



Coffee Certification Data Report 2020

Rainforest Alliance and UTZ programs

Introduction

The main goal of this report is to present the scope and scale of the Rainforest Alliance and UTZ coffee 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 coffee;
- **Program reach:** estimated Rainforest Alliance Certified and UTZ certified coffee 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 are aware that there may be some shortcomings.

Summary

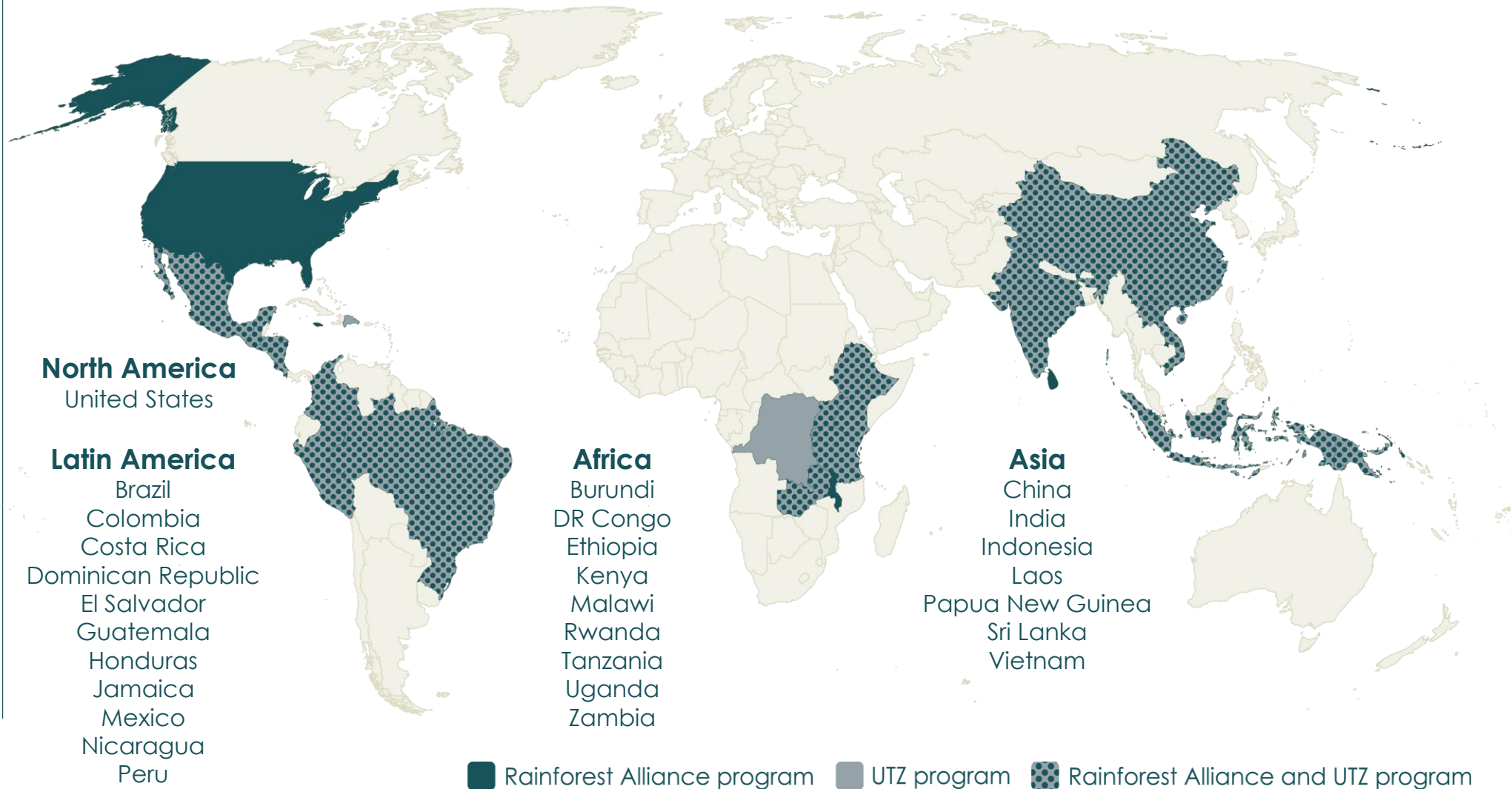
In 2020, both the Rainforest Alliance and the UTZ certification programs continued with the growth trend we saw in the previous year, with respect to most of the relevant indicators. Estimated certified production volume, the number of farmers, certified area (ha), and global producer sales all reported increases in both certification programs.

The Rainforest Alliance and UTZ program demonstrate a similar growth when it comes to certified estimated production volume; 14% in the UTZ and 15% in the Rainforest Alliance certification program.

As for the sales of certified products, the UTZ certification program reports a growth of 20%, compared to 2% in the Rainforest Alliance certification program, resulting in a supply and demand ratio of 57% for UTZ and 52% for the Rainforest Alliance program.

Putting these numbers in a more historical context we can conclude that the UTZ certification program has increased 94% in sales since 2017, whereas the Rainforest Alliance program has increased 44% since 2017.

Geographical program reach



The Rainforest Alliance and UTZ coffee programs reach farmers and workers in 28 countries worldwide.

Coffee Certification Data Report 2020
Rainforest Alliance and UTZ programs

Program reach: Rainforest Alliance and UTZ



1+ Million

Area (hectare)

Combined estimated production area



400+ K

Number of farmers

Combined number of farmers

Coffee Certification Data Report 2020

 [Rainforest Alliance program](#)

 [UTZ program](#)



Rainforest Alliance Coffee program



Program reach

Geographical program reach

North America

United States

Latin America

Brazil

Colombia

Costa Rica

El Salvador

Guatemala

Honduras

Jamaica

Mexico

Nicaragua

Peru

Africa

Burundi

Ethiopia

Kenya

Malawi

Rwanda

Tanzania

Uganda

Zambia

Asia

China

India

Indonesia

Laos

Papua New Guinea

Sri Lanka

Vietnam

With Sri Lanka re-entering the program in 2020, the number of countries with Rainforest Alliance Certified coffee producers increased to 26.

Coffee Certification Data Report 2019
Rainforest Alliance program

Program reach



519,828

Area (hectare)

Relative growth
2019-2020:
+10%



228,430

Number of farmers

Relative growth
2019-2020:
+18%



770,295

Estimated production (MT)

Relative growth
2019-2020:
+15%



334,449

Number of workers
(seasonal and permanent)



■ Male ■ Female

Relative growth
2019-2020:
+14%

Program reach



In 2020, the estimated certified production area increased by 10% compared to 2019. Growth is shown in all regions but particularly driven by an increase in Africa (+18%).

Area (hectare)



In 2020, the number of farmers increased by 18% vs. 2019. The positive trend is shown across all regions; Africa (+17%), Latin America (+15%), and Asia Pacific (+34). Numbers have more than tripled in Tanzania and Uganda.

Number of farmers



In 2020, the estimated certified volume increased by 15% compared to 2019, with most increases (in MT) coming from Latin America. Africa saw a 24% growth, while estimated volume in Asia Pacific decreased by 4%. The top 3 producing countries are: Brazil, Colombia and Ethiopia.

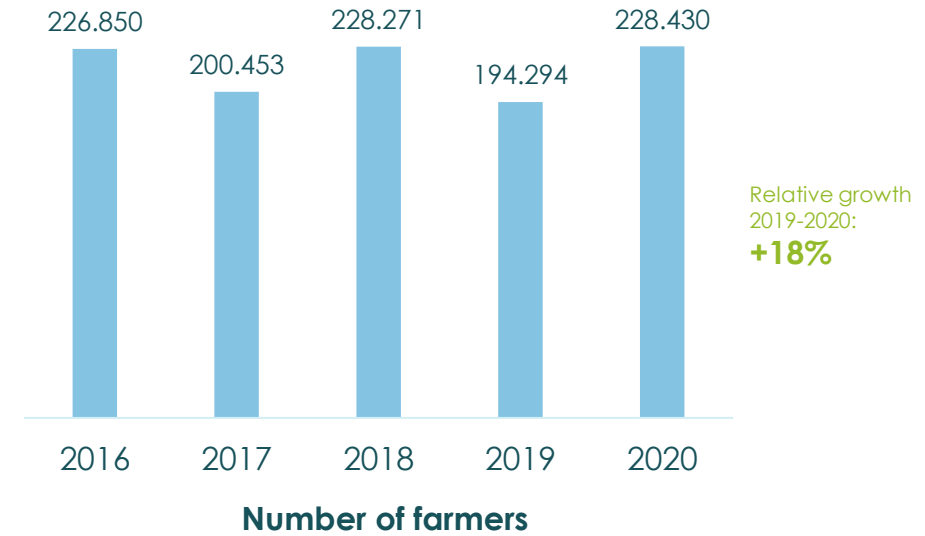
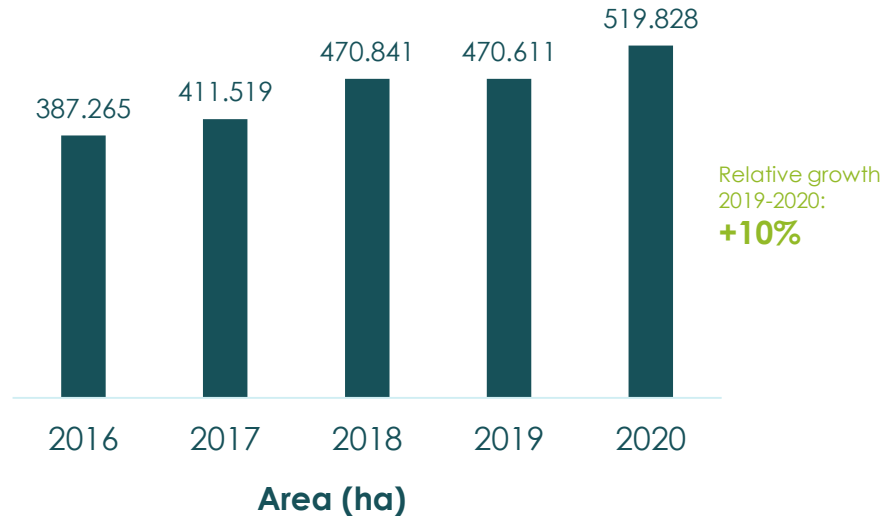
Estimated production (MT)



In 2020, despite COVID-19, the number of workers increased by 14% vs. 2019, with strong growth in Latin America (+23%), and to a lesser extent in Africa (+12%), and Asia Pacific (+13%). This can be explained by more certificate holders and more production volume which increased the demand for labor.

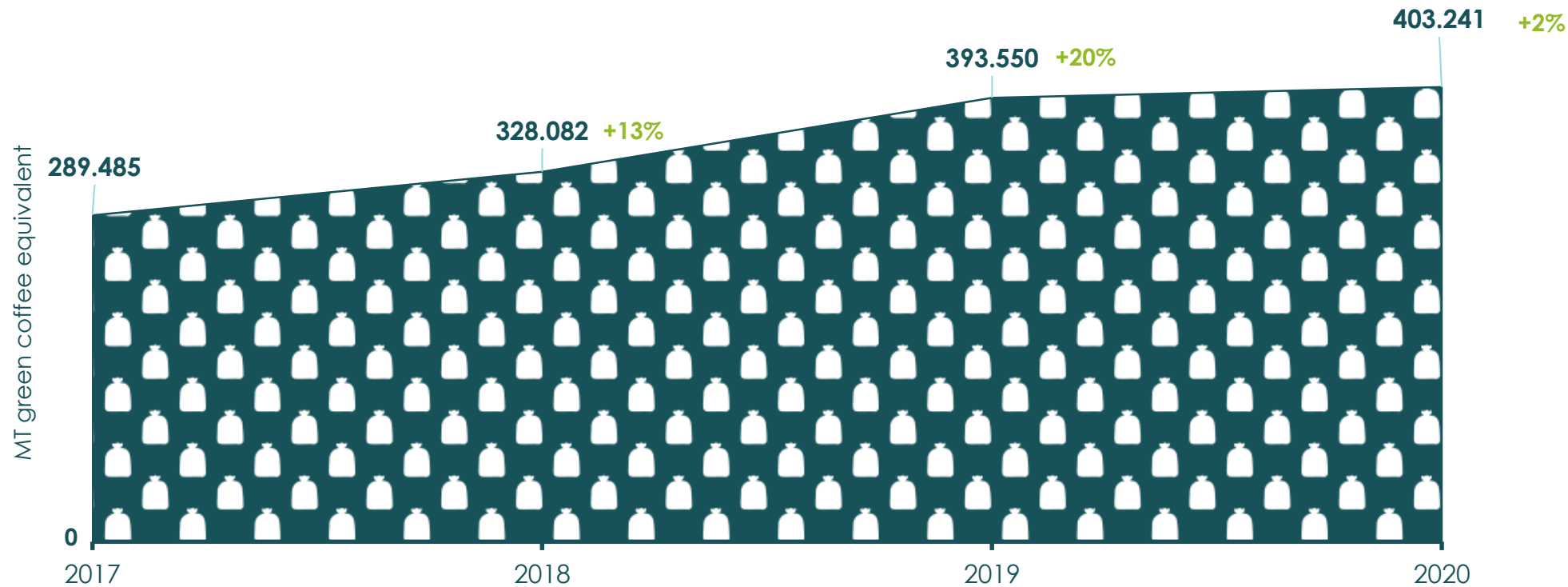
Number of workers
(seasonal and permanent)

Program reach



Global sales

Global coffee sales



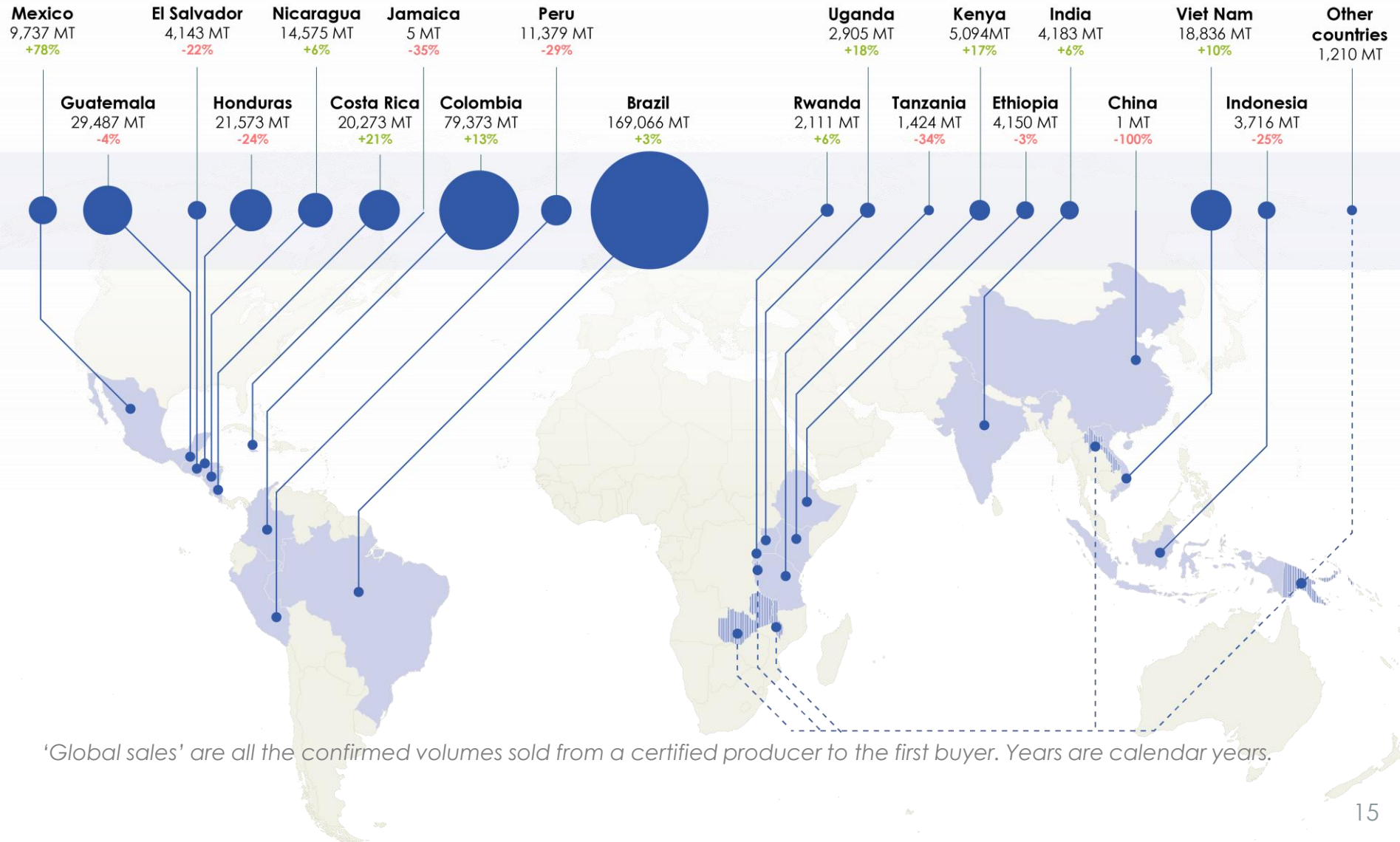
The global Rainforest Alliance coffee sales remained stable with a slight increase of 2%.

Most coffee sales came from Brazil, Colombia, and Guatemala.

Coffee 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.

