

The logo for FIERGS features the acronym 'FIERGS' in a bold, italicized, green sans-serif font. The letters are contained within a white rectangular box that has a series of short horizontal lines on its left and right sides, resembling a stylized bar chart or a data visualization element.

Unidade de Estudos Econômicos

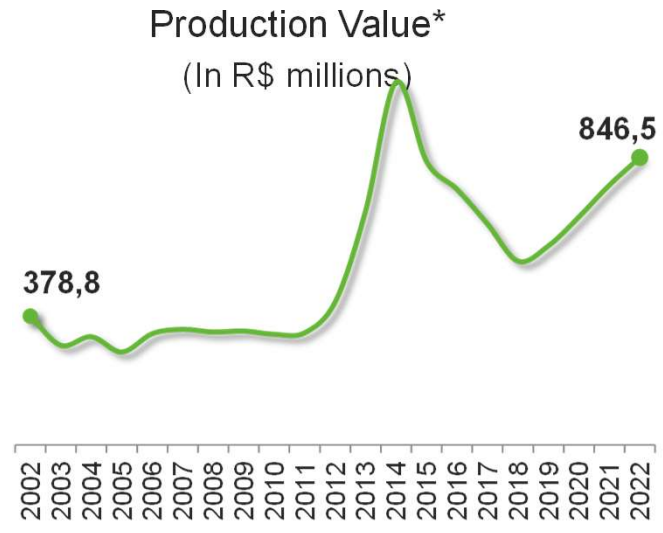
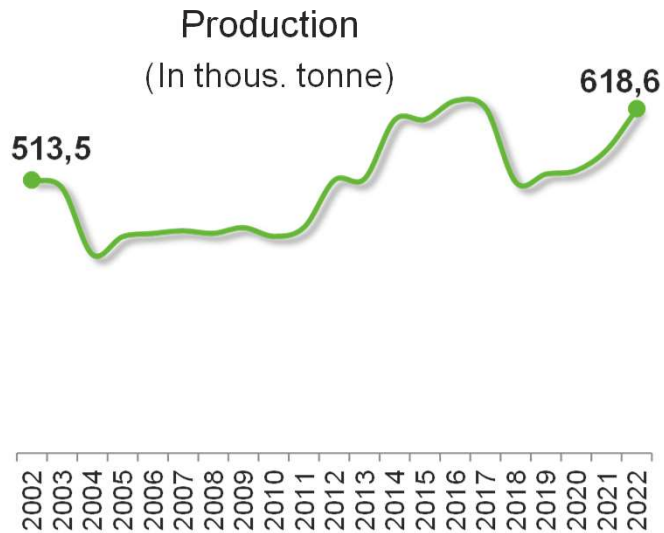
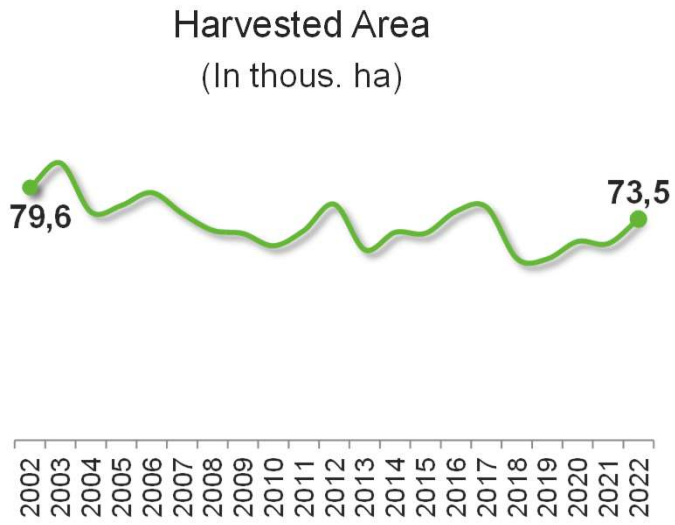
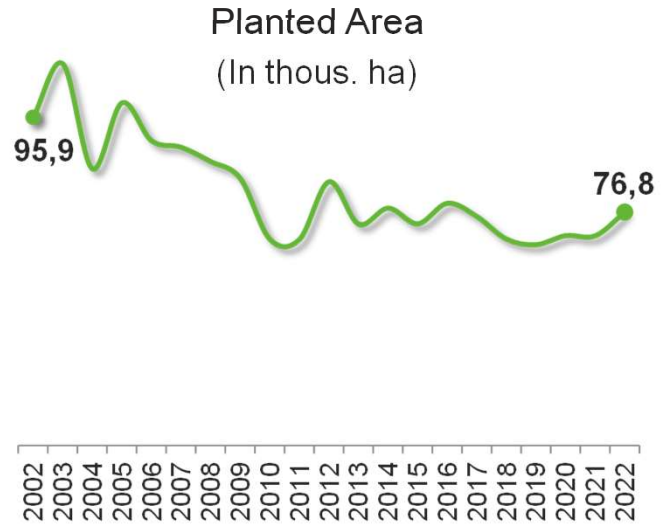
Sindicato da Indústria do Mate do Rio Grande do Sul

SINDIMATE

December, 2023

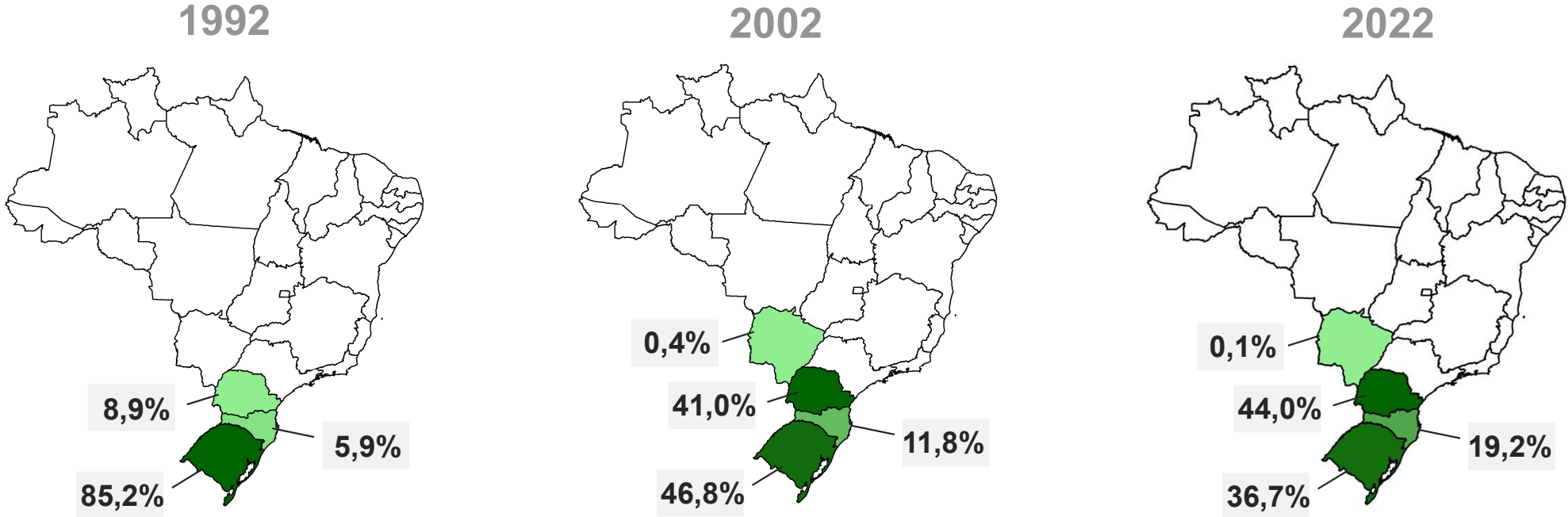
Brazil – Overview

2022	Planted Area (in hectares)	76,843
	Harvested Area (in hectares)	73,458
	Production (in tonne)	618,601
	Production Value (in R\$ thous.)	846,541



source: IBGE – PAM 2022. *In R\$ from 2022. Deflated values by IPCA..

Planted Area

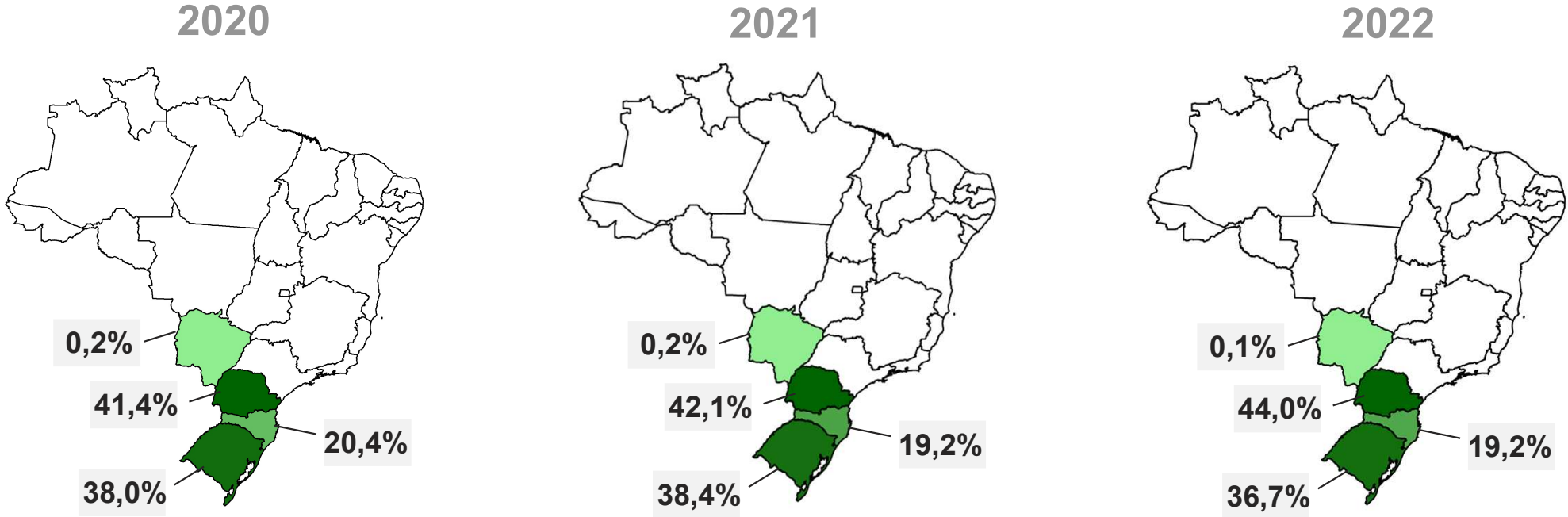


- Currently, 5 states are responsible for all nacional Erva-Mate production.
- In 2022, the state of Amazonas started producing Erva-Mate. With plantation area of 3 ha.
- Although Rio Grande do Sul increased it's plantation area, the state lost participation in the national production during the last two decades.

	1992		2002		2022	
	ha	%	ha	%	ha	%
PR	1.200	8,9	39.260	41,0	33.811	44,0
SC	794	5,9	11.281	11,8	14.736	19,2
RS	11.458	85,2	44.910	46,8	28.190	36,7
MS	2	0,0	421	0,1	103	0,1
AM	-	-	-	-	3	0,0
BR	13.454	100	95.872	100	76.843	100

Source: IBGE – PAM 2022. Note: 1 Hectare = 2.47 Acres.

Planted Area

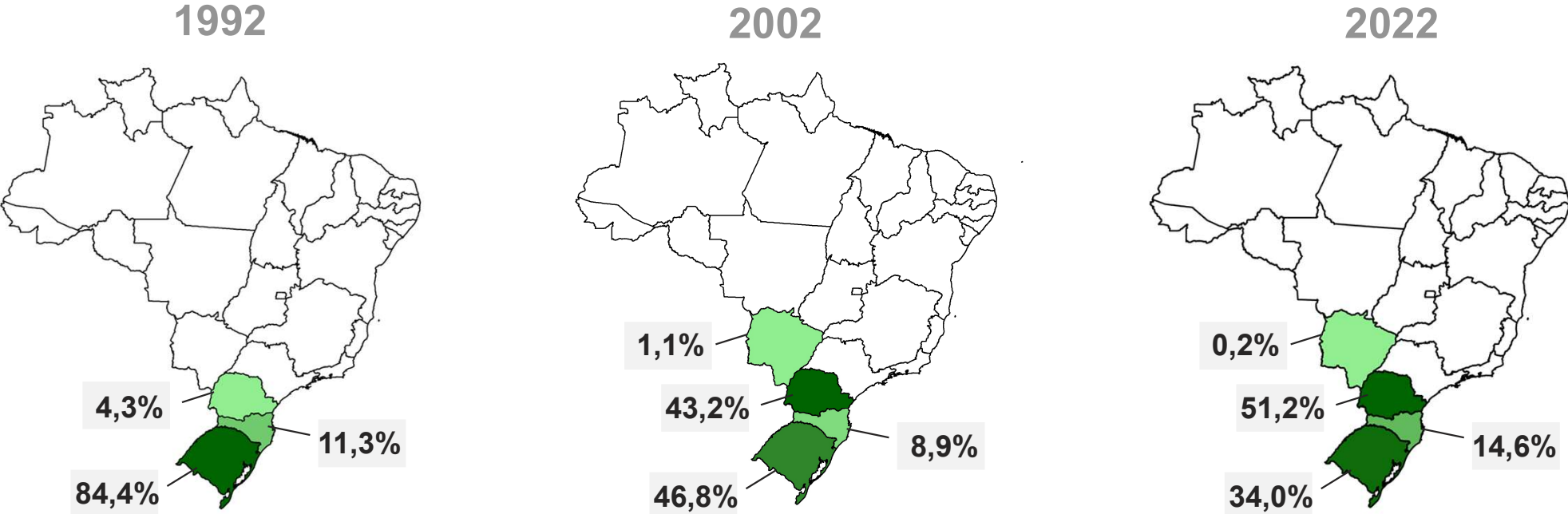


- ❑ Between 2020 and 2022, Rio Grande do Sul has **increased** 777 ha (+2,8%) of plantations.
- ❑ In the period, Paraná had the **biggest growth** in it's planted area: 3,935 ha or **13,2%**.
- ❑ During this period, Brazil had a **growth** of **6.5%** in it's planted area.

	2020		2021		2022	
	ha	%	ha	%	ha	%
PR	29.876	41,4	30.353	42,1	33.811	44,0
SC	14.687	20,4	13.876	19,2	14.736	19,2
RS	27.413	38,0	27.699	38,4	28.190	36,7
MS	146	0,2	163	0,2	103	0,1
AM	-	-	-	-	3	0,0
BR	72.122	100	72.091	100	76.843	100

Source: IBGE – PAM 2022. Note: 1 Hectare = 2.47 Acres.

