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APRESENTADO POR
 GOVERNO DE
SANTA CATARINA



SANTA CATARINA: A STATE AHEAD

Safety, competitiveness, quality of life, record job creation: A unique combination makes Santa Catarina a champion state in attracting investors, tourists, and residents



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The safest state in Brazil
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GOVERNO DE
SANTA CATARINA
SECRETARIA DO TURISMO

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DANIEL ZIMMERMANN



RICARDO WOLFFENBÜTTEL

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Connection between Santa Catarina Island and the mainland: Strong economy

LEANDRO FONSECA

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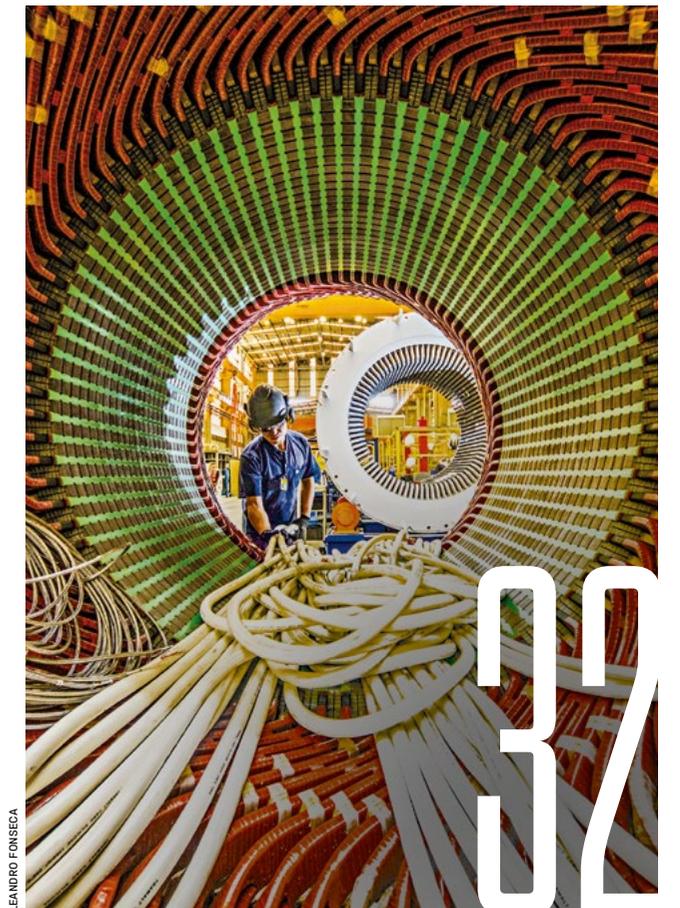
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COVER/ILLUSTRATION: CATARINA BESSELL

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Industry: If it were a nation, the state would
boast the lowest unemployment rate in the OECD

THE LEADING ROLE OF SANTA CATARINA

FROM ECONOMIC COMPETITIVENESS TO QUALITY OF LIFE, THE EVIDENCE IS CLEAR:
DESPITE OCCUPYING JUST 1% OF THE BRAZILIAN TERRITORY, SANTA CATARINA
REMAINS FAR AHEAD OF THE COMPETITION.

AS THE NATION'S SAFEST STATE AND A TOP DESTINATION FOR ARGENTINE TOURISTS, SANTA CATARINA ALSO ATTRACTS THE HIGHEST NUMBER OF NEW RESIDENTS. The champion in cooperatives. And in life expectancy. Boasting the lowest unemployment rate in the world, it features some of the largest Brazilian companies. Home to national landmarks ranging from pristine beaches and award-winning wineries to world-class theme parks. Also, the most efficient ports in Brazil. All of this while occupying only 1% of the national territory. There are plenty of reasons to show why Santa Catarina is ahead of the curve, as demonstrated on the cover of this special magazine.

EXAME has a special connection with the state, hosting our sole branch office outside of São Paulo. In a series of special reports in this edition, we expand on the facts and stories we tell every day in reports focused on innovation and entrepreneurship. They highlight a state connected to its roots, shaped by Portuguese, German, and Italian immigration. They also demonstrate an innovative and dynamic state, with the United States as its main export destination, a testament to the quality of its products and services.

They also reveal a state that is a champion of decentralization,

with six regions excelling in industry, services, innovation, and tourism. "The result is an environment where competitiveness does not depend on a single, hegemonic hub, but on the sum of its parts," states one of the reports. "Santa Catarina has established a framework that minimizes the impact of abrupt cycles, relying instead on the stability of diversification and predictability." These attributes have secured an escalating leading role for the state amidst a landscape of significant transformation, both in Brazil and abroad. Enjoy your reading! ●

A STATE AHEAD OF THE CURVE

SANTA CATARINA COMBINES QUALITY OF LIFE WITH INVESTMENT APPEAL. IT ATTRACTS RESIDENTS, CREATES OPPORTUNITIES, AND BECOMES A GLOBAL HIGHLIGHT

LUCIANO MANENTI



LEANDRO FONSECA

A SENSE OF CHARM AND ENCHANTMENT HAS LONG BEEN AT THE HEART OF SANTA CATARINA'S BRAND. This may stem from the beautiful composition of landscapes, where pristine beaches meet mountains, or its social indicators, which consistently outperform the national average, or an economy that has given rise to some of the most iconic and successful Brazilian brands in recent history. This symbolic capital, however, for a long time functioned more as a historical attribute than as an asset with transformative potential for the future. Santa Catarina

was seen as a good place to live and produce, but rarely as a clear project for nationwide economic leadership.

But that game has changed. What is different now is the willingness of the people of Santa Catarina to go further—and establish a prominent position in terms of the state's economic edge and potential to attract investment and thrive in competition that is not only national, but global.

Historically, the state has always had an economic weight greater than its size: It is only the tenth in population but has the sixth largest state GDP.

View of the bridges connecting Santa Catarina Island to the mainland: Balance between the capital and the countryside strengthens the state's economy

In recent years, Santa Catarina has been making an effort to become as competitive as, or even more competitive than, São Paulo (the country's largest economy) and to build an internationally recognized brand (as Rio de Janeiro still is)—but without incurring problems such as lack of security and unsolvable mobility issues.

This is a rare ambition in the Brazilian context: To grow without reproducing the social and urban costs normally associated with scale. Instead of betting on megacities or concentrated projects, Santa Catarina is betting on a distributed model, based on medium-sized cities, functional infrastructure, and productive diversification.

'Santa Catarina does not have the social problems of other regions, including large metropolitan areas, and this directly influences the investment decisions that companies and investors need to make,' says Pablo Bittencourt, Chief Economist of the Federation of Industries of the State of Santa Catarina (Fiesc). In other words, the state does everything possible to shine.

One indicator that this ambition is beginning to bear fruit is the State Competitiveness Ranking, prepared annually by the Center for Public Leadership (Centro de Liderança Pública, CLP) to measure the capacity of federative units to generate well-being for the population. Santa Catarina has held the second position on this list since 2016 but in recent years the gap relative to São Paulo, which is the leader, is closing.

From 2024 to 2025, Santa Catarina maintained its first-place ranking in Public Safety and Human Capital. Last year, the state also ranked second in Innovation and Social Sustainability, and third in Market Potential, where it climbed seven positions compared to 2024.

These rankings are relevant not only as a statistical snapshot, but because they reflect decisions accumulated over time—many of them administrative, technical, and not very visible—that shape the business environment and quality of life in a lasting way.

Other more recent figures also show the results of a collective effort to improve the business environment in Santa Catarina. Since the Pandemic, the state's economy has grown above the national average. The Planning Secretariat estimates that Santa Catarina's GDP grew by 5.2% in 2024 (compared to a 3.4% increase in Brazil) and by another 4.5% in 2025, while the country's growth is projected at a modest 2.25%. The state has become a factory

COMPETITIVENESS

for new businesses. 278,000 new businesses were opened in 2025—the highest number in a decade. More than just an episodic entrepreneurial surge, this movement indicates structural confidence in the local economic environment. Companies tend to emerge—and endure—where rules are predictable, the consumer market is solid, and there is workforce available.

These positive results are due to a combination of attitudes that should be obvious, although Brazilian history shows how rare they have been: Improving what can be improved and not ruining what works well.

In fact, part of Santa Catarina’s recent success can be attributed to a good foundation—which is directly linked to productive diversification. Unlike states that are excessively dependent on a single sector—such as commodities, public services, or consumption—the economy of Santa Catarina relies on a relatively well-balanced tripod of industry, services, and agriculture, which dilutes risks and increases the capacity to adapt to external shocks. ‘The most important thing for investment in Santa Catarina, or for maintaining the investment cycle, is the presence of a diversified productive structure,’ says Bittencourt, from Fiesc. ‘This not only allows us to take advantage of different economic situations but also encourages the presence of nearby suppliers and customers, forming a critical mass that promotes new industrial investments’.

This critical mass creates a self-reinforcing effect: Companies attract suppliers, suppliers attract new investments, and the labor market continuously improves its skills, raising the state’s average productivity.

Industry remains one of the main pillars. The state maintains one of the most diversified industrial bases in the country, with particular emphasis on food and beverages, metalworking, machinery and equipment, textiles, ceramics, furniture, and chemical products.

In several of these segments, Santa Catarina holds leading national positions in terms of its share of the value of industrial transformation and exports, supported by dense production chains, qualified human capital aided by a robust network of technical schools, and strong integration with research centers and universities.

This close relationship between industry, technical training, and applied research helps explain why the state has managed to remain competitive even during periods of currency appreciation, high interest rates, and countrywide economic slowdown.

Agriculture plays a role that goes far beyond primary production. Good grain harvests and the performance of the animal protein industry—especially poultry and swine—continue to exert a strong multiplier effect on the food, transporta-



Beto Carrero World, in Penha [SC]: The state has the potential to generate companies capable of competing for top positions in their sectors

tion, and service economy. During periods of industrial slowdown, agribusiness acts as a cyclical buffer, sustaining employment, income, and exports in various regions of the state.

The service sector, in turn, has ceased to be merely complementary. Logistics services, information technology, engineering, healthcare, private education, and tourism have advanced consistently in recent years, keeping pace with income growth and the formalization of the labor market. Even in an environment of high interest rates, the volume of services in the state grew by 5% in the last 12 months, above the domestic market average of 3.1%, reflecting the greater dynamism of the local economy and the robustness of domestic demand.

This diversity is clearly evident in foreign trade. Santa Catarina exported roughly 11.7 billion dollars in 2024, with a relatively unconcentrated export portfolio and a presence in dozens of international markets. The balance between industrial products, agro-industrial goods, and higher added value products reduces vulnerability to price fluctuations or specific shocks in global demand.

Behind all of this lies a substantial capacity for renewal without losing a certain vocation for generating businesses capable of competing for leadership in their sectors. Ten or twenty years ago, a list of the main companies in Santa Catarina would have included names like Weg and Tupy, from the metalworking sector; Hering in the textile industry; Sadia and Perdigão in food production; and the Beto Carrero World theme park. Many of these brands remain strong in the market, even though they have undergone structural and corporate transformations. Some, like

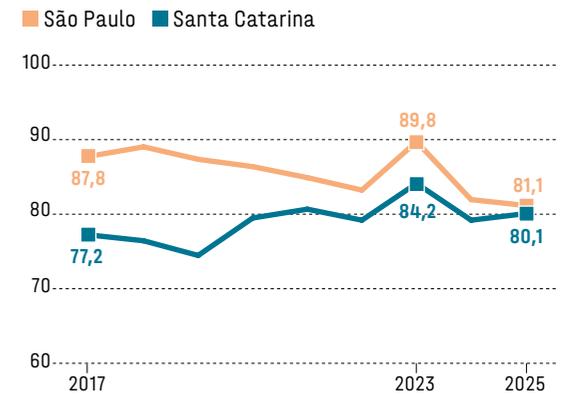
MARKET LEADERSHIP

Santa Catarina has been the second most competitive state in the country for nine years, according to the annual ranking by the Center for Public Leadership (CLP).

| Ranking of the most competitive Brazilian states 2025 | State |
|---|-------------------|
| 1 st | São Paulo |
| 2 nd | Santa Catarina |
| 3 rd | Paraná |
| 4 th | Distrito Federal |
| 5 th | Rio Grande do Sul |

According to the ranking criteria, the gap between Santa Catarina and the top-ranked team is getting smaller and smaller.

State competitiveness index, according to the CLP



| Among the items that make up the competitiveness ranking, Santa Catarina stands out in: | Rank | Item |
|---|-----------------|-------------------------|
| | 1 st | Capital Humano |
| | 1 st | Segurança Pública |
| | 2 nd | Inovação |
| | 2 nd | Sustentabilidade Social |
| | 3 rd | Potencial de Mercado |

Source: CLP.

Weg and Tupy, have delved into highly successful internationalization processes.

Today, they share space with younger companies, born in an environment of innovation, technology and advanced services—a clear sign of renewal in the productive fabric—such as software manufacturers, logistics companies and the construction companies that have made Balneário Camboriú the most vertical city in the country, with its skyscrapers that exceed 200 meters in height. And there is already a new generation of companies born in the 21st century with roots in innovation and technology that are consolidating their brands, many of which have a global vocation.

‘There is a very strong enterprising spirit in the state, closely linked to its historical formation and immigration,’ says Diego Ramos, President of the Santa Catarina Technology Association (Acate).

The resilience of the people of Santa Catarina, therefore, is not the result of chance or an isolated

COMPETITIVENESS

favorable circumstance. It results from an economy that distributes risks, combines traditional and modern sectors and transforms productive diversity into stability—a rare attribute in a country historically marked by extreme cycles.

Part of the positive results is due to a recent effort to improve and modernize the infrastructure, which for a long time was one of the state's main bottlenecks. It started with the ports. Today, two of the three largest container terminals in the country are located in Santa Catarina, and some of the best, as shown by the efficiency indicators of the National Agency for Waterway Transportation (Antaq).

Another emblematic case is that of highways. In just a few years, Santa Catarina has experienced a historic shift in the quality of its road network. The state is investing over 5.1 billion reais in state highways, which, added to 1.45 billion reais in maintenance and conservation, reduces travel time, logistics costs, and operational risks for companies.

More important than the volume of work was the institutional change. Through InvestSC, the government of Santa Catarina structured the first public-

Innovation Center in Santa Catarina:
A new generation of businesses in formation



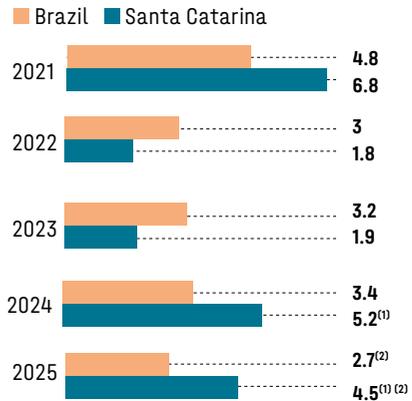
JONATÁ ROCHA/SECOM

THE ATTRACTIONS OF SANTA CATARINA

What makes the state a promising destination for companies, investors and professionals

1. Above-average growth

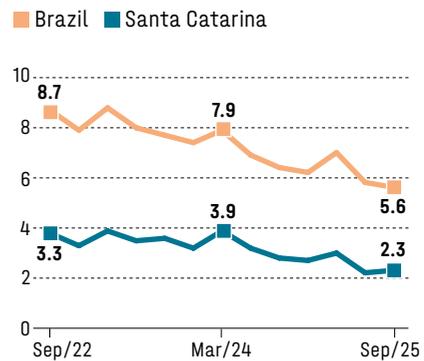
In three of the last five years, the economy of Santa Catarina grew more than that of Brazil (annual GDP variation, in %)



2. Heated labor market

Santa Catarina has the lowest unemployment rate in Brazil—comparable to that of the most developed countries

Unemployment rate, in % of the economically active population



In the 3rd quarter of 2025, unemployment in Santa Catarina was lower than the average of OECD (5%), Japan (2.4%) and South Korea (2.7%)

HIGH FORMALITY

73% of the workers of SC are formally employed (the highest percentage in the country)

FEW 'NEITHER-NOR'

11% of young people aged 15 to 29 from Santa Catarina neither work nor study (the lowest percentage in the country)

3. Quality of life

Compared to other Brazilian states, SC has...

...the lowest robbery rate:

73.5/100,000 inhabitants

...the second lowest rate of violent deaths:

8.5/100,000 inhabitants

99.7%

of the municipalities in Santa Catarina have fiber-optic broadband access, marking the second-highest coverage rate in Brazil

4. Low inequality

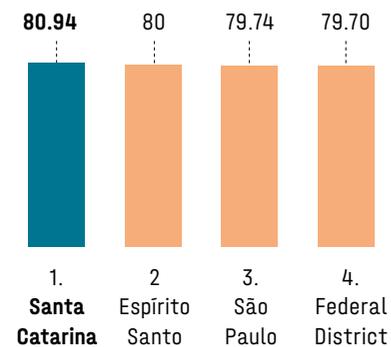
Only 1.65%

of the households in the state have family per capita income below the poverty line (the lowest percentage in Brazil)

5. Life expectancy

SC is the only state in Brazil in which life expectancy at birth is over 80 years—a longer life expectancy than in the United States, where the average is 79.61 years

Life expectancy at birth, in years



(1) Estimates from the Planning Department of Santa Catarina. (2) 12 months ending in September 2025. Sources: IBGE, Seplan, OECD.



