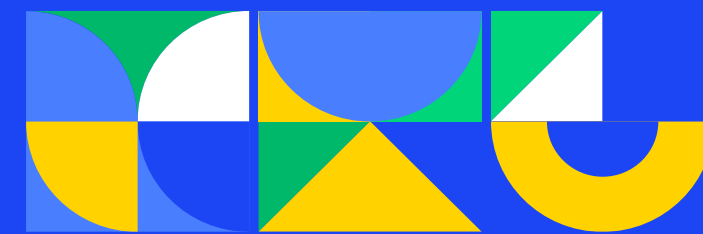


Amazon Food and Beverages: Opportunities and Global Claims



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Introduction



- *From the Amazon to the World*
- *Products compatible with the forest*
- *Dialogue with local companies*

Facts about the region:

- From 2000-2025, 8 million people came to the Amazônia Legal, which today accounts for ~30 million people.
- Around 20% of the Brazilian exports come from States belonging to the region.
- Lots of products compatible with the forest with great export potential.

Assumptions:

The export of high value-added Amazonian products is part of a wealth-generation model that keeps the forest standing.

Product selection

Vol. 1

Brazilian Nuts

- da-Amazônia
- de caju
- de baru

Açaí

- Fruta
- Polpas
- Purês
- Pó
- Sorvetes

Coffee

- Robustas amazônicas

Cocoa and Chocolates

- Cacau (amêndoa)
- Chocolate
- Outras preparações com cacau

Amazon Fishes

- Tambaqui
- Curimatã
- Pacu
- Pirarucu

Vol. 2

Other fruits

- Abacaxi
- Maracujá
- Guaraná e derivados

Natural Honey

- Mel natural
- Derivados da apicultura (própolis, cera de abelha, hidromel)

Spice and seasonings

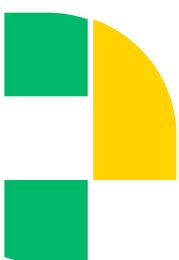
- Pimenta
- Cumaru (Fava Tonka)
- Urucum
- Flor de Jambu

Cassava

- Mandioca
- Tapioca e derivados

Bioinputs

- Gomas, resinas, óleos (p. ex., de Buriti, Tucumã, Andiroba, Patauá, Copaíba, Carnaúba, Babaçu, Pau-rosa, Pracaxi)

