

# PAN-AMAZON CHALLENGE

## EXECUTIVE REPORT



► Açai, Brasil

# Pan-Amazon Challenge

## *About AmazonBeEco*

The Amazon is home to more than 10% of global biodiversity, spans 40% of South America, and sustains over 400 Indigenous peoples and traditional communities. It is also one of the world's most economically marginalized regions. AmazonBeEco was created to change that.

Funded by BID Lab (the IDB's innovation laboratory), the Green Climate Fund, and Conexsus, AmazonBeEco strengthens community biobusinesses—enterprises led by Indigenous peoples, traditional communities, and family farmers that generate income while protecting the forest. The initiative operates across six Pan-Amazon countries through a network of territorial partners: the IC Foundation (Colombia), Fundación Aliados (Ecuador), the National Coordinating Coalition (Guyana), NESsT (Peru), and the Amazon Conservation Team (Suriname), all coordinated by Conexsus in Brazil.

This report presents findings from the first comprehensive Pan-Amazon mapping effort of its kind, covering regulatory frameworks, organizational maturity, financial ecosystems, and market opportunities across all six countries. In total, the mapping identified 3,203 biobusinesses, characterized 730 of them, and mapped 15 value chains, 96 financial actors, and 211 regulations. These data will guide project interventions, inform policy, and anchor a unified regional platform for the bioeconomy.



# The Pan-Amazon

## *THE WORLD'S GREEN ENGINE*

The Amazon rainforest is the largest on Earth. It stretches across nine countries, regulates the global climate, and harbors biodiversity found nowhere else. Yet the communities that protect it — more than 400 Indigenous peoples and traditional groups — face persistent poverty, insecure land rights, and limited access to markets and finance.

The bioeconomy offers a different path. Rather than extracting resources industrially, it builds on ancestral knowledge, sustainable land use, and community governance to create businesses that benefit people and the forest alike. Community biobusinesses — cooperatives, associations, and family enterprises — are already doing this work. The question is how to help them grow.



► Açaí, Brasil

# Methodology

AmazonBeEco conducted four thematic mappings using a mixed-methods approach, including document review, structured surveys, and interviews with biobusiness members, sector experts, and key institutions. Partners in each country aligned to common protocols to ensure consistency across the dataset.

Biobusiness data from Colombia, Ecuador, Guyana, Peru, and Suriname were collected in 2025. Brazil's data draw on Conexsus's 'Desafio Conexsus' program (2018–2020), integrated with the new dataset to provide the broadest possible Pan-Amazon picture.



► Mapping, Brasil.





► Chontaduro, Colombia

## Mapping 1: *Policy and Regulatory Context*

The first mapping assessed the political, legal, and institutional environment for the bioeconomy in each country — identifying enabling frameworks, key actors, and gaps that limit the growth of community biobusiness.



► Innovation workshop, Putumayo, Colombia

## Colombia

Since 2018, the bioeconomy has been recognized as a national strategy through CONPES 3934 (Green Growth Policy), and a landmark 2018 ruling declared the Amazon a legal subject of rights. The framework is broad but fragmented — there is no overarching law coordinating environmental authorities, productive sectors, and government levels.

### *Key actors*

#### → Public

DNP (policy coordination), MinAmbiente (green business policy), MinAgricultura, SENA, and the Rural Development Agency (ADR) drive implementation. INVIMA and ICA oversee market access and food safety.





### → Research

SINCHI and Agrosavia generate the scientific base for bioeconomy innovation.

### → International cooperation

GIZ, UNDP, WWF, Gaia Amazonas, and BID Lab provide funding and on-the-ground support.

### → Private sector

Natura Cosméticos has developed fair biocommerce sourcing models in partnership with local communities.

## Ecuador

Ecuador has no dedicated bioeconomy law, but since 2020 has been building a National Bioeconomy Strategy through MAATE, MAG, and MPCEIP. The 2024 'White Paper on Ecuador's Bioeconomy' was a significant milestone. Note: a 2025 government restructuring merged MAATE into the Ministry of Energy and Mines — a move that may significantly set back bioeconomy progress.

