Chocolat Xingu 2022

O Cacau No Brasil e No Mundo

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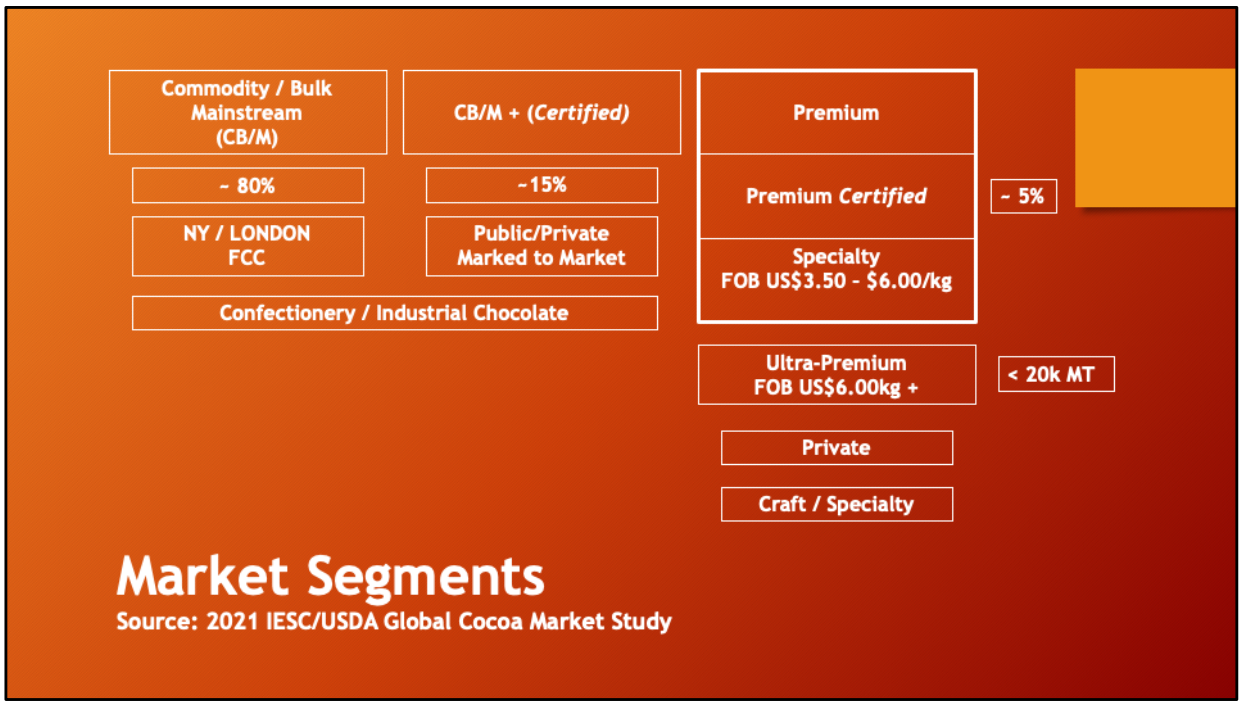

This is an overview of how the international cacao markets are structured.
Three main market segments, one with three sub-segments
How are they characterized
Who are the customers
How much of the market is represented by each segment?

Country	2016 Total production	2019 Total production	± % 2016-2019	ICCO 2020 ('15) %FF EXP
Ivory Coast	1,634,000	2,180,000	+33%	–
Ghana	858,720	811,700	-5%	–
Indonesia	656,817	783,978	+19%	10% (1%)
Nigeria	298,029	350,146	+17%	–
Ecuador	177,551	283,680	+60%	75% (n/c)
Cameroon	211,000	280,000	+33%	–
Brazil	213,871	259,425	+21%	100% (0%)
Peru	107,922	138,928	+26%	75% (n/c)
Colombia	56,785	102,154	+80%	95% (n/c)
Dominican Republic	81,246	88,961	+9%	40% (n/c)

Global Production

Source: 2021 IESC/USDA Global Cocoa Market Study
2021 Harvest ~ 5.5 million MT (ICCO)

One purpose of this slide is to show how global production changed between 2016 and 2019.
Which countries grew in production, and which did not.
Brazil was #1 in the world in the late 1980s before the introduction of witches broom.
After 30 years it is back in the top 10.
We compare and contrast this with how the export crop is characterized by ICCO – what percent is fine and flavor cacao?

Is some government support necessary?
If so, what kind?
(See the next slide.)

Country	2016 Total production	2019 Total production	± % 2016-2019	ICCO 2020 ('15) %FF EXP
Ivory Coast ('06 1,408,854)	1,634,000	2,180,000	+33%	–
Ghana	858,720	811,700	-5%	–
Indonesia	656,817	783,978	+19%	10% (1%)
Nigeria	298,029	350,146	+17%	–
Ecuador ('06, 85,671)	177,551	283,680	+60%	75% (n/c)
Cameroon	211,000	280,000	+33%	–
Brazil ('06, 212,270)	213,871	259,425	+21%	100% (0%)
Perú ('06, 31,676)	107,922	138,928	+26%	75% (n/c)
Colombia ('06, 35,258)	56,785	102,154	+80%	95% (n/c)
Dominican Republic	81,246	88,961	+9%	40% (n/c)

(Some) Effects of Government Support

Sources: Clay Gordon personal research, IESC/USDA 2021 Global Cocoa Study, FAOSTAT (2006 numbers) / ICCO / ANECACAO / AIPC

This table shows the top 10 countries – it is a near duplicate of the previous table with three exceptions – the countries highlighted with arrows.
We will discuss some aspects of government support that led to these statistics
Note that four of the countries I was able to find 2006 production statistics, for further comparison.
Total cocoa bean exports from Brasil in 2019 were ~500MT ; 2020 630 MT (~25 40ft containers) (Source AIPC)

2025 legislation regarding deforestation … Who pays? How does it affect price competitiveness?
Who is the customer? Barry Callebaut and Cargill here in Brazil? Their export customers? It's not the end consumer, only a small percentage of consumers care.
Reduce importation to zero?
Become a net exporter?

***Key Idea**: Quality May Not Affect Price*

Is the key to success in international markets not doing business the old-fashioned way?

Flavor makes the difference.

Perguntas?
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