Production

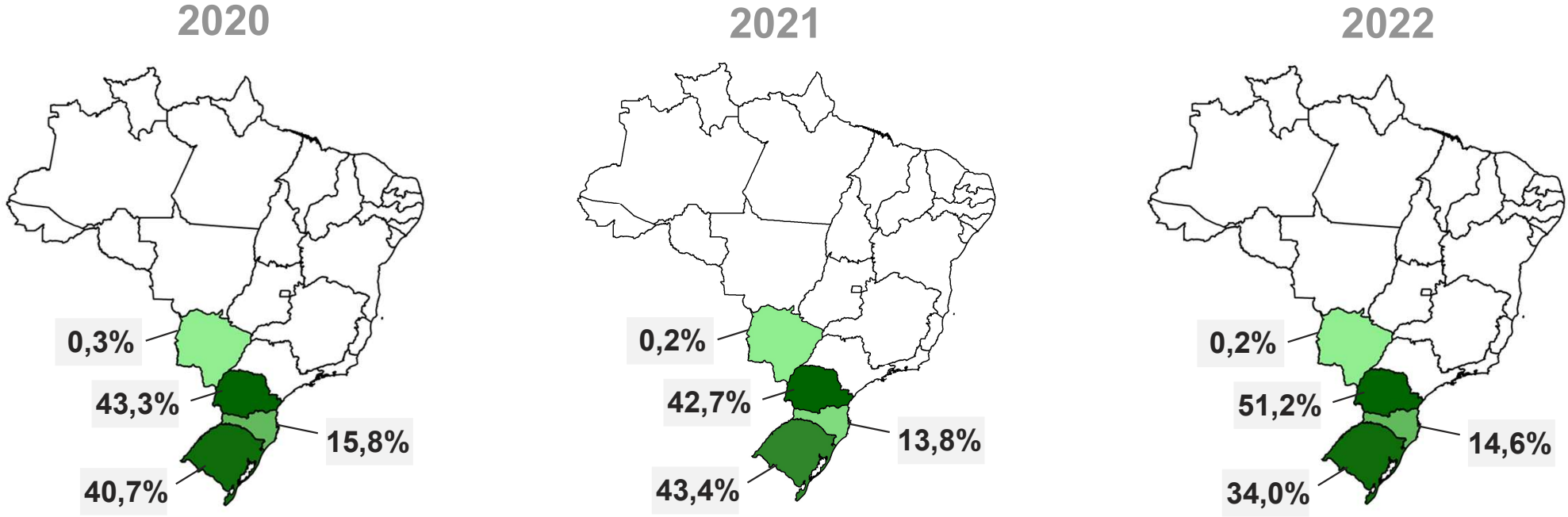


Between 1992 and 2022, Brazil had a **great improvement** in its **production**. The growth is 472,628 t or **323,8%**.

	1992		2002		2022	
	t	%	t	%	t	%
PR	6.222	4,3	221.779	43,2	316.615	51,2
SC	16.516	11,3	45.600	8,9	90.518	14,6
RS	123.230	84,4	240.252	46,8	210.462	34,0
MS	5	0,0	5.895	1,1	1.005	0,2
AM	-	-	-	-	1	0,0
BR	145.973	100	513.526	100	618.601	100

Source: IBGE – PAM 2022.

Production



□ In 2022, **RS** was responsible for **34,0%** of the nacional production. Another highlight is **Paraná** state, producing **51,2%** of Brazil's Erva-Mate.

	2020		2021		2022	
	t	%	t	%	t	%
PR	228.382	43,3	238.050	42,7	316.615	51,2
SC	83.233	15,8	76.763	13,8	90.518	14,6
RS	214.552	40,7	242.018	43,4	210.462	34,0
MS	1.379	0,3	1.096	0,2	1.005	0,2
AM	-	-	-	-	1	0,0
BR	527.546	100	557.927	100	618.601	100

Source: IBGE – PAM 2022.

Productivity

Productivity (Kilogram by Harvested Hectare)

	Brazil	PR	SC	RS	MS
1998	7.390	7.125	5.393	8.383	14.818
1999	7.443	7.125	5.925	8.326	13.909
2000	7.562	7.123	5.691	8.613	13.653
2001	7.687	7.950	4.671	8.257	15.132
2002	6.450	5.648	5.139	7.734	14.002
2003	5.941	4.686	5.098	7.829	14.600
2004	5.391	3.604	3.853	8.135	14.898
2005	5.646	4.262	3.889	8.055	14.229
2006	5.525	4.222	3.615	7.795	13.651
2007	5.883	4.058	3.711	8.537	13.649
2008	6.104	4.182	4.532	8.547	13.737
2009	6.277	4.221	5.722	8.538	13.590
2010	6.311	4.044	5.256	8.900	14.088
2011	6.232	3.846	5.426	8.859	14.091
2012	6.723	4.929	6.423	9.080	14.131
2013	7.648	6.592	5.400	9.447	15.052
2014	8.507	7.951	7.325	9.601	9.031
2015	8.534	7.914	7.075	9.753	5.734
2016	8.414	7.838	6.795	9.704	6.984
2017	8.177	7.140	6.776	9.856	5.407
2018	7.766	6.988	5.766	10.039	7.347
2019	7.961	7.454	5.750	10.007	9.714
2020	7.640	7.644	5.667	8.816	9.445
2021	8.133	7.843	5.553	9.961	8.563
2022	8.421	9.364	6.157	8.473	9.757
(%) 1998-2022	14,0	31,4	14,2	1,1	-34,2

Brazil			
	1998	2022	Var %
Production (t)	424.433	618.601	45,7
Harvested Area (ha)	57.429	73.458	27,9

Rio Grande do Sul			
	1998	2022	Var %
Production (t)	197.361	210.462	6,6
Harvested Area (ha)	23.542	24.840	5,5

Paraná			
	1998	2022	Var %
Production (t)	167.509	316.615	89,0
Harvested Area (ha)	23.507	33.811	43,8

Santa Catarina			
	1998	2022	Var %
Production (t)	53.932	90.518	67,8
Harvested Area (ha)	10.000	14.701	47,0

Mato Grosso do Sul			
	1998	2022	Var %
Production (t)	5.631	1.005	-82,2
Harvested Area (ha)	380	103	-72,9

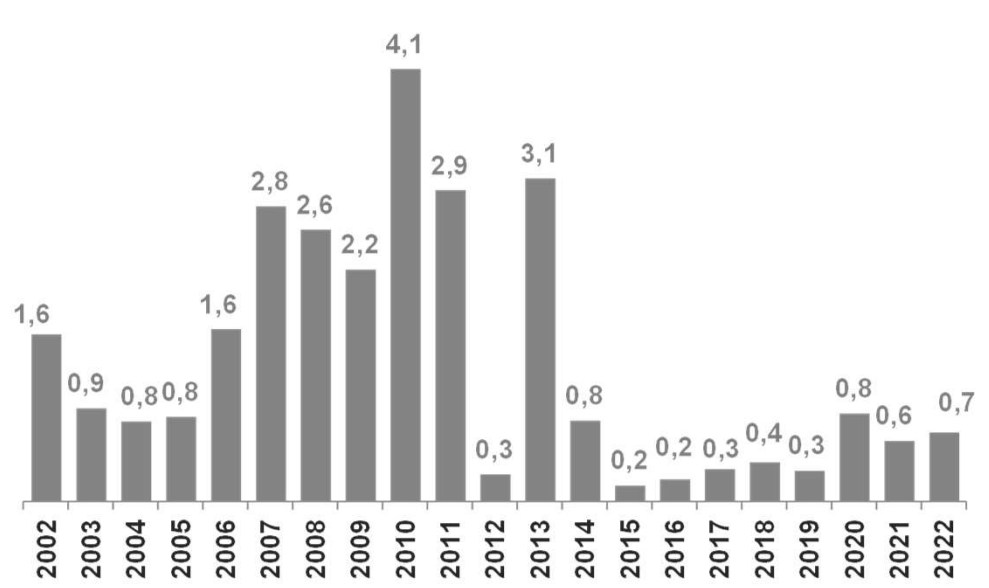
- When production grow slower than harvested area, the productivity drops.

