

Coffee Certification Data Report 2021

Rainforest Alliance and UTZ programs



Introduction

This report presents the scope and scale of the Rainforest Alliance 2017 and UTZ coffee 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 2017 Certified and UTZ certified coffee;
- **Program reach**: estimated Rainforest Alliance 2017 Certified and UTZ certified coffee production, farmers, 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.

Please note: 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.



Summary

In 2021, the estimated certified production volume for the UTZ certification program remained stable, while the same indicator in the Rainforest Alliance 2017 program grew by 10%, resulting in overall growth in estimated production for the combined UTZ-Rainforest Alliance program.

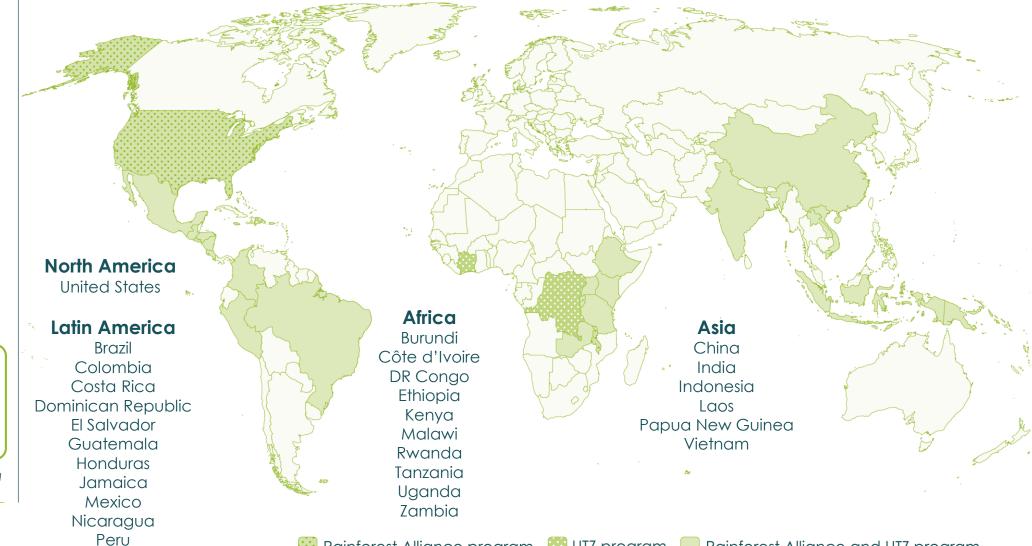
Other reach indicators followed a similar trend: there was an increase in the number of farmers and certified areas, and a decrease in the numbers of certificate holders for the UTZ certification program, while the Rainforest Alliance program reported increases for the same indicators.

For market uptake, global producer sales for the UTZ certification program experienced a 7% decline, while the same indicator in the Rainforest Alliance (2017) certification program grew by 9%.

This means that the programs' reach yielded modest growth, while market uptake of the two programs taken together declined by one percent overall compared to 2020.



Geographical program reach



Rainforest Alliance program 🔛 UTZ program 🥟 Rainforest Alliance and UTZ program

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



Program reach: Rainforest Alliance and UTZ



Area (hectare)

Combined estimated production area



Number of farmers

Combined number of farmers

Coffee Certification Data Report 2021 Rainforest Alliance and UTZ programs Combined figures are calculated by subtracting the figures of dual certified producer groups and individual farms from the total of UTZ and Rainforest Alliance.



Coffee Certification Data Report 2021

- Rainforest Alliance program
- UTZ program



Rainforest Alliance Coffee program







Geographical program reach



The number of countries with Rainforest Alliance Certified coffee producers was 25 in 2021.





583,026

Relative growth 2020-2021: +12%

Area (hectare)



296,612

Relative growth 2020-2021: +30%

Number of farmers



845,947

Relative growth 2020-2021: +10%

Estimated production (MT)



447,414

Q Q'

Relative growth 2020-2021: +34%

Number of workers (seasonal and permanent)





In 2021, the estimated certified production area increased by 12%, with increases in Latin America, driven by growth in Brazil, Colombia and Guatemala.

Area (hectare)



In 2021, the estimated certified volume rose by 10% compared to a year before. The increase can be explained partly by producers switching to the 2017 Rainforest Alliance program, in anticipation to registering for the new Rainforest Alliance Certification program.

Estimated production (MT)



Globally, the number of farmers increased strongly in the program (+30%), with more farmers across all regions, particularly in Africa (+35%), and Latin America (+20%).

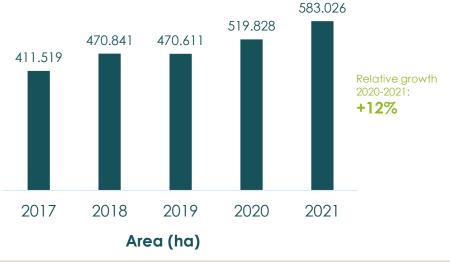
Number of farmers

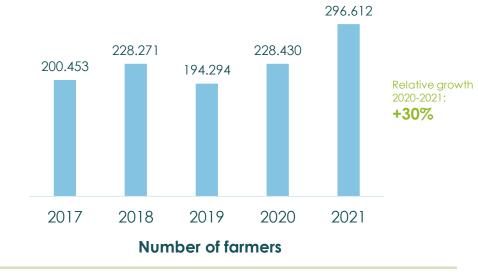


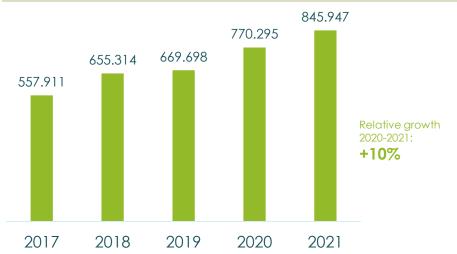
In 2021, the number of workers in the Rainforest Alliance Program grew by 34%, with a 42% increase in Latin America followed by Asia Pacific with 33%.

Number of workers (seasonal and permanent)











Coffee Certification Data Report 2021 Rainforest Alliance program

Estimated production (MT)

Number of workers (seasonal and permanent)

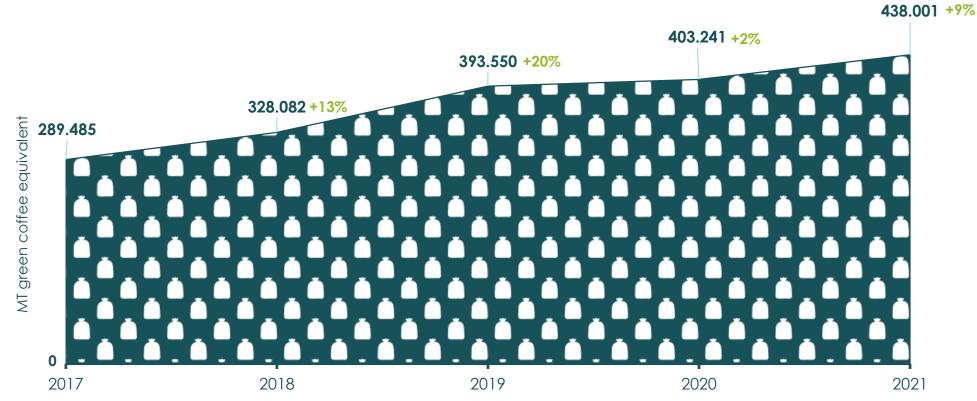


Global sales



Global coffee sales

The global sales of Rainforest Alliance certified coffee rose by 9% driven by higher sales in Latin America as well as Africa. Highest growth was seen in Guatemala (+34%), Honduras (38%) and Nicaragua (38%)



