



Tea Certification Data Report 2020

Rainforest Alliance & UTZ programs

May 2021

Introduction

The main goal of this report is to present the scope and scale of the Rainforest Alliance and UTZ tea certification programs in 2020 – calendar year. The report is created to inform our stakeholders and is part of our commitment to transparency.

The report focuses on the key indicators related to:

- **Market uptake:** sales of Rainforest Alliance Certified and UTZ certified tea;
- **Program reach:** estimated Rainforest Alliance Certified and UTZ certified tea production, premiums being paid and multi-certification.

This report is part of the Rainforest Alliance monitoring and evaluation system. Most of the data in this report is collected via our online certification and traceability systems.

We do our best to ensure that all the information in this report is accurate and reliable. As much of the data is collected by third parties, we indicated where data is estimated.

Please note, this reports covers the certification data of ‘regular’ tea (*Camellia sinensis*). If you are interested in the 2020 data for UTZ certified rooibos or herbal teas get in touch with your Rainforest Alliance contact.

Summary

In 2020, the Rainforest Alliance tea program grew across most of our indicators. We saw an increase in estimated production volume (+12%), certified area (+5%), and number of certified farmers (+2%), while the number of workers remained stable. The sales of Rainforest Alliance certified tea went up slightly (+2%), which means that in 2020, 27% of tea produced as certified was sold as certified.

The UTZ tea program saw further shrinkage in 2020. The estimated production volume decreased (-18%), as well as the area certified (-10%). While the number of workers went down (-30%), we saw a growth in the number of certified farmers (+14%). Disappointingly, sales of UTZ certified tea dropped (-26%) which means that in 2020, just 6% of tea produced as certified was bought as certified.

Looking at the context of the tea sector as a whole, there is no doubt that tea businesses had to operate under very different circumstances and constraints since COVID struck in early 2020. Imports into developed tea markets fell and didn't start to recover until late 2020. In consumer markets, we see an ever more marked divide, with retail brands and retail channel product sales booming while foodservice /out of home sales have struggled due to restrictions on movement.

The premium or specialty tea sector has fared quite well – consumers in developed tea markets seem to have been willing to spend a bit more for products with a quality promise; tea's obvious health benefits as well as its reputation for promoting wellbeing position it well even in troubled times.

Geographical program reach

Latin America

Argentina
Ecuador

Africa

Burundi
Kenya
Malawi
Mozambique
Rwanda
Tanzania
Uganda
Zimbabwe

Asia-Pacific

Australia
Bangladesh
China
India
Indonesia
Japan
Nepal
South Korea
Sri Lanka
Taiwan
Turkey
Vietnam

The Rainforest Alliance and UTZ tea programs reach farmers and workers in 22 countries worldwide.

Tea Certification Data Report 2020
Rainforest Alliance and UTZ programs

■ Rainforest Alliance program ■ UTZ program ■ Rainforest Alliance and UTZ program

Program reach: Rainforest Alliance and UTZ



650 K +

Area (hectare)

Combined estimated production area



950 K+

Number of farmers

Combined number of farmers

Tea Certification Data Report 2020

 [Rainforest Alliance program](#)

 [UTZ program](#)



Rainforest Alliance Tea program

Program reach

Geographical reach

Latin America

Argentina
Ecuador

In 2020, Rainforest Alliance Certified tea was produced in 21 countries.

*Tea Certification Data Report 2020
Rainforest Alliance program*

Africa

Burundi
Kenya
Malawi
Mozambique
Rwanda
Tanzania
Uganda
Zimbabwe

Asia-Pacific

Australia
Bangladesh
China
India
Indonesia
Japan
Nepal
Sri Lanka
Taiwan
Turkey
Vietnam

Program reach



643,184

Area (hectare)

Relative growth
2019-2020:
+5%



958,528

Number of farmers

Relative growth
2019-2020:
+2%



1,367,875

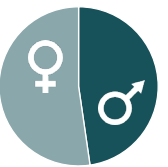
Estimated production (MT)

Relative growth
2019-2020:
+12%



734,120

Number of workers
(seasonal and permanent)



Relative growth
2019-2020:
0%

Program reach



In 2020, the estimated production area increased by 5% vs. 2019. Africa and Asia Pacific were the biggest contributors to the growth, with noticeable increases seen in Sri Lanka (+29%), China (+31%), and Taiwan (+649%).

Area (hectare)



In 2020, the number of farmers grew slightly by 2% compared to 2019, driven by increases in Latin America and Asia Pacific (although the Uganda saw the largest increase). The top 3 countries with most farmers are Kenya, Sri Lanka and Burundi (respectively 723k+, 56k+ and 50k+ farmers).

Number of farmers



In 2020, the estimated certified volume increased by 12% compared to last year. The growth was seen in all regions; Africa (+14%), Asia (+9%) and Latin America (+10%). The top 3 producing countries remained the same: Kenya, India, and Sri Lanka.

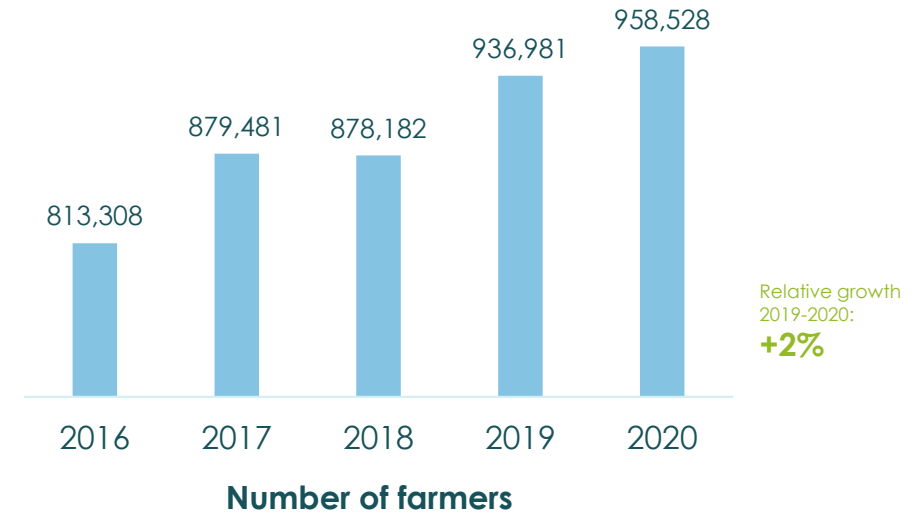
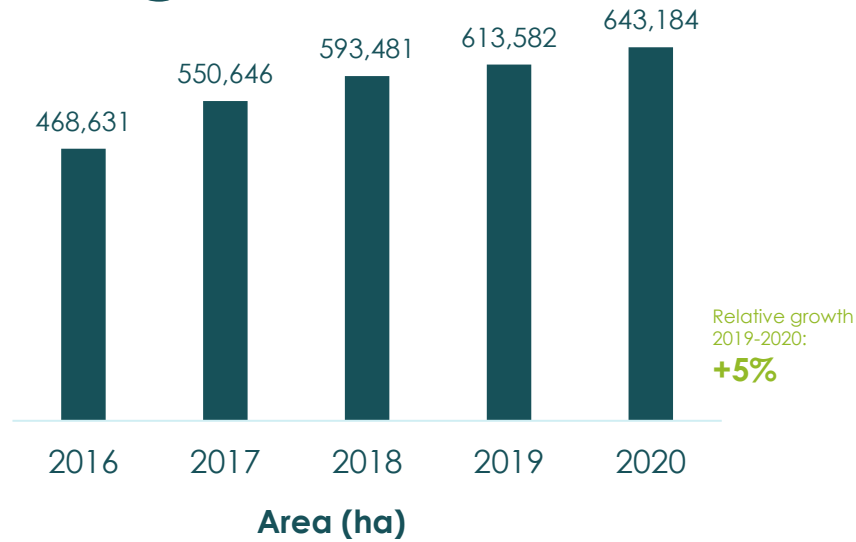
Estimated production (MT)



In 2020, the number of workers remained stable vs 2019, while the other production indicators went up. This can be attributed to more mechanized tea harvesting and COVID-19 restrictions on movement and border closures which affected employment of seasonal workers.

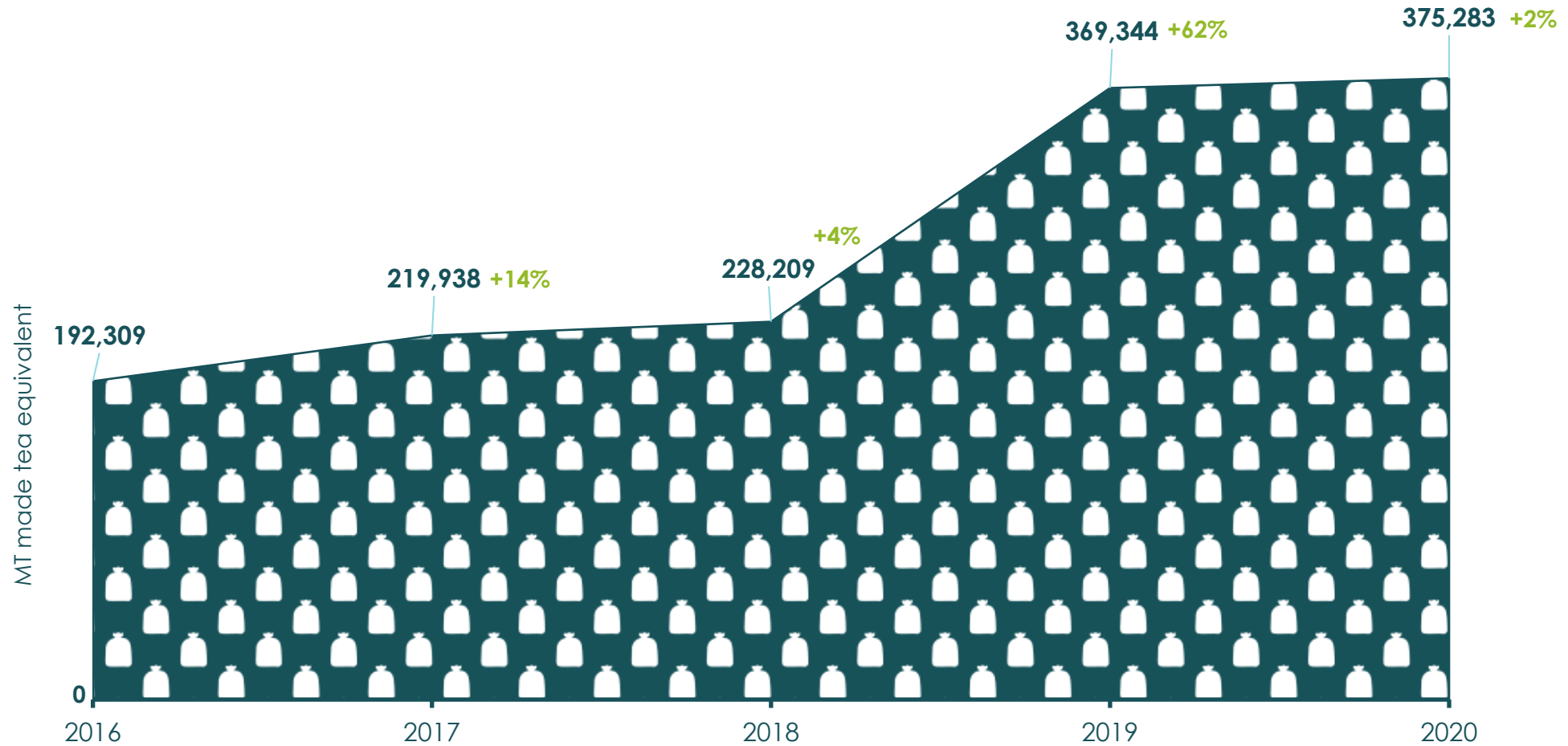
Number of workers
(seasonal and permanent)

Program reach



Global sales

Global tea sales



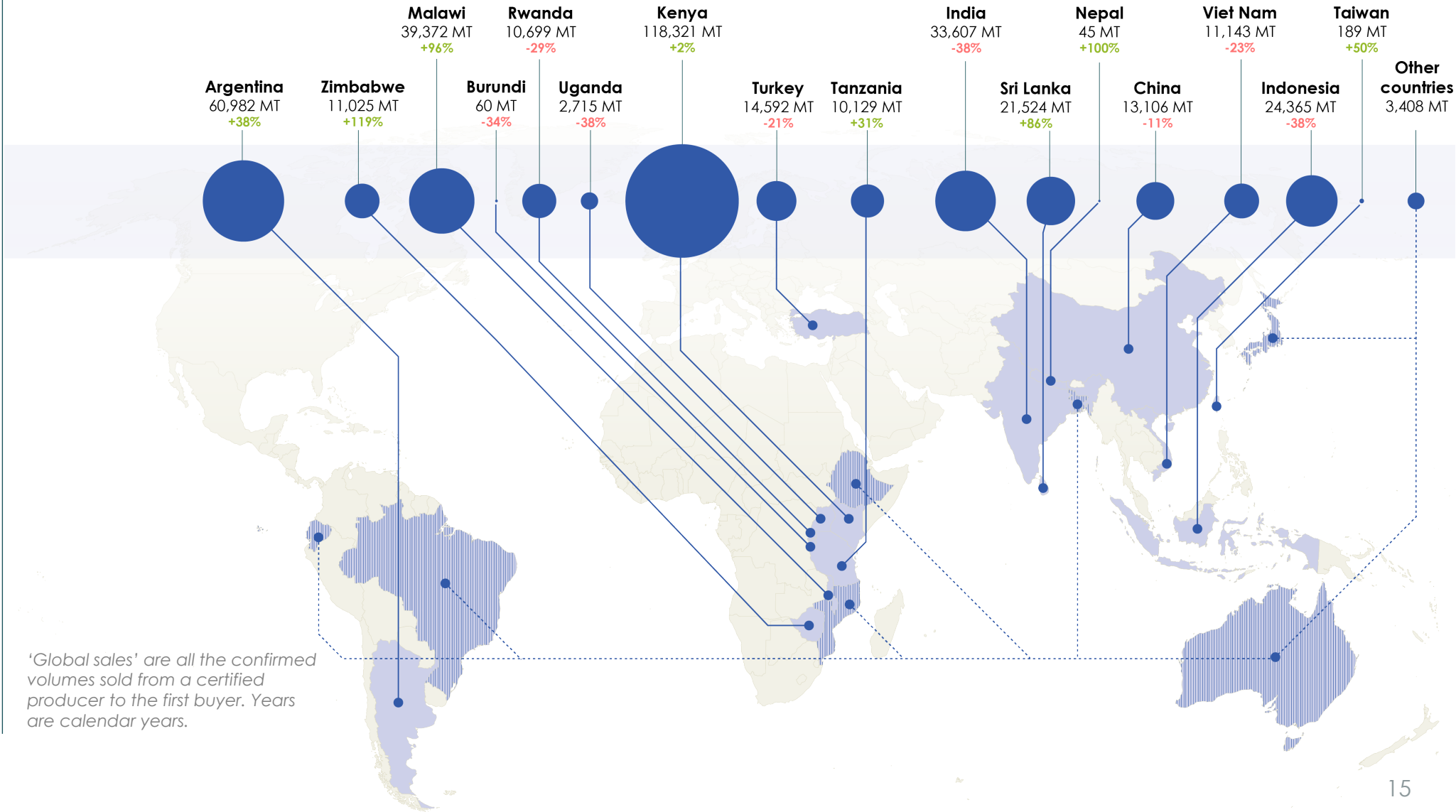
The global Rainforest Alliance tea sales saw a slight increase of 2%.

Most certified tea was sold from producers in Kenya, Argentina, and Malawi.

Tea Certification Data Report 2020
Rainforest Alliance program

'Global sales' are all the confirmed volumes sold from a certified producer to the first buyer. Years are calendar years.

Global sales per origin



The global sales increase is reflected in Latin America (+37%) and Africa (+14%) while we saw a decrease in Asia Pacific (-22%).

Tea Certification Data Report 2020
Rainforest Alliance program

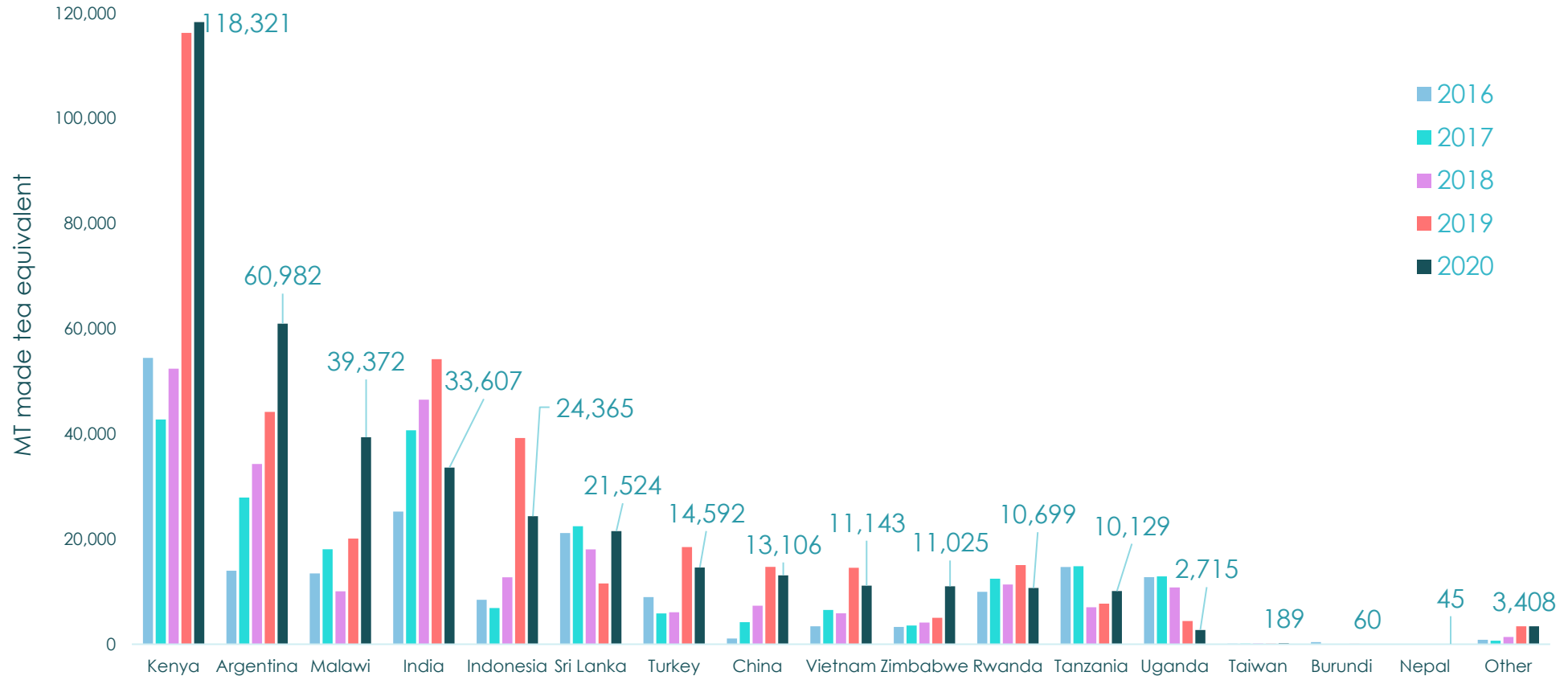
'Global sales' are all the confirmed volumes sold from a certified producer to the first buyer. Years are calendar years.

Global sales per origin

We saw important increases in tea sales from Argentina (+38%), Malawi (+96%), Sri Lanka (+86%), and Zimbabwe (+119%).

Large drops were seen in India and Indonesia (both -38%). One of the reasons is COVID-19 which affected auction sales, buyer inventories and behaviors, and export sales (most certified tea is exported, not consumed domestically). Another reason is a focus on domestic markets in Asia, with buyers sourcing more conventional and less certified tea.

Tea Certification Data Report 2020
Rainforest Alliance program



'Global sales' are all the confirmed volumes sold from a certified producer to the first buyer. Years are calendar years.

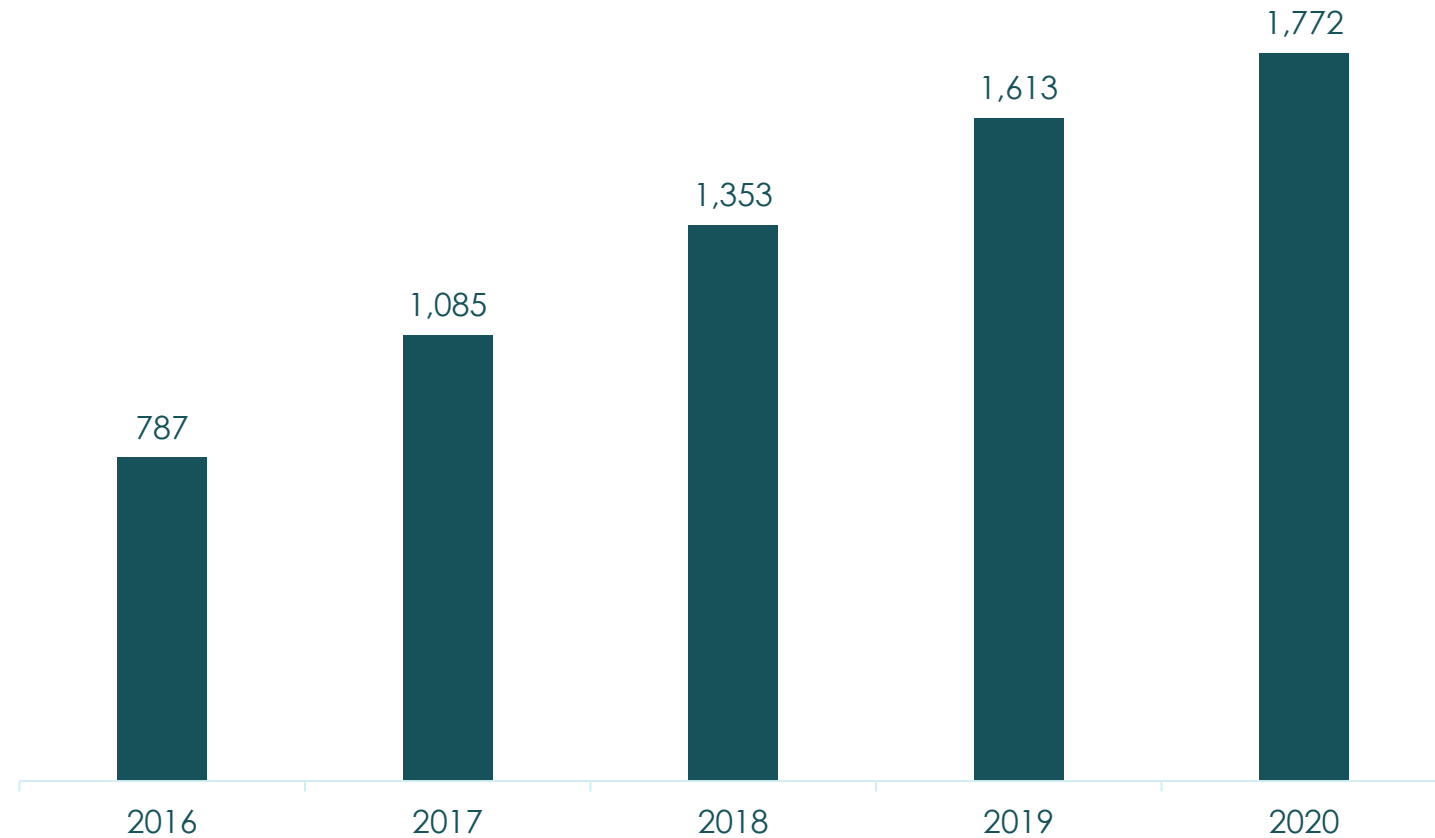
In 2020, the number of supply chain actors increased by 10% and reached 1,772. Most supply chain actors were based in Asia (801), followed by Europe (548), and North America (274).

Top 3 countries were Sri Lanka, the United States of America and India.

Supply chain actors from 8 new countries joined the Rainforest Alliance tea program: Algeria, Ghana, Nigeria, Sao Tome and Principe, Fiji, Andorra, Poland and Portugal.

*Tea Certification Data Report 2020
Rainforest Alliance program*

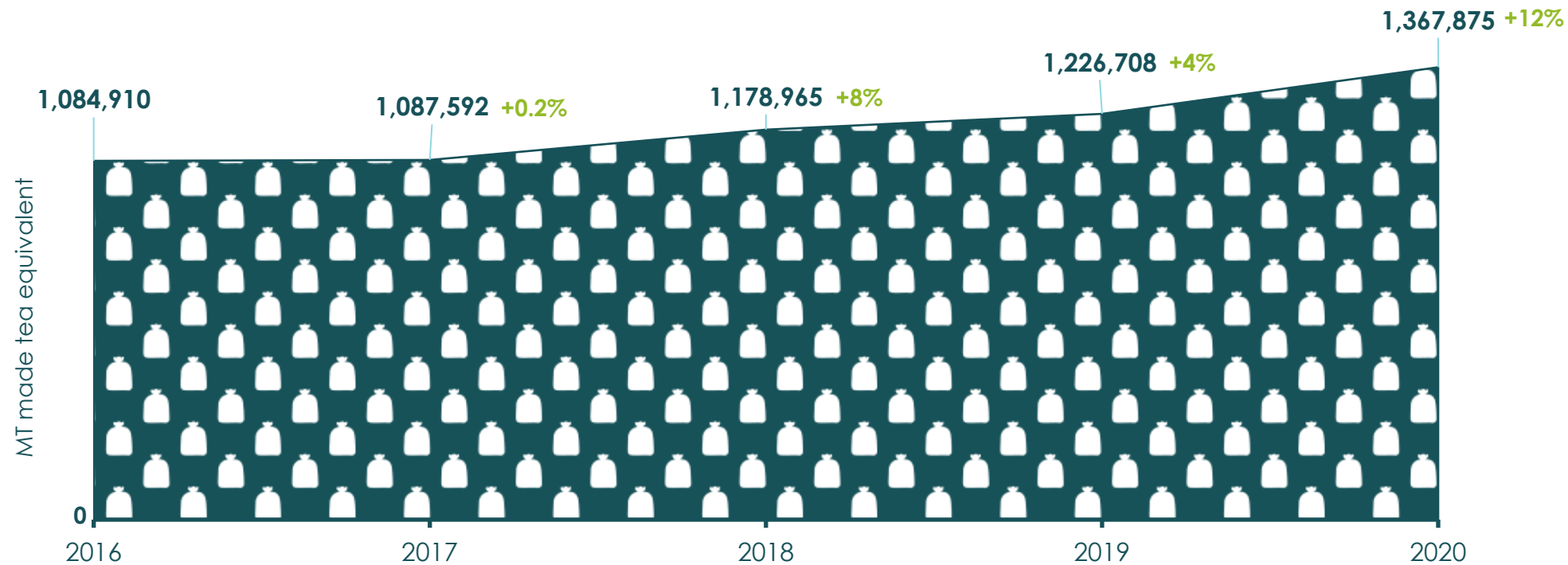
Registered supply chain actors



'Supply Chain Actors' include traders, blenders, manufacturers, retailers and brand owners.

Estimated Production

Global estimated tea production

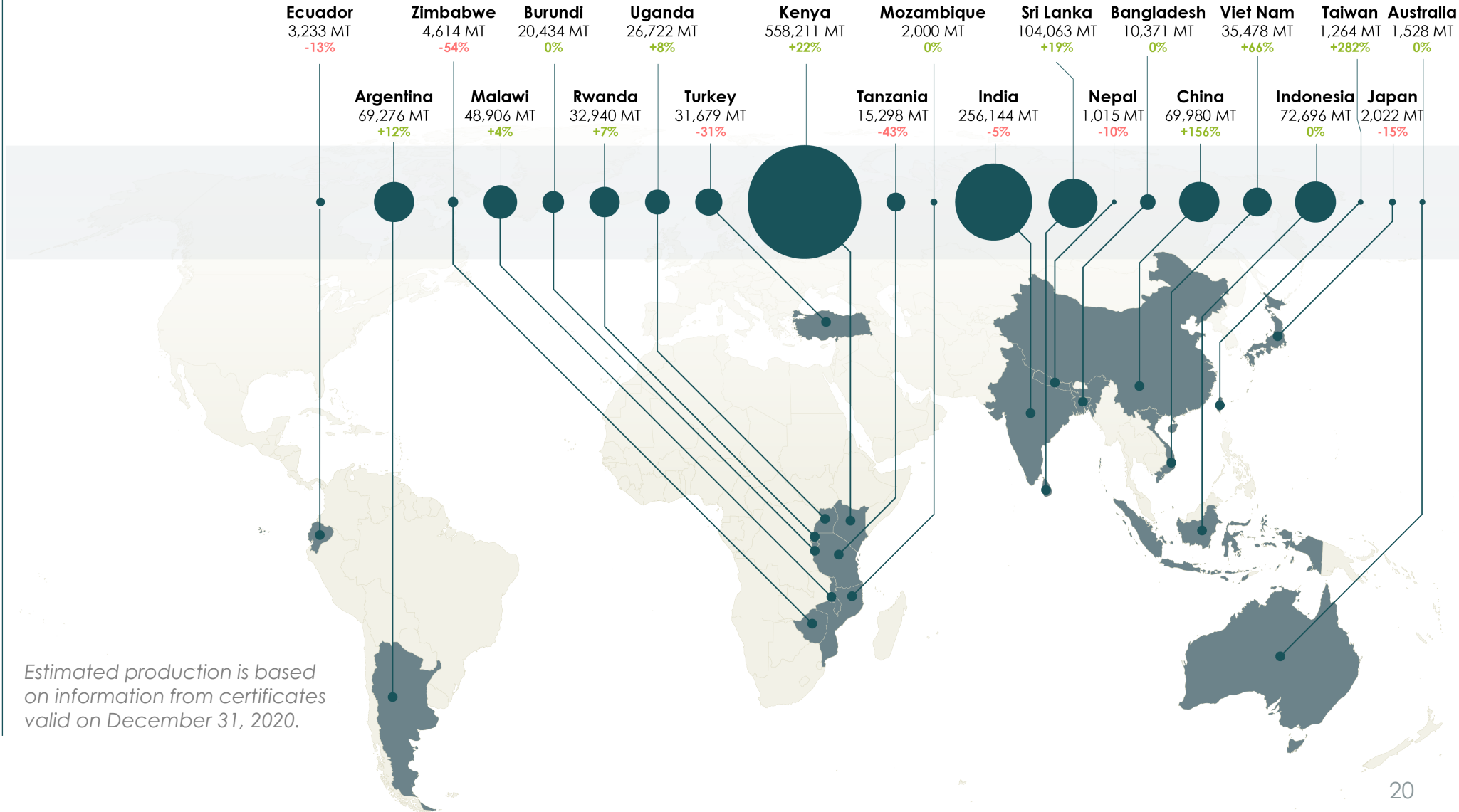


In line with previous years, the estimated certified volume steadily increased in 2020 (+12% vs. 2019).

Tea Certification Data Report 2020
Rainforest Alliance program

Estimated production is based on information from certificates valid on December 31, 2020.

Estimated production per origin



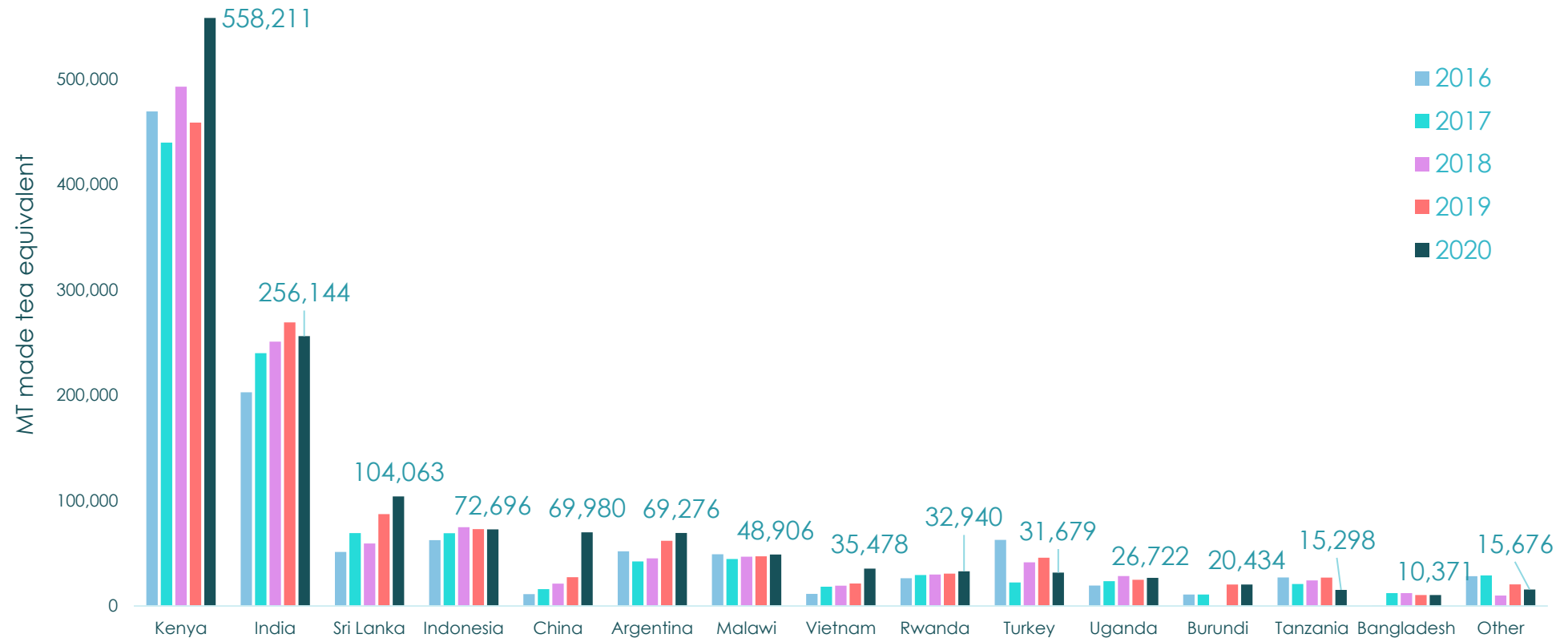
The global increase is shown across all regions; Africa (+14%), Asia (+9%) and Latin America (+10%).

The top 3 producing are Kenya, India, and Sri Lanka.

Tea Certification Data Report 2020
Rainforest Alliance program

Estimated production is based on information from certificates valid on December 31, 2020.

Estimated production per origin



The top 3 producing countries remained the same vs. 2019: Kenya, India, and Sri Lanka.

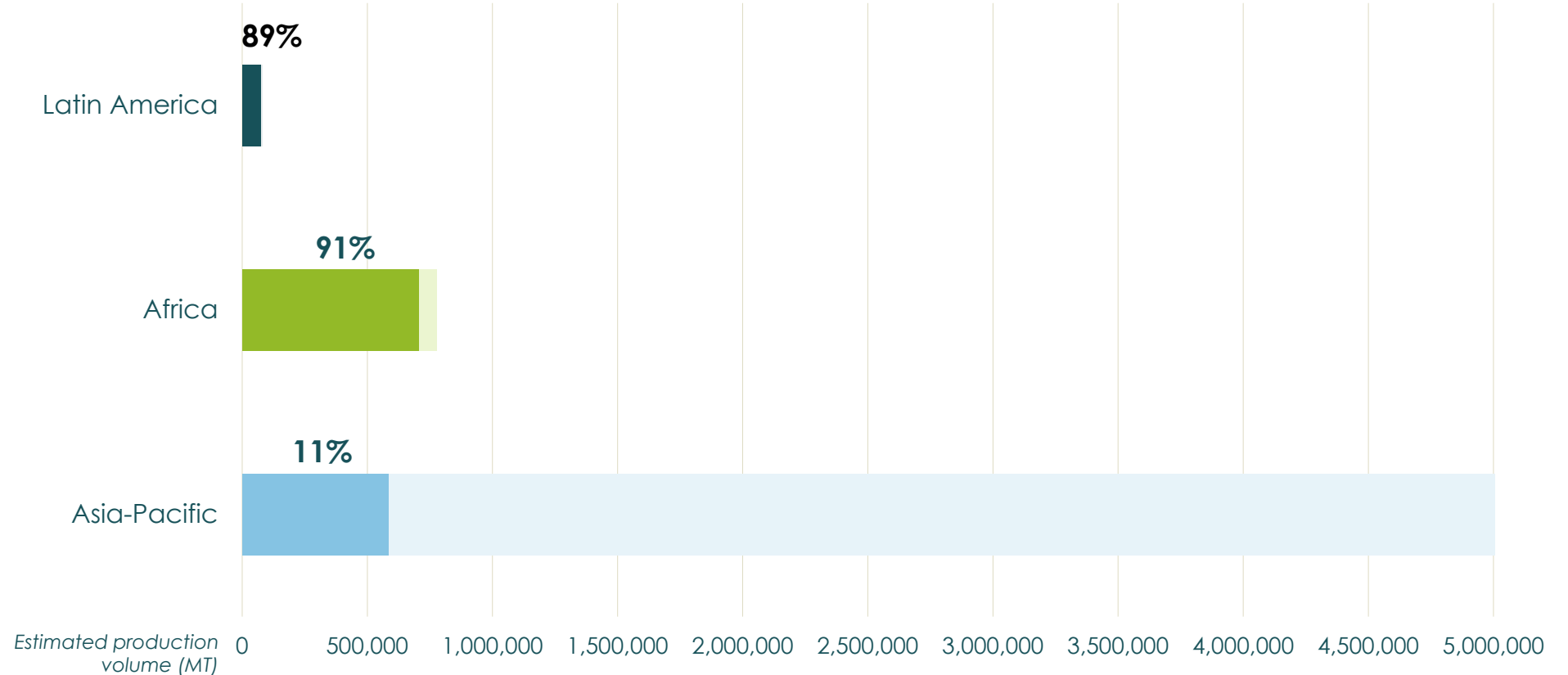
Noticeable increases are seen in China (+156%) and Vietnam (+66%).

In 2020, of all tea produced globally 23% was Rainforest Alliance certified, a growth of 14% compared to 2019.