Foreign Trade

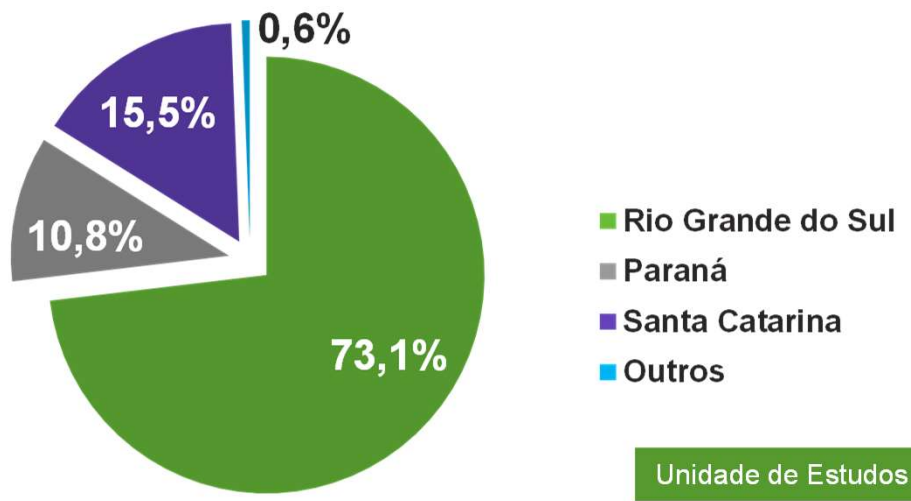
Exports
(in US\$ millions)



Imports
(in US\$ millions)



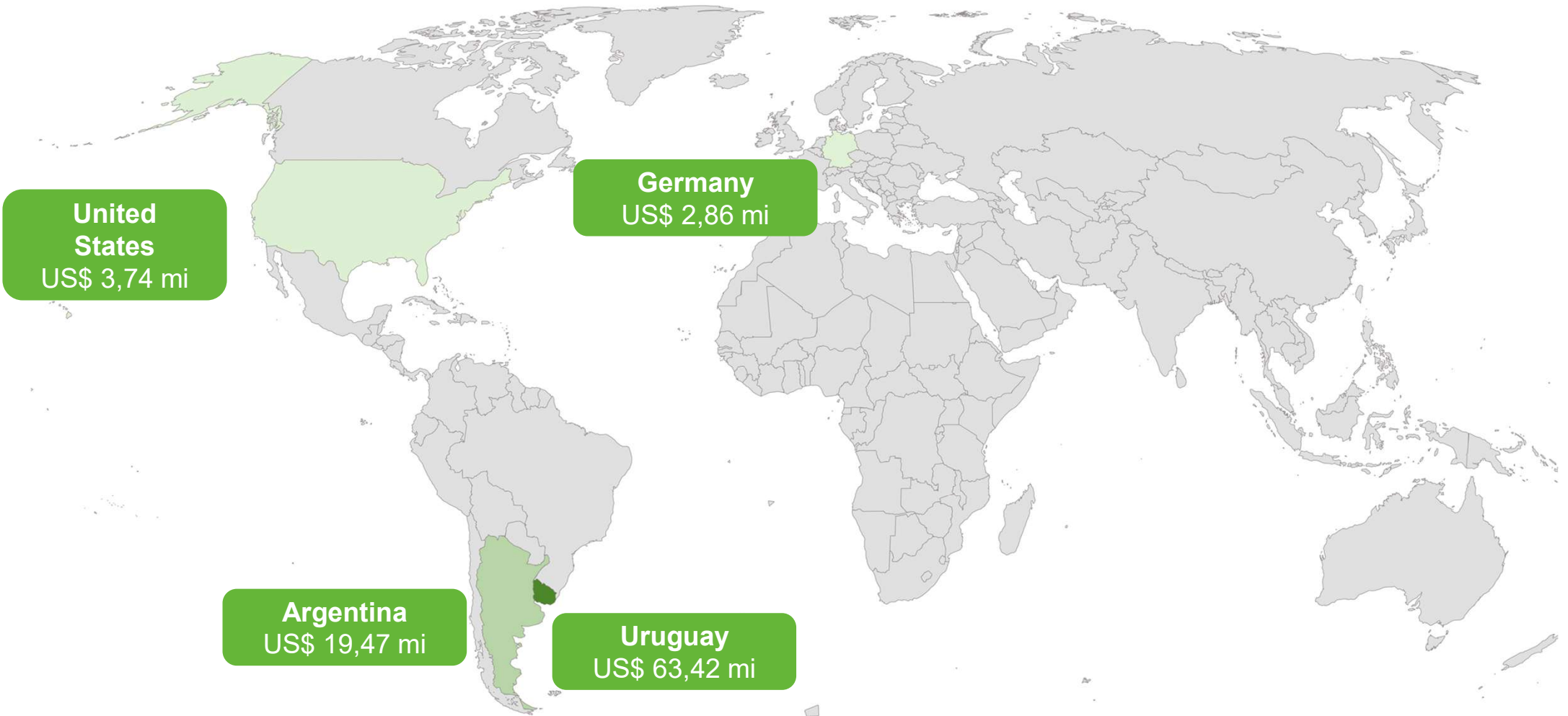
Main Exporting States
(% in 2022)



Source: SECEX/MDIC.

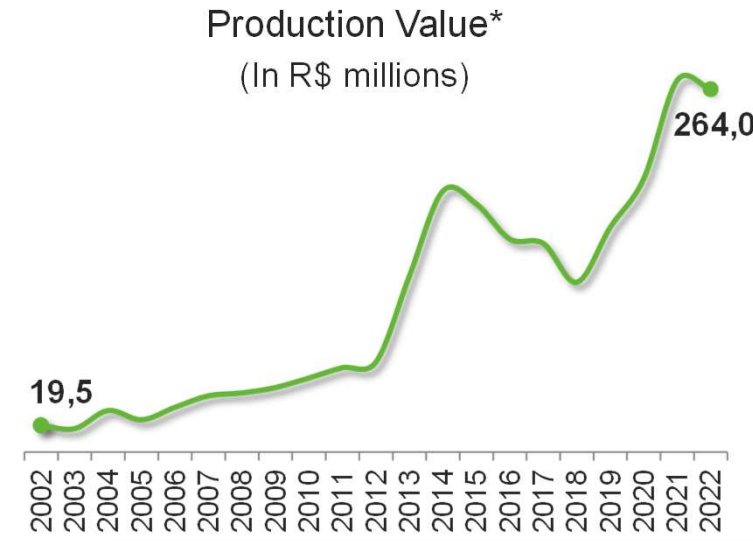
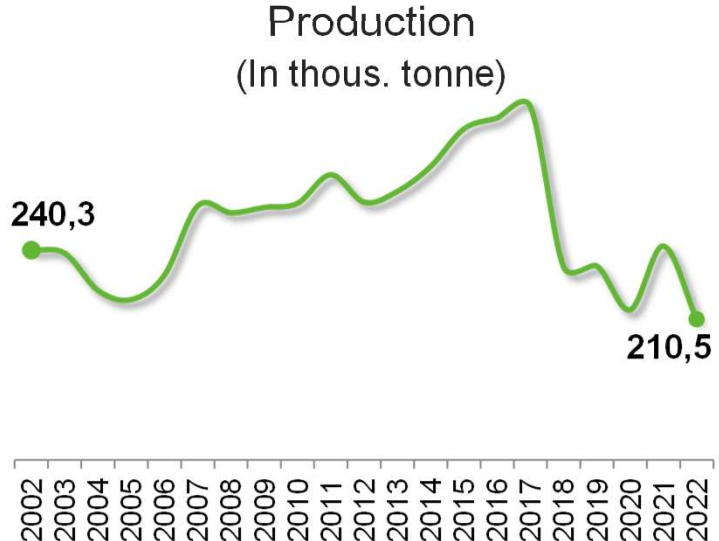
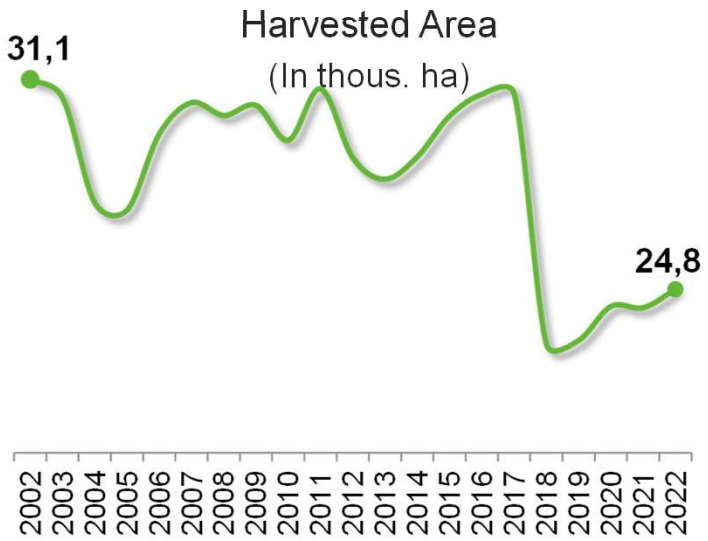
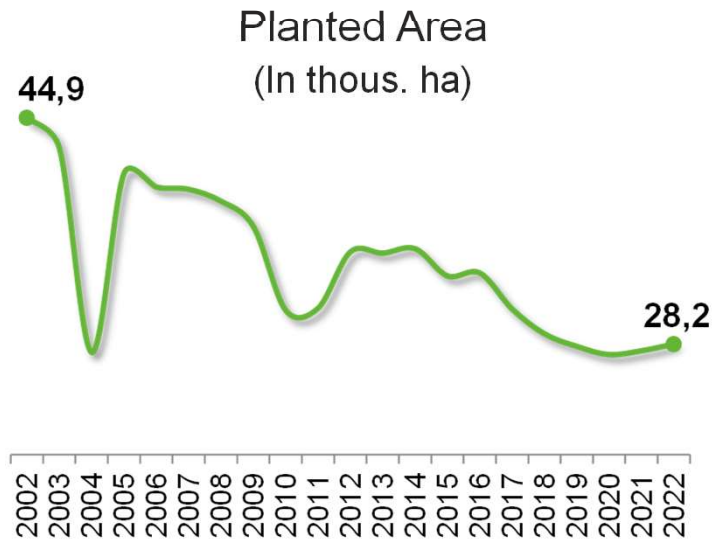
Foreign Trade

Main destinations of Brazil's Erva-Mate exports | 2022



Rio Grande do Sul - Overview

2022	Planted Area (in hectares)	28.190
	Harvested Area (in hectares)	24.840
	Production (in tonne)	210.462
	Production Value (in R\$ thous.)	263.988



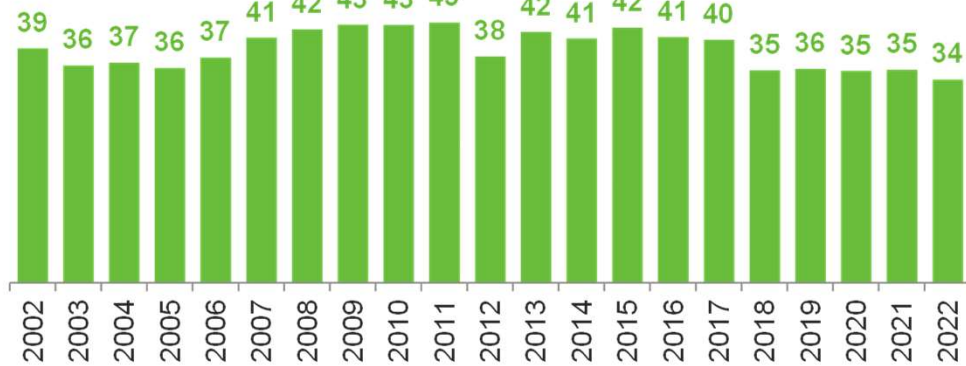
Source: IBGE. *In R\$ from 2022. Deflated values by IPCA.

Participation in Brazil

Planted Area (%)



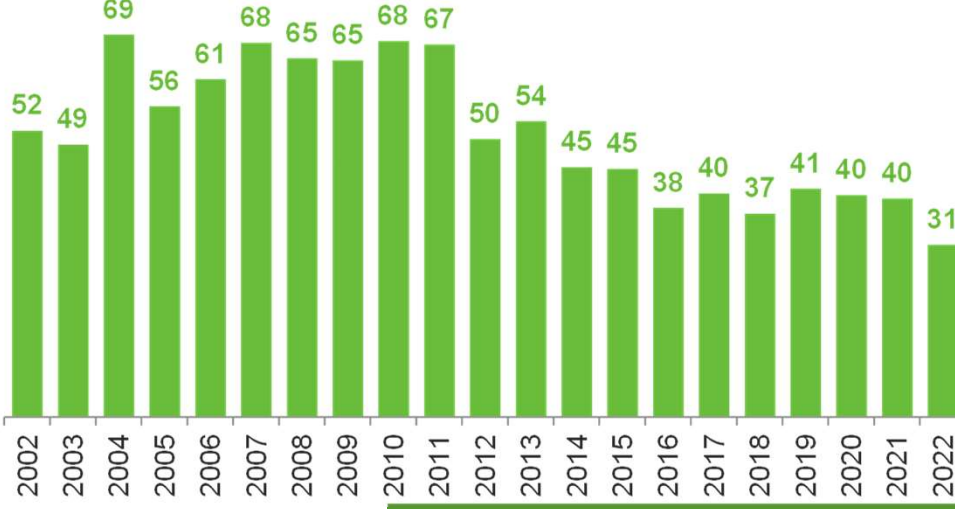
Harvested area (%)



Production (%)



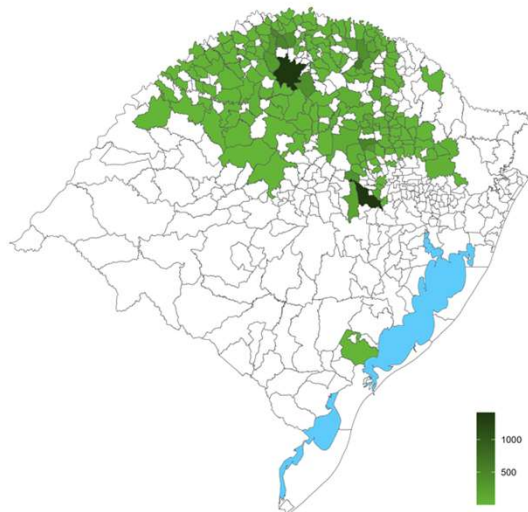
Production value (%)



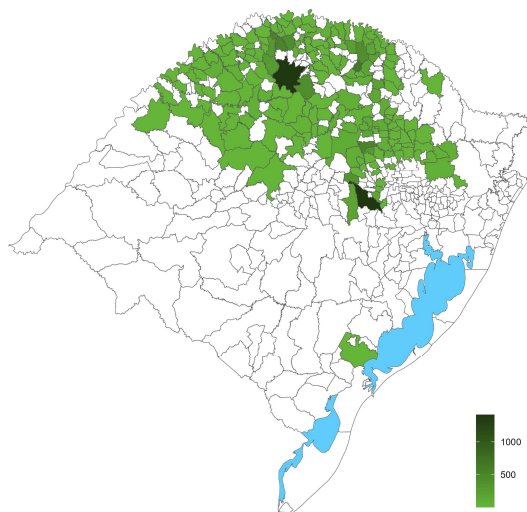
Source: IBGE – PAM 2022.

Municipalities – Planted Area

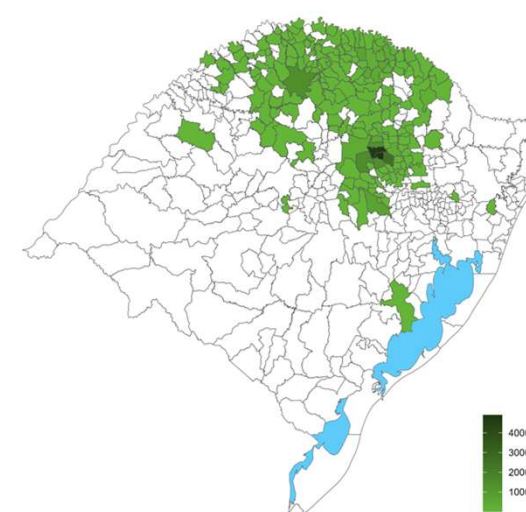
1992



2002



2022



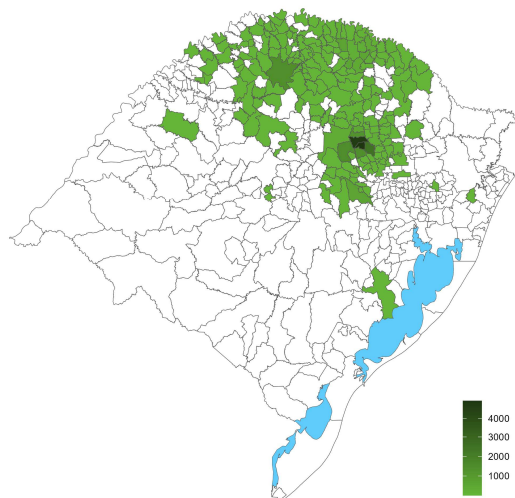
1992		ha	%
1º	Palmeira das Missões	1.413	12,3
2º	Venâncio Aires	1.400	12,2
3º	Erebango	650	5,7
4º	Arvorezinha	500	4,4
5º	Erval Seco	494	4,3
6º	Chapada	400	3,5
7º	Erechim	400	3,5
8º	Seberi	400	3,5
9º	Boqueirão do Leão	350	3,1
10º	Ilópolis	300	2,6
Group Total		6.307	55,0
Other Municipalities		5.151	45,0
Total		11.458	100

2002		ha	%
1º	Ilópolis	7.000	15,6
2º	Arvorezinha	6.000	13,4
3º	Venâncio Aires	4.700	10,5
4º	Palmeira das Missões	1.700	3,8
5º	Fontoura Xavier	1.662	3,7
6º	Itapuca	1.300	2,9
7º	Anta Gorda	1.000	2,2
8º	Áurea	1.000	2,2
9º	Putinga	1.000	2,2
10º	Nova Alvorada	700	1,6
Group Total		26.062	58,0
Other Municipalities		18.848	42,0
Total		44.910	100

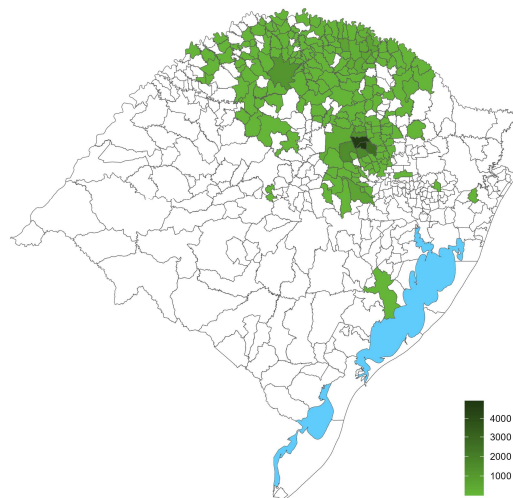
2022		ha	%
1º	Ilópolis	5.200	18,4
2º	Arvorezinha	5.000	17,7
3º	Anta Gorda	2.700	9,6
4º	Putinga	1.600	5,7
5º	Fontoura Xavier	1.470	5,2
6º	Itapuca	1.270	4,5
7º	Palmeira das Missões	1.200	4,3
8º	Áurea	760	2,7
9º	Barão de Cotegipe	626	2,2
10º	Venâncio Aires	600	2,1
Group Total		20.426	72,5
Other Municipalities		7.764	27,5
Total		28.190	100

Municipalities – Planted Area

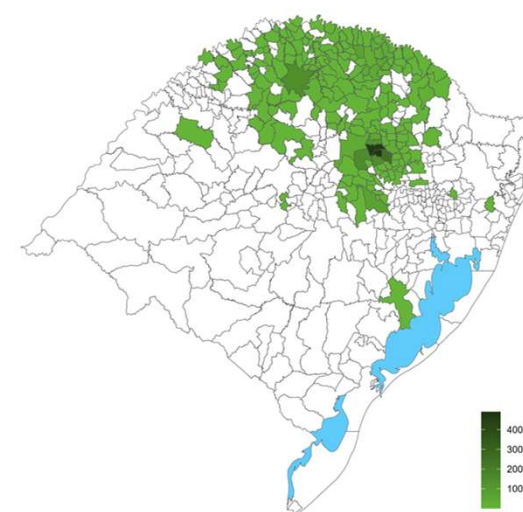
2020



2021



2022



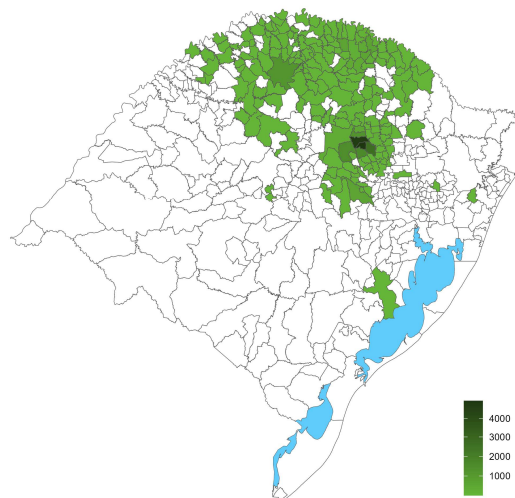
2020		ha	%
1º	Ilópolis	4.900	17,9
2º	Arvorezinha	4.700	17,1
3º	Anta Gorda	2.500	9,1
4º	Fontoura Xavier	1.470	5,4
5º	Palmeira das Missões	1.400	5,1
6º	Putinga	1.400	5,1
7º	Itapuca	1.270	4,6
8º	Venâncio Aires	650	2,4
9º	Barão de Cotegipe	626	2,3
10º	Áurea	550	2,0
Group Total		19.466	71,0
Other Municipalities		7.947	29,0
Total		27.413	100

2021		ha	%
1º	Ilópolis	4.900	17,7
2º	Arvorezinha	4.700	17,0
3º	Anta Gorda	2.600	9,4
4º	Putinga	1.600	5,8
5º	Fontoura Xavier	1.470	5,3
6º	Itapuca	1.270	4,6
7º	Palmeira das Missões	1.200	4,3
8º	Venâncio Aires	650	2,3
9º	Viadutos	650	2,3
10º	Barão de Cotegipe	626	2,3
Group Total		19.666	71,0
Other Municipalities		8.033	29,0
Total		27.699	100

2022		ha	%
1º	Ilópolis	5.200	18,4
2º	Arvorezinha	5.000	17,7
3º	Anta Gorda	2.700	9,6
4º	Putinga	1.600	5,7
5º	Fontoura Xavier	1.470	5,2
6º	Itapuca	1.270	4,5
7º	Palmeira das Missões	1.200	4,3
8º	Áurea	760	2,7
9º	Barão de Cotegipe	626	2,2
10º	Venâncio Aires	600	2,1
Group Total		20.426	72,5
Other Municipalities		7.764	27,5
Total		28.190	100

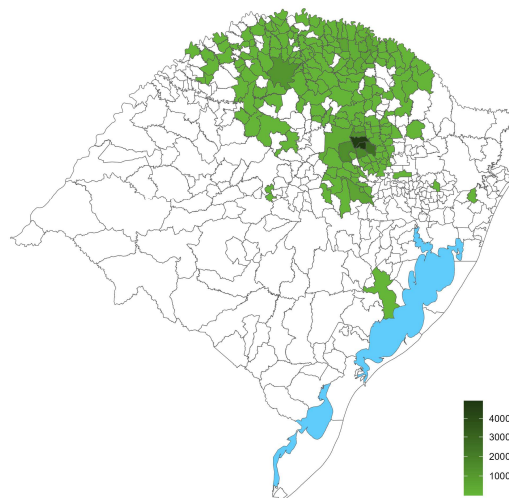
Municipalities - Production

1992



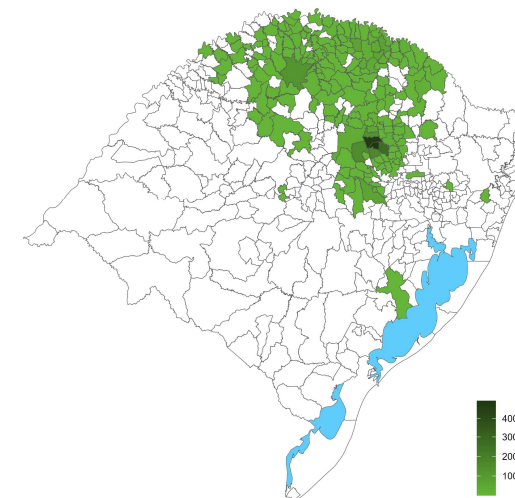
1992		t	%
1º	Venâncio Aires	25.200	20,4
2º	Arvorezinha	9.400	7,6
3º	Erebango	5.850	4,7
4º	Boqueirão do Leão	5.600	4,5
5º	Ilópolis	5.400	4,4
6º	Santa Cruz do Sul	4.320	3,5
7º	Seberi	4.000	3,2
8º	Erechim	3.600	2,9
9º	Palmeira das Missões	3.292	2,7
10º	Cruzeiro do Sul	2.880	2,3
Group Total		69.542	56,4
Other Municipalities		53.688	43,6
Total		123.230	100