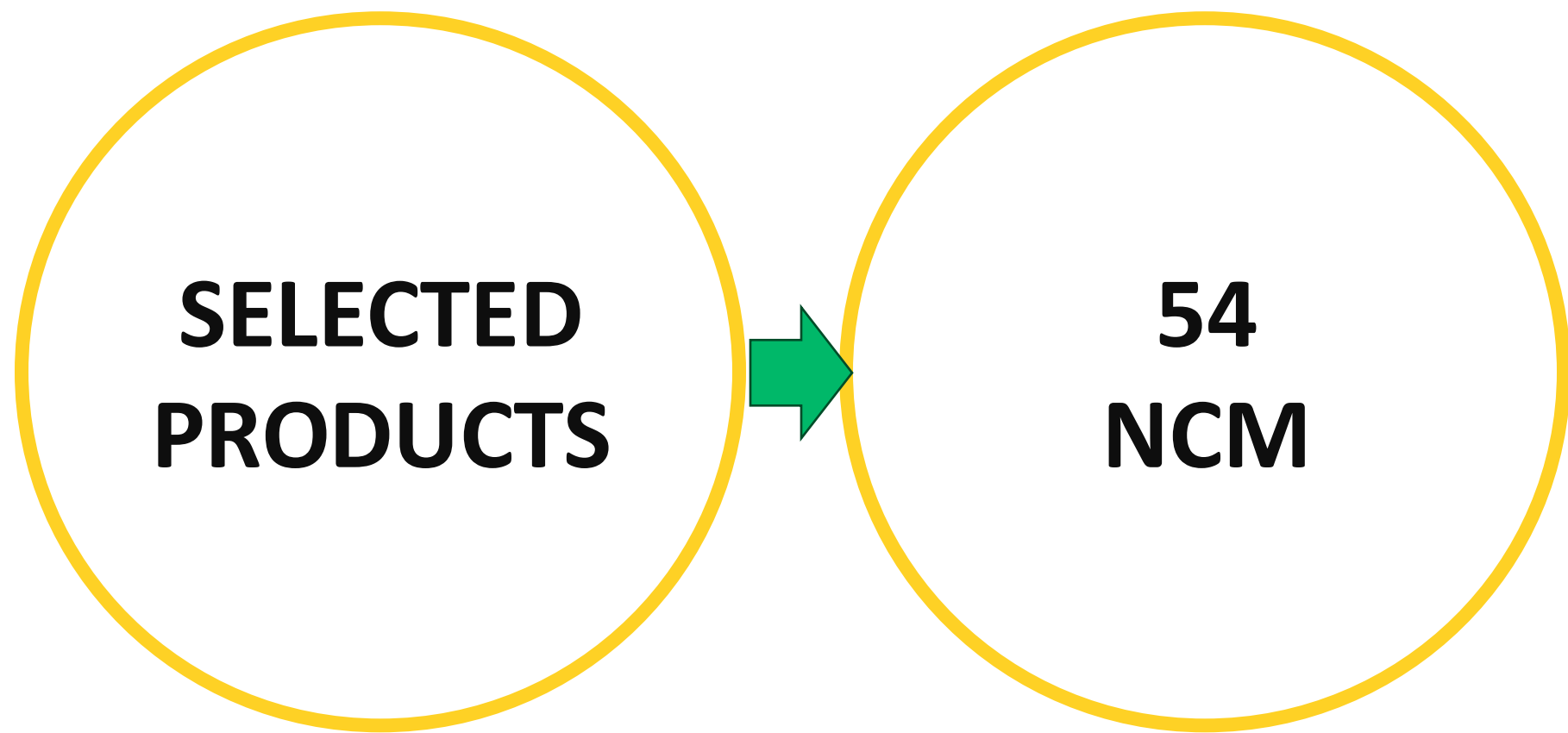


Specialization of the
Legal Amazon Export
Basket

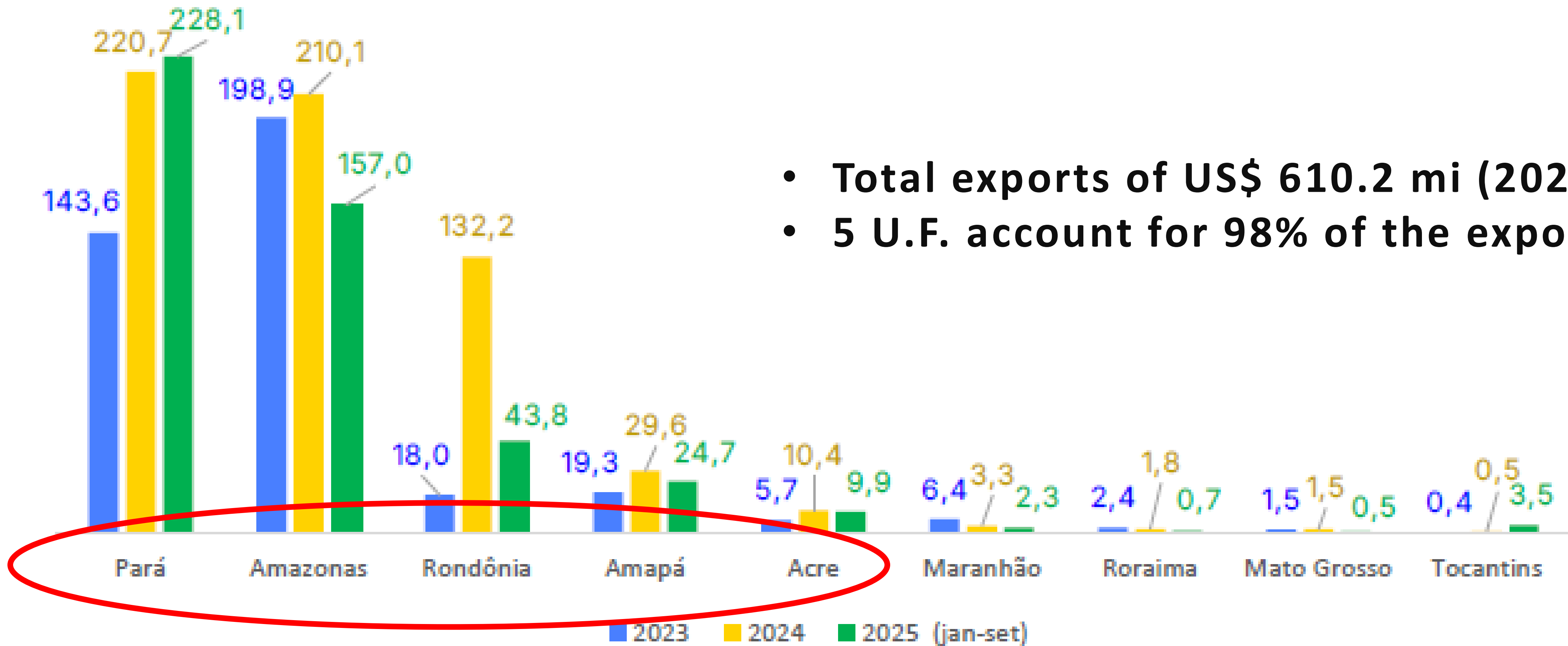
“Non-commodity”
sectors

Opportunities from
the APEXBRASIL
methodology

Methodology



Exports of the selected products by U.F.



- Total exports of US\$ 610.2 mi (2024)
- 5 U.F. account for 98% of the exports

Destination of the selected products

Countries	Export Value of the Legal Amazon (US\$ million)	The Legal Amazon's Share of Brazilian Exports of Selected Products (%)	Growth 23-24 (%)
United States	113.0	5.0	55.1
Bolivia	78.6	77.4	8.9
Venezuela	42.3	83.2	58.3
Vietnam	35.5	22.3	176.1
Germany	34.6	1.9	214.9
Paraguay	28.5	42.9	46.4
Colombia	27.7	21.8	-56.7
Uruguay	20.5	39.5	66.2
India	19.9	24.9	301.2
Australia	19.2	12.1	100.2
Others	190.5	2.4	111.2
Total	610.2	4.7	54.1

- **U.S. (18%); Bolivia (13%); Venezuela (7%); Vietnam (6%); Germany (6%)**

Trade promotion traditional questions:

Is there demand for my Product?
What are the main market access Requirements?
Who buys them?

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Na

- Mel natural
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Cassava

- Mandioca
- Tapioca e derivados

Bioinputs

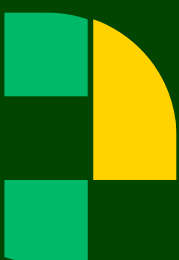
- Gomas, resinas, óleos (p. ex., de Buriti, Tucumã, Andiroba, Patauá, Copaíba, Carnaúba, Babaçu, Pau-rosa, Pracaxi)

Exports of the 5 selected products

	Category	Details	Reason Why	Exports Legal Amazon (2024)
NUTS	Nuts	Castanha-da-Amazônia Castanha de caju Castanha de baru	The Brazil nut tree (from the Amazon), a species native to the Amazon biome, depends on the surrounding forest. Therefore, promoting Brazil nuts contribute to forest conservation and the preservation of traditional ways of life and cultures linked to extractive activities.	US\$ 38.0 million
AÇAÍ	Açaí	Açaí e derivados	Açaí, another native species, contributes to the preservation of floodplain ecosystems and to the capture of carbon from the atmosphere. The NCMs considered for açaí may also include other Amazonian fruits, such as bacuri, cajá/taperebá, and cupuaçu.	US\$ 140.0 million
COFFEE	Coffee	Robusta amazônico	It plays an important role in the regeneration of degraded pastures in the Legal Amazon region (AML) and primarily benefits small-scale family farmers. Agroforestry Systems (AFS) are frequently used, promoting the cultivation of shade-grown coffee among native trees.	US\$ 131.0 million
COCOA	Cocoa and Chocolates	Cacau (amêndoa) Chocolate Outras preparações alimentícias com cacau	Cocoa, a native product of the Amazon, is grown in the region on degraded land (mostly pastures), primarily by smallholder farmers using Agroforestry Systems (AFS). Cocoa is typically grown in the understory, shaded by the forest.	US\$ 471.5 million
FISHES	Amazonian Fish	Tambaqui Curimatã Pacu Pirarucu	In addition to their ecological importance, Amazonian fish are a vital resource for food security, especially in riverside communities.	US\$ 2.6 million

Potential markets for the products

		NUTS	AÇAÍ	COCOA	FISHES
	Oportunidade	Castanha-da- Amazônia (sem casca)	Açaí	Cacau e Chocolates	Peixes amazônicos
Maintenance →	Manutenção	<u>Canadá, Espanha, Peru e EUA</u>	<u>Portugal, China, Uruguai, Austrália, Cabo Verde, EUA e Chile</u>	Chile	Colômbia, Gabão, Peru e Guiné Equatorial
Consolidation →	Consolidação	<u>França e Bélgica</u>	<u>Arábia Saudita, Canadá, Países Baixos, Japão, Austrália e México</u>	<u>Irlanda, Arábia Saudita, Emirados Árabes, Iraque, Equador e Peru</u>	Camarões e Guiné
Opening →	Abertura	<u>Colômbia, Grécia, Romênia e África do Sul</u>	Japão, Reino Unido e Índia	-	-
Recovering →	Recuperação (em declínio)	Reino Unido	<u>Alemanha, EUA, Islandia e Japão</u>	<u>Japão, Luxemburgo, Tailândia e Colômbia</u>	Coreia do Sul,
	Recuperação (em risco)	Emirados Árabes Unidos e China	-	Argentina	-
	Total de imp. pelo conjunto de países do mundo (US\$ milhões)	267,9	18.020,6	1.413,4	3.516,5



Global Claims: What Are They?

Claim = “*appeal*”, allegation, statement





Which Claims Matter?

Euromonitor Methodology

172 Claims in Food and Beverages

✓ “Clean Label”

E.g.: natural, preservative-free, non-GMO

✓ “Nutritional / Health”

E.g.: vegetarian, sugar-free, gluten-free

✓ “Ethical Labels”