On regional level, certified tea from Africa had the highest production market share (91%), followed by Latin America (89%) and Asia Pacific (11%)

Tea Certification Data Report 2020
Rainforest Alliance program

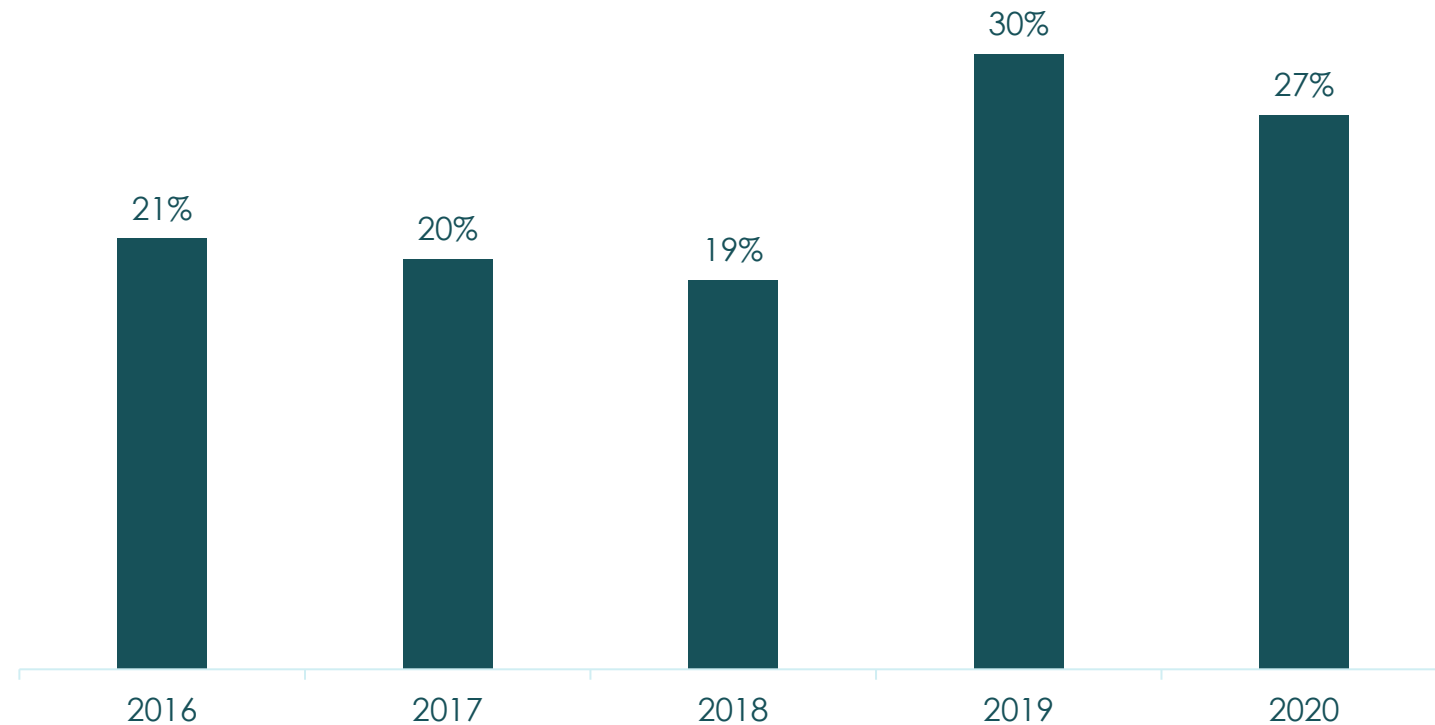
Production market share per region



Rainforest Alliance Certified estimated tea production vs estimated global production (source: International Tea Committee).

Supply and Demand ratio

Supply – Demand ratio



% of estimated Rainforest Alliance Certified production sold as Rainforest Alliance Certified

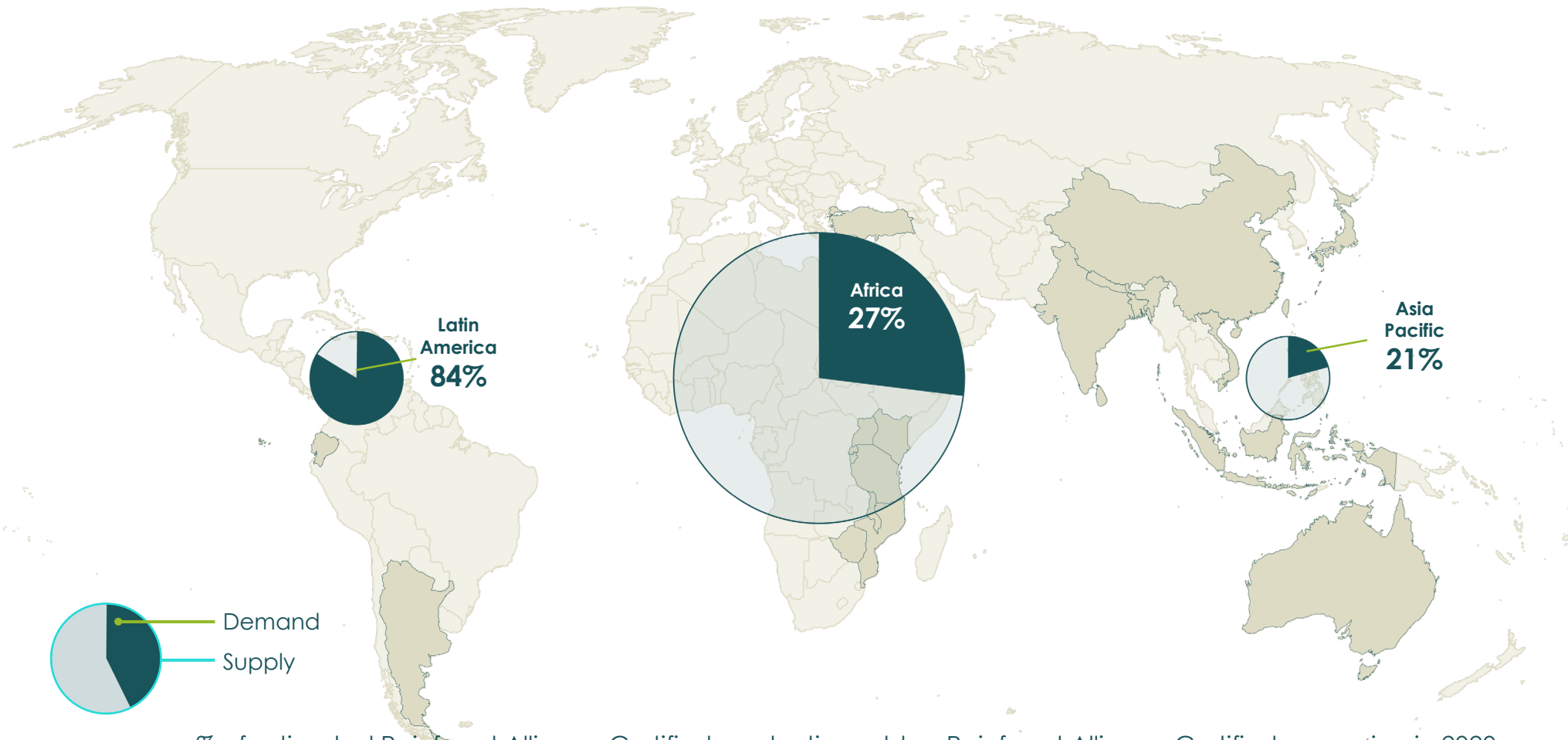
This is based on confirmed producer sales and estimated production on December 31, 2020. It indicates an estimation, not an absolute number.

In 2020, producers sold on average 27% of their estimated certified volume as Rainforest Alliance Certified.

The global supply and demand ratio for the Rainforest Alliance tea program decreased by 9% vs. 2019.

Tea Certification Data Report 2020
Rainforest Alliance program

Supply – Demand per region



Latin America has the highest share of certified sales with 84% of certified production sold as Rainforest Alliance Certified.

Tea Certification Data Report 2020
Rainforest Alliance program

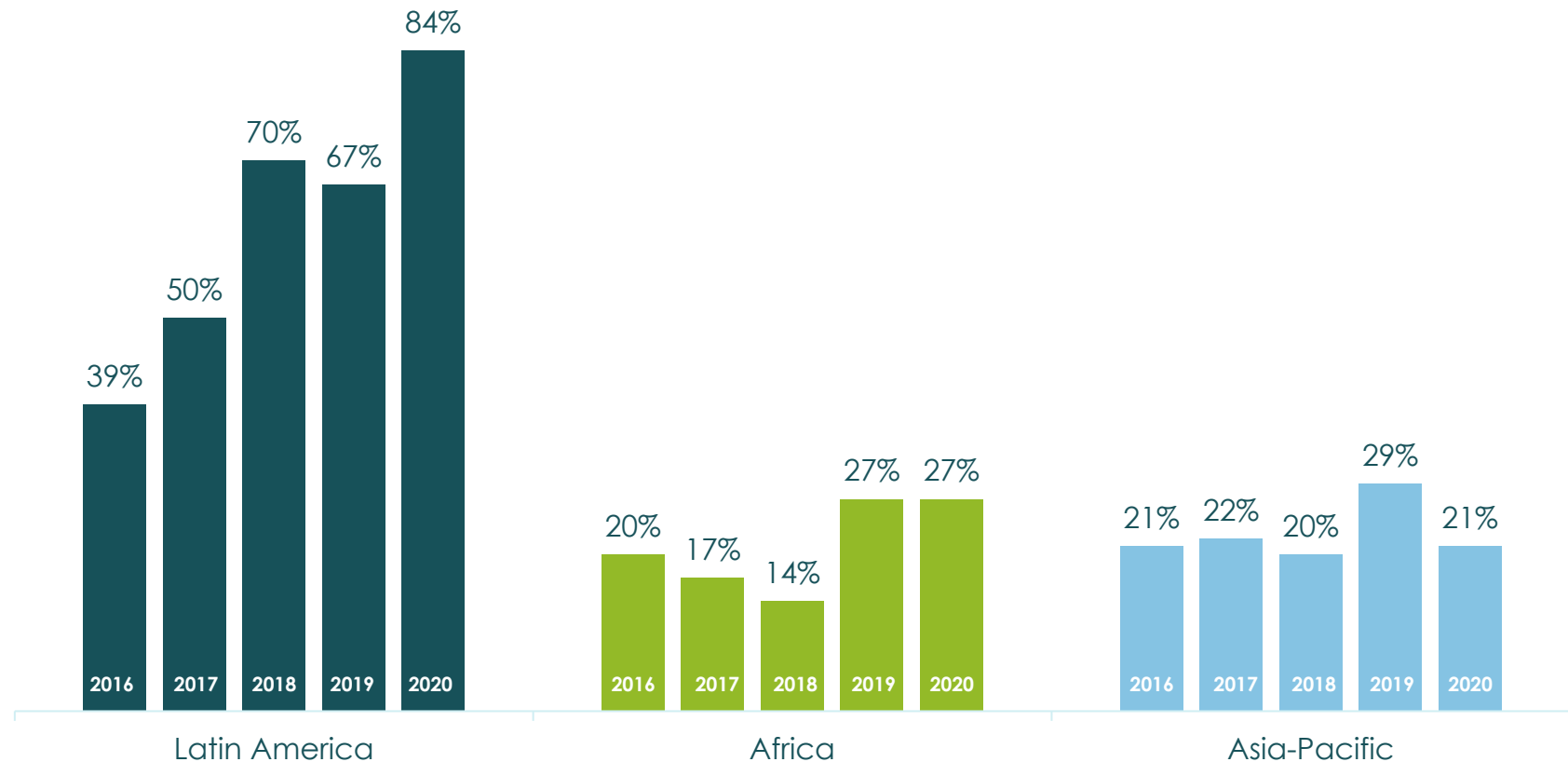
% of estimated Rainforest Alliance Certified production sold as Rainforest Alliance Certified per region in 2020

This is based on confirmed producer sales and estimated production on December 31, 2020. It indicates an estimation, not an absolute number.

Supply – Demand per region

The supply demand ratio increased in Latin America (+25%), stabilized in Africa and dropped in Asia Pacific (-29%).

Tea Certification Data Report 2020
Rainforest Alliance program



% of estimated certified production sold as Rainforest Alliance per region

This is based on confirmed producer sales and estimated production on December 31, 2020. It indicates an estimation, not an absolute number.

Multi-certification

Multi-certification



28%

of the Rainforest Alliance
producer groups and
individual farms were
certified for at least one
other standard

11% UTZ

15% Organic

12% Fairtrade

Double-certification
Rainforest Alliance and
Organic is the
predominant
combination with 15%.

Tea Certification Data Report 2020
Rainforest Alliance program

Multi-certified represents the number of Rainforest Alliance Certified tea producer groups and individual farms that were also certified for one or more of the following schemes: UTZ, Organic, and Fairtrade.