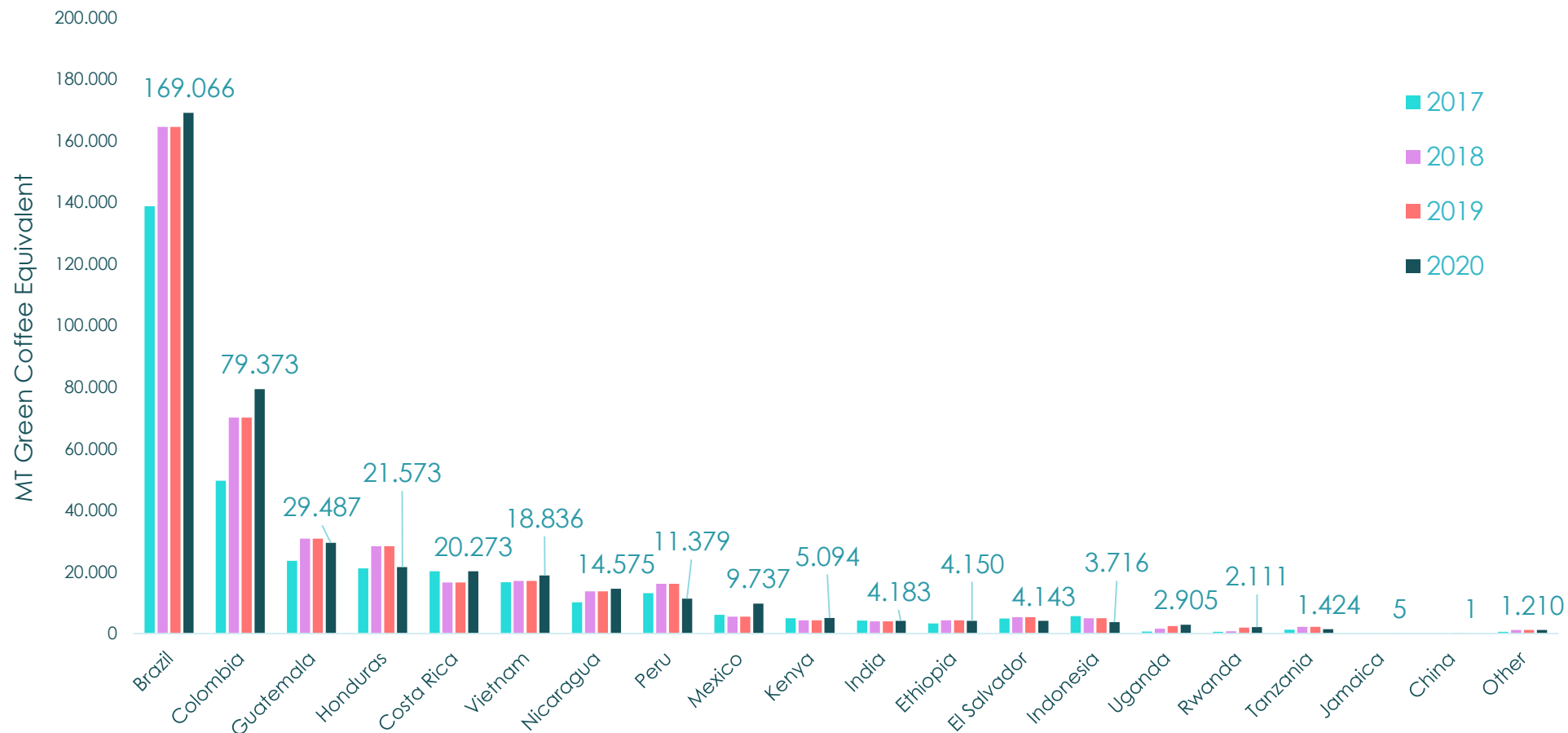
Global sales per origin



The global sales increase of 2% is reflected across all regions; Africa (+3 %), Asia Pacific (+2%), and Latin America (+2%).

There were mixed sales trends within the regions, with sales decrease from certain countries and more coffee sold from producers in others.

Global sales per origin

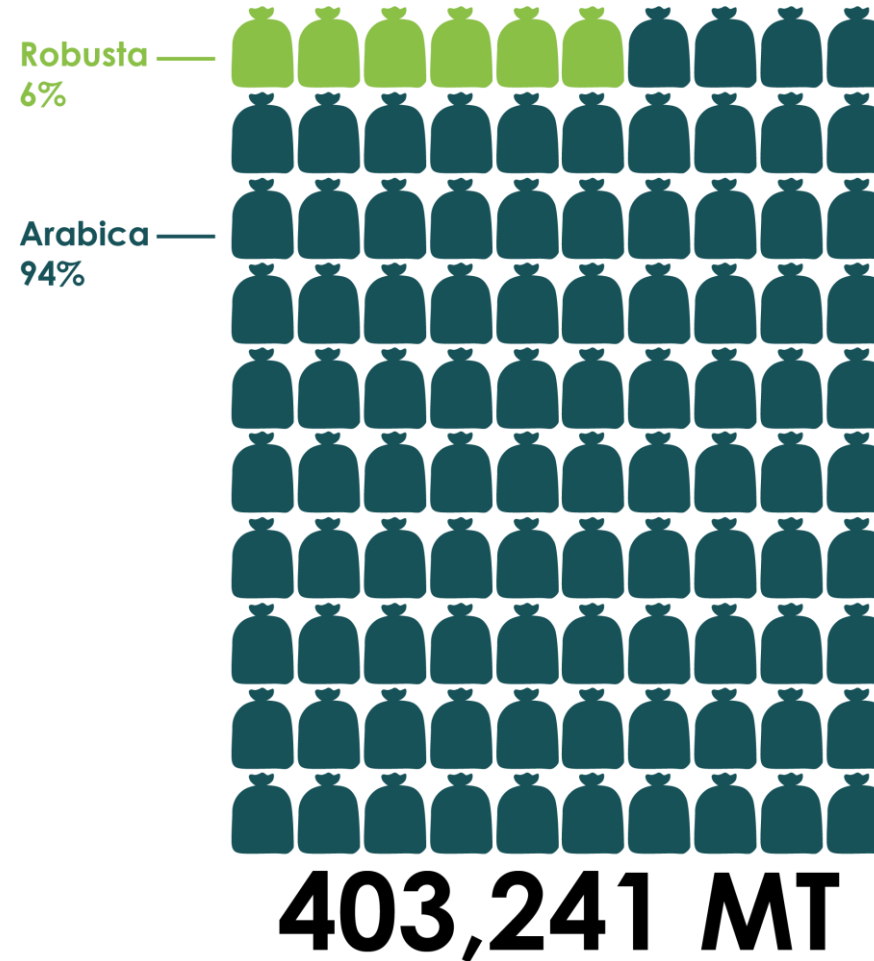


Most Rainforest Alliance Certified coffee was sold from producers in Brazil (42% of global sales), Colombia (20%), and Guatemala (7%).

Coffee 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 – Arabica / Robusta



Arabica sales makes up 94% of all global coffee sales.

Global Robusta sales makes up 6% of total coffee sales.

Coffee 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.

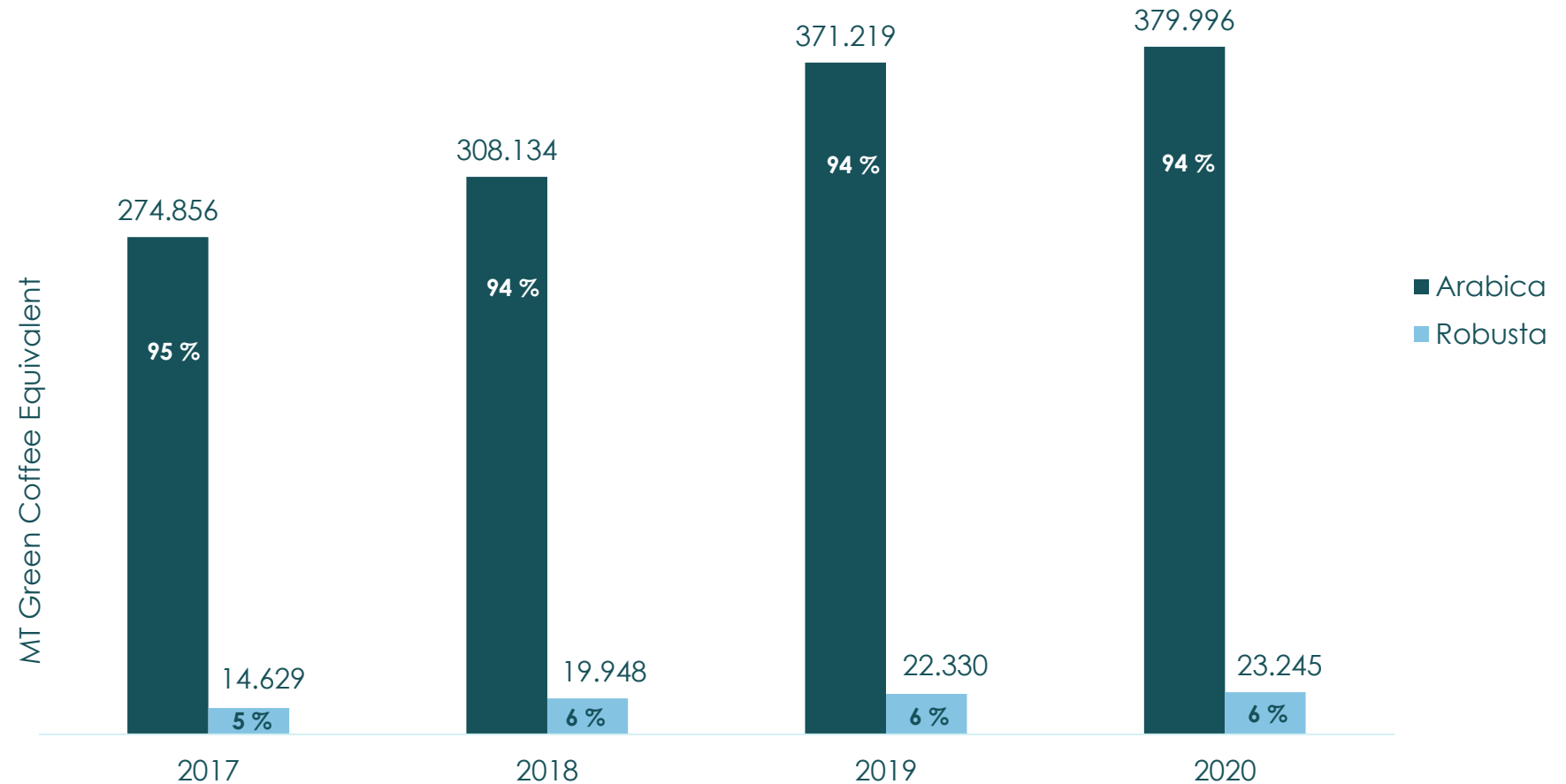
Global sales - split Arabica and Robusta

Arabica sales increased slightly by 1% vs. 2019 to 379,996 MT, driven by coffee sold from Latin America and Africa.

Robusta sales increased by 4% to 23,245 MT, due to growth in sales from Vietnam and Nicaragua.

The Arabica/Robusta ratio has been stable since 2017.

Coffee Certification Data Report 2020
Rainforest Alliance program



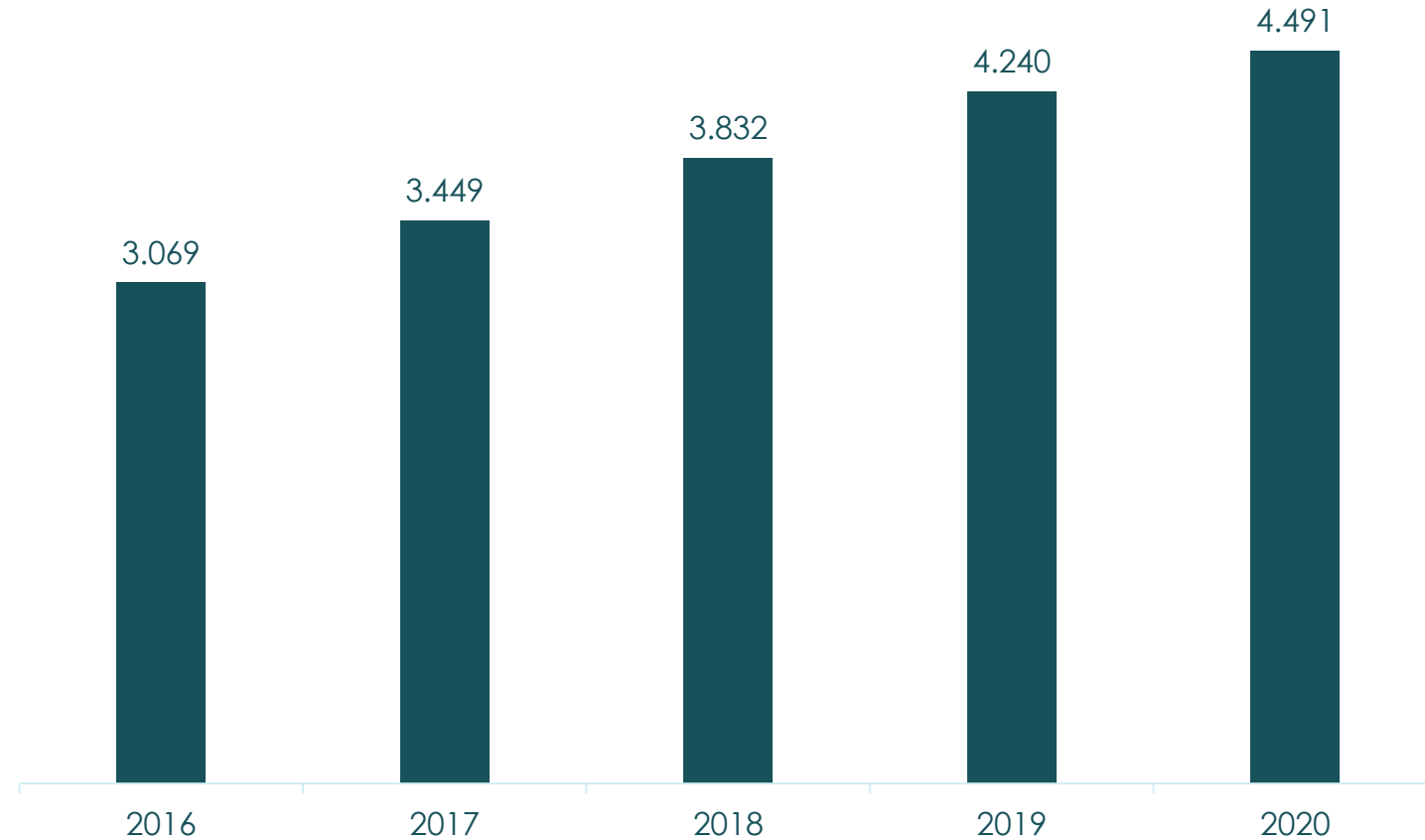
'Global sales' are all the confirmed volumes sold from a certified producer to the first buyer. Years are calendar years.

Registered supply chain actors

In 2020, the number of supply chain actors within the program increased by 6%.

All regions show an increase; Asia Pacific (+12%), Europe (+9%), Africa (+4%), Latin America (+2%), and North America (+2%).

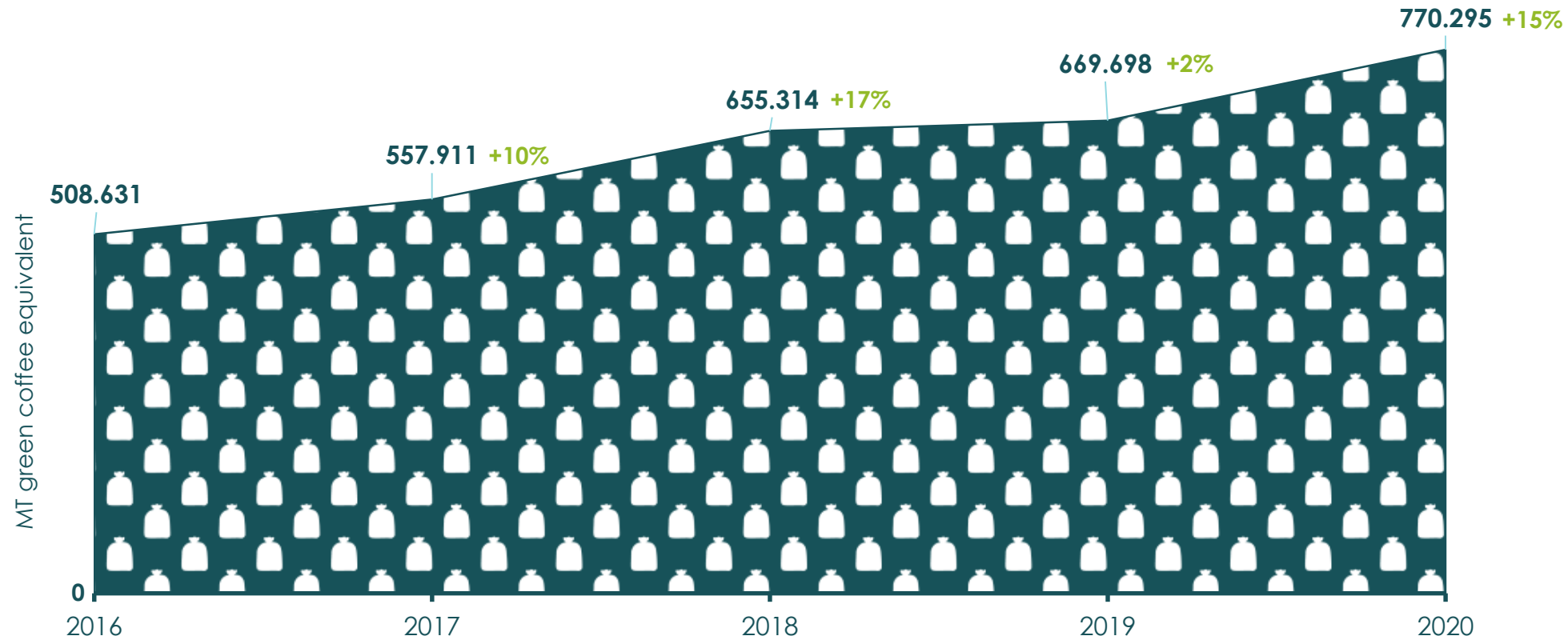
*Coffee Certification Data Report 2020
Rainforest Alliance program*



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

Estimated Production

Global estimated coffee production



The estimated certified volume increased by 15% (100,000 MT) vs. 2019.

