeks
 - Productivity: 80%
 - Seed Item
-
- Density :
 - Productivity : one stem /flush
Can leave more stems but not recommended



DIANTHUS

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Green Ball

Dianthus Green Ball

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Cutting . Mother plants

Dianthus Green Ball

Ball

Uneven at the beginning of the crop , then it even's up



Cutting . From Mother plants

Green Ball team...

Deli



Green Ball vs. Green Trick

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If the head size is bigger than 6 cm is called Green Ball. Tall stems
If it is less than 6 cm is called Green Trick . Short stems

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Natural green color



Tinted

Dyed Green Ball



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Green Ball & glitter



Ball

A little something....

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DIANTHUS

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Amazon

Dianthus Amazon
Filler flower



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Amazon Cherry & Purple



Amazon Rose Magic



Amazon Green

Seed





Stock, Mathiola

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Aroma & color !!

Spray Stock



Stock

Bali



Stock Standard



Stock spray

Stock Katz

Breeder:
Pan American Seed

From: Seeds



Bali

Stock Katz

Bali



Stock Katz



Bali

Cherry

Stock Katz

Pink



Lavender



Light Lavender



Ball

Stock Katz

White



Yellow



Apricot



Bali

Stock Katz
Crimson

Bali



Stock Katz
Purple



Bali



Stock standard
Kid series

Yellower



Bali

Spray Stock

Bali







Spray Stock 98% doubles . White & Yellow

In nature stocks come 50% with singles flowers & 50% double flowers

The double flowers are the commercial ones, singles do not have vase life

The only colors that can be selectable by the seeds are yellow and white therefore only ones with 98% doubles.

Spray Stock :

Selected by seed Yellow & White , 98% doubles

Spark White & Spark Yellow.





Spray Stock 98% double flowers

Bali

Spark White



Spark Yellow



Snapdragons, Antirrhinum



Snapdragon



We recommend:

- Potomac
- Early Potomac
- Maryland
- Monaco
- Cool

Verticality

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Simple and beautifully vertical !

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Snapdragons

Different colors

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Rubi red



Lavander



Pink Flamingo



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Open cut

Snapdragons

Bali



Snapdragon

Potomac Crimsom

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New Bicolor , Unique!

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Snapdragon Red Dahlila



New BICOLOR , striped!

Snapdragon Purple Twist

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For verticality... another must ...

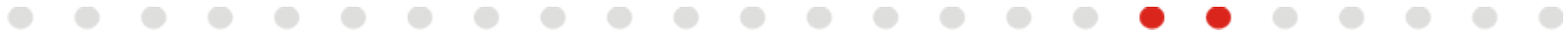
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Campanula