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

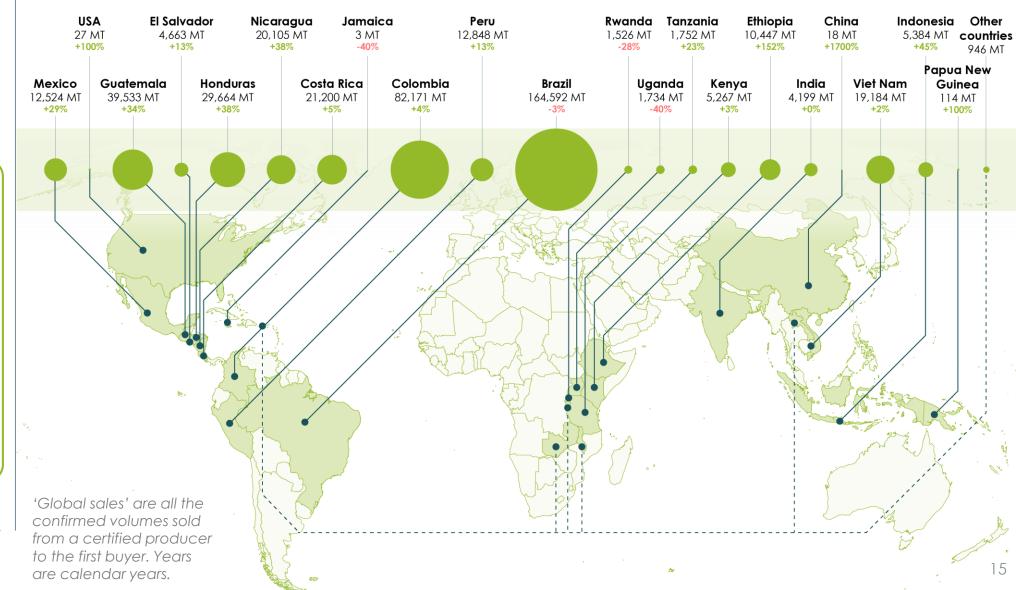


In 2021, sales increased steadily by 9%, and across all regions; +31% in Africa; +7% in Asia Pacific; and +8% in Latin America.

In Africa, this growth stemmed particularly from Ethiopia (+152%), due to new conditions on the ground, including a rise in global demand for Ethiopian coffee for blends

Coffee Certification Data Report 2021 Rainforest Alliance program

Global sales per origin

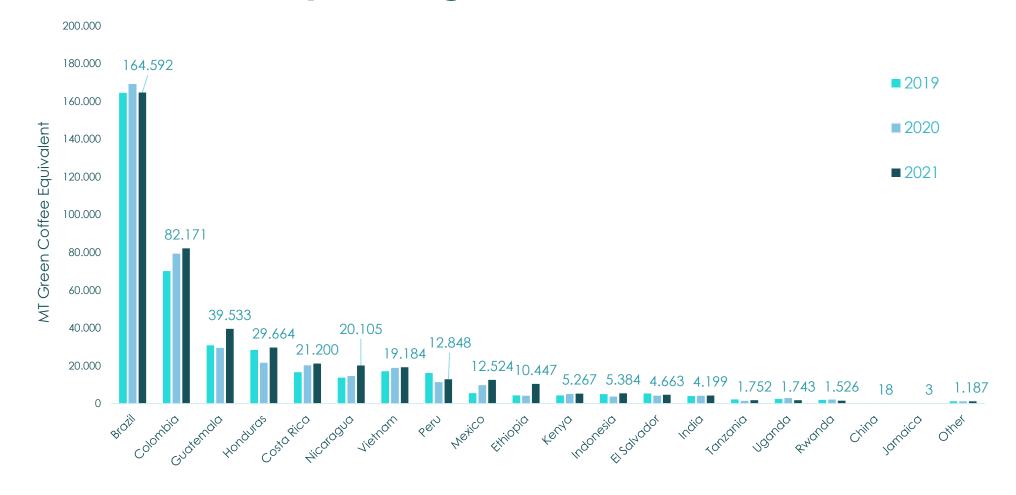




Most Rainforest Alliance Certified coffee was sold from producers in Brazil (38%), Colombia (19%) and Guatemala (9%)

Coffee Certification Data Report 2021 Rainforest Alliance program

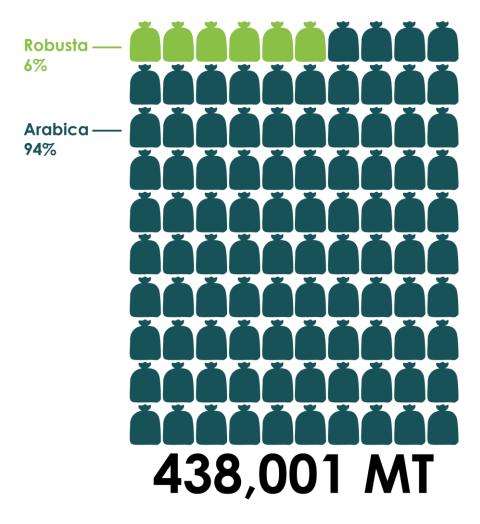
Global sales per origin



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



Global sales – Arabica / Robusta



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

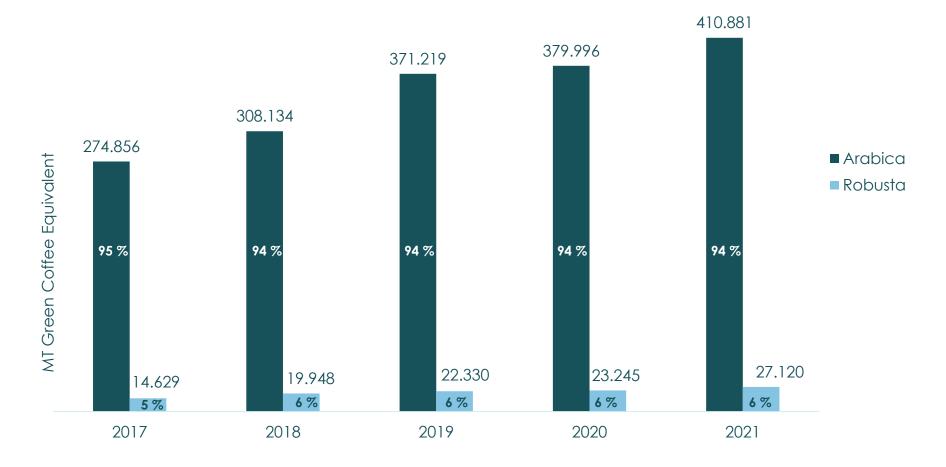
Coffee Certification Data Report 2021 Rainforest Alliance program

'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 steadily by 11%, driven by sales growth in Latin America. Robusta also experienced growth due to higher demand for the variety.

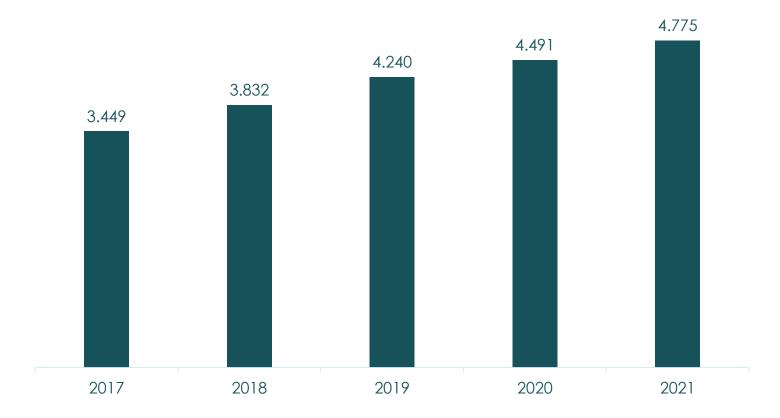


^{&#}x27;Global sales' are all the confirmed volumes sold from a certified producer to the first buyer. Years are calendar years.



Registered supply chain actors

Globally, the number of Supply Chain Actors increased steadily (+6%), with similar increases across all regions. The region with the biggest increase was Latin America.



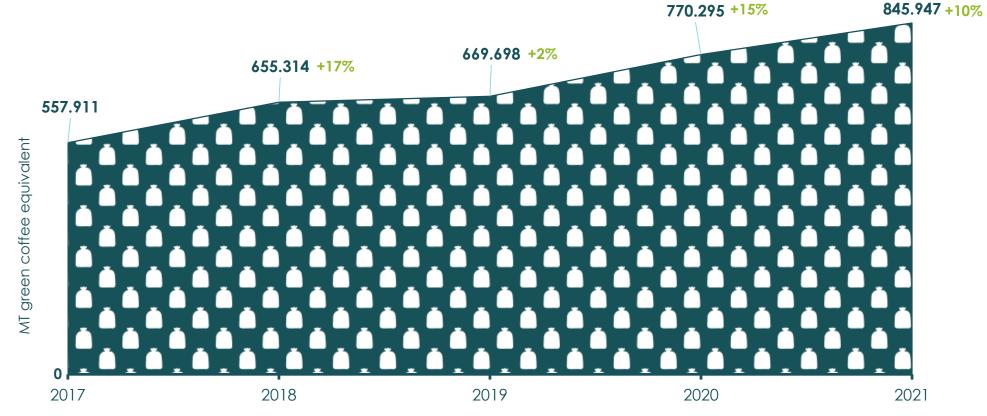
'Supply Chain Actors' include traders, roasters, brand owners, and retailers.



Estimated Production



Global estimated coffee production



Coffee Certification Data Report 2021 Rainforest Alliance program

The estimated certified volume increased by

10% (75,650 MT) compared to 2020.

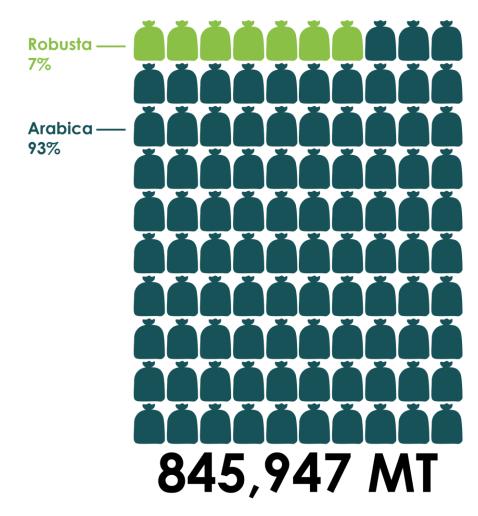


Estimated production – Arabica / Robusta

Estimated Arabica volumes grew steadily at 11%, with increases across all regions, particularly Latin America.

Estimated Robusta volumes grew slightly in Asia and Pacific but dropped in Latin America. Robusta volume dipped slightly in Africa.

Coffee Certification Data Report 2021 Rainforest Alliance program

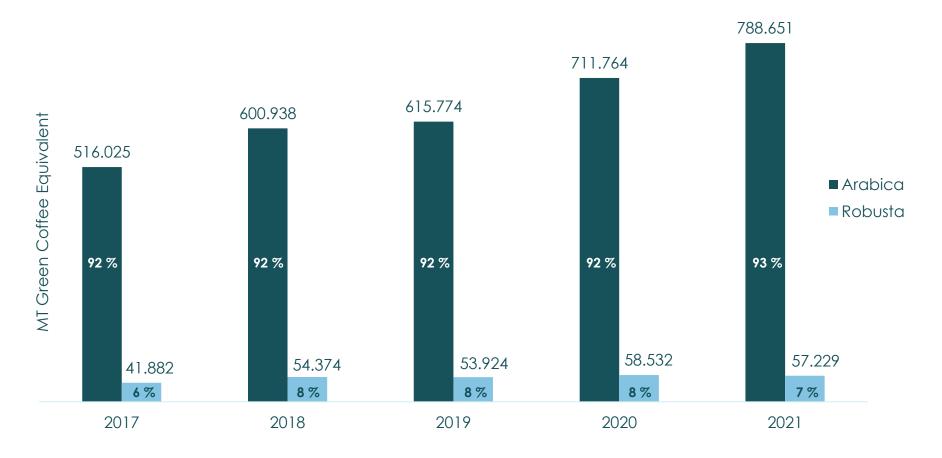




Global estimated production

Certified arabica volume strongly increased in absolute terms in the Rainforest Alliance program in Latin America, and to a lesser extent in Asia and Pacific as well as Africa.

Coffee Certification Data Report 2021 Rainforest Alliance program

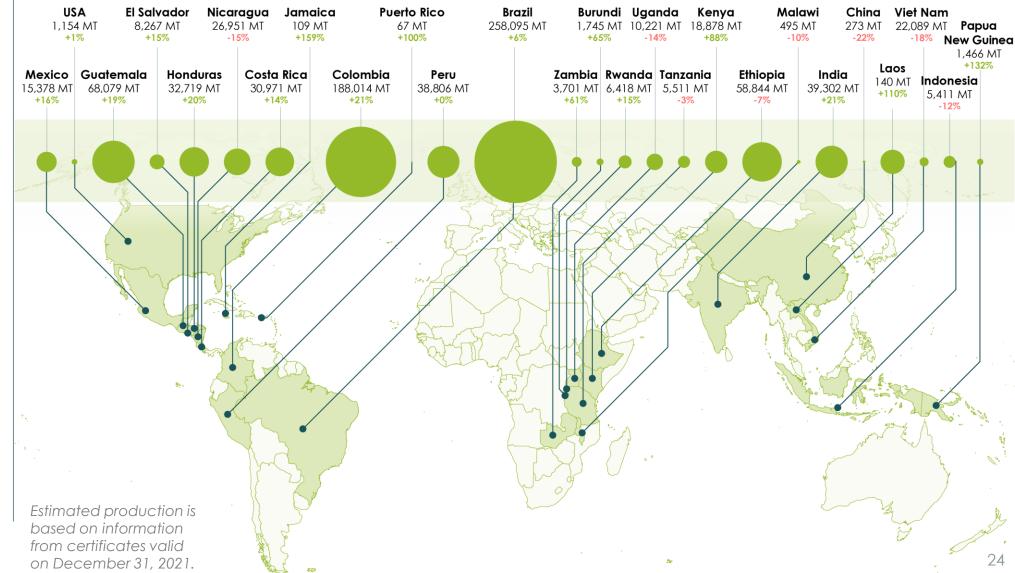




In 2021, estimated certified volumes grew steadily at 10%, with increases across all regions, particularly Latin America. There were sizable increases in production volume in countries like Brazil (6%), Guatemala (19%) Kenya (88%), that are driven by certificate holders who previously held UTZ certification moving to the Rainforest Alliance program.

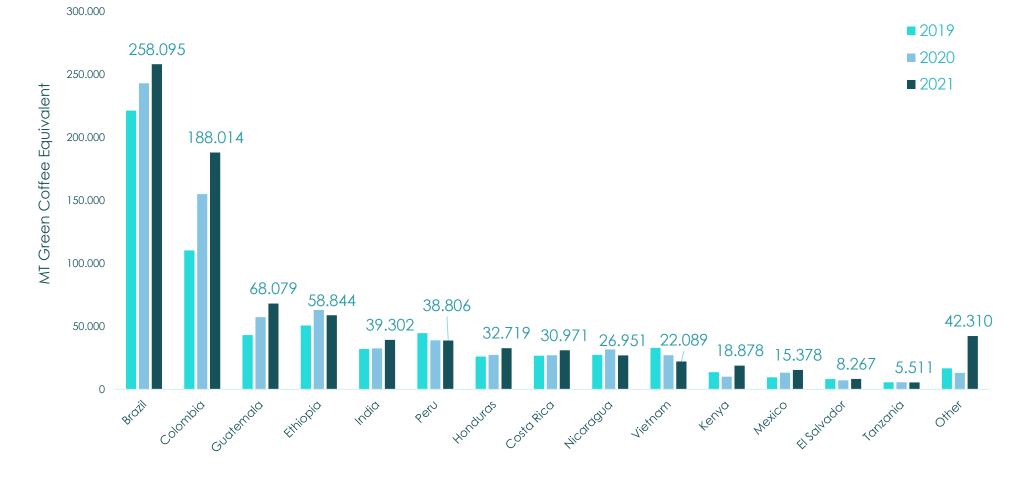
Coffee Certification Data Report 2021 Rainforest Alliance program

Estimated production per origin





Estimated production per origin



The main producers in 2021 were Brazil, Colombia, and Guatemala, which overtook Ethiopia

Coffee Certification Data Report 2021 Rainforest Alliance program

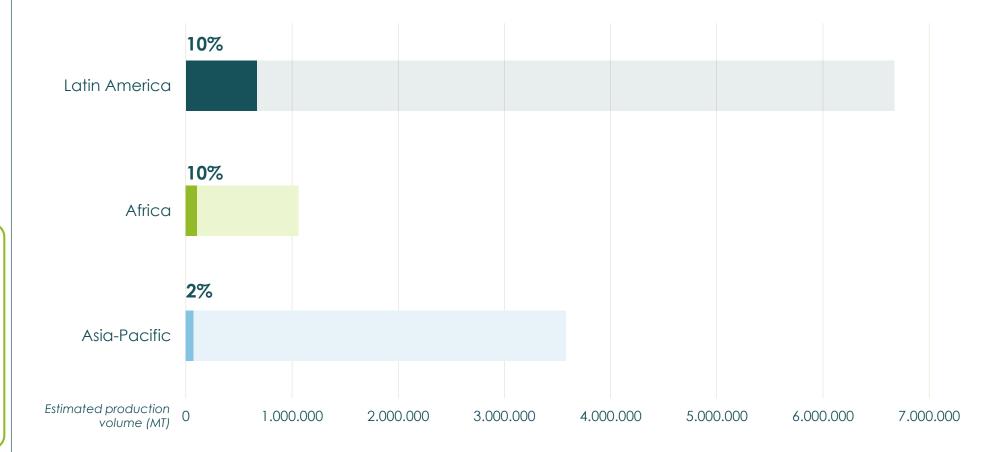


Production market share per region

Globally, the RA program's market share in production increased by +0.7% from 2020.

Market share went up slightly in most countries in Latin America 2021 (except in Nicaragua), as well as in several other origins in Africa and Asia and Pacific.

Coffee Certification Data Report 2021 Rainforest Alliance program



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



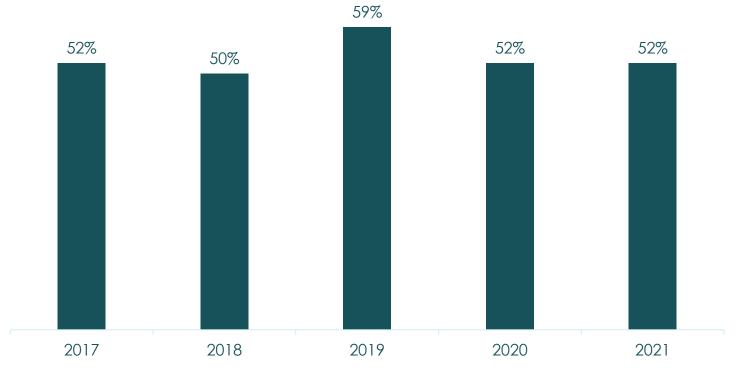
Supply and Demand ratio



Supply – Demand ratio

Globally, the S/D ratio remained unchanged at 52% in 2021. However, there are differences across regions: In Africa (24%) and Asia Pacific (41%) sales grew stronger than gains in overall volume, whereas in Latin America, the S/D ratio decreased slightly, from 60% to 58% due to faster gains in certified volume compared with sales from the region.

Coffee Certification Data Report 2021 Rainforest Alliance program



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

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

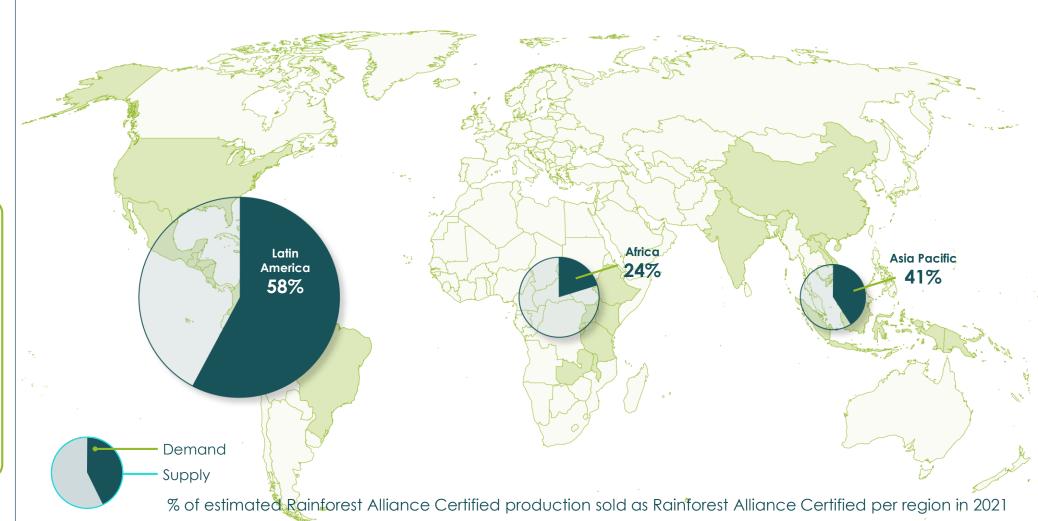


Supply - Demand per region

The global supply and demand ratio for the Rainforest Alliance coffee program remained stable at 52%.

Latin America still has the highest share of certified sales with 58% of certified production sold as Rainforest Alliance Certified.

Coffee Certification Data Report 2021 Rainforest Alliance program



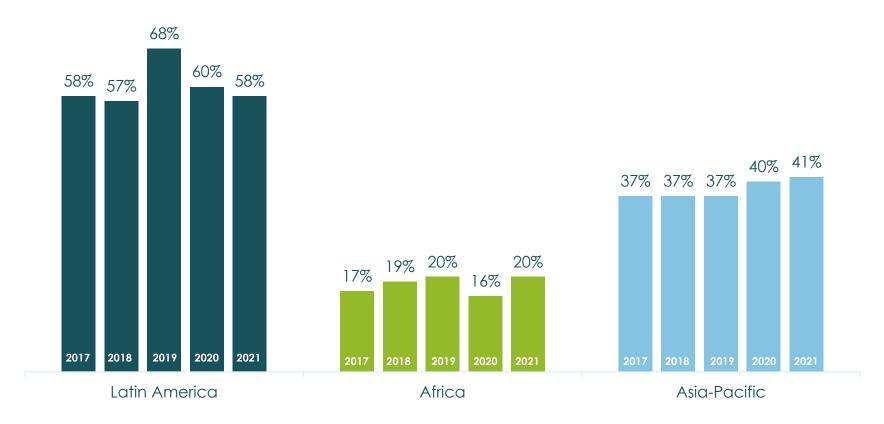
This is based on confirmed producer sales and estimated production on December 31, 2021. It indicates an estimation trend, not an absolute number.



Supply – Demand per region

While globally the supply-demand ratio remained stable for the Rainforest Alliance program, there were regional differences. In Latin America there was a decrease in the ratio since 2020, while Africa and Asia Pacific producers sold a higher percent of their production as certified than in 2020.

Coffee Certification Data Report 2021 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, 2021. It indicates an estimation, not an absolute number.



Multi-certification



Multi-certification

CERTIFIED

20%

of the Rainforest Alliance producer groups and individual farms were certified for at least one other standard 24% UTZ

18% Organic

16% Fairtrade

The combination of Rainforest Alliance and UTZ certification is the most common in all countries except the United States.

Coffee Certification Data Report 2021 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	2019	2020	2021
Global	669,698	770,295	845,947
Brazil	221,283	243,023	258,095
Burundi	1,057	1,057	1,745
China	247	349	273
Colombia	110,330	154,962	188,014
Costa Rica	26,696	27,137	30,971
El Salvador	8,144	7,179	8,267
Ethiopia	50,698	63,058	58,844
Guatemala	43,025	57,276	68,079
Honduras	26,090	27,332	32,719
India	31,995	32,577	39,302
Indonesia	4,793	6,176	5,411
Jamaica	42	42	109
Kenya	13,658	10,049	18,878
Laos	293	1,422	2,983
Malawi	550	550	495
Mexico	9,601	13,289	15,378
Nicaragua	27,279	31,649	26,951
Papua New Guinea	631	631	1,466
Peru	44,588	38,852	38,806
Puerto Rico	-	-	67
Rwanda	3,733	5,590	6,418
Sri Lanka	-	1	_
Tanzania	5,641	5,664	5,511
Uganda	3,153	11,925	10,221
USA	1,139	1,139	1,154
Viet Nam	32,933	27,060	22,089
Zambia	2,100	2,305	3,701

Global sales (MT)

Global 393,550 403,241 4 Brazil 164,480 169,066 169,066 China 200 1 1 Colombia 70,110 79,373 20,273 16,632 20,273 16 El Salvador 5,315 4,143 4,143 16 14 14 18 16 16 18 17 16 18 17 17 18 17 17 18 18 18 18 18 18 18 18	138,00 1 164,592
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Ethiopia 4,282 4,150 Guatemala 30,847 29,487 Honduras 28,323 21,573 India 3,955 4,183 Indonesia 4,950 3,716 Jamaica 8 5	21,200
Guatemala 30,847 29,487 Honduras 28,323 21,573 India 3,955 4,183 Indonesia 4,950 3,716 Jamaica 8 5	4,663
Honduras 28,323 21,573 India 3,955 4,183 Indonesia 4,950 3,716 Jamaica 8 5	10,447
India 3,955 4,183 Indonesia 4,950 3,716 Jamaica 8 5	39,533
Indonesia 4,950 3,716 Jamaica 8 5	29,664
Jamaica 8 5	4,199
Jamaica	5,384
Kenya 4,348 5,094	
	5,267
Mexico 5,476 9,737	12,52
Nicaragua 13,692 14,575	20,105
Papua New Guinea 188 -	114
Peru 16,138 11,379	12,848
Rwanda 1,936 2,111	1,52
Tanzania 2,155 1,424	1,752
Uganda 2,465 2,905	1,734
USA -	127
Viet Nam 17,088 18,836	19,184
Other* 962 1,210	940

