Tea Certification Data Report 2021

Rainforest Alliance & UTZ programs

May 2021

Introduction

This report presents the scope and scale of the Rainforest Alliance 2017 and UTZ tea certification programs in calendar year 2021, as part of our commitment to transparency.

The report focuses on 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.

It considers farm certificate holders with an active license/certificate valid as of 31 December 2021, as well as those who have registered for the Rainforest Alliance Certification Program based on the 2020 Sustainable Agriculture Standard. When necessary, we confirmed re-certification or registration status in the new certification program with Certification Bodies.

* While the ongoing transition to the new certification program, including the rollout of the new standard and the traceability system, as well as the situation on the ground in light of Covid-19 have posed challenges for our data gathering, the data in this report is strongly representative and accurate for our UTZ and Rainforest Alliance 2017 programs. The data is gathered from our traceability platforms, MultiTrace for UTZ, and Marketplace for the Rainforest Alliance.

Please note, this reports covers the certification data of 'regular' tea (*Camellia sinensis*). If you are interested in the 2021 data for UTZ certified rooibos or herbal teas get in touch with your Rainforest Alliance contact.

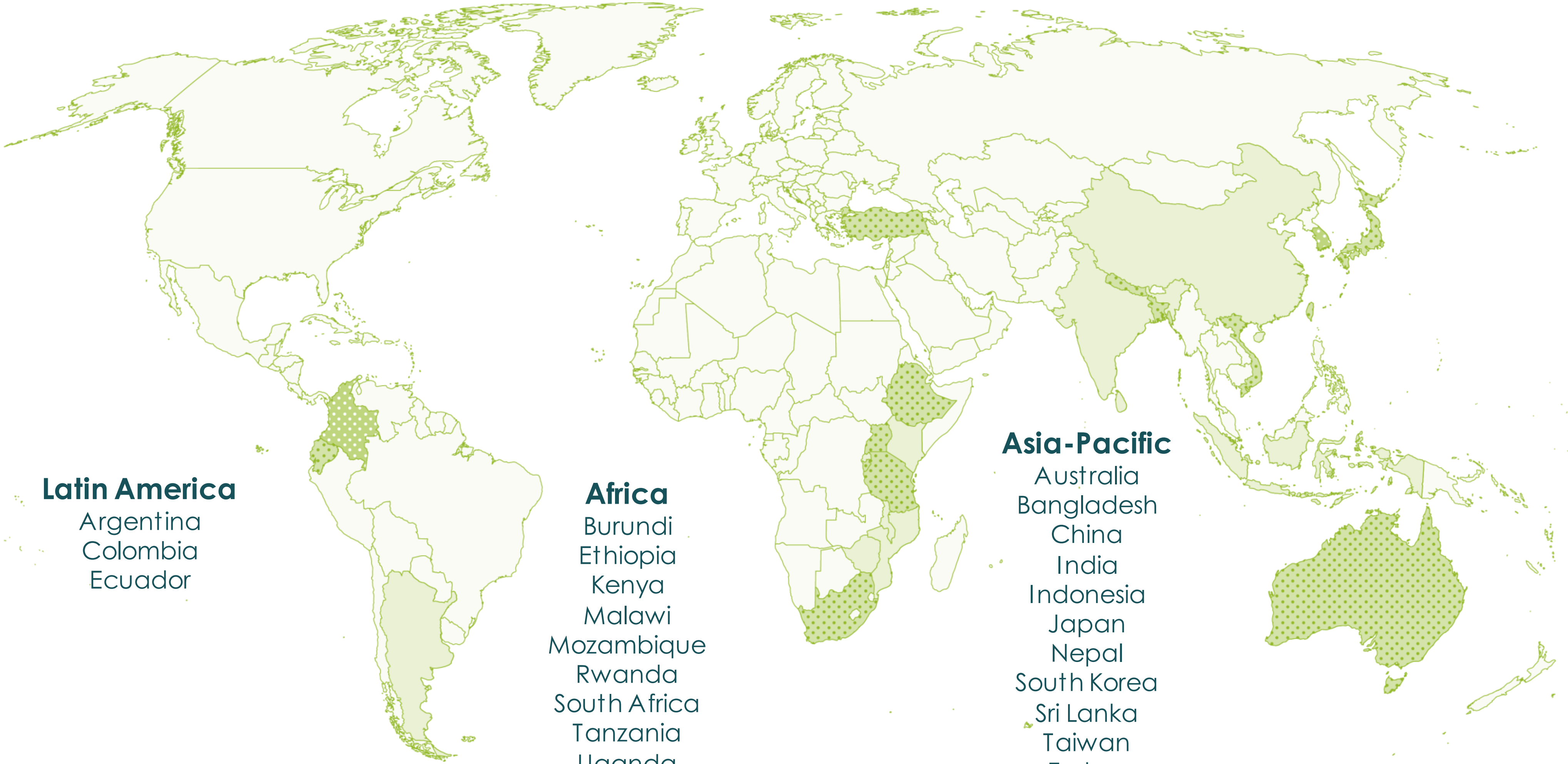
Summary

In 2021, the tea sector continued to feel the impact of the COVID pandemic and its social and economic consequences. For example, many exporters and importers faced challenges around container availability, shipping costs, or maintaining inventories. And on the consumer side, demand for in-home tea from retailers grew, but out-of-home tea consumption continued to shrink because of restrictions on gatherings and movement. On the origin side, many tea farmers also had to contend with rising input costs and in some origins also we observe big shifts related to the availability of workers, linked to economic migration and the shift to mechanical harvesting.

Nevertheless, the total Rainforest Alliance tea program grew across most of our indicators, with an increase in area planted with certified tea to nearly 700,000 hectares, and now nearly 530 producers in the program. We also noted an increase in the number of farmers in the tea program, which now total over 1 million. In stark contrast the number of workers presented a marked decline, particularly due to the challenges on hiring workers and migrant workers as a result of travel restrictions and related risks.

The UTZ tea program continued to shrink, linked to the transition to the Rainforest Alliance program. Within that, we note that although production volumes are up in aggregate, there were notable decreases in production in Malawi, Indonesia and Turkey.

Geographical program reach



Latin America
Argentina
Colombia
Ecuador

Africa
Burundi
Ethiopia
Kenya
Malawi
Mozambique
Rwanda
South Africa
Tanzania
Uganda
Zimbabwe

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

In 2021, the Rainforest Alliance and UTZ tea programs reached farmers and workers in 25 countries worldwide.

Program reach: Rainforest Alliance and UTZ

708 K +

Area (hectare)

Combined estimated production area

1+ Million

Number of farmers

Combined number of farmers

Combined figures are calculated by subtracting the figures of dual certified producer groups and individual farms from the total of UTZ and Rainforest Alliance.

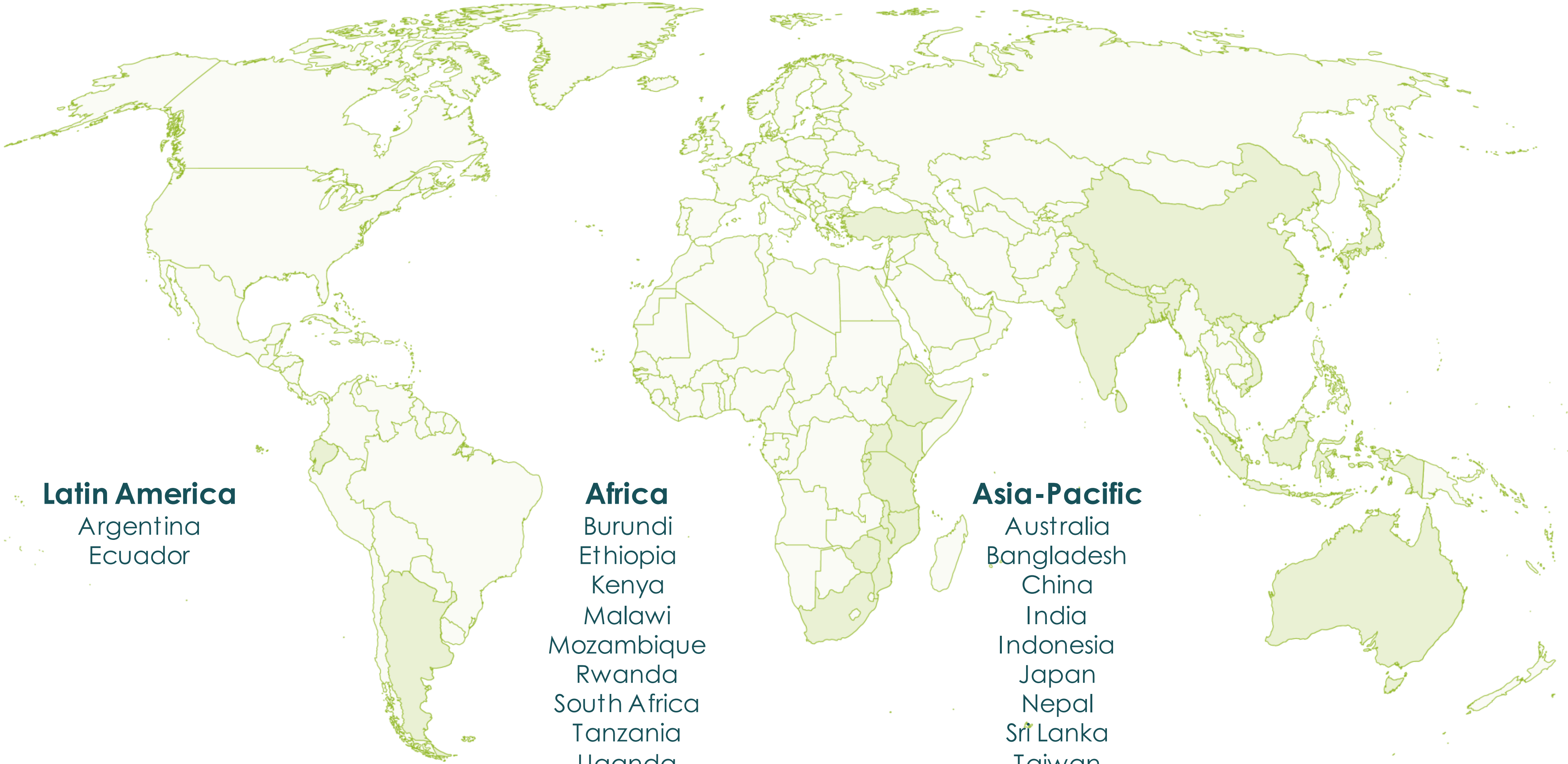
Tea Certification Data Report 2021

- Rainforest Alliance program
- UTZ program

Rainforest Alliance
Tea program

Program reach

Geographical reach



Latin America
Argentina
Ecuador

Africa
Burundi
Ethiopia
Kenya
Malawi
Mozambique
Rwanda
South Africa
Tanzania
Uganda
Zimbabwe

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

In 2021, there were Rainforest Alliance certificate holders in 23 countries.

Program reach

701,781

Relative growth 2020-2021: **+9%**

Area (hectare)

1,072,574

Relative growth 2020-2021: **+12%**

Number of farmers

1,388,581

Relative growth 2020-2021: **+7%**

Estimated production (MT)

664,793

Relative growth 2020-2021: **-9%**

Number of workers (seasonal and permanent)

Program reach

In 2021, the estimated production area increased by 9% compared to 2020. Again, Africa and Asia Pacific were the biggest contributors to the growth, with noticeable increases seen in Mozambique (+163%) and Nepal (+145%).

Area (hectare)

Click to add text

The number of producers globally increased by 12% from 2020 to 2021, with the main increase in Nepal (from 1300 to over 3,000 producers). The three countries with the most farmers are Kenya (820k +), Sri Lanka (65k+) and Burundi (50k+).

Number of farmers

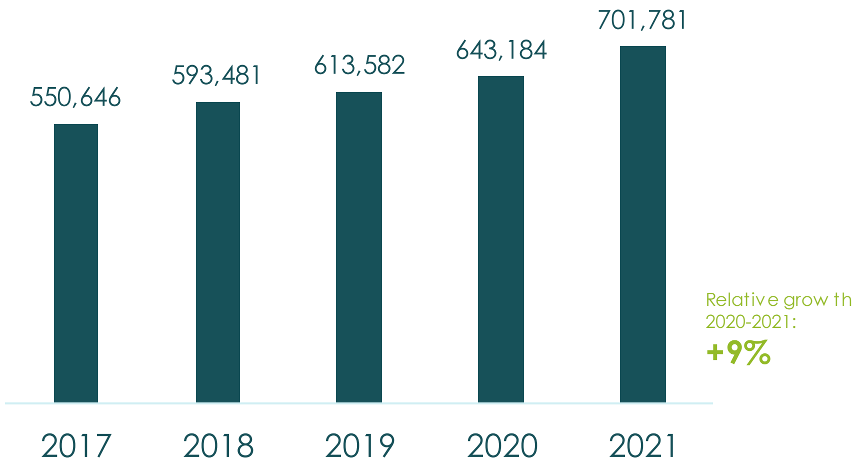
In 2021, the estimated certified volume increased by 7% compared to last year. Noticeable increases are seen in Nepal (+166%), Mozambique (+80%), and Tanzania (+46%). *The top 3 producing countries remained the same: Kenya, India, and Sri Lanka.*

Estimated production (MT)

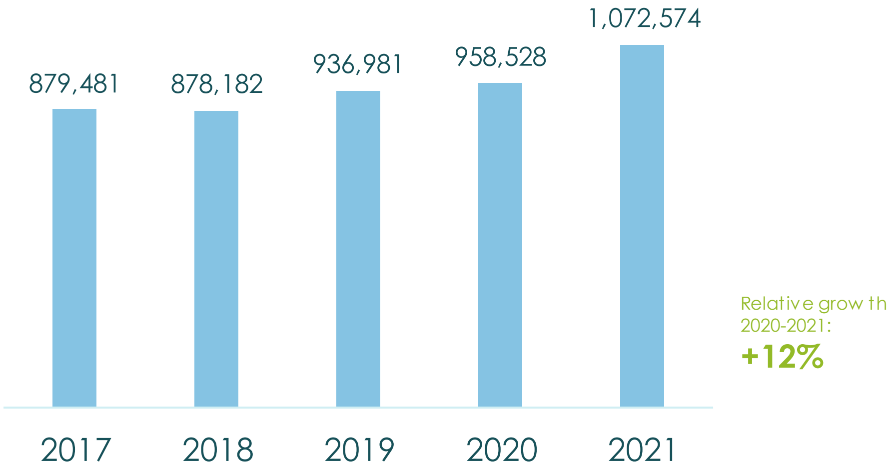
In 2021, the number of workers went down by 9%, while the other production indicators went up. This can be attributed to more mechanized tea harvesting and COVID-19 restrictions on movement and border closures which affected employment of seasonal workers.

Number of workers (seasonal and permanent)

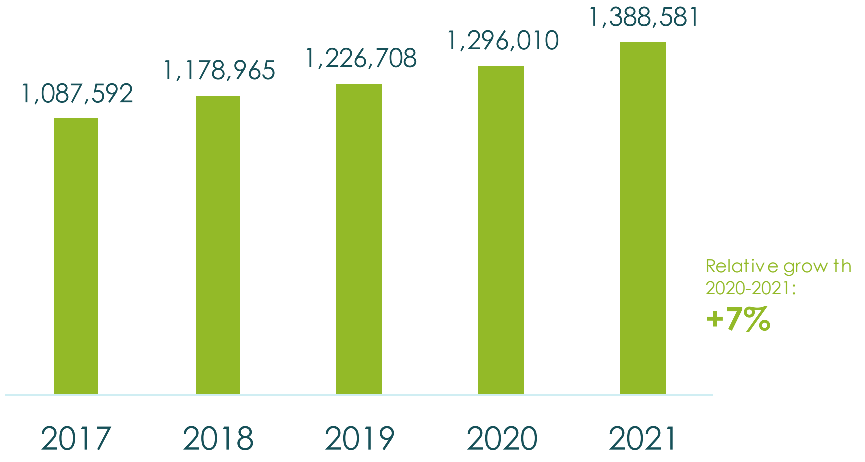
Program reach



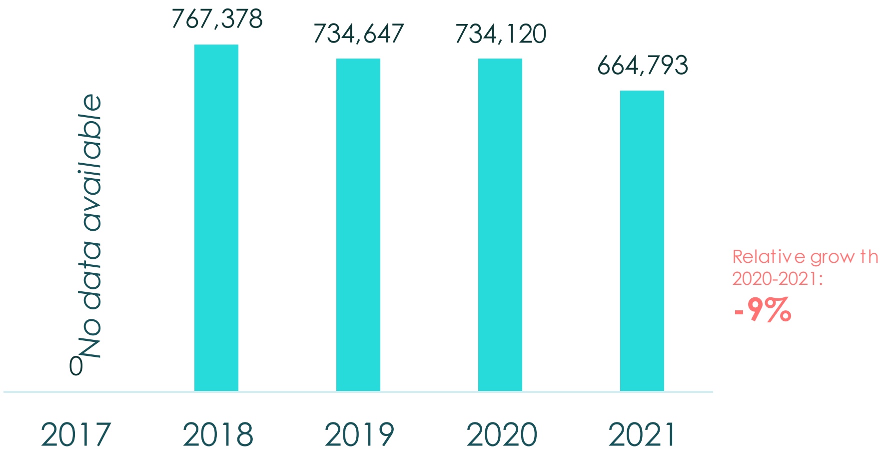
Area (ha)



Number of farmers



Estimated production (MT)



Number of workers (seasonal and permanent)

Global sales

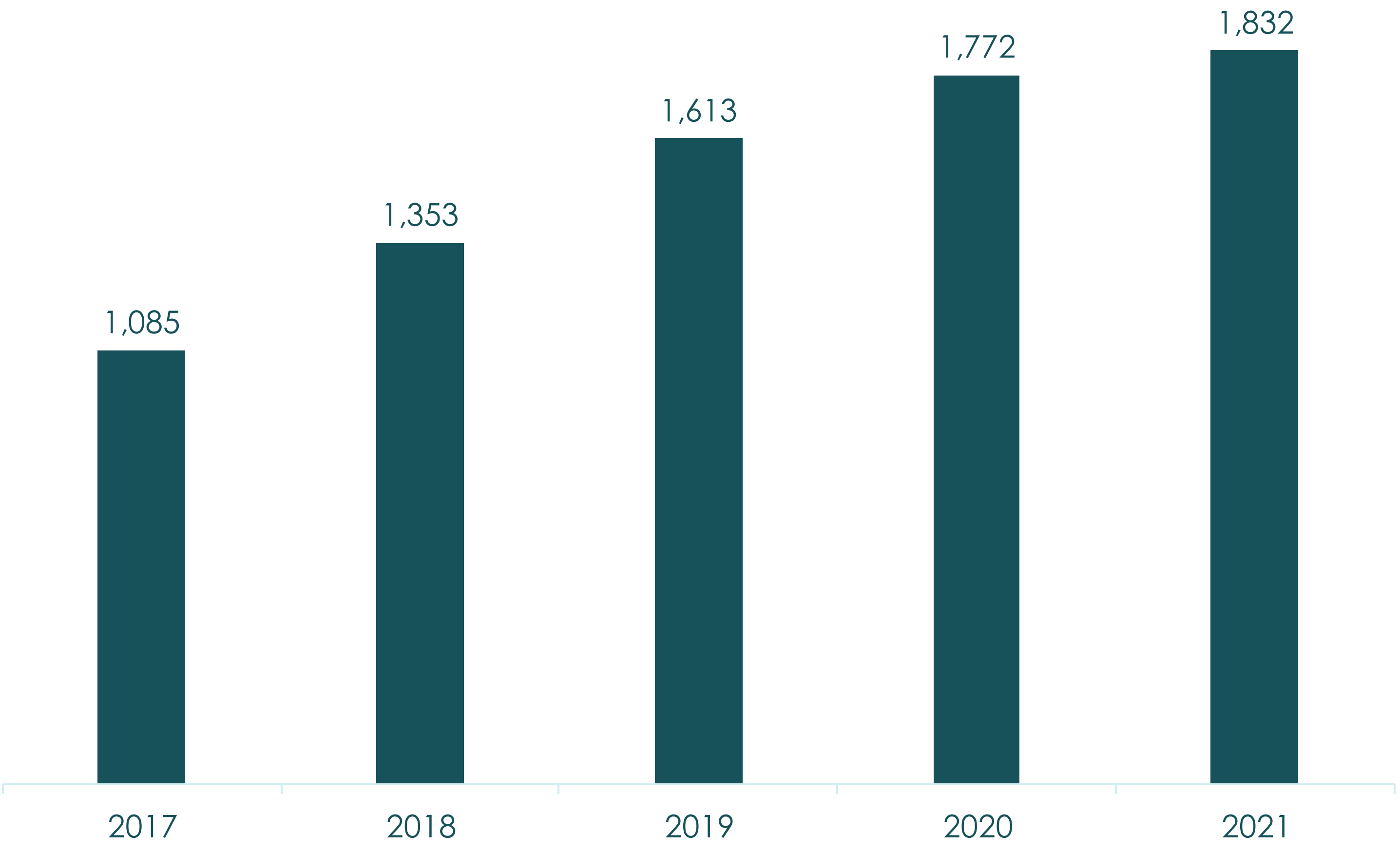
Global Sales

2021 Global Sales figures are not available due to traceability system migration.

For historical Global Sales data please refer to the 2020 Certification Data Report.

Registered supply chain actors

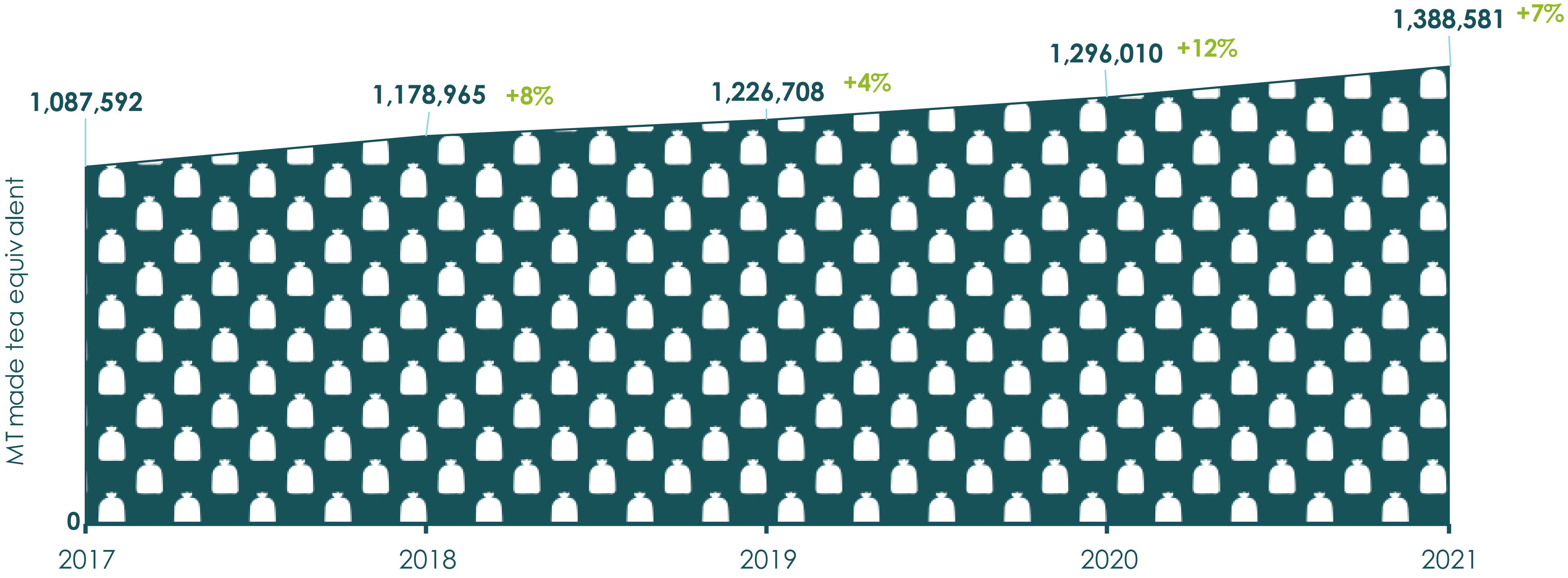
In 2021, the number of supply chain actors reached 1,832, a 3% increase. This increase was led by Asia, where there are now 819 supply chain actors, followed by Europe (576), and North America (279)
The countries with the most registered supply chain actors are Sri Lanka (287), the United States of America (237) and India (171).



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

Estimated Production

Global estimated tea production

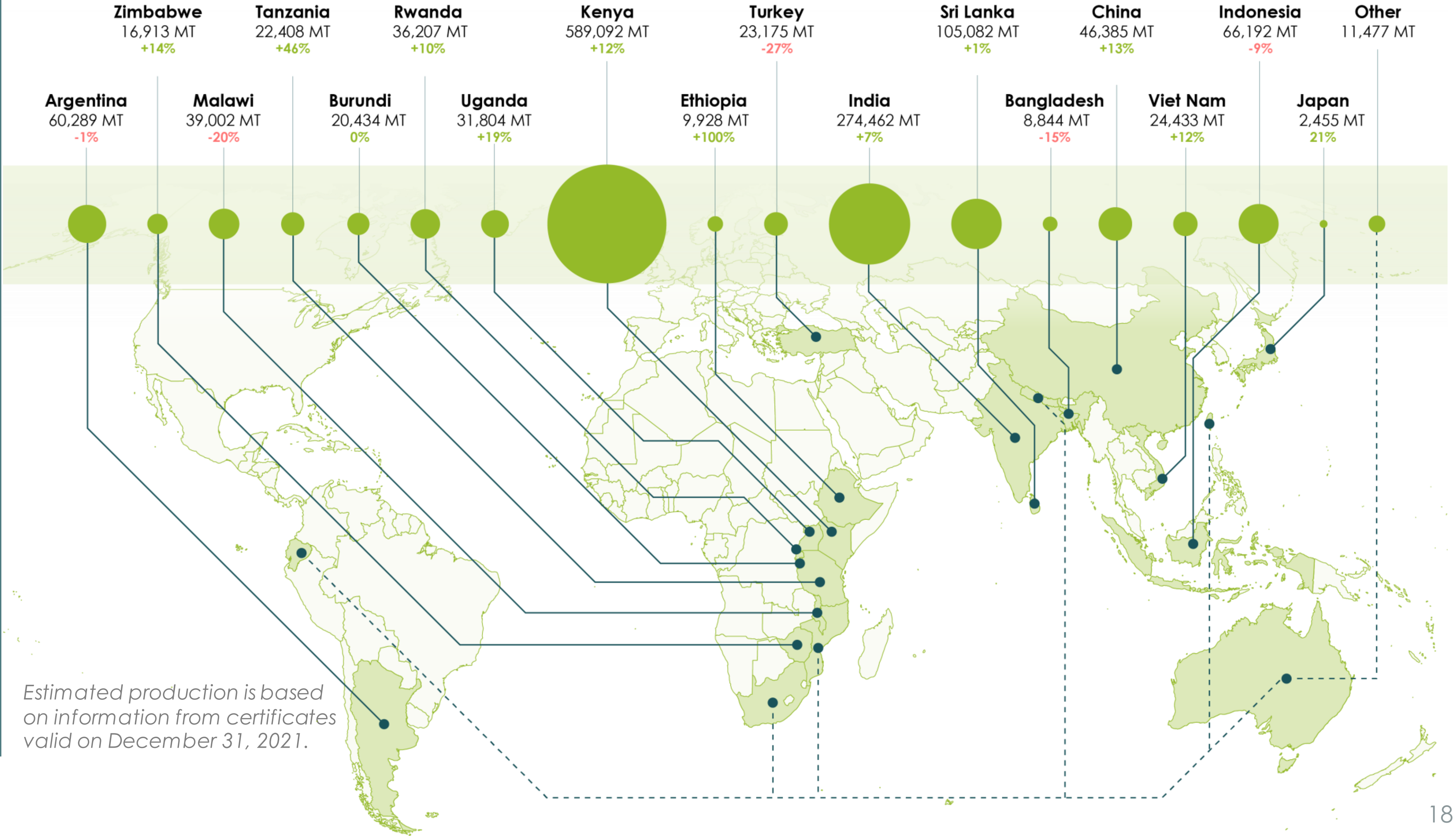


Estimated production is based on information from certificates valid on December 31, 2021.

Globally the certified production in the RA program increased by 7%, with Africa leading with a 12% increase.

Tea Certification Data Report 2021
Rainforest Alliance program

Estimated production per origin



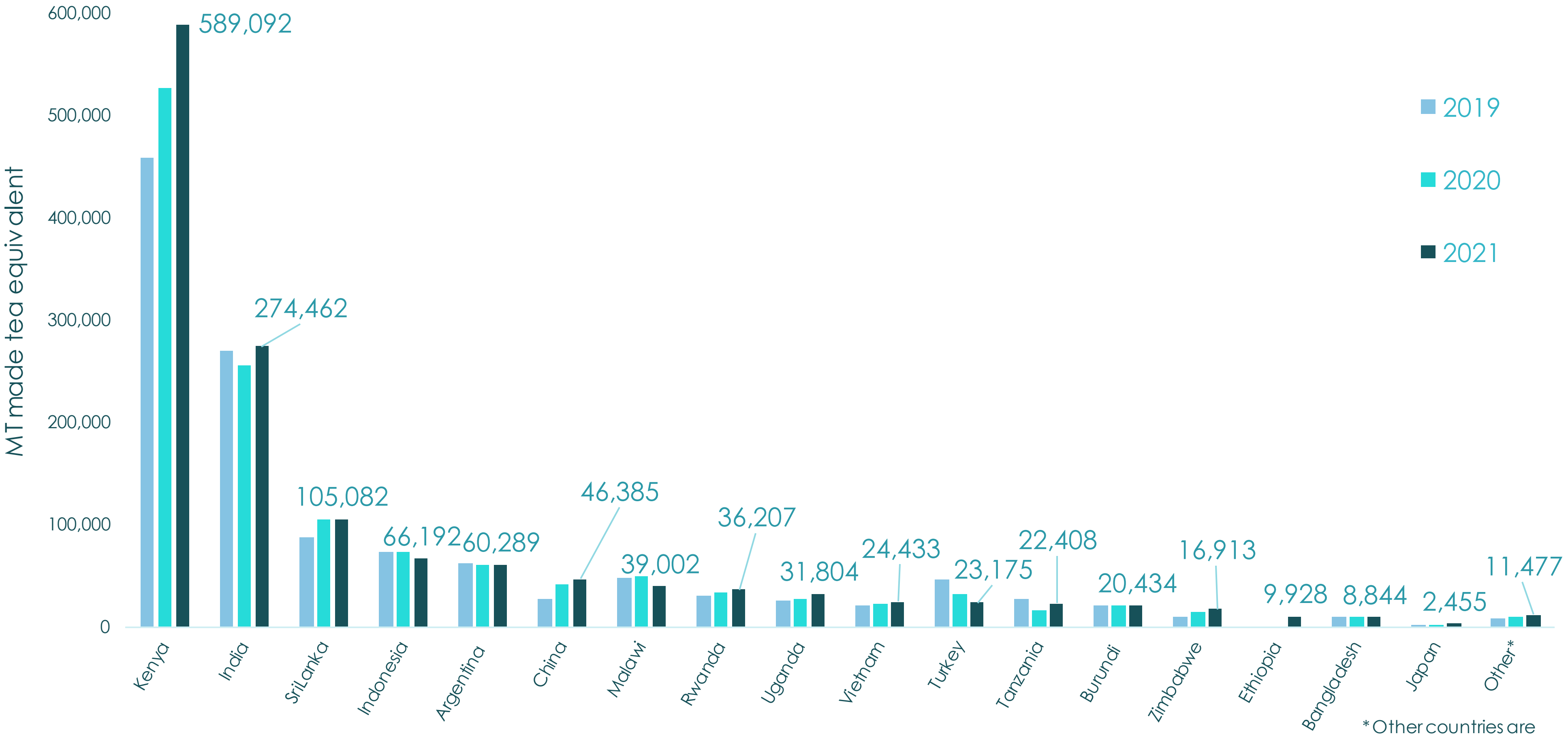
Estimated production is based on information from certificates valid on December 31, 2021.

In 2021, there was a global increase in estimated production in Africa (+12%) and Asia Pacific (+2%), while estimated production Latin America dropped by 1%.

Estimated production per origin

As in 2020, Kenya, India and Sri Lanka remained the top three producing countries.

Noticeable increases were seen in Nepal (+166%), Mozambique (+80%), and Tanzania (+46%) with decreasing certified volume in Turkey (-27%).

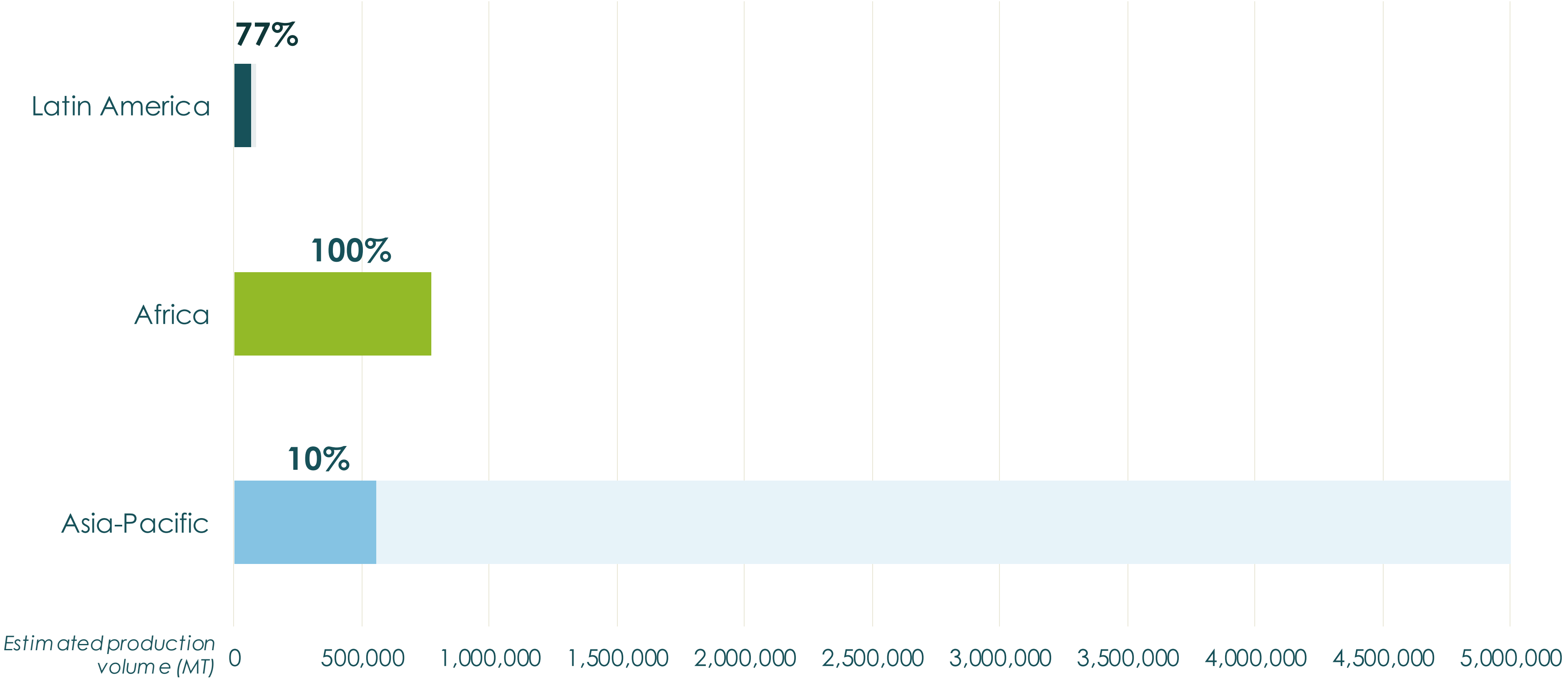


*Other countries are Australia, Ecuador, Mozambique, Nepal, South Africa, and Taiwan

Estimated production is based on information from certificates valid on December 31, 2021.

Tea Certification Data Report 2021
Rainforest Alliance program

Production market share per region



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

In 2021, of all tea produced globally 22% was Rainforest Alliance certified.

Tea Certification Data Report 2021
Rainforest Alliance program

Multi-certification

Multi-certification

27%

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

10% UTZ

14% Organic

12% Fairtrade

The most common combination of programs is Organic, followed closely by Fairtrade.

Tea Certification Data Report 2021
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

RAINFOREST ALLIANCE

Estimated production (MT)

Country	2019	2020	2021
Global	1,226,708	1,296,010	1,388,581
Argentina	61,894	60,842	60,289
Australia	1,528	1,528	1,124
Bangladesh	10,371	10,371	8,844
Brazil	502	-	-
Burundi	20,434	20,434	20,434
China	27,289	40,885	46,385
Ecuador	3,735	3,233	3,027
Ethiopia	-	-	9,928
India	269,266	256,144	274,462
Indonesia	72,962	72,696	66,192
Japan	2,371	2,022	2,455
Kenya	458,853	527,287	589,092
Malawi	47,180	48,906	39,002
Mozambique	2,000	2,000	3,600
Nepal	1,130	1,015	2,697
Rwanda	30,698	32,940	36,207
South Africa	-	-	750
SriLanka	87,173	104,063	105,082
Taiwan	331	1,264	279
Tanzania	26,916	15,298	22,408
Turkey	45,887	31,679	23,175
Uganda	24,835	26,722	31,804
Vietnam	21,312	21,867	24,433
Zimbabwe	10,039	14,814	16,913

Global sales (MT)

Country	2019	2020	2021
Global	369,344	375,283	NO DATA AVAILABLE
Kenya	116,270	118,321	
Argentina	44,202	60,982	
Malawi	20,092	39,372	
India	54,214	33,607	
Indonesia	39,236	24,365	
Sri Lanka	11,572	21,524	
Turkey	18,488	14,592	
China	14,708	13,106	
Viet nam	14,550	11,143	
Zimbabwe	5,024	11,025	
Rwanda	15,056	10,699	
Tanzania	7,710	10,129	
Uganda	4,410	2,715	
Burundi	91	60	
Nepal		45	
Brazil	318	22	
Other*	3,403	3,576	

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

Number of farmers

	2019	2020	2021
Global	936,981	958,528	1,072,574
Africa	844,065	842,253	942,146
Asia / Pacific	92,216	115,488	129,413
Latin America	700	787	1,015

Number of workers (permanent & seasonal)

	2019	2020	2021
Global	734,647	734,120	664,793
Africa	182,395	162,452	156,283
Asia / Pacific	550,980	570,481	507,415
Latin America	1,272	1,187	1,095

Area (Hectare)

	2019	2020	2021
Global	613,582	643,184	701,781
Africa	304,525	318,862	371,159
Asia / Pacific	291,818	305,725	311,368
Latin America	17,238	18,597	19,254

UTZ Tea program

Program reach

Geographical reach

With producers in Argentina and Colombia rejoining the program, and producers in Vietnam dropping out, the number of countries with UTZ certified tea producers went up from 11 in 2020 to 12 in 2021.

Tea Certification Data Report 2020
UTZ program

Program reach

46,348

Relative growth 2020-2021: **-17%**

Area (hectare)

15,815

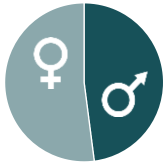
Relative growth 2019-2021: **+7%**

Number of farmers

94,199

Relative growth 2020-2021: **-6%**

Estimated production (MT)



46,796

Relative growth 2020-2021: **-19%**

Number of workers (seasonal and permanent)

Program reach

In 2021, the estimated production area dropped by 17% compared to 2020. The most significant drop was in Asia Pacific (27%) with Sri Lanka dropping by 82%, and China by 18%.

Area (hectare)

In 2021, the number of farmers increased by 7% compared to 2019. This growth was driven by increases in Kenya, where the largest number of farmers is also found (9.5k+).

Number of farmers

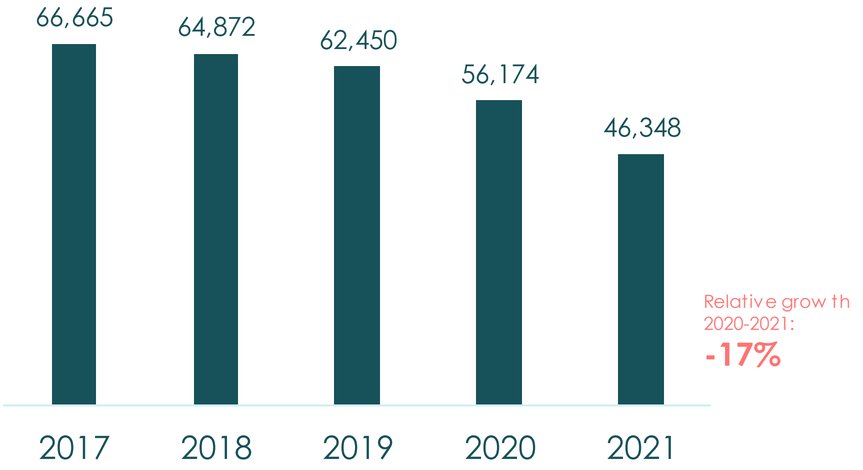
In 2021, the estimated certified volume decreased by 6% compared to 2020. This decrease is seen across all regions, with large drops observed in Indonesia (-70%) and Malawi (-50%). The top 3 producing countries remain India, Kenya, and China.

Estimated production (MT)

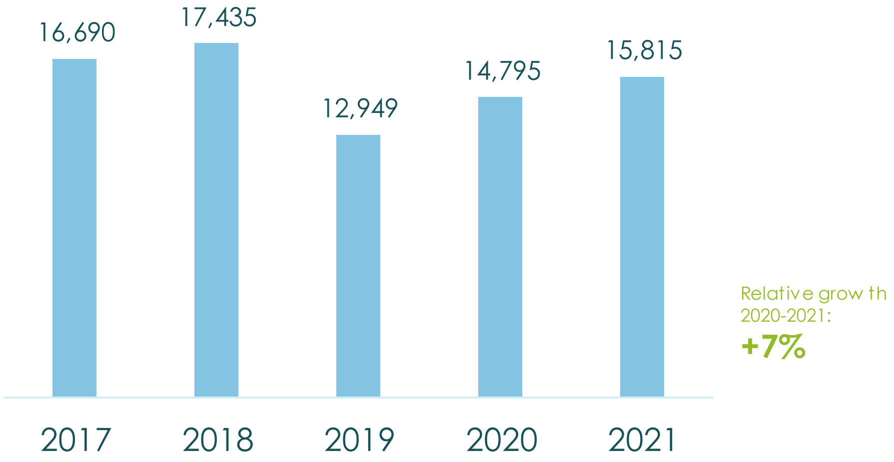
In 2021, the number of workers went down by 19% globally with the highest drop in the Asia Pacific region (-20%) followed by Africa (-18%). This is in line with the other production indicators going down. Continued mechanization in tea production and COVID-19 restrictions may also have played a role.

Number of workers (seasonal and permanent)

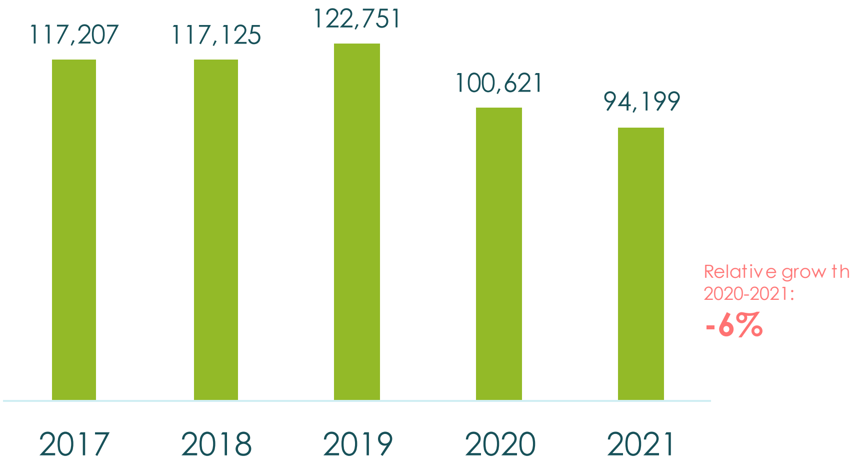
Program reach



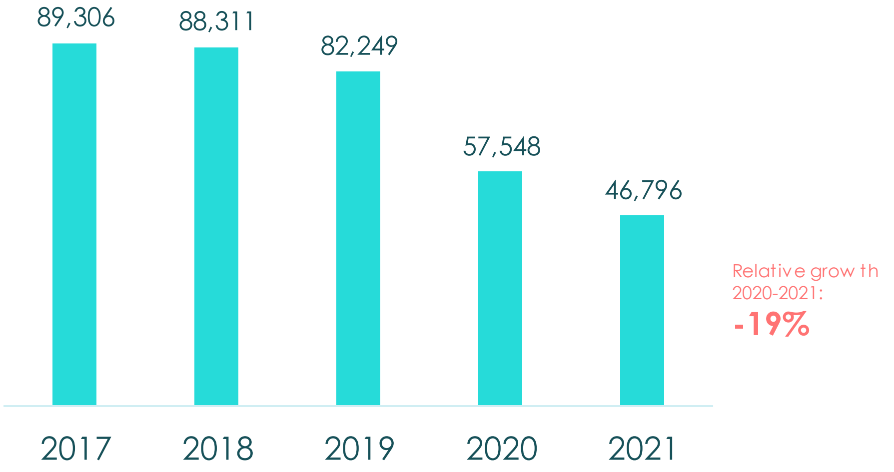
Area (ha)



Number of farmers



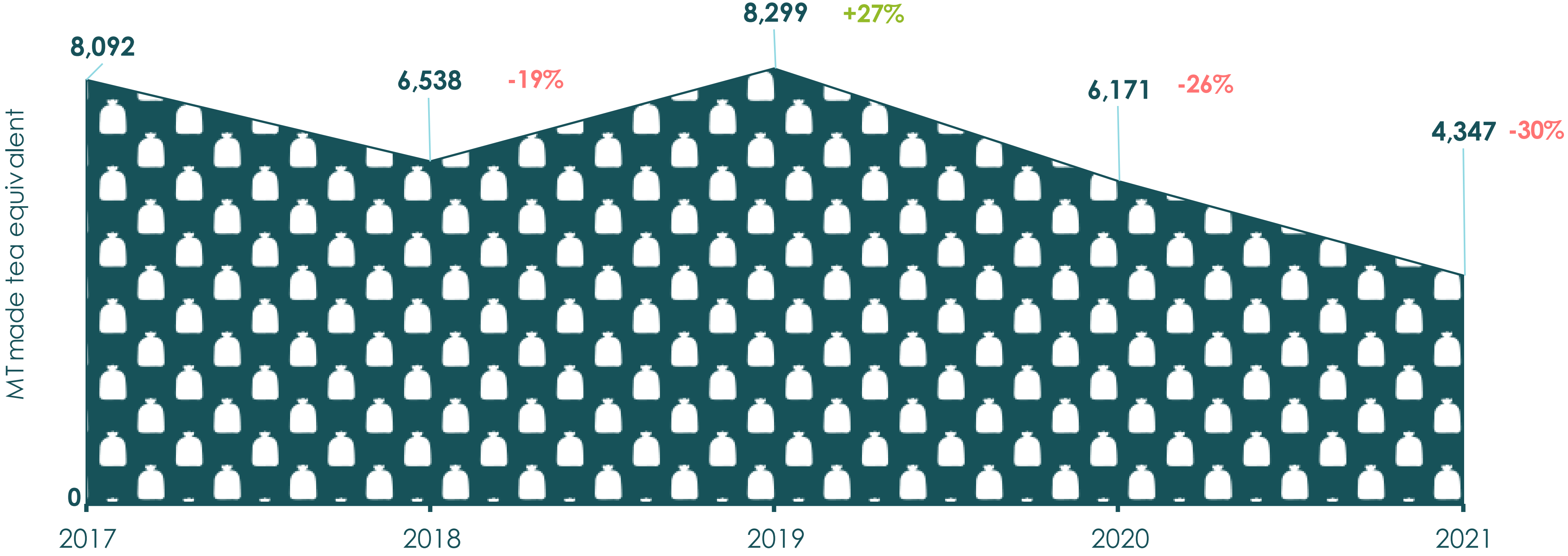
Estimated production (MT)



Number of workers (seasonal and permanent)

Global sales

Global tea sales

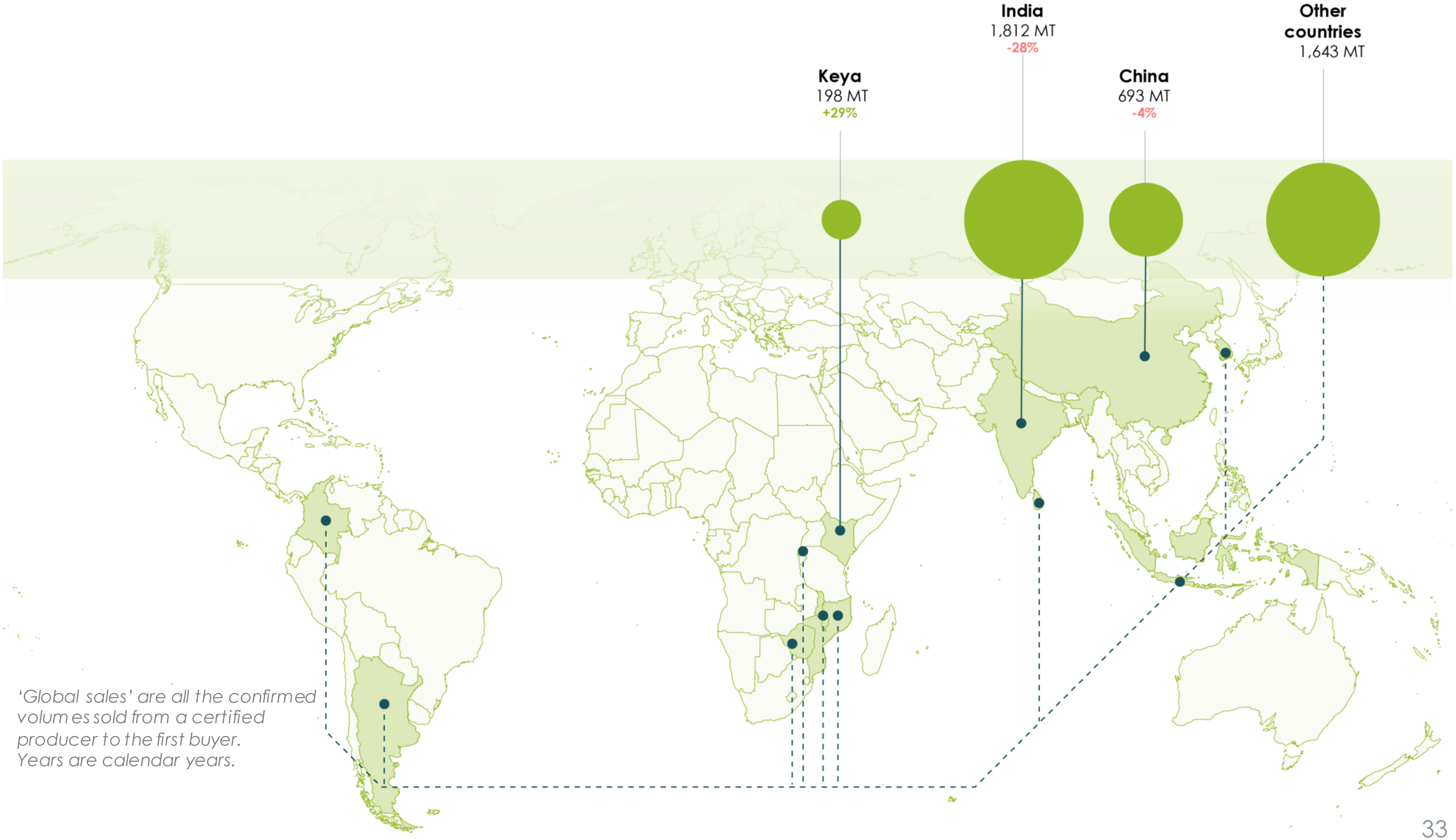


'Global sales' are all the confirmed volumes sold from a certified producer to the first buyer. Years are calendar years.

Globally, global producer sales decreased by 30% in the UTZ program (from 6k+ MT in 2020 to 4k+ MT in 2021).

Tea Certification Data Report 2021
UTZ program

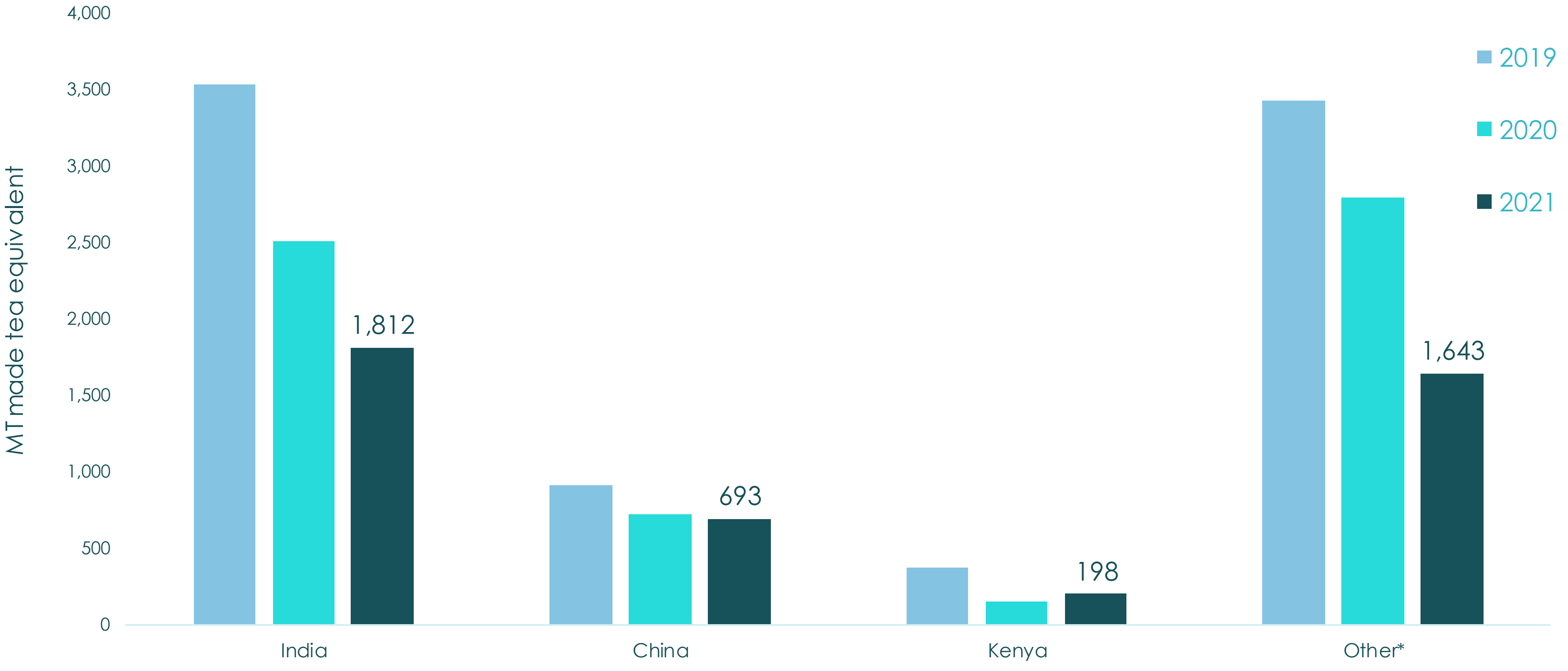
Global sales per origin



There was a global drop in sales in the UTZ program, with significant levels seen in Rwanda (-89%) and Sri Lanka (-87%).
The top three producers' sales come from India (1.8k+ MT), China (693 MT), and Malawi (680 MT)

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

Global sales per origin

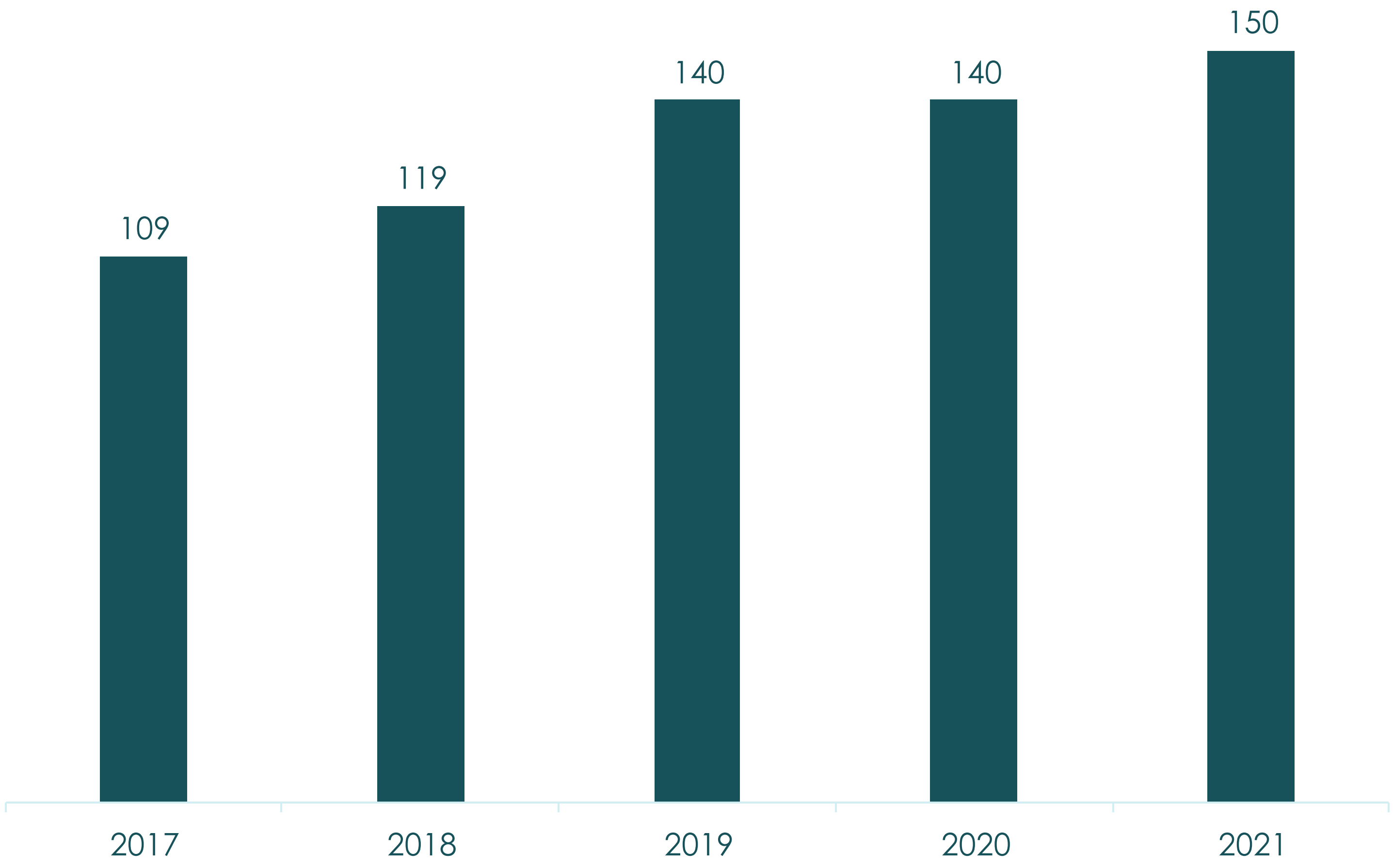


The main producers of UTZ certified tea in 2021 continue to be India, China and Kenya. The latter experienced some growth (+29%).

Tea Certification Data Report 2021 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: Colombia, Argentina, South Korea, Indonesia, Malawi, Mozambique, Rwanda, Sri Lanka, and Zimbabwe.

Registered supply chain actors



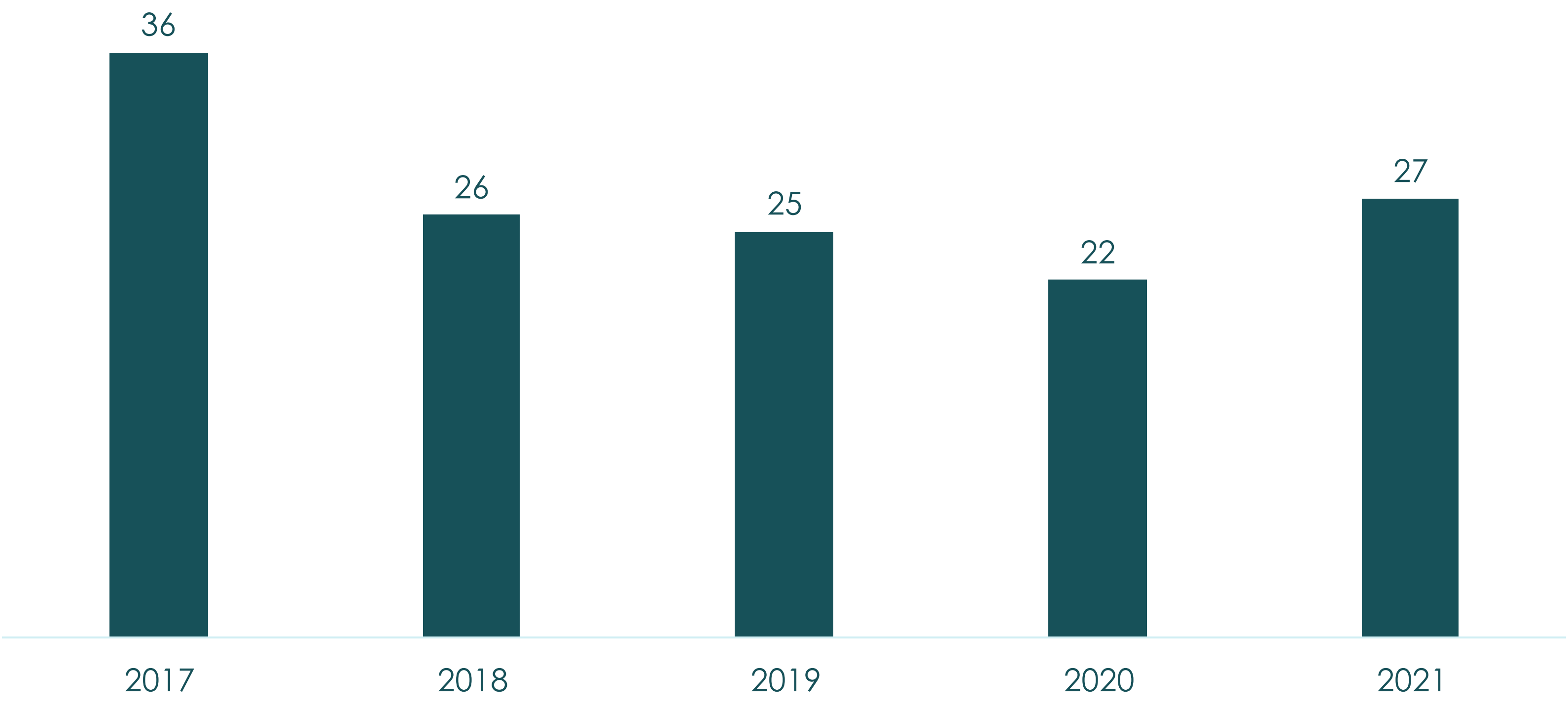
'Supply Chain Actors' include traders, processors, blenders, packers, and retailers.

The number of supply chain actors increased to 150 and is led by Europe (88 supply chain actors).
An important increase is seen in Germany (from 33 to 38 supply chain actors).

Tea Certification Data Report 2021
UTZ program

Premium

Average UTZ premium in EUR/MT

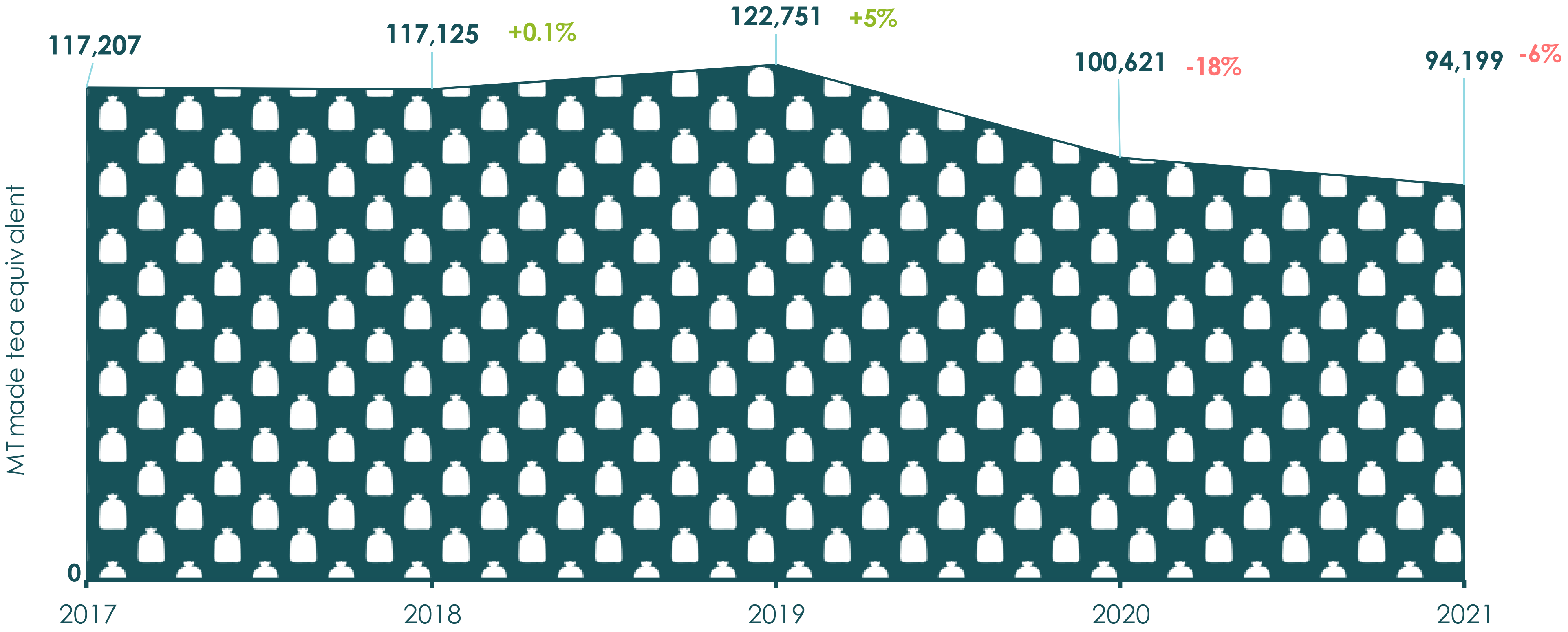


Premium has increased by 20% in 2021, compared to 2020.

Tea Certification Data Report 2021
UTZ program

Estimated Production

Global estimated tea production

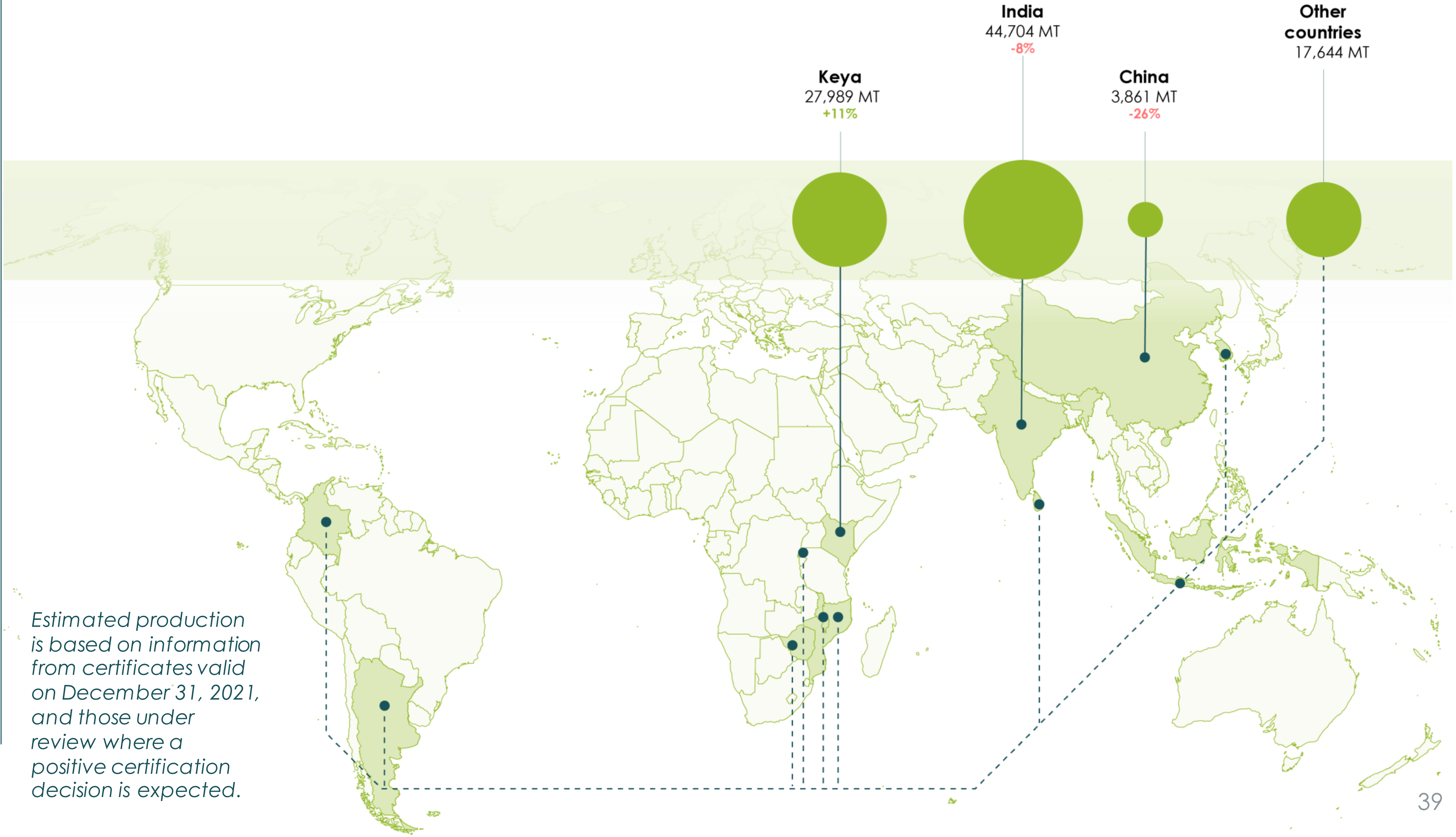


Estimated production is based on information from certificates valid on December 31, 2021 and those under review where a positive certification decision is expected.

Globally the certified volume in the UTZ program dropped by 6%.

Tea Certification Data Report 2021
UTZ program

Estimated production per origin

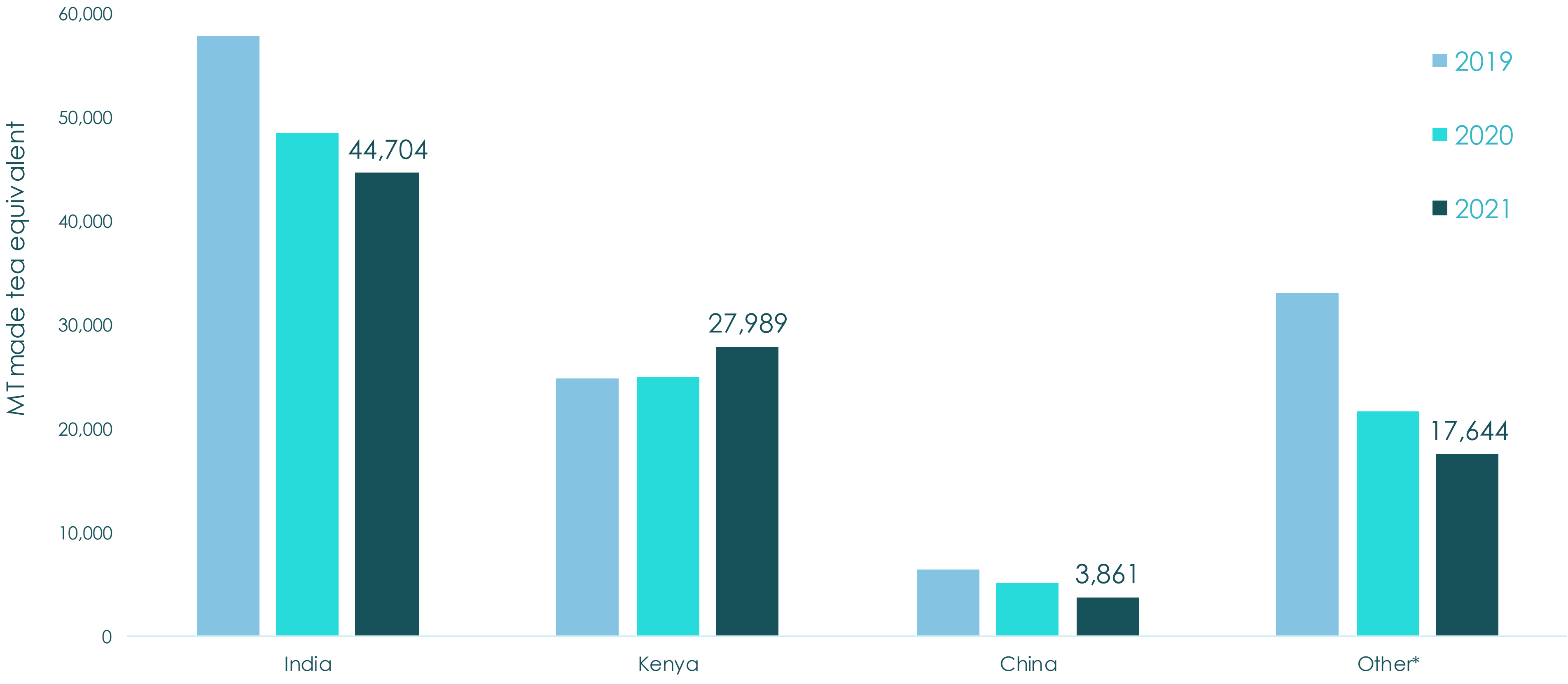


Estimated production is based on information from certificates valid on December 31, 2021, and those under review where a positive certification decision is expected.

Decreases are observed in Asia Pacific (-10%), and Africa (-7%), while in Latin America there is 100% increase. Large drops are observed in China (-50%) and Malawi (-50%)

Tea Certification Data Report 2021
UTZ program

Estimated production per origin

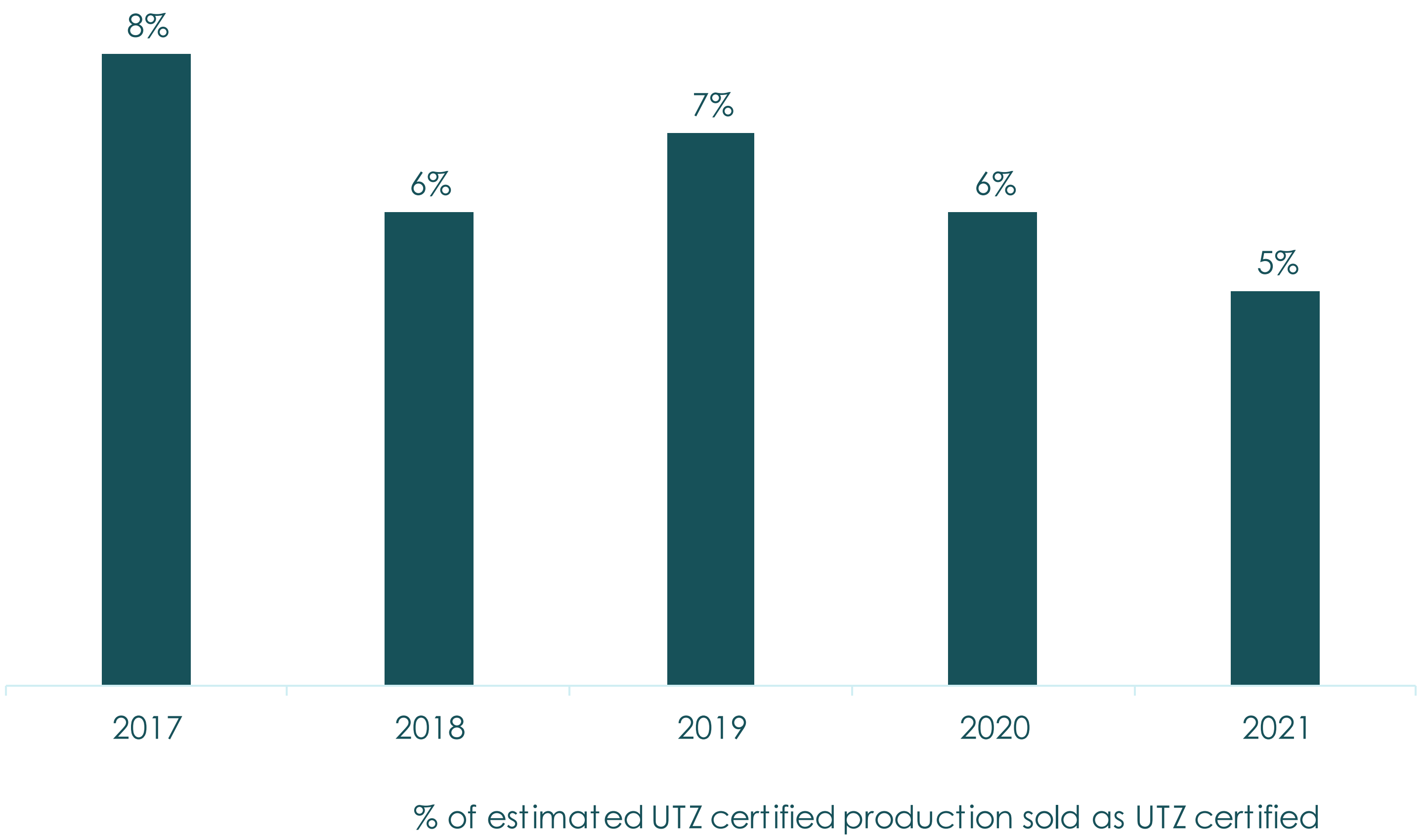


Globally the certified volume in the UTZ program dropped by 6%.
Top 3 countries are India (44k+ MT), Kenya (27k+ MT) and Zimbabwe (4k+ MT). Large drops are observed in China (-50%) and Malawi (-50%)

Estimated production is based on information from certificates valid on December 31, 2021 and those under review where a positive certification decision is expected.
Other countries are: Colombia, Argentina, South Korea, Indonesia, Malawi, Mozambique, Rwanda, Sri Lanka, and Zimbabwe.

