

EUDR Coffee — Colombia

Supply Chain Profile

commodity	coffee
regulation	EU Regulation 2023/1115 (EUDR)
article9_fields	geolocation, supplier_identification, deforestation_free_date, due_diligence_statement
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enforcement_sme	2025-06-30
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Colombia's Coffee Sector at a Glance

Colombia is the world's third-largest arabica coffee producer and the second-largest global exporter of washed arabica. The sector comprises approximately 540,000 coffee-farming families (caficultores) spread across roughly 853,000 hectares in 22 departments and 590 municipalities. The average farm size is 1.5–2.0 hectares, making Colombia's coffee sector overwhelmingly smallholder-based — a structural characteristic that creates both compliance challenges (fragmented geolocation data) and opportunities (high traceability potential through cooperative networks).

Key Production Departments

Coffee production is concentrated in the Andean highlands between 1,200 and 2,000 metres above sea level. The six leading departments by production volume are:

- **Huila:** Colombia's #1 coffee department by volume. Located in the southern Andean corridor. Known for micro-lot specialty coffees. Altitude ranges from 1,200–1,900 masl. Approximately 83,000 coffee farms. Municipalities of Pitalito, Acevedo, and La Plata are flagship origins. Relatively low deforestation risk in core coffee zones, though frontier expansion toward the Amazon foothills (Caquetá border) warrants satellite monitoring.
- **Nariño:** Second-largest producer, bordering Ecuador. Extreme altitude coffee (1,600–2,300 masl) with slow cherry maturation yielding high cup quality. About 40,000 farms. The departments of Buesaco, La Unión, and Sandoná are key. Deforestation risk is moderate — the Pacific lowlands adjacent to coffee zones are biodiversity hotspots under pressure from illicit crops and cattle ranching.
- **Antioquia:** Historic coffee heartland. Includes the Eje Cafetero municipalities of Andes, Jardín, Ciudad Bolívar. Approximately 78,000 farms. Established infrastructure and cooperative networks make traceability relatively mature. Deforestation risk is lower in core zones but elevated in northeastern Antioquia (Bajo Cauca region).

- **Cauca:** High-altitude specialty origin. Inzá and Popayán micro-regions produce competition-grade lots. About 95,000 farms (many indigenous and Afro-Colombian communities). FPIC considerations under EUDR Article 9 legality requirements are particularly relevant here.
- **Tolima:** Central Andean corridor. Planadas, Ataco, and Rioblanco are key municipalities. Approximately 63,000 farms. Historically affected by armed conflict; post-peace-agreement land formalization processes intersect with EUDR land tenure verification requirements.
- **Caldas:** Part of the traditional Eje Cafetero (Coffee Axis). Manizales, Chinchiná, and Palestina are major origins. Mature cooperative infrastructure (Cooperativa de Caficultores de Manizales). Lower deforestation risk due to long-established coffee landscapes and protected areas (Los Nevados National Park buffer zone).

The FNC and Colombia's Coffee Institutional Framework

The Federación Nacional de Cafeteros (FNC) is a private entity with public functions, representing Colombia's coffee growers since 1927. For EUDR purposes, the FNC's institutional infrastructure is highly relevant:

- **Cédula Cafetera (Coffee ID):** A farmer-level identification card linked to farm plots registered in SICA. This can serve as the supplier identification field required by Article 9. Each cédula links to farm location, area planted, variety, and estimated production.
- **SICA (Sistema de Información Cafetera):** The FNC's comprehensive coffee information system containing georeferenced data on over 540,000 farms. SICA holds GPS coordinates of farm centroids and, for many farms, plot boundaries. This is Colombia's single most valuable existing dataset for EUDR geolocation compliance. However, SICA data quality varies — older records may have lower GPS precision (3–4 decimal places instead of the 5+ required), and boundary polygons are not available for all farms.
- **FNC Extension Service (Servicio de Extensión):** Over 1,500 extensionistas (field agents) who visit farms regularly. This network provides a ground-truth verification mechanism that, combined with satellite data, could form a robust MRV (Monitoring, Reporting, Verification) system for EUDR compliance.
- **Almacafé:** The FNC's logistics arm managing dry mills and export warehousing. Almacafé's lot tracking systems can link exported consignments back to cooperative purchase points and, through SICA, to individual farms.

EU Export Flows and Market Share

The European Union is Colombia's largest coffee export destination. Key EU market dynamics:

- **Germany:** Receives approximately 25% of Colombian green coffee exports. Hamburg is the primary entry port. Major importers include Neumann Kaffee Gruppe (via subsidiary Racafé in Colombia), VOLCAFE, and Bernhard Rothfos.
- **Belgium:** Antwerp serves as a re-export hub for coffee entering the broader EU market. Significant volumes are processed in Belgium for distribution across Northern Europe.
- **Italy:** Major destination for Colombian coffee destined for espresso blends. Lavazza, illycaffè, and Segafredo are key buyers. Italy values Colombian washed arabica for its clean cup profile and blend compatibility.
- **Spain:** Growing market for Colombian origin coffee, both commodity and specialty segments.

Total Colombian coffee exports to the EU typically represent 35–40% of the country's annual production of approximately 12–14 million 60-kg bags. At current market prices (C-price plