

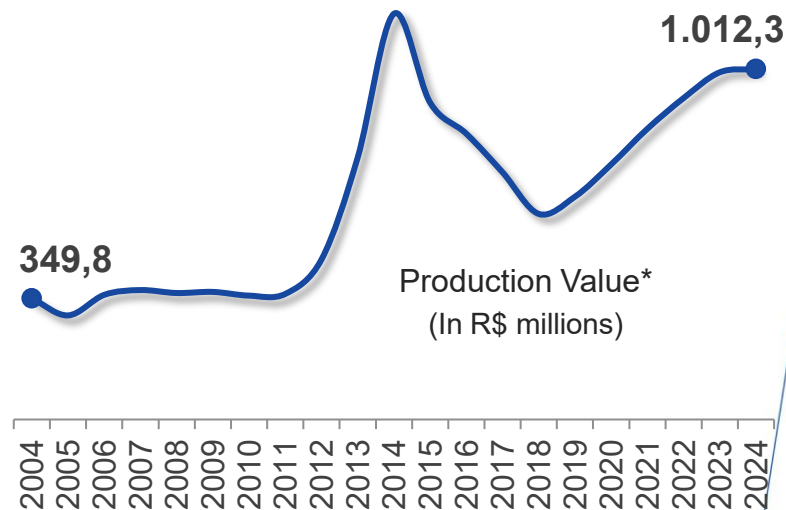
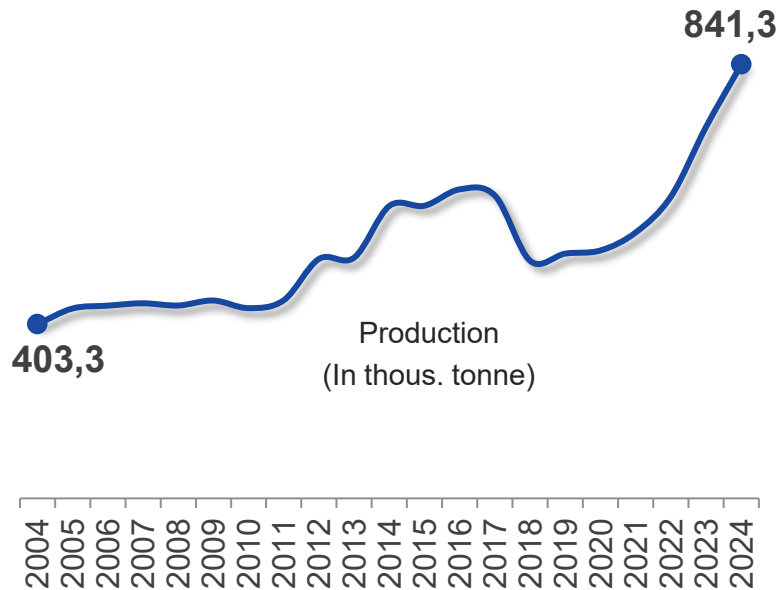
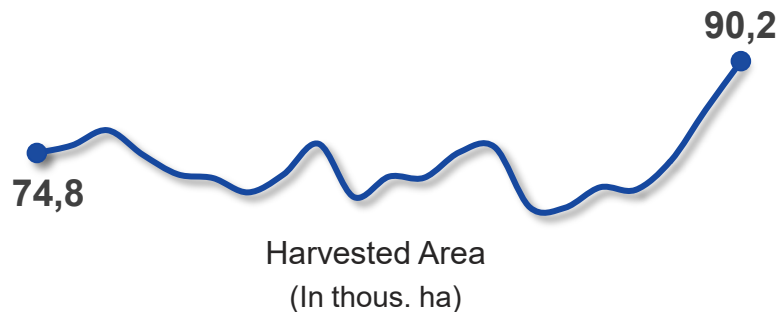
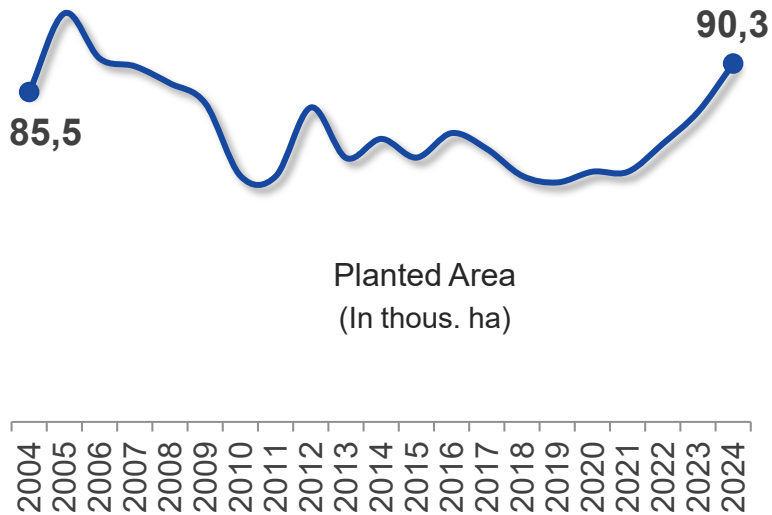
SINDIMATE

Sindicato da Indústria do Mate do Rio Grande do Sul

March, 2026

Brazil – Overview

2024	Planted Area (in hectares)	90.338
	Harvested Area (in hectares)	90.216
	Production (in tonne)	841.255
	Production Value (in R\$ thous.)	1.012.330



2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021 2022 2023 2024

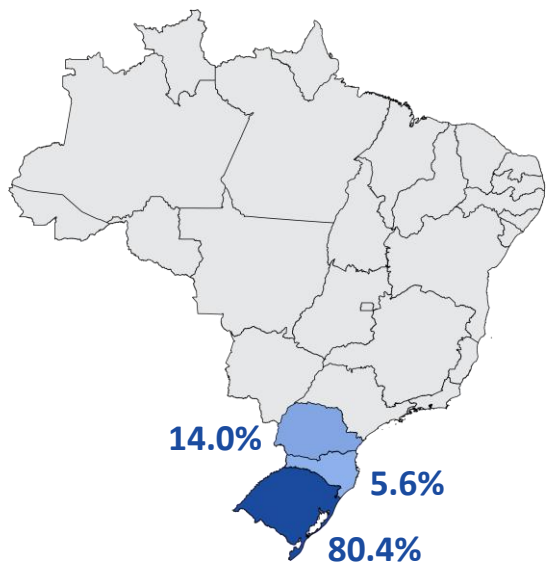
2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021 2022 2023 2024

2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021 2022 2023 2024

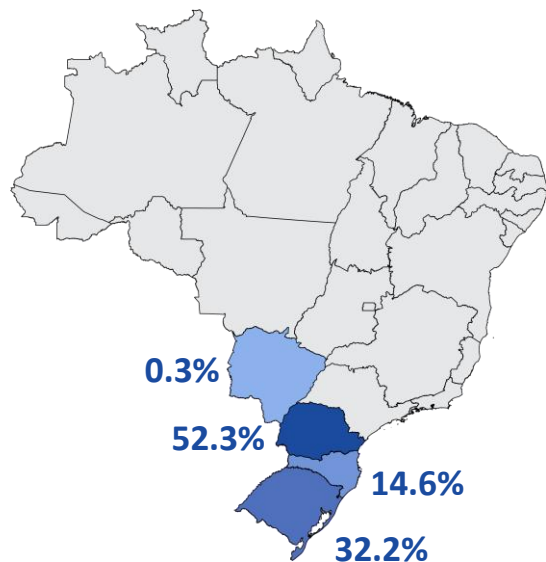
Source: IBGE – PAM 2024. *In R\$ from 2024. Deflated values by IPCA.