Coffee Certification Data Report 2020
Rainforest Alliance program

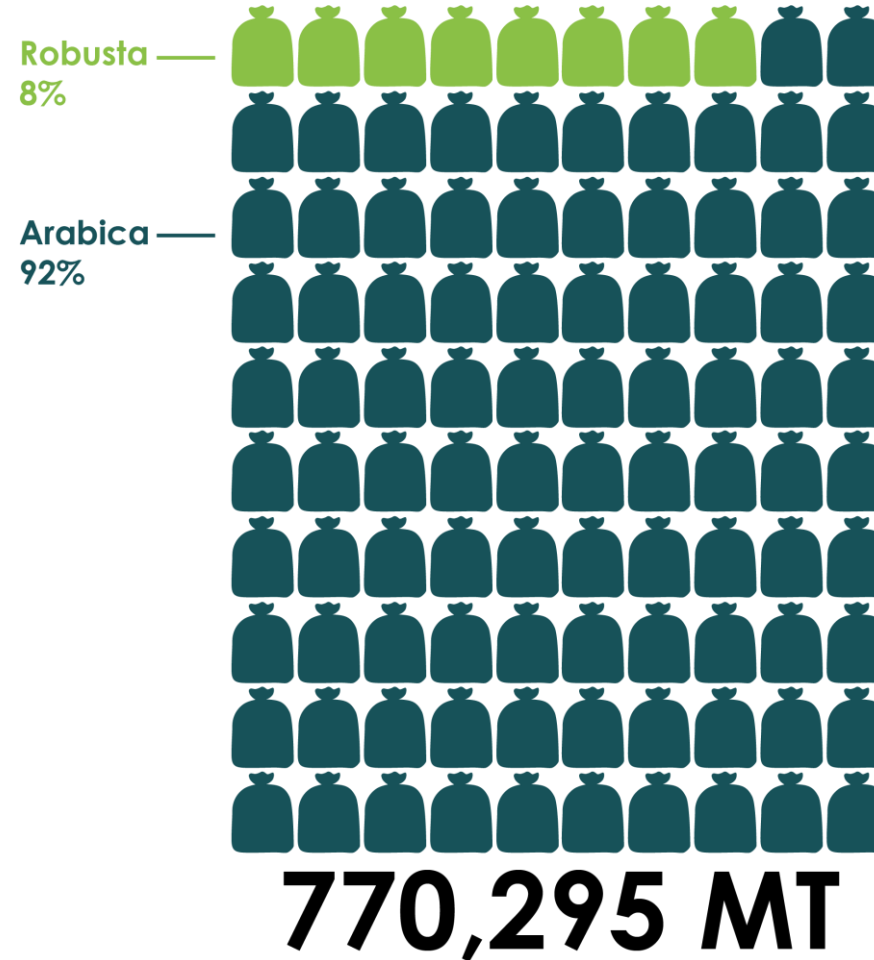
Estimated production is based on information from certificates valid on December 31, 2020.

Estimated production – Arabica / Robusta

The total certified volume Arabica increased by 16%, (primarily led by Latin America) and makes up 92% of total certified volume.

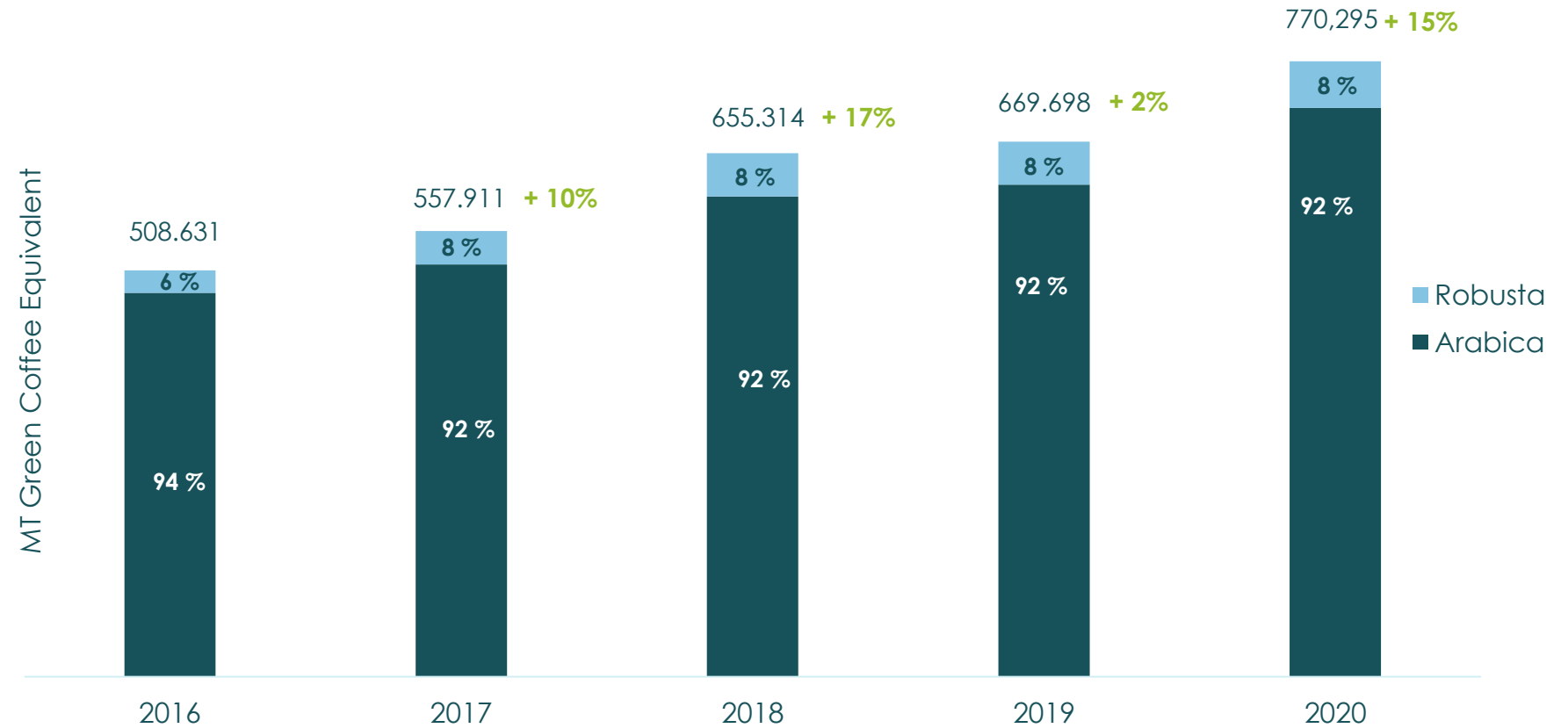
Total certified volume Robusta increased by 9%, due to growth in Latin America and Africa. Robusta makes up 8% of total certified volume.

Coffee Certification Data Report 2020
Rainforest Alliance program



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

Global estimated production



The estimated certified volume increased by 15% (100,000 MT) vs. 2019.

Arabica/Robusta ratio remains the same and aligned with ratio in sales.

Coffee Certification Data Report 2020
Rainforest Alliance program

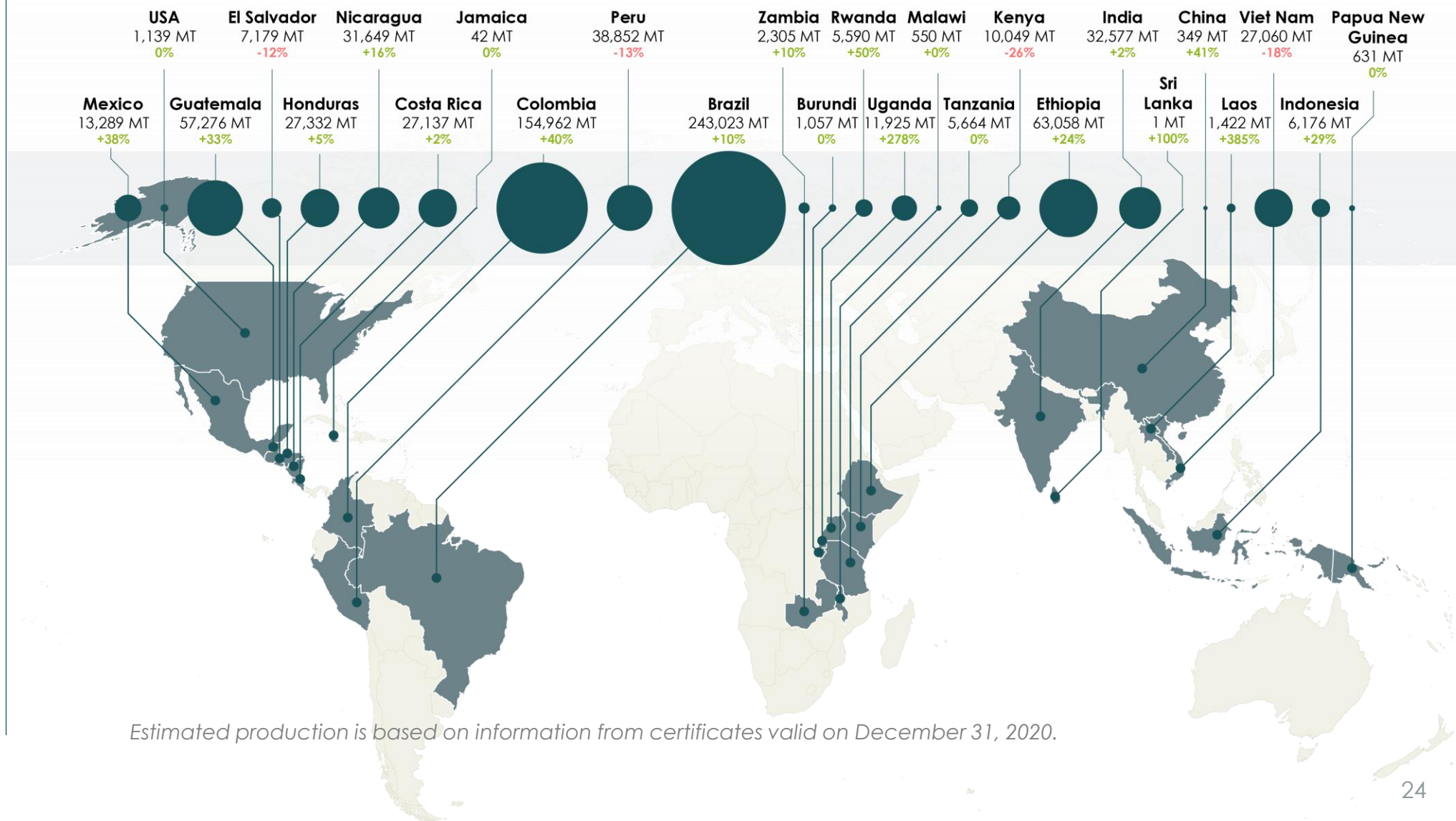
Estimated production is based on information from certificates valid on December 31, 2020.

The estimated certified production volume in Latin America showed the strongest absolute growth (in MT), led by Colombia, Brazil and Guatemala.

Africa had the largest relative growth (+24%), mainly driven by Ethiopia and Uganda due to more certified area and an increased number of farmer groups.

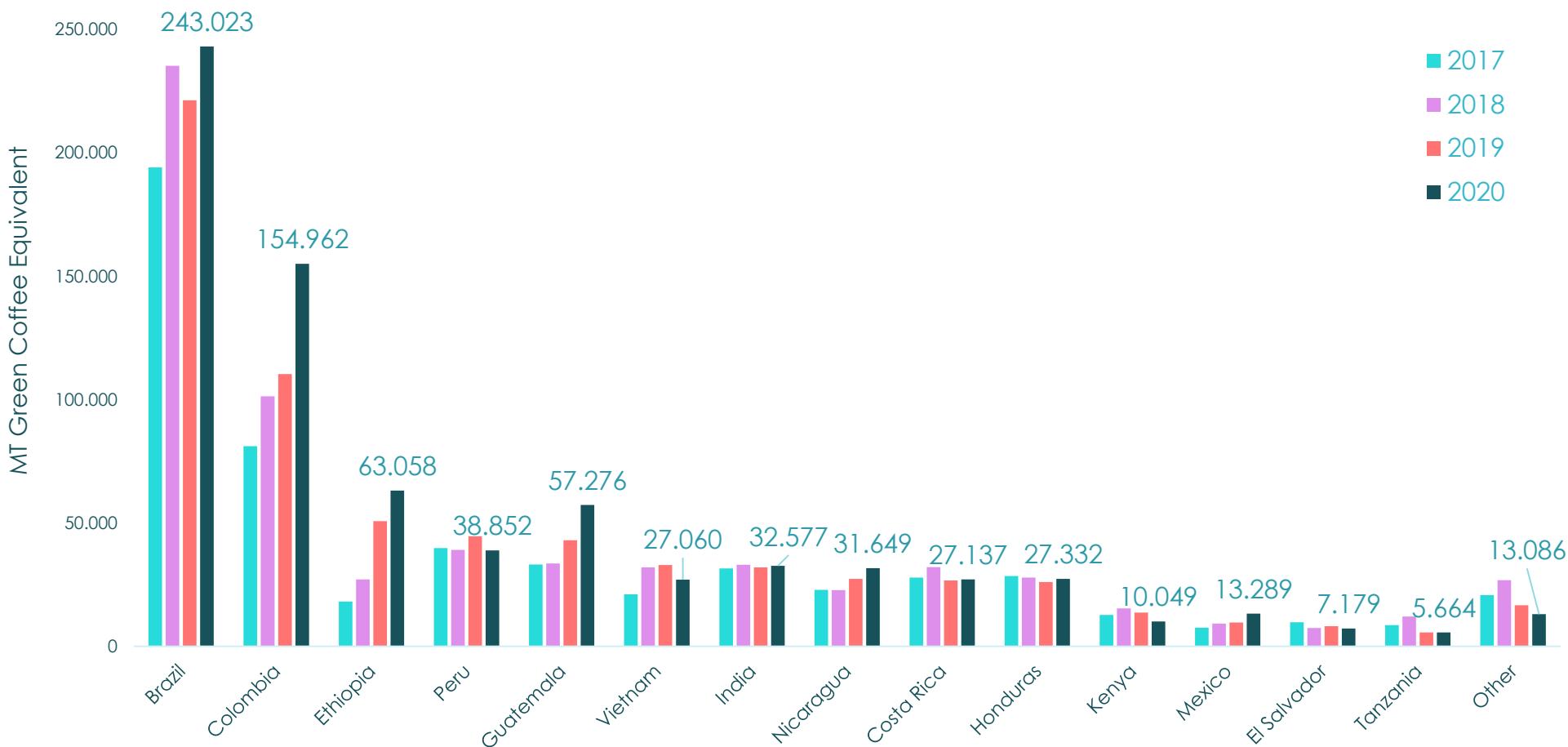
The estimated volume in Asia Pacific decreased by 4%, due to Vietnam where we saw a drop in the total number of certificate holders.

Estimated production per origin



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

Estimated production per origin



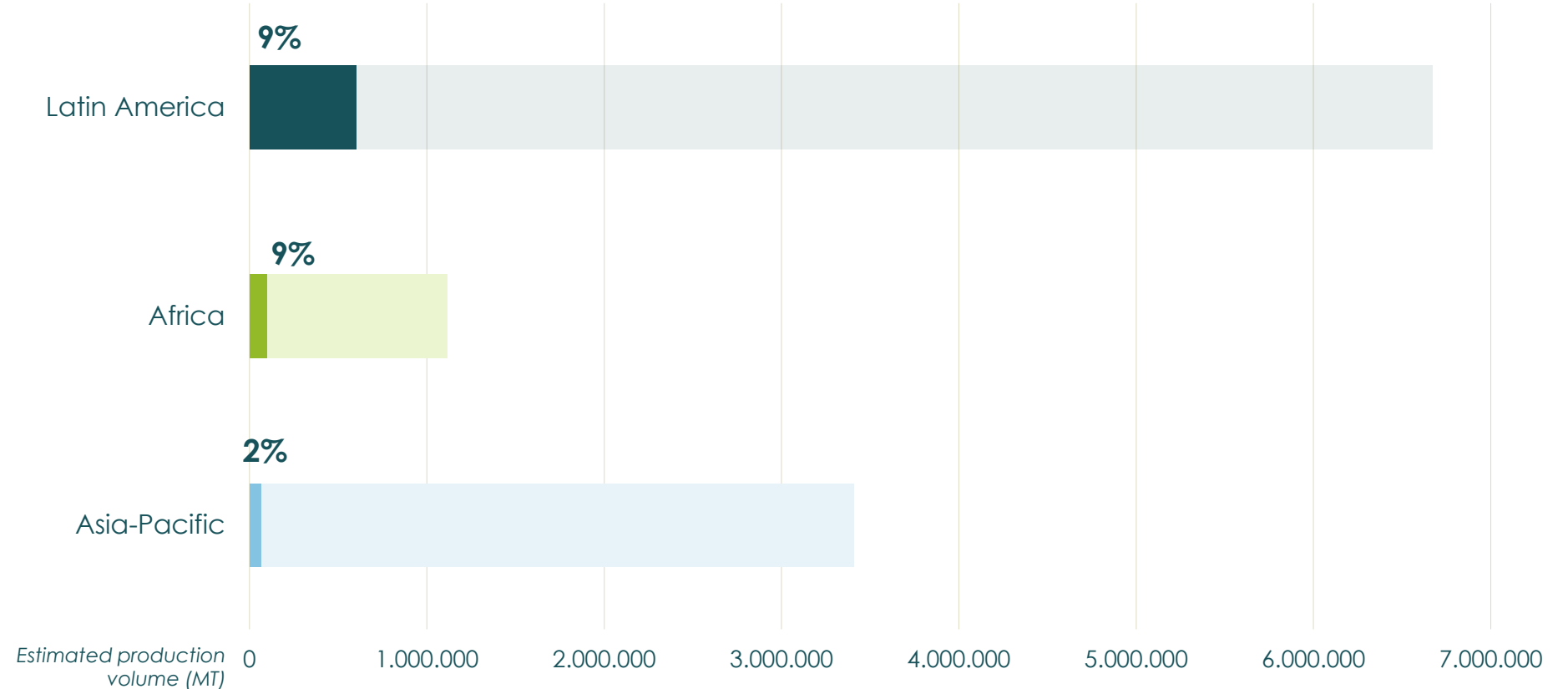
Estimated production is based on information from certificates valid on December 31, 2020.

The top 3 producing countries remain the same as last year: Brazil (32% of the global production), Colombia (20%), and Ethiopia (7%).

In 2020, of all coffee produced globally 7% was Rainforest Alliance certified.

On regional level, certified coffee from Latin America and Asia Pacific had the highest production market share.

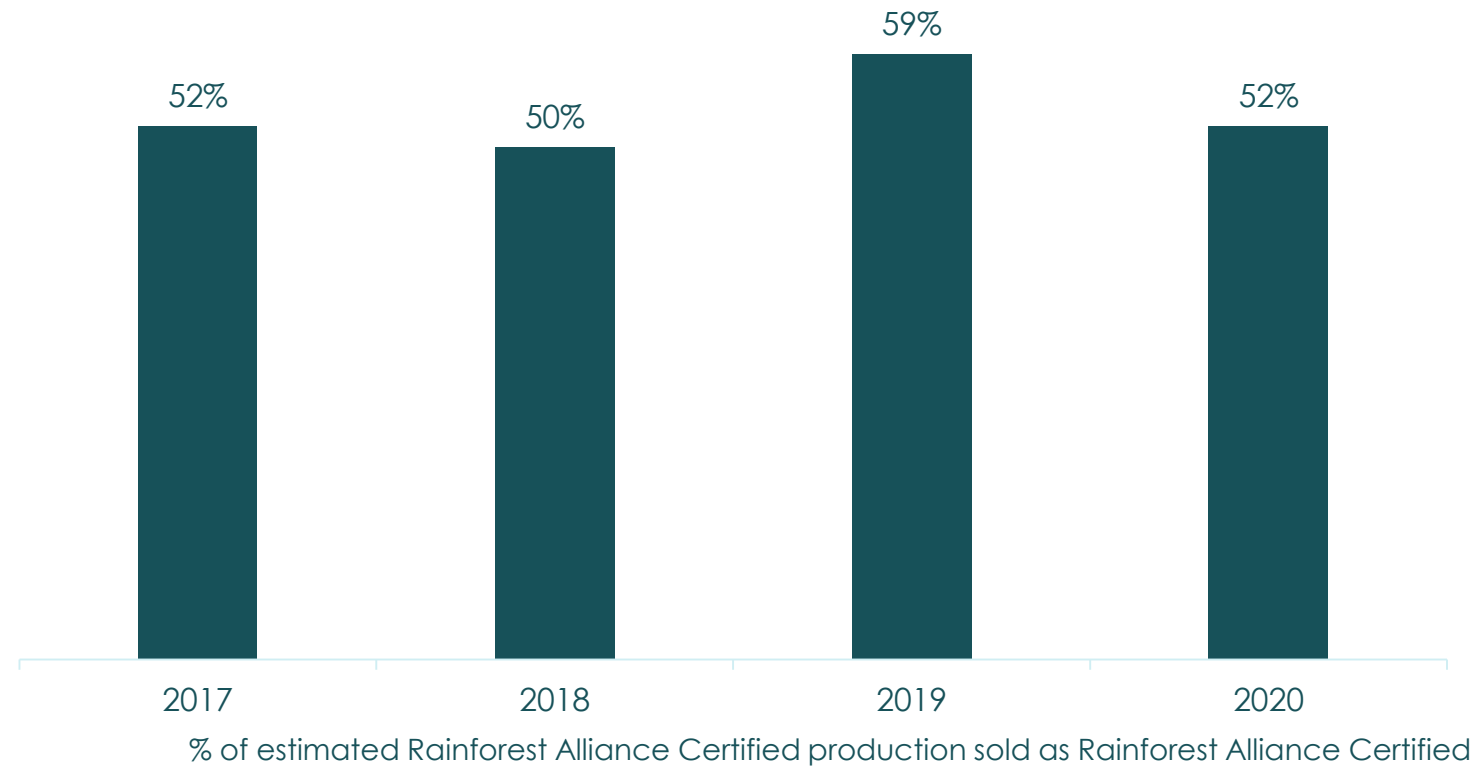
Production market share per region



Rainforest Alliance Certified estimated coffee production vs. estimated regional production (Source [ICO](#))

Supply and Demand ratio

Supply – Demand ratio



Producers sold on average 52% of their estimated Rainforest Alliance Certified coffee volume as Rainforest Alliance Certified.

Coffee Certification Data Report 2020
Rainforest Alliance program

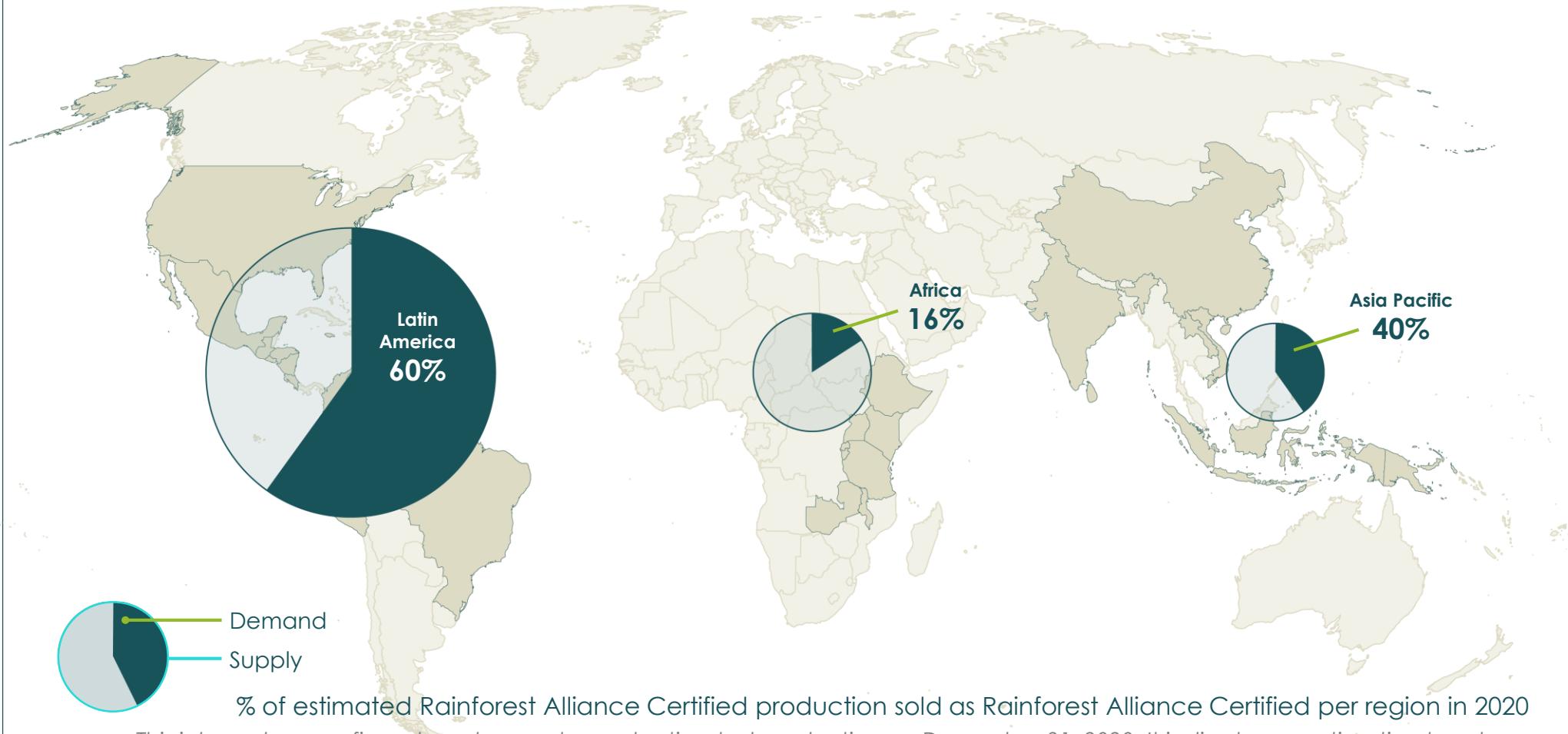
This is based on confirmed producer sales and estimated production on December 31, 2020. It indicates an estimation, not an absolute number.

Supply – Demand per region

The global supply and demand ratio for the Rainforest Alliance coffee program decreased by 12% vs. 2019.

Latin America has the highest share of certified sales with 60% of certified production sold as Rainforest Alliance Certified.

Coffee Certification Data Report 2020
Rainforest Alliance program



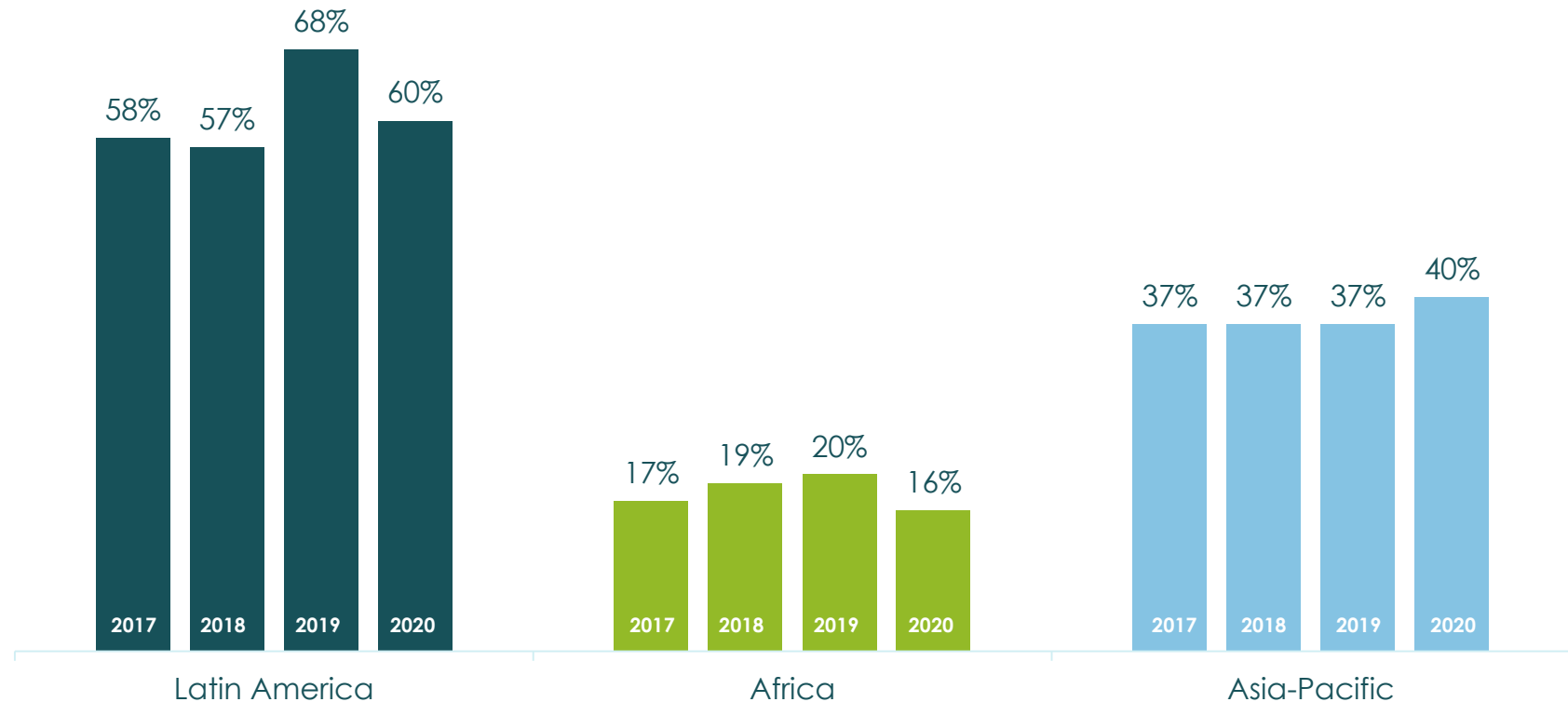
This is based on confirmed producer sales and estimated production on December 31, 2020. It indicates an estimation trend, not an absolute number.

Supply – Demand per region

The decrease in the global supply and demand ratio for the Rainforest Alliance coffee program is reflected in Latin America and Africa.

In Asia Pacific producers sold on average more of their certified production as certified compared to previous years.

Coffee Certification Data Report 2020
Rainforest Alliance program



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



40%

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

28% UTZ

18% Organic

14% Fairtrade

16% Other

Double-certification
Rainforest Alliance and
UTZ is the predominant
combination with 28%.

Coffee Certification Data Report 2020
Rainforest Alliance program

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

Certification data

Estimated production (MT)

Country	2018	2019	2020
Global	655,314	669,698	770,295
Brazil	235,214	221,283	243,023
Burundi	455	1,057	1,057
China	-	247	349
Colombia	101,313	110,330	154,962
Costa Rica	32,070	26,696	27,137
El Salvador	7,393	8,144	7,179
Ethiopia	27,150	50,698	63,058
Guatemala	33,579	43,025	57,276
Honduras	27,886	26,090	27,332
India	32,995	31,995	32,577
Indonesia	5,505	4,793	6,176
Jamaica	37	42	42
Kenya	15,336	13,658	10,049
Laos	1,007	293	1,422
Malawi	555	550	550
Mexico	9,272	9,601	13,289
Nicaragua	22,765	27,279	31,649
Papua New Guinea	631	631	631
Peru	39,087	44,588	38,852
Rwanda	6,827	3,733	5,590
Sri Lanka	-	-	1
Tanzania	12,056	5,641	5,664
Uganda	7,969	3,153	11,925
USA	1,139	1,139	1,139
Vietnam	31,941	32,933	27,060
Zambia	3,131	2,100	2,305

Global sales (MT)

Country	2018	2019	2020
Global	328,082	393,550	403,241
Brazil	138,722	164,480	169,066
China	-	200	1
Colombia	49,601	70,110	79,373
Costa Rica	20,215	16,632	20,273
El Salvador	4,932	5,315	4,143
Ethiopia	3,310	4,282	4,150
Guatemala	23,637	30,847	29,487
Honduras	21,123	28,323	21,573
India	4,253	3,955	4,183
Indonesia	5,647	4,950	3,716
Jamaica	3	8	5
Kenya	4,948	4,348	5,094
Mexico	6,059	5,476	9,737
Nicaragua	10,131	13,692	14,575
Peru	13,154	16,138	11,379
Rwanda	742	1,936	2,111
Tanzania	2,156	2,155	1,424
Uganda	1,630	2,465	2,905
Vietnam	16,660	17,088	18,836
Other*	1,161	1,150	1210

*Other countries are Burundi, Laos, Malawi, and Zambia

Number of farmers

	2018	2019	2020
Global	228,271	194,294	228,430
Africa	183,360	146,845	171,304
Asia	14,771	13,015	17,418
Latin America	30,139	34,433	39,707
North America	1	1	1

Number of workers (permanent & seasonal)

	2018	2019	2020
Global	369,087	286,461	334,449
Africa	77,730	80,379	89,805
Asia	84,414	36,068	44,354
Latin America	206,751	169,822	200,100
North America	192	192	190

Area (Hectare)

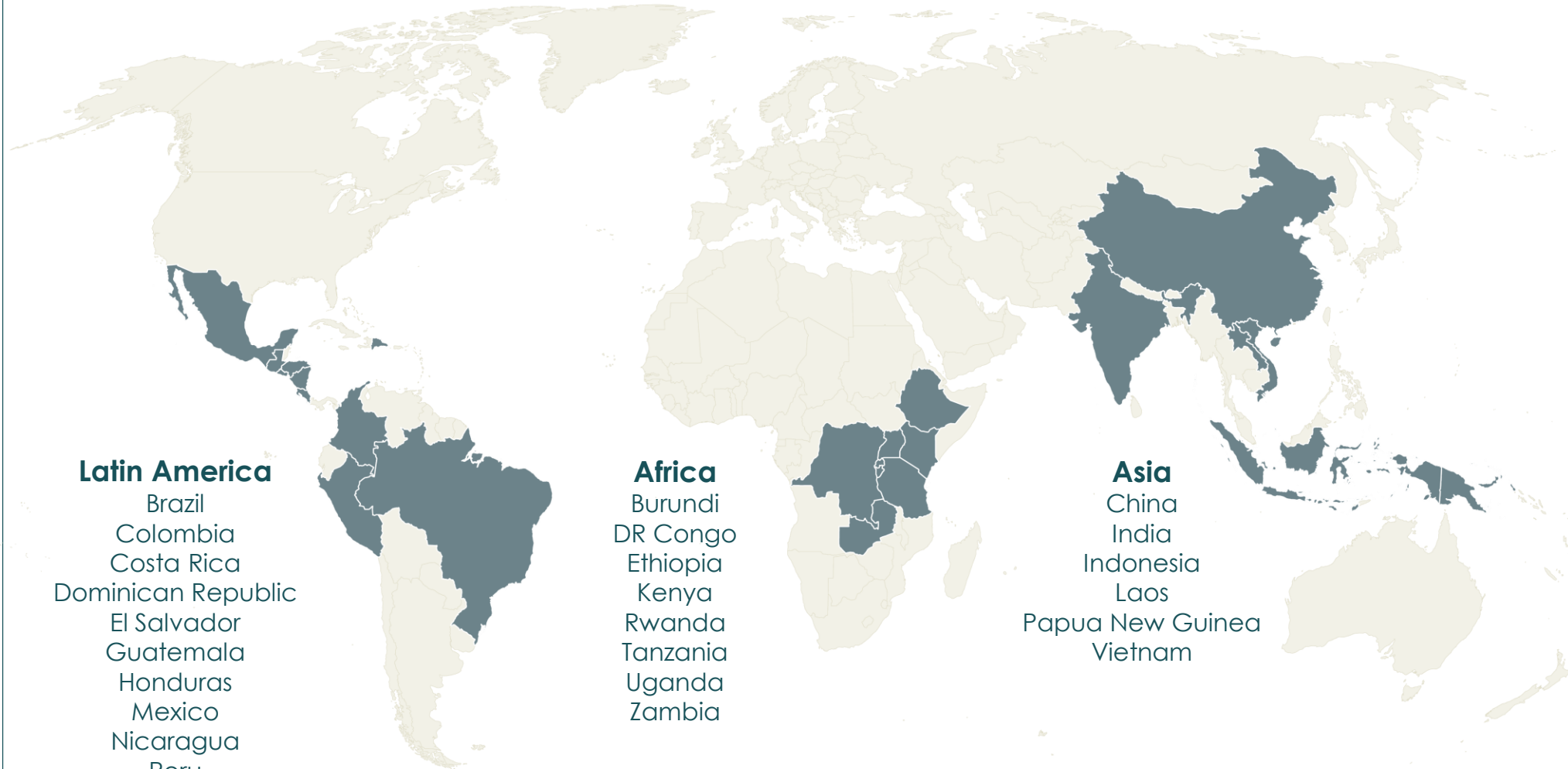
	2018	2019	2020
Global	470,841	470,611	519,828
Africa	143,333	120,372	142,396
Asia	49,969	45,114	46,841
Latin America	276,413	303,999	329,464
North America	1,126	1,126	1,126



UTZ Coffee program

Program reach

Geographical program reach



With the Dominican Republic added to the map, the number of countries with UTZ certified coffee producers increased to 24.

Coffee Certification Data Report 2019
UTZ program

Program reach



772,882

Area (hectare)

Relative growth
2019-2020:
+7%



326,726

Number of farmers

Relative growth
2019-2020:
+6%



1,235,526

Estimated production (MT)

Relative growth
2019-2020:
+14%



183,834

Number of workers
(seasonal and permanent)



■ Male ■ Female

Relative growth
2019-2020:
-8%

Program reach



In 2020, the estimated certified production area increased slightly (+7%) compared to 2019. The growth was mainly driven by gains in Africa (+15%) and to a lesser extent in Latin America (+9%).

