

# TRENDS IN THE TRADE OF CERTIFIED COFFEES



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## Abstract for trade information services

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### **Trends in the Trade of Certified Coffees.**

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Provides an overview of global market trends for the sustainable segment of the coffee industry – highlights the importance of certification in traditional and emerging markets; outlines the main sustainability certification and verification schemes such as Fairtrade, FLO, Organic, Utz Certified, Rainforest Alliance, and 4C, and provides volumes of traded coffee for each; considers the impact of these standards on coffee producers and the industry; includes bibliographical references.

Descriptors: **Coffee, Standards, Organic, Fairtrade, Utz Certified, Rainforest Alliance, 4C.**

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English, French, Spanish (separate editions)

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## **Sustainability Market Assessments**

This is part of a series of Sustainability Market Assessments produced under the ITC's Trade, Climate Change and Environment Programme, financed by the Government of Denmark. The preparation of this report also received support from the State Secretariat for Economic Affairs (SECO).

The series aims to inform exporters, civic society and policymakers on trends in the growing market for sustainably produced goods and services.

## **Methodology**

The authors collected this data throughout 2010. Significant portions come from desk research and include internal and external reports of the initiatives themselves, though some of the reports are not publicly available. The work also utilized surveys and a number of key expert interviews, particularly in countries of origin. For Organics, sources for data are primarily a number of collaborators in the exporting countries that were contacted individually and secondary data, in some cases, came from various reports and some International Coffee Organization (ICO) export statistics, where these are reasonably complete.

Volumes shown are for each individual initiative and in most cases these numbers include coffees that are certified or verified by other initiatives as well. Taken in simple aggregate, the individual numbers would actually overstate the combined total volume of these certified coffees. Care must be taken when making global claims to ensure a reasonable accounting of the double and even multiple certifications applying to the same coffee.

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## Acronyms

COSA	Committee on Sustainability Assessment
EU	European Union
FiBL	Research Institute of Organic Agriculture
FLO	Fairtrade Labelling Organizations International
ICO	International Coffee Organization
IPM	Integrated Pest Management
ITC	International Trade Centre
SMBC	Smithsonian Migratory Bird Center
T4SD	Trade for Sustainable Development
UNCTAD	United Nations Conference on Trade and Development
WTO	World Trade Organization
4C Association	The Common Code for the Coffee Community

## Executive Summary

In the last decade, consumer concerns over the environment and the socio-economic conditions facing farmers in the developing world have driven strong growth in sustainability oriented standards and labels. Retailers and manufacturers have promoted such cause-related marketing as a type of differentiation tool, a means to improve the sustainability of producers, and to fulfil corporate social responsibility objectives. Evidence about producer benefits is mixed. Coffee is the world's most widely traded agricultural commodity, exported by sixty countries and grown predominantly by smallholder farmers, many of them women.

This paper, based on desk research and interviews with industry experts, examines the growth in the sustainability coffee market. It examines the volumes traded and market share of the main sustainability labels, including: FairTrade, Organic, Rainforest Alliance, Utz Certified and the Common Code for the Coffee Community (4C Association).

The paper concludes that certified coffee is moving rapidly from a niche to the mainstream. It is a fast growing segment of the market, with strong interest from major corporations and non-governmental organizations alike. At current growth rates, certified coffees would grow from the current 8% market penetration level in 2009 to 20%-25% of the global coffee trade by 2015.

## Trends in demand

The mature markets of the European Union, Japan and the United States account for half of total global sales. Demand for conventional (i.e. non-certified) coffee is largely stagnant in these markets, whilst it is thriving in emerging markets. Certified coffee, however, is showing strong growth and higher retail prices, particularly in mature markets. This trend is also followed by other commodities, including tea, cocoa and cotton. A new industry of inspectors and technicians has emerged to service the sustainability segment of the market

In 2009, 8% of all green coffee exported had some form of certification of credible claim of sustainability. The Netherlands is the leader in market share with 40% of coffees now certified. In the United States, the world's largest single market, 16% of all raw coffee imports are certified, whilst, Denmark, Sweden and Norway have passed 10%. Market share in Germany is about 5%. Certified coffees have a higher market

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