Planted Area

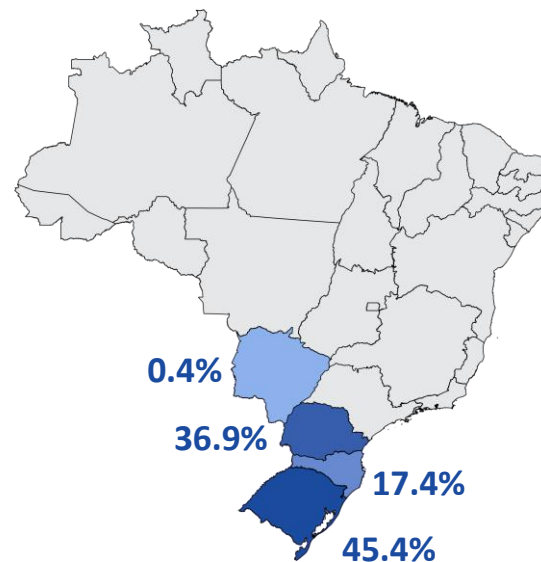
1994



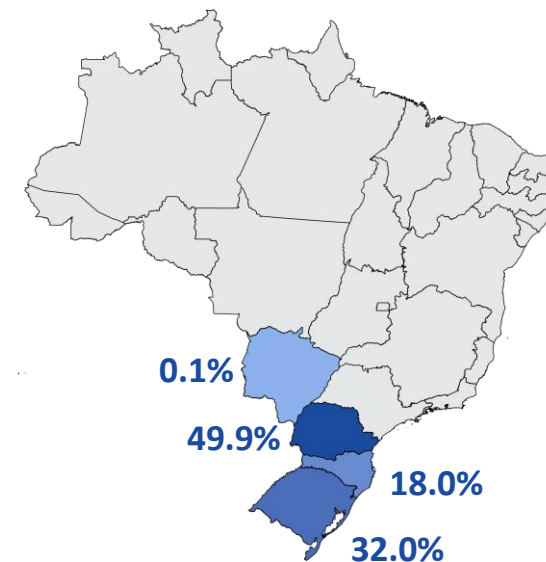
2004



2014



2024



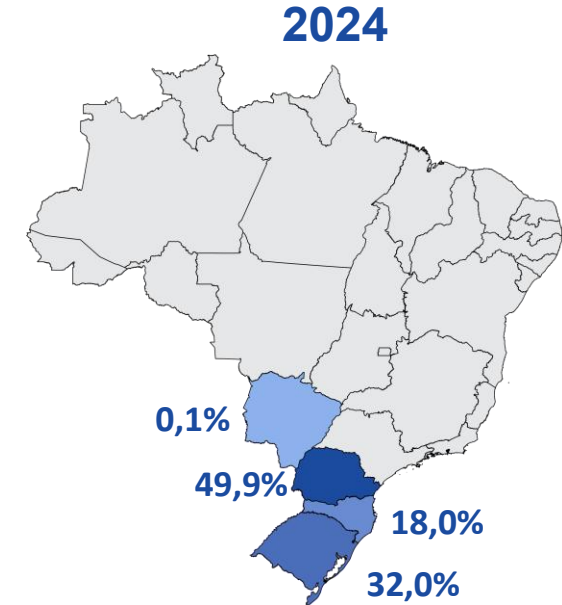
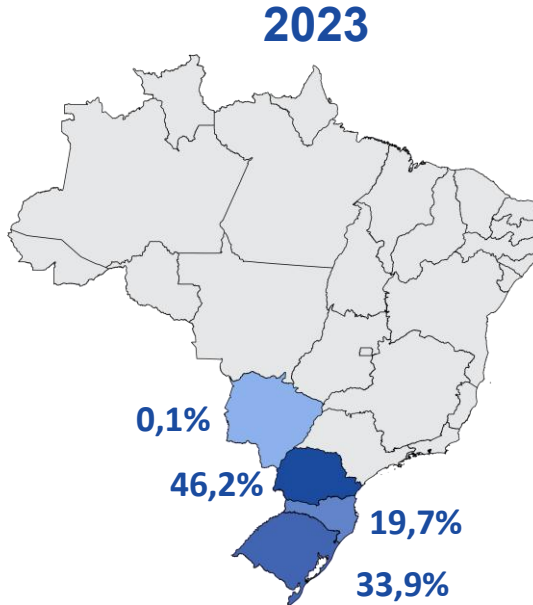
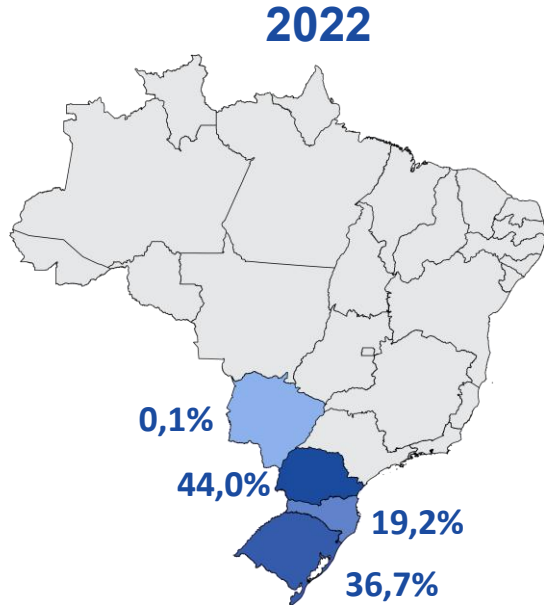
- ❑ The planted area of Erva-mate in Brazil is concentrated in four states, with the three southern states accounting for almost the entire cultivated area (99.9%), while Mato Grosso do Sul contributes only 0.1% of the total area.
- ❑ Paraná has the largest planted area of Erva-mate, representing 49.9% of the total (45,065 ha), followed by Rio Grande do Sul with 32.0% (28,909 ha), and Santa Catarina with 18.0% (16,262 ha).

	1994		2004		2014		2024	
	Hectares	%	Hectares	%	Hectares	%	Hectares	%
PR	3.831	14,0	44.773	52,3	28.629	36,9	45.065	49,9
RS	21.998	80,4	27.579	32,2	35.240	45,4	28.909	32,0
SC	1.524	5,6	12.531	14,6	13.482	17,4	16.262	18,0
MS	0	0,0	654	0,3	294	0,4	102	0,1
MT	5	0,0	0	0,0	0	0,0	0	0,0
BR	27.358	100,0	85.537	100,0	77.645	100,0	90.338	100,0

- ❑ Rio Grande do Sul expanded its cultivated area compared to 2004, but lost 13.4 percentage points in its share of Brazil's total planted area between 2014 and 2024.

Source: IBGE – PAM 2024. Note: 1 Hectare = 2.47 Acres.

Planted Area

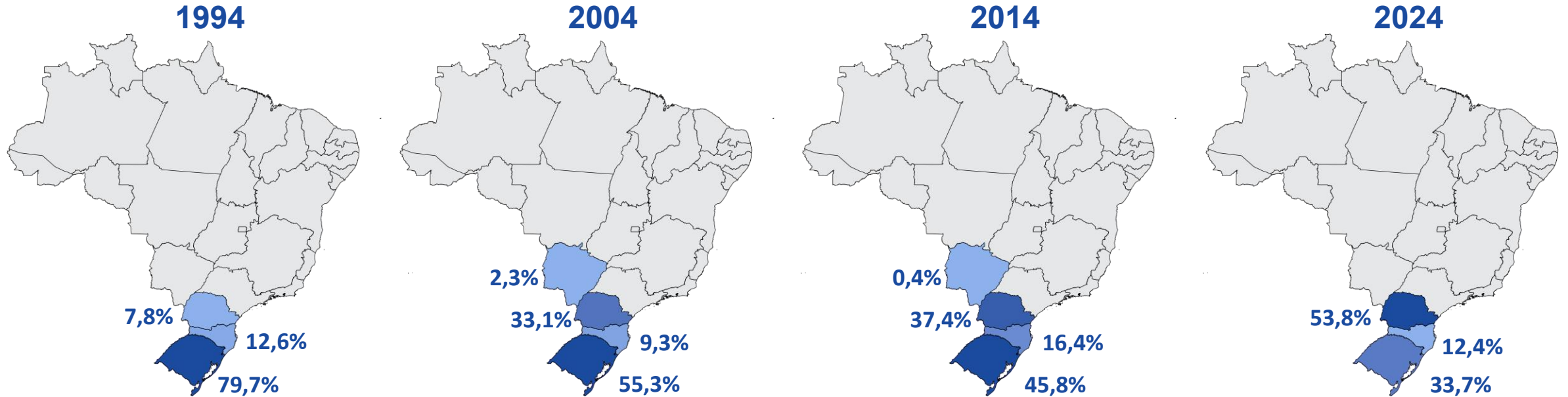


- Over the past three years, Brazil recorded a **17.5% increase** in its cultivated area, from 76,843 ha to 90,338 ha (+13.495 ha).
- Paraná showed the largest growth in planted area over the last three years, increasing by 11,254 ha (+33.3%). Santa Catarina recorded the second largest increase in the period, expanding the cultivated area by 1,526 hectares (+10.4%).

	2022		2023		2024	
	Hectares	%	Hectares	%	Hectares	%
PR	33.811	44,0	37.997	46,2	45.065	49,9
SC	14.736	19,2	16.212	19,7	16.262	18,0
RS	28.190	36,7	27.894	33,9	28.909	32,0
MS	103	0,1	114	0,1	102	0,1
AM	3	0,0	0	0,0	0	0,0
BR	76.843	100,0	82.217	100,0	90.338	100,0

- Between 2022 and 2024, Rio Grande do Sul increased its planted area by 719 ha (+2.6%).

Production



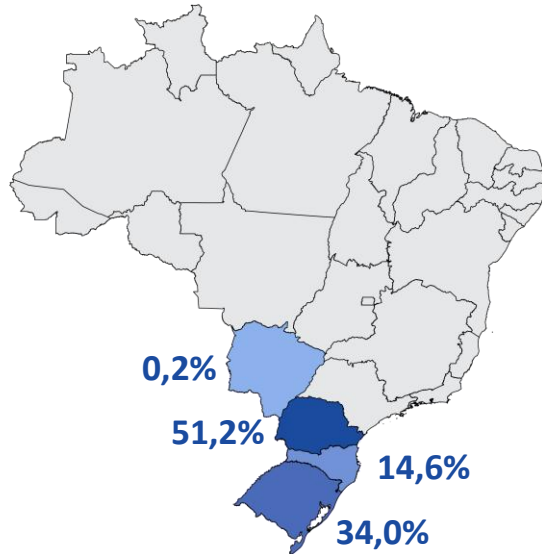
- Erva-mate production in Brazil increased by 618,878 tons over the past 30 years, rising from 222,377 t in 1994 to 841,255 t in 2024, a growth of 278.3%.
- Rio Grande do Sul was the leading producer of Erva-mate in 1994, accounting for 79.7% of national production, but lost share over the years, reaching 33.7% in 2024.
- Paraná surpassed Rio Grande do Sul in 2022 and consolidated its position as Brazil's largest Erva-mate producer. Paraná's production increased from 17,246 tons in 1994 to 452,222 tons in 2024.