2002



2002		t	%
1º	Palmeira das Missões	21.000	8,7
2º	Venâncio Aires	20.790	8,7
3º	Fontoura Xavier	14.688	6,1
4º	Arvorezinha	13.200	5,5
5º	Ilópolis	12.000	5,0
6º	Áurea	9.000	3,7
7º	Erebango	5.586	2,3
8º	Itapuca	5.250	2,2
9º	Erval Seco	4.900	2,0
10º	Nova Prata	4.350	1,8
Group Total		110.764	46,1
Other Municipalities		129.488	53,9
Total		240.252	100

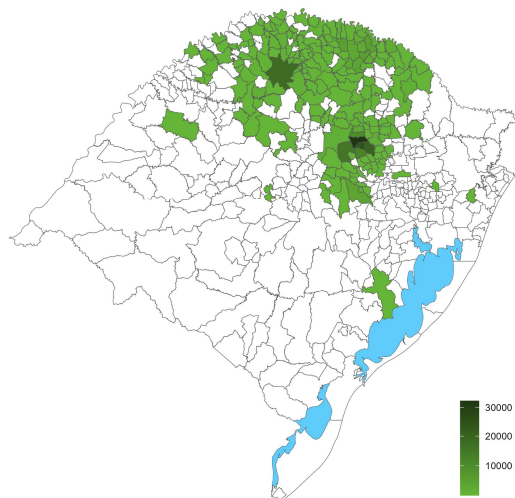
2022



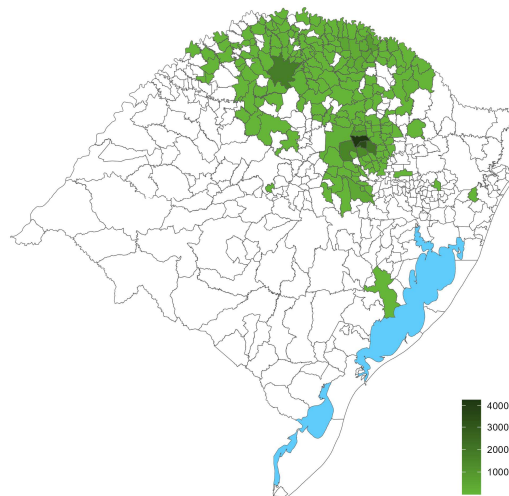
2022		t	%
1º	Arvorezinha	34.500	16,4
2º	Ilópolis	30.400	14,4
3º	Anta Gorda	16.800	8,0
4º	Fontoura Xavier	15.370	7,3
5º	Palmeira das Missões	14.400	6,8
6º	Putinga	10.400	4,9
7º	Itapuca	10.340	4,9
8º	Áurea	6.840	3,2
9º	Viadutos	4.800	2,3
10º	Nova Alvorada	4.200	2,0
Group Total		148.050	70,3
Other Municipalities		62.412	29,7
Total		210.462	100

Municipalities - Production

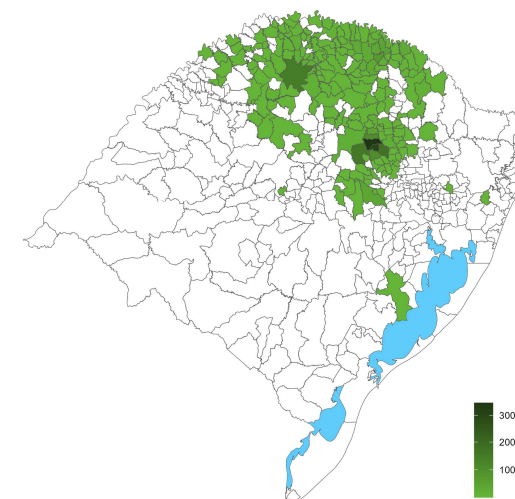
2020



2021



2022



2020		t	%
1º	Arvorezinha	32.250	15,0
2º	Ilópolis	24.500	11,4
3º	Anta Gorda	20.000	9,3
4º	Palmeira das Missões	18.200	8,5
5º	Fontoura Xavier	15.137	7,1
6º	Putinga	11.900	5,5
7º	Itapuca	9.870	4,6
8º	Barão de Cotegipe	5.008	2,3
9º	Áurea	4.950	2,3
10º	Viadutos	4.560	2,1
Group Total		146.375	68,2
Other Municipalities		68.177	31,8
Total		214.552	100

2021		t	%
1º	Arvorezinha	42.570	17,6
2º	Ilópolis	35.000	14,5
3º	Anta Gorda	20.000	8,3
4º	Palmeira das Missões	18.000	7,4
5º	Fontoura Xavier	15.417	6,4
6º	Putinga	13.650	5,6
7º	Itapuca	9.870	4,1
8º	Viadutos	7.800	3,2
9º	Barão de Cotegipe	5.008	2,1
10º	Áurea	4.950	2,0
Group Total		172.265	71,2
Other Municipalities		69.753	28,8
Total		242.018	100

2022		t	%
1º	Arvorezinha	34.500	16,4
2º	Ilópolis	30.400	14,4
3º	Anta Gorda	16.800	8,0
4º	Fontoura Xavier	15.370	7,3
5º	Palmeira das Missões	14.400	6,8
6º	Putinga	10.400	4,9
7º	Itapuca	10.340	4,9
8º	Áurea	6.840	3,2
9º	Viadutos	4.800	2,3
10º	Nova Alvorada	4.200	2,0
Group Total		148.050	70,3
Other Municipalities		62.412	29,7
Total		210.462	100

Permanent Farming

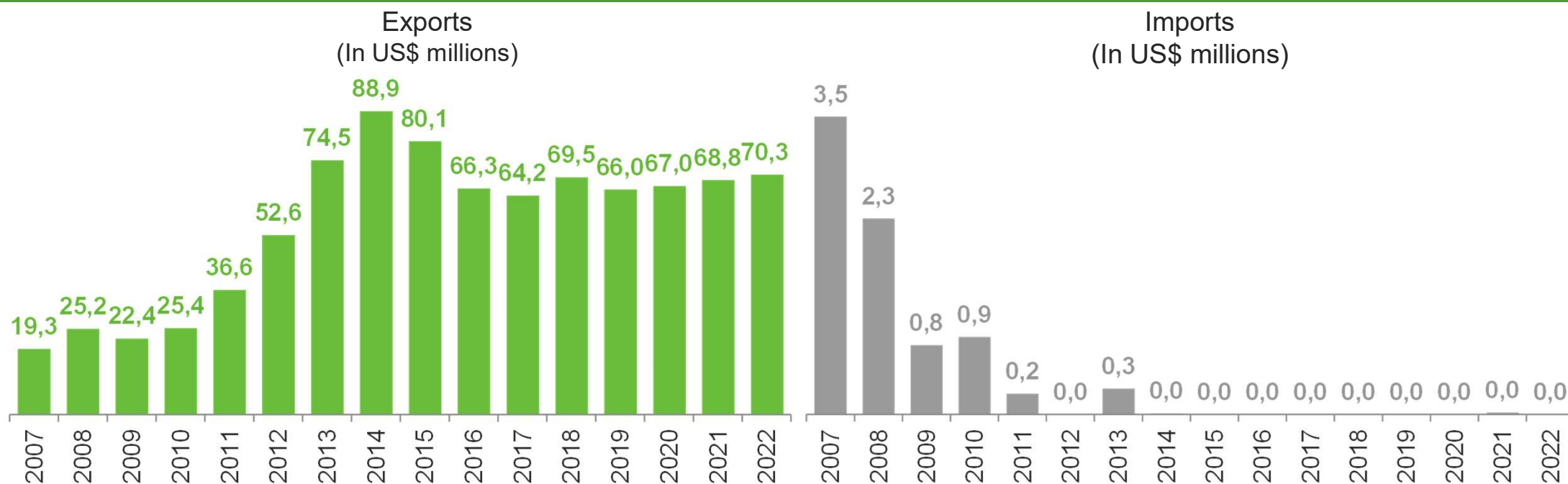
	Planted area (ha)	%
Grape	46.533	28,7
Erva-mate	28.190	17,4
Orange	21.140	13,0
Apple	15.983	9,9
Tangerine	13.230	8,2
Banana	12.159	7,5
Peach	11.495	7,1
Nut	4.267	2,63
Total	162.254	100

