



Partnerships for
Forests

**Enhancing
Colombia's
Bioeconomy
Through Açai**

March 2024

A close-up photograph of açaí berries on a branch, with a decorative graphic of concentric white and yellow circles in the top right corner. The berries are dark purple and clustered together. The background is a soft-focus green, suggesting a natural setting.

Summary

Açaí holds significant regional and global market potential. However, emerging Colombian açaí businesses encounter standardisation, processing capability, and regulatory compliance hurdles. Partnerships for Forests (P4F) has supported initiatives to strengthen the açaí value chain and improve livelihoods for local communities, and so discouraging deforestation. This case study explores this comprehensive effort to assess açaí's potential, back local enterprises in Colombia's Amazon and Pacific regions, analyse national and international market trends, and assist in designing optimal fruit harvesting regulations in Colombia. Reflections on challenges and lessons learned offer valuable insights for strengthening non-timber forest product (NTFP) value chains through public-private cooperation.



Photo: Corpocampo

Context

Known as a 'superfruit'¹ due to its high antioxidant and essential nutrient content, açai has significant global market potential.

Although Brazilian production meets most of the international demand for açai, there is a deficit of 1 million tons a year to meet global demand². The Colombian Pacific region boasts açai harvesting potential of up to 330,000 tons annually, offering significant opportunities for local economic development. This includes the potential creation of new enterprises, with projected revenues of £2.6 million, and an estimated 193 job opportunities across 10 years³.

In Colombia, new sustainable açai harvesting, collection, and processing enterprises have emerged. However, most of these ventures are very immature and face challenges around product standardisation, processing capacities, and compliance with health and sanitation regulations. The more mature enterprises require support to scale up. P4F has

supported three açai collection and processing enterprises that have a strong commitment to enhanced forest and sustainable land use. By doing so, they aim to increase and improve their production capacity and methods and, ultimately, expand the volume produced.

Açai palms grow in rainforest areas and deforestation threatens the palms and production. Among the drivers for deforestation are illegal mining, farming of illicit crops and illegal logging. Sustainable açai harvesting can discourage deforestation by offering ways for rainforest communities to improve their income. By the end of 2020, the Amazon region ranked as the most deforested of the six Colombian regions, followed by the Pacific⁴. Of three of the P4F supported companies two – Planeta SAS and Naidiseros del Pacifico – are in the Pacific region and the other – Corpocampo – has its main processing plant in the Putumayo (Amazon) department.

1. Superfruits are commonly understood as fruits that are particularly high in antioxidants and nutrients. Among the types of fruits considered superfruits are cranberries, goji berries, aguaje and açai berries.

2. This is one of the findings hired by P4F conducted by AMPLO consultancy.

3. Idem.

4. Institute of Hydrology, Meteorology and Environmental Studies (IDEAM), Early Deforestation Detection Bulletin. Available at: <<http://www.ideam.gov.co/documents/11769/126298837/Bolet%C3%ADn+25+-+IV+Trimestre+2020/a003b355-6f32-47f0-b521-10459a07d53a?version=1.0>>.

Colombia's biodiversity

Colombia's Pacific region has over 2.4 million hectares of protected area, forest reserve zones, and natural parks. These areas have important ecosystems such as the Maziso Colombiano, where rivers that supply 70% of the country's water supply are located. The forests in this area are among the most biodiverse on the planet. They have at least 2,000 species of endemic fauna and flora, including more than 5,400 plant species, and at least 192 mammals, 778 bird, 188 reptile, 139 amphibian and

196 fish species⁵. The Putumayo department has more than 1,000 bird species – more than 50% of the total in Colombia. It has the largest number of primate species and maintains the connection between the lower Amazon, the Andean foothills and the Orinoco. Of Putumayo's land area, 60.5% is under conservation and environmental protection, including high mountains, bodies of water, wetlands, and forests. Putumayo and the Vichada, Guainia, and Amazonas departments make up the Colombian Amazon.