^{*}Other countries are Burundi, Laos, Malawi, Puerto Rico, and Zambia

Number of farmers

	2019	2020	2021
Global	194,294	228,430	296,612
Africa	146,845	171,304	230,937
Asia / Pacific	13,015	17,418	17,969
Latin America	34,433	39,707	47,701
North America	1	1	5

Number of workers (permanent & seasonal)

	2019	2020	2021
Global	286,461	334,449	447,414
Africa	80,379	89,805	105,890
Asia / Pacific	36,068	44,354	59,168
Latin America	169,822	200,100	282,124
North America	192	190	232

Area (Hectare)

	2019	2020	2021
Global	470,611	519,828	583,026
Africa	120,372	142,396	159,779
Asia / Pacific	45,114	46,841	51,928
Latin America	303,999	329,464	370,170
North America	1,126	1,126	1,149



UTZ Coffee program







Geographical program reach



In 2021, there were 24 countries with coffee producing UTZ certificate holders. This number remained stable from 2020.



Program reach



826,397

Relative growth 2020-2021:

Area (hectare)



385,003

+18%

Relative growth 2020-2021:

Number of farmers

1,234,867 Relative growth 2020-2021: -0%

Estimated production (MT)



171,231



Relative growth 2020-2021:

7%

Number of workers (seasonal and permanent)



Program reach



In 2021, certified area increased steadily (+7%) due to strong growth in Africa (+40%), particularly Ethiopia and Uganda. In Asia, India presented some growth because of high demand for UTZ coffee from buyers.

Area (hectare)



In 2021, the total number of farmers grew steadily, led by growth in Africa (+37%), particularly in Ethiopia and Uganda. In both countries, this growth is partially driven by government policies promoting investment in the sector.

Number of farmers



In 2021, estimated coffee volume remained stable. Overall, there was a minor dip compared with 2020 (-0.05%), driven mainly by a decrease in Latin America (-7%).

Estimated production (MT)



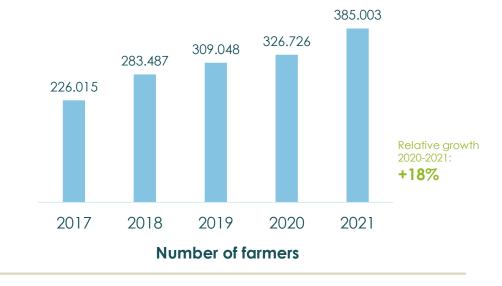
In 2021, the total number of workers in the program decreased by -7%, in particular due to fewer workers in Latin America (-30%). However, the number of workers grew in Africa (+23%) and to a lesser extent in Asia Pacific (+3%).

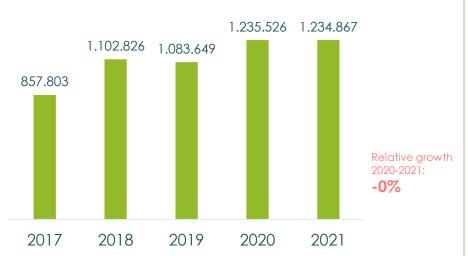
Number of workers (seasonal and permanent)



Program reach









Coffee Certification Data Report 2021 UTZ program

Estimated production (MT)

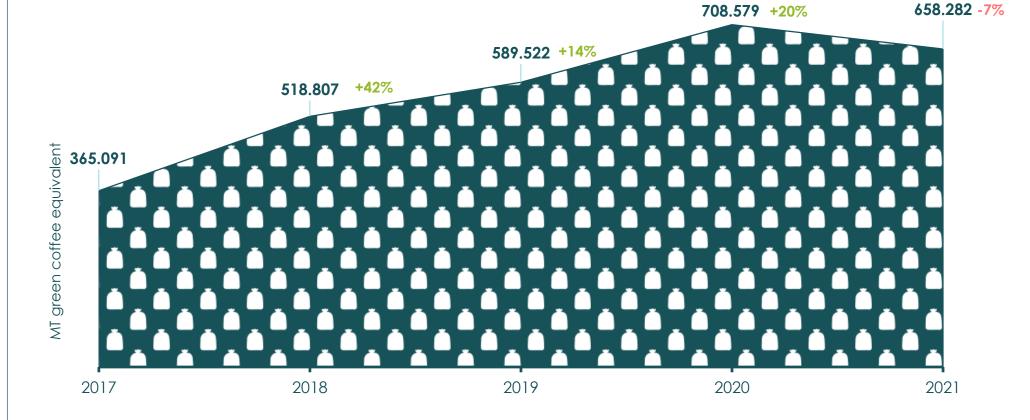
Number of workers (seasonal and permanent)



Global sales



Global coffee sales



by decreases in Asia Pacific (-16%) as well as in Latin America (-5%).

Globally, overall sales decreased -7%, driven

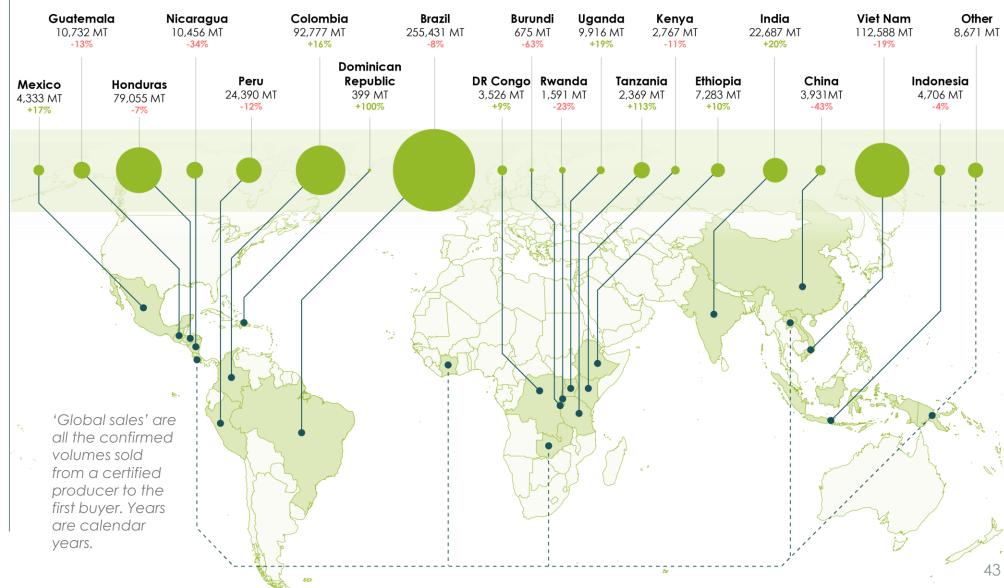
Coffee Certification Data Report 2021 UTZ program

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



Global sales per origin

Globally, overall sales decreased in the UTZ program (-7%) as a result of lower sales from the Asia and Pacific as well as Latin American regions. Conversely, overall sales rose in the RA program (+9%), driven by higher sales in Latin America as well as Africa.

