Following the 2018 merger of UTZ and the Rainforest Alliance, the new organization adopted the Rainforest Alliance name.

The UTZ certification program is now part of the Rainforest Alliance and will continue to run in parallel with the Rainforest Alliance certification program until the publication of a new, unified certification standard at the end of 2019.
Introduction

The main goal of this report is to present the scope and scale of the UTZ coffee program in 2018 – calendar year. The report is written in order 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 UTZ certified coffee
• **Program reach**: UTZ certified coffee production, premiums being paid and multi-certification of this production

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

We do our best to make sure that all of the information in this report is accurate and reliable, but as much of the data is collected by third parties, we are aware that there may be some shortcomings.

We look forward to receiving your feedback. For more information, please contact the Farm & Supply Chain Intelligence Department at datarequest@ra.org
Reach UTZ coffee program
Global Sales
Premium
Estimated production
Supply and Demand ratio
Multi-certification
Reach UTZ coffee program
Geographical reach

El Salvador and Panama are back in the UTZ Coffee program which increases the reach to 25 countries.
Program reach

770,423
Area (hectare)

290,578
# of group members and estates

193,158
# of workers (seasonal and permanent)

- Growth mainly driven by Brazil, Rwanda, Ethiopia, and India

- Half of growth in group members and estates took place in Uganda, Burundi and Vietnam

- Majority of decrease in number of workers in Honduras and Nicaragua due to political insecurity, migration, and low prices

↑ 30% Relative growth 2017-2018

↑ 29% Relative growth 2017-2018

↓ 24% Relative growth 2017-2018
Program reach

- Growth in area was mainly driven by Brazil, Rwanda, Ethiopia, and India
- Half of growth in group members and estates took place in Uganda, Burundi and Vietnam
- Majority of decrease in number of workers in Honduras and Nicaragua due to political insecurity and migration

#### Relative growth 2017-2018:
- Area (ha): + 30%
- Number of group members and estates: + 29%
- Number of workers (seasonal and permanent): - 24%
Global sales
Global coffee sales

The global UTZ Coffee sales increased by 42%, which is mainly driven by purchases from key origins Brazil, Honduras, and Vietnam.

- The global UTZ Coffee sales increased by 42%, which is mainly driven by North European retailers and high volume brands in Europe and the USA.

*Global sales* are all the confirmed sales from a certified producers’ group or estate to the first buyer. Years are calendar years.
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* Other countries include: Burundi, China, Dominican Republic, El Salvador, Laos, Panama, Papua New Guinea, Zambia,
Global sales per origin

Most UTZ Coffee sales come from Brazil (40%), Vietnam (18%), and Honduras (15%).

- Brazil: increase of sales due to higher demand and record Arabica harvest.

*Other countries include: Burundi, China, Congo, Dominican Republic, El Salvador, Laos, Panama, Papua New Guinea, Rwanda, Zambia.

‘Global sales’ are all the confirmed sales from a certified producers’ group or estate to the first buyer. Years are calendar years.
Global sales - split Arabica and Robusta

- Almost 40% increase in global Robusta sales and 43% increase in global Arabica sales
- Arabica/Robusta ratio has been stable since 2016

'Global sales' are all the confirmed sales from a certified producers’ group or estate to the first buyer. Years are calendar years.
Global sales - split Arabica and Robusta

Almost 40% increase in Robusta Producer sales and 43% increase in Arabica

- Arabica/Robusta ratio is stable from 2016 onwards

‘Global sales’ are all the confirmed sales from a certified producers’ group or estate to the first buyer. Years are calendar years.
Market uptake

In 2018, 68 new supply chain actors joined the Rainforest Alliance coffee program (+9%)

- Most of the increase comes from North America and Europe (especially Italy, Switzerland, France and Germany)

‘Supply Chain Actors’ include traders, roasters and retailers
Premium
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.

- Highest premium is paid for Arabica as in previous years.

UTZ premium calculations are based on transactions data recorded in the UTZ traceability system. Previous years values above 20 $c/lbs were excluded from the analysis. In 2017 and 2018 values above 30 $c/lbs are excluded. This change will improve our analysis and understanding of the UTZ premium.
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.

UTZ premium calculations are based on transactions data recorded in the UTZ traceability system. Values above 30 $/c/lbs are excluded from the analysis.
Estimated Production
UTZ estimated production

- After a minor decrease in 2017, estimated production has increased a lot compared to 2015 & 2016
- Arabica/Robusta ratio is aligned with ratio in sales

1,102,825 MT

MT Green Coffee Equivalent | Estimated production is based on license information from licenses valid on December 31st 2018
After a minor decrease in 2017, estimated production has increased greatly compared to 2015 & 2016.

Arabica/Robusta ratio is aligned with ratio in sales.

Estimated production is based on license information from licenses valid on December 31st 2018.
UTZ estimated production per origin

- Brazil: record Arabica harvest estimation

Estimated production is based on license information from licenses valid on December 31st 2018 | ‘Other’ includes: Burundi, China, El Salvador, Laos, Panama, Papua New Guinea, Zambia
Brazil: increase of estimated production due to a record Arabica harvest estimation
77% of total increase in estimated production happened in top 5 countries

‘Global sales’ are all the confirmed sales from a certified producers’ group or estate to the first buyer. Years are calendar years.
* Other countries include: Burundi, China, Congo, Dominican Republic, El Salvador, Laos, Panama, Papua New Guinea, Rwanda, Zambia.
Supply and Demand ratio
### Supply – Demand trend

Producers sold on average 47% of their estimated production as UTZ.

<table>
<thead>
<tr>
<th>Year</th>
<th>% of estimated production sold as UTZ</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>37%</td>
</tr>
<tr>
<td>2017</td>
<td>43%</td>
</tr>
<tr>
<td>2018</td>
<td>47%</td>
</tr>
</tbody>
</table>

- Increasing trend since 2016

This is based on Producer sales and estimated production 2018. It indicates a trend but not an absolute number.
Supply – Demand trend

- Producers sold on average 47% of their estimated production as UTZ.
- Increasing trend since 2016

This is based on Producer sales and estimated production 2018. It indicates a trend but not an absolute number.
Multi-certification
Multi-certification

42% of the UTZ producers’ groups and estates were certified for at least one other standard.

- In 2018, 42% of the UTZ producers’ groups and estates were certified for at least one other standard.
- Double-certification UTZ and Rainforest Alliance is the predominant combination.

28% Rainforest Alliance
10% Fairtrade
17% Organic
20% 4C

Multi-certified represents the number of UTZ coffee producers’ groups and estates that were also certified for one or more of the following schemes: Fair Trade; Rainforest Alliance; Organic and 4C. Other schemes are excluded from the total Multi-certification figures.
Multi-certification

In percentage of number of producers’ groups and estates

In 2018, 42% of the UTZ producers’ groups and estates were certified for at least one other standard
Double-certification UTZ and Rainforest Alliance is the predominant combination

Multi-certified represents the number of UTZ coffee producers’ groups and estates that were also certified for one or more of the following schemes: Fair Trade; Rainforest Alliance; Organic and 4C. Other schemes are excluded from the total Multi-certification figures.