	1994		2004		2014		2024	
	tons	%	tons	%	tons	%	tons	%
PR	17.246	7,8	133.449	33,1	225.078	37,4	452.222	53,8
SC	27.930	12,6	37.577	9,3	98.594	16,4	104.621	12,4
RS	177.181	79,7	222.884	55,3	276.232	45,8	283.652	33,7
MS	0	0,0	9.371	2,3	2.655	0,4	760	0,1
BR	222.377	100,0	403.281	100,0	602.559	100,0	841.255	100,0

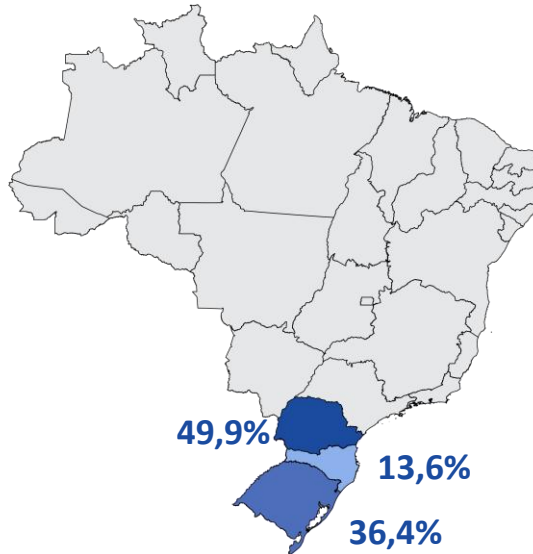
- Mato Grosso do Sul recorded a production peak in 2004 (9,371 tons), but experienced a significant decline over the years, producing 760 tons in 2024.

Production

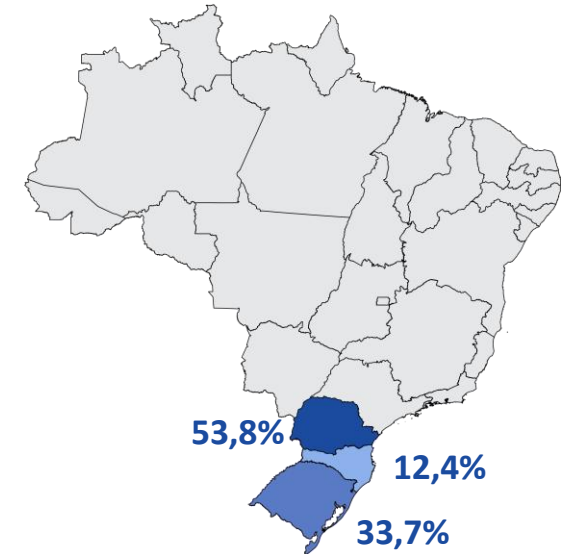
2022



2023



2024



- Between 2022 and 2024, Erva-mate production in Brazil increased by 36.0%, rising from 618,601 t to 841,255 t, driven by the strong expansion in Paraná, which reinforced its leadership as the country's main producer.
- Rio Grande do Sul increased its production from 210,462 t in 2022 to 283,652 t in 2024, a growth of 34.8%. However, it lost share in the national total, declining from 34.0% to 33.7%, while Paraná expanded its leadership in Brazilian Erva-mate production

	2022		2023		2024	
	tons	%	tons	%	tons	%
PR	316.615	51,2	367.281	49,9	452.222	53,8
RS	210.462	34,0	268.242	36,4	283.652	33,7
SC	90.518	14,6	100.024	13,6	104.621	12,4
MS	1.005	0,2	646	0,1	760	0,1
AM	1	0,0	0	0,0	0	0,0
BR	618.601	100,0	736.193	100,0	841.255	100,0

- The state of Paraná recorded the largest absolute increase in the period, rising by 135,607 t between 2022 and 2024 (+42.8%), reaching 452,222 t and accounting for 53.8% of national production in 2024. Santa Catarina also recorded growth, increasing from 90,518 t to 104,621 t (+14.103 t | +15.6%).

Source: IBGE – PAM 2024.

Productivity

Productivity
(Kilogram by Harvested Hectare)

	Brazil	PR	SC	RS	MS
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
2023	8.967	9.692	6.172	9.620	5.667
2024	9.325	10.035	6.433	9.853	7.451
1999 - 2024 (%)	25,3	40,8	8,6	18,3	-46,4

Brazil			
	1999	2024	Var %
Production (t)	462.665	841.255	81,8
Harvested Area (ha)	62.154	90.216	45,1

Rio Grande do Sul			
	1999	2024	Var %
Production (t)	218.183	283.652	30,0
Harvested Area (ha)	26.205	28.787	9,9

Paraná			
	1999	2024	Var %
Production (t)	167.509	452.222	170,0
Harvested area (ha)	23.507	45.065	91,7

Santa Catarina			
	1999	2024	Var %
Production (t)	71.312	104.621	46,7
Harvested Area (ha)	12.035	16.262	35,1

Mato Grosso do Sul			
	1999	2024	Var %
Production (t)	5.661	760	-86,6
Harvested Area (ha)	407	102	-74,9

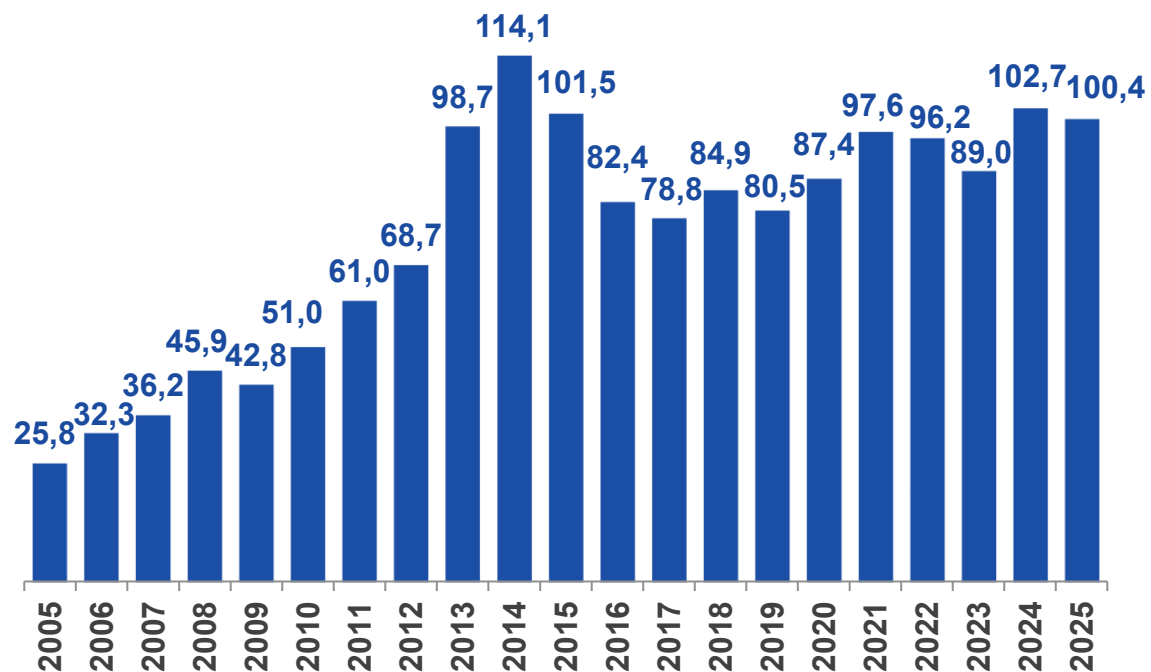
□ The state of **Rio Grande do Sul** recorded an 18.3% increase in average yield between 1999 and 2024. During this period, production increased from 218,183 t to 283,652 t (+30.0%), while the harvested area expanded from 26,205 ha to 28,787 ha (+9.9%).

□ The state of **Paraná** led the growth in productivity over the period. Production rose from 167,509 t in 1999 to 452,222 t in 2024 (+170.0%), accompanied by a strong expansion in harvested area, which increased from 23,507 ha to 45,065 ha (+91.7%). The average yield increased by 40.8% over the period.

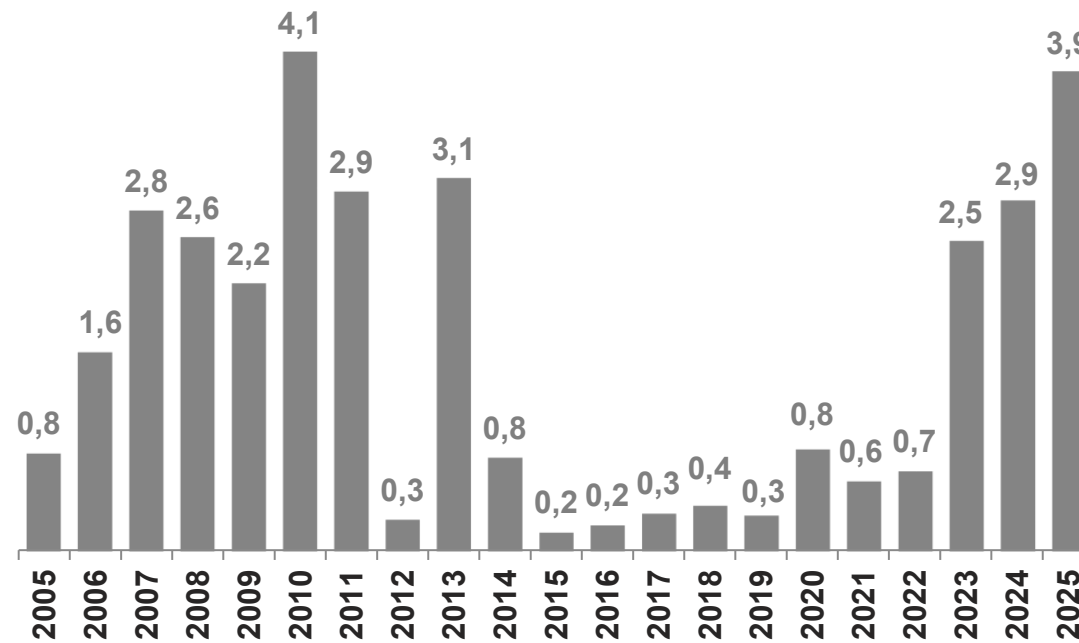
□ The state of **Santa Catarina** recorded a moderate increase in average yield, rising by 8.6% between 1999 and 2024. During this period, production increased from 71,312 t to 104,621 t (+46.7%), while the harvested area expanded from 12,035 ha to 16,262 ha (+35.1%).