LEANDRO FONSECA

-private partnerships throughout its history, inaugurating a new model for project execution. The first project was the Jaguaruna Airport, followed by the contract for dredging Babitonga Bay. More recently, the state auctioned off a public-private partnership (PPP) in search of a company to maintain and manage a prison complex in Blumenau. Among the upcoming initiatives is the launch of a public-private partnership to build and operate the Imbituba Export Processing Zone—a project that has been in the works for about 40 years and is only now showing signs of being put into practice. 'What sets Santa Catarina apart is that projects don't just stay in the announcement phase,' says Renato Lacerda, President of InvestSC.

In this business environment, social indicators remain strongly positive. The state is operating close to full employment. In the third quarter of 2025, the

Oxford factory in Pomerode [SC]: Industry is one of Santa Catarina's economic pillars

COMPETITIVENESS

unemployment rate was 2.3%, the lowest in Brazil — and lower than that of practically all members of the Organization for Economic Cooperation and Development (OECD), which brings together the most developed countries. At the end of the third quarter of 2025, 97.6% of the workforce in Santa Catarina was employed—a level more common in developed economies than in emerging markets.

More revealing than the number of jobs is its quality. Nearly 88% of private sector workers have formal employment contracts, the highest percentage among Brazilian states, while the informal employment rate has fallen to 24.9%, well below the national average.

Income follows this performance. The average monthly income reached 4.199 reais, the second highest in the country, after a growth of 10.1% in just one year. The state's monthly payroll reached 18.5 billion reais, increasing by almost 11% in the same period. Practically speaking, this means mid-sized cities with bustling trade, vibrant services, and a revenue base that is less vulnerable to global economic shifts.

Bobbin lace maker: The state has one foot in tradition and the other in the future

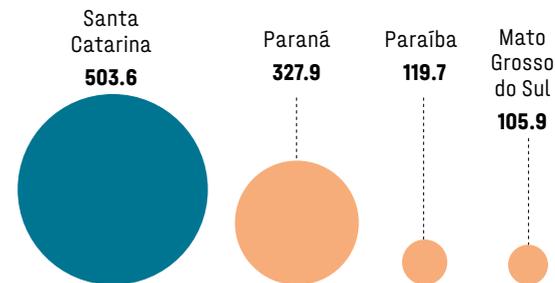


JONATÁ ROCHA/SECOMGOVSC

THE OUTCOME OF THESE FACTORS

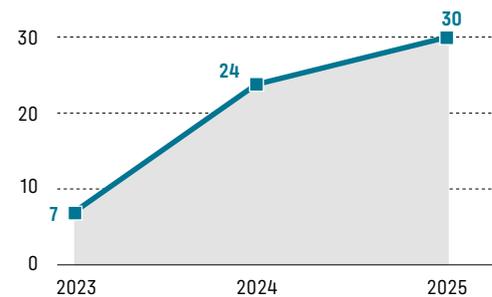
SC is the state that attracts the most people from other Brazilian regions

Interstate migration inflows by state from 2017 to 2022 (in thousands of immigrants)



The state capital, Florianópolis, ranked as the world's second-tier global hub for digital nomads in 2025, outpaced only by Dubai. The city hosted 5,666 entrepreneurs and remote professionals

Projected investment in the state has more than quadrupled over the past three years (in billions of reais)



Sources: IBGE, Dashboard, Invest SC.

Low unemployment, high income, an elevated level of formal employment, and quality of life indicators above the Brazilian average help explain why Santa Catarina has become, in recent years, the preferred destination for many Brazilians. According to data from the 2022 Demographic Census by IBGE (Brazilian Institute of Geography and Statistics), the state recorded the highest interstate migration balance in the country, with approximately 350,000 more people entering than leaving over the last decade. The result placed Santa Catarina ahead of other states that traditionally receive migrants, such as São Paulo and Minas Gerais.



LEO MUNHOZ

Itapema Beach: Located between Balneário Camboriú and Porto Belo, it stands out for its extensive coastline and complete infrastructure

Santa Catarina offers these cohorts a compelling value proposition. The state has one of the lowest housing deficits in Brazil, with only 7.3% of families living in precarious housing, below the national average. The safety indicators are also among the best in the country.

Overall, Santa Catarina offers an unusual combination in Brazil: Sustained economic growth, functional institutions, and measurable quality of life. Not all challenges have been eliminated—urban pressure, demand for skilled labor, and the need to maintain fiscal discipline remain on the horizon.

Structural changes in the global economy caused by advances in technologies such as Artificial Intel-

ligence and growing geopolitical risks are set to, once again, test Santa Catarina's ability to adapt. The need for investment in healthcare, education, and infrastructure is also growing in a country with historical shortcomings like Brazil. So far, however, the state has managed to do well in the face of adverse cycles. In a country accustomed to intermittent progress, Santa Catarina stands out for its consistency. And that is what could keep it on track for more prominent positions on the Brazilian economic landscape. ●



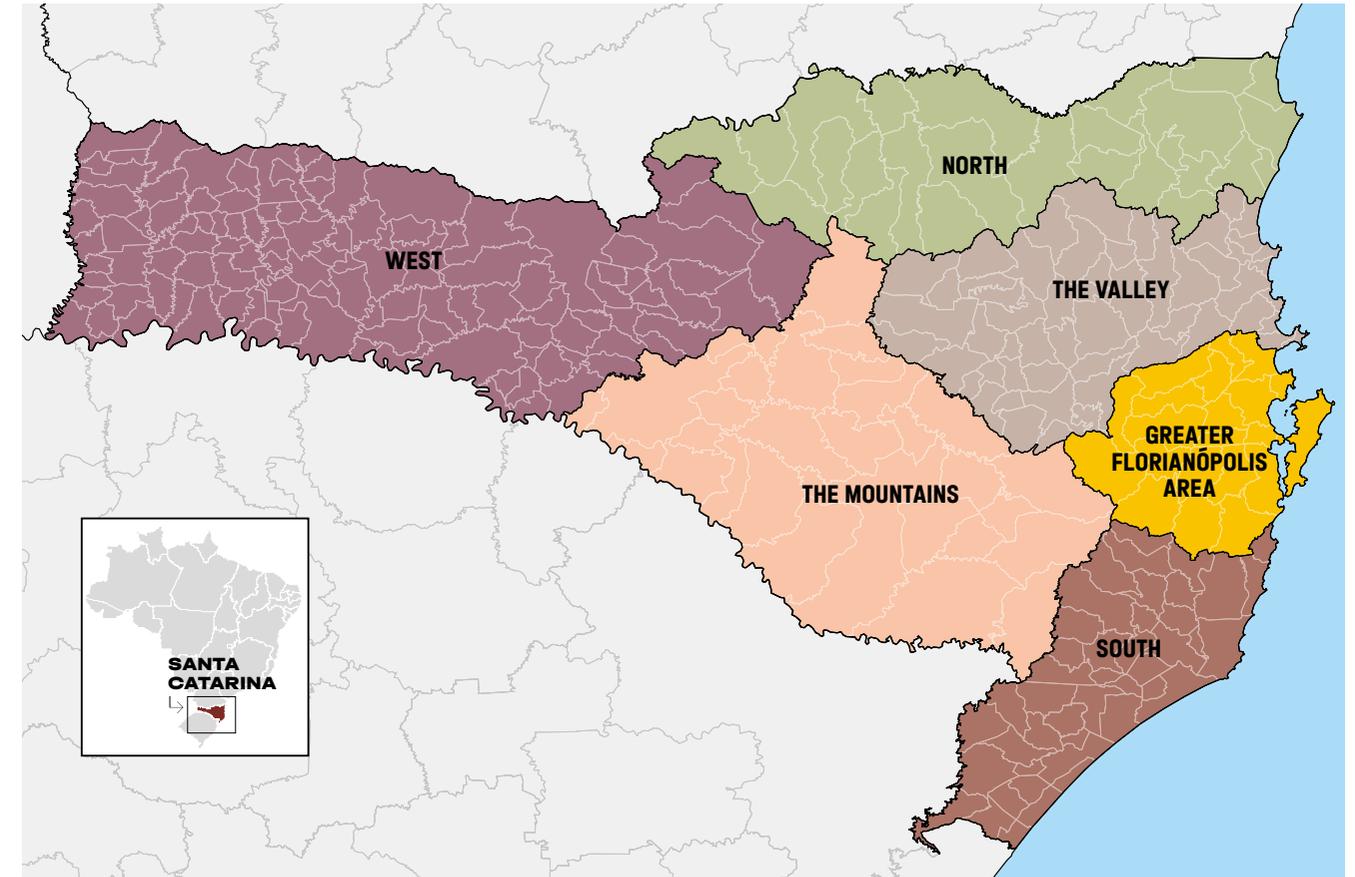
LANDSCAPE OF OPPORTUNITIES

SANTA CATARINA HAS 21 MICROREGIONS, AND SEVEN MAJOR CITIES THAT DRIVE ECONOMY AND OPPORTUNITIES

LUCIANO MANENTI

Florianópolis Airport: Direct flights to Europe and change in tourist profile

DIVERSIFIED STRENGTHS



LEANDRO FONSECA

SANTA CATARINA, ALTHOUGH OCCUPYING ONLY 1% OF THE NATIONAL TERRITORY in area, is great in economic diversity. Each of its regions—and its hub cities—has developed its own unique character, shaped by its history, geography, immigration, and productive foundation. The industrial North, the logistics Valley, the Mountains region that combines agriculture, tourism and innovation, the agro-industrial West, the reinventing South, and the technology driven capital form a mosaic where growth is not driven by a single engine, but by many operating in tandem. This diversity, however, does not mean fragmentation. While listening to mayors, business owners, and local leaders for this report, common patterns emerge. In virtually all the municipalities analyzed, there was some degree of selective reduction of the Municipal Service Tax (ISS) to stimulate strategic sectors, support programs for startups and new entrepreneurs, investments in innovation centers or districts, and efforts to shorten bureaucracy and accelerate the opening of businesses. To a greater or lesser extent, cities began to compete



GREATER FLORIANÓPOLIS

In recent decades, the rise of a technology hub has gained momentum in the economy, alongside traditional tourism-related activities

MAIN CITIES: Florianópolis, São José e Palhoça

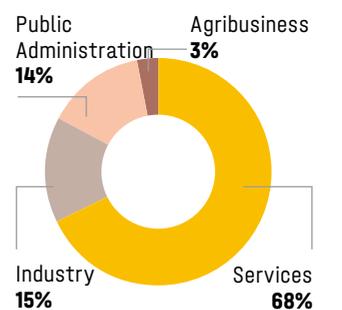
REGION GDP: 56.8 billion reais

POPULATION: 1.43 million

GDP PER CAPITA: 46.400 reais

MAIN COMPANIES FROM THE REGION
Engie (energy), Koerich (retail), and Intelbras (technology/telecommunications)

PARTICIPATION OF ECONOMIC ACTIVITIES IN GDP



LANDSCAPE OF OPPORTUNITIES

not just for factories or logistics warehouses, but for talent, intellectual capital, and long-term projects.

The result is an environment where competitiveness does not depend on a single, hegemonic hub, but on the sum of its parts. The strength of one region fuels opportunities in another; production chains connect; specialized services emerge from local demands and gain national reach. Santa Catarina has established a framework that minimizes the impact of abrupt cycles, relying instead on the stability of diversification and predictability.

The challenge going forward is to preserve this rare combination: Growing without sacrificing quality of life, attracting investment without compromising public finances, and advancing innovation without disrupting the core principles that underpin the real economy. Should it sustain this structural balance, the state will possess more than a landscape of opportunities—it will have a definitive roadmap for future growth.

FLORIANÓPOLIS—OPEN-AIR INNOVATION

Florianópolis functions today as an open-air innovation laboratory—a concept that Mayor Topázio Neto often repeats whenever he describes the city’s strategy. A concrete example is that of Sinapp, a local company that evaluated a robot-based solution for mapping underground infrastructure in sewage and rainwater drainage systems. Technology allows for the identification of faults and irregular connections without major physical interventions, reducing costs, construction time, and urban impacts. ‘We test solutions in the city before scaling them up. Florianópolis has become a true experimentation environment,’ the mayor says.

This model is supported by targeted public policies. In recent years, the municipality has begun to provide non-repayable grants of up to 200,000 reais for startups, through public calls evaluated with the support of business associations, universities, and private sector representatives.

In practical terms, current trends signal a structural consolidation of the capital’s economic bedrock. While in the past Florianópolis depended mainly on public services, local commerce, and highly seasonal tourism, today technology occupies a central position. Approximately 25% of municipal revenue already comes from the IT sector. ‘We have 12 startups for every thousand inhabitants, the highest rate in Brazil,’ says Topázio.

According to Diego Ramos, President of the Santa Catarina Technology Association (Acate), this performance stems from long-term economic maturation. ‘The technology ecosystem of Florianópolis did not emerge overnight. It is the result of a continuous process, built up over decades,’ says Ramos.

Even tourism has changed its profile. The city has established itself as a destination for corporate events, boosting the economy outside of peak season. The concession of Hercílio Luz International Airport to the Swiss group Zurich Airport Brasil



elevated the the service standard, expanded international connectivity, and opened direct flights to Europe, altering the profile of visitors.

To support this model, the city government invested approximately 6 million reais in workforce training programs for technology, in partnership with Senai, seeking to mitigate the shortage of qualified professionals—currently the main bottleneck in the sector.

This dynamism extends to Greater Florianópolis. Municipalities such as São José, Palhoça, and Biguaçu are expanding their industrial and logistical importance, while the island concentrates advanced services and innovation. Established companies, such as Intelbras, help distribute skilled jobs throughout the region. ‘Florianópolis doesn’t grow on its own,’ says Topázio.

JOINVILLE—THE INDUSTRIAL REINVENTION

Over the past two years, Joinville has tried to reduce bureaucracy, simplify processes, and review the tax burden on businesses and entrepreneurs. The city government shortened licensing deadlines and reduced the Municipal Service Tax (ISS) from 5% to 2% in sectors such as logistics to make the business environment more competitive.

Downtown Joinville: 26,000 new companies in one year



NORTH

The region is a traditional metalworking hub and, more recently, home to important logistics groups such as the Port of Itapoá.

MAIN CITIES: Jaraguá do Sul, Joinville, Mafra, São Bento do Sul

REGION GDP: 100 billion reais

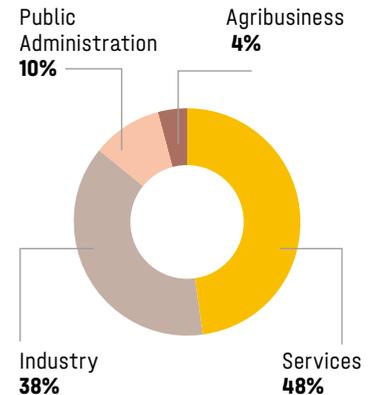
POPULATION: 1.53 million

GDP PER CAPITA: 69,400 reais

MAIN COMPANIES IN THE REGION

WEG (capital goods), **Abimex** (logistics), **Tupy** (capital goods), **Metal Group** (metallurgy), **Rogga** (construction), **Panatlântica** (metallurgy), **Cia Canoinhas** (paper and pulp), **Port of Itapoá** (logistics), **Tuper** (metallurgy), and **Schulz** (capital goods)

PARTICIPATION OF ECONOMIC ACTIVITIES IN GDP

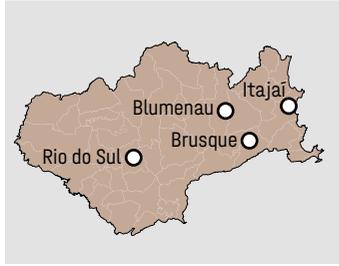


the top one thousand leading innovative cities in the world. ‘Our industry has always been a benchmark in Brazil, but in recent years Joinville has made a leap in the technology sector,’ says Mayor Adriano Silva.

In Northern Santa Catarina, the industrial sector maintains a trajectory of renewal and evolution. One example is the recent announcement by WEG, from Jaraguá do Sul, which foresees 1.1 billion reais in investments for the construction of a new factory and the expansion of the other existing one—one of the largest industrial investments currently underway in the country.

The logistics infrastructure reinforces this trajectory. The investments in the ports of Babitonga Bay enhance regional competitiveness as an industrial and export platform. The Port of Itapoá alone projects an increase in cargo handling of 1.5 million containers per year. Data from Fiesc indicates that each container throughput generates roughly 10,000 reais in regional wealth. Upon completion of the expansion, this is projected to inject up to 15 billion reais into the economy annually.