Area (hectare)



In 2020, the number of farmers increased by 6% vs. 2019, driven by Asia Pacific (+31%) and Latin America (+15%). The number of farmers in Africa decreased by 5%, due to lower numbers in Burundi, Democratic Republic of the Congo and Ethiopia. Nevertheless, there were strong gains in Tanzania and Rwanda.

Number of farmers



In 2020, the estimated certified volume increased by 14% vs 2019, mainly led by Latin America (+19%). Asia and Pacific showed an increase of 7%, whereas Africa saw a drop of 9%. The top 3 producing countries are Brazil, Vietnam, and Colombia.

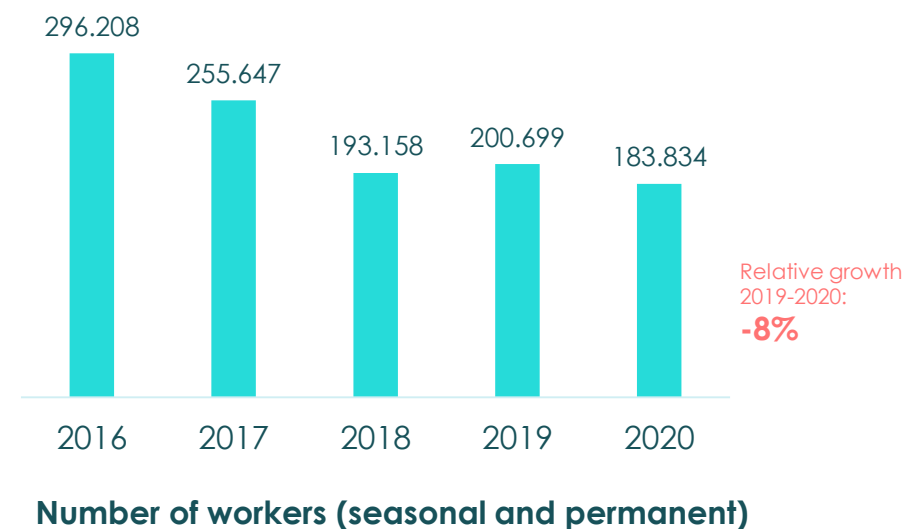
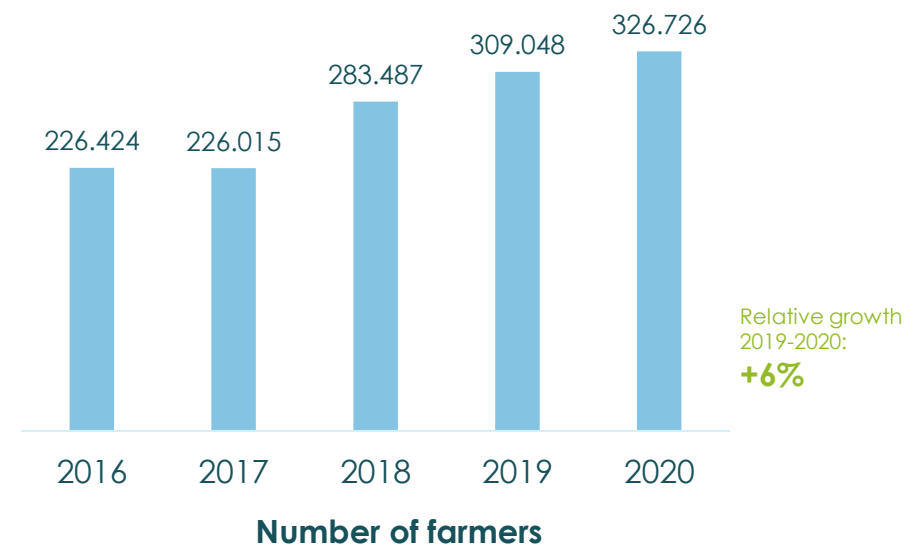
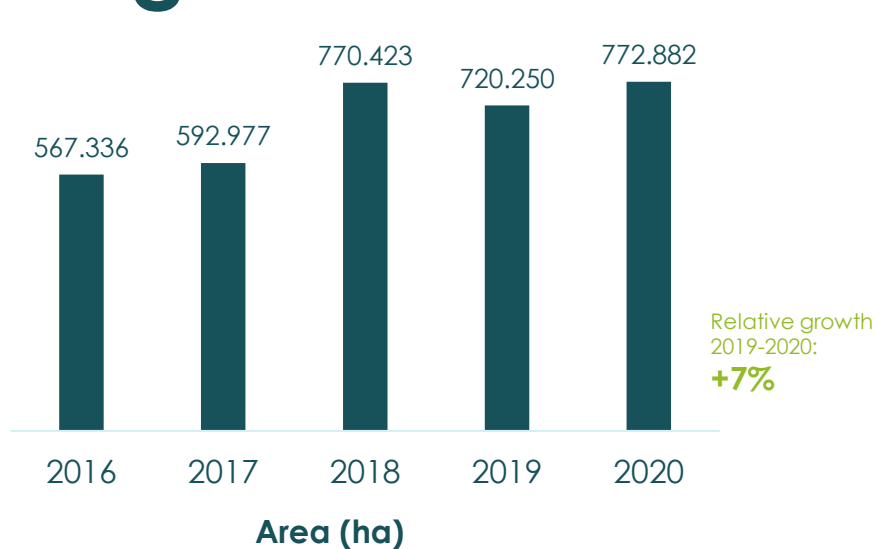
Estimated production (MT)



In 2020, as opposed to the other indicators, the number of workers decreased by 8% compared to 2019. This trend is reflected on a regional level, with the largest drop in Latin America (-14%). The lower number can partly be explained by COVID-19 restrictions on work and travel.

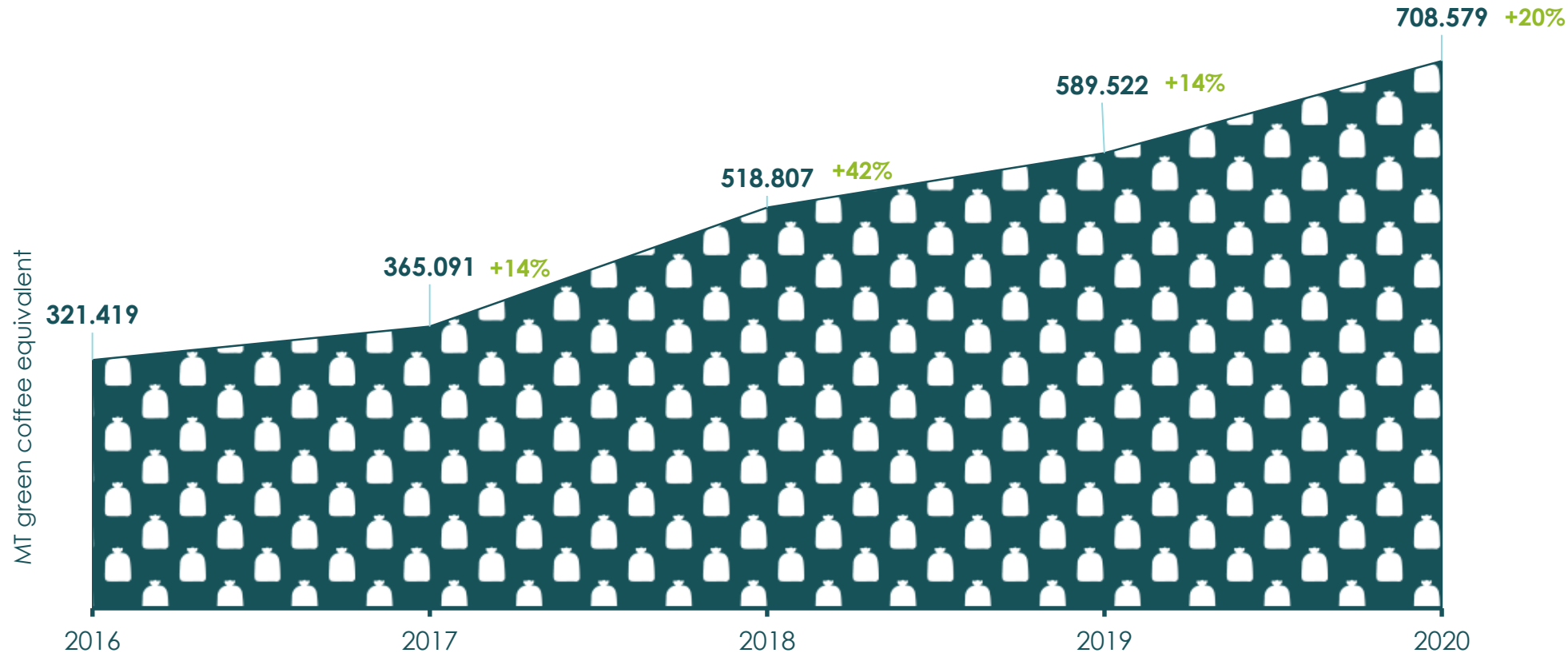
Number of workers
(seasonal and permanent)

Program reach



Global sales

Global coffee sales



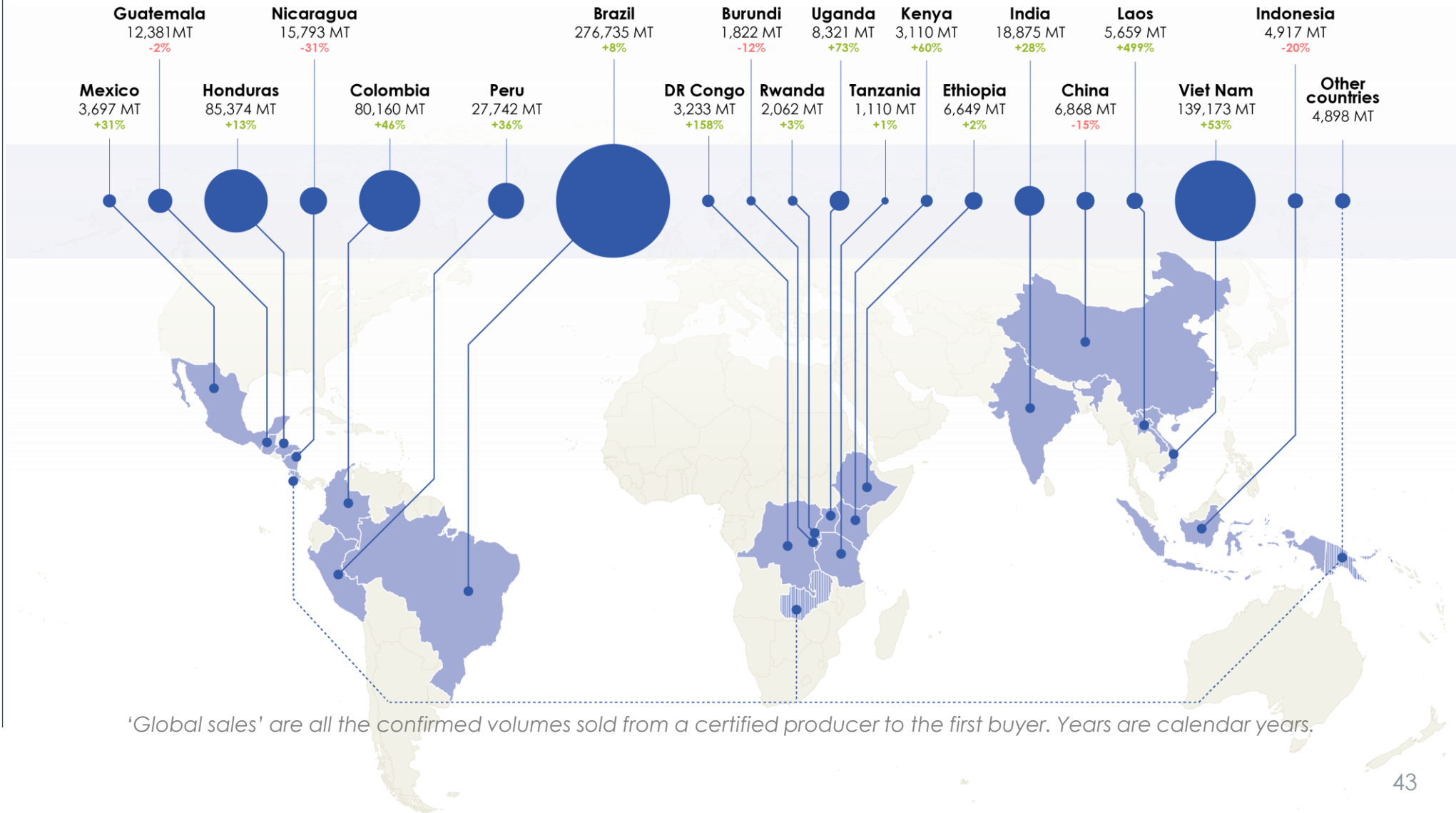
In line with previous years, the global UTZ coffee sales increased by 20%, with the highest increase in absolute terms in Latin America.

Most UTZ coffee sales came from Brazil, Vietnam, and Honduras.

Coffee 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 increase is reflected across all regions; Asia and Pacific (+45%) with the biggest growth in absolute numbers in Vietnam, Africa (+40%), and Latin America (+12%).

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



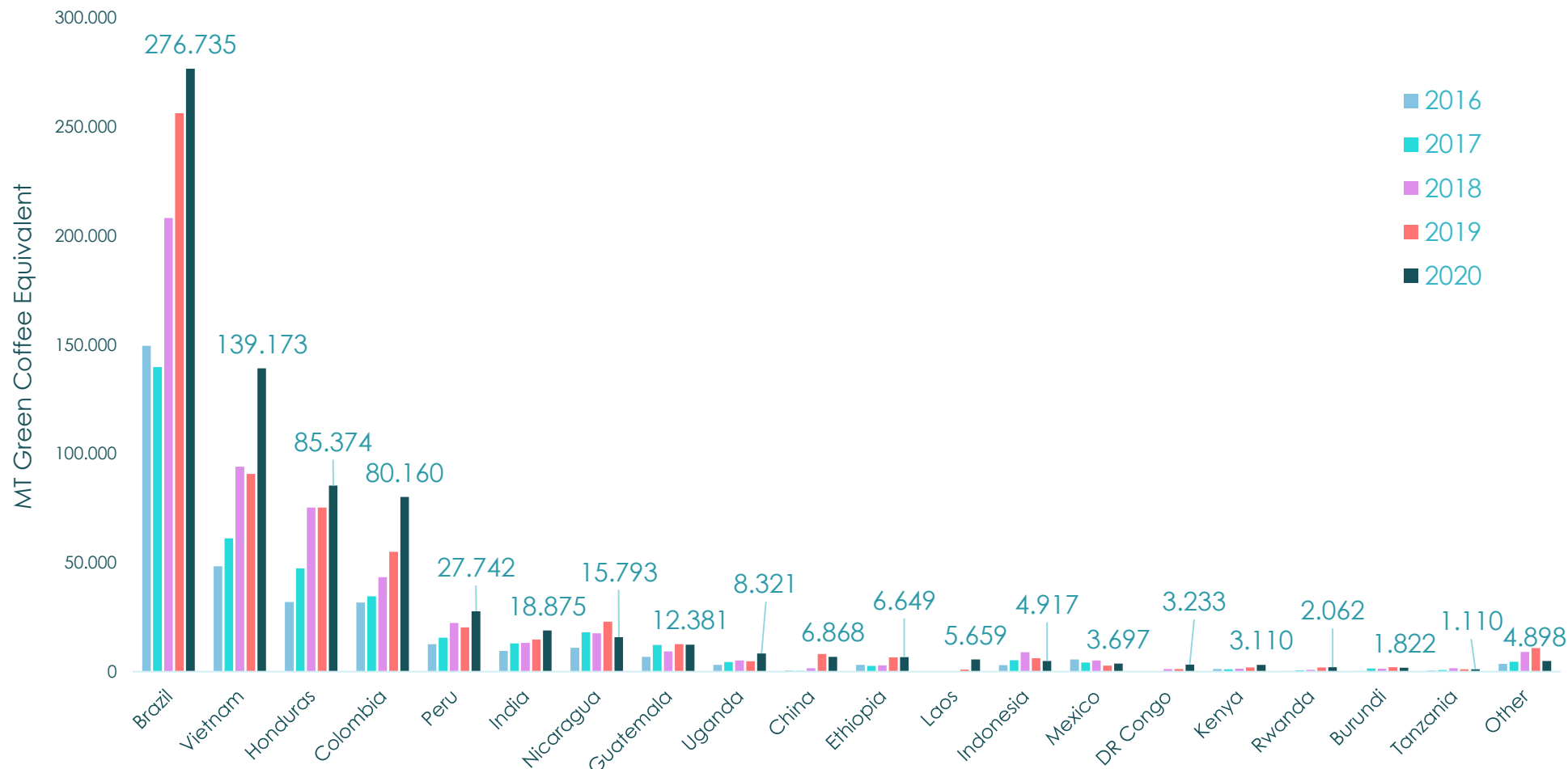
Most UTZ certified coffee was sold from producers in Brazil (39% of global sales), Vietnam (20%), and Honduras (12%).

The strong sales growth in Vietnam is multi-factored; a rising roaster and consumer demand for certified coffee, especially some of the big roasters increased their demand for certified Robusta, a large production volume, and coffee prices in Vietnam are favorable compared to other countries.

In Colombia, a perceived scarcity of UTZ coffee triggered large purchases mid-2020.