Certification data

Estimated production (MT)

Country	2018	2019	2020
Global	1,178,965	1,226,708	1,367,125
Argentina	45,236	61,894	69,276
Australia	1,402	1,528	1,528
Bangladesh	12,228	10,371	10,371
Burundi	-	20,434	20,434
China	21,186	27,289	69,980
Ecuador	3,735	3,735	3,233
India	250,995	269,266	256,144
Indonesia	74,782	72,962	72,696
Japan	2,371	2,371	2,022
Kenya	492,999	458,853	558,211
Malawi	46,758	47,180	48,906
Mozambique	1,700	2,000	2,000
Nepal	427	1,130	1,015
Rwanda	29,873	30,698	32,940
Sri Lanka	59,317	87,173	104,063
Taiwan	331	331	1,264
Tanzania	24,280	26,916	15,298
Turkey	41,427	45,887	31,679
Uganda	28,368	24,835	26,722
Vietnam	19,296	21,312	35,478
Zimbabwe	16,813	10,039	4,614

Global sales (MT)

Country	2018	2019	2020
Global	228,209	369,344	375,283
Argentina	34,295	44,202	60,982
Burundi	28	91	60
China	7,320	14,708	13,106
India	46,526	54,214	33,607
Indonesia	12,729	39,236	24,365
Kenya	52,400	116,270	118,321
Malawi	10,060	20,092	39,372
Nepal	8	188	45
Rwanda	11,361	15,056	10,699
Sri Lanka	18,045	11,572	21,524
Taiwan	138	125	189
Tanzania	7,025	7,710	10,129
Turkey	6,075	18,488	14,592
Uganda	10,810	4,410	2,715
Vietnam	5,888	14,550	11,143
Zimbabwe	4,125	5,024	11,025
Other*	1,377	3,091	3,408

*Other countries are Australia, Bangladesh, Brazil, Ecuador, Ethiopia, Japan, and Mozambique

Number of farmers

	2018	2019	2020
Global	878,182	936,981	958,528
Africa	811,454	844,065	842,253
Asia / Pacific	66,158	92,216	115,488
Latin America	570	700	787

Number of workers (permanent & seasonal)

	2018	2019	2020
Global	767,378	734,647	734,120
Africa	203,697	182,395	162,452
Asia / Pacific	562,588	550,980	570,481
Latin America	1,093	1,272	1,187

Area (Hectare)

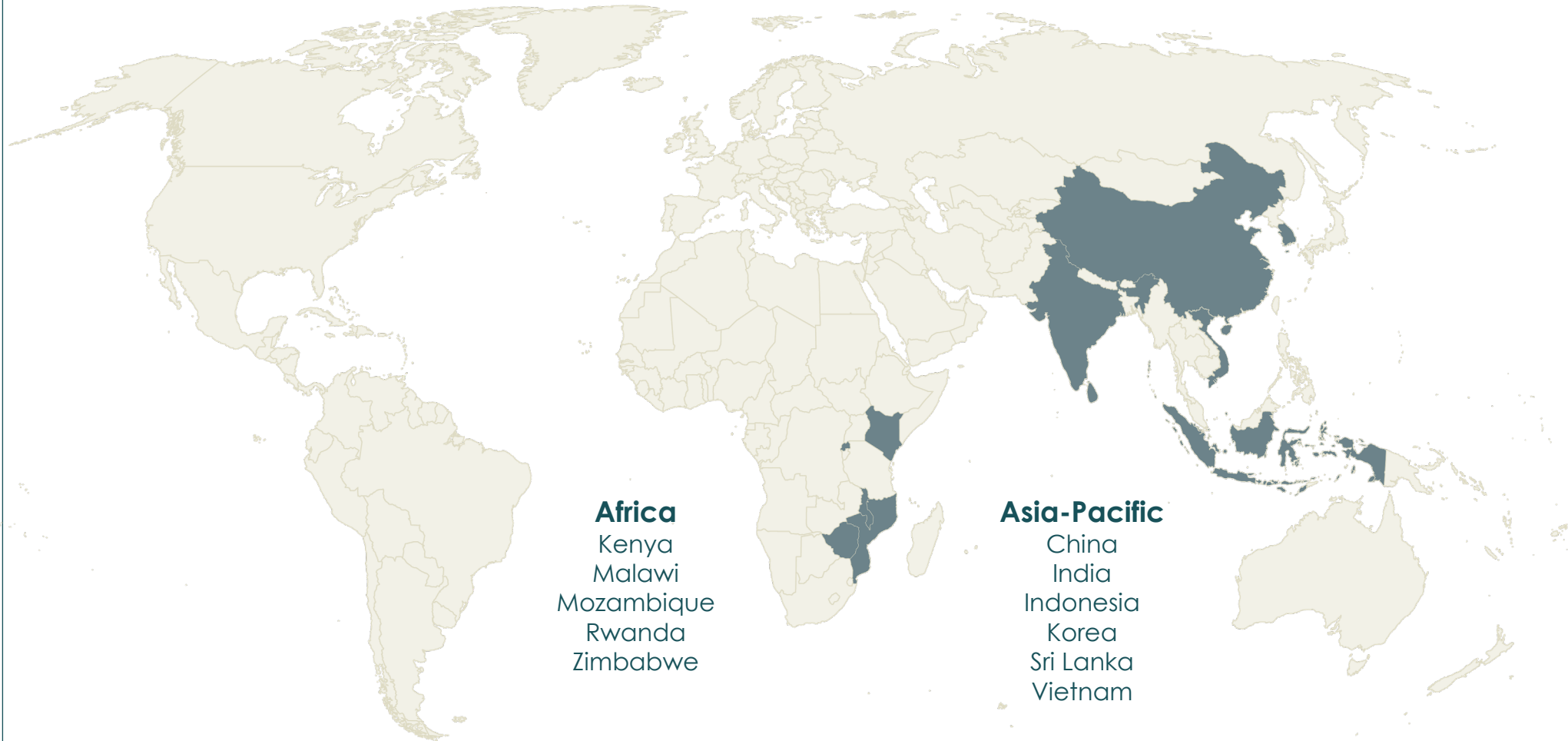
	2018	2019	2020
Global	593,481	613,582	643,184
Africa	302,775	304,525	318,862
Asia / Pacific	274,854	291,818	305,725
Latin America	15,852	17,238	18,597



UTZ Tea program

Program reach

Geographical reach



In 2020, with Latin America and South Africa no longer featuring UTZ certified tea farms, the number of countries with UTZ certified tea producers decreased to 11.

Tea Certification Data Report 2020
UTZ program

Program reach



56,174

Area (hectare)

Relative growth
2019-2020:
-10%



14,795

Number of farmers

Relative growth
2019-2020:
+14%



100,621

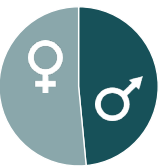
Estimated production (MT)

Relative growth
2019-2020:
-18%



57,548

Number of workers
(seasonal and permanent)



Relative growth
2019-2020:
-30%

Program reach



In 2020, the estimated production area dropped by 10% compared to 2019. Both Asia Pacific and Africa show a decrease of 9%. Significant drops can be seen in India (-24%), Malawi (-43%) and China (-16%).

Area (hectare)



In 2020, the number of farmers increased by 14% vs. 2019. This growth was driven by the Asia Pacific region (+57%), mostly India and Sri Lanka. Kenya continued having the largest number of farmers, followed by India and Zimbabwe (respectively 8k+, 3.7k+ and 1k+ farmers).

Number of farmers



In 2020, the estimated certified volume decreased by 18% compared to last year. This decrease is seen across all regions, with large drops observed in Indonesia (-70%) and Malawi (-50%). The top 3 producing countries are India, Kenya, and China.

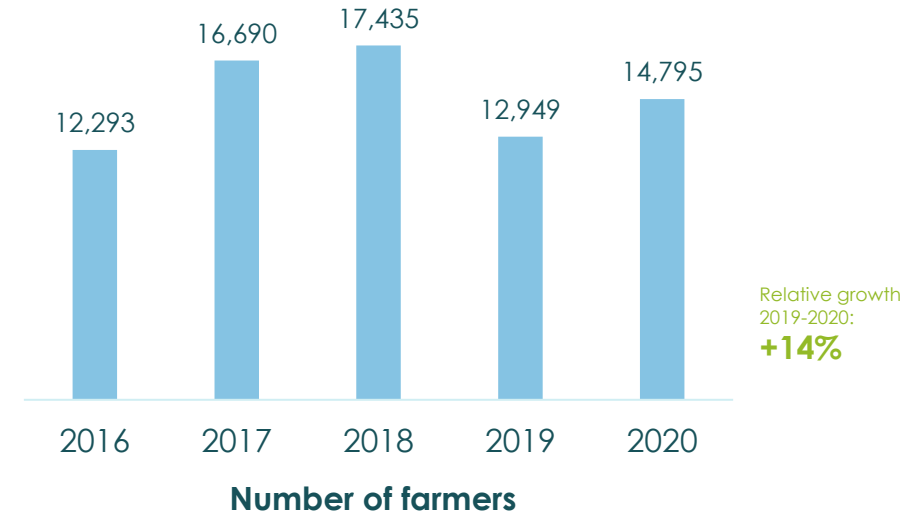
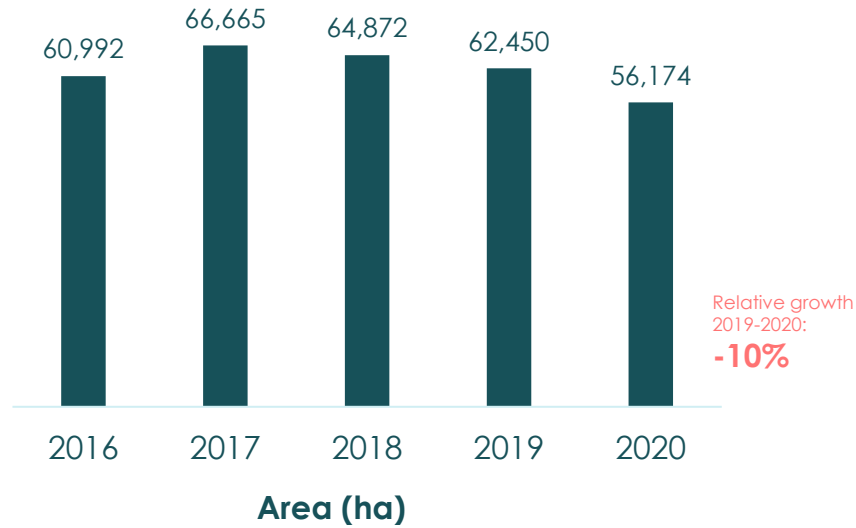
Estimated production (MT)



In 2020, the number of workers experienced a drop of 30% globally with the highest drop in Africa (-33%) followed by Asia and Pacific (-29%). This is in line with the other production indicators going down. Continued mechanization in tea production and COVID-19 restrictions may also have played a role.

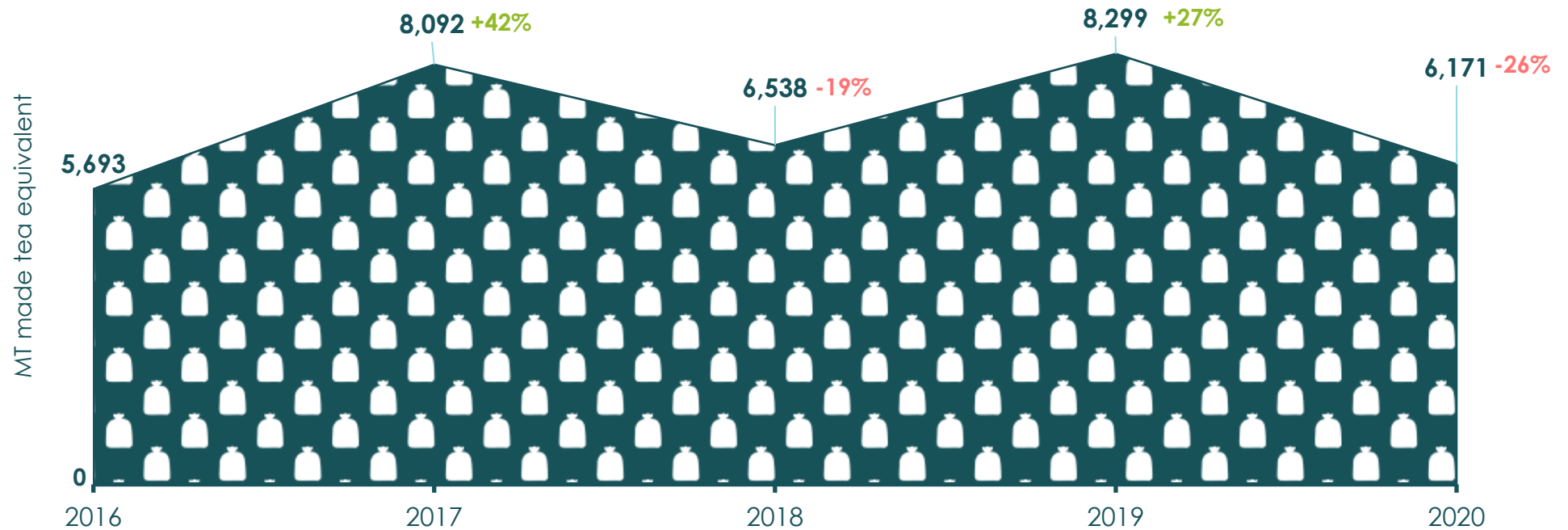
Number of workers
(seasonal and permanent)

Program reach



Global sales

Global tea sales



The global Rainforest Alliance tea sales saw a drop of 26%.

Most tea sales came from India, Malawi, and China.

Tea Certification Data Report 2020
UTZ program

'Global sales' are all the confirmed volumes sold from a certified producer to the first buyer. Years are calendar years.