Supply and Demand ratio

Supply – Demand ratio

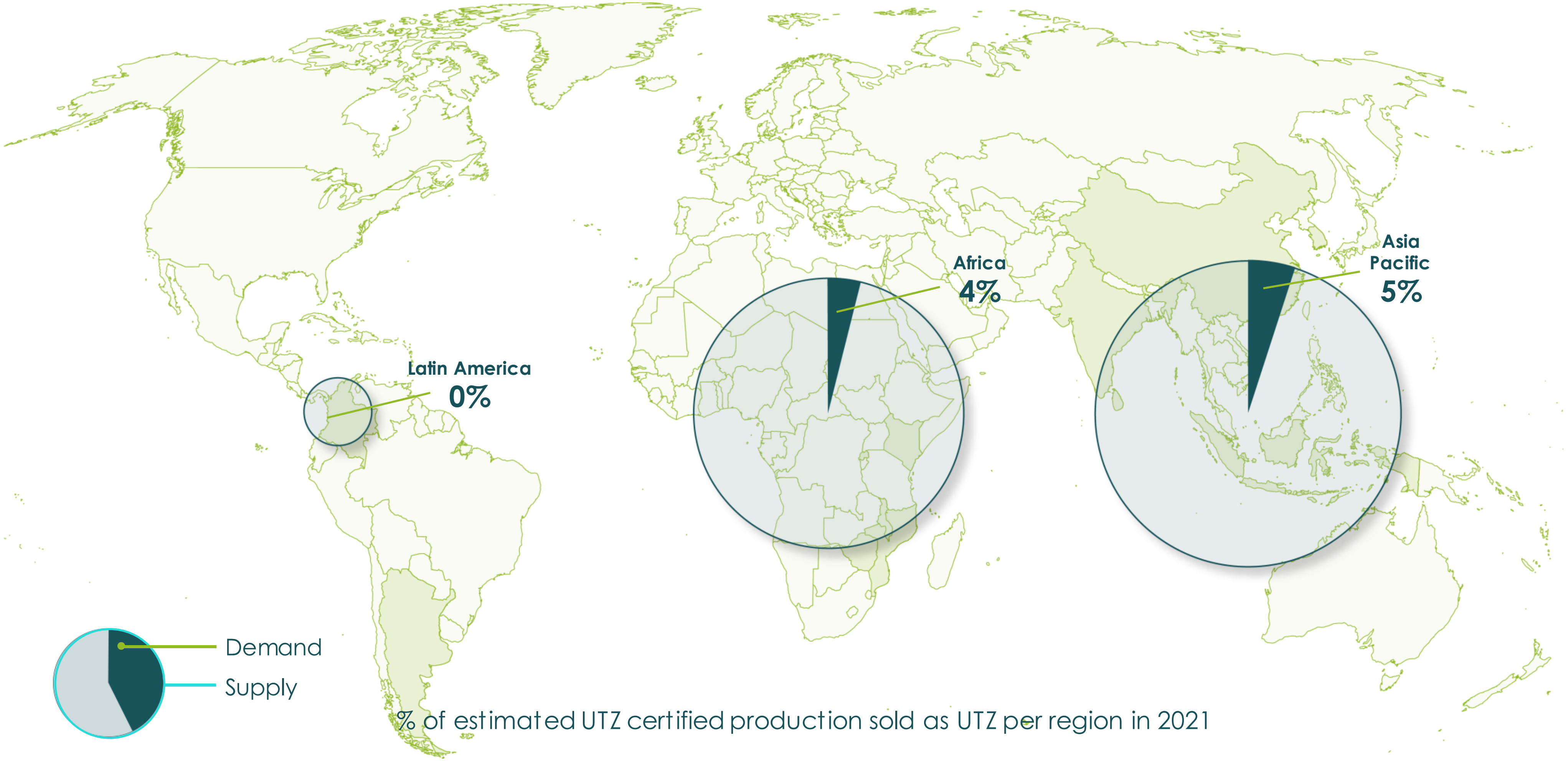


This is based on confirmed producer sales and estimated production on December 31, 2021. It indicates an estimation, not an absolute number.

Globally for the UTZ program, the % of estimated certified volume sold as certified increased by 5% in 2021

Tea Certification Data Report 2021
UTZ program

Supply – Demand per region



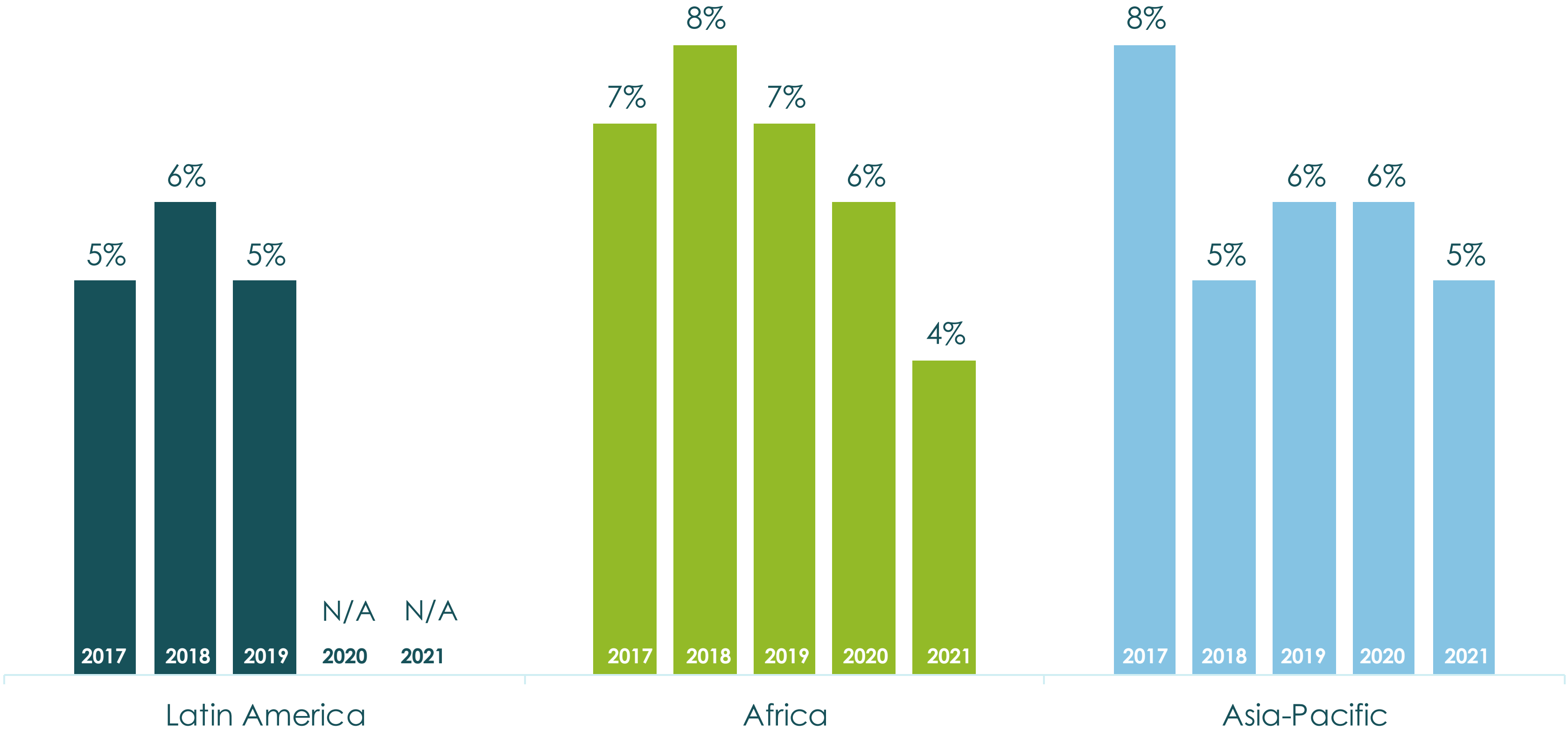
% of estimated UTZ certified production sold as UTZ per region in 2021

This is based on confirmed producer sales and estimated production on December 31, 2021. It indicates an estimation, not an absolute number.

The share of certified production sold as UTZ remains stable in 2021, with 4% in Africa and 5% in Asia Pacific

Tea Certification Data Report 2021
UTZ program

Supply – Demand per region



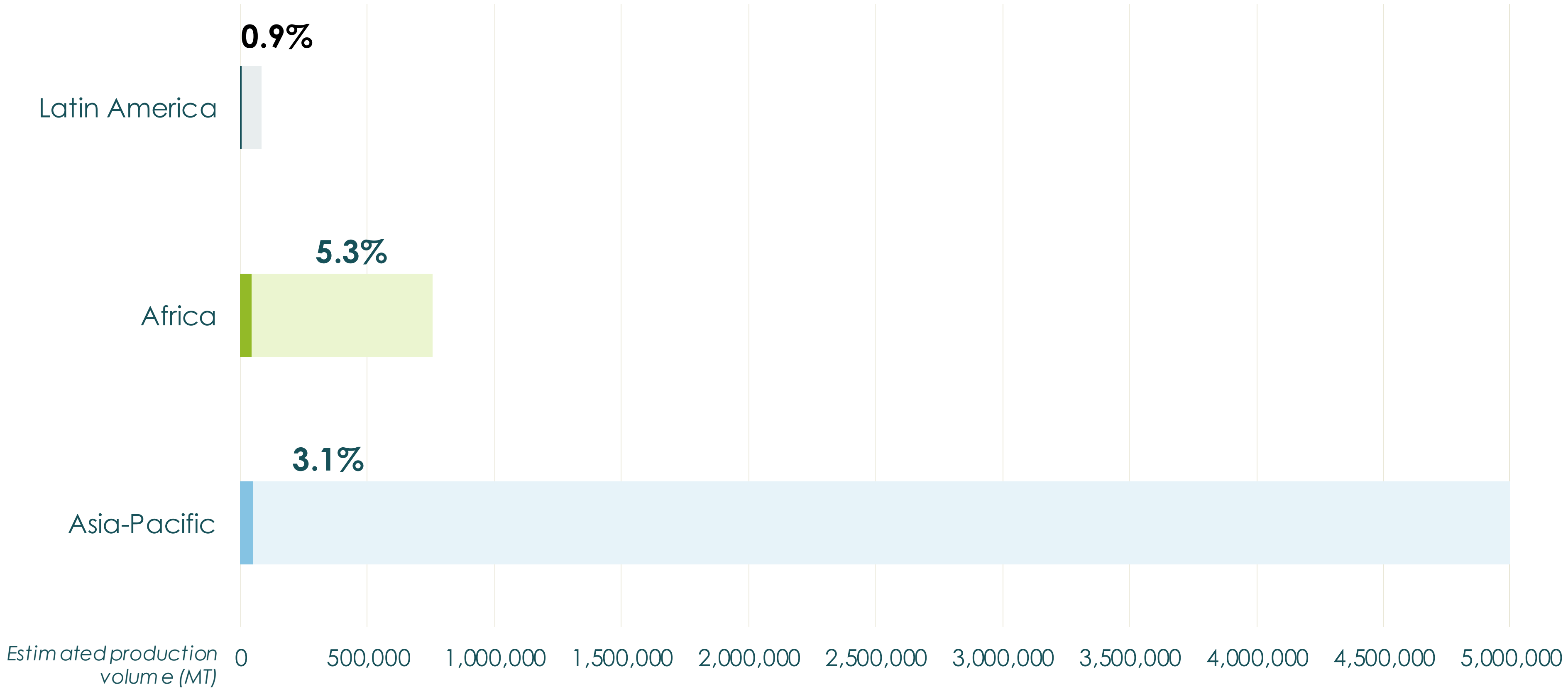
% of estimated UTZ certified production sold as UTZ

This is based on confirmed producer sales and estimated production on December 31, 2021. It indicates an estimation, not an absolute number.

Globally for the UTZ program, the % of estimated certified volume sold as certified increased by 4%

Tea Certification Data Report 2021
UTZ program

Production market share per region



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

The market share of UTZ Certified tea dropped in all regions and countries, with the exception of Kenya (+19%).

Multi-certification

Multi-certification

94%

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

77% Rainforest Alliance

26% Fairtrade

45% Organic

The most common multi-certification was UTZ and Rainforest Alliance Certified with 77%

Tea Certification Data Report 2021
UTZ program

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

Certification data

RAINFOREST ALLIANCE

Estimated production (MT)

Country	2019	2020	2021
Global	122,751	100,621	94,199
China	6,549	5,223	3,861
India	57,971	48,527	44,704
Kenya	24,953	25,144	27,989
Other*	33,278	21,727	17,644

Global sales (MT)

Country	2019	2020	2021
Global	8,299	6,171	4,347
China	909	720	693
India	3,537	2,507	1,812
Kenya	375	153	198
Other*	3,478	2,791	1,643

Number of farmers

Country	2019	2020	2021
Global	12,949	14,795	15,815
China	423	416	412
India	2,445	3,764	3,726
Kenya	8,215	8,191	9,552
Other*	1,866	2,424	2,125

Number of workers (permanent & seasonal)

Country	2019	2020	2021
Global	82,249	57,548	46,796
China	1,586	1,096	957
India	51,640	36,860	30,121
Kenya	3,995	3,297	3,243
Other*	25,028	16,295	11,867

Area (Hectare)

Country	2019	2020	2021
Global	62,450	56,174	46,348
China	2,690	2,249	1,852
India	32,165	24,432	22,497
Kenya	9,696	10,446	11,733
Other*	17,899	19,047	10,266

*Other countries are Colombia, Argentina, South Korea, Indonesia, Malawi, Mozambique, Rwanda, Sri Lanka, and Zimbabwe.

RAINFOREST ALLIANCE

rainforest-alliance.org