### *Key actors*

#### → Public

MAATE, MAG, and the STCTEA (the technical secretariat for the Amazon constituency) lead planning and finance for the region.

#### → Academia

Ikiam University's biobusiness incubator is a critical hub for knowledge transfer..

#### → Indigenous representation

The Chakra Corporation and CONFENIAE (representing ~1,500 communities) are deeply integrated with institutional actors.

#### → Finance

CONAFIPS, the FIAS environmental fund, IICA competitive grants, and Bionegocios Ecuador.



► Cacota and copoazú, Colombia / Açaí, Colombia / Innovation workshop, Putumayo, Colombia.





► Sumaco, Archidona, Sacha Laran, Ecuador.

## Guyana

Guyana's Low Carbon Development Strategy (LCDS) 2030 is the most coherent bioeconomy policy framework in the region. It ties forest conservation to carbon revenue, allocating 15% of carbon market income directly to Indigenous communities. The Amerindian Act 2006 underpins Indigenous rights.

### *Key actors*

#### → Public

Ministry of Finance (funding flows), Small Business Bureau (direct enterprise support), Ministry of Amerindian Affairs (land rights), EPA, and Guyana Forestry Commission (resource regulation).

#### → Finance

The Rupununi Innovation Fund, administered by the Guyana Bank for Trade & Industry, is a working model for community finance.



## Perú

Peru has the most developed bioeconomy policy architecture in the group, including a National Bioeconomy Policy (2021), a National Capacity Development Plan, and a suite of legal instruments such as the National Biocommerce Strategy and Law 27037 (Amazon Investment Promotion). In practice, however, implementation remains uneven and depends heavily on the political priorities of each administration.

### *Key actors*

#### → **Public**

MINAM leads; MIDAGRI and PRODUCE deploy productive chain programs.

#### → **Indigenous**

AIDSEP is the primary national representative body for native communities.

#### → **Civil society**

AIDER, CEDIA, and NAB Peru support sustainable development and entrepreneurship.

#### → **Private sector**

Companies like Natura are key buyers in forest value chains.



## Surinam

Suriname lacks a national bioeconomy strategy. While relevant frameworks—such as the Green Development Strategy and the National Biodiversity Action Plan (NBSAP)—exist on paper, they are poorly implemented due to gaps in operational regulations



► Lago Agrio, Ecuador / Coca-orellana, Ecuador / Achiote, Ecuador.

and monitoring. The Socio-Bioeconomy Policy and the 2020 Environmental Framework Act provide a partial foundation for progress.

### ***Key actors***

#### **→ Public**

SBB (forest management oversight); ministries of Finance, Environment (ROM), and Land Policy (GBB).

#### **• Research**

CELOS conducts research on biodiversity and natural resources.

#### **→ NGOs**

ACT plays a central role in community empowerment and capacity building.

#### **→ Finance**

NOB and Finabank provide loans to sector organizations.

#### **→ Private sector**

The largest stakeholder group, active in ecotourism, NTFPs, and traditional medicine.





► Pineapple, Ecuador.

## Challenges

### *Economic Barriers*

Across all six countries, the mapping revealed the same core problem: support mechanisms simply do not fit the Amazon. Financing products are designed for formal businesses with collateral and financial records — not cooperatives operating in remote forests. Key barriers include:

#### → Finance

Formal banks require guarantees and financial plans that most biobusinesses cannot produce. Rural microcredit is scarce, and existing incentives are largely unknown or inaccessible.

#### • Infrastructure

Poor roads, unreliable energy, and high transport costs make Amazonian products uncompetitive before they even reach the market.



### → Markets

Most biobusinesses depend on intermediaries and sell raw materials — leaving significant value on the table. Certification costs are prohibitive, and formal market linkages are weak.