P4F has funded activities to strengthen and scale Colombian açai businesses and enterprises to meet the global demand for açai whilst also countering the threat of deforestation due to illegal activities. The projects are at different maturity levels and located in diverse geographies. P4F also funded an açai market analysis to shed light on

potential market demand and harvesting and volumes in the Pacific region. These concerted efforts build on the P4F-supported initiative to reform and operationalise Colombian NTFP-legislation to foster a strong productive environment for açai in Colombia.

Açai Production and Market Trends in the Colombian Pacific

Between 2022 and 2023, P4F funded a market study to understand the potential of açai production and development in Colombia's Pacific region. Given the unique context of expansive forests and rich biodiversity and the looming threat of deforestation, bioeconomy initiatives are imperative. The goal is to empower local communities by enabling them to generate sustainable incomes, ultimately reducing their reliance on and use of deforestation practices.

To address these challenges, P4F commissioned a market study to identify information gaps within the açai sector. This sought to equip local companies with the insights needed for them to thrive and compete against alternative economic activities in the Colombian Pacific. The study also explored other NTFPs that could be harvested and processed by the companies in tandem with açai, further diversifying their economic prospects.

5. PACÍFICO: DE LAS REGIONES MÁS BIODIVERSAS. Available at: <https://www.wwf.org.co/_donde_trabajamos_/pacifico/> .

6. Baltazar VI, Sandoval EA, Toledo MV. Investigación aplicada para el estudio del açai como cultivo alternativo en beneficio de las comunidades nativas de la selva baja del Perú . Universidad Esan. Lima. 2018.

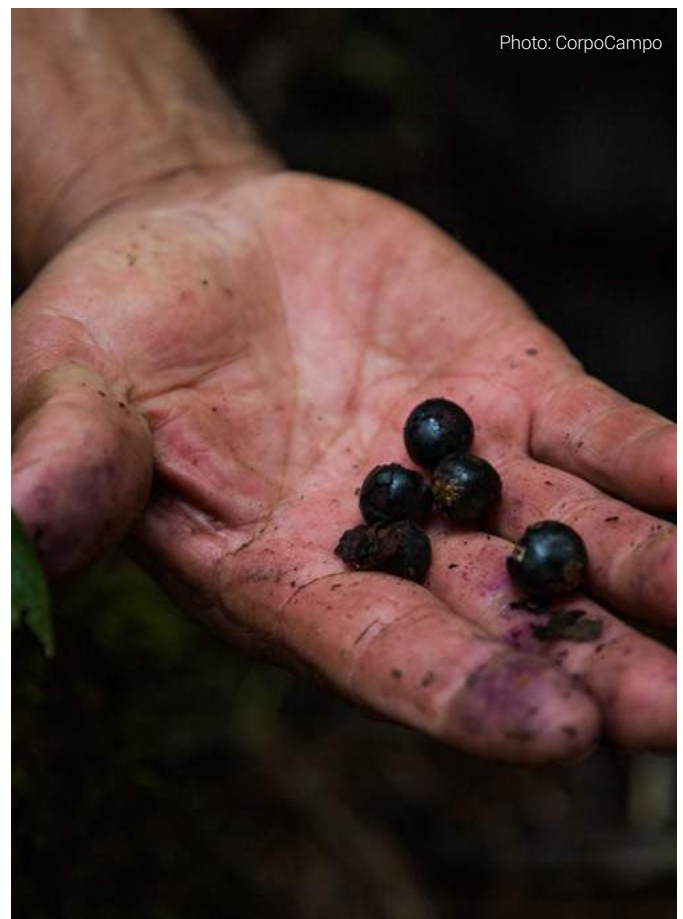


Photo: CorpoCampo

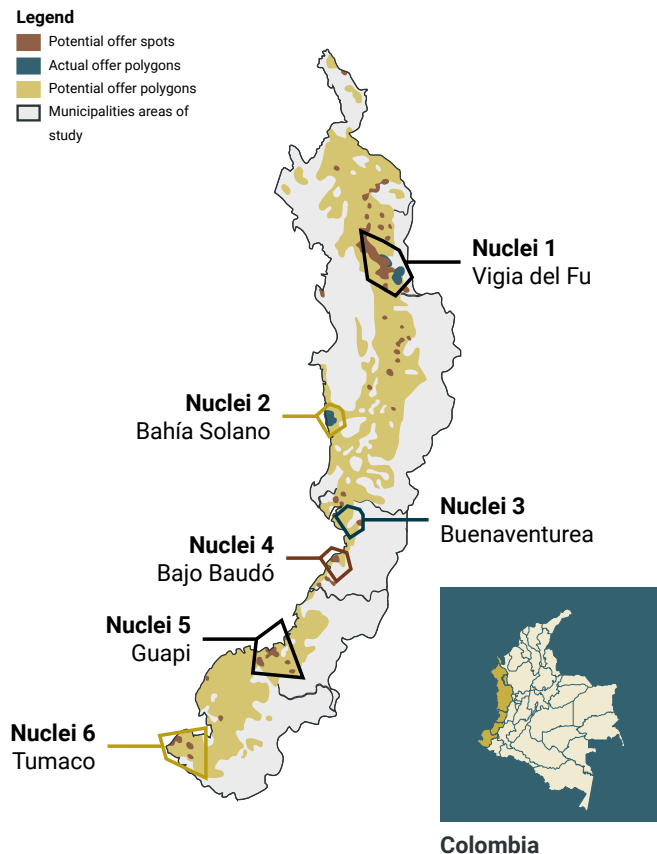
Açaí is transformed into value-added products by three major industries: food and beverage, cosmetics, and pharmaceuticals⁶. The açaí market is vast and growing, and surpasses the capacities of the main producer Brazil, resulting in a supply deficit.

Currently, Brazil is the global epicentre of açaí production, producing 99% of the world's açaí. However, the study identified that Brazil's production does not fully meet the continuously growing international demand, resulting in an estimated deficit of 1.1 million tons of fruit per year. This is an important opportunity for Colombia, the second largest global producer of açaí. However, with 6,100 tons annually the country currently contributes only around 0,4% of global açaí production.



Photo: CorpoCampo

Figure 1: Map of the six identified centres with açaí harvesting potential



As one of the outcomes of the study, it identified 6 nuclei areas where the harvest and processing of açaí has the potential to be carried out in the Pacific region. These centres were selected for their accessibility and proximity to secondary or primary roads. However, the potential for sustainable açaí production exceeds this area, with 2.3 million hectares suitable for production in the Colombian Pacific. The potential fruit production is estimated at up to 330,000 tons per hectare per year.

As the domestic market Colombia remains relatively unaware of açaí, resulting in limited local consumption, the report recommends focusing on the international market. Revenue and jobs generated from açaí pulp exports are expected to grow 30-fold in the next ten years.



Strengthening the açai value chain in Colombia



Naidiseros: Strengthening a local community enterprise

📍 **Cajambre River, Valle del Cauca Department – Pacific region**

The business

Established in 2015 by seven community councils⁷ in Valle del Cauca on the Pacific Coast, Sociedad Naidiseros del Pacifico SAS harvests, processes, and commercialises açai. The community councils, founders, and shareholders are legal representatives and landowners of the communal territory and aim to leverage açai as a key value chain for their region. Profits earned by Naidiseros SAS are reinvested in the community councils.

The project

In 2019, with support from P4F, Naidiseros scaled up its açai production pilot. This led to an increase in açai supply and pulp processing capacity. It improved community income by increasing sales and by unlocking funding from the Reducing Emissions from Deforestation and Forest Degradation (REDD) initiative, supported by the Colombian partner Fondo Acción. The project also made improvements in processing facilities and assets to increase fruit supply and refine operations.

Results

During the project, Naidiseros obtained a permit to wild harvest of 935 tons of açai, consolidating the supply chain and benefitting 150 families engaged in harvesting, transportation, and processing.

P4F support for Naidiseros' processing facility in Cajambre resulted in significant improvements. These included the provision of five depulping machines, a transportation boat, and two processing centres. Safety measures were put in place and a water treatment plant was established to ensure quality pulp and hygiene standards. Solar power was used to address energy shortages, and a pulp freezing room in Buenaventura increased storage capacity.