The combination of these factors helps explain why Joinville remains one of the economic anchors



ITAJAÍ VALLEY

The textile industry was once the main activity in the region, primarily in Blumenau and Brusque. Today, the logistics infrastructure centered around the Port of Itajaí and the technology sector have taken the lead

MAIN CITIES:

Itajaí, Blumenau, Brusque, Rio do Sul

REGION GDP:

135.9 billion reais

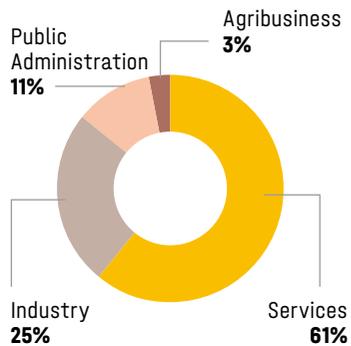
POPULATION: 2.1 million

GDP PER CAPITA: 71,600 reais

MAIN COMPANIES IN THE REGION

Pamplona (food), **Cassava** (food), **Senior** (technology), **Multilog** (logistics), **Metisa** (metallurgy), **Mueller** (home appliances), **Portonave** (logistics), and **Havan** (retail)

PARTICIPATION OF ECONOMIC ACTIVITIES IN GDP



Itajaí Marina: 50% of Brazilian yachts are produced in the city



EDUARDO VALENTE/BECOM

of Santa Catarina.

ITAJAÍ—ASCENDING FROM THE MIDDLE MARKET TO A LEADERSHIP POSITION

The rise of Itajaí is one of the most emblematic cases of economic transformation in Santa Catarina. About three decades ago, the municipality was ranked as the sixth or seventh largest economy in the state. ‘Today, it is always competing with Joinville for first or second place in terms of GDP,’ says Mayor Robinson Coelho.

For a long time, the main economic hub of the Itajaí Valley was Blumenau, driven by one of the most important textile industries in the country. Brands like Hering and Karsten were born there and shaped the regional identity throughout the 20th century. Starting in the 1990s, structural changes in the sector and trade liberalization reduced the relative weight of textiles.

In this process, Blumenau began to grow in other sectors, such as technology. One of the city’s main projects is the creation of a 1.7 million square meter Innovation District to bring together established technology companies, startups, housing, and research institutions. The government of Santa Catarina is investing 60 million reais in the initiative.

Against this backdrop, Itajaí started to gain traction. The primary driver of this turnaround was the port, which established itself as the second largest in Brazil in terms of container traffic. Added to this were the fishing industry and tourism, boosted by its strategic location on the northern coast of Santa Catarina.

More recently, two sectors have begun to reshape the economic profile of the municipality. One of them is shipbuilding: Today, around 50% of yachts and luxury vessels produced in Brazil come from shipyards located in Itajaí. The other driver is the construction industry, which is experiencing a period of strong expansion. Itajaí has begun attracting high-end real estate developments and today has the fourth most expensive square meter in the country, according to the FipeZap index—not far behind its neighbors Balneário Camboriú and Itapema, which lead this ranking after the real estate boom that placed these two cities among the most verticalized in the country.

One of the most emblematic projects of this cycle is Tempo by Müze, a luxury residential building to be constructed on Praia Brava. The project includes seven residential towers and an Emiliano hotel, with an estimated total sales value of 2.5 billion reais. Construction is scheduled to begin this year, with completion expected in 2029, and the architectural design is by Norman Foster, responsible for iconic landmarks such as Apple Park.

The real estate boom is also having a clear impact on the city’s public finances. Over the next four years, Itajaí projects it will collect around 600 million reais in urban grants, funds that will be directed toward infrastructure investments and the

implementation of an Innovation District, scheduled to begin later this year.

To close the cycle, the city government opted for an active fiscal policy. ‘We reduced the ISS for eight sectors from 5% to 3%, and, even so, revenue still grew by about 15% in one year,’ Coelho says.

In three decades, Itajaí has gone from being a supporting player to becoming one of the main economic engines of Santa Catarina. The challenge now is to organize this growth to sustain the new position on the state’s economic landscape.

LAGES—A NEW WAY TO GENERATE WEALTH IN THE COUNTRYSIDE

In her company’s laboratories in Lages, in the Mountains from Santa Catarina, entrepreneur Mayra Juline and her team are working on a product with the potential to save Brazilian farmers millions of reais. At the helm of Plant Colab, she coordinates the development of a rapid test that could change the way producers deal with one of the most problematic pests in corn crops: The leafhopper.

The insect, by itself, is not the main villain. The problem arises when the leafhopper is infected by microorganisms that cause corn stunt complex, a group of diseases that seriously compromises crop development. Infected crops exhibit stunted development and reduced ear formation. In the final phenological stages, they are increasingly susceptible to lodging—a vulnerability that can lead to total crop failure and severe economic losses.

Plant Colab’s approach is straightforward in theory but advanced in practice, enabling farmers to rapidly determine if the leafhoppers in their crops are carrying the infection. The test, currently in its final stages of development, was designed to be practical, accessible, and frequently applied, whether to insects captured in the field or directly to plants. If the infection is detected, the farmer can apply pesticides at the right time. Detecting the presence of the pest without the underlying pathogens allows for the elimination of redundant chemical applications—optimizing operational costs while mitigating waste and environmental impact.

This type of solution accurately represents a new business profile that is beginning to emerge in the Mountains region. Historically, it was shaped by timber industry and traditional agriculture. The region is the largest producer of apples in Brazil—municipalities such as São Joaquim, Urupema and Urubici concentrate 30% of the planted area. These are activities that remain relevant. What has changed is the emergence of companies that, rather than abandoning their traditional strengths, are building upon them—integrating science, technology, and high-value services into the established industrial base.

Regional transformation is not limited to agricultural innovation. In recent years, tourism has

LANDSCAPE OF OPPORTUNITIES

Apple plantation in São Joaquim [SC]: Santa Catarina Mountains region the largest producer of the fruit in the country



THE MOUNTAINS

The region's economic focus is concentrated on agribusiness and the wood/paper and pulp sector

MAIN CITIES:
Lages, Curitibaanos

REGION GDP:
18.8 billion reais

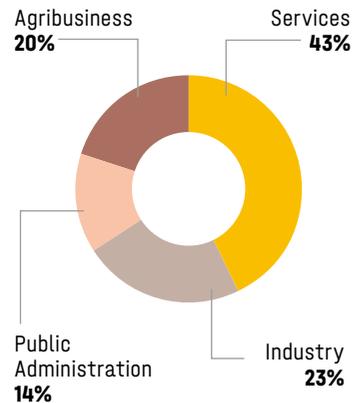
POPULATION: 436,000 people

GDP PER CAPITA: 45,200 reais

MAIN COMPANIES IN THE REGION

Adami (wood), **Primo Tedesco** (paper and pulp), and **Guararapes Panels** (wood)

SHARE OF ECONOMIC ACTIVITIES IN THE GDP



RICARDO TRIDA / SECOM

also gained momentum, supported by the Mountains' natural characteristics. In 2025, the average spending per tourist group in the region grew by 25%, according to a Fecomércio survey. Winter tourism, driven by the landscapes and the harsh weather, began to share space with high-altitude wineries developed over the past two decades.

In the case of Plant Colab, the expectation is that the test for the stunting agent will reach the market in 2027. Meanwhile, the company is operating on other fronts. The main one is the laboratory diagnosis of plant diseases, a service provided to both small farmers in Santa Catarina and large producer groups in the country, such as SLC Agrícola and Bom Futuro. These companies turn to the Lages laboratory to accurately identify the problems affecting their crops and guide large-scale management decisions.

The history of Plant Colab helps explain the new phase of the Mountains region. Where extractive cycles and primary activities previously predominated, businesses are now emerging that combine agriculture, science, and innovation. Ultimately, the Mountains are still doing what it has always known how to do.

CHAPECÓ—THE PROTEIN CAPITAL GIVES MUSCLE

TO NEW BUSINESSES

Western Santa Catarina has established itself as one of the main Brazilian regions for food production. A pioneer in soybean and corn cultivation and in poultry and swine farming, the territory has built, over decades, an agro-industrial complex of national scale. From there emerged meat processing companies such as Sadia, Perdigão, Seara, and Aurora—brands that remain central to Brazilian consumption. This power continues to drive large production chains and, increasingly, opens up space for new businesses.

One of them is Neokohm, founded in 2016 to solve a recurring—and expensive—problem for meat processing plants: failures or fluctuations in the refrigeration systems of trucks during transport. In an industry where a single load can be worth hundreds of thousands of reais, any deviation can condemn an entire truck. The challenge was that the equipment operated offline, without real-time monitoring.

The company developed a hardware and software system capable of remotely monitoring the temperature and operation of equipment, allowing for early diagnoses and preventive actions. Over time, the solution evolved: Today, it is possible to intervene from a distance, even with the truck thousands of kilometers away. Acceptance was swift, especially



WEST

Birthplace of major agribusiness groups, the region maintains a strong vocation for agriculture and agro-industry

MAIN CITIES:
Chapecó, Videira, Concórdia, Joaçaba

REGION GDP:
71.6 billion reais

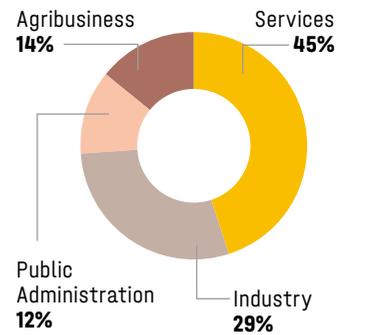
POPULATION: 1.4 million

GDP PER CAPITA: 54.700 reais

MAIN COMPANIES IN THE REGION

Cooperalfa (food/agribusiness), **Coopercarga** (logistics), and **Bragagnolo** (paper and pulp)

PARTICIPATION OF ECONOMIC ACTIVITIES IN GDP



among transport companies, which operate with tight margins. Currently, Neokohm monitors approximately 5,000 refrigerated trucks, which is close to one-fifth of the Brazilian fleet of this type of vehicle.

The strength of agribusiness, however, does not drive solely companies directly linked to the production chain. It creates a demand for technological services that go beyond the field. This is the case with Optidata, from Chapecó. The company started by serving companies in the region itself—many in agribusiness—with cloud data hosting and corporate solutions, such as the Optwork management and collaboration platform. This regional base was the springboard for growth.

Today, Optidata maintains branches in São Paulo and Miami, operates its own data centers, and generates approximately 100 million reais in revenue annually, competing with major global providers in specific niches.

Ultimately, Western Santa Catarina shows that one of Brazil's largest protein production hubs is also capable of providing the strength needed to scale technology and service-based businesses. Where agribusiness grows, problems arise—and those who learn to solve them can go far beyond the boundaries of the countryside.



SOUTH

The region was once dependent on coal mining and industrial sectors such as ceramics. Today, however, it has a diversified economy, and the foundations are ready for a new phase of expansion

MAIN CITIES:

Criciúma, Tubarão, Araranguá

REGION GDP:

45.4 billion reais

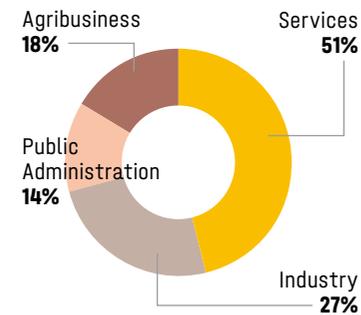
POPULATION: 1.1 million

GDP PER CAPITA: 43,200 reais

MAIN COMPANY IN THE REGION

Granja Faria (food)

SHARE OF ECONOMIC ACTIVITIES IN THE GDP



Lookout point in Criciúma: The former coal capital has become a service hub and a magnet for new industries

CRICIÚMA—A NEW ENERGY

In recent decades, southern Santa Catarina has undergone a profound economic transformation. Its main city, Criciúma, once dubbed Brazil's coal capital. Mining has shaped the urban landscape and the labor market for decades. That cycle is over: There are no more mines operating in the municipality, and the sector has lost relative weight in the regional economy. Take the example of Lauro Müller, also in southern Santa Catarina, which likewise once had coal as its main economic driver. Today, the largest company in the region is Granja Faria, a leading multinational egg producer with operations in Brazil, the United States, and Europe. It had a revenue of over 2 billion reais in 2024 and is the leader in the Brazilian market.

The exhaustion of the previous model forced Criciúma to embrace a vocation as a regional service hub. The reflection appears in the public accounts. 'Today, the revenue from Municipal Service Tax (ISS) is practically equal to that of State Value Added Tax (ICMS),' says Mayor Wagner Espindola.

Part of this transition was made possible by a deliberate effort on the part of the public authorities. In recent years, the city has invested half a billion reais in urban infrastructure. At the same time, it streamlined bureaucratic processes to opening businesses and encouraged innovation.

In one of the initiatives, the local government grants subsidies of up to 40,000 reais to up to ten startups per year, with the condition that the solutions developed can be applied to municipal management.

It is not just Criciúma. The entire southern part of the state has diversified its economy. There was a period when the ceramics industry accounted for a large part of the regional activity. Today, it coexists with the chemical, plastics, and metalworking sectors, forming a more balanced production base.

An example of this new configuration is Farben, a manufacturer of paints and varnishes for furniture and the automotive sector, headquartered in Içara, a neighboring city. The company plans to invest 120 million reais by 2031 to expand production, open branches, and broaden its international operations. Currently, it exports to around 20 countries and aims to reach 40 markets by the beginning of the next decade.

The company is now finalizing the opening of its own branch in Atlanta, in the United States, with operations scheduled to begin in March. 'Our products remain relatively competitive in the United States,' says Edmilson Zanatta, CEO of the company.

At the local level, diversification must continue. According to the mayor, Criciúma is negotiating the setup of four new companies from different sectors and is preparing a roadshow to present a smart city PPP. The project includes LED street lighting, 150 kilometers of fiber optic cable, precision security cameras, and a photovoltaic power plant to supply electricity to public buildings and the municipal fleet. The former coal capital is thus beginning to find a new source of energy. ●



Downtown Florianópolis: Technology reduces robberies and disruptions to daily life in major cities

WITH STRATEGIC PLANNING AND TECHNOLOGY, SANTA CATARINA DEFIES NATIONAL TRENDS TO MAINTAIN ITS STATUS AS THE SAFEST STATE IN THE COUNTRY

RAFAEL MARTINI

WHILE THE VIOLENCE BECOMES ENTRENCHED AS THE BIGGEST CONCERN for Brazilians, Santa Catarina is bucking the national trend and consistently maintaining its status as the safest state in the country. The most recent data confirms that Santa Catarina's performance neither a fluke nor a temporary occurrence, but the result of a structured public policy, continuous investments, and integration between security forces, intelligence, and the prison system.

Surveys such as the State Competitiveness Ranking, from the Center for Public Leadership (Centro de Liderança Pública, CLP), show Santa Catarina as the nationwide leader in public safety for the seventh consecutive year. The Yearbook of the Safest Cities in Brazil reinforces this scenario, with municipalities in Santa Catarina dominating the top of the ranking. Meanwhile, the Atlas of Violence, based on data from the Ministry of Health and IBGE, classifies the state as one of the main success stories in reducing lethal violence in the country.

In 2024, its homicide rate was 8.6 deaths per 100,000 inhabitants—less than a third of the national average, which has reached 25.7. In 2025, the indicator advanced even further: In the first semester, the rate fell to 2.8 homicides per 100,000 inhabitants, marking a significant milestone: About 70% of the municipalities in Santa Catarina did not register a single fatality during the period. Between June and September 2025, the state recorded the lowest homicide rates for those months in the past 18 years.

According to the Secretary of State for Public Security, Colonel Flávio Graff, the numbers reflect a structural change. 'Results do not happen by chance. They are the result of planning, integration between forces, historical investments in technology, intelligence, and professional development. Santa Catarina has built a model that combines prevention, qualified repression, and rigorous control of the prison system,' states Graff.

SOCIAL ENVIRONMENT HELPS EXPLAINING THE NUMBERS

Public safety indicators in Santa Catarina go hand in hand with a structurally favorable socioeconomic environment, which acts as a factor in containing crime. The state has the lowest unemployment rate in Brazil, around 2.3%, lower than observed in developed countries such as Germany, the United States, and Canada. In a national context marked by significant levels of informality and structural unemployment, this data has a direct impact on social and urban dynamics.

Santa Catarina also registers the lowest proportion of beneficiaries of federal social welfare programs, signaling greater economic autonomy for its families. Added to this is the second lowest illite-

A TANGIBLE SENSE OF SECURITY

racy rate in the country, a relevant indicator when observing the correlation between education, productive inclusion, and crime reduction. The state still leads in income distribution, with the lowest Gini Index in Brazil, in addition to having the lowest poverty and extreme poverty rates among the federative units.

These factors help explain why violence finds less room to take shape. Reduced social vulnerability, combined with high formal employment rates and better income distribution, eases the burden on the public security system and acts as a barrier against the recruitment of young people by organized crime. In Santa Catarina, crime finds less fertile ground to establish itself as an economic alternative.

INVESTMENT, TECHNOLOGY AND ENHANCEMENT OF SECURITY FORCES

Santa Catarina has transformed investment in public safety into a long-term structural policy. The state currently allocates about 12% of its entire budget to this area—one of the highest percentages in the country and well above the national average. In 2024 alone, direct investments in operating costs, infrastructure, equipment, and technology exceeded 700 million reais, not including personnel expenses. The resources were directed toward modernization of police units, acquisition of vehicles, weapons, personal protective equipment, and expansion of intelligence systems.

Professional development and recognition are other central pillars of this model. In 2025, the state government granted a 21.5% salary increase—the largest real gain in the history of Santa Catarina’s public security careers—benefiting over 35,000 active and retired professionals. The budgetary impact of the salary adjustment will be approximately 1.4 billion reais per year when fully implemented. The measure had a direct effect on troop morale, reducing professional turnover and strengthening the institutional capacity of the security forces.