Brazil Foreign Trade

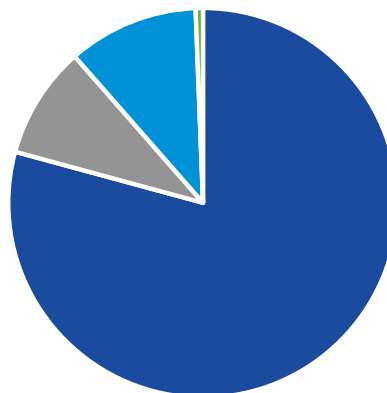
Exports
(in US\$ millions)



Imports
(in US\$ millions)



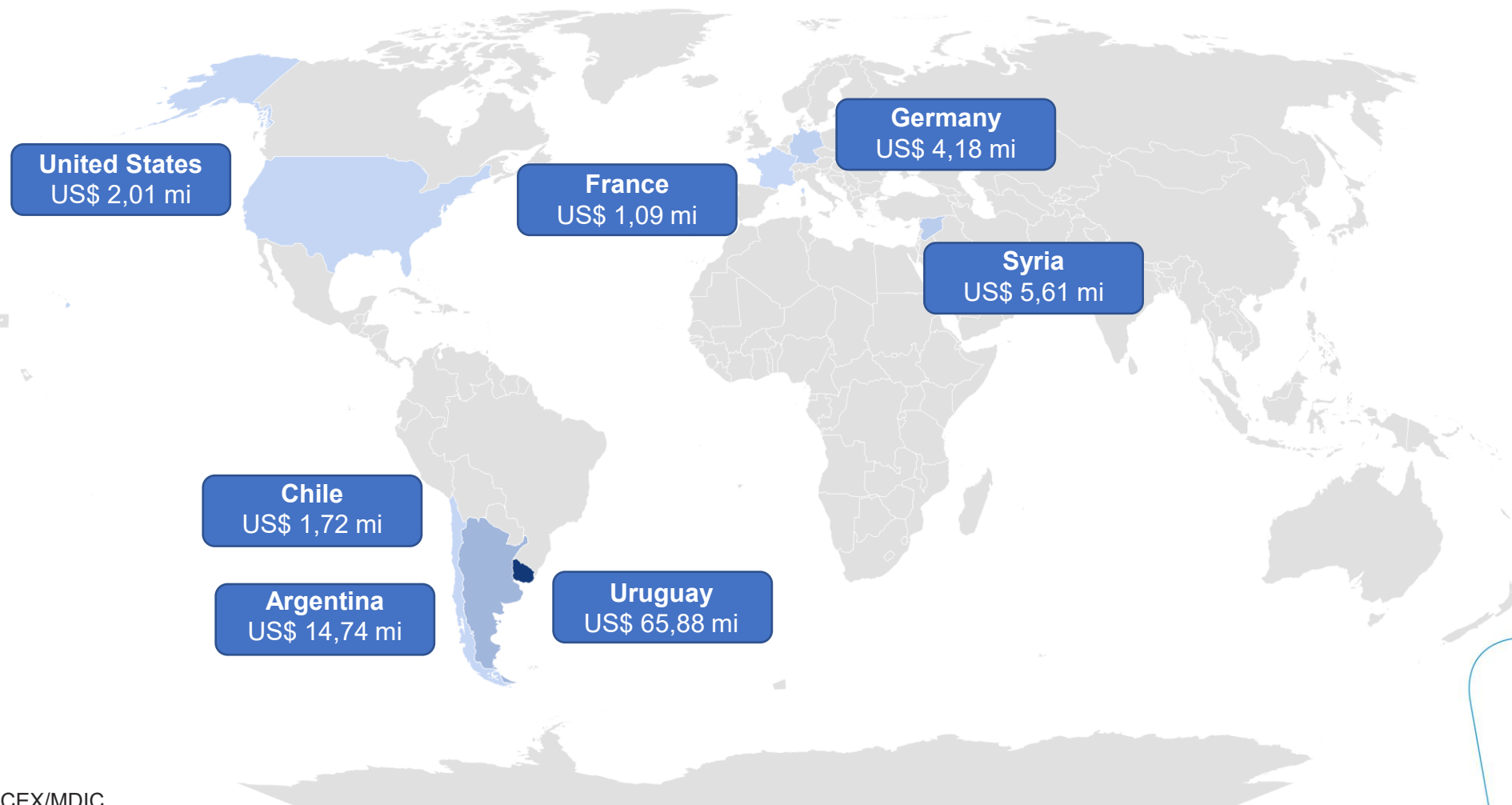
Main Exporting States
(% in 2025)



- Rio Grande do Sul
- Paraná
- Santa Catarina
- Outros

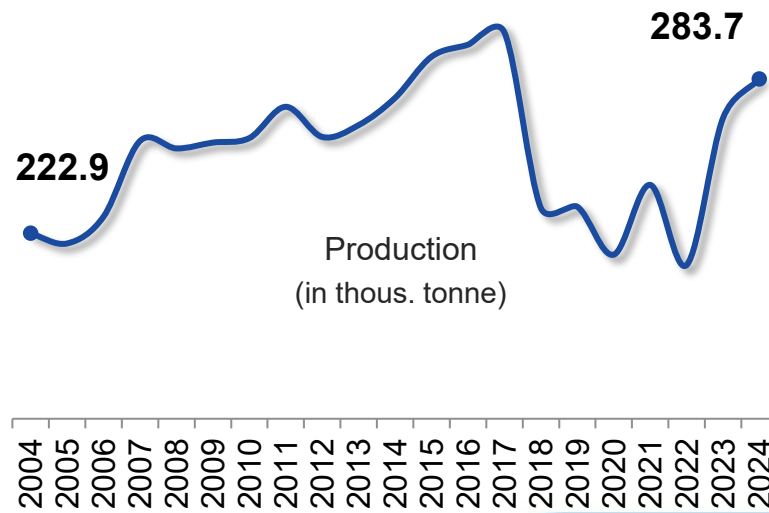
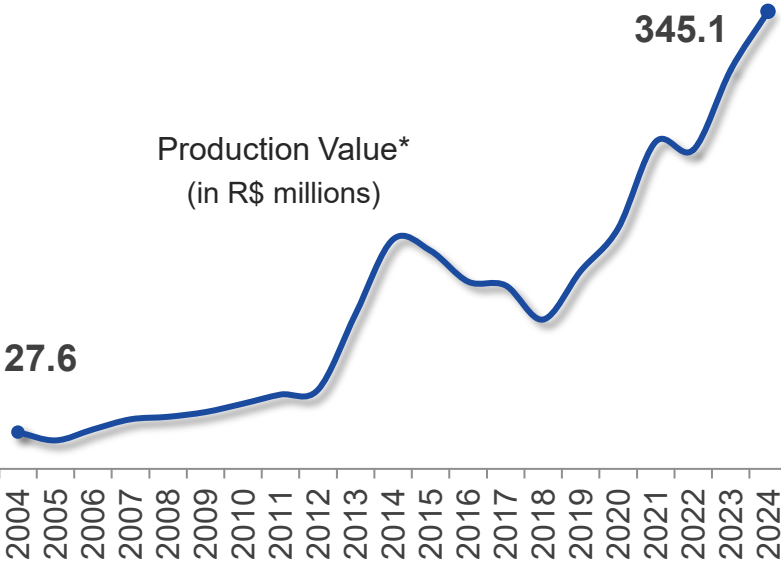
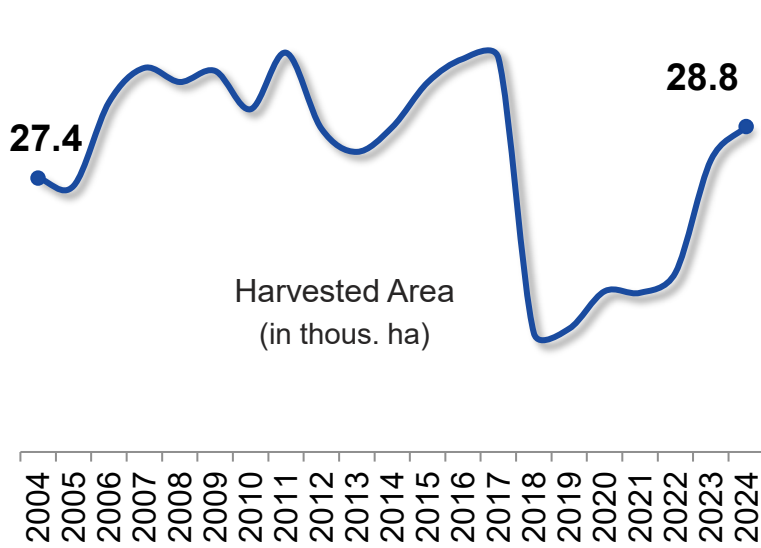
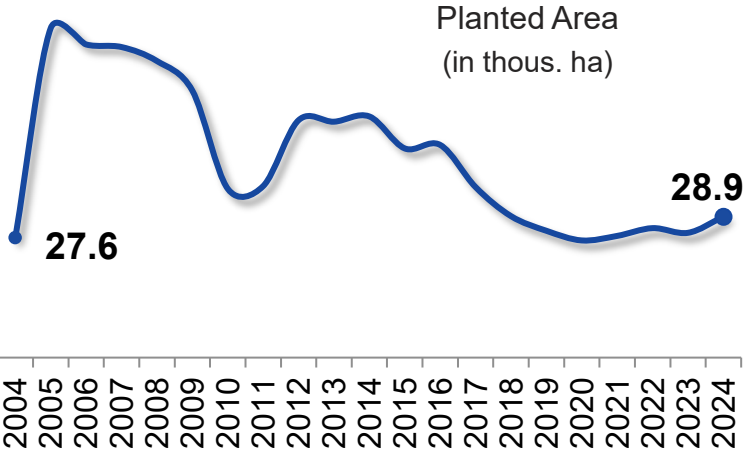
Brazil Foreign Trade