The marketing and sales strategies implemented by Naidiseros focused on emphasising the quality of açai. Collaboration with the UK Embassy and MUCHO, a communication

Photo: Project Archive



consultancy, resulted in a social media campaign reaching approximately 53,000 people. Market, product quality, portfolio, and target audience assessments were conducted. Social media channels and e-commerce options were put in place, and the company learned about competitive transportation and better understood client needs through commercial tours.

Sales for Naidiseros increased from £285 to £14.1k across the project's implementation. The company secured purchase commitments from boutique clients – small hotels and restaurants that offer high quality products – and 11 buying companies. Its processing capacity grew from 0.1 ton in 2018 to 13 tons of açai fruit by 2021.

7. Community Councils are the ethnic authority in charge of administering the Collective Territories of the black, Afro-Colombian, Raizal and Palenquero communities in Colombia. They are an organisation recognised by national public authorities and international entities.

In terms of conservation and sustainability, Naidiseros submitted harvesting permits for 400 hectares in Cajambre and, through another programme's support, committed to protect 58,052 hectares of tropical ecosystems through conservation agreements in the REDD+ projects for Cajambre, Concosta and Suvirú, Usuaraga, Piliza y Pizarro. In combination with these REDD+ initiatives, the project unlocked 469,859 Verified Carbon Units (VCU)⁸. All the VCUs were sold, contributing to forest and habitat protection in one of the world's ten biodiversity hotspots, including humid tropical forests, coastal estuaries, mangroves, and habitats for a host of endangered plants and animals. Three harvest permits were granted within five months of their submission. This fast response time is a successful outco-

me of a P4F-supported initiative to increase the technical capacity of local environmental authorities, aligned with 2021 Decree 690 (see box below).

After the P4F project ended in 2021, Naidiseros faced scaling challenges because conflict halted harvest and pulp production in their harvesting areas. However, Naidiseros' resilience and commitment to the açai business meant they recovered their operation and sold three tons of açai by 2023.

Naidiseros del Pacífico SAS, with P4F support, has both transformed its açai production capabilities and sales played a crucial role in community development, environmental conservation, and sustainability.

Removing policy barriers to the non-timber forest products market: Decree 690/2021

A significant obstacle to the expansion of Colombia's bioeconomy sector was the absence of specialised and inclusive regulations governing the sustainable harvesting of NTFPs. This resulted in an informal and unrecognised NTFP industry, holding rural communities and companies back from developing business plans and accessing the necessary capital.

In response to these challenges, Decree 690/2021 was enacted on June 24, 2021. The decree covers commodities harvested from Colombian wild flora, aiming to conserve renewable resources while respecting the customs of indigenous communities. It establishes a clear legal framework for individuals, associations, and businesses involved in the NTFP value chain.

P4F played a pivotal role in initiating a dialogue to support this new legal framework in late 2019, through the Unleashing NTFPs project. Challenges included a lack of detailed requirements and procedures for issuing permits, resulting in businesses waiting an average of two years. Regional

environmental authorities, responsible for issuing permits, faced capacity and information gaps. The project acted in four key areas: active consultation involving diverse stakeholders to refine the decree; development of technical procedures; creation of species-specific protocols; and fast-tracking implementation to showcase the framework's effectiveness.

One of the main outcomes is that the decree's pre-determined management protocols for six NTFP species, including açai, facilitates environmental authorities' assessments and so reduces the time they spend providing the permits. Training and workshops also developed the regional environmental authorities' technical capacity, especially in assessing permit requests. This comprehensive approach addressed regulatory deficiencies and fostered sustainable business practices in Colombia's bioeconomy.

The case study '[How policy and regulation can promote sustainable forest-focused businesses: supporting the development of a Colombian national bioeconomy](#)' describes the processes and main outcomes.

8. Verified Carbon Units (VCUs) are a type of carbon offset that represents a reduction or removal of greenhouse gas emissions. These units are verified and certified by an accredited standard or program, ensuring their legitimacy and adherence to specific criteria and methodologies for measuring, reporting, and verifying emissions reductions or removals.