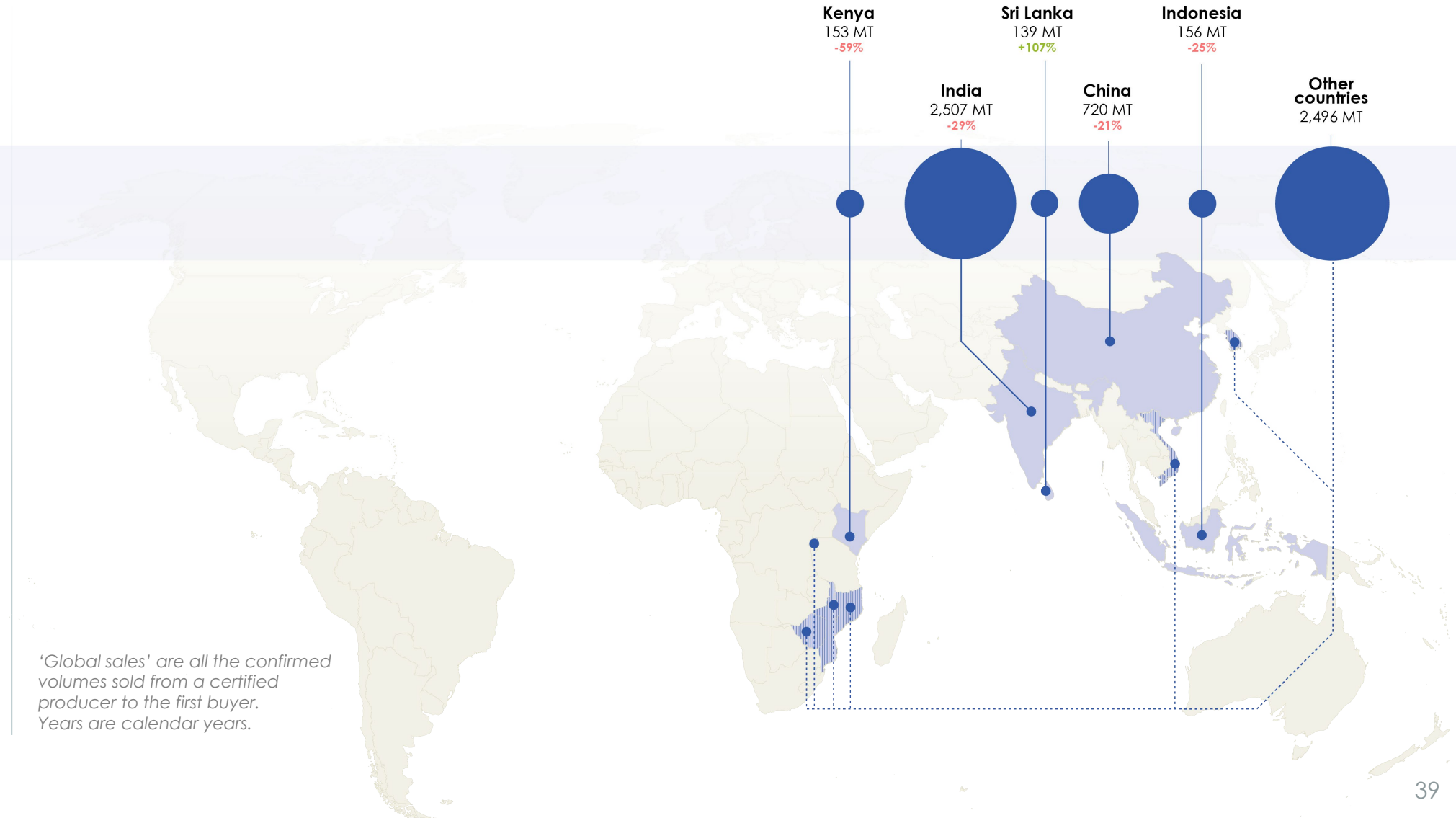
Global sales per origin

The global sales decrease is reflected across all regions with significant drops seen in India (-29%) and Malawi (-35%). The two countries nevertheless remained the top 2 producer sales, similar to 2019.

“Other countries” – which includes Malawi – have fewer than 3 certificate holders per country and exact figures are therefore not specified. Their total sales volume however accounts for 40% of the total sales.

Tea Certification Data Report 2020
UTZ program

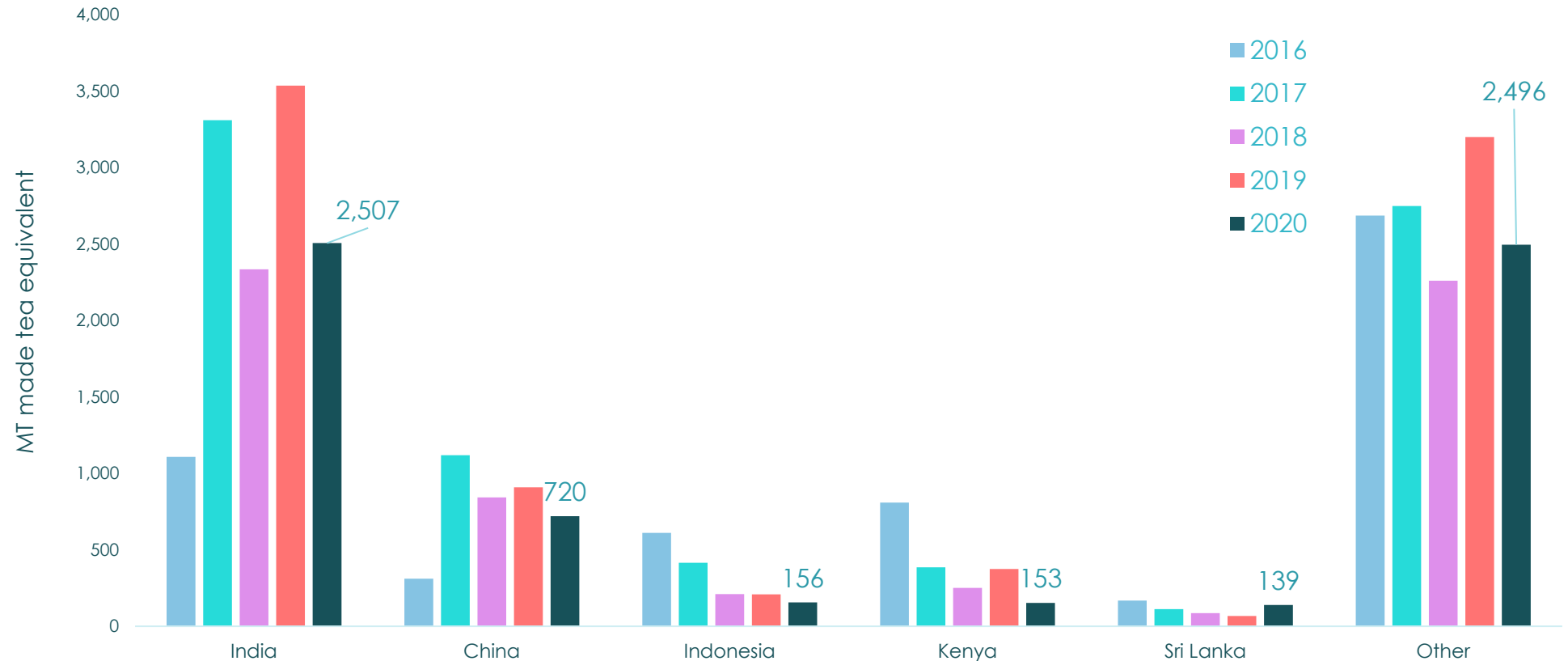
‘Global sales’ are all the confirmed volumes sold from a certified producer to the first buyer. Years are calendar years.



Global sales per origin

The large sales drops could be explained by a mix of reasons. One of the main ones to call out is COVID-19, which affected auction sales, buyer inventories and behaviors, and export sales (most certified tea is exported, not consumed domestically). Another reason is the ongoing switch from UTZ to Rainforest Alliance certification.

Tea Certification Data Report 2020
UTZ program



'Global sales' are all the confirmed volumes sold from a certified producer to the first buyer. Years are calendar years. Other countries are: Malawi, Mozambique, Rwanda, South Korea, Vietnam and Zimbabwe.

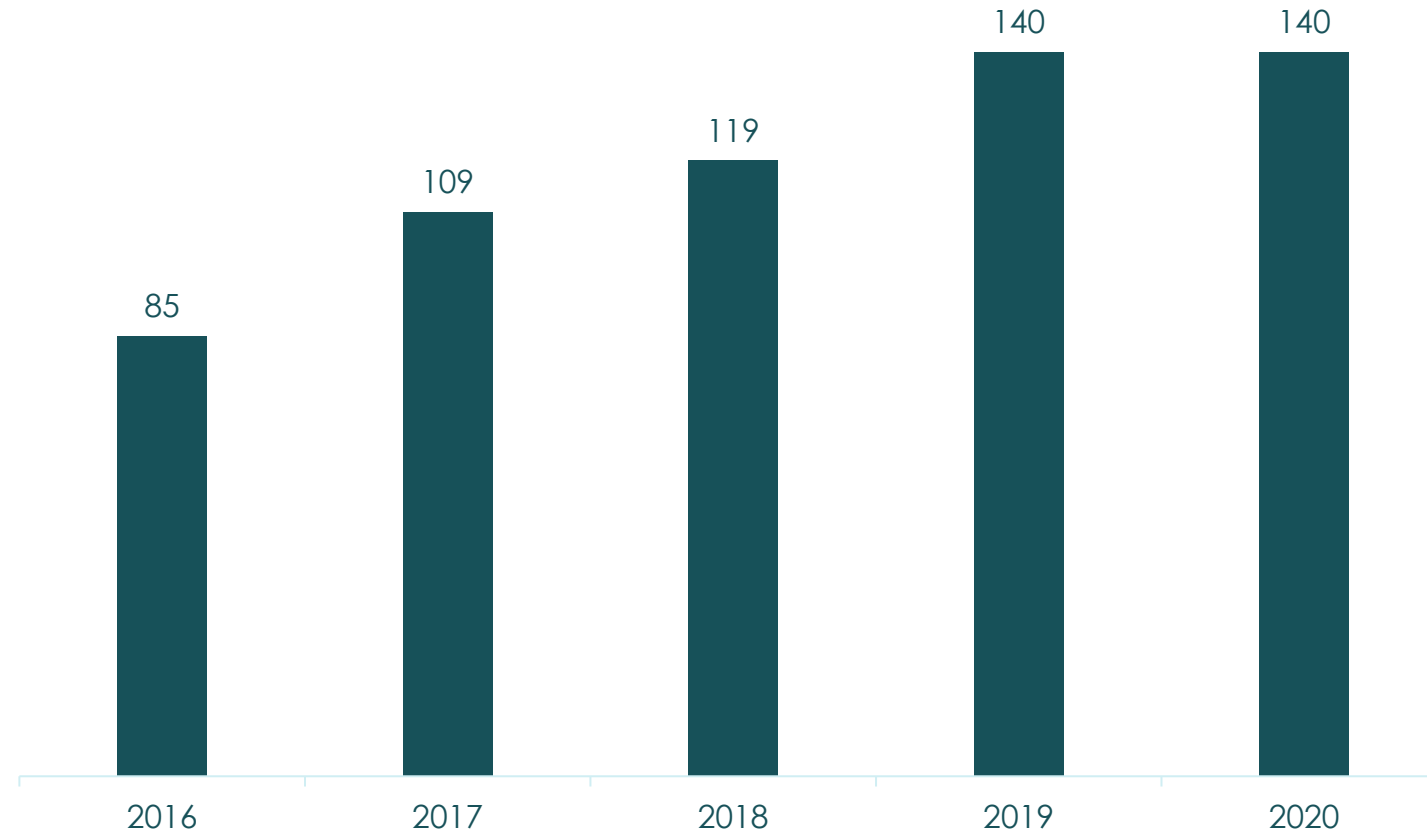
In 2020 the number of supply chain actors remained stable at 140.

Most supply chain actors are based in Europe (81), with two new countries welcomed: Finland and Portugal.

Germany showed the highest number of supply chain actors (33), followed by India (14), and the Netherlands (13).

An important increase is seen in South Africa (from 5 to 9 supply chain actors).

Registered supply chain actors



'Supply Chain Actors' include traders, processors, blenders, packers, and retailers.

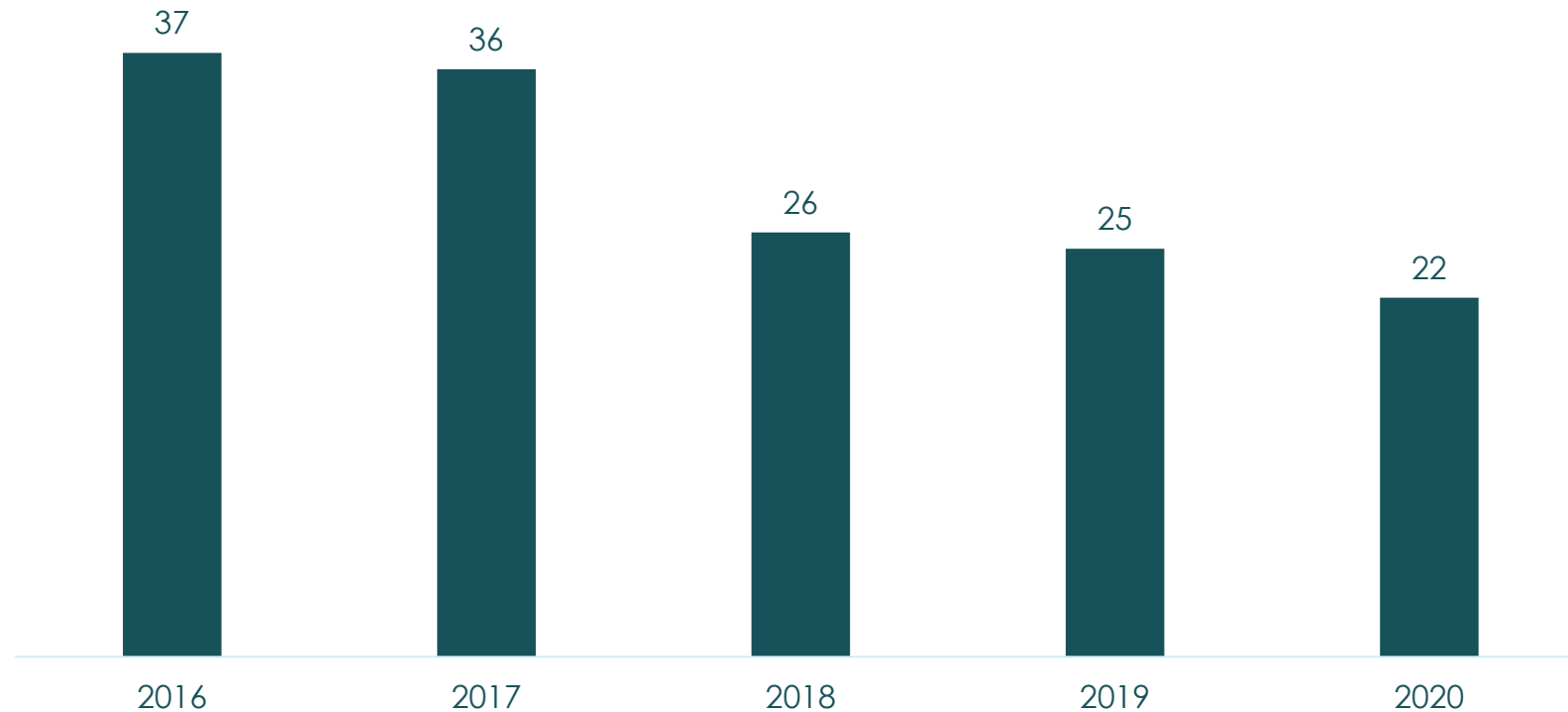
Premium

In 2020, the UTZ global average tea premium decreased with 12% to 22 EUR/MT.