### → Finance

NOB and Finabank provide loans to sector organizations..

### → Formalization

Registration is expensive and complex, and land tenure insecurity makes it difficult to attract investment or access credit.

## Social Gaps

The communities driving the bioeconomy are also among the most underserved. In the Ecuadorian Amazon, 44% of the population lives in extreme poverty. In Colombia's Orinoquía-Amazon region, 54% of households have low educational attainment. Limited access to electricity, clean water, connectivity, healthcare, and education constrains not only the quality of life but also economic competitiveness.

### Land rights

Land insecurity is perhaps the single most significant structural barrier. In Peru, 83% of survey respondents stated that property rights are undefined or unprotected, and only 30% of native communities hold formal titles. In Colombia, 64% of institutions reported similar challenges. In Suriname, Indigenous collective land rights are not legally recognized. Without secure tenure, communities cannot access credit, make long-term investments, or resist encroachment from mining, oil, and forestry concessions, which are often granted without prior consultation.



► Kemito Ene, Satipo, Perú / Taropoto, San Martín, Perú / Kemito Ene, Satipo, Perú.



## Gender and Generational Gaps

Women are highly active in community biobusinesses but face structural barriers to leadership, training, and productive resources. In Guyana, 32% of businesses are women-owned — but female-led enterprises have significantly higher failure rates, pointing to systemic disadvantages rather than individual capacity. In Suriname, domestic responsibilities further limit women's participation in governance.

Youth migration is accelerating in most countries. In Peru, the rural-urban movement is breaking the generational chain of traditional knowledge transfer. When young people leave, communities lose both the knowledge and the labor needed to sustain biobusinesses into the future.

### *Institutional Fragility*

Political instability and regulatory fragmentation undermine long-term investment across the region. Frequent government changes disrupt programs, erode institutional memory, and leave biobusinesses in regulatory limbo. Inter-agency coordination is weak, formalization pathways are costly and complex, and traditional knowledge remains poorly protected, with few legal mechanisms to ensure that communities benefit from its commercial use.



► Caquetá, Colombia.



# Opportunities

## *What's Working*

- Most countries have foundational biodiversity and environmental laws, as well as national green growth strategies that can anchor the bioeconomy.
- Indigenous governance frameworks — laws, decrees, and territorial rights — provide communities with a legal basis for managing resources and negotiating partnerships.
- Regional research institutions and universities are generating the technical knowledge base for biological product innovation.
- Global climate commitments (the Paris Agreement, the SDGs) have positioned the Amazon as a priority for climate finance — a significant and largely untapped funding opportunity.
- Growing consumer demand for ethical, traceable, natural products in the US, EU, Japan, and South Korea creates real market pull for Amazonian biodiversity products.

## *Priority Entry Points*

- Land tenure: Accelerating titling and legal land security is the prerequisite for everything else — credit access, investment, and long-term planning.
- Multi-sectoral dialogue: Technical roundtables that bring together the environment, agriculture, trade, and finance sectors can cut through regulatory fragmentation.



► Kemito Ene, Satipo, Perú.

- Adapted finance: Green credit lines and revolving funds with simplified requirements and repayment terms matched to biological production cycles.
- Streamlined certification: Progressive formalization pathways and one-stop windows tailored to the small scale of Amazonian biobusinesses.
- Traditional knowledge protection: Legal frameworks that recognize ancestral knowledge and ensure communities share in the commercial benefits.
- Digital infrastructure: Connectivity and decentralized renewable energy to reduce logistics costs and enable local processing.

## Mapeo 2

### *Bionegocios y sus ecosistemas*

The second mapping characterized the biobusiness ecosystem in each country — collecting data on organizational structure, membership, products, partnerships, and market access. Here is what it found.