Planeta:

Empowering Sustainable Harvesting and Business Growth

📍 Vigia del Fuerte, Antioquia – Pacific region

The business

Planeta is a private company that is owned, managed, and staffed by members of Afro-descendant communities that live in Vigia del Fuerte. The company purchases palm hearts (*palmitos*) from collectors, processes them, and sells them to clients. The company has nine shareholders who live in the Atrato region, which includes one of the most important of Colombia rivers. The region is heavily affected and contaminated by illegal mining.

The project

Between 2019 and 2020, Planeta received P4F scale-up support to enhance product quality, upgrade their processing plant, and obtain National Institute for the Surveillance of Medicines and Food (INVIMA) concept certification – necessary for sell açai pulp to businesses or consumers in Colombia. As a result, they achieved operational excellence and strengthened forest protection.

Results

Driven by its commitment to sustainable land use, Planeta has navigated a remarkable journey marked by strategic acquisition, infrastructure development, and a robust marketing and sales strategy. Recognising their dedication, environmental authorities granted harvesting permits that allocate the requested area for sustainable land use for three to ten years before renewal. By the end of the project, Planeta held three permits covering 39.8k hectares. P4F played a pivotal role in securing two of these new harvesting permits through the support provided by the Unleashing NTFPs project, which enabled a fast-track issuing of permits.

Planeta invested significantly in equipment, so pulp storage capacity increasing from 0.3 to 4.6 tons with the purchase of additional freezers. The plant's pulp processing capacity also increased, from 4.5 to 9.6 tons per month, due to a new palm-heart cooking system.

The plant's infrastructure was also improved. An electrical circuit that can meet the increased load of the new equipment and a contamination-protective furnace were instal-

Photo: Project Archive



led. Water management was optimised through the re-establishment of a rainwater treatment system, contributing to a 5% reduction in variable costs for palm heart compared to bagged water.

Internal processes and capacity have also been improved, with a focus on quality management through the development and implementation of registry forms, and training in Good Manufacturing Practices, internal processes, registry forms, and production manuals. Procurement manuals and committees were consolidated, ensuring a streamlined workflow.



Planeta obtained INVIMA Sanitary Concept certification, meeting the minimum sanitation standards required by most Colombian market players, and the mandatory electric standard certification for industrial establishments.

A comprehensive marketing and sales strategy was created, targeting four client profiles that align with Planeta's business model. These include açai bowl stores, stores that sell natural products, companies transforming açai pulp for export, and public sales entities implementing public-school nutrition plans. During project implementation, Planeta consolidated two major buyers for açai and palm hearts in Colombia: Crepes & Waffles, and Asec.

After P4F support ended, the COVID-19 pandemic meant that Planeta had to suspend operations, affecting cash flow and the company's economic projections. They survived these setbacks through sales of palm hearts to Crepes & Waffles. The pandemic also damaged assets and improper use affected production. To counter this, in 2023 P4F supported Planeta to repair the equipment and deliver additional training, which led to a significant increase in production to 10 tons. By 2024 Planeta was still managing to balance ecological responsibility with business growth.





Corpocampo: Transforming Açaí Processing and Sales with P4F Support

📍 Putumayo – Amazon region

The business

Corpocampo, the largest açaí processing and sales company in Colombia, is a local company that developed a successful business model around palm heart and açaí production. It was founded as a non-governmental organisation (NGO) in 2003 by Edgar Montenegro, an entrepreneur from Putumayo with a background in farming, who sold palm hearts with the support of a United States Agency for International Development (USAID) project. In 2007, Corpocampo started processing açaí and it has been a promising product within their portfolio ever since. Corpocampo supplies 72% of the domestic açaí market and 73% of Colombian exports. The company has now evolved into two distinct entities: Corpocampo NGO, which oversees the social and environmental compliance and the work with the local communities, and Amapuri, which is in charge of the businesses including sales, processing, marketing.

The project

Corpocampo underwent a transformative scale-up process in 2019, supported by P4F. The primary goals were to enhance the wild collection of açaí, work with third parties to establish agroforestry systems (AFSs) to supply Corpocampo on their land, ensure operational sustainability, and create a comprehensive marketing and sales strategy.