	Production (t)	%
Grape	734.982	31,9
Apple	435.312	18,9
Orange	357.259	15,5
Erva-mate	210.462	9,1
Tangerine	189.831	8,2
Banana	137.660	6,0
Peach	137.553	6,0
Persimmon	43.638	1,89
Total	2.303.847	100

	Harvested area (ha)	%
Grape	46.531	29,3
Erva-mate	24.840	15,6
Orange	21.100	13,3
Apple	15.983	10,1
Tangerine	13.225	8,3
Banana	12.157	7,7
Peach	11.494	7,2
Nut	4.251	2,68
Total	158.834	100

	Production value (R\$ thousand)	%
Grape	1.227.459	32,8
Apple	716.313	19,2
Orange	369.360	9,9
Banana	331.577	8,9
Tangerine	306.250	8,2
Erva-mate	263.988	7,1
Peach	245.685	6,6
Persimmon	87.310	2,34
Total	3.739.098	100

Foreign Trade

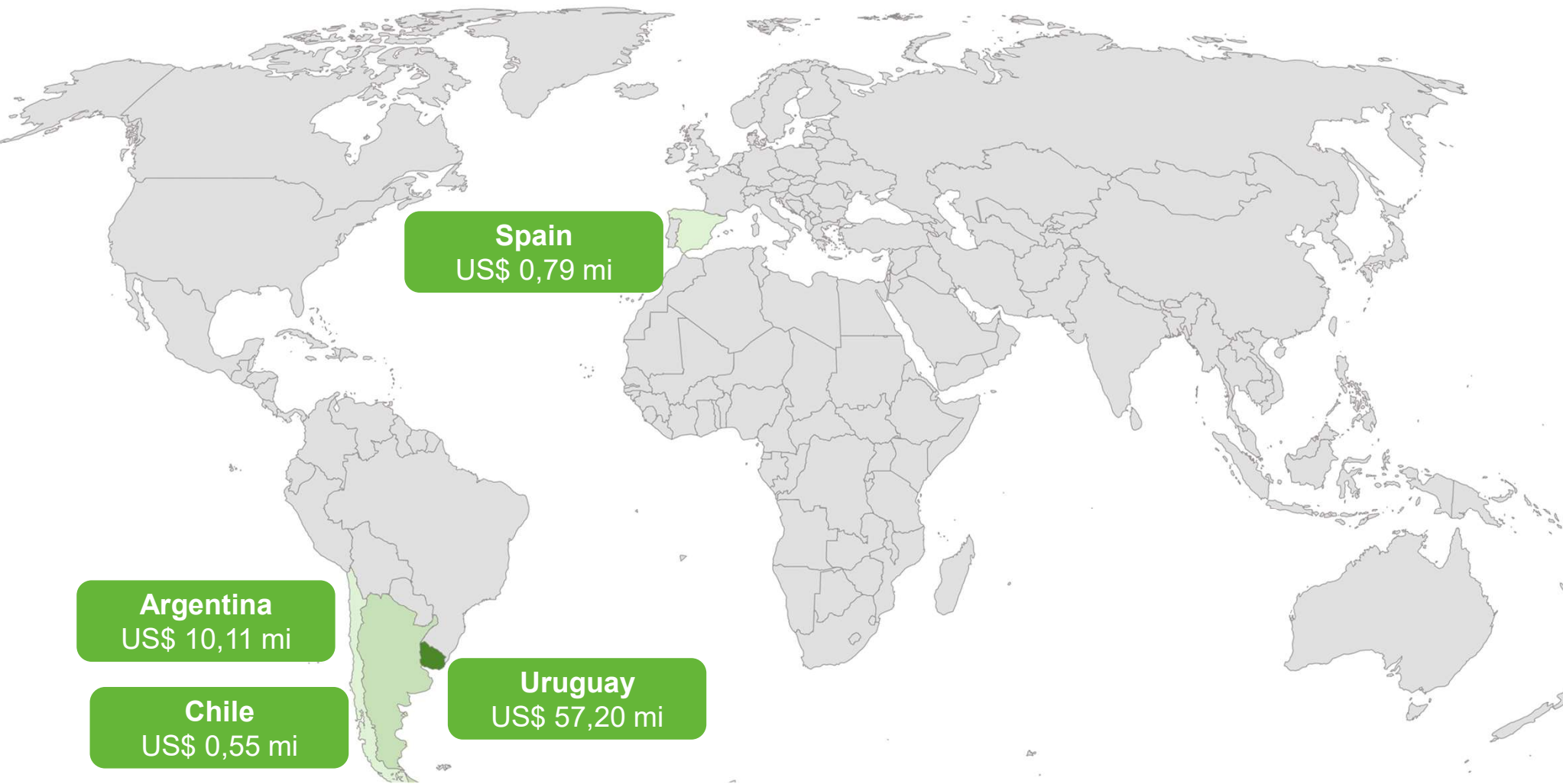


2021		US\$	%
1º	Encantado	49.921.031	71,0
2º	Barão de Cotegipe	6.228.436	8,9
3º	Erechim	2.364.636	3,4
4º	Nova Prata	3.318.074	4,7
5º	Arvorezinha	3.236.142	4,6
6º	Aurea	1.504.339	2,1
7º	Machadinho	1.311.880	1,9
8º	Tuparendi	1.126.074	1,6
Group total		69.010.612	98,1
Other municipalities		2.482.811	3,5
Total		70.328.951	100

Main exporting municipalities (2022)

Foreign Trade

Main destinations of Rio Grande de Sul's Erva-Mate exports | 2022



Source: SECEX/MDIC.

Foreign Trade

Processing Industry Exports 2022 (In US\$ millions)

	jan-dec/22	Part. (%)
Food	5.865	33,6
Chemicals	2.155	12,3
Tobacco	1.707	9,8
Machinery and equipment	1.294	7,4
Pulp and paper	1.257	7,2
Leather and footwear	1.112	6,4
Metal products	1.049	6,0
Vehicles	720	4,1
Rubber and plastics	425	2,4
Wood products	401	2,3
Furniture	375	2,1
Oil derivates	255	1,5
Other manufacturing	219	1,3
Metalurgy	175	1,0
Electrical equipment	167	1,0
Non-metallic minerals	82	0,5
Wearing apparel	68	0,4
Computer equipment and electronics	42	0,2
Textile products	30	0,2
Beverages	28	0,2
Pharmaceuticals	26	0,1
Other transport equipment	9	0,1
Printing and reproduction	3	0,0
Total Processing Industry	17.464	100

In case of **erva-mate** exports (**US\$ 70.3 mi**) were considered a sector of Processing Industry, it would represent the **17°** main exporting sector in 2022, ahead of others relevant segments of Processing Industry, such as Computer equipment and electronics and Textile products.



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