#### Brazil

396 cooperatives and associations were identified across Acre, Amazonas, Amapá, Maranhão, Mato Grosso, Pará, Rondônia, and Tocantins. 63% have fewer than 100 members. The dominant value chains are non-timber forest products (NTFPs) — açai, Brazil nuts, seeds — present in 64% of organizations, followed by family farming (coffee, honey, fruit) at 43%, artisanry at 28%, and fishing at 25%. Most sell directly through public markets (70%), with limited reach into retail (35%) or industry (20%). Only 10% have accessed any formal financing.

#### Ecuador

Over 180 active biobusinesses were identified across the Amazonian provinces of Napo, Pastaza, Sucumbíos, Orellana, and Zamora-Chinchipe, narrowed to 101 legally registered organizations and 17 selected for direct project support. Most have between 11 and 50 legal members, though only 61% sell regularly, with intermediaries capturing much of the value. Indigenous and peasant communities are strongly represented.

The 17 supported biobusinesses together have 869 members (507 women, 362 men) and 119 active youth members aged 20–30. Main products: coffee and cacao, plus guayusa, ishpingo, sachá inchi, macambo, artisanry, and aquaculture. Most operate through agroforestry systems rooted in the traditional chakra model.



# Chakra

## Sabiduría ancestral

The chakra is a sophisticated agroforestry system developed by Kichwa, Shuar, Achuar, and Waorani communities — and the backbone of Ecuador's Amazonian rural economy. Recognized by the FAO as a Globally Important Agricultural Heritage System (GIAHS), it integrates biodiversity, food production, and forest conservation in a single land management approach. Chakramamas — the Kichwa women who hold and transmit this knowledge — manage 80% of chakras (FAO, 2023). Their role is not just cultural: it is the foundation of a viable bioeconomy model.

## Colombia

Starting from 2,248 initial records, the mapping validated 1,666 organizations and deeply characterized 145 community biobusinesses across Putumayo, Caquetá, Guaviare, and Amazonas. These organizations collectively count 9,399 members (7,877 active), generate 145 formal and 675 informal jobs, and record combined annual sales of COP \$18.6 billion. Women make up 54% of all members.

Product diversity is a strength: NTFPs, cacao, rubber, artisanry, Amazonian fruits, gastronomy, and nature tourism all appear. The main gap is commercialization — only 20% have formal sales channels, and more than half lack basic accounting tools.



► Colombia.

# Musu Pakarii

## Building peace through cacao

Founded in 2016 in Puerto Guzmán, Putumayo, the Musu Pakarii Association ('New Dawn' in Inga) supports Indigenous families and communities displaced by the armed conflict. It sells standard dry-grain cacao to Colombia's National Chocolate Company and certified organic cacao to France's Kaoka. It also produces table chocolate, snacks, and chocotentación — chocolates made with chontaduro, açai, nibs, cloves, and other Amazonian fruits. Musu Pakarii is proof that community biobusinesses can simultaneously drive peace, inclusion, and market success.



## Guyana

The mapping covered 8 of Guyana's 10 regions, identifying 78 biobusinesses and categorizing 15 as true community biobusinesses. Seven were selected for direct technical support. Organizations are small (15–30 active members on average), 83% Indigenous, with strong female leadership — including organizations run entirely by women. Products span agroprocessing, ecotourism, artisanry, cosmetics, and traditional medicine. Formal export is minimal: only one organization reports regular international sales.



► Methodology workshop.

# Blue Flame Women's Group

Women-led and market-ready

Based in Region 1, the Blue Flame Women's Group processes local cacao, cassava, and fruits into market-ready products. Their story illustrates how women-led biobusinesses can strengthen food security, create economic autonomy, and add value in regions far from urban markets — if they have the right support.

## Peru

64 biobusinesses were analyzed across nine Amazon regions — Loreto, Amazonas, San Martín, Ucayali, Junín, Madre de Dios, Cuzco, Pasco, and Puno. 66% have Indigenous leadership. 92% are legally registered. More than half have been operating for fewer than 8 years, signaling a young ecosystem with high support needs.