The UTZ premium is an additional cash amount paid to producers, above the market price for a similar conventional (non-certified) product. It is mandatory and agreed upon between the certified group or producer and the first buyer.

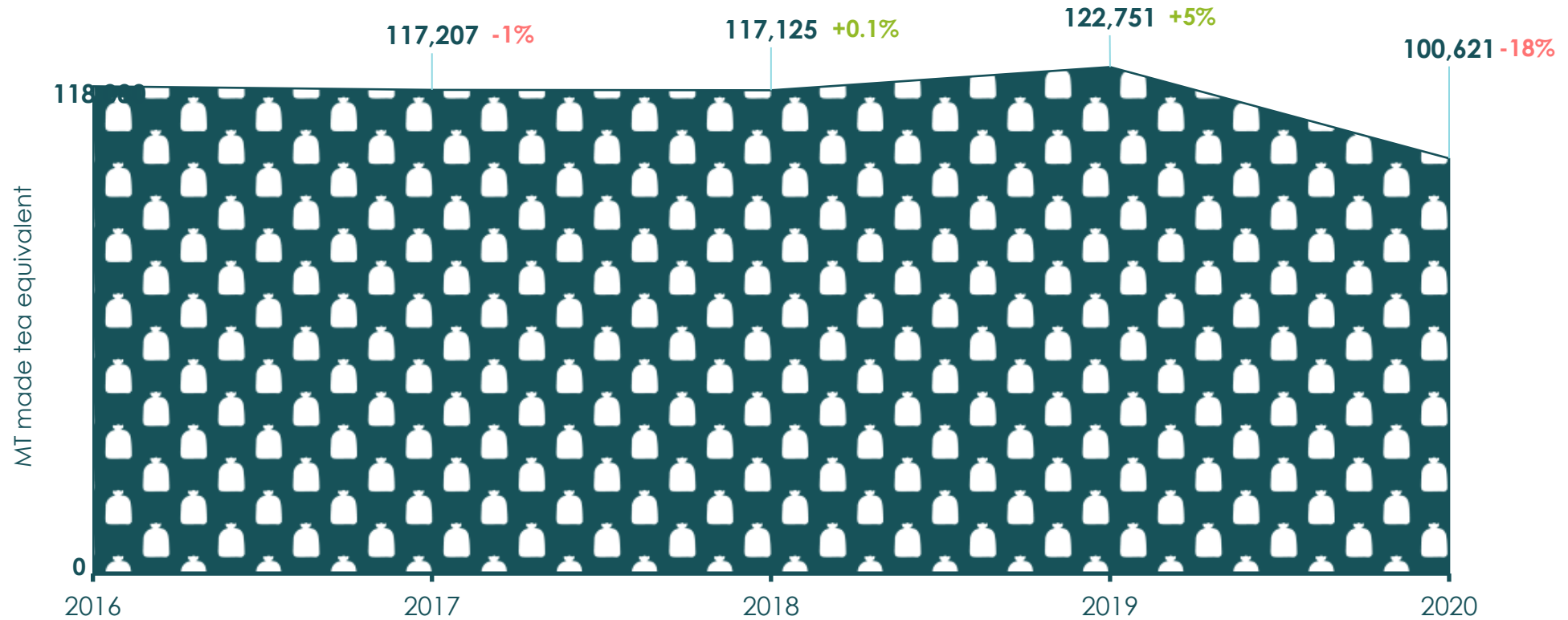
Tea Certification Data Report 2020
UTZ program

Average UTZ premium in EUR/MT



Estimated Production

Global estimated tea production



In 2020, the estimated certified volume decreased by 18% compared to last year.

Tea Certification Data Report 2020
UTZ program

Estimated production is based on information from certificates valid on December 31, 2020 and those under review where a positive certification decision is expected.

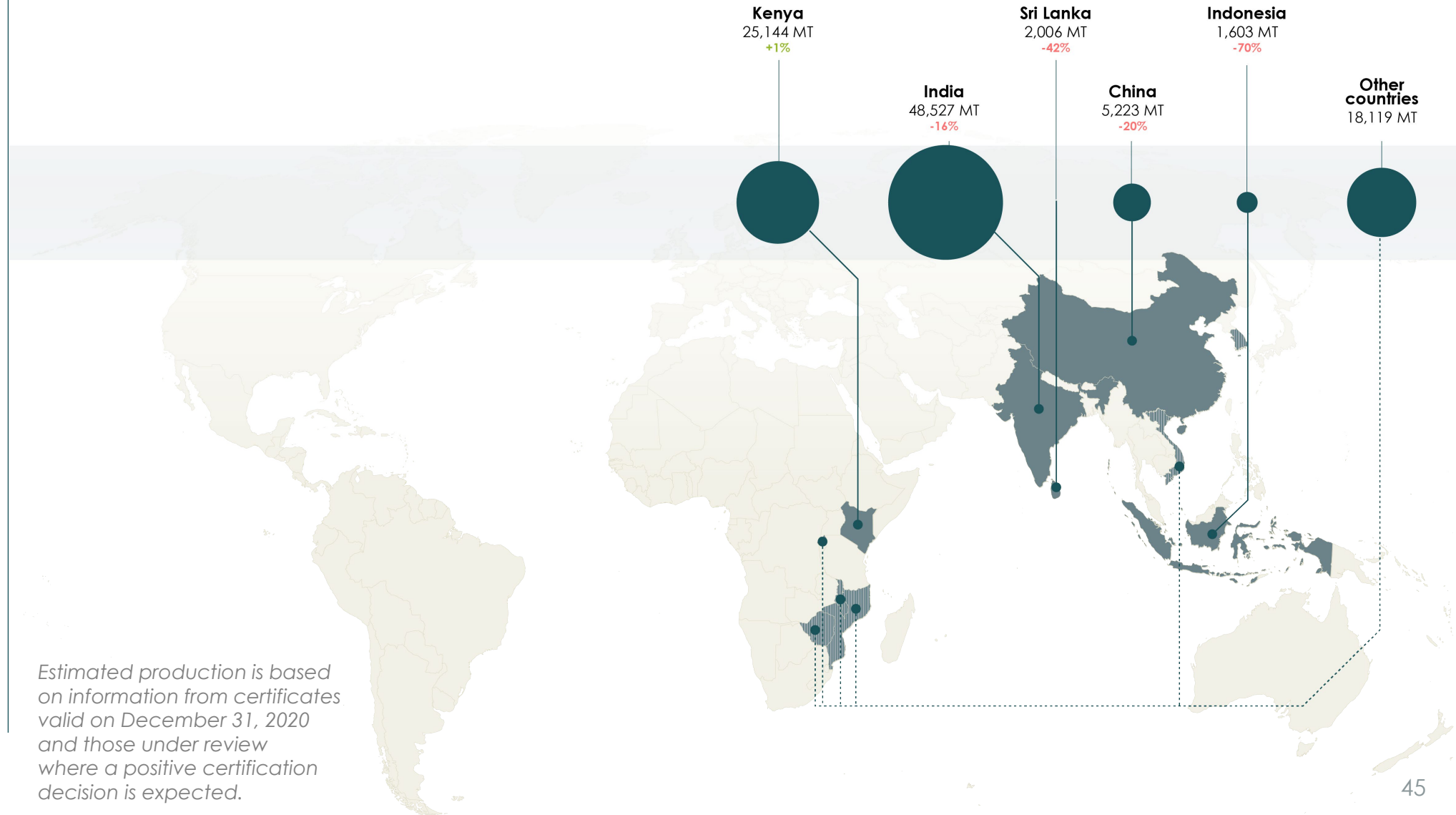
Estimated production per origin

The global decrease in estimated certified volume is seen across all regions; Africa (+10%), Asia (-22%) and no more production of UTZ certified tea Latin America.

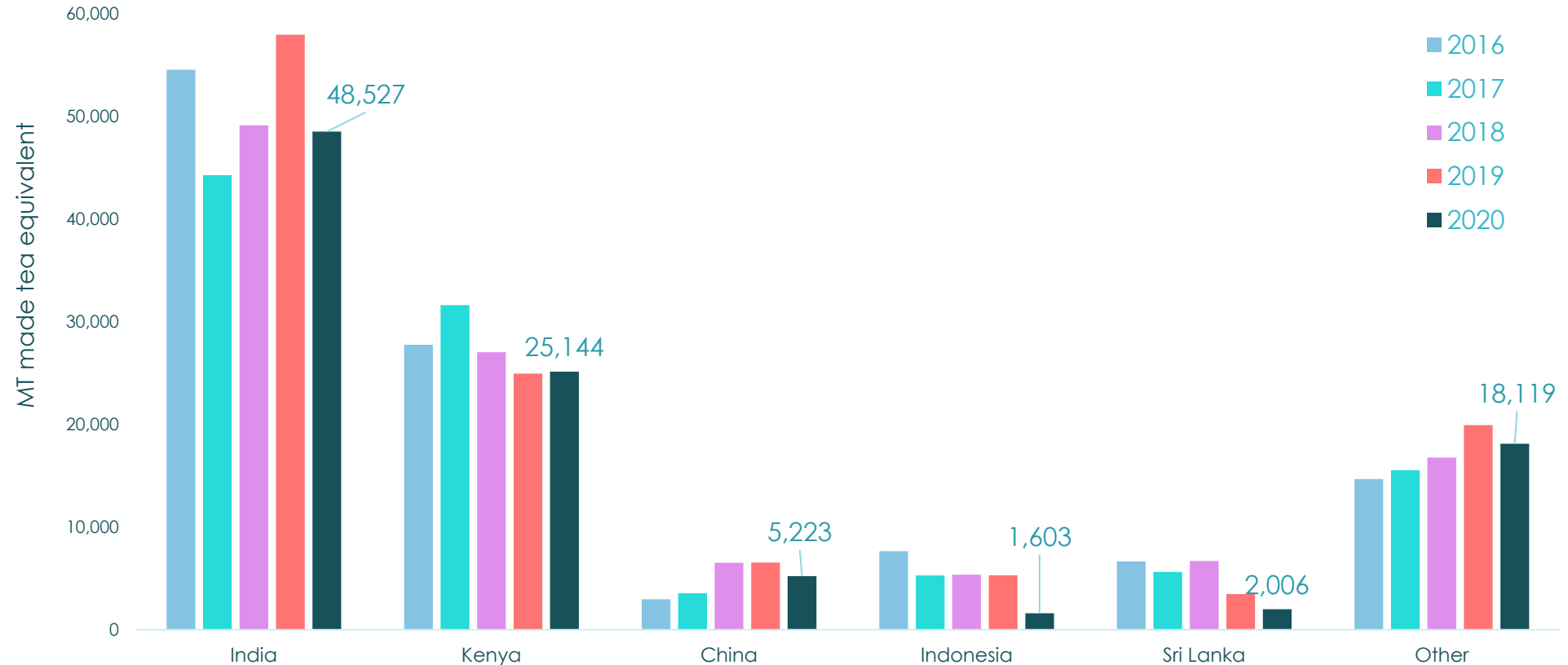
The top 3 producing countries are India, Kenya, and China.

Tea Certification Data Report 2020
UTZ program

Estimated production is based on information from certificates valid on December 31, 2020 and those under review where a positive certification decision is expected.