BaïSB



Campanula CAMPANA

White



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Blue



Pink



Lilac

Campanula : Champion & CAMPANA

Bali



Matricaria

Bali



Matricaria

Baïi



Matricaria

Baïi



Matricaria

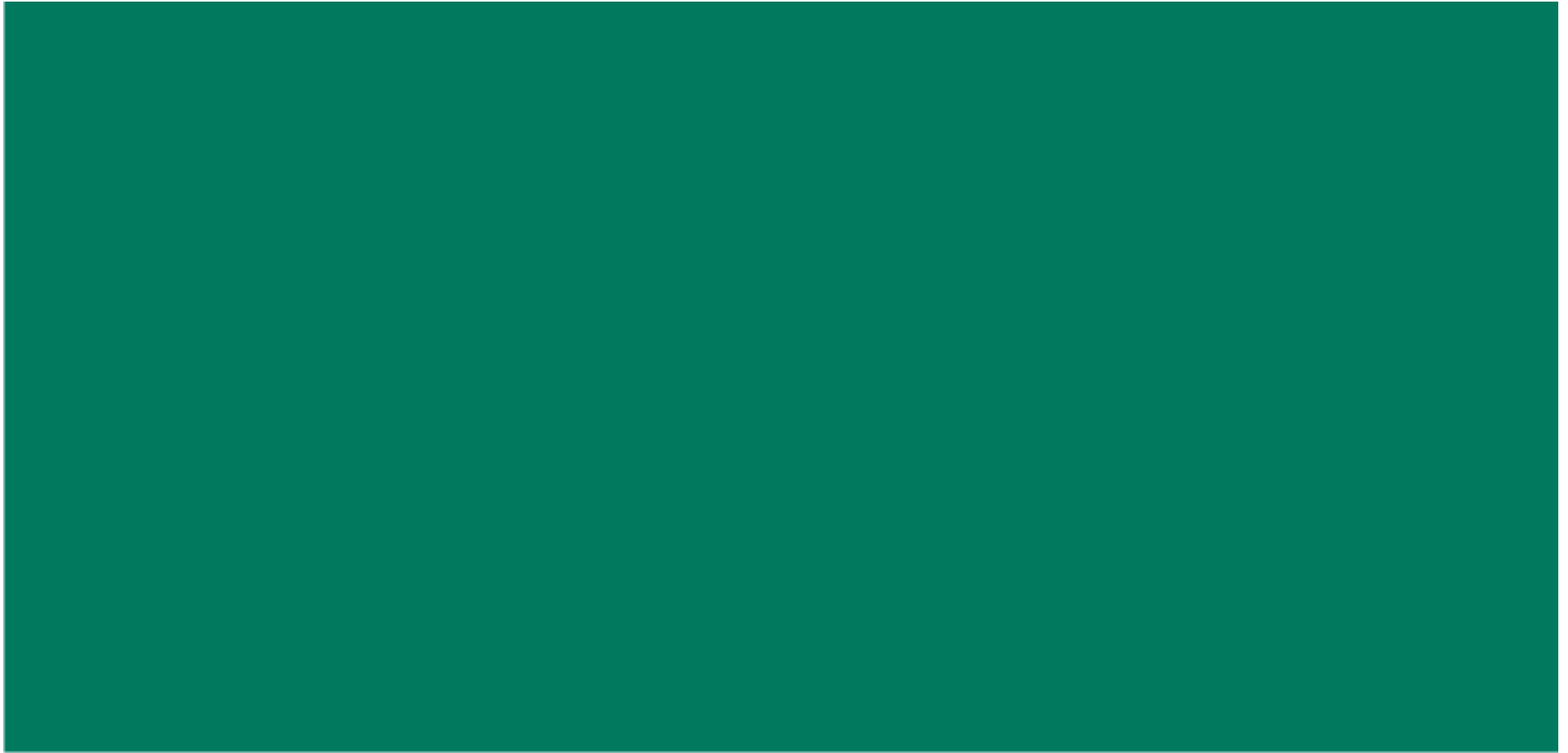
A perfect combination for tulips !

Baïï



Trachellium

BaII



Trachellium



Baïi



Trachellium



Baïi



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Ammi majus
Gophrena



SUN FLOWER

Bali



Sunflower types

Our recommendations...

Core Color	Variety	Stem Lenght (cm)	Stem Diameter (cm)	Flower Diameter (cm)	Number of petals	Vase Life (days)	Days to start production	Average Productivity	Potential	Breeder	Alternative for
Yellow	Vincent Fresh	109.0	1.14	12.4	22	12	51.0	82.3%	Comercial	Sakata	
	Sunrich Gold	97.4	0.8	11.6	22.7	10	49.0	81.3%	Comercial	Takii	
Brown	Sunrich Orange	71.4	0.7	11.4	21.9	10	46.3	67.0%	Comercial	Takii	
	Sunshine Max	158.7	1.04	15.1	48	9	56.5	72.4%	Comercial	Grofit	Sunbright
	Sunbright	109.0	1.0	10.9	30.7	10	58.5	70.0%	Comercial	Sakata	
	Sunbright Supreme									Sakata	
	JG 214 (Omri supreme)	102.4	0.9	10.6	20	12	51	67%	try again	Agridera	Vincent Choice
	Vincent Choice	142.3	1.1	15.4	32	11	57.0	70.0%	Comercial	Sakata	
	Procut Orange	153.6	1.2	14.6	39.1	11	65.3	76.8%	Comercial	Seedseen	
	Full Sun	243.3	2.8	18.9	45.0	11	84.3	83.2%	Comercial	Takii	
	Tavor Joy								Comercial	Agridera	
	Tavor flash	186.3	1.17	12.7	32	10	60.0	43.5%	Comercial	Agridera	
Bicolor	Procut Bicolor	204.3	1.3	16.3	42.0	10	85.8	40.8%	Comercial	Seedseen	
Panache type	Maya Double	88.5	1.4	10.4		11	57.3	86.0%	Comercial	Agridera	
	Tavor double	143.9	1.7	11.4		10	66.5	86.0%	Comercial	Agridera	

Sunflowers Sunrich Family



Sunrich Orange Summer

Sunflowers Sunrich Family



Sunrich Lemon

Sunflowers Sunrich Family



Sunrich Gold

Sunflowers

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Tavor Joy



Long
vase life

Sunflowers



Galilee Adami

Sunflowers

Bali



Tavor Flash

Sunflowers

New
Concepts !



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Double flower
Pannache type

Maya Gold

Sunflowers re- invented



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Coloring the world!

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