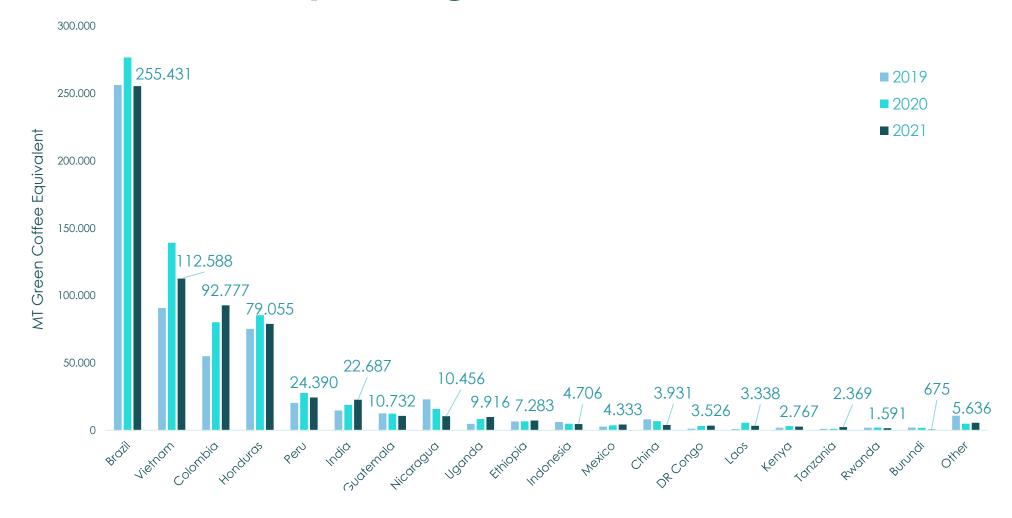




In 2021, Brazil remained ahead when it came to global sales, despite lower availability of coffee due to factors including a major frost. Another factor, that also accounts for the drop in sales in countries like Nicaragua, was a move of certificate holders towards the Rainforest Alliance programs. Vietnam is the second largest producer, although the fall in sales can partly be explained by the effects of Covid-

Coffee Certification Data Report 2021 UTZ program

Global sales per origin



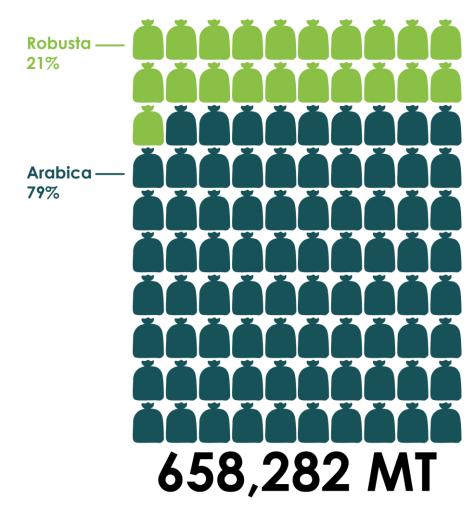
'Global sales' are all the confirmed volumes sold from a certified producer to the first buyer. Years are calendar years.



Global sales - split Arabica / Robusta

In 2021, Arabica sales decreased by 7% compared to 2020, driven by decreases in Asia and Pacific (-20%) as well as in Latin America (-6%). Robusta presented an increase of 13%, due to a doubling of estimated Robusta volumes in India, Uganda and Tanzania, among others.

Coffee Certification Data Report 2021 UTZ program

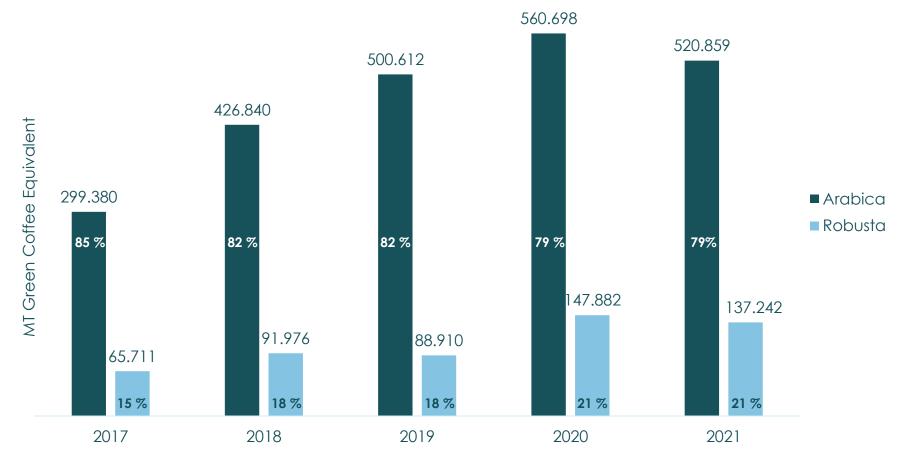


'Global sales' are all the confirmed volumes sold from a certified producer to the first buyer. Years are calendar years.



Global sales - Arabica and Robusta

In 2021, the percentage of sales of Arabica compared to Robusta remained unchanged at 79% of total global sales, compared to 2020.

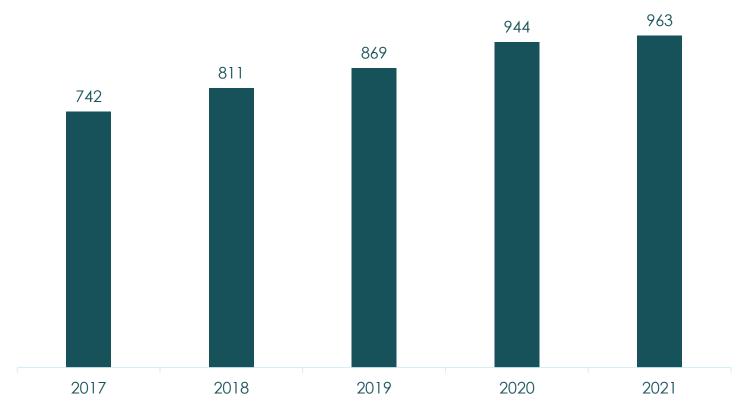


'Global sales' are all the confirmed volumes sold from a certified producer to the first buyer. Years are calendar years.



Registered supply chain actors

In 2021, the number of supply chain actors grew by 2%, with the largest increase in Europe (22 new supply chain actors, +7%)



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

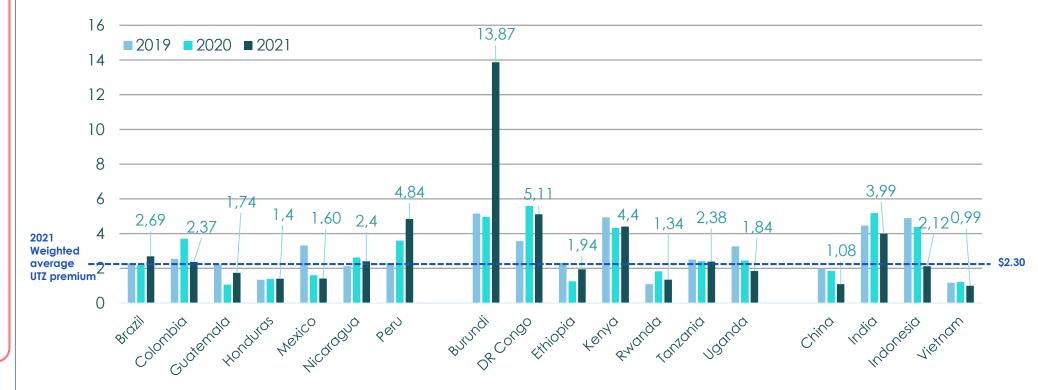


In 2021, buyers paid high premiums for Burundi coffee, and often distributed them in cash. In Ethiopia, the increase is likely related to greater demand for Ethiopian coffee, while in Guatemala and Peru the higher premium likely reflects higher market prices. In Indonesia, the sharp drop (-52%) is partially explained by the COVID-19 pandemic weakening the market, and a decrease in the UTZ program's certified coffee because of the transition to the Rainforest Alliance program

Coffee Certification Data Report 2021 UTZ program

Premium per country – per continent

Average UTZ Premium (\$/lbs)

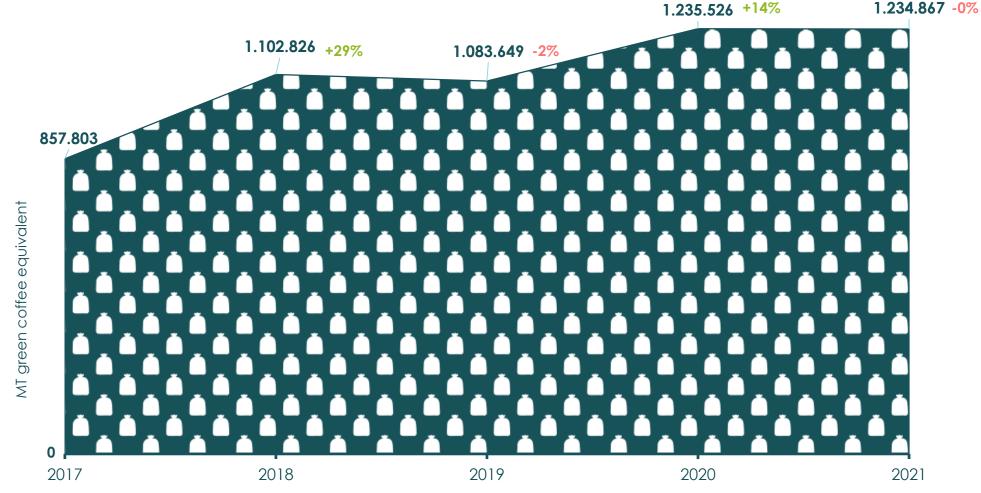




Estimated Production



Global estimated coffee 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.