The commercial picture is improving: total sales grew 126% between 2023 and 2024. But 74% still report annual revenues below USD 27,000, and 41% have no digital presence. 38% still sell unprocessed raw materials. Nine organizations export primarily to the US, Mexico, and Canada.



► Kemito Ene, Satipo, Perú.



# Eto Tsireri Artisans Association

Reclaiming territory through craft

Located in the native community of Timpía (Cusco region), within the buffer zone of the Megantoni National Sanctuary, this collective of 24 Matsigenka women produces ceramics, backstrap-loom textiles, jewelry, and basketry. Their work revalues ancestral knowledge and ties cultural identity to economic sustainability — exhibited at ExpoAmazónica and Ruraq Maki: Our Heritage Made by Hand.

## Suriname

15 biobusinesses participated in the survey, drawn from Indigenous, Maroon, and other traditional communities in rural and forested territories. 13 are extractivist, focused on NTFPs. All are legally registered — 67% as cooperatives — with consensus-based governance. Products include açai, Brazil nuts, medicinal plants, natural cosmetics, and ecotourism. Most sell locally or nationally; only 3 of 15 sell internationally. 73% do not use market intelligence tools.



► Açai, Brasil

# Musu Pakarii

## Building peace through cacao

In southern Suriname's interior, Maroon communities hold a fundamentally different view of land: it cannot be owned, only used. This worldview shapes how biobusinesses are structured and how products are brought to market. Formalizing products from these communities is not just a commercialization strategy — it is a way to ensure fairer trade and protect a cultural model of land stewardship that has sustained these forests for centuries.





► Business Model Workshop, Florencia, Caquetá, Colombia.

## Mapping 3

### *Finance*

The third mapping assessed the financial ecosystem for community biobusinesses — analyzing regulatory frameworks, identifying public and private actors, and evaluating the mechanisms available to fund bioeconomy growth. The core finding: community biobusinesses across the Pan-Amazon face some of the highest costs of capital in the world, and the financial products available to them are almost entirely mismatched to their needs.

*The table below summarizes the landscape by country:*

| Country  | Key Opportunities                                                                                                                                  | Key Barriers                                                                                                                       | Priority Mechanisms                                                                                                           | Outlook                                                                                                                                       |
|----------|----------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|
| BRAZIL   | Strong policy framework; BNDES and government programs (Ecoinvest, Fundo Clima) actively support bioeconomy; civil society funds are innovating.   | Territorial inequality, regulatory overlap, and fiscal barriers that exclude traditional communities.                              | Readiness funding, PES, biodiversity bonds, debt swaps — leveraging the country's mature financial ecosystem.                 | Most advanced in the group. Must adapt instruments to lower-capacity territories and advance intercultural governance.                        |
| COLOMBIA | Green Taxonomy, BIC Companies, and PES Decree signal real policy momentum.                                                                         | Institutional fragmentation, norms poorly adapted to community biobusiness realities, and limited rural access to fiscal benefits. | Special credit lines and PES — scalable, institutionally backed (Finagro, Findeter, Banco Agrario), with working pilots.      | Strong emerging green finance ecosystem. The gap is connecting national instruments to territorial actors.                                    |
| ECUADOR  | The legal framework recognizes collective rights; the CONAFIPS bioeconomy taxonomy and the BASE program support community financing.               | Complex procedures, low inter-agency coordination, and weak local government capacity limit implementation.                        | Revenue-based financing, PES, and special credit lines — matched to community conservation and territorial realities.         | A leader in innovation (debt-for-nature swaps, participatory strategy). Main challenge: governance coherence across levels.                   |
| GUYANA   | Pioneer on carbon markets — ART-TREES credits flow directly to communities. FPIC is recognized in policy.                                          | Property conflicts, slow bureaucracy, and limited technical capacity in rural areas.                                               | Readiness funding, PES, and adapted credit lines — connecting performance-based payments to accessible community instruments. | Unique strategic position via carbon markets. Must build hybrid financial structures that combine climate revenue with community development. |
| PERU     | Robust normative architecture: green finance, biocommerce, and access/benefit-sharing regulations are all in place.                                | Complex procedures, restrictive fiscal requirements, and weak state presence in the Amazon.                                        | Readiness funding, PES, adapted credit — combining technical assistance, performance incentives, and local credit access.     | High potential for green financial innovation. Biocrédito and Profonanpe are promising models to scale.                                       |
| SURINAME | Tax incentives for sustainable forest investment: the Amazonia Forever program provides international access to technical and financial resources. | No environmental law; weak governance; no recognition of community land rights — creating investor uncertainty.                    | Readiness funding and special credit lines to build local capacity and structure viable projects.                             | Needs legislative and governance progress before more sophisticated instruments can work.                                                     |

# Recommendations

- **Build multi-actor coordination platforms**

territorial roundtables that bring governments, financial entities, international cooperation, the private sector, and communities to a common table — to align programs, share information, and design solutions together.

- **Create a standing technical assistance facility**

A permanent mechanism offering business model support, formalization guidance, impact measurement tools, and on-the-ground training — with territorial presence to respond to local realities.

- **Calibrate instruments to ecosystem maturity**

Early-stage contexts need awareness-building and pilots; more developed ecosystems can absorb structured finance and private investment. One size does not fit all.

- **Design a regional Wholesaler Fund with risk mitigation tools**

First-loss lines, guarantees, and adapted insurance — complemented by blended finance structures — to channel concessional capital through local intermediaries and de-risk investment in community biobusinesses.

- **Position community biobusinesses as a serious investment opportunity**

A targeted marketing effort — case studies, forum presence, territorial branding — to shift the narrative for investors, buyers, and international cooperation partners.





► Jam and Amazonian chili pepper, Florencia, Caquetá.

## Mapping 4

### *Market Opportunities*

The fourth mapping identified commercial opportunities for community biobusinesses at national and international levels. Five major opportunity areas stand out across the region:

#### **1. Natural ingredients, superfoods, and biocosmetics**

Global demand is strong and growing, particularly in the EU, US, South Korea, and Japan — all markets that actively seek traceable, ethically sourced Amazonian inputs.

## 2. NTFPs and artisanry

Sustainable forest products and natural-fiber artisanry offer income diversification and access to specialty and craft markets.

## 3. Functional and experiential food

A growing consumer segment is seeking unique ingredients — substitutes for synthetic additives — with documented natural and bioactive properties. Amazonian products are well-positioned for 'Precision Wellness' and 'Mood Food' trends.

## 4. Traditional knowledge as value

Indigenous and traditional communities bring cultural depth and product differentiation that cannot be replicated — a genuine competitive advantage in premium markets.

## 5. Ecotourism and nature experiences

Linked to culture and biodiversity, community ecotourism has strong scaling potential as a biobusiness model.



► Oil from Amazonian products, Villa Garzón, Putumayo, Colombia.

## Country-by-country commercial landscape

| Country  | Competitive Edge                                                                                                            | Strategic Products                                                                                                                  | Target Markets                                                                                                           | Export Opportunity                                                                                                                  | Key Channels                                                                                                |
|----------|-----------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------|
| BRAZIL   | Unmatched biodiversity; 2023 National Bioeconomy Secretariat; FSC, Organic, and Fair Trade certification capacity.          | Açaí, cacao (bean-to-bar), Brazil nuts, vegetable oils (Copaíba, Andiroba, Murumuru, Buriti), phytotherapeutics.                    | Functional food and superfood industry; clean beauty; fine chocolate. National and international B2B buyers.             | US (top açaí and Brazil nut importer), Germany, France, UK, Japan. High-value niches requiring Rainforest Alliance, COSMOS, or FDA. | Direct contracts, ethical e-commerce (Bioconex, Negócios pela Terra), Origens Brasil export network.        |
| COLOMBIA | One of the world's most biodiverse countries, Colombian cacao is classified as 'fine flavor' by ICCO.                       | Amazonian fruits (açaí, copoazú, sacha inchi, cacay); fine cacao; natural rubber; artisanry; nature tourism.                        | Gourmet chocolate (Belgium, Switzerland, Japan); cosmetics and nutraceuticals (US, EU, South Korea); sustainable rubber. | High demand for traceable, origin-linked cacao. Natural cosmetics market to exceed USD 25B by 2025.                                 | Biofach, SIAL, Natural Products Expo; Amazon, Etsy, Mercado Libre; direct sales and specialty distributors. |
| ECUADOR  | Top cacao and guayusa producer; chakra system recognized by FAO as GIAHS — a unique market differentiator.                  | Fine cacao and processed derivatives; coffee; guayusa; macambo; paiche fish; artisanry; natural cosmetics.                          | EU (tariff-free cacao); specialty importers; functional beverage sector (guayusa as a natural energy drink).             | Certified organic exports grew 74% in 2024. Guayusa positioned for 'Mood Food' trend in Europe.                                     | Traditional distributors (Tena, Nueva Loja, Puyo); MercadoLibre; EXPO AMAZONIA 2025.                        |
| GUYANA   | HFLD status; USD 237.5M/year in carbon credits (potential USD 4–5B); LCDS 2030 policy coherence.                            | Timber (Greenheart, Purpleheart); NTFPs (nibbi, balata, essential oils); agroprocessed goods (pepper sauces, cassava bread, honey). | US (timber, NTFPs); EU (certified timber); Caribbean (agroprocessed goods, CARICOM access).                              | Ethnic and organic food niches in the US; demand for EU sustainable forestry certification.                                         | GOInvest and Guyana Marketing Corporation trade events, direct exporters, and community markets.            |
| PERU     | 2nd largest Brazil nut exporter globally; specialty coffee and fine cacao reputation; wild-origin sustainability story.     | Coffee, cacao, Brazil nuts, sacha inchi, ginger, aguaje; biocosmetics (aguaje oil, copoazú butter); Amazonian eco-tourism.          | Organic cacao buyers in Switzerland, Germany, France, the US, and Asian cosmetics (aguaje in South Korea and Japan).     | 126% sales growth 2023–2024. 9 bio-businesses already export to the US, Mexico, and Canada.                                         | Lima/Callao logistics hub; Juntoz, Rappi, Mercado Libre; Perú Natura and Ginger Week fairs.                 |
| SURINAM  | 90%+ forest cover; rich ethnobotanical knowledge; growing international interest in organic and fair-trade Amazonian goods. | Cacao, Brazil nuts, stingless bee honey, açaí, medicinal plants, natural cosmetics, and wood artisanry.                             | EU diaspora (Netherlands, Belgium) for cosmetics and chocolate; national supermarkets and public markets.                | Tan Bun Skrati chocolate is already in the European market. The cosmetics sector has established diaspora channels.                 | Traditional distribution, regional trade fairs, and direct export.                                          |



## Products to Watch



### **Brazil** **Native rubber**

Once synonymous with colonial exploitation, native rubber is being reclaimed as a sustainable, community-led product. Brazil consumes more rubber than it produces — creating space for a responsible supply chain that benefits forest communities and provides verified-sustainable inputs to major tire and footwear manufacturers.





## Colombia

### Amazonian cacao

Colombia's Amazonian cacao is classified as 'fine flavor' by the ICCO — a designation reserved for less than 8% of global cacao production. Premium and gourmet buyers in Switzerland, Germany, France, the US, and Japan actively seek it. With the right investment in traceability, processing, and community governance, Colombian Amazonian cacao can command consistently high prices in the world's most discerning markets.