The Santa Catarina state police force totals more than 16,000 officers, distributed among the Military Police, Civil Police, Forensic Police, Military Fire Department, and Penitentiary Police. With a ratio of 215 officers per 100,000 residents, Santa Catarina outperforms the national average. The figure is consistent with international policing benchmarks in countries renowned for their low crime levels. The territorial distribution of personnel was adjusted based on data analysis, prioritizing strategic regions, logistical corridors, and areas with higher population flow.

Technology has taken on a vital role in the state’s security strategy. The facial recognition project, with an initial investment of 40 million reais, involves the installation of 1,000 smart cameras across sixty municipalities. The technology is integrated with state and interstate



databases, enabling the real-time identification of individuals with outstanding arrest warrants. The system has already been assessed at major events and special operations, resulting in the arrest of fugitives and the prevention of incidents, including at popular festivals such as Oktoberfest Blumenau.

Beyond facial recognition, Santa Catarina has consolidated one of the largest state-level video surveillance networks in the country, with more than 5,300 cameras in operation and 3,400 automatic license plate readers—critical tools for combating property crimes, vehicle theft, and the movement of criminal organizations between states.

PRISON SYSTEM: REHABILITATION INITIATIVES AND CONFRONTING CRIMINAL FACTIONS

Santa Catarina currently operates fifty-four prisons across thirty-three municipalities, housing approximately 30,300 incarcerated individuals and another 4,100 monitored via electronic ankle bracelets.

Unlike the scenarios observed in other states, the system operates without any loss of internal territorial control, featuring centralized management, strict protocols, and permanent integration with other security forces.

To support this model, the state government has implemented an investment program of 1.4 billion reais until 2028, aimed at expanding and modernizing the prison infrastructure. The plan foresees the creation of 9,600 new prison spaces, which will eliminate the historical deficit, reduce overcrowding, and allow for the separation of inmates by criminal profile, risk level, and gangs affiliation—a strategic move considered strategic in weakening criminal organizations.

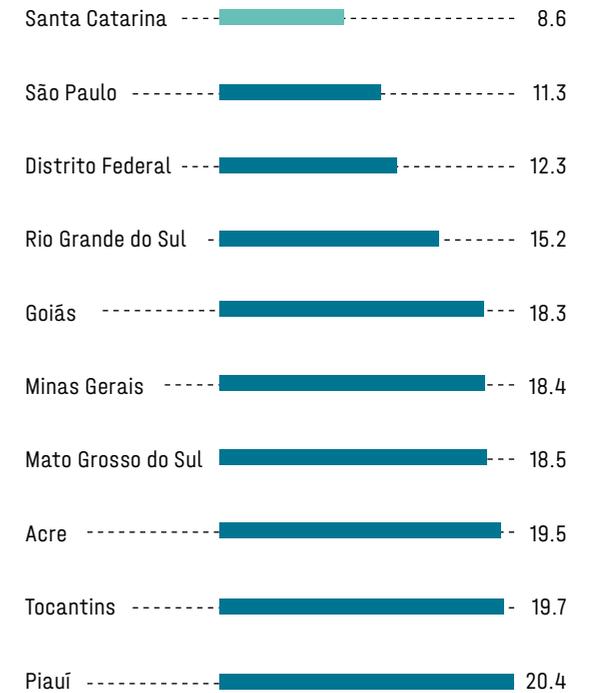
The distinguishing feature of Santa Catarina lies in the management of the system. The state maintains absolute control over the units, with strict isolation of faction leaders, permanent control of illicit communications, systematic searches, and constant monitoring of internal flows.

THE RATE OF VIOLENT DEATHS IS WELL BELOW THE NATIONAL AVERAGE

Analysis of the indicators explains why Santa Catarina is considered the safest state in Brazil

The safest states

(murders per 100,000 inhabitants/2024)



Source: mysida.com.br.

Another important pillar is the focus on resocialization and prison labor. Currently, more than 33% of the prison population in Santa Catarina engages in paid work, a percentage significantly higher than the national average. The prisoners work in internal workshops, maintenance services, industrial production, and partnerships with private companies, reducing prison idleness and contributing to internal discipline. Furthermore, 54% of inmates participate in educational activities, including literacy programs, elementary school, high school, and vocational courses.

In 2024, the prison system collected 28 million reais through the legal withholding of part of the salaries paid to working inmates, resources that were fully reinvested in the units themselves for infrastructure improvements, equipment purchases, and strengthening rehabilitation programs. By 2025, revenue is expected to reach 33 million reais. The model creates a virtuous circle: It reduces costs to the state, improves internal management, and increases the chances of social reintegration after serving a sentence.

Prison System: 1.4 billion reais will be invested until 2028 with expansion and modernization

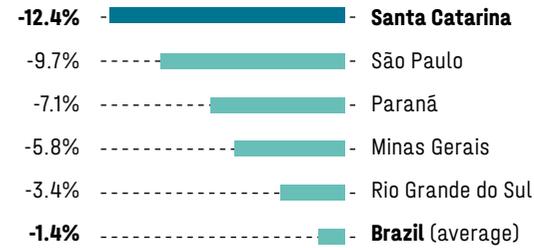


MARCO FAVERO

SC WAS THE STATE THAT REDUCED THE NUMBER OF HOMICIDES THE MOST

Decrease in key indicators in Santa Catarina has a much higher average than the national average

Decrease in intentional homicides (2023/2024)



Thefts in free-fall (2023/2024)



Source: Brazilian Yearbook of Public Security.

COMBATING ORGANIZED CRIME AND BORDER CONTROL

The fight against criminal organizations in Santa Catarina combines targeted repression, financial intelligence, territorial control, and interstate and federal integration. In 2025, the state recorded the highest volume of drug seizures in its history, exceeding 60 tons—of which 56.5 tons were marijuana—alongside significant volumes of cocaine, crack, and hashish. The data reflects a strategy focused not only on arresting perpetrators, but mainly on dismantling the logistical and financial networks of drug trafficking.

During the same period, between 2023 and 2025, security forces removed 7,039 firearms from circulation, many of them restricted weapons used by criminal factions in territorial disputes and high-impact offensive actions. The removal of this arsenal significantly reduced the potential lethality of criminal organizations and directly contributed to the decrease in lethal violent crimes in the state.

The operations are strategically focused on border regions and key logistics corridors, routes historically used for drug trafficking, weapons, smuggling, and contraband.

The main focus of this operation is the Integrated Border Command and Control Center, located in Dionísio Cerqueira, which operates permanently with real-time monitoring, data analysis, and joint action between the Military Police, Civil Police, Penitentiary Police, State Highway Police, as well as integration with the Federal Police, Federal Revenue Service, and security forces from neighboring states.

Police intelligence in Santa Catarina is another central pillar of the strategy. By 2025, 99% of investigations involving criminal organizations will have been concluded, resulting in the identification of those involved and their criminal prosecution. In money laundering cases, the clearance rate has reached 95%, involving bank account freezes, asset seizures, and the financial decapitalization of criminal groups. The focus on financial strangulation has proven decisive in weakening factions, reducing their recruitment capacity, and limiting criminal recidivism.

OKTOBERFEST BLUMENAU: BRAZIL'S SAFEST FESTIVAL

Oktoberfest Blumenau has established itself as one of the leading national case studies in security at large mass events. In 2025, it reached an unpre-

cedented level in the country. Over the course of 19 days, approximately 700,000 people circulated through Vila Germânica Park. The operation successfully balanced daily peaks of over 80,000, high alcohol consumption, and an intense cultural schedule. Against all odds, the event concluded with just a single reported cell phone theft and no major incidents, marking it as the safest Oktoberfest ever recorded.

The result was not accidental. The 2025 edition marked the consolidation of a security model based on intelligent monitoring, facial recognition, behavioral analysis, and integrated real-time response. The park featured hundreds of high-resolution cameras, connected to control centers operated jointly by the event organizers and public security forces. Some of the equipment used facial recognition technology integrated with databases of people with outstanding arrest warrants, allowing for identification and preventive intervention right at the event entrance.

In addition to video surveillance, the plan involved strict access control, public sectorization, real-time flow monitoring, and an ostentatious, yet discreet, presence of private security teams, Military Police, Civil Police, and Fire Department. By leveraging historical data and intelligence, authorities could anticipate risk hotspots, optimize

staffing levels, and act preemptively to prevent police incidents from unfolding

For Guilherme Benno Guenther, president of Oktoberfest Blumenau, security is no longer merely an operational requirement and has become an integral part of the event's strategic positioning. 'Oktoberfest is now the safest festival in Brazil. This is the result of technical planning, investment in technology, and full integration with security forces. Security is no longer just about reaction; it is about prevention,' states Guenther.

He believes that public perception is a central part of success. 'People feel safe to move around, shop, bring their families, and stay longer at the event. This translates directly into the attendee experience, the event's brand reputation, and its overall economic performance.'

The experience in Santa Catarina shows that effective public safety goes beyond visible policing. It depends on continuous investment, intelligence, prison system management, and institutional integration. By combining these factors, Santa Catarina has transformed security into an economic and social asset. In a country marked by instability and violence, the state offers predictability, territorial control, and quality of life—a security that is visible, measurable, and sustainable in the long term. ●



Policing: SC has 215 agents per 100,000 inhabitants, greater than the Brazilian average

ROBERTO ZACARIAS

Weg's factory in Jaraguá do Sul: Balance between local potential and global vocation

INDUSTRY AS A PRIORITY

SANTA CATARINA STANDS AS AN INDUSTRIAL POWERHOUSE, REINVENTING ITSELF AND CAPTURING GLOBAL MARKETS DESPITE GEOPOLITICAL CHANGES

LUCIANO MANENTI

SANTA CATARINA OCCUPIES A UNIQUE SPACE HOME on the Brazilian industrial landscape. Relatively small in territory and population, but dense in productive capital, the state built an industrial economy capable of navigating economic cycles, absorbing external shocks and maintaining a relevant presence in international trade—even in a world marked by geopolitical tensions, tariff disputes and the reorganization of global value chains.

The current industrial design of Santa Catarina is the result of a long and incremental process. Unlike other Brazilian industrial hubs, often shaped by large state-led projects, Santa Catarina's productive base stems from small and medium-sized family enterprises (SMEs), many of them founded by European immigrants at the end of the 19th and beginning of the 20th century.

Textile companies in the Itajaí Valley, metalworking companies in the North, ceramics, and coal

mining in the South, timber and furniture industries in the Planalto region and the agribusiness in the West grew in a decentralized manner, anchored by their own capital, continuous reinvestment, and strong ties with their local communities.

This environment fostered the birth of prominent brands in their sectors, many of which remain market leaders and household names to this day. In some cases, control has changed hands—such as the clothing manufacturer Hering, the metalworking company Tupy, and the shirtmaker Dudalina. Others maintain the presence of the founders' families, such as the Portobello ceramics company, the telecommunications equipment industry Intelbras, and the electrical equipment and capital goods manufacturer Weg. One way or nother, there are few exceptions of companies that have ceased operations in the state.

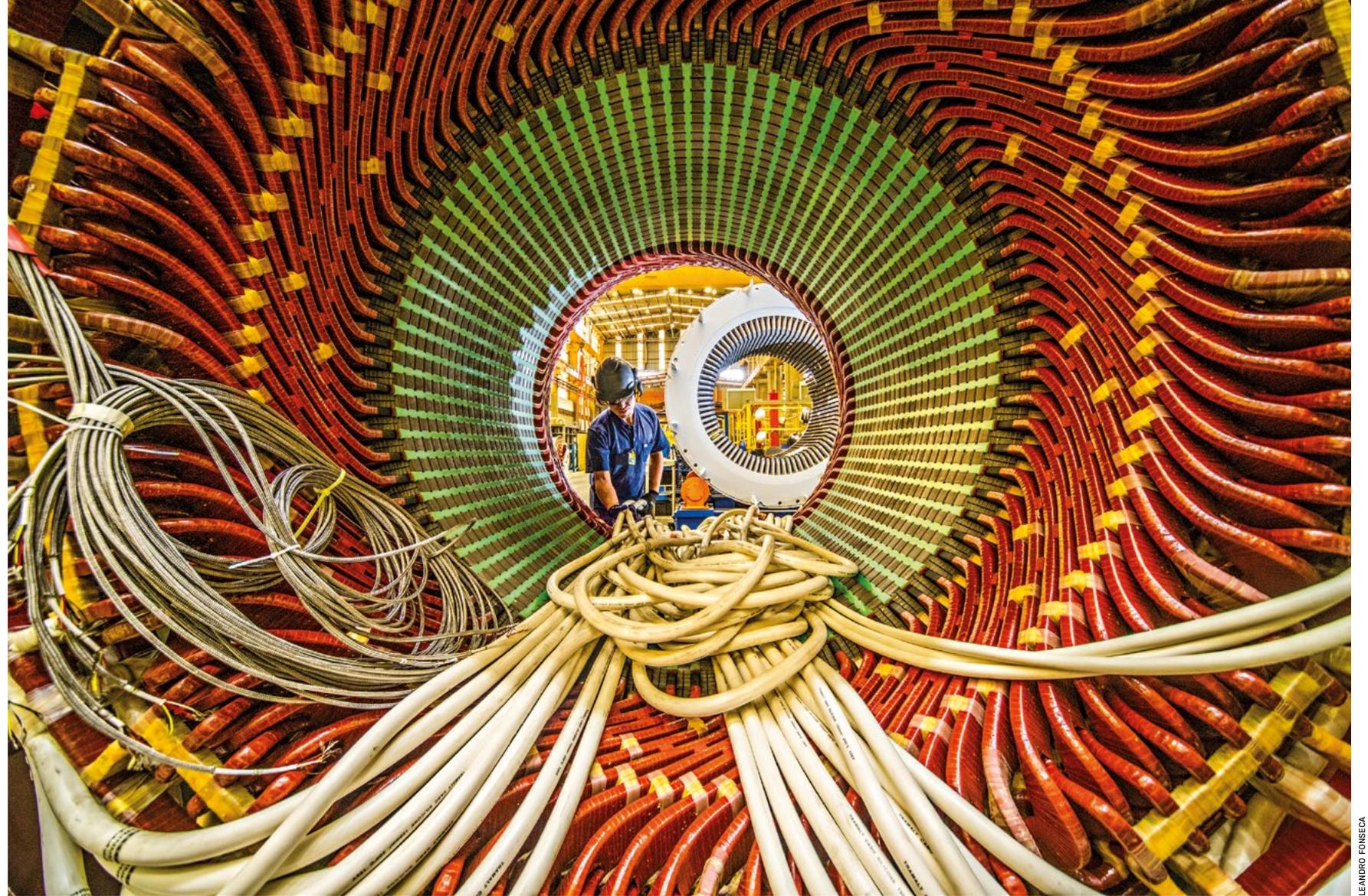
In recent decades, the industrial model has undergone profound transformations. The trade liberalization of the 1990s forced productivity gains.

Later, the 2000s consolidated the state's former status as an exporter. More recently, the industry in Santa Catarina has advanced in terms of automation, digitalization, and higher value-added products.

The result is an industrialized state that is not dependent on a single sector. This diversification has proven to be a strategic advantage in an increasingly volatile global landscape.

DIVERSIFICATION AS A COMPETITIVE ADVANTAGE

Today, Santa Catarina is home to one of the most diversified production structures in Brazil. Such heterogeneity enables the state to maintain a more balanced response to economic fluctuations; while one sector may suffer from external impacts, others continue to expand, cushioning the overall economy. 'Productive diversity creates a critical local mass of suppliers, customers, and service providers that helps reduce costs, accelerate investment decisions, and stimulate new ventures,' says Pablo



LEANDRO FONSECA



Alexandre Wiggers, President of Condor: Santa Catarina will be a priority in the new investment cycle

Bittencourt, Chief Economist of the Federation of Industries of the State of Santa Catarina (Fiesc).

This business environment is reinforced by well-defined regional characteristics and a logistics network that is above the national average. Ports such as Itapoá, São Francisco do Sul, Itajaí, Navegantes, and Imbituba directly connect Santa Catarina's production to major global markets. The state's highway network is now undergoing a modernization process that will contribute to reducing historical bottlenecks. The state also benefits from a skilled workforce, supplied by technical schools and vocational training centers that directly address industry needs.

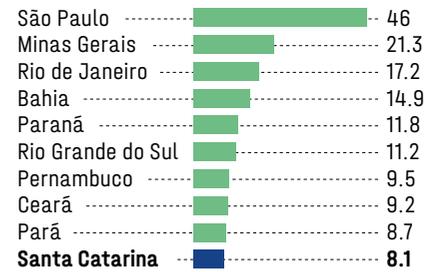
The combined effect of these factors shows in the numbers. In recent years, the industrial production in Santa Catarina has been growing above the national average.