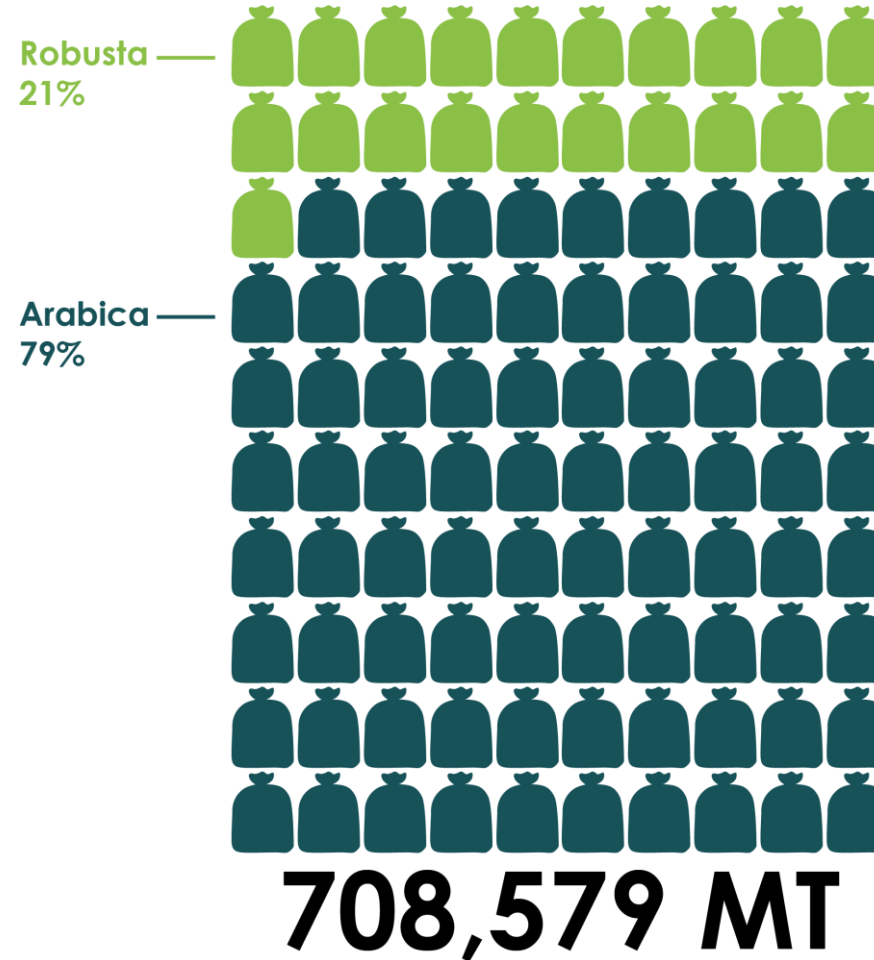
Coffee Certification Data Report 2020
UTZ program

Global sales per origin



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

Global sales - split Arabica / Robusta



Arabica sales makes up 79% of all global coffee sales.

Global Robusta sales makes up 21% of total coffee sales.

Coffee Certification Data Report 2020
UTZ program

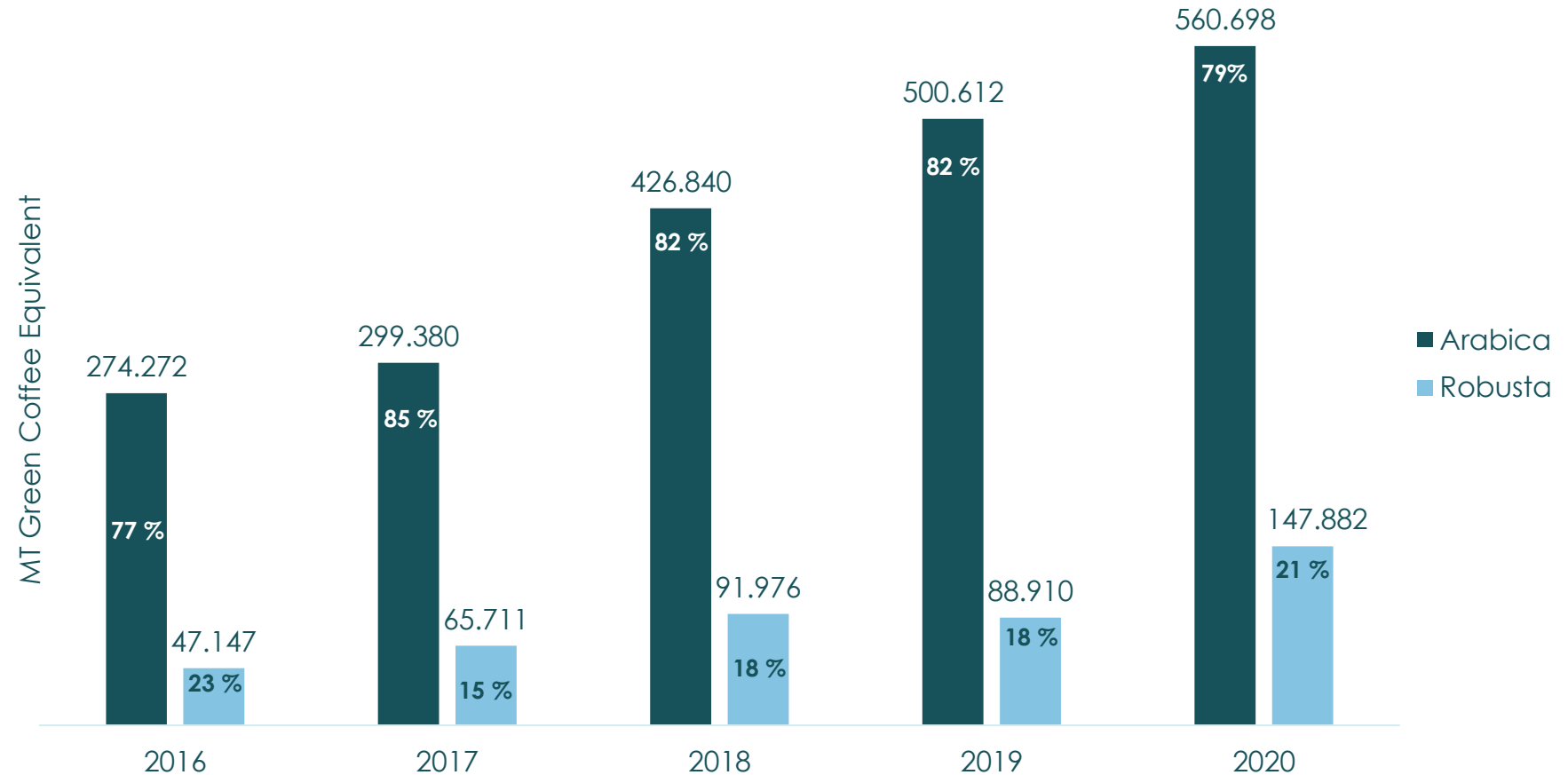
'Global sales' are all the confirmed volumes sold from a certified producer to the first buyer. Years are calendar years.

Global sales - Arabica and Robusta

Arabica sales increased by 12% vs. 2019 to 560,698 MT, mainly driven by coffee sold from Africa and Latin America.

Robusta sales grew strongly (+66%) to 147,882 MT due to a large growth from Vietnam.

Coffee Certification Data Report 2020
UTZ program



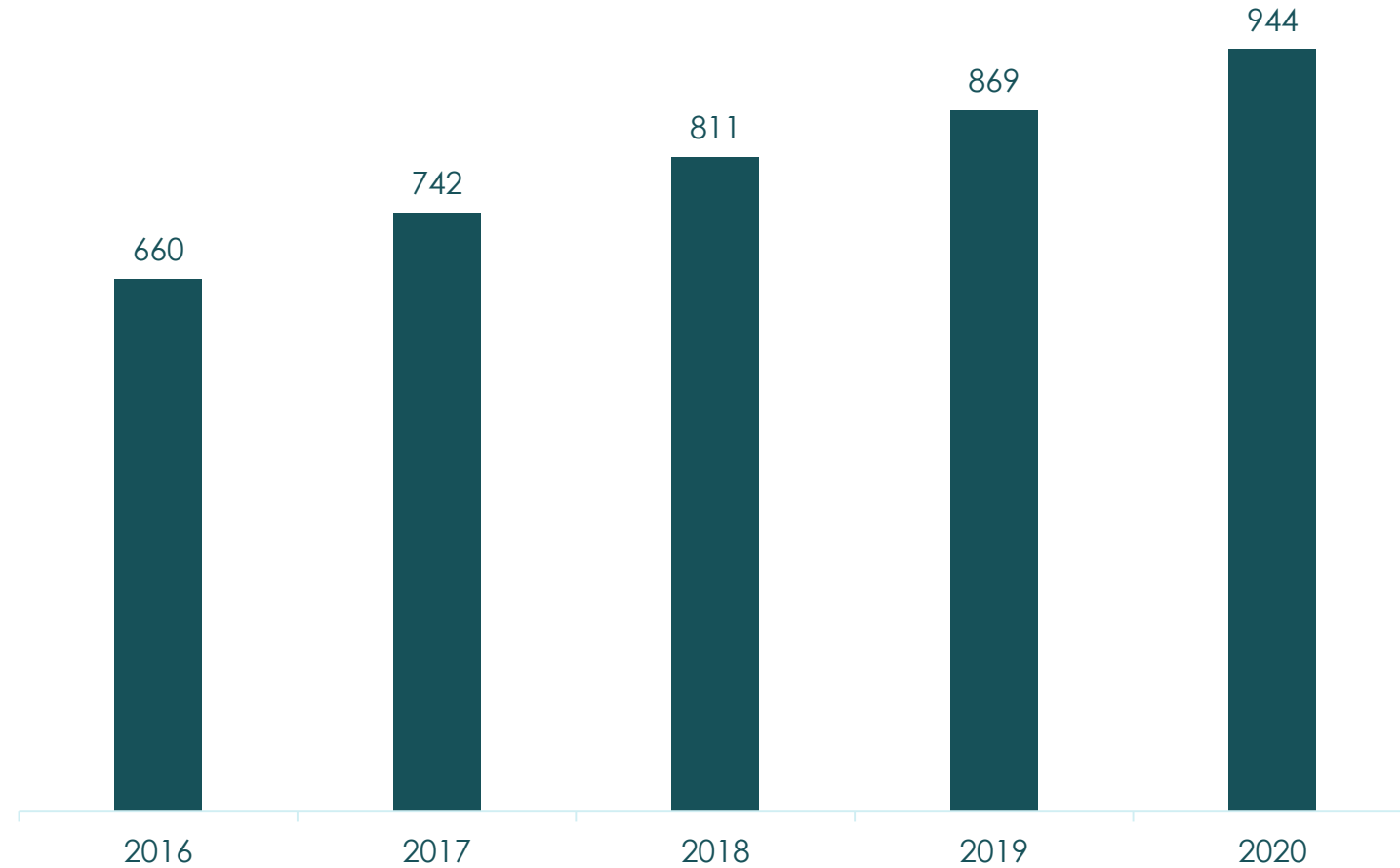
'Global sales' are all the confirmed volumes sold from a certified producer to the first buyer. Years are calendar years.

Registered supply chain actors

In 2020, the number of supply chain actors within the program increased by 9%.

The number of supply chain actors increased across all regions, with the largest increase in Latin America (+13%). Asia Pacific saw a growth of 10%, North America 6%, Europe 4%, and Africa 3%.

Coffee Certification Data Report 2020
UTZ program



'Supply Chain Actors' include various actors, including traders, roasters, and retailers

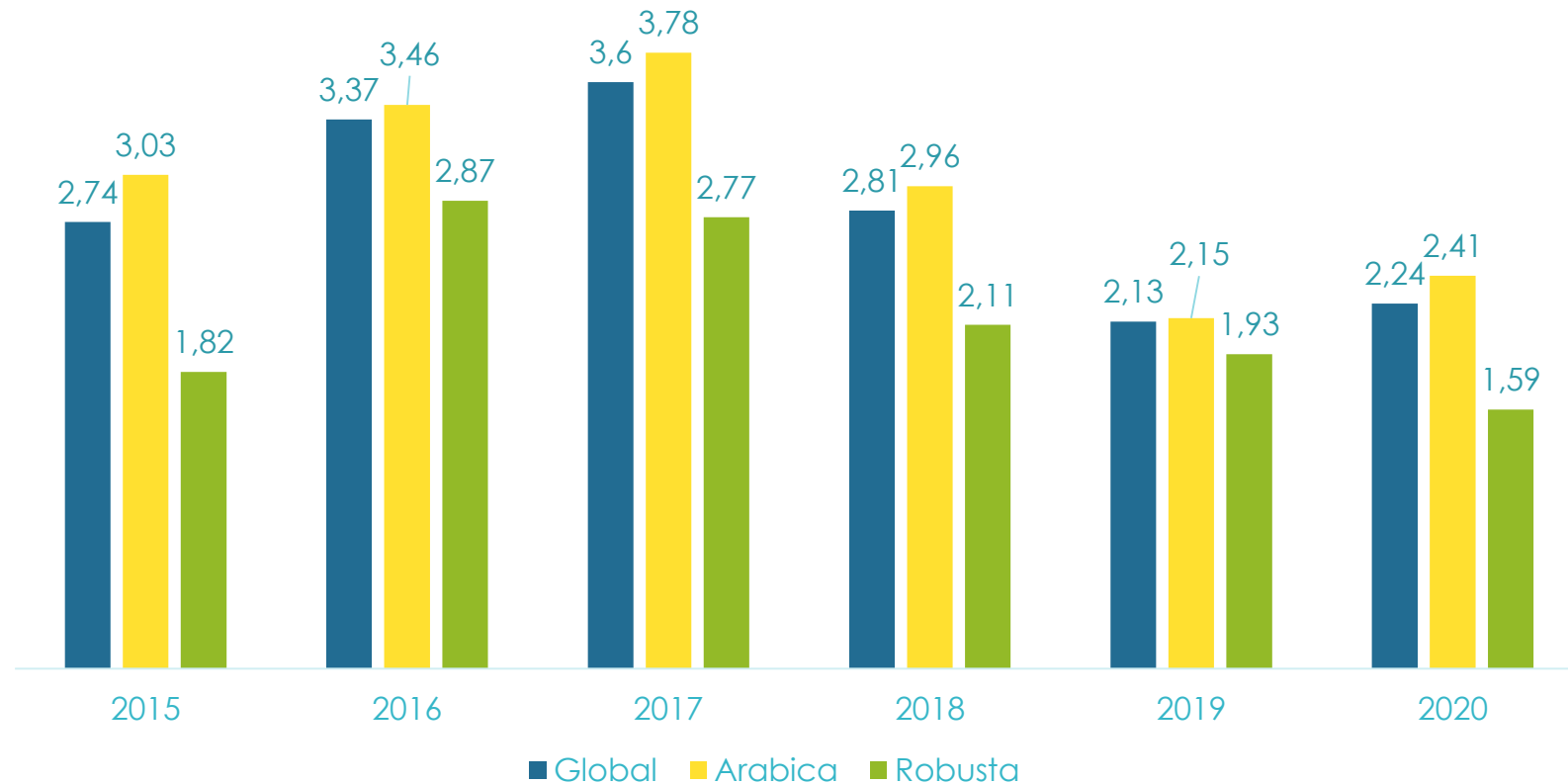
Premium

UTZ global coffee premium increased with 4% vs. 2019 to 2.24 \$c/lbs.

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

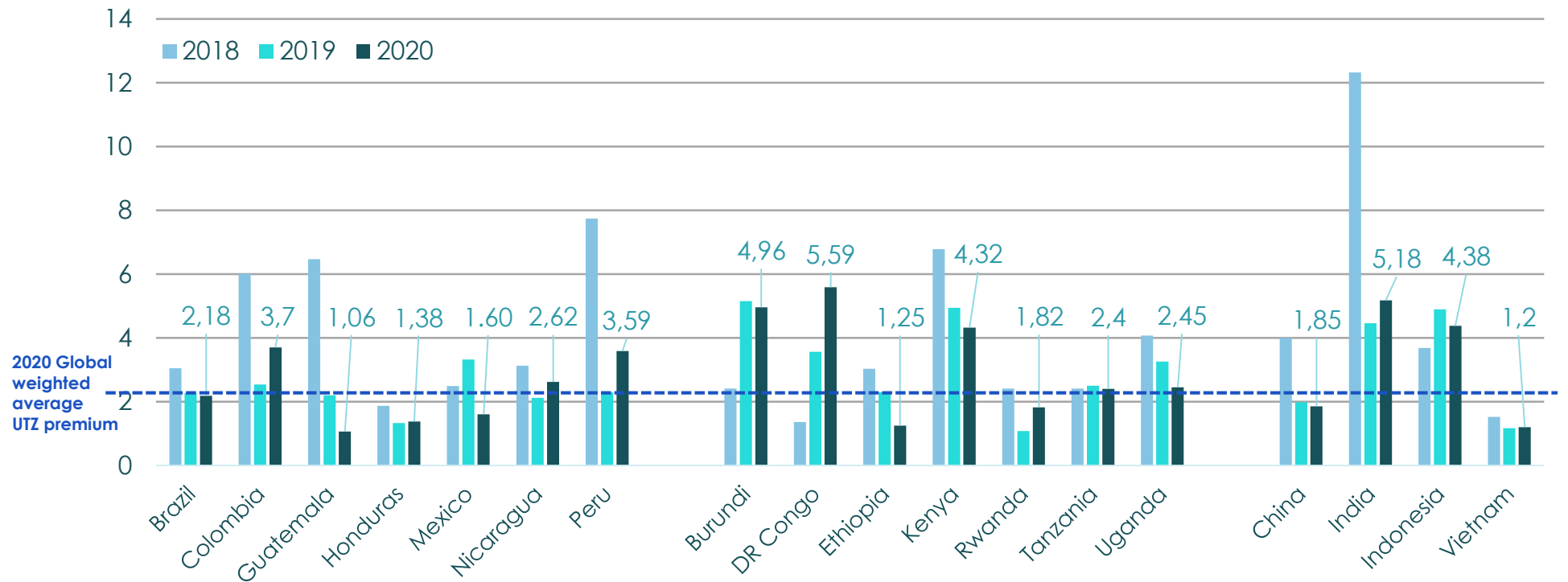
In line with previous years, a higher premium is paid for Arabica. The gap with Robusta premiums increased as they grew in opposite directions.

Global average UTZ Premium (\$c/lbs)



Premium per country – per continent

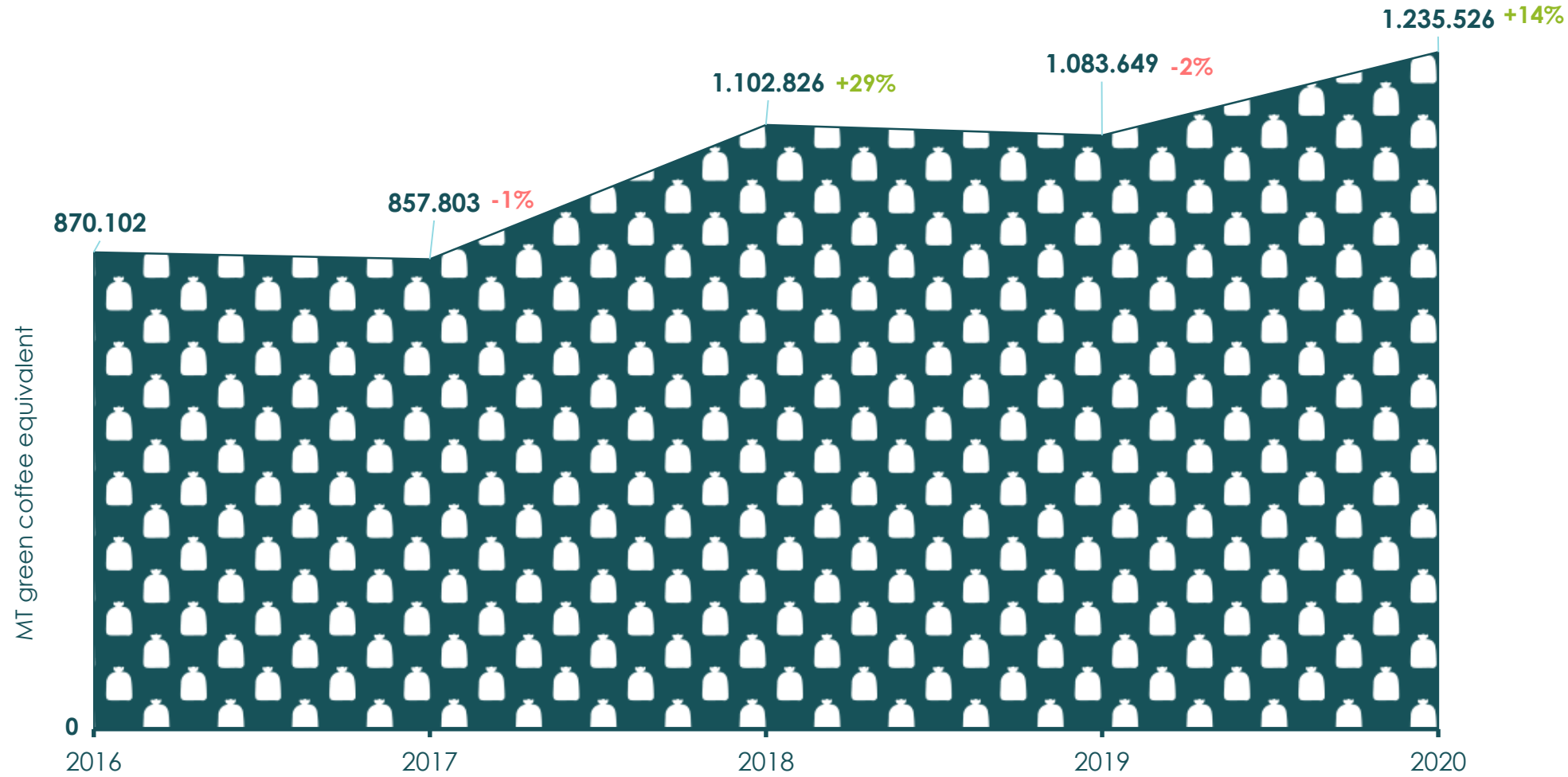
Average UTZ Premium (\$c/lbs)



Overall we saw an increase in global average UTZ premium, though the average premium per country differs a lot.

Estimated Production

Global estimated coffee production



The estimated certified volume increased by 14% (152,000 MT) vs. 2019.

Coffee Certification Data Report 2020
UTZ program

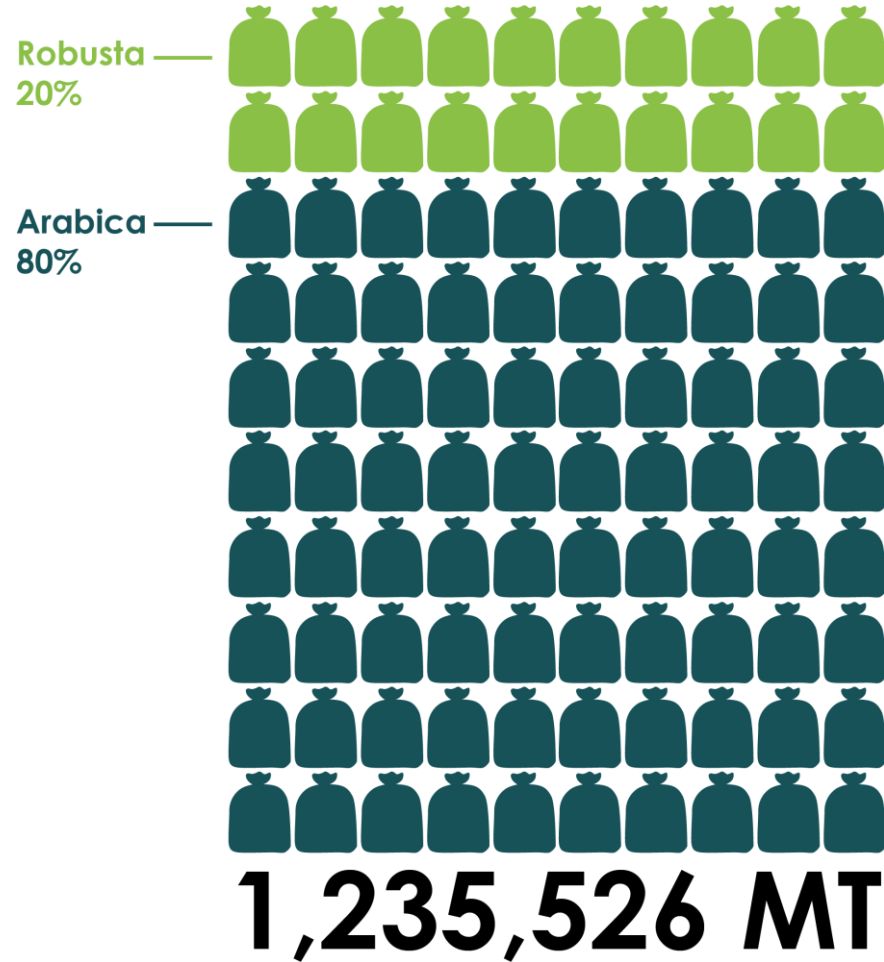
Estimated production is based on information from certificates valid on December 31, 2020 and those under review where a positive certification decision is expected.

Estimated production – Arabica / Robusta

The total certified volume Arabica increased by 18%, (primarily led by Latin America) and makes up 80% of total certified volume.

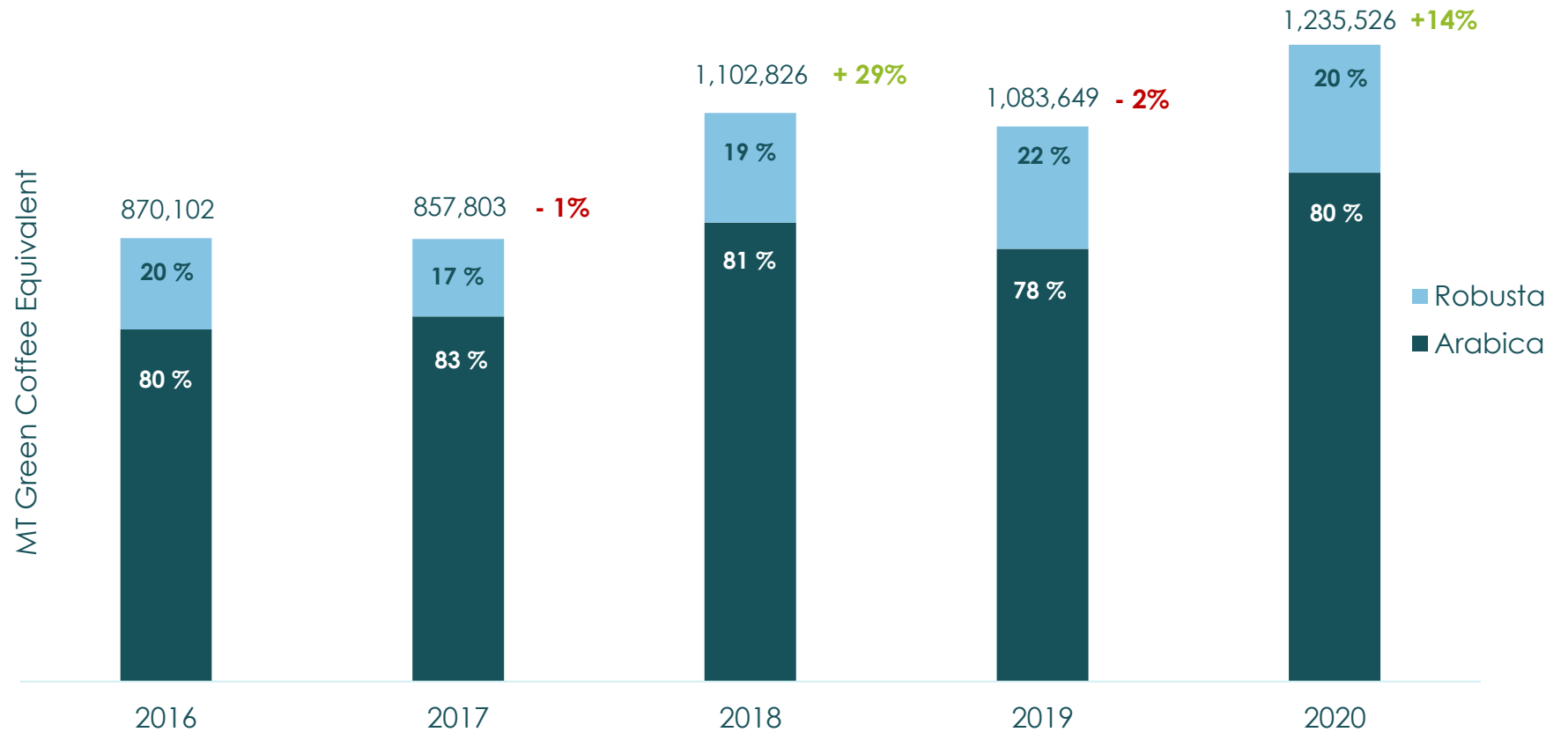
Total certified volume Robusta increased by 5%, due to growth in Latin America and Africa. Robusta makes up 20% of total certified volume.

Coffee 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.

Global estimated production



The estimated certified volume increased by 14% (152,000 MT) vs. 2019.

Minor shift from Robusta back to Arabica due to the strong increase Arabica volume in Latin America and Asia Pacific.

Coffee 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.

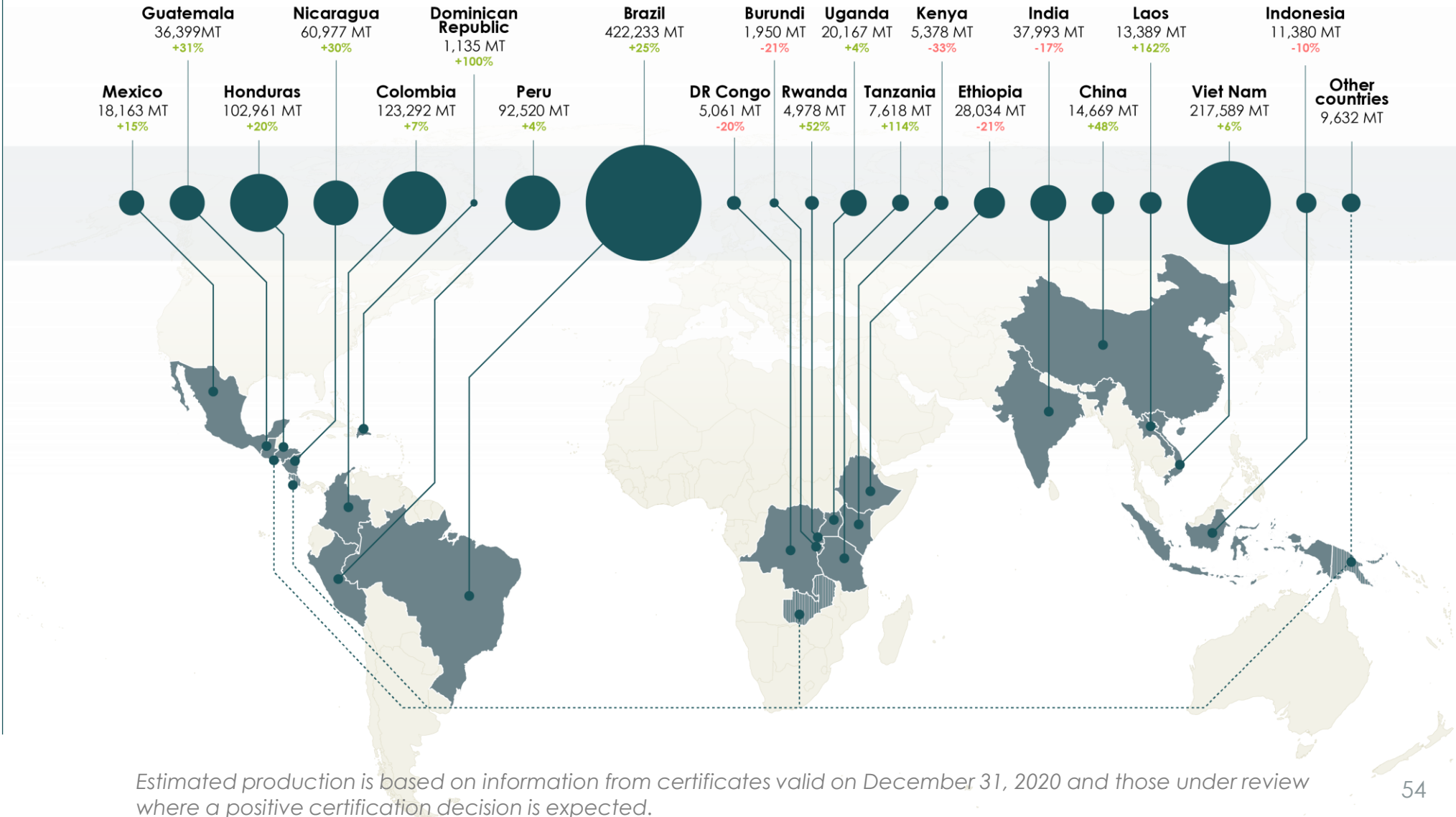
Estimated production per origin

The estimated certified production volume in Latin America showed the strongest growth (+19%), reflected by a growth in all countries.

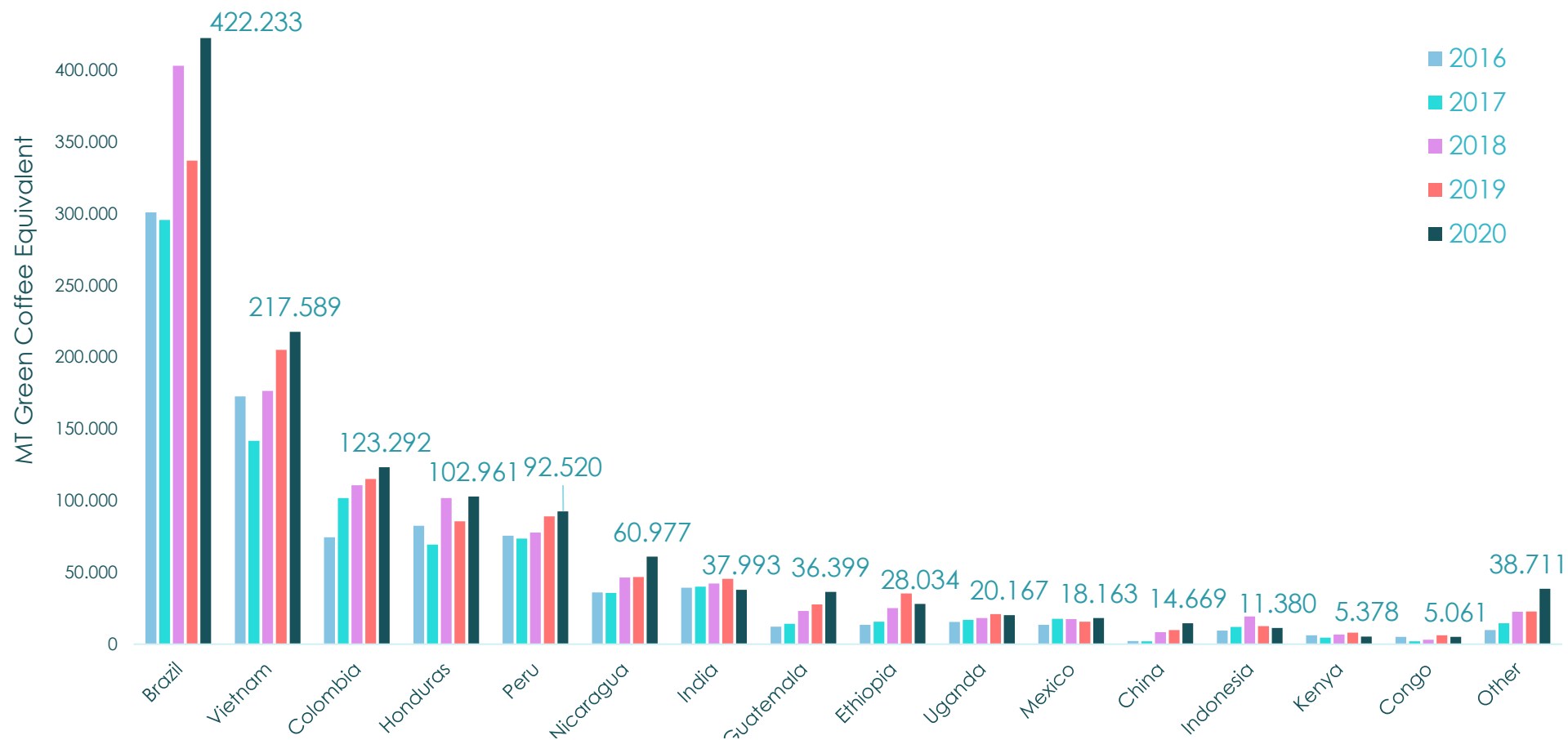
Volumes in Asia Pacific increased by 7%, led by Vietnam, Laos, and China, triggered by both demand and farming practices.

Africa (-9%) saw drop in most countries, except in Rwanda and Tanzania which can be explained by the (re)entry of large farmer groups and liberation of policies in Tanzania.

Coffee Certification Data Report 2020
UTZ program



Estimated production per origin



The top 3 producing countries remain the same as last year: Brazil (34% of the global production), Vietnam (18%), and Colombia (10%).