The estimated certified volume remained stable from 2020.

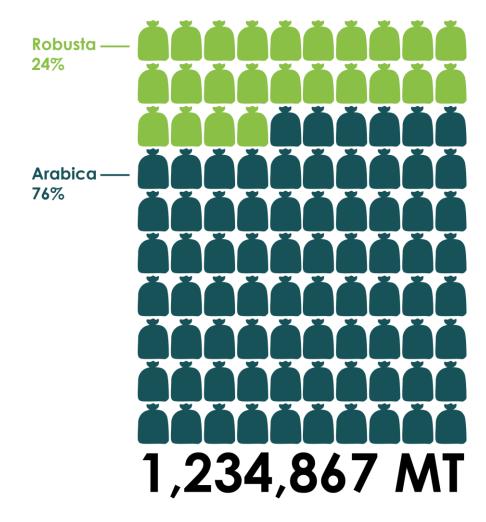


Estimated production – Arabica / Robusta

The total certified volume of Arabica coffee decreased by 4%, making up 76% of total certified volume.

In the case of Robusta, there was an increase of 4% driven by growth in Asia Pacific and, to a lesser extent, Africa.

Coffee Certification Data Report 2021 UTZ program



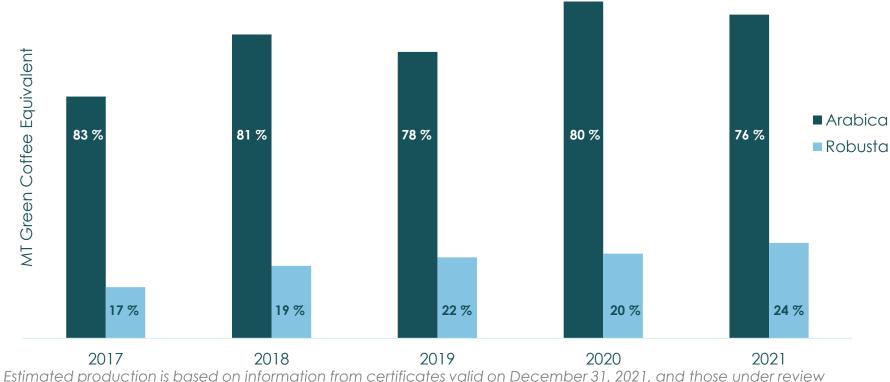
Estimated production is based on information from certificates valid on December 31, 2021 and those under review where a positive certification decision is expected.



Global estimated production

Globally, there was a decrease in estimated arabica volumes in the UTZ program (-4%), due to a sharp fall in Latin America, that was offset by gains in Africa. On the other hand. certified arabica volumes strongly increased in the Rainforest Alliance program (+11%), thanks to increases in absolute terms in the program through all regions.

Coffee Certification Data Report 2021 UTZ program



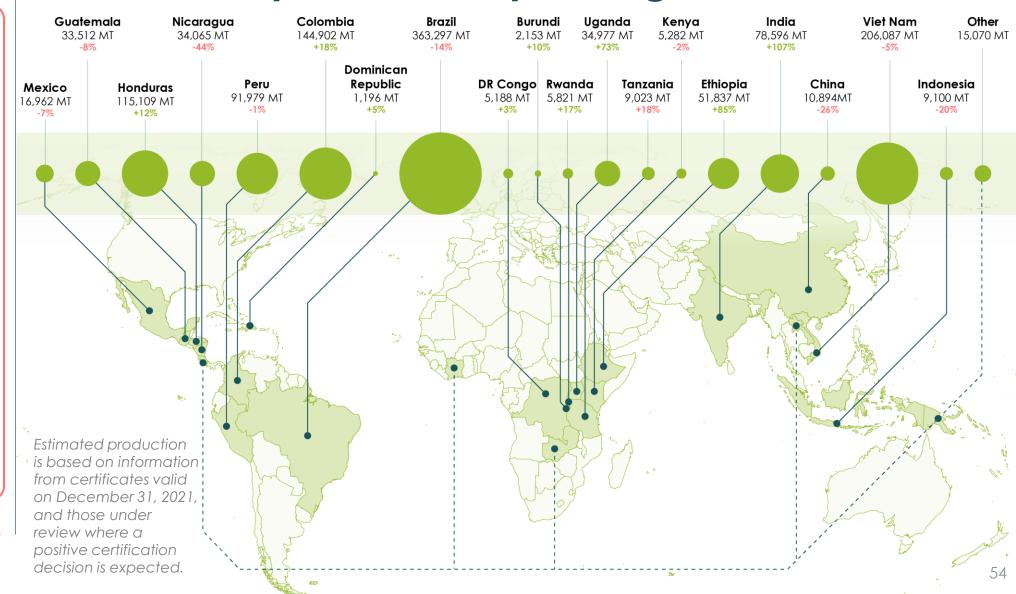
Estimated production is based on information from certificates valid on December 31, 2021, and those under review where a positive certification decision is expected.



Globally, estimated coffee volume remained stable. A minor dip compared with 2020 (-0.05%) was driven mainly by Latin America (-7%). This was particularly visible in Nicaragua (-44%) and Brazil (-14%) and can be partly explained by certificate holders switching to the Rainforest Alliance program. Ethiopia presented large growth (+85%), driven mostly by an increase in the number of certificate holders (+56%), and favorable climatic conditions that contributed to a good harvest.

Coffee Certification Data Report 2021 UTZ program

Estimated production per origin

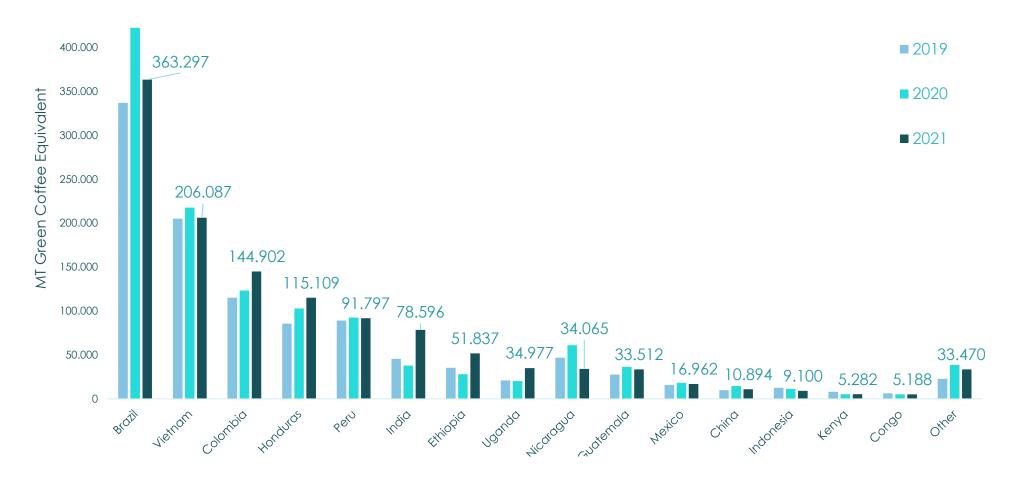




Estimated production per origin



Coffee Certification Data Report 2021 UTZ program



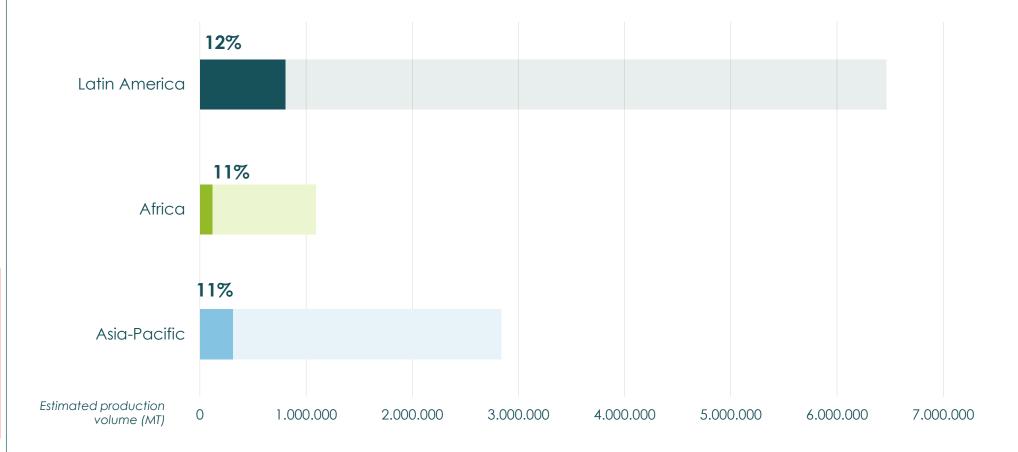
Estimated production is based on information from certificates valid on December 31, 2021, and those under review where a positive certification decision is expected.