Exports maintained a positive trajectory. The tariffs imposed by the United States on Brazilian

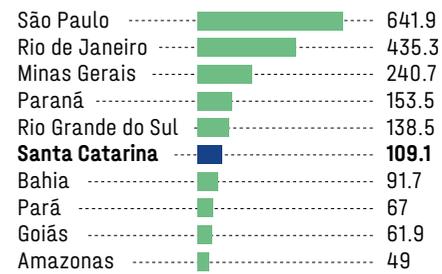
A WELL-OILED MACHINE

Santa Catarina is only the tenth most populous Brazilian state, but it has the sixth largest industrial GDP in the country.

Population (in millions)



Industrial GDP (in billions of Brazilian reais)



Roughly one in four companies in Santa Catarina are industries—and they employ one in three workers. It is the largest proportion in the country.

Participation of industries in the total number of establishments in the state



Participation of industries in the number of workers in the state



Nearly 10% of Brazilian industries are located in Santa Catarina—the third largest share among Brazilian states.

Participation in the number of industries in Brazil



Sources: IBGE, CNI.

products were a severe blow to the Santa Catarina industry in 2025, which has the American market as its main trading partner—unlike other Brazilian states, whose economy is strongly supported by commodities, and which have China as the main destination for their exports. 'The industry in Santa Catarina suffered from the tariffs, but it remains strong,' says Bittencourt, from Fiesc. He explains that diversified regional economies like the one from Santa Catarina tend to recover quickly from crises. 'If there was a silver lining to the price hike, it was that it made many companies seek out new markets, and the results are gradually starting to appear,' says Bittencourt.

GLOBAL AND LOCAL COMPANIES

Few companies better exemplify the strong position that industries hold in the Santa Catarina economy than Weg. A Brazilian multinational operating in more than fifteen countries, the company has spent the last 25 years refining a global strategy centered on localized production.

Works by Casan, the state's water and sewage concessionaire: Investments to reduce infrastructure bottlenecks in areas such as sanitation and highways

By placing manufacturing plants near key markets in North America, Europe, and Asia, it maintains global agility while remaining firmly anchored in its Santa Catarina headquarters.

Over the past five years, the company has invested approximately 5 billion reais in capacity expansion and global acquisitions, becoming a world leader in industrial electric motors. Nevertheless, Santa Catarina remains at the center of its strategy. Last year, Weg announced the largest investment in its history in a single production unit, precisely in the state where it was founded. 1.1 billion reais will be invested in constructing a new industrial park in northern Santa Catarina and in increasing the capacity of plants in Jaraguá do Sul. These projects aim to expand Weg Energia's portfolio and installed capacity.

The company's logic is pragmatic: Factories abroad reduce exposure to tariff barriers and trade conflicts, while the Santa Catarina base concentrates engineering, research, and production of high value-added products. Today, more than two-thirds of the company's manufacturing plants are located outside of Brazil, but Jaraguá do Sul remains a technological and strategic hub. In an uncertain global environment, the combination of international presence and local roots has become a competitive advantage.



Condor, a traditional manufacturer of hygiene and cleaning products with a century of history and headquartered in São Bento do Sul, in the northern plateau of Santa Catarina, is also preparing for a new investment cycle, focused on expanding distribution centers and industrial units. ‘These projects are still in the approval phase by our shareholders,’ says Alexandre Wiggers, President of the company. ‘Santa Catarina is the absolute priority for these investments’.

Wiggers highlights the main factors that lead him to prioritize Santa Catarina: Regulatory predictability, incentives aligned with the circular economy, and workforce quality. Recycled content accounts for 57% of Condor’s industrial inputs. This strategy is supported by state-level tax benefits that effectively reduce the tax burden and promote environmental stewardship. The proximity between production units, especially in the São Bento do Sul region, also generates significant logistical and operational gains.

Even while evaluating alternatives outside the state, the company maintains Santa Catarina as the central focus of its expansion strategy. ‘It’s where we manage to combine productive efficiency, human capital, and institutional support,’ says Wiggers.

PRAGMATIC INDUSTRIAL POLICY

From an institutional point of view, Santa Catarina stands out for its more stable and pragmatic industrial policy. State programs such as Prodec and Pró-Emprego, combined with tax regimes focused on raw material imports and industrial expansion, help reduce uncertainties in long-term projects—even in a national context where tax incentives are increasingly restricted by Confaz agreements and the tax reform.

According to Fiesc’s Bittencourt, the key difference lies not only in the incentives, but also in the predictability and the ability to engage in dialogue between the government and the productive sector. This interaction between government and the productive sector has been particularly relevant during times of external shock, such as the recent tightening of tariffs by the United States. Avoiding one-size-fits-all measures, the state opted for targeted, time-bound interventions. This approach successfully minimized economic fallout without distorting the economic environment.

The result is a rare paradox in Brazil: Santa Catarina combines low unemployment, above-average industrial growth, and strong international integration, despite not having large metropolitan areas or the scale of more populous states.

One indicator helps demonstrate how the strength of Santa Catarina’s industry manifests in practice. In the Atlas of Competitiveness in Santa Catarina, Fiesc adapted the Industrial



Intelbras office in São José: Companies from Santa Catarina grow without losing their roots

Competitiveness Index (ICI), developed by the United Nations Industrial Development Organization (UNIDO), to compare Brazilian states. The index frames competitiveness through the lens of market expansion and technological progress, ensuring that economic growth is harmonized with high standards of living and sustainable environmental practices. It combines two central dimensions: The capacity to produce and export manufactured goods and the degree of technological depth and sophistication of the industry.

The results place Santa Catarina at the top of the national ranking. According to Fiesc, in 2021, the state led the ICI, surpassing the likes of São

Paulo, Rio Grande do Sul, and Paraná. Santa Catarina has the highest added value in manufacturing per capita from Brazil, estimated at 1,736 dollars per inhabitant (base 2015), in addition to industrial exports per capita above the national average. In 2021, the industry accounted for 27.5% of the state’s Gross Value Added (GVA), with manufacturing accounting for nearly 78% of that total—the second largest industrial share in the country, behind only Amazonas, whose structure is heavily influenced by the Manaus Free Trade Zone.

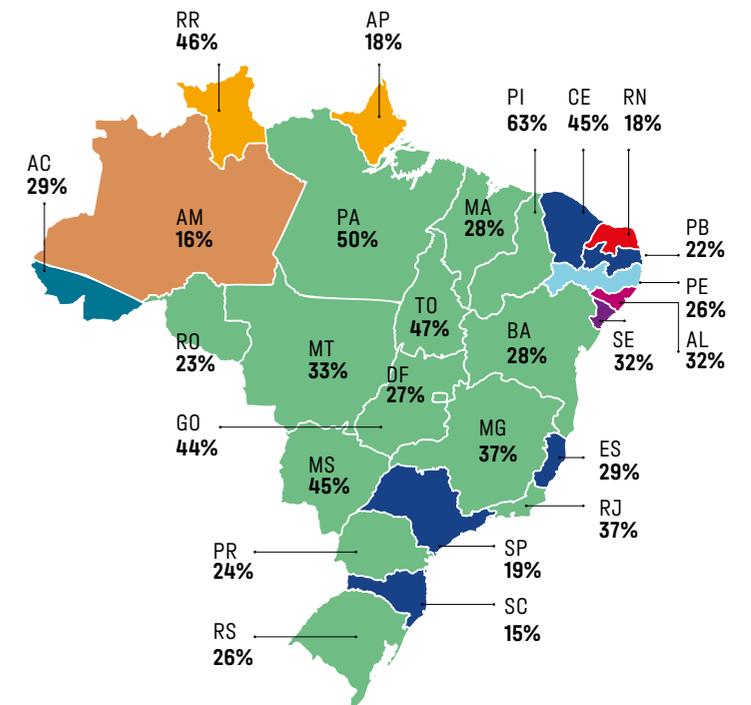
According to the same study, the industrial profile of Santa Catarina is similar to that of other emerging and highly competitive economies, such

BEYOND THE AMERICAN DREAM

Santa Catarina’s companies are opening new markets to compensate for risks of selling to the U.S., which until 2024 were the main destination for Santa Catarina’s exports.

Main Exports Destinations

- Peru
- Germany
- Argentina
- Canada
- China
- Singapore
- Venezuela
- USA
- Netherlands



Source: Secex.

as Turkey, India, and Indonesia—all markets with significant manufacturing and strong external integration, despite persistent challenges in infrastructure and technological advancement. The diagnosis suggests that Santa Catarina already operates at a competitive level comparable to that of developing countries, with an industrial economy integrated into the global market.

Up to this point, Santa Catarina has been able to sustain a competitive and agile industrial sector capable of adapting to the major market transformations of recent decades—and these skills will be even more necessary in the coming years, in an increasingly complex world. ●



Perini Business Park, Joinville: Tech companies bring new life to a traditional industrial region of Santa Catarina

RICARDO WOLFFENBÜTTEL

THE ISLANDS OF INNOVATION

AN ECOSYSTEM COMPRISED OF UNIVERSITIES, ENTREPRENEURS, INCUBATORS, AND THE PUBLIC SECTOR DRIVES TECHNOLOGY COMPANIES ACROSS ALL REGIONS OF SANTA CATARINA

LUCIANO MANENTI

FOR A LONG TIME, INNOVATION IN SANTA CATARINA WAS treated as a localized phenomenon with a view of the sea, so to speak. Alongside its lush beaches, the capital city of Florianópolis has built a well-deserved reputation as a Silicon Island because of the strong share that technology companies have gained in the local economy in recent decades.

Today, this represents just a single chapter in a far broader narrative. The innovation economy does not rely on an isolated hub—it is distributed throughout all regions of the state.

At the core of this model lies the innovation ecosystem that Santa Catarina has meticulously developed over the years. It integrates academia, mature corporations, market-driven startups, investor networks, and support structures like business incubators.

By merging a robust entrepreneurial spirit with consistent public policy, the state fosters an environment where startups are born closer to actual market needs, significantly increasing their success rates.

Data helps us understand how successful this model has been. In 2024, the technology sector in Santa Catarina generated 42.5 billion reais in revenue, equivalent to 7.75% of the state's GDP, the second largest share among Brazilian capitals. There are over 29,000 technology companies and approximately 100,000 direct jobs.

Data provided by the Santa Catarina Technology Association (Acate) highlights this evolution. Established in 1986 to foster a fledgling innovation scene, Acate now represents 1,850 companies and spearheads key initiatives like the MidiTec incubator and the LinkLab open innovation hub.

Beyond the sheer scale of the sector, the true strength lies in its makeup: a dense network of specialized mid-sized firms driven by efficiency, global service exports, and deep integration into large-scale industrial supply chains.

In Florianópolis, the ISS tax revenue from the technology sector more than tripled in five years, jumping from approximately forty-four million Brazilian reais in 2019 to 146 million Brazilian reais in 2024. In other words, technology has gone from being a promise to becoming a concrete basis for municipal revenue. In the Itajaí Valley, the movement was even more remarkable. Blumenau's tech-related tax revenue experienced a staggering 1,000% increase, hitting the fifty-nine million reais mark in 2024. In the western region, Chapecó saw its ISS revenue linked to technology grow by approximately 275% between 2019 and 2024, driven by startups and companies connected to agribusiness.

Florianópolis remains a showcase: it concentrates about a third of the companies in the industry and has the second largest share of technology in the municipal GDP among Brazilian capitals. Some of these companies were founded within Sapiens Parque, a technology park spanning 4.3 million square meters in the north of Santa Catarina Island.

Managed by the state government, Sapiens was designed to integrate scientific research, private enterprise, and

urban planning. It houses two incubators, a software and hardware company accelerator, state-of-the-art laboratories belonging to large groups such as JBS, and other companies that either originated there or moved there seeking the best conditions for growth. ‘Sapiens’ main role is to orchestrate all members of the innovation ecosystem,’ says Eduardo Vieira, CEO of the technology park.

It was in this environment that companies like Indicium gained scale. Founded in 2017, the company started as a consultancy dedicated to helping organizations unlock the value of their existing data through better analysis and utilization. It had a revenue of thirty-two million Brazilian reais in 2023. In November 2025, Indicium joined forces with the British company Mesh AI, which specializes in data and Artificial Intelligence for large corporations. This strategic union created a global powerhouse operating across five countries under the new brand name, Indicium AI.

‘Santa Catarina’s innovation ecosystem was absolutely crucial for the birth and growth of Indicium,’ says Isabela Blasi, co-founder of the company. ‘Florianópolis, in particular, offers something very rare: Genuine proximity among entrepreneurs, universities, associations, investors, and large companies.’

Despite the merger with Mesh AI, the state continues to serve as a strategic base, due to the talent pool and the maturity of its innovative ecosystem. ‘The state remains a key hub for talent, leadership, and innovation. Our vision has always been global, but our roots are firmly planted here,’ says Blasi.

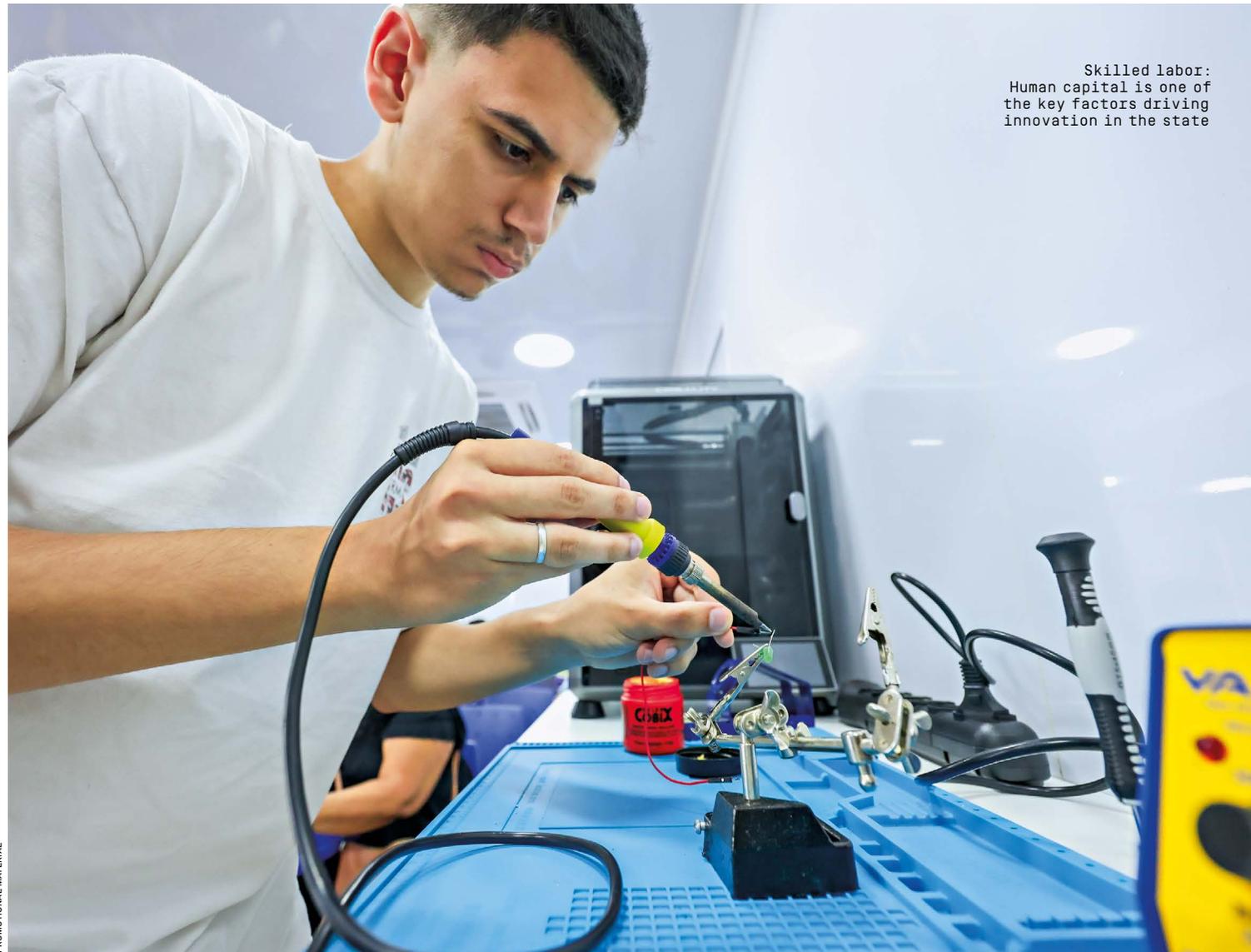
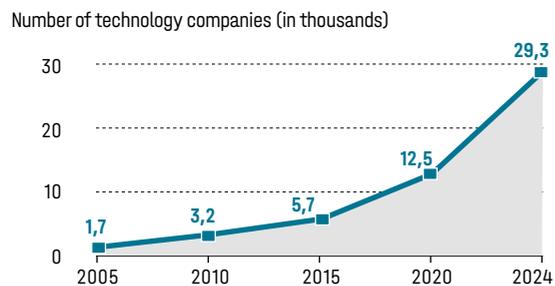
The strength of the Santa Catarina model is quite clear outside the capital. Take the case of Joinville, the largest city in the state. Home to more than 600,000 people, it serves as a prime example of transformation: historically a metal-mechanical powerhouse, it has integrated frontier innovation without breaking away from its manufacturing vocation.