Main destinations of Brazil's Erva-Mate exports | 2024



Rio Grande do Sul – Overview

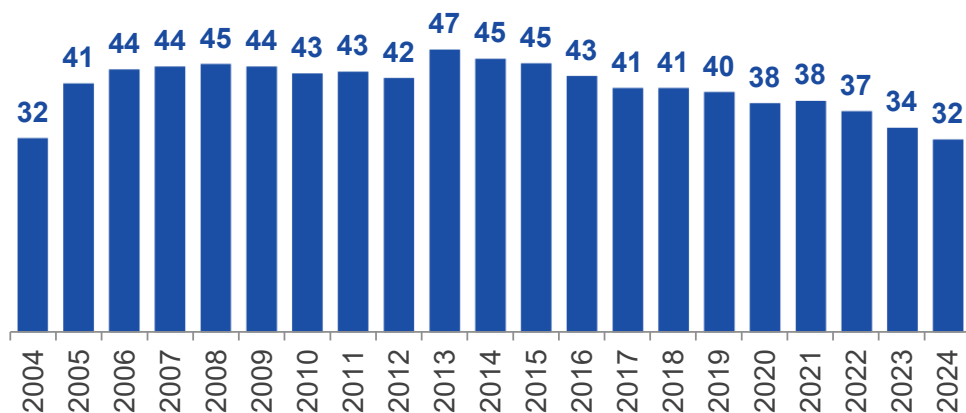
2024	Planted Area (in hectares)	28,909
	Harvested Area (in hectares)	28,787
	Production (in tonne)	283,652
	Production Value (in R\$ thous.)	345,140



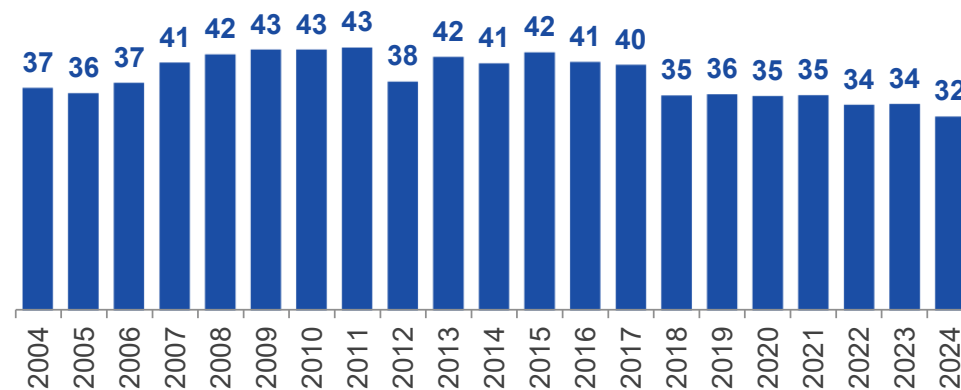
Source: IBGE – PAM 2024. *In R\$ from 2024. Deflated by IPCA.

Participation in Brazil

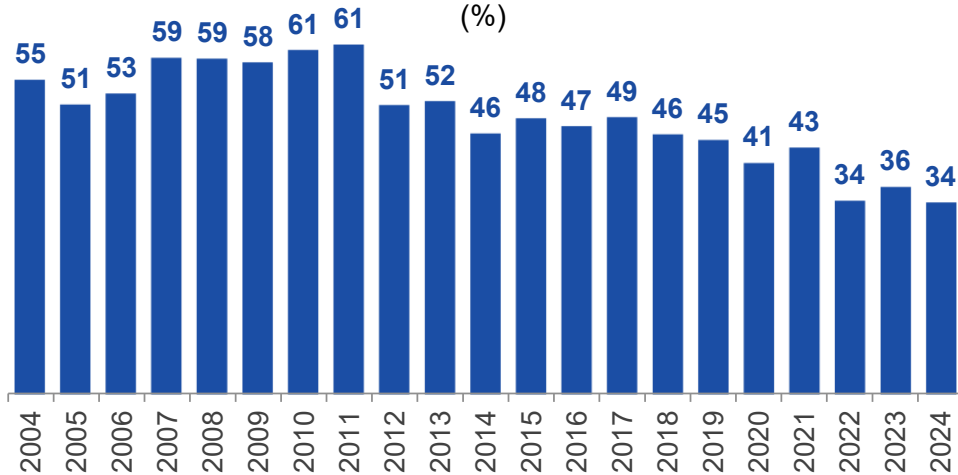
Planted Area (%)



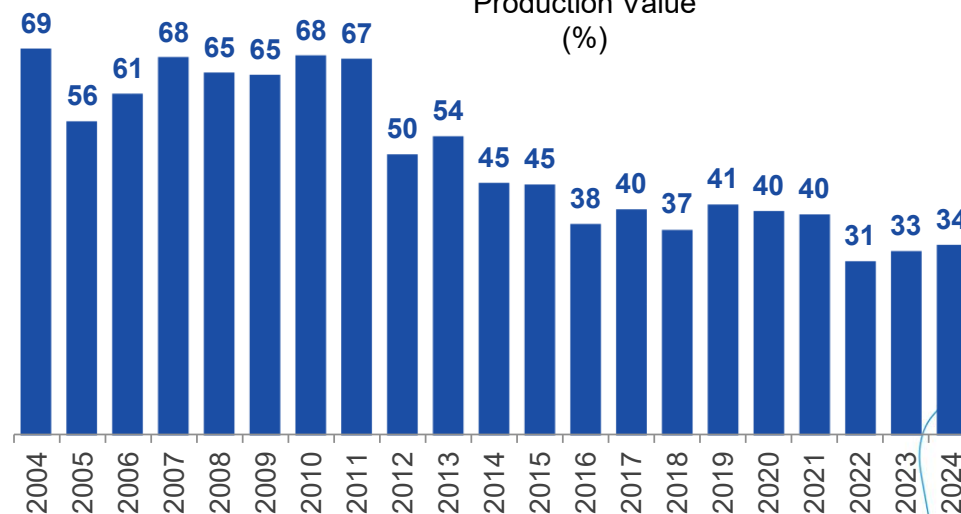
Harvested Area (%)



Production (%)



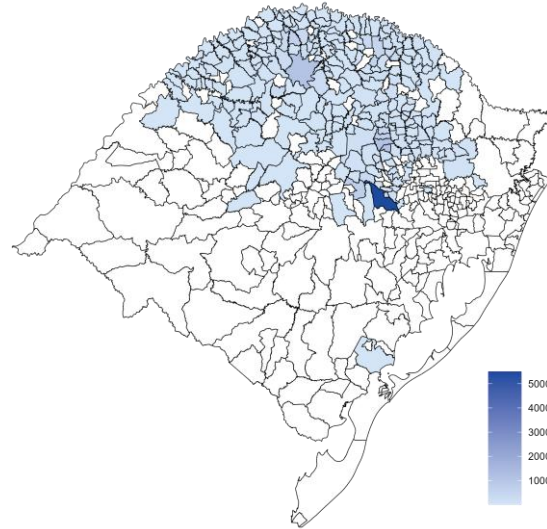
Production Value (%)



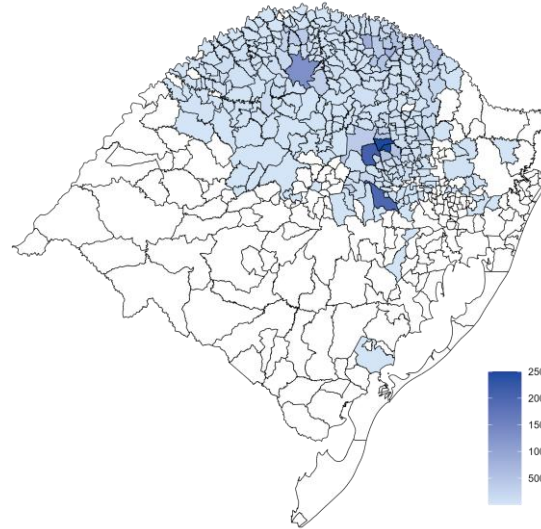
Source: IBGE – PAM 2024.