Estimated production per origin



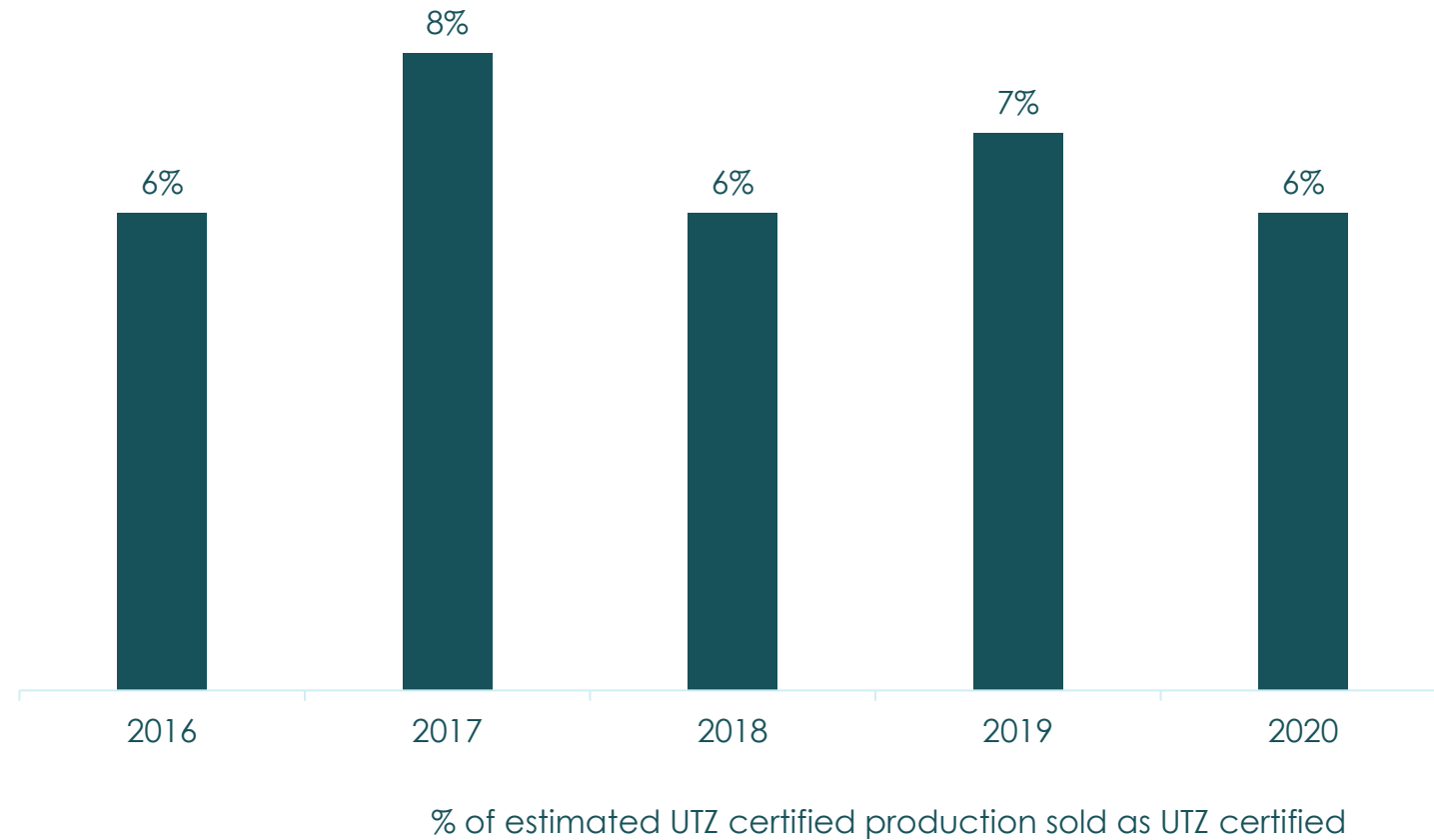
The top 3 producing countries are India, Kenya, and China.

Indonesia showed a large drop (-70%) as well as Malawi (-50%).

Estimated production is based on information from certificates valid on December 31, 2020 and those under review where a positive certification decision is expected.
Other countries are: Malawi, Mozambique, Rwanda, South Korea, Vietnam and Zimbabwe.

Supply and Demand ratio

Supply – Demand ratio

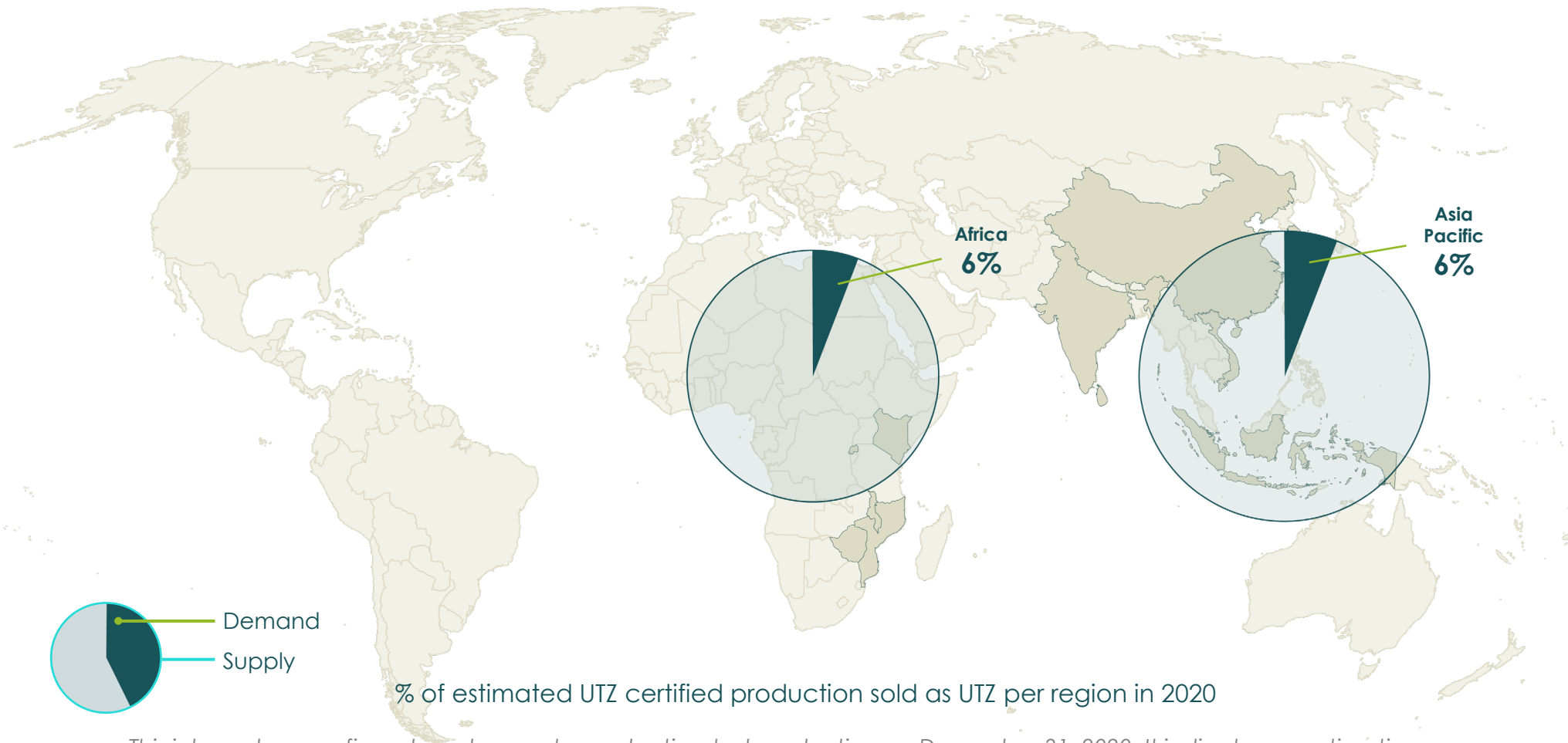


In 2020, producers sold on average 6% of their estimated certified volume as UTZ certified.

Tea Certification Data Report 2020
UTZ program

This is based on confirmed producer sales and estimated production on December 31, 2020. It indicates an estimation, not an absolute number.

Supply – Demand per region

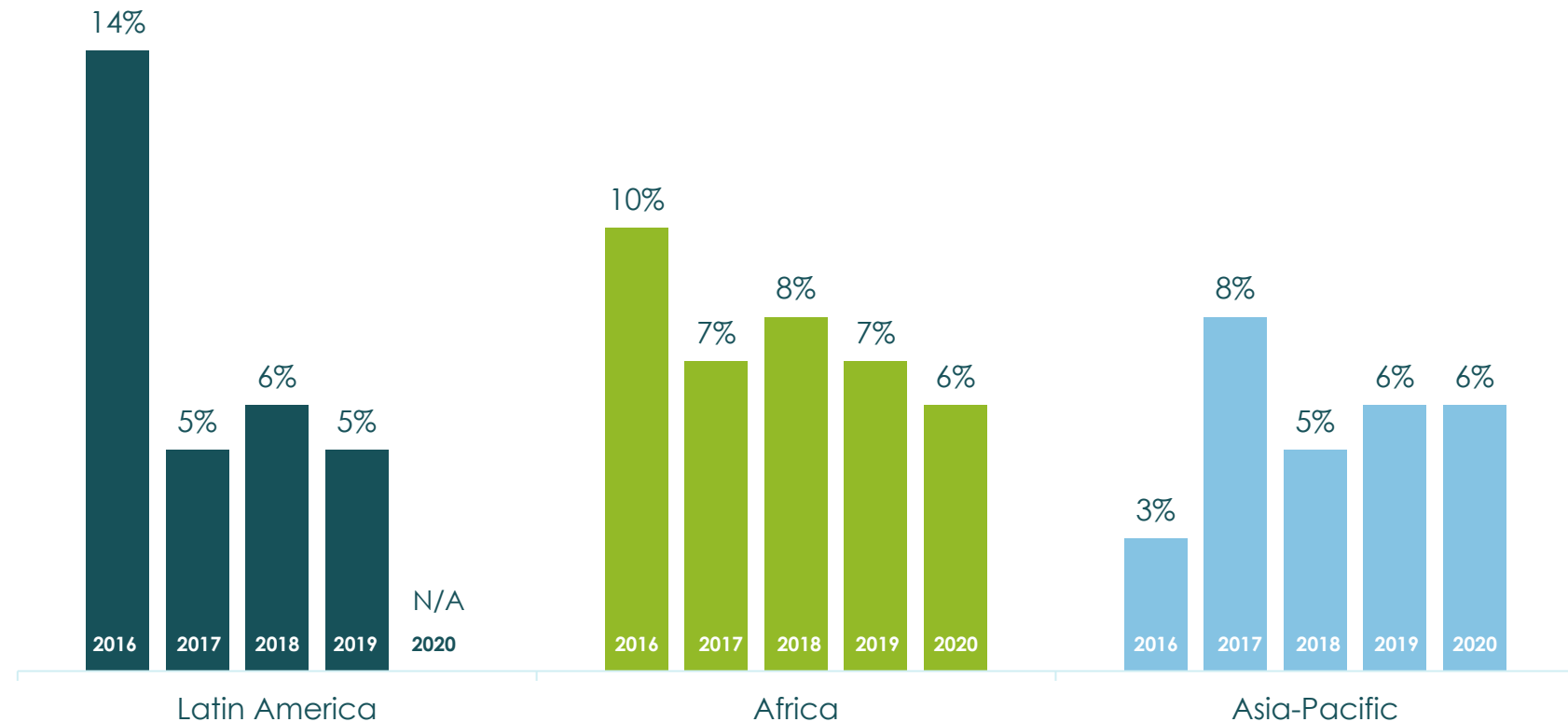


Supply – Demand per region

The supply and demand ratio remained fairly stable in Africa and Asia Pacific.

Latin America produced no longer UTZ certified tea in 2020.

Tea Certification Data Report 2020
UTZ program



% of estimated UTZ certified production sold as UTZ

This is based on confirmed producer sales and estimated production on December 31, 2020. It indicates an estimation, not an absolute number.

Multi-certification

Multi-certification



90%

of the UTZ producer groups and individual farms were certified for at least one other standard

72% Rainforest Alliance

23% Fairtrade

41% Organic

Double-certification UTZ and Rainforest Alliance remains the predominant combination with 72%.

Certification data

Estimated production (MT)

Country	2018	2019	2020
Global	117,125	122,751	100,621
China	6,521	6,549	5,223
India	49,138	57,971	48,527
Indonesia	5,368	5,305	1,603
Kenya	27,042	24,953	25,144
Sri Lanka	6,699	3,474	2,006
Other*	21,272	23,405	18,119

Global sales (MT)

Country	2018	2019	2020
Global	6,538	8,299	6,171
China	843	909	720
India	2,335	3,537	2,507
Indonesia	210	209	156
Kenya	251	375	153
Sri Lanka	86	67	139
Other*	2,813	3,201	2,496

Number of farmers

Country	2018	2019	2020
Global	17,435	12,949	14,795
China	411	423	416
India	2,477	2,445	3,764
Indonesia	3	3	95
Kenya	12,872	8,215	8,191
Sri Lanka	284	338	811
Other*	1,379	1,525	1,518

Number of workers (permanent & seasonal)

Country	2018	2019	2020
Global	88,311	82,249	57,548
China	2,399	1,586	1,096
India	55,751	51,640	36,860
Indonesia	1,900	1,839	656
Kenya	5,226	3,995	3,297
Sri Lanka	6,369	2,619	2,520
Other*	16,633	20,524	13,119

Area (Hectare)

Country	2018	2019	2020
Global	64,872	62,450	62,450
China	2,967	2,690	2,249
India	31,205	32,165	24,432
Indonesia	1,931	1,972	449
Kenya	12,980	9,696	10,446
Sri Lanka	5,177	2,622	8,801
Other*	10,590	13,305	9,797

*Other countries are Malawi, Mozambique, Rwanda, South Korea, Vietnam and Zimbabwe.



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