There are advanced engineering startups, such as Outer Space, the first rocket laboratory in Southern Brazil,

ISLANDS OF INNOVATION

The technology sector is growing across different regions—while maintaining its connection to the global market

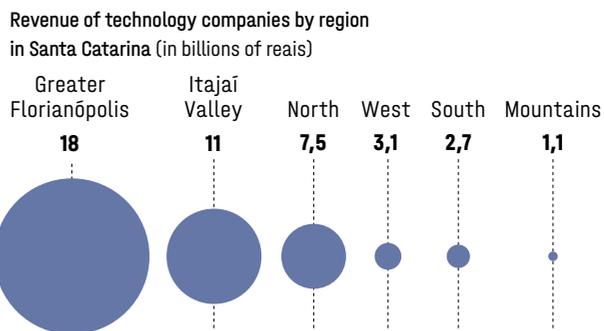
Since 2005, the number of technology companies in Santa Catarina has practically doubled every 5 years



Skilled labor: Human capital is one of the key factors driving innovation in the state

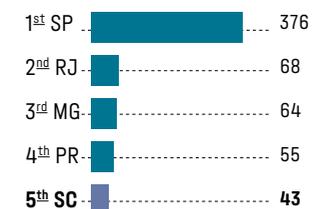
PROMOTIONAL MATERIAL

The revenue of these companies is relatively well distributed across the regions of the state, although there is a slightly higher concentration in Greater Florianópolis.

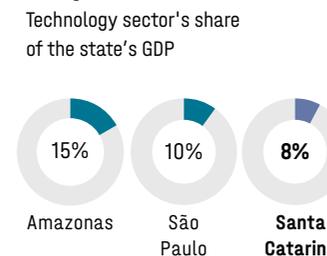


Source: Santa Catarina Technology Association (Acate).

The technology sector from Santa Catarina ranks as the fifth largest in revenue among Brazilian states (in billions of reais)



The share of the technology companies in the state's GDP is nearly 8%, the third highest among Brazilian states



The number of technology companies in Santa Catarina grew by 106.3% from 2020 to 2024—the largest expansion among Brazilian states

located in Ágora Tech Park, a structure dedicated to innovation within Perini Business Park, the largest industrial district in Latin America. There are also well-established companies such as the fintech Conta Azul, which the Norwegian firm Visma acquired in August 2025 in a 300-million-dollar deal. Ventures such as these inject new life into Santa Catarina’s primary industrial centers, driving modernization across the board.

Other regions follow a similar logic. In the Itajaí Valley, corporate software and digital solutions have begun to complement traditional industry. The West has transformed its agribusiness into a platform for AgTech, connecting innovation to consolidated production chains. In the South and the Mountains region, incubators and technology parks are being used as instruments for economic re-conversion, rather than as institutional showcases.

One of the pillars of this system is the nurturing of companies from their earliest stages. The MidiTec incubator, maintained by Acate, has become an international benchmark: It was named the best incubator in Brazil four times and has repeatedly ranked among the best in the world. Its methodology, focused on business discipline and market traction, has helped reduce the startup mortality rates and has been replicated across various regions of the state.

Nanovetores illustrates the type of business that emerges from this environment. The company had a revenue of 21.6 million Brazilian reais in 2024. It develops nano-encapsulated active ingredients for cosmetics, pharmaceuticals, and food industries, leveraging sustainable technologies.

The company—which converts science into high value-added industrial products—was founded in 2008 at the Celta incubator, the oldest in Santa Catarina. Resources obtained through calls for proposals to support innovation from Sebrae and Fapesc, the state’s research and innovation funding agency, were fundamental for the first few years. In 2022, 48% of the company was acquired by the Swiss group Givaudan.

‘There’s a saying that when the tide rises, all boats rise, and that’s very much what we see here in Santa Catarina,’ says Betina Zanetti Ramos, founder and president of Nanovetores. ‘We have here a spirit of collaboration and growth that makes all the difference in our ecosystem’.

To give an idea of how this works in practice, Acate maintains a credit guarantee fund to back financial operations for early-stage member companies, which often lack access to traditional financing. Founders of consolidated technology businesses capitalize the fund. ‘It’s a good example of the collaborative culture we have here.’ says Diego Ramos, president of Acate.

If it depends on initiatives like this, there will be no shortage of innovation in Santa Catarina. ●

THE STRENGTH OF COOPERATIVISM

APPROXIMATELY 58% OF THE POPULATION OF SANTA CATARINA IS ASSOCIATED WITH SOME TYPE OF COOPERATIVE. THE MODEL SHOWS THAT COOPERATION AND DEVELOPMENT GO HAND IN HAND.

RAFAEL MARTINI

SANTA CATARINA HOLDS A QUIET YET TELLING DISTINCTION: It is Brazil's leading state for cooperatives. Approximately 58% of the population is associated with some cooperative, more than three times the national average, estimated at around 17%. Not only due to the absolute number of members—the largest in the country—but especially because of the proportion of people linked to the model. Cooperativism has become part of the state's daily economic life, influencing financial decisions, food production, access to healthcare, transportation, and consumption.

It is actually difficult to find a Santa Catarina resident who is not either a member of a cooperative or impacted daily by one. The system is present in different sectors of the economy, with reach spanning municipalities and entire production chains. Among the various branches, two stand out for their economic weight and social reach: Credit cooperatives and agro-industrial cooperatives.

To understand why Santa Catarina has reached this level, it is necessary to look beyond recent statistics. 'The cooperative movement in Santa Catarina was born from the fusion of individual autonomy and collective organization. Everyone does their part, but no one prospers alone,' summarizes Marcelo Vieira Martins, executive director of Uniced União and author of books on the subject.

The historical formation of the state helps to explain this logic. Santa Catarina was shaped by communities that had to learn early on how to save, plan, and share risks. Cultural diversity—marked by German, Italian, Azorean, and other European immigration—brought with it values such as labor ethics, financial discipline, and a spirit of association. In a territory that demanded continuous effort from newcomers, cooperation ceased to be an option to become a survival strategy.

This cultural trait has transformed into a concrete economic mechanism. Cooperatives scale up,

reduce costs, distribute results, and strengthen territorial ties. In contrast to centralized corporate models, they tend to reinvest locally, ensuring that wealth continues to circulate within their own communities. The effect is clearly visible in the credit sector, which has gained traction amid the accelerated digitalization of the financial system.

COOPERATIVE CREDIT: WHEN THE MONEY STAYS IN THE REGION

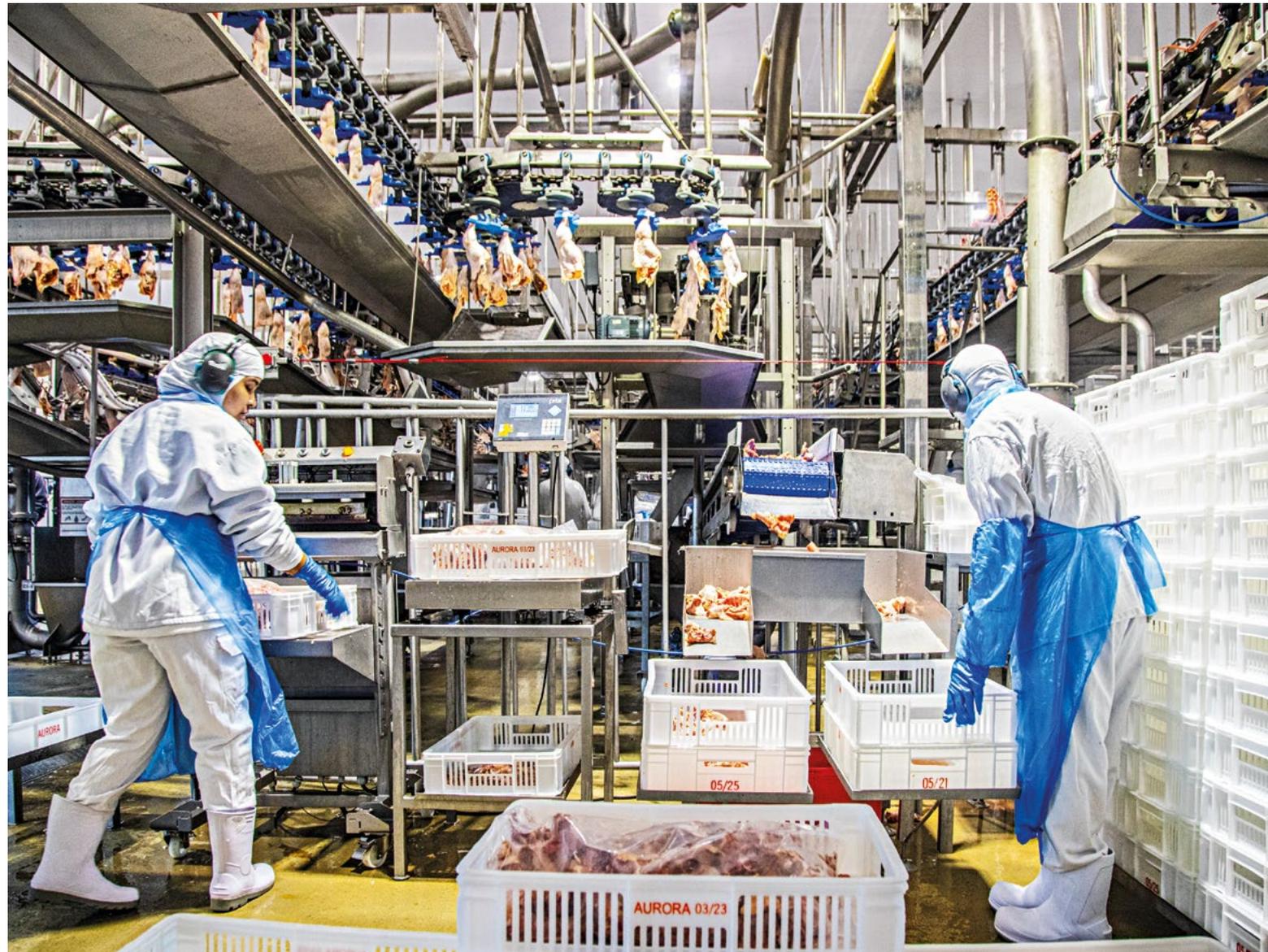
The Ailos System—which brings together thirteen credit cooperatives operating in the three southern Brazilian states and São Paulo—has recently disclosed figures that illustrate the strength of the cooperative framework. The portfolio is expected to jump from 18.8 billion to 45.7 billion Brazilian reais by 2030, supported by an average growth of 19.2% per year, a rate higher than that of the traditional financial system.

According to the most recent figures, from November 2025, the system has over 1.7 million members, 26 billion reais in assets, 18 billion reais in loan portfolio, 22 billion reais in investments and 4.9 billion reais in net worth, with a presence in more than 120 municipalities. In Blumenau, the city where it was founded and hosts its institutional headquarters, 80% of the adult population are cooperative members, one of the highest rates in the country.

The performance is based on the concept of Cooperative Economics, which measures how much a member saves by accessing lower interest rates, reduced fees, and fairer returns. The estimate that, in 2025 alone, this mechanism will have injected approximately 4 billion reais into the economies of Santa Catarina, Paraná, and Rio Grande do Sul.

'When we offer fairer financial solutions, we ensure that the cost difference remains in the hands of those who produce and undertake business

Aurora Coop: The giant has fourteen affiliated cooperatives and 87,000 rural families



LEANDRO FONSECA

NATIONAL HIGHLIGHT

Membership vs. Population

■ Brazil ■ Santa Catarina

Population



Membership



% cooperative members



Sources: OCB and IBGE Co-op Yearbook 2025.

ventures. This revenue goes back into the local economy,” says Adelino Sasse, Chief Product and Business Officer at Central Ailos.

In this scenario, the advantage offered by cooperatives goes beyond the interest rate. It lies in the distribution of surplus back to the members themselves and in the deep-rooted territorial ties. FinTechs may be fast and efficient, but they do not distribute profits or reinvest locally. In cooperative systems, financial services function as a tool for strengthening the economic well-being of communities.

The growth of financial cooperatives is a nationwide trend. The National Cooperative Credit System ended 2024 with 753 individual credit unions, serving 19.2 million members at 9,400 service points. The system manages 885.3 billion reais in assets and is growing above the average of the financial market. Cooperatives already hold 11.6% of the country's total credit portfolio.

AGRIBUSINESS: GLOBAL SCALE WITH A LOCAL BASE

In the agribusiness sector, cooperativism is a central element of Santa Catarina's competitiveness. The state is the second largest producer and exporter of poultry and the national leader in swine production—a performance sustained by organized production, technical assistance, cooperative governance, and continuous investment throughout the entire supply chain.

In western Santa Catarina, Aurora Coop symbolizes the maturity of Brazilian agro-industrial cooperatives. The third largest agro-industrial group of animal proteins in the country, the cooperative acts as the central unit of a network formed by fourteen affiliated cooperatives, involving more than 87,000 families in the countryside and supporting one of the most sophisticated production chains in the national food industry.

Aurora processes 1.3 million poultry units and 32,000 swine daily. This scale is made possible by a vertically integrated system merging automation with robust technical support and cooperative management. Since joining the National Humane Slaughter Program in 2008, the cooperative has invested approximately 1.4 billion reais in improvements related to animal welfare, industrial automation, genetics, nutrition, and producer training.

These investments resulted in significant efficiency gains. International certification studies show a productivity boost of up to 30%, alongside lower mortality and enhanced meat quality, all of which are critical to maintaining Brazil's competitive edge in global markets.

A new requirement has raised the bar even higher in the sector: The adoption of rigorous animal welfare protocols, increasingly demanded by consumers and importers. Research from the National Sanitation Foundation (NSF) shows that 73% of

global consumers consider it important to know how animals were raised, treated, and transported before reaching the point of sale—a factor that already influences purchasing decisions and international contracts.

‘Animal welfare is not just a market requirement, but a commitment to production efficiency, sustainability and the income of the cooperative member,’ says Neivor Canton, president of Aurora Coop. ‘When animals develop without stress, supported by proper management and technology, everyone wins: The producer, the industry, the consumer, and the territory where that production takes place.’

The financial figures reflect this strategy. In 2024, Aurora recorded gross operating revenue of 24.9 billion reais, a growth of 14.2%, and net revenue of 22.8 billion reais, an increase of 13.5%. The surplus totaled 880.5 million reais, an amount that is returned to the members or reinvested in the system, strengthening the regional development cycle.

International operations have also progressed. Revenue from exports grew 23.7%, totaling 9.1 billion reais, while the domestic market accounted for 63.6% of revenue. In 2024, the cooperative was responsible for 21.6% of Brazilian pork exports and 8.4% of poultry exports, notably characterized by its low reliance on the U.S. market.

‘Growing in the global market is a priority in our strategic planning,’ says Canton. To support this movement, Aurora inaugurated a corporate export unit in Itajaí (SC) and is preparing to open its first

international unit in Shanghai—a decisive step in consolidating the cooperative as a global food player.

A FUTURE-READY MODEL

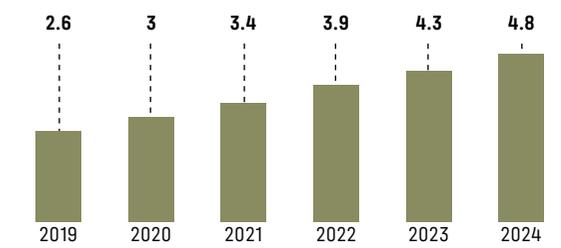
Despite its prominent role, cooperatives face challenges. One of them is to integrate the model in a more structured way into public policies, as an instrument for economic development and financial inclusion. Another one is generational. Attracting young people to the system, especially in credit, has become urgent in light of the expansion of fintechs.

By combining economic efficiency, democratic governance, and territorial roots, Santa Catarina has built a unique development model. In credit and agribusiness, the two largest sectors—the state proves that it is possible to grow, distribute gains, and keep wealth circulating where it is generated. A model that proves that cooperation and economic development are not a coincidence. They are a project. ●

The countryside of Santa Catarina: Immigration was the basis for communities that triumphed with cooperation

COLLECTIVITY ON THE RISE

Evolution of the number of cooperative members in Santa Catarina (in millions)



MORE MONEY IN THE LOCAL ECONOMY

5.5 billion reais

were injected into the Santa Catarina economy from what are known as cooperative ‘surplus.’

LABOR MARKET

The cooperative sector employs

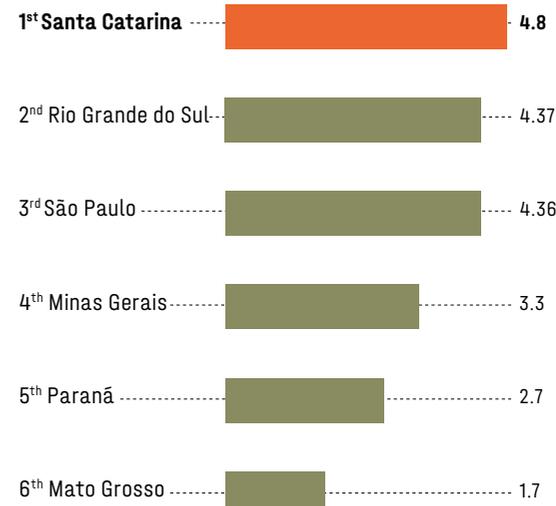
81.000 people in Santa Catarina.