Municipalities – Planted Area

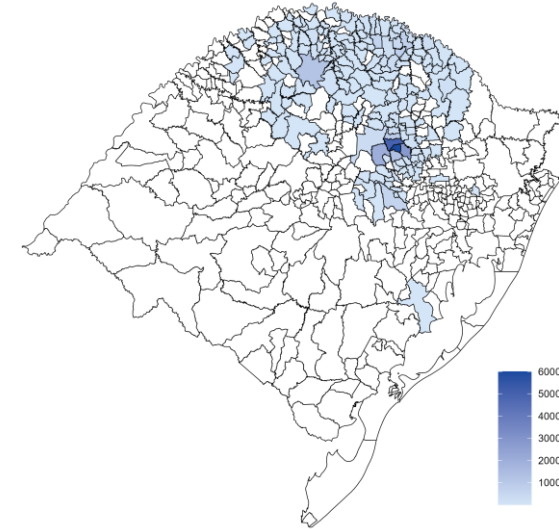
1994



2004



2024



	1994	Hectares	%
1º	Venâncio Aires (RS)	5.500	25,0
2º	Arvorezinha (RS)	1.140	5,2
3º	Ilópolis (RS)	1.100	5,0
4º	Palmeira das Missões (RS)	1.100	5,0
5º	Sinimbu (RS)	700	3,2
6º	Itapuca (RS)	680	3,1
7º	Erval Seco (RS)	591	2,7
8º	Erebango (RS)	540	2,5
9º	Erechim (RS)	480	2,2
10º	Nova Alvorada (RS)	450	2,0
Group Total		12.281	55,8
Other Municipalities		9.717	44,2
Total		21.998	100,0

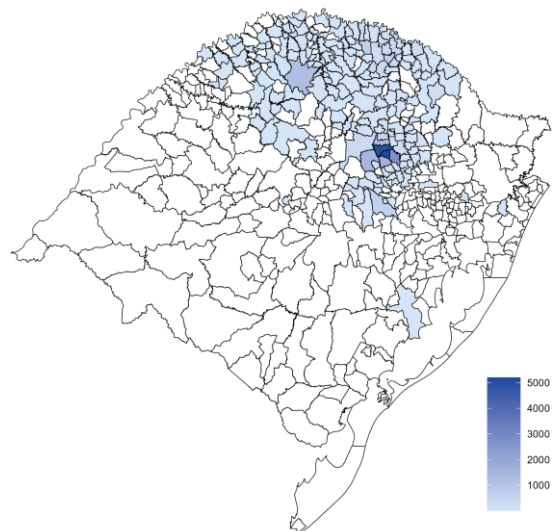
	2004	Hectares	%
1º	Arvorezinha (RS)	2.500	9,1
2º	Ilópolis (RS)	2.500	9,1
3º	Fontoura Xavier (RS)	2.100	7,6
4º	Venâncio Aires (RS)	2.000	7,3
5º	Palmeira das Missões (RS)	1.300	4,7
6º	Barão de Cotegipe (RS)	800	2,9
7º	Áurea (RS)	750	2,7
8º	Anta Gorda (RS)	500	1,8
9º	Getúlio Vargas (RS)	500	1,8
10º	Itapuca (RS)	500	1,8
Group Total		13.450	48,8
Other Municipalities		14.129	51,2
Total		27.579	100,0

	2024	Hectares	%
1º	Ilópolis (RS)	6.000	20,8
2º	Arvorezinha (RS)	5.000	17,3
3º	Anta Gorda (RS)	2.800	9,7
4º	Fontoura Xavier (RS)	2.000	6,9
5º	Putinga (RS)	1.300	4,5
6º	Palmeira das Missões (RS)	1.200	4,2
7º	Itapuca (RS)	940	3,3
8º	Áurea (RS)	770	2,7
9º	Viadutos (RS)	720	2,5
10º	Barão de Cotegipe (RS)	626	2,2
Group Total		21.356	73,9
Other Municipalities		7.553	26,1
Total		28.909	100,0

Source: IBGE – PAM 2024.

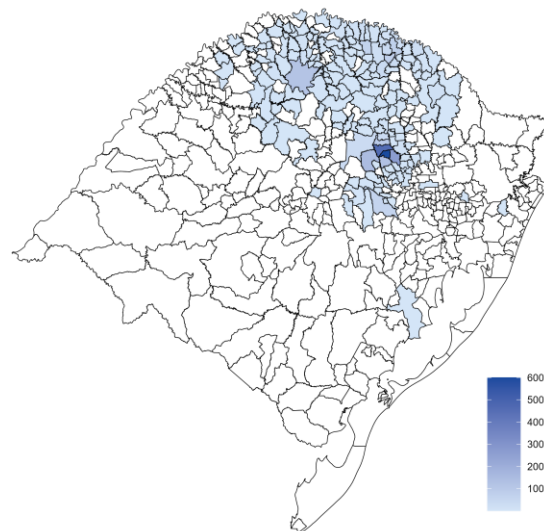
Municipalities – Planted Area

2022



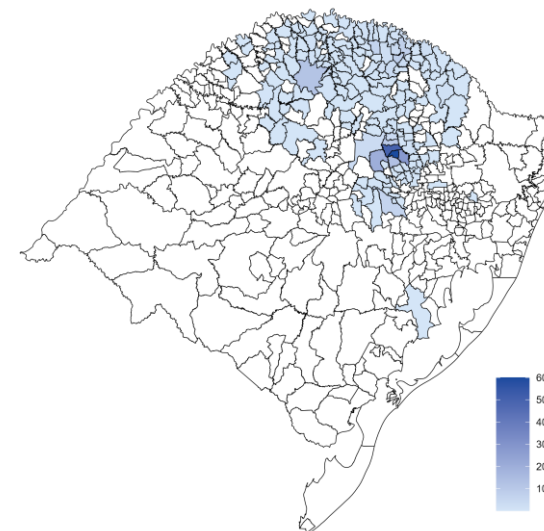
	2022	Hectares	%
1º	Ilópolis (RS)	5.200	18,4
2º	Arvorezinha (RS)	5.000	17,7
3º	Anta Gorda (RS)	2.700	9,6
4º	Putinga (RS)	1.600	5,7
5º	Fontoura Xavier (RS)	1.470	5,2
6º	Itapuca (RS)	1.270	4,5
7º	Palmeira das Missões (RS)	1.200	4,3
8º	Áurea (RS)	760	2,7
9º	Barão de Cotegipe (RS)	626	2,2
10º	Venâncio Aires (RS)	600	2,1
	Group Total	20.426	72,5
	Other Municipalities	7.764	27,5
	Total	28.190	100,0

2023



	2023	Hectares	%
1º	Ilópolis (RS)	6.000	21,5
2º	Arvorezinha (RS)	4.600	16,5
3º	Anta Gorda (RS)	2.650	9,5
4º	Fontoura Xavier (RS)	1.470	5,3
5º	Putinga (RS)	1.300	4,7
6º	Palmeira das Missões (RS)	1.200	4,3
7º	Itapuca (RS)	940	3,4
8º	Áurea (RS)	750	2,7
9º	Viadutos (RS)	730	2,6
10º	Barão de Cotegipe (RS)	626	2,2
	Group Total	20.266	72,7
	Other Municipalities	7.628	27,3
	Total	27.894	100,0

2024

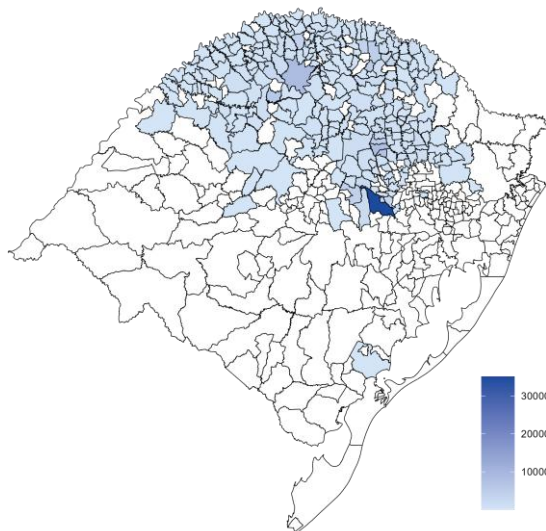


	2024	Hectares	%
1º	Ilópolis (RS)	6.000	20,8
2º	Arvorezinha (RS)	5.000	17,3
3º	Anta Gorda (RS)	2.800	9,7
4º	Fontoura Xavier (RS)	2.000	6,9
5º	Putinga (RS)	1.300	4,5
6º	Palmeira das Missões (RS)	1.200	4,2
7º	Itapuca (RS)	940	3,3
8º	Áurea (RS)	770	2,7
9º	Viadutos (RS)	720	2,5
10º	Barão de Cotegipe (RS)	626	2,2
	Group Total	21.356	73,9
	Other Municipalities	7.553	26,1
	Total	28.909	100,0

Source: IBGE – PAM 2024.

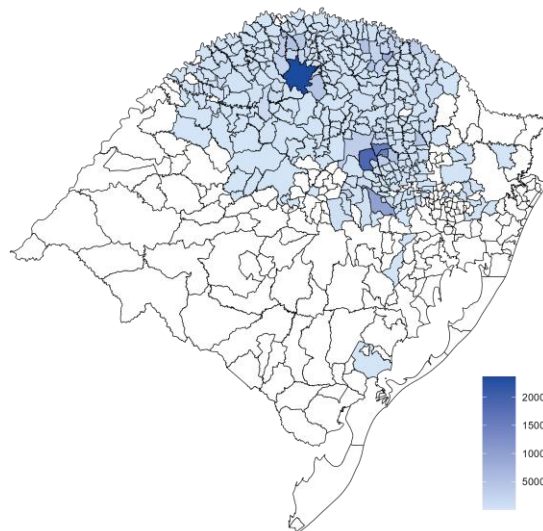
Municipalities – Production

1994



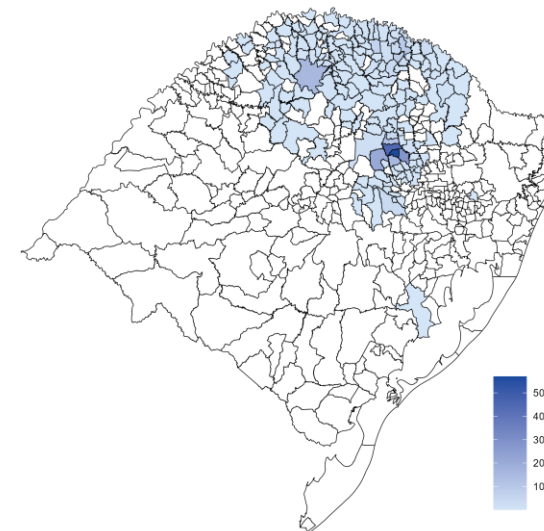
	1994	tons	%
1º	Venâncio Aires (RS)	35.100	19,8
2º	Palmeira das Missões (RS)	8.576	4,8
3º	Arvorezinha (RS)	8.010	4,5
4º	Ilópolis (RS)	7.000	4,0
5º	Ajuricaba (RS)	5.880	3,3
6º	Erebango (RS)	5.076	2,9
7º	Erechim (RS)	4.704	2,7
8º	Itapuca (RS)	4.320	2,4
9º	Sinimbu (RS)	3.920	2,2
10º	Barão de Cotegipe (RS)	3.600	2,0
Group Total		86.186	48,6
Other Municipalities		90.995	51,4
Total		177.181	100

2004



	2004	tons	%
1º	Palmeira das Missões (RS)	23.660	10,6
2º	Fontoura Xavier (RS)	18.900	8,5
3º	Arvorezinha (RS)	15.000	6,7
4º	Ilópolis (RS)	15.000	6,7
5º	Venâncio Aires (RS)	9.900	4,4
6º	Áurea (RS)	8.250	3,7
7º	Erval Seco (RS)	4.900	2,2
8º	Barão de Cotegipe (RS)	4.800	2,2
9º	Erebango (RS)	4.606	2,1
10º	Anta Gorda (RS)	4.500	2,0
Group Total		109.516	49,1
Other Municipalities		113.368	50,9
Total		222.884	100

2024

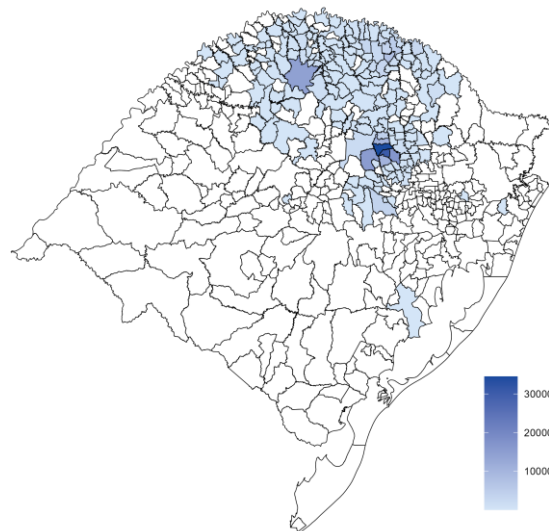


	2024	tons	%
1º	Ilópolis (RS)	56.953	20,1
2º	Arvorezinha (RS)	45.000	15,9
3º	Anta Gorda (RS)	28.000	9,9
4º	Fontoura Xavier (RS)	20.778	7,3
5º	Palmeira das Missões (RS)	15.600	5,5
6º	Putinga (RS)	15.600	5,5
7º	Itapuca (RS)	11.280	4,0
8º	Viadutos (RS)	8.640	3,0
9º	Áurea (RS)	8.085	2,9
10º	Barão de Cotegipe (RS)	5.634	2,0
Group Total		215.570	76,0
Other Municipalities		68.082	24,0
Total		283.652	100

Source: IBGE – PAM 2024.

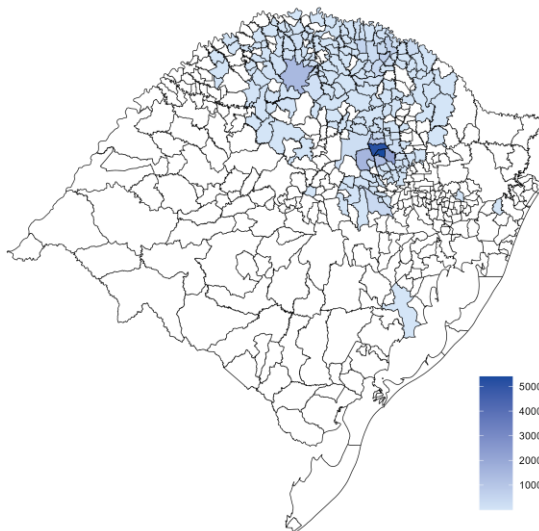
Municipalities – Production

2022



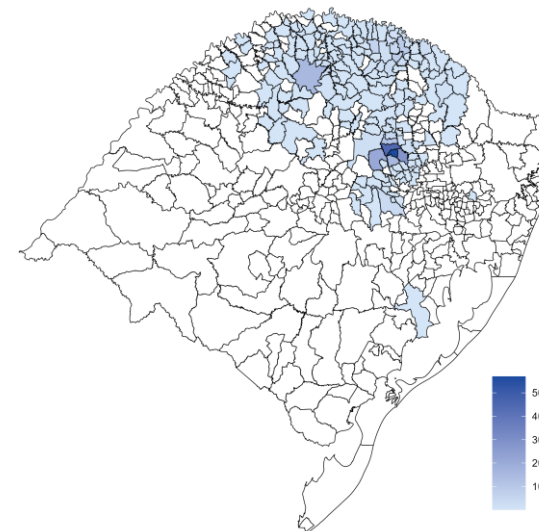
2022		tons	%
1º	Arvorezinha (RS)	34.500	16,4
2º	Ilópolis (RS)	30.400	14,4
3º	Anta Gorda (RS)	16.800	8,0
4º	Fontoura Xavier (RS)	15.370	7,3
5º	Palmeira das Missões (RS)	14.400	6,8
6º	Putinga (RS)	10.400	4,9
7º	Itapuca (RS)	10.340	4,9
8º	Áurea (RS)	6.840	3,2
9º	Viadutos (RS)	4.800	2,3
10º	Nova Alvorada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

2023



2023		tons	%
1º	Ilópolis (RS)	54.000	20,1
2º	Arvorezinha (RS)	51.750	19,3
3º	Anta Gorda (RS)	22.525	8,4
4º	Fontoura Xavier (RS)	15.309	5,7
5º	Palmeira das Missões (RS)	14.400	5,4
6º	Putinga (RS)	12.740	4,7
7º	Itapuca (RS)	11.280	4,2
8º	Áurea (RS)	7.875	2,9
9º	Viadutos (RS)	5.840	2,2
10º	Barão de Cotegipe (RS)	5.634	2,1
Group Total		201.353	75,1
Other Municipalities		66.889	24,9
Total		268.242	100

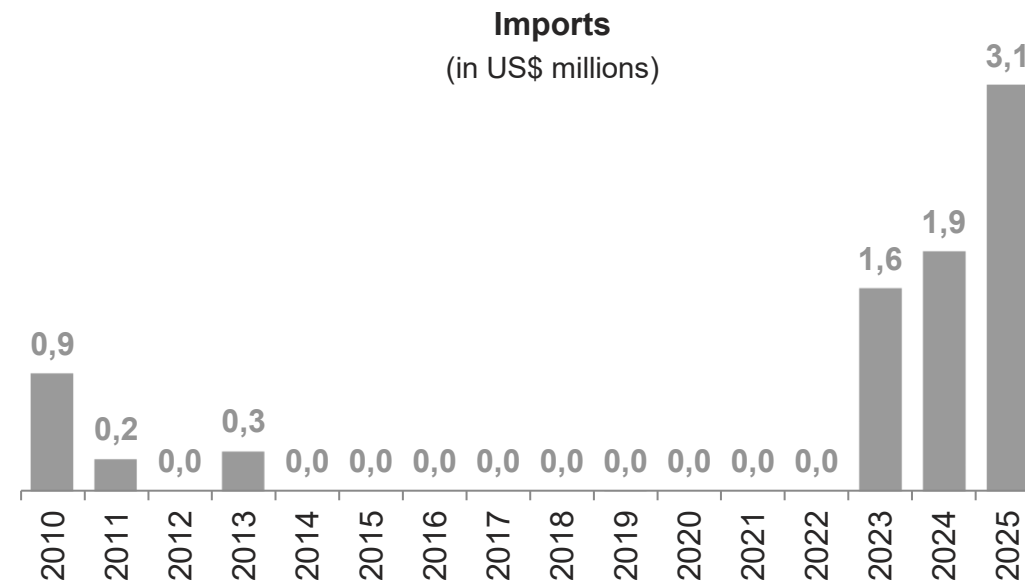
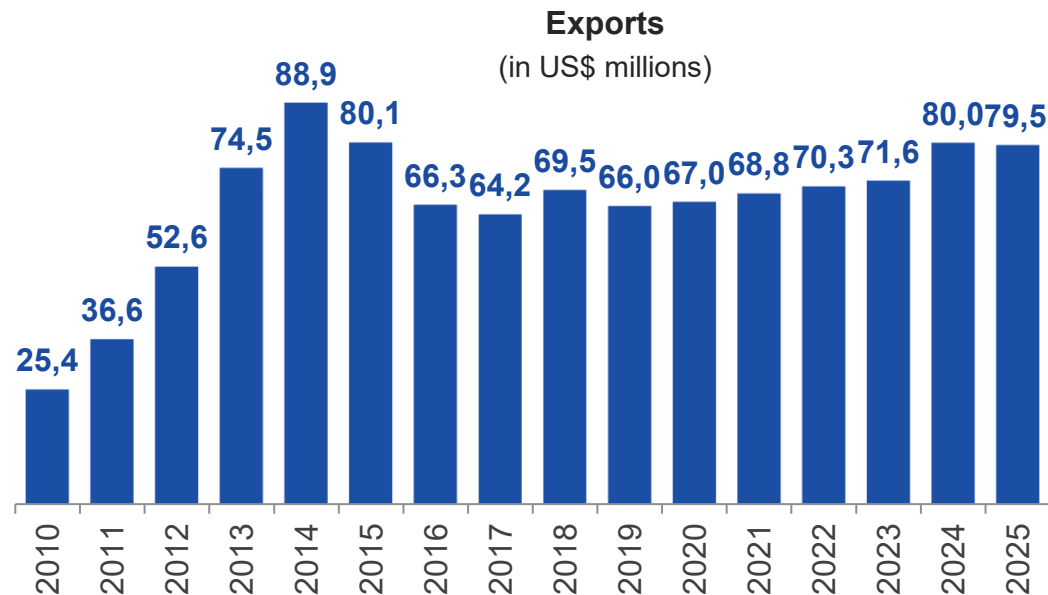
2024



2024		tons	%
1º	Ilópolis (RS)	56.953	20,1
2º	Arvorezinha (RS)	45.000	15,9
3º	Anta Gorda (RS)	28.000	9,9
4º	Fontoura Xavier (RS)	20.778	7,3
5º	Palmeira das Missões (RS)	15.600	5,5
6º	Putinga (RS)	15.600	5,5
7º	Itapuca (RS)	11.280	4,0
8º	Viadutos (RS)	8.640	3,0
9º	Áurea (RS)	8.085	2,9
10º	Barão de Cotegipe (RS)	5.634	2,0
Group Total		215.570	76,0
Other Municipalities		68.082	24,0
Total		283.652	100

Source: IBGE – PAM 2024.

Rio Grande do Sul Foreign Trade



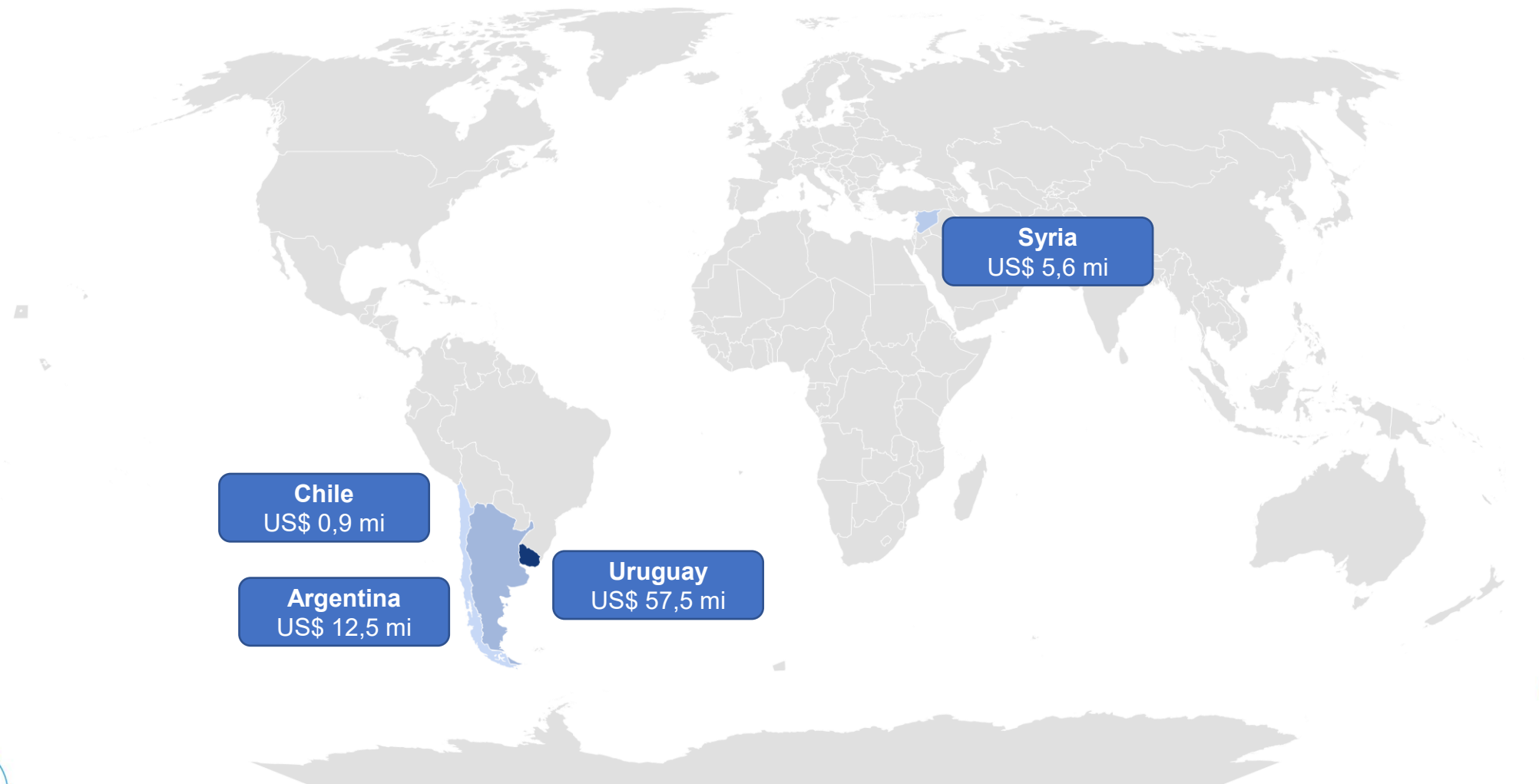
	2025	US\$	%
1º	Encantado	55,437,843	69.2
2º	Barão de Cotegipe	7,947,290	9.9
3º	Venâncio Aires	7,197,096	9.0
4º	Arvorezinha	5,691,834	7.1
5º	Nova Prata	2,457,576	3.1
6º	Erechim	744,757	0.9
	Other municipalities	693,749	0.9
	Group total	80,170,145	100.0

Main exporting municipalities (2025)*

Source: SECEX/MDIC. *The values considered refer to the customs clearance data of the goods.

Rio Grande do Sul Foreign Trade

Main destinations of Rio Grande de Sul's Erva-Mate exports | 2025



Source: SECEX/MDIC.

Permanent Crops*

	Planted area (ha)	%
Grape	47,886	29.3
Erva-mate	28,909	17.7
Orange	20,101	12.3
Apple	15,532	9.5
Tangerine	12,124	7.5
Banana	12,181	7.5
Peach	11,341	6.9
Others	15,254	9.3
Total	163,418	100.0

	Harvested area (ha)	%
Grape	47,855	29.5
Erva-mate	28,787	17.7
Orange	19,874	12.3
Apple	15,532	9.6
Banana	12,160	7.5
Tangerine	11,903	7.3
Peach	11,337	7.0
Others	14,751	9.1
Total	162,199	100.0

	Production (t)	%
Grape	686,651	30.0
Apple	493,345	21.6
Orange	302,679	13.2
Erva-mate	283,652	12.4
Tangerine	156,148	6.8
Banana	144,908	6.3
Peach	123,633	5.4
Others	94,189	4.1
Total	2,609,205	100.0

	Production value (R\$ thousand)	%
Grape	1,598,405	29.5
Apple	1,411,431	26.0
Orange	573,685	10.6
Peach	385,156	7.1
Banana	374,373	6.9
Erva-mate	345,140	6.4
Tangerine	344,206	6.3
Others	393,203	7.2
Total	5,425,599	100.0

***Observation:** only permanent crops were included (planted areas with long-duration crops), temporary crops of any kind were not considered.

Source: IBGE – PAM 2024.

Rio Grande do Sul Foreign Trade

Manufacturing Exports 2025
(In US\$ millions)

Divisions	US\$ M (2025)	Part. (%)
Food	5,143	30.7%
Tobacco	3,040	18.1%
Machinery and equipment	1,323	7.9%
Chemichals	1,238	7.4%
Pulp and Paper	1,223	7.3%
Vehicles	981	5.8%
Leather and footwear	878	5.2%
Metal products	609	3.6%
Oil derivatives	491	2.9%
Rubber and plastics	371	2.2%
Wood products	322	1.9%
Eletrical equipment	267	1.6%
Furniture	256	1.5%
Metalurgy	194	1.2%
Other manufacturing	130	0.8%
Non-metalic minerals	87	0.5%
Computer equipment and eletronics	68	0.4%
Beverages	42	0.3%
Wearing apparel	34	0.2%
Textile products	30	0.2%
Pharmaceuticals	25	0.2%
Other transport equipments	15	0.1%
Printing and reproduction	5	0.0%
Manufacturing	16,772	100.0%

If **Erva-mate** exports (**US\$ 79.5 million in 2025**) were considered a sector of the Manufacturing Industry, it would represent the **17th** largest exporting sector in 2025, ahead of other important segments of the Manufacturing Industry, such as IT Equipment, Beverages, Clothing and Accessories, and Textiles.



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ESTUDOS ECONÔMICOS**

**OBSERVATÓRIO DA
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