Production market share per region



Coffee Certification Data Report 2021 UTZ program



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



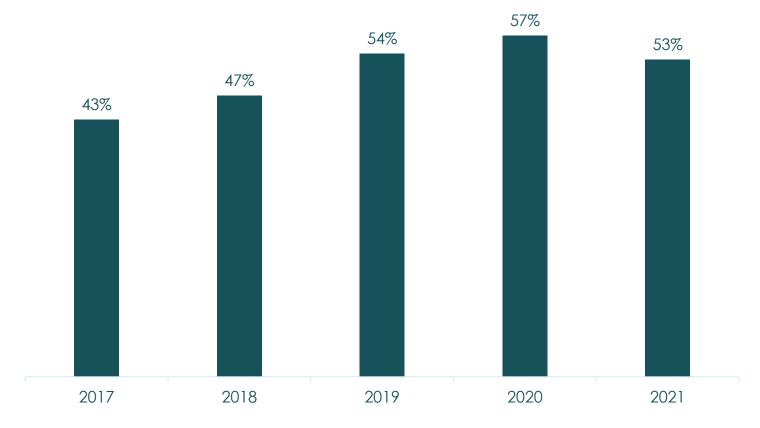
Supply and Demand ratio



Supply – Demand ratio

Producers sold on average 53% of their estimated certified volume as UTZ. The share of certified volume sold in relation to certified supply experienced a drop for the first time in a decade.

Coffee Certification Data Report 2021 UTZ program

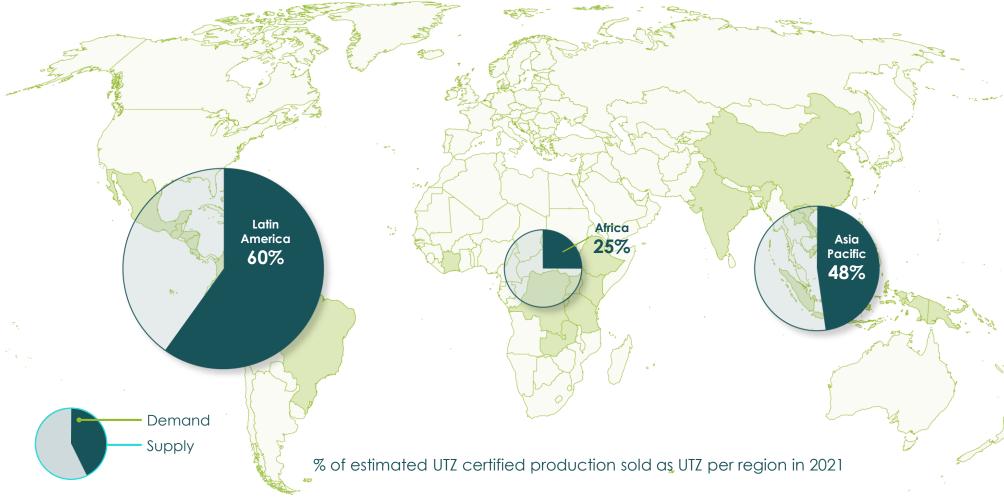


% of estimated UTZ certified production sold as UTZ certified

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



Supply – Demand per region



Latin America has the highest share of certified sales with 60% of certified production sold as UTZ, followed closely by Asia Pacific with 48%.

Coffee Certification Data Report 2021 UTZ program

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

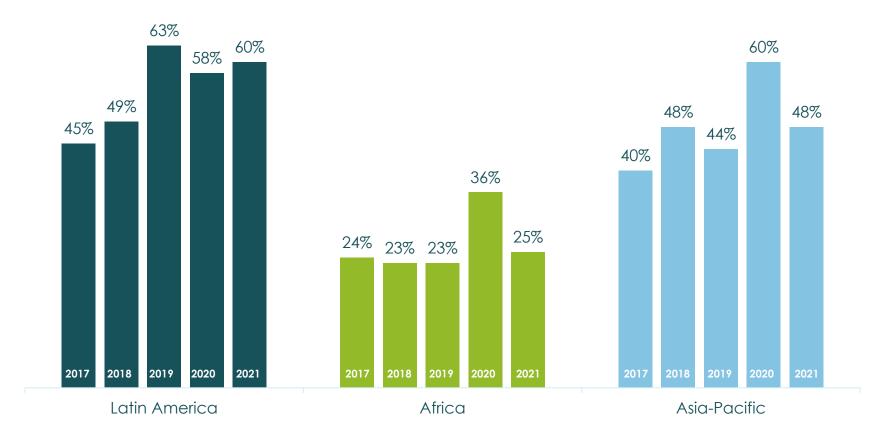


The supply and demand ratio increased in 2020 in Africa and Asia-Pacific, driven by higher demand for certified coffee. This led to a large increase in available certified volume for coffee in 2021, which accounts for the drop in the S/D ratio in those regions.

In Latin America, a lower volume of certified coffee was produced in the region in 2021, which explains the 2% increase.

Coffee 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.



Multi-certification



Multi-certification



54%

of the UTZ producer groups and individual farms were certified for at least one other standard 26% Rainforest Alliance

15% Fairtrade

25% Organic

11% 4C

Double certification UTZ-Rainforest Alliance continues to be the most predominant combination in 2021.

Coffee Certification Data Report 2021 UTZ program 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	2019	2020	2021
Global	1,083,649	1,235,526	1,234,867
Brazil	336,815	422,233	363,297
Burundi	2,464	1,950	2,153
China	9,917	14,669	10,894
Colombia	115,178	123,292	144,902
DR Congo	6,297	5,061	5,188
Dominican Republic	-	1,135	1,196
Ethiopia	35,431	28,034	51,837
Guatemala	27,684	36,399	33,512
Honduras	85,577	102,961	115,109
India	45,632	37,993	78,596
Indonesia	12,635	11,380	9,100
Kenya	7,976	5,378	5,282
Mexico	15,742	18,163	16,962
Nicaragua	46,812	60,977	34,065
Peru	89,122	92,520	91,797
Rwanda	3,276	4,978	5,821
Tanzania	3,558	7,618	9,023
Uganda	21,050	20,167	34,977
Viet Nam	205,046	217,589	206,087
*Other	13,437	23,029	15,069

^{*}Other countries are Costa Rica, Côte d'Ivoire, Laos, Papua New Guinea, and Zambia

Global sales (MT)

Country	2019	2020	2021
Global	589,522	708,579	658,282
Brazil	256,321	276,735	255,43
Burundi	2,071	1,822	673
China	8,100	6,868	3,93
Colombia	54,992	80,160	92,777
DR Congo	1,255	3,233	3,52
Dominican Republic	-	-	399
Ethiopia	6,537	6,649	7,283
Guatemala	12,694	12,381	10,732
Honduras	75,350	85,374	79,05
India	14,774	18,875	22,687
Indonesia	6,166	4,917	4,70
Kenya	1,939	3,110	2,767
Mexico	2,816	3,697	4,333
Nicaragua	22,922	15,793	10,45
Peru	20,388	27,742	24,390
Rwanda	2,000	2,062	1,59
Tanzania	4,813	8,321	9,91
Uganda	1,093	1,110	2,369
Viet Nam	90,739	139,173	112,588
*Other	4,552	10,556	8,67

^{*}Other countries are Costa Rica, Côte d'Ivoire, Laos, Papua New Guinea, and Zambia

Number of farmers

	2019	2020	2021
Global	309,048	326,726	385,003
Africa	190,290	181,519	249,126
Asia / Pacific	54,932	71,763	60,605
Latin America	63,826	73,444	75,272

Number of workers (permanent & seasonal)

	2019	2020	2021
Global	201,779	183,834	171,231
Africa	55,864	54,982	67,496
Asia / Pacific	44,183	42,493	43,582
Latin America	101,732	86,359	60,153

Area (Hectare)

	2019	2020	2021
Global	720,250	772,882	826,397
Africa	122,711	141,707	199,096
Asia / Pacific	145,498	136,357	134,832
Latin America	452,041	494,818	492,469



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