Source: Co-op Yearbook 2025 – OCB System.

SANTA CATARINA AT THE TOP

Ranking of cooperative members by state

(in millions of inhabitants)



Source: Co-op Yearbook 2025 – OCB System.



THIAGO KAUÊ

TOURISM BEYOND

THE BEACH

WITH RECORD NUMBERS OF VISITORS, SANTA CATARINA IS ESTABLISHING ITSELF AS A DESTINATION THAT GOES BEYOND THE COAST. WITH PLANNING, TOURISM HAS BECOME AN ASSET THAT INJECTS 4.2 BILLION REAIS INTO THE STATE'S ECONOMY

RAFAEL MARTINI

The landscape of Santa Catarina: Events, gastronomy and nature form a multifaceted destination for global travelers



JONATA ROCHA

SANTA CATARINA IS EXPERIENCING A UNIQUE MOMENT IN TOURISM. The state received 651,980 international tourists between January and November 2025, an increase of almost 57% compared to the same period in 2024. The increase was driven primarily by Argentina, with 417,958 arrivals and a rise of 73.03%, followed by Chile, which recorded 178,003 arrivals, an increase of 32.23%. There was also an increase in flows from Paraguay, with 8,273 foreign visitors (+75.39%), and from the United States, with 5,483 international tourists, a growth of 4.26% compared to the previous year.

The performance is a direct result of a well-coordinated international promotion strategy. Throughout

2025, the government of Santa Catarina, through the State Secretariat of Tourism, headed by Catiane Seif, held roadshows, promotional events, and business meetings in countries that maintain direct air routes with the state. These actions broadened relationships with travel agents and tour operators, strengthened commercial agreements, and helped position Santa Catarina as a competitive destination in source markets, especially in South America.

‘Santa Catarina has managed to build a reputation as a reliable and competitive destination in all four seasons and in various regions of the state, as we are seeing now with the growth of occupation in the Mountains, even during the Summer,’ says Seif.

‘Our work has been to structure tourism as a development policy, expand connectivity, improve the quality of services, and consistently promote the state around Brazil and abroad. It is not just about increasing the flow of visitors, but about improving the tourist profile, extending the length of stay, and distributing income among different regions, reducing the historical dependence on the peak summer season,’ explains the Secretary of Tourism.

This transformation is neither recent nor accidental. Known nationally for its coastline stretching from north to south, the state has begun to explore, with method and a long-term vision, a less seasonal tourism model. Public safety above

the national average, organized infrastructure, world-class theme parks, professional events, experiential tourism, high-altitude wine production, and well-structured winter destinations now make up an ecosystem that operates continuously and in an integrated manner.

In 2025, tourism injected approximately 4.2 billion reais into the Santa Catarina economy, considering spending on accommodation, food, transportation, leisure, commerce, and services. More than just numbers, the performance reflects a structural change: Tourism has ceased to be merely a natural vocation and has become a planned economic asset, with a direct impact on employment, revenue, and regional development.

AN INTERNATIONAL LEAP THAT IS OUT OF THE ORDINARY

The growth in foreign tourism has placed Santa Catarina among the Brazilian destinations that have made the most progress in the recovery of international tourism. Besides its geographical proximity to Mercosur countries, the state has benefited from the expansion of air routes, coordinated promotion abroad, and its image as a safe and organized destination—an attribute increasingly valued on the global stage, especially in a context of gradual resumption of international travel.

For the state government, the strategy involves extending the length of visitors’ stay and stimulating consumption in different regions. The economic logic is straightforward: The longer the stay, the higher the average expenditure and the more evenly distributed income become among municipalities, favoring local production chains, small entrepreneurs, and regional economies.

The growth of international tourism in Santa Catarina is directly supported by the expansion of air connectivity. Zurich Airport Brasil, the concessionaire managing Florianópolis International Airport, presented its flight network for the 2025/2026 Summer season, which is set to be the largest in the terminal’s history.

The standout sector is the international market, which is expected to account for 38% of total passengers between December 2025 and March 2026, a 19% increase compared to the previous season. In total, there will be 12 international routes, connec-

Praia do Rosa, in Imbituba [SC]: The state attracts tourists in the four seasons of the year



THIAGO KAUÉ

ting Santa Catarina to countries in South America, the Caribbean, and Europe. Ten airlines will operate up to 68 international flights in a single day, significantly expanding the terminal's capacity during the peak summer season.

Among the largest source markets, Buenos Aires leads with up to 30 daily flights, reinforcing Argentina's role as the state's primary international market. Besides the capital, there will be flights from Córdoba, Rosario, Salta, and Tucumán—the latter two being new routes operated by Aerolíneas Argentinas, expanding the reach of the air network to the interior of Argentina.

The network is also expanding beyond Mercosur. One of the main new features is the regular route to Lima, Peru, with three weekly frequencies, operated by LATAM. Copa Airlines will expand its service

on the route connecting Florianópolis to North America and the Caribbean, via Panama, with five flights per week between December and January.

Projections solidify the Santa Catarina terminal as the third busiest airport in Brazil in terms of international traffic, behind only Guarulhos (SP) and Galeão (RJ).

'The summer flight schedule points to a historic season,' says Ricardo Gesse, CEO of Zurich Airport Brasil. 'Floripa Airport is expanding the diversification of its offerings, with approximately 10% of its international passengers coming from outside Mercosur, demonstrating the airport's growth in more distant markets.'

EVENTS AS A PERMANENT ECONOMIC ENGINE

Event-based tourism is one of the pillars of this model. Over the past few decades, Santa Catarina has built a calendar capable of sustaining hotels, bars, restaurants, transportation, and commerce even outside of peak season, reducing dependence on Summer and ensuring greater predictability for the sector.

The greatest symbol of this transformation is Oktoberfest Blumenau, which in 2025 recorded its best performance in history. Over the course of 19 days, 689,201 people passed through Vila Germânica Park. It was the largest number recorded since the adoption of the turnstile access control system. On one of the Saturdays, the event received 81,277 visitors, with tickets sold out.

The progress went beyond the public. The 2025 edition achieved a record profit of 12.1 million reais, surpassing the 9.6 million reais of the previous year, and total revenue of 35.6 million reais. The number of sponsors reached 34 brands, with investments of 17.1 million reais, while the food sector broke records, with more than 621,000 items sold.

'What we are seeing is the consolidation of a brand that has undergone a profound transformation,' says Guilherme Benno Guenther, General Director of Oktoberfest Blumenau. 'The festival has ceased to be merely a cultural event and has become a structured tourism product, focusing on experience, professionalism, sustainability, and national and international projection.'

The impact is spreading throughout the Itajaí Valley. During the event period, hotel occupancy rates increase not only in Blumenau, but also in cities like Pomerode, Indaial, and Timbó, reinforcing the logic of integrated regional tourism.

A THEME PARK IN THE HEART OF THE COAST

The diversification of tourism in Santa Catarina is even more evident in Penha, a coastal city about 110 kilometers from Florianópolis. That is home to Beto Carrero World, the most visited theme park in Latin America.

HISTORIC NUMBER OF FOREIGN VISITORS

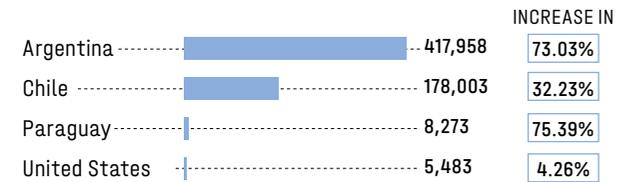
651.980

international tourists visited SC between January and November 2025

+57%

compared to the same period in 2024

Main source markets (in number of tourists)



Sources: Embratur, Ministry of Tourism and Federal Police.

Created in 1991 by João Batista Sérgio Murad, the park occupies 14 million square meters, the equivalent of about 2,000 football fields. Beyond traditional rides like roller coasters and Ferris wheels, the park's differentiation strategy focuses on live entertainment and strategic partnerships with global brands, including Nerf, Hot Wheels, and Madagascar.

In 2024, it announced a partnership with the Galinha Pintadinha Brazilian franchise to create a new themed children's area, with an estimated investment of 50 million reais. That same year, approximately 2.5 million people visited the park, surpassing traditional national competitors and exceeding the annual visitor numbers of international parks.

'The park has ceased to be a regional destination and has become a tourist asset of international scale,' says Alex Murad, CEO of Beto Carrero World. 'Today, it functions as an entertainment industry, with a direct impact on the regional economy, job creation, and attracting tourists from all over Brazil and abroad.'

HIGH-ALTITUDE WINES WITH REGIONAL IDENTITY.

Inland, Santa Catarina has invested in sophistication and added value. The high-altitude wineries, located mostly in the Mountains region, have transformed the state into one of the main national references in the



Wine appreciation: Santa Catarina is home to more than 30 high-altitude wineries

PROMOTIONAL MATERIAL

TOURISM

production of fine wines. Produced above 900 meters, these labels benefit from a wide thermal amplitude and slow grape ripening, factors that contribute to greater aromatic complexity.

Currently, the state is home to more than 30 high-altitude wineries, with an estimated annual production of over 1 million bottles. Among the main highlights are Villa Francioni Winery, Pericó Winery, Leone di Venezia Winery, and Thera Winery, all of which have won awards in international competitions such as the Decanter World Wine Awards and the Concours Mondial de Bruxelles.

The sector's growth has also boosted wine tourism. Guided tours, tastings, restaurants, and integrated accommodations have become part of the business model. In some properties, tourism already accounts for up to 30% of revenue, serving as a significant complement to the sale of wine labels.

POMERODE: CULTURAL IDENTITY AND FAMILY TOURISM

In the Itajaí Valley, Pomerode has established itself as one of the most consistent examples of experiential tourism in Brazil. Known as the most German-influenced city in Brazil, Pomerode has leveraged its cultural heritage as a structured economic asset, combining traditional cuisine,

preserved architecture, and themed events throughout the year.

One of the main attractions is the Pomerode Zoo, the largest in Santa Catarina, which acts as an anchor for family tourism. The facility extends the visitor's length of stay, boosts the hotel industry, restaurants, and local commerce, and also serves as a center for environmental education.

THE WINTER ECONOMY

While the coast still holds the image of tourism in Santa Catarina, it is in the mountains that the state is showing that it is also possible to build a high season in the Winter. Destinations like Urubici, São Joaquim, and Urupema have transformed intense chilly weather into a premium tourism product.

Urubici has established itself as a major hub, with robust growth in the supply of guesthouses, charming accommodation, and nature tourism. São Joaquim and Urupema, frequently registering the lowest temperatures in Brazil, evoke the charm of snowy landscapes and support an economic chain based on mountain gastronomy, high-altitude wineries, and Winter experiences.

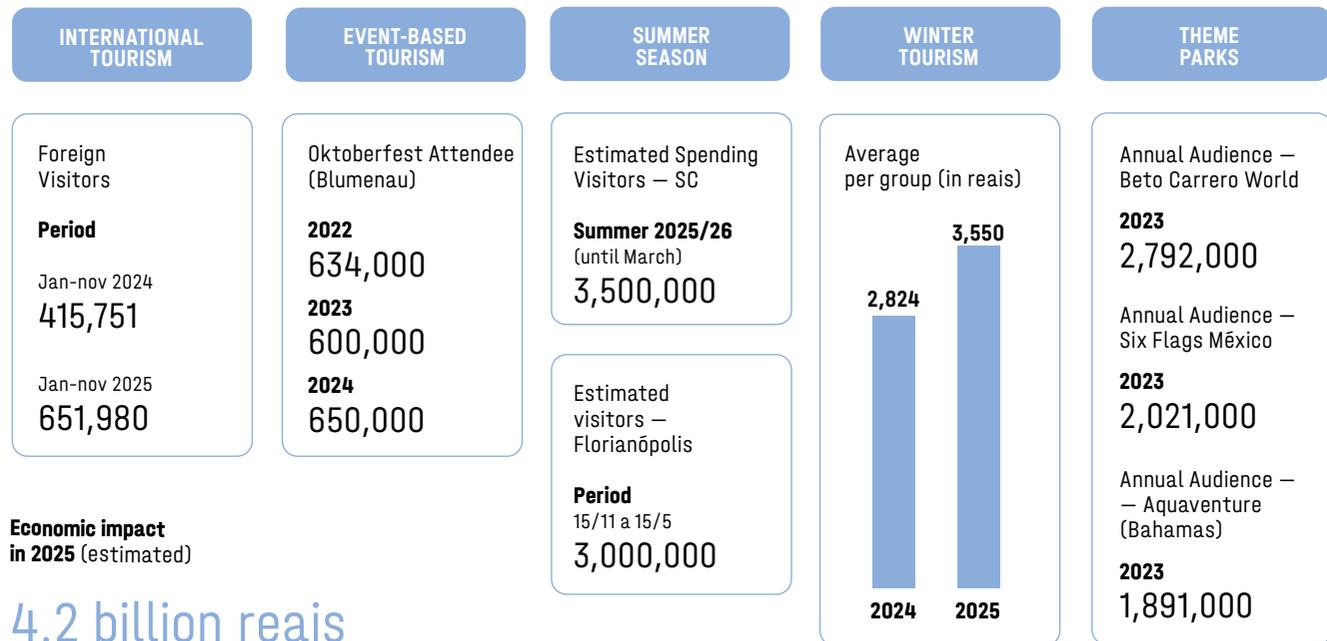
Closer to the capital, Rancho Queimado serves as a gateway to this circuit, connecting the coast and the mountains in a single itinerary.



Oktoberfest: Festival in Blumenau breaks visitor records with a more family-friendly atmosphere

SANTA CATARINA: DESTINATION FOR ALL SEASONS

Tourist options range from snow to one of the nation's most stunning coastlines



A MODEL THAT IS SOLIDIFYING

The sum of these factors helps explain why Santa Catarina has become a unique case in Brazilian tourism. The state managed to mitigate its reliance on seasonality, better distribute the flow of visitors throughout the year, and transform diversity into a long-term economic strategy, with direct impacts on employment, income, and revenue.

More than just exploiting natural attributes, Santa Catarina has consolidated tourism as a structured economic driver with measurable results. If in 2025 the state received more than 650,000 international visitors, with growth exceeding 50% compared to the previous year, breaking records for foreign flow, the summer season of 2026 also confirms that the numbers will be extremely positive. With efficient strategic planning, a permanent events calendar, and

mature tourism assets, the state has built a more predictable, resilient model that is integrated into its development strategy.

In practical terms, this means greater predictability for investors, entrepreneurs, and industry operators. Hotels, restaurants, parks, wineries, transportation companies, and service providers began operating with a longer-term perspective, reducing their dependence on a few peak season months, and creating more resilient supply chains.

The advance also reinforces the inland expansion of tourism. Regions historically outside the traditional tourist circuit have begun to capture a sizable portion of the visitor flow, whether through winter tourism, wine tourism, cultural appreciation, or nature-related experiences. As a result, the income generated by the sector is spread more evenly across the state. ●

Port of Itajai: Port investments in Santa Catarina are set to exceed 57 billion reais by 2030



BRASSTOCK IMAGES/GETTY IMAGES

A LOOK INTO THE FUTURE

NEW STRUCTURAL PROJECTS WILL POSITION SANTA CATARINA AS A KEY PLAYER IN THE GLOBAL RACE FOR INVESTMENT AND BUSINESS

LUCIANO MANENTI

UNFORTUNATELY, INFRASTRUCTURE PROJECTS IN BRAZIL ARE STILL OFTEN ASSOCIATED with delays, litigation, and broken promises. Santa Catarina is doing things differently. Right now, a series of investments in ports, airports, roads, and railways is underway—and at an accelerated pace—with the potential to increase the state’s competitiveness and reposition it as one of the most efficient logistics hubs in the country. It makes sense. In a

world of fragmented supply chains, recurring geopolitical tensions, and rising transportation costs, infrastructure is increasingly becoming a strategic asset, capable of influencing companies’ and investors’ decisions about where to stay—and where to retreat from.

The most emblematic example of these investments is the dredging and deepening of the access channel to Babitonga Bay, where strategic terminals such as the Port of Itapoá and the Port of São Francisco do Sul are. The project is noteworthy not only for its logistical impact, but also for the way the works were implemented, in a model considered unprecedented in Brazil.

Unlike traditional concessions or classic public-private partnerships, the project was made possible through a direct contractual arrangement between a public port and a private terminal. Port of Itapoá advanced 324 million reais for the dredging, which is under the execution of the state-run São Francisco do Sul Port Authority. Reimbursement will occur over time, exclusively from the future increase in revenue that the expansion of the canal’s capacity will provide to the Port of Itapoá.

‘When you put more water in the channel, the ship can navigate with more containers,’ says Ricardo Arten, CEO of Port of Itapoá. ‘This reduces the cost per unit because the shipping company spreads the cost of the trip across 14,000 containers instead of 8,000, and some of this efficiency is passed on to the freight’.

Another benefit of the project: Around half of the 12.5 million cubic meters of sand that should be extracted by the end of the dredging will be used to replenish 8 kilometers of Itapoá Beach (which is already underway).