Results

Over 2,996 hectares were committed to sustainable use and protection through forest management plans and conservation agreements. The area incorporates both forest wild collection sites, situated on farmers' land, and 996 hectares of agroforestry land that were provided to farmers. Harvesting permits for over 2,000 hectares of açaí-rich forests were requested and received after the project ended. The project marked a significant operational shift for Corpocampo, which did not previously have açaí AFS and so relied on wild collection in forests. This transformation allowed the company to reduce harvesting costs and to closely monitor the harvest and reproduction cycles of the açaí palm.

Photo: CorpoCampo



A total of 170 people benefitted from açaí harvesting, including indigenous Inga and Alpamanga communities and ex-combatants from the peace process in Colombia. They received training to install AFS covering 215 hectares, engaging them in the production of açaí, palm heart, copoazú, and camu-camu. Corpocampo signed ten off-take commitments with the communities, providing them with income security and committing them to zero-deforestation and compliance with Colombian law. Corpocampo also signed 31 contracts for wild collection with producers, based on the management plan developed under the project which set out the maximum annual harvest.

The collaboration between Corpocampo and P4F has propelled sustainable sourcing and community engagement and has positioned the company for long-term success through environmentally conscious practices and enhanced operational capacity. The project represents a significant step towards ecological responsibility and the professionalisation of açaí commercialisation in Colombia.

Açaí value chain change in Colombia after P4F's interventions

Corpocampo, Planeta, and Naidiseros were at different stages of business maturity when P4F started working with them. Corpocampo needed support for to scale-up, while the other two companies needed support to consolidate their business cases and production.

P4F support to improve the açaí value chain focused on:

- **Securing harvesting permits by demonstrating commitments to sustainable practices, and forest protection:**

this was an issue for all initiatives and was helped by the outcomes of the Unleashing NTFPs project, that culminated in the Policy Decree 690, generated favourable conditions for the commercialisation of NTFPs, normative regulation, and national inventory. The standardised permit process streamlined paperwork, simplifying the application process. The decree also defined responsibilities and sustainable harvesting types, promoting the responsible use of natural resources.

- **Enhancing operational capacities to drive increased production:**

a shared achievement across the initiatives is the consolidation business models, marked by significant operational improvement for Planeta and Naidiseros. Strengthening storage and freezing capacity and ensuring a constant electricity supply improved both companies' operational capabilities and allowed them to respond to higher demand for açaí. Between 2019 to 2021, Naidiseros increased its fruit harvesting from 0.3 to 30 tons and its pulp processing from 0.1 to 13 tons. The company also achieved £14.1k in revenue from sales, which is a significant increase from £285 in 2018. Planeta also increased its pulp storage capacity from 0.3 tons to 4.6 tons through freezers and a new cooking system that increased the productive capacity of palm heart from 4.5 to 9.6 tons a month. This allowed them to sustain their commercial relationship with Crepes & Waffles, one of the main restaurant chains in Colombia.

- **Sharing best practices:**

in September 2019, P4F organised an 'Açaí week' in Pará state, Brazil, bringing

together five representatives of Naidiseros and local communities. The initiative provided a first-hand experience of successful açaí businesses, fostering knowledge exchange, networking opportunities, and laying the foundation for the sustainable growth of these enterprises.

- **Obtaining sanitary certification:** the project supported Planeta and Naidiseros to obtain INVIMA Sanitary Concept certification, which is the minimum sanitation standard required by most national market players. Having this certification changed their market position by expanding the type of clients they can sell to, making scaling up is more feasible.

- **Improving açaí agroforestry practices:**

Corpocampo implemented an AFS, which gave them greater certainty about harvesting cycles and allowed them to concentrate harvesting in one area. This is more efficient than wild collection, which takes place across a vast area and often takes more time in transportation and selecting palms that are suitable for harvest. AFSs with açaí led to a huge change in the way Corpocampo operates by supporting the company to reduce costs related to harvesting (going from/to açaí harvesting area in the forest) and acquiring knowledge about the harvesting season.

- **Identifying the market and supply potential of açaí from the Pacific region:**


the market study on Pacific açaí offers valuable insights for communities in the region. It serves as a guide, showcasing the profitability of sustainable açaí harvesting, emphasising the dual benefit of fostering profitable business and contributing to forest conservation. This assessment identified a market gap that Colombian açaí can effectively fill and projected potential profits. For policymakers and decision-makers, the study's findings highlight a business model that prioritises forest preservation and catalyses development within the impoverished and underdeveloped Pacific zone. By presenting potential profit, job creation, and tax contributions, the study provides accurate and comprehensive information on the value chain's potential impact and significance.

Lessons learned

• **Tailoring support for specific business maturity levels provides flexibility and allows focus on the most transformational aspects:** identification of business' maturity was crucial for Corpocampo. It led to a focus on innovative solutions to challenges such as organising and planning harvests with local communities and dealing with scattered açai trees, which made harvesting costly in terms of finance and time. The less mature businesses, Naidiseros and Planeta, needed clarity about their business, their strengths, and what could be improved to scale up. This involved understanding their capacity and needs and preparing them to expand production.

• **Understand systemic barriers is key in effective project implementation:** all P4F-supported açai initiatives faced challenges in diverse landscapes, with a common security threat from the presence of illegal armed groups and illicit activities like coca cultivation and mining. This required careful planning and coordination in remote areas, involving constant communication with companies and communities to clarify project scope and objectives.

• **Comprehensive empowerment of local communities to increase their income and disincentivise deforestation is a core part of the projects' theory of change:** local communities in remote areas with limited access to basic services – including farmers, indigenous groups, and African-descendant communities – were the main beneficiaries of all three projects. Their involvement required careful consideration of their unique needs, living conditions, and roles – particularly in açai harvesting. As key players, and often the landowners, they should always be involved in the project's planning and development. Transparent information on their role, earnings, and purchase agreements is crucial, necessitating clear figures on prices and purchase conditions, accompanied by consistent training on harvesting and fruit quality. Coordinating efforts, such as transportation, reduces fuel costs that may affect the final price of the fruit. Interventions with the three companies showed that P4F's theory of change – improving the communities' income as a disincentive for deforestation – is viable through inputs such as training, contracts, and clear purchase agreements. Recognising the pivotal role of local companies is essential to the functioning and sustainability of the value chain, directly impacting the longevity of community harvesting activities. While involving communities is essential, the success of these initiatives depends on strengthening local enterprises and ensuring profitability beyond project and donor support.



- **An inclusive process is key to a positive outcome:** engaging multiple stakeholders in a systemic approach is vital for a successful intervention. Workshops were conducted with environmental authorities, NGOs, national authorities, and local communities to identify gaps and key aspects around harvesting NTFPs that the decree needed to address. The private sector, represented by the National Association of Business, also played a role in the planning and design of the decree, ensuring a comprehensive approach. Identifying the political window of opportunity for the decree's approval was key, and required liaising with the Colombian President, the Ministry of Environment, Local Environmental Authorities, and NGOs to secure approval.

- **Gathering data on NTFPs requires a comprehensive and innovate approach:** non-compiled data, like açai areas and volume estimates, posed challenges. Leveraging information systems and cross-referencing secondary data was crucial and field verification in potential areas ensured study accuracy. Harnessing local knowledge held by Corpocampo, Naidiseros, and Planeta was vital. Sharing results widely was pivotal for the market study's usefulness. An event inviting public and private sectors stakeholders, donors, and impact investors to disseminate impactful results was held as part of the strategy.

This case study was developed by Partnerships for Forests in Latin America, in collaboration with the Monitoring and Evaluation global team

Marcio Sztutman

Regional Director

Iara Basso

Regional Manager

Monica Souza

Results Manager

Alejandra Medina

Investment Associate

Isabella Granero

Monitoring,

Evaluation and

Learning

Birte Kurbjweit

*Monitoring, Evaluation
and Learning*

Martin Belcher

*Monitoring, Evaluation
and Learning*

Design

Estúdio Utópika



Partnerships for
Forests



UK Government



Palladium
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