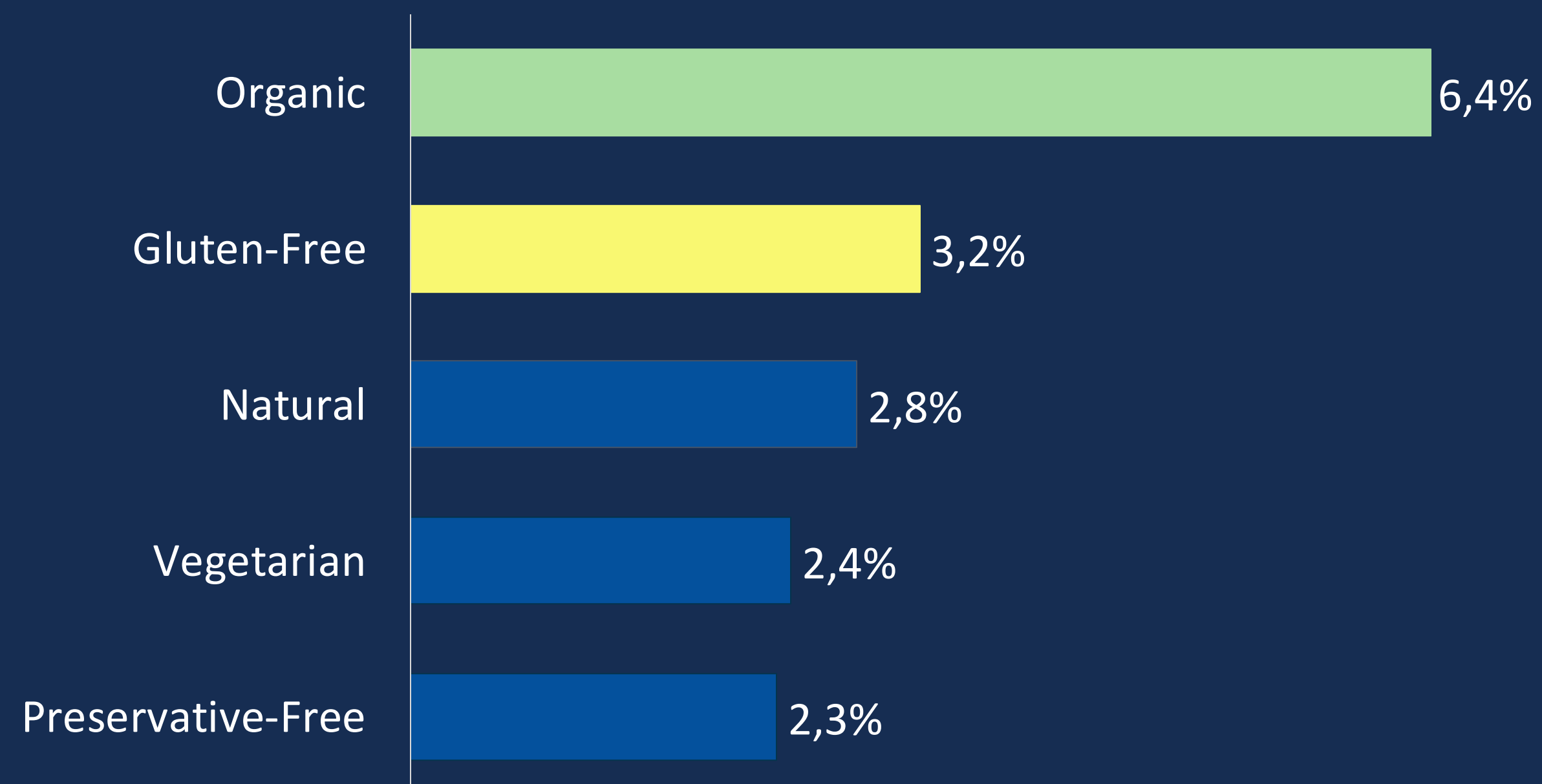
E.g.: organic, fairtrade, recyclable packaging



Which Claims Matter?

Euromonitor Methodology

Highlighted Claims:





How Can Claims Appeals Help Me Export?

Claims by Country:



1º 35.9% Vegetarian

2º 19.9% No Colorants



1º 18.8% Organic

2º 15.6% Preservative-Free

Interviewed Companies



<https://www.facebook.com/dassoleragro>



<https://goolaacai.com/>



<https://www.unifruit.com.br/>



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Interviewed Companies



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<https://www.souflorestaempe.com.br/>



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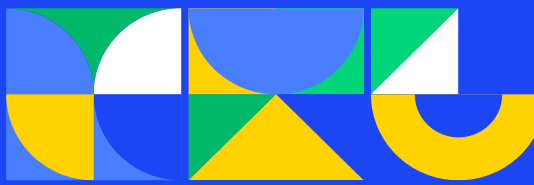
<https://fazendapanorama360.wixsite.com/fazendapanorama>



Take aways:

- The Amazon biodiversity is a pillar for sustainable development in the region, creating employment and preserving the forest.
- Role of public policies are even more relevant for the Region (credit, technical capacity, infrastructure, partnerships ...)!
- Report (v1) focused on 5 products (nuts, açaí, coffee, cocoa, and amazon fishes);
- Potential for diversification beyond the U.S. and the Bolivian markets (e.g. EU, Middle East, Australia and China);
- Claims largely depend on the type of product and the market;
- Important methodology issues when it comes to Amazônia Legal Products classification and export stats.

Thank You



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