It is expected that this increase in capacity positions the Port of Itapoá as a priority for shipping companies—that is, the chosen location for a ship’s first stop on an international route, a decision that is more economic than geographical. The port that receives the ship first sets the pace for the entire operation: The earlier and faster the docking occurs, the greater the capacity to unload empty containers, load export cargo, and redistribute smaller ships to subsequent calls. Nowadays, this first stop usually falls on the Port of Santos. ‘With a deeper draft and greater capacity, we now have better operational conditions,’ says Arten. As Brazil’s major ports face persistent bottlenecks, Santa Catarina’s operational capacity stands out as a high-value strategic advantage. ‘The state-of-the-art terminals in the country are quite saturated,’ he says. ‘With our increased domestic capacity, importers and exporters will not encounter the same difficulties here that they currently face in Santos or Paranaguá’.

In other words, without creating new tariffs and without impacting on the current cash flow of the public port. The model overcomes two historical

bottlenecks in infrastructure investment in Brazil: The scarcity of public resources and the slow pace of conventional concessions, which can take years—or decades—to materialize. The governance model adopted in Babitonga Bay has established a framework of legal certainty, regulatory predictability, and institutional trust. By doing so, Santa Catarina fast-tracked a critical infrastructure project without burdening exporters and importers with additional costs.

NEW PORTS, INVESTMENTS ON AN UNPRECEDENTED SCALE

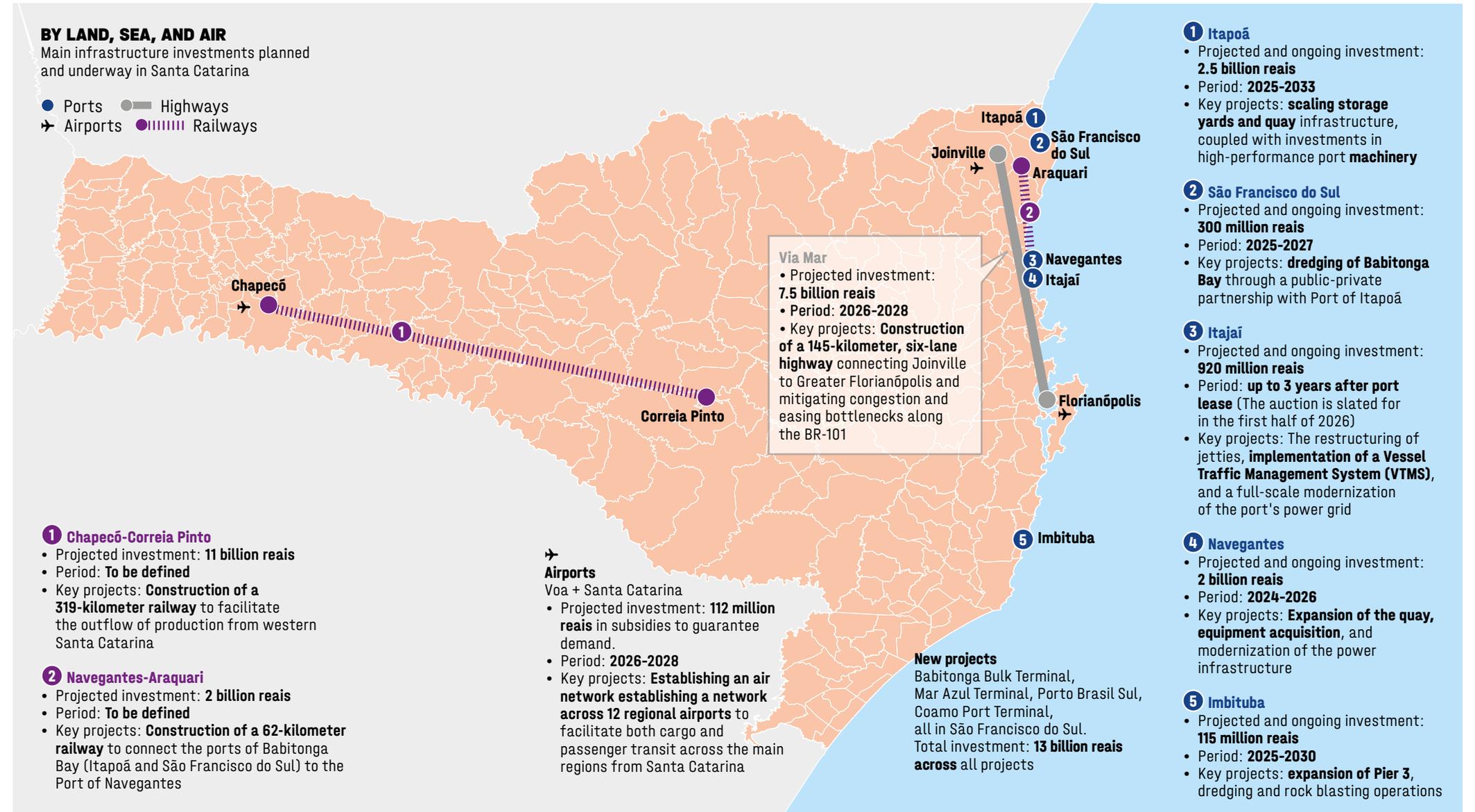
The dredging of Babitonga is part of a broader cycle of port investments that should transform Santa Catarina into one of the states with the greatest installed capacity for cargo handling by the end of the decade. The state is on track to operate up to eight organized ports or strategic terminals by 2030, supported by a portfolio of logistics projects estimated at around 57 billion reais.

This amount accounts for not only investments in expanding existing ports and terminals, but also the construction of new ones. This is the case with the Babitonga Bulk Terminal (Terminal Granelheiro da Babitonga, TGB) in São Francisco do Sul, the Mar Azul Terminal (in the same region), and Porto Brasil Sul, also in São Francisco do Sul, which is currently one of the largest projects in the country. Completing this set is the Coamo Port Terminal, also in Babitonga, which focuses on GLP, bulk cargo, fuels, and fertilizers.

At the Port of Itapoá, in the current expansion phase, 500 million reais are being invested, with the broadening of storage yards and the acquisition of new equipment—such as portainers (the equipment that transfers cargo between ships and the dock), scaling of power outlets for connecting refrigerated containers, and automation. The next phase involves raising the total investment to approximately 2.5 billion reais, including the construction of a new berthing dock, which will provide an increase of approximately 50% in the terminal’s capacity.

Not far from there, in Navegantes, the Portonave container terminal is carrying out investments exceeding 1.5 billion reais to deepen the draft, expand the quays, and acquire large-scale equipment, preparing the terminal to handle ever-larger vessels and support the growth of the export industry in southern Brazil. ‘Our competition is quite intense with the ports of Paranaguá, Itapoá, and also with Santos,’ says Osmari de Castilho Ribas, Managing Director of Portonave. ‘What we seek is to maintain operational standards, a balance between investment, layout, technology, and an efficient team.’

Physical infrastructure gains are bolstered by a key differentiator: Operational efficiency. In this respect, the terminals in Santa Catarina present indicators that rival (and in some cases, surpass)



those of Port of Santos, the largest port complex in Latin America.

Portonave operates with averages exceeding 110 moves per hour (MPH), a level considered excellent even by international benchmarks. The average time trucks spend at the terminal is among the shortest in the country, a result of investments in automation and operations management.

At the Port of Itapoá, the introduction of new portainers increased productivity by approximately 15% in the first month of operation. Today, the container terminal is one of the three largest in Brazil in terms of cargo handling—and the leader in growth, according to data from the National

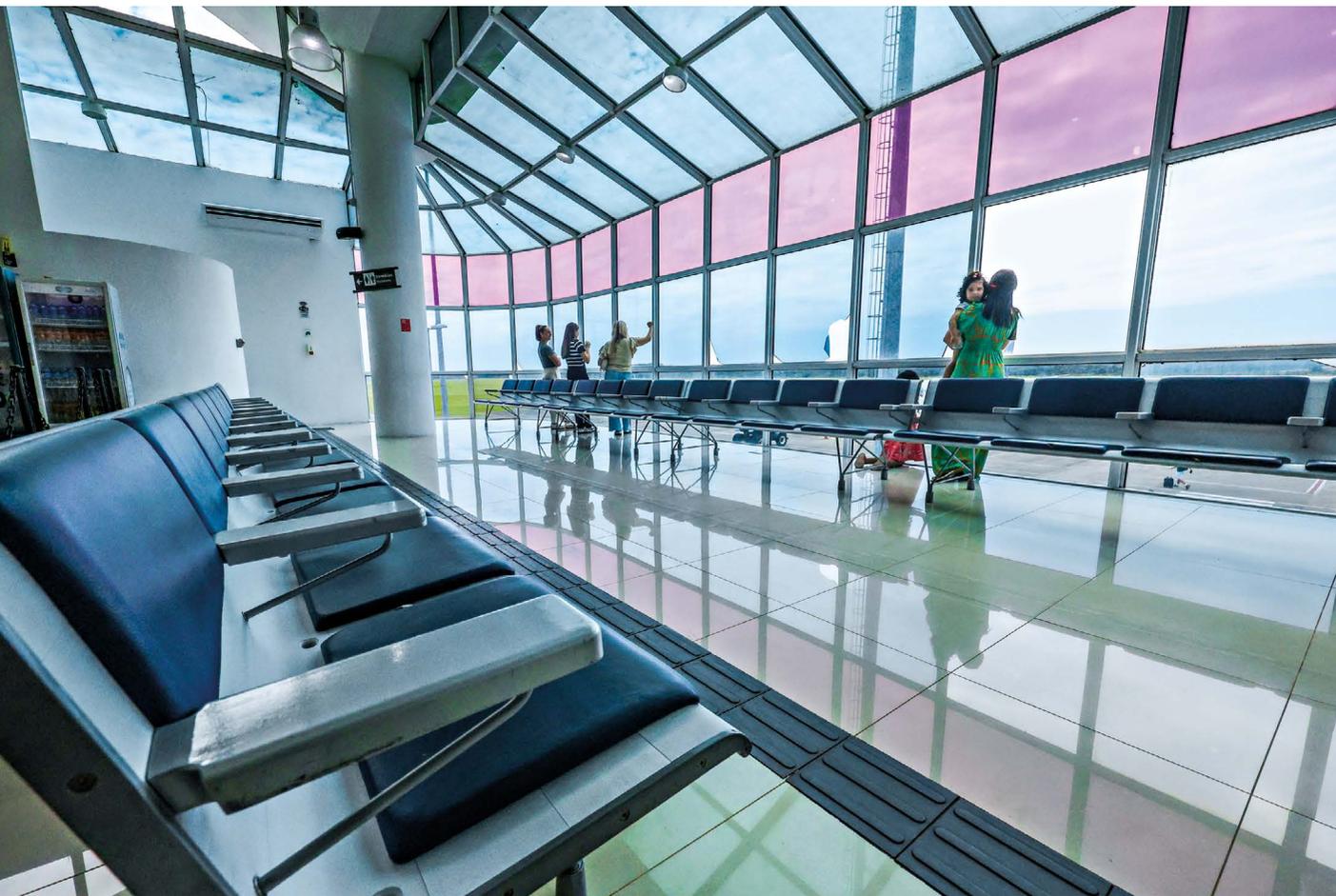
Waterway Transportation Agency. In Santos, on the other hand, there are limitations caused by saturated road and rail access, urban restrictions, and greater difficulty in rapidly expanding capacity.

Another distinguishing feature of the Santa Catarina model is the coordination between projects. Ports, highways, regional aviation, and railway studies are progressing as parts of the same chessboard, not as isolated projects. Expanding port capacity, for example, only makes sense when accompanied by land access capable of absorbing the increased traffic.

In this regard, there is an expectation that investments in railways will be unlocked in the coming months. The state government is preparing the de-

tailed engineering designs for two new railway lines that will connect to the Southern Railway Network, operated by Rumo. The first one goes from Chapecó, in the West, to Correia Pinto, in the Planalto region. The other one starts in Navegantes and goes as far as Araquari. Furthermore, Port of Itapoá produced a feasibility study, delivered to the state government, for the construction of a rail loop also connecting the Southern Rail Network to the port.

Similarly, new air routes gain economic relevance when they connect production hubs to decision-making and financial centers. This systemic view reduces the risk of underutilized investments—a recurring problem in Brazilian infrastructure.



THIAGO KAUE

Jaguaruna Airport:
Investment of 70 million
reais in 30 years

Therefore, the logistics strategy in Santa Catarina goes beyond just transporting cargo. One of the most innovative initiatives is Voa + Santa Catarina (Fly More Santa Catarina), a state program for regional aviation that is being designed to integrate production hubs using small aircraft (with up to 19 seats) and reduce travel time within the state—especially for those traveling on business. The proposal envisions using 12 regional airports—such as those in Forquilha (in the south of the state), Lages (in the Mountains), Xanxerê (in the West) and São Francisco do Sul (in the North)—probably using Florianópolis Airport as the model’s hub.

The framework entails administrative concessions and operational incentives, whereby the state provides initial demand guarantees through seat-purchase agreements until the routes reach commercial viability. The logic is similar to that adopted in countries with strong regional avia-

tion: To stimulate connectivity as an instrument for development, not merely a response to existing demand. There is also the possibility of interstate connections to other airports in Paraná or Rio Grande do Sul, expanding the economic reach of the program.

The surge of aviation and aerospace investments is now being matched by a major push on the ground. In recent years, the state has consistently increased investments in state highways, with duplications, restorations, and capacity expansions on strategic axes that connect industrial centers to ports and airports.

In northern Santa Catarina, one of the roadworks projects in the current investment cycle is the duplication and upgrading of a strategic corridor on the border with Paraná, approximately 20 kilometers long, connecting the Garuva region to the industrial hub of Joinville and the Paraná highway network. The funds, amounting to approximately

370 million reais, originate from an agreement between the two states regarding the sharing of royalties from oil extracted in an area that both states disputed as being part of their territorial sea. Paraná and Santa Catarina opted to convert the liability into investment: The resources were transferred so that the Santa Catarina government could directly execute the works. The result is a dual carriageway highway, with new safety features and increased traffic capacity.

The most ambitious road project, however, is Via Mar. Designed as a new highway parallel to the BR-101, this project aims to eliminate one of Santa Catarina’s primary logistical hurdles: The persistent congestion plaguing the state’s main northern coastal corridor.

‘The Via Mar Highway will help relieve traffic on BR-101 and, as a result, allow the flow of cargo entering and leaving the state, imports and exports,’ says Renato Lacerda, President of InvestSC, the investment agency of Santa Catarina. ‘This is what will make the difference in the future’

The planned route creates an alternative corridor that runs from Joinville to Greater Florianópolis, serving as a midway link to cities such as Itajaí and Balneário Camboriú. The project will have a direct impact on the flow of port cargo and urban mobility in the cities crossed by the BR-101 highway.

The government intends to begin construction on the first section, in the north of the state, sometime in 2026. The model under study combines initial public execution and subsequent concession to the private sector, allowing for faster project completion and risk distribution. For industry and logistics operators, the expected gain is predictability. ‘The first section of Via Mar should begin with a public contract awarded by the Infrastructure Secretariat,’ says Lacerda of InvestSC. ‘From that point, the idea is to structure the project for an auction of the remaining lots, using a public-private partnership model with a concession fee’

A NEW LEVEL OF COMPETITIVENESS

When all these initiatives are ready, Santa Catarina will be able to position itself as a national logistics hub, capable of competing directly with the largest port complexes in the country. By reducing costs, increasing predictability, and accelerating critical investments, the state is anticipating a scenario in which tax incentives lose relevance, and in which competition between territories is decided by productivity, infrastructure, and institutional quality.

More than just resolving historical bottlenecks, the ongoing projects send a clear signal to the market: Santa Catarina is betting on long-term growth. ●



Itajaí Interchange on
BR-101: The construction
reorganizes the flow of
vehicles and expands
fluidity and safety
of the traffic in the region

GUILHERME BENTO/SECOM



THIAGO KAUÉ

Maravilha, SC

LUCK HAD NOTHING TO DO WITH IT

At the junction of BR-282 and BR-158, the Maravilha Interchange forms its ‘four-leaf’ pattern—a rare design in the Brazilian road network. The image captures a project accomplished through the sheer effort of the people of Santa Catarina, in a partnership between the Western municipality and the State Government. By highlighting symmetry and flow, the framing transforms engineering into a metaphor for regional planning and connection, showing that the movement and growth depicted there are the result of decision and strategy—and not the work of chance. ●

INVEST IN SANTA CATARINA.

Sources: Antaq (National Agency for Waterway Transportation); ACATE Observatory; Department of Tourism of Santa Catarina; "Safest Cities in Brazil" Yearbook; State Competitiveness Ranking; IBGE; FIESC; InvestSC.

Out of all the attractions in the state,
the biggest ones are for your company.



3 of the 10 largest ports in Brazil



18,000 technology companies



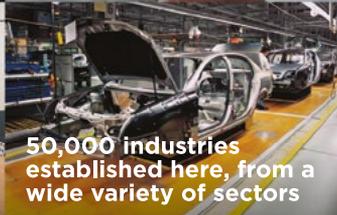
2nd state in the national competitiveness ranking



16 million tourists per year



24 innovation centers



50,000 industries established here, from a wide variety of sectors



The 6th largest GDP in Brazil, despite occupying only 1% of the national territory



Safest state in Brazil



GOVERNO DE
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