## **Ecuador**

### **Guayusa**

Ecuador leads global guayusa production, and demand is accelerating. With its naturally high caffeine content, rich antioxidant profile, and cultural roots in Indigenous Amazonian tradition, guayusa is ideally positioned as a natural energy drink in a category where consumers are actively moving away from synthetic additives. Germany and France are already paying premium prices for certified organic guayusa.





## Guyana Ecotourism

Guyana's Amazonian interior offers extraordinary biodiversity and intact Indigenous cultures — a combination that high-value nature tourism markets actively seek. Community enterprises like Kako Patasek Eco Lodge, Amerindian Experience, and the Shulinab Tourism Committee are already operating, turning conservation into livelihood. Ecotourism is one of the few bioeconomy models where the 'product' genuinely cannot be replicated elsewhere.





## Suriname

### Stingless bee honey

Indigenous communities in Kwamalasamutu and Tepu have revived the ancient practice of meliponiculture — keeping stingless bees native to tropical forests. With support from ACT, production grew from 25 to 109 liters in 2024 alone. The honey is used locally for medicinal purposes and sold externally as a premium artisanal product. It is a small-scale operation with real scaling potential — and a model for how niche, high-value forest products can generate meaningful community income.



## **Perú**

### **Brazil nuts**

Peru is the world's second-largest exporter of Brazil nuts, with established relationships in the US, Germany, the UK, and South Korea. The wild, sustainable origin of Peruvian Brazil nuts is a genuine market differentiator in premium and fair-trade channels — especially when backed by certification. The biggest opportunity lies in moving beyond raw nuts into value-added derivatives: flours, oils, snack formats, and ingredients for the cosmetics sector



# HOJA DE RUTA

## POTENCIAR LA AMAZONÍA

**Mapping the ecosystem is the first step. What follows is a set of strategic priorities — actions that can convert the data in this report into real growth for community biobusinesses across the Pan-Amazon.**

### 1. Fix the financing gap

Community biobusinesses often cannot access commercial capital on terms that work for them. Blended finance—combining patient, impact-oriented capital with commercial funding—is the most viable path to addressing this. Philanthropic and climate capital can absorb early risk, allowing commercial capital to follow as enterprises mature.

In parallel, community biobusinesses need to be brought into the pipeline of national and global climate funds. This requires regional coalitions, business development support, and targeted advocacy — because these instruments were not designed with Amazonian cooperatives in mind and will not adapt without pressure.

### 2. Add value before export

Exporting raw materials is leaving money in the forest. Processing cacao into nibs, butter, and liquor; turning sachu inchi into protein flour; converting Amazonian fruits into standardized extracts — these steps multiply the value of what communities produce without requiring more land or more labor. Community processing units, equipped with Good Manufacturing Practices and connected to clean energy and the internet, are the infrastructure investment that unlocks this.

### **3.** Solve logistics

Distance is the invisible cost that makes Amazonian products uncompetitive. Cold-chain storage hubs, shared transport routes, and inter-organizational logistics networks are not glamorous investments — but they are foundational. A cluster approach, in which neighboring biobusinesses coordinate pickups, storage, and shipments, can significantly reduce per-unit costs and expand access to markets that are currently out of reach.

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### **4.** Build business capability

Most community biobusinesses have strong products and committed members. What they lack is the commercial and management infrastructure to grow: business planning, pricing strategy, contract negotiation, sales skills, and brand development. Continuous, territorially present support — not one-off training workshops — is what actually builds capability. Programs should also invest in youth leadership and commercial English to prepare the next generation of bioeconomy entrepreneurs.

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### **5.** Use public procurement

Brazil has demonstrated that public food procurement programs (PNAE, PAA) can serve as a reliable and transformative commercial channel for community biobusinesses — providing stable demand, fair prices, and an entry point into formal markets. Other Pan-Amazon countries have the policy architecture to replicate this. What is needed is cross-country knowledge exchange between public procurement managers and adaptation of existing instruments to local contexts.