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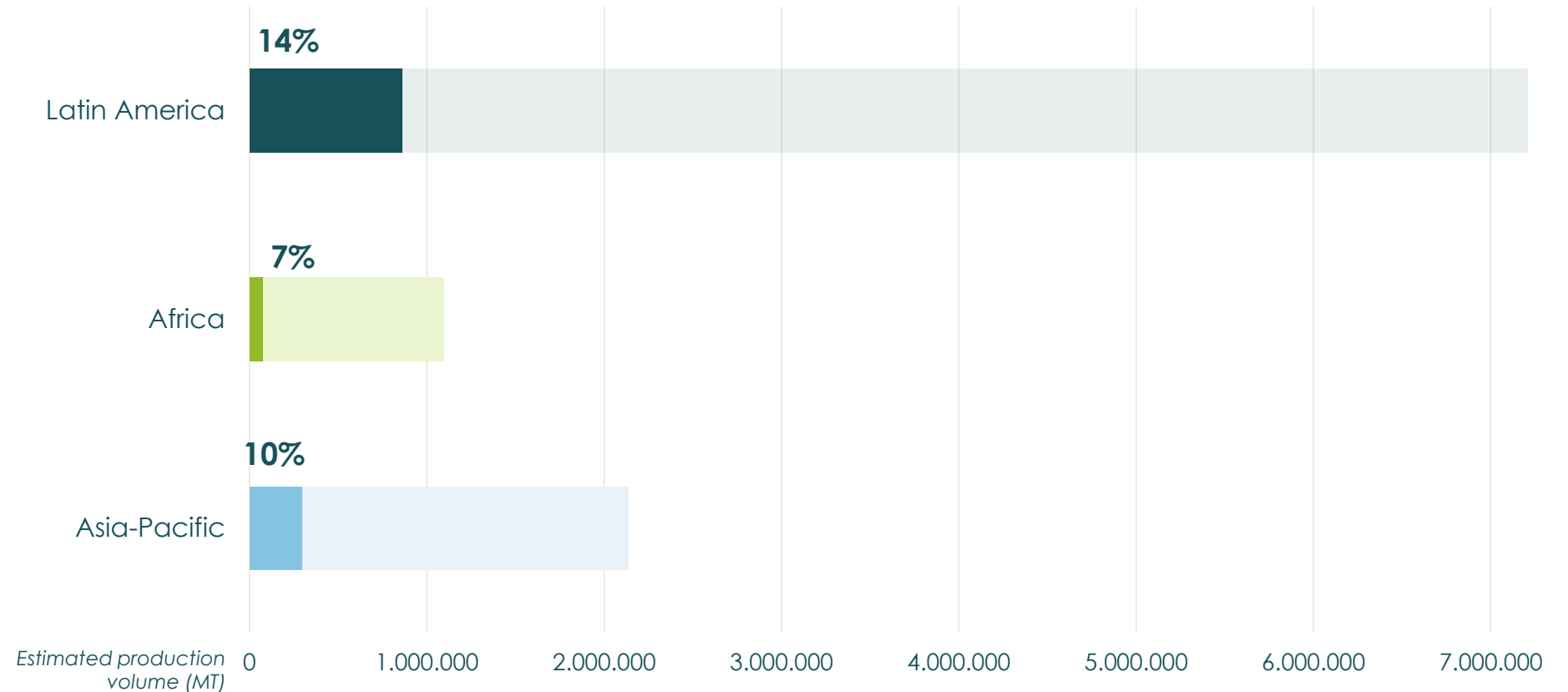
Estimated production is based on information from certificates valid on December 31, 2020 and those under review where a positive certification decision is expected.

In 2020, of all coffee produced globally 12% was UTZ certified.

On regional level, certified coffee from Latin America had the highest production market share.

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Production market share per region



UTZ certified estimated coffee production vs. regional estimated production (Source [ICO](#)).

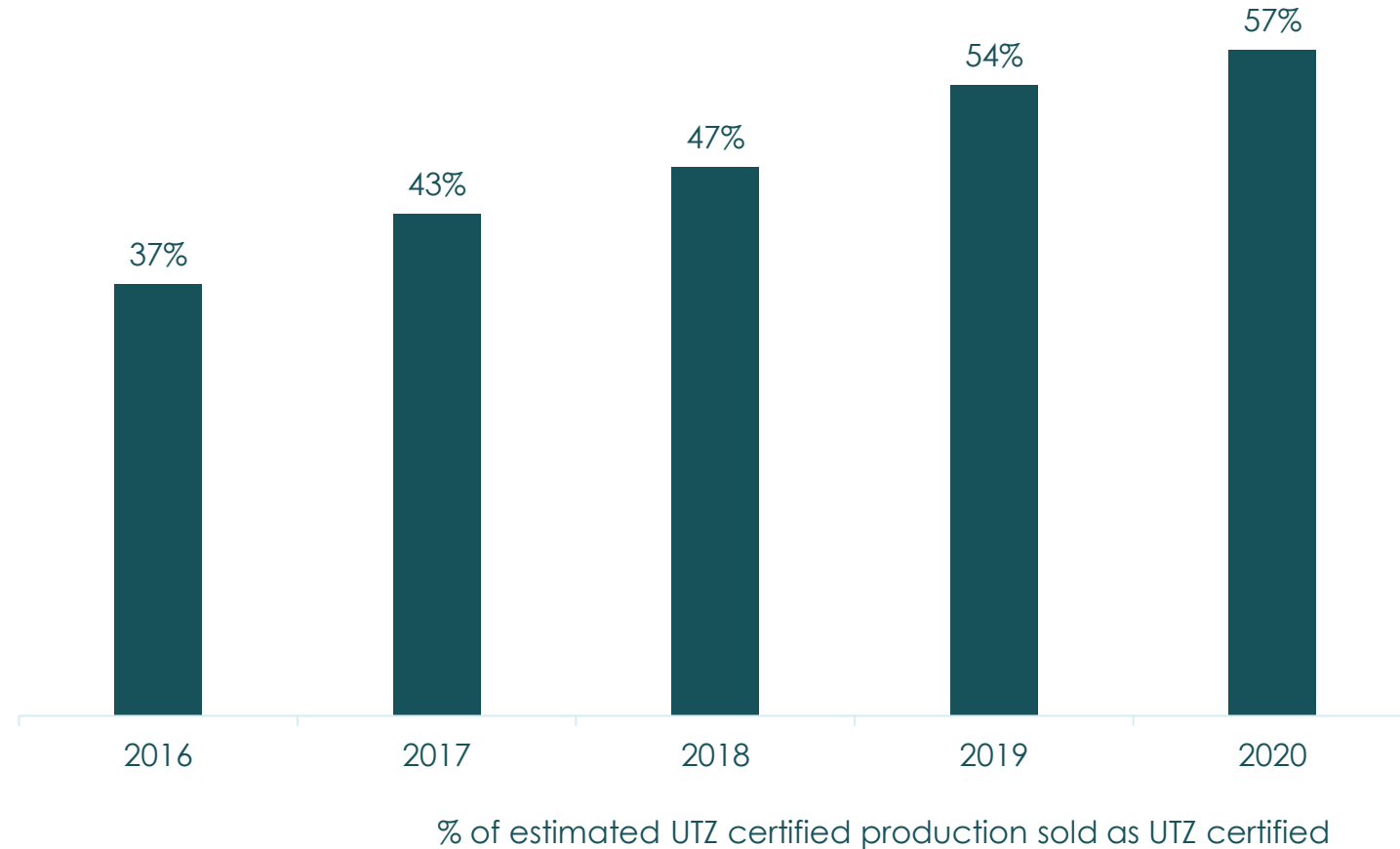
Supply and Demand ratio

Supply – Demand ratio

Producers sold on average 57% of their estimated certified volume as UTZ.

The share of certified volume sold in relation to certified supply continued to increase globally.

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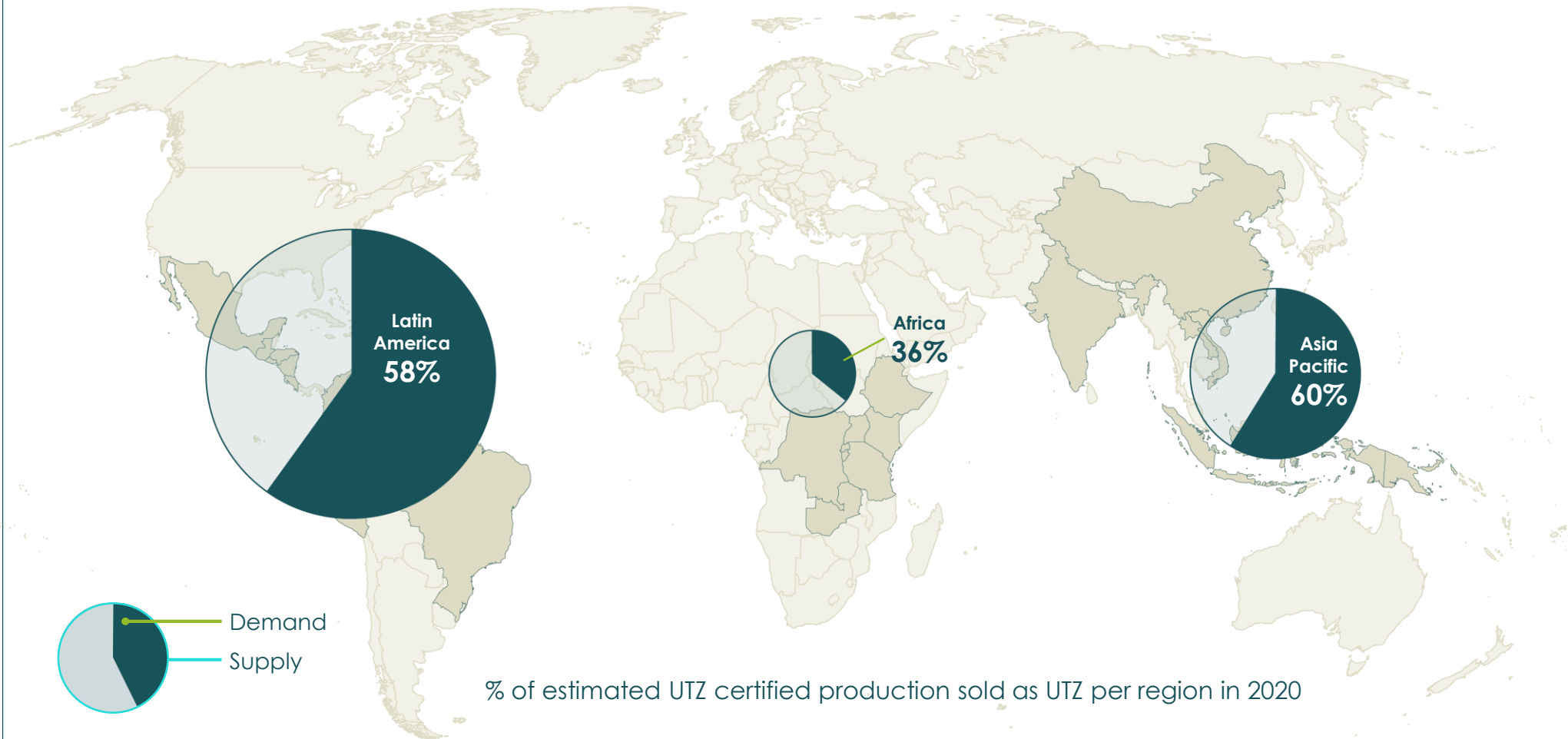
This is based on confirmed producer sales and estimated production on December 31, 2020. It indicates an estimation, not an absolute number.

Supply – Demand per region

The global supply and demand ratio for the UTZ coffee program increased by 6% vs. 2019.

Asia Pacific has the highest share of certified sales with 60% of certified production sold as UTZ.

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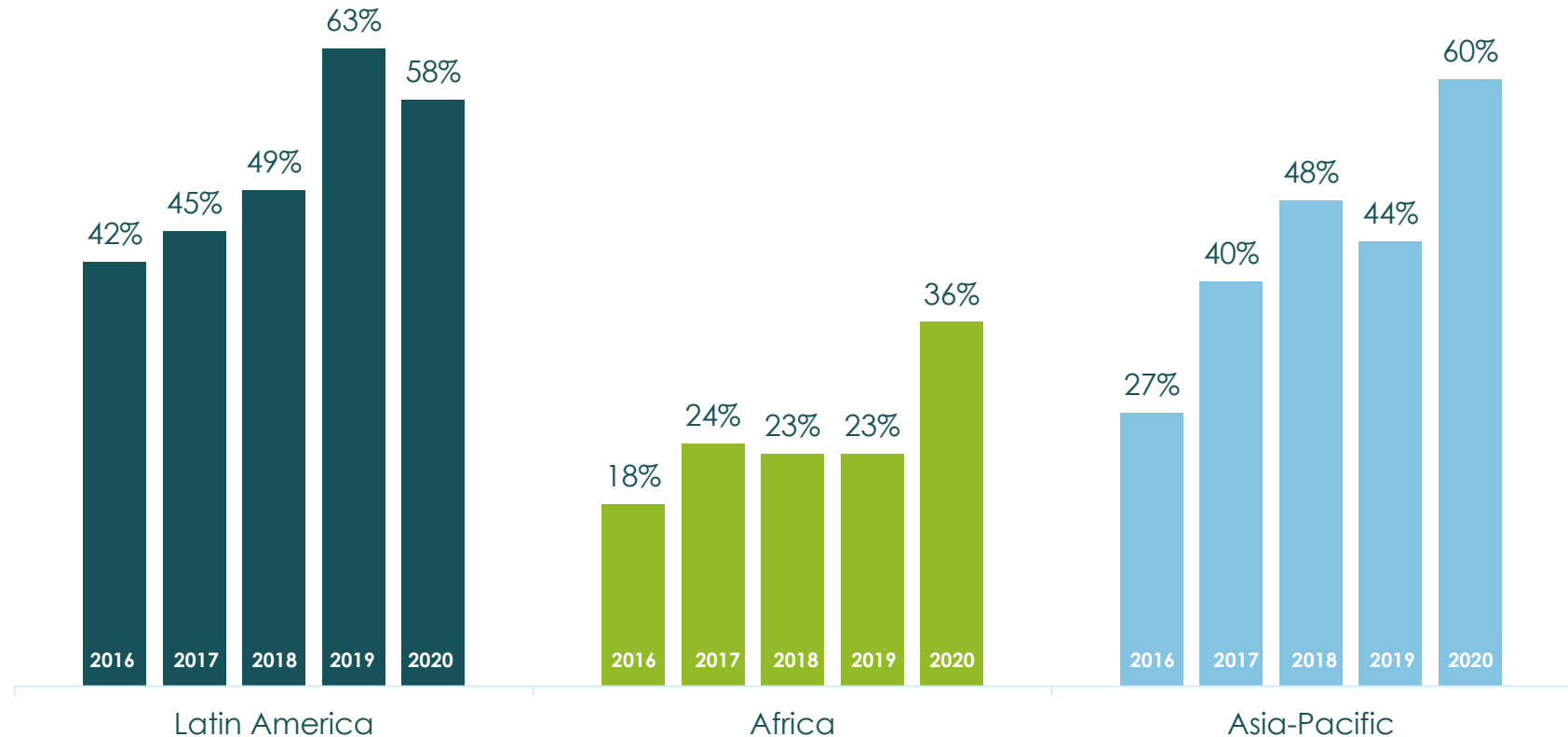


This is based on confirmed producer sales and estimated production on December 31, 2020. It indicates an estimation, not an absolute number.

Supply – Demand per region

The continued global increase in supply and demand ratio is shown for Africa and Asia Pacific. The increases are due to higher demand for certified coffee resulting in higher sales.

In Latin America the supply and demand ratio decreased for the first time in years. This can be explained by a higher increase of certified production (+19%) than sales (+12%), mainly driven by Brazil and Nicaragua.



% 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



52%

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

29% Rainforest Alliance

12% Fairtrade

19% Organic

12% 4C

Double-certification UTZ and Rainforest Alliance is the predominant combination with 60%.

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Multi-certified represents the number of UTZ coffee producer groups and individual farms that were also certified for one or more of the following schemes: Rainforest Alliance, Fairtrade, Organic, and 4C. Other schemes are excluded from the total Multi-certification figures.

Certification data

Estimated production (MT)

Country	2018	2019	2020
Global	1,102,826	1,083,649	1,235,526
Brazil	402,936	336,815	422,233
Burundi	4,270	2,464	1,950
China	8,435	9,917	14,669
Colombia	110,782	115,178	123,292
DR Congo	3,062	6,297	5,061
Ethiopia	25,232	35,431	28,034
Guatemala	23,225	27,684	36,399
Honduras	101,828	85,577	102,961
India	42,241	45,632	37,993
Indonesia	19,337	12,635	11,380
Kenya	6,741	7,976	5,378
Laos	2,484	5,111	13,398
Mexico	17,512	15,742	18,163
Nicaragua	46,439	46,812	60,977
Peru	77,773	89,122	92,520
Rwanda	2,761	3,276	4,978
Tanzania	3,451	3,558	7,618
Uganda	18,306	21,050	20,167
Vietnam	176,406	205,046	217,589
Other*	8,410	8,328	10,766

*Other countries are Costa Rica, El Salvador, Papua New Guinea and Zambia

Global sales (MT)

Country	2018	2019	2020
Global	518,807	589,522	708,579
Brazil	208,225	256,321	276,735
Burundi	1,302	2,071	1,822
China	1,623	8,100	6,868
Colombia	43,437	54,992	80,160
DR Congo	1,293	1,255	3,233
Ethiopia	2,925	6,537	6,649
Guatemala	9,298	12,694	12,381
Honduras	75,314	75,350	85,374
India	13,177	14,774	18,875
Indonesia	8,944	6,166	4,917
Kenya	1,313	1,939	3,110
Laos	60	945	5,659
Mexico	5,196	2,816	3,697
Nicaragua	17,683	22,922	15,793
Peru	22,328	20,388	27,742
Rwanda	874	2,000	2,062
Tanzania	1,534	1,093	1,110
Uganda	5,211	4,813	8,321
Vietnam	94,156	90,739	139,173
Other*	4,915	3,605	4,898

*Other countries are Costa Rica, Papua New Guinea and Zambia

Number of farmers

	2018	2019	2020
Global	283,487	309,048	326,726
Africa	164,245	190,290	181,519
Asia / Pacific	55,653	54,932	71,763
Latin America	63,589	63,826	73,444

Number of workers (permanent & seasonal)

	2018	2019	2020
Global	193,158	201,779	183,834
Africa	56,148	55,864	54,982
Asia / Pacific	60,397	44,183	42,493
Latin America	76,613	101,732	86,359

Area (Hectare)

	2018	2019	2020
Global	770,423	720,250	772,882
Africa	131,296	122,711	141,707
Asia / Pacific	139,384	145,498	136,357
Latin America	499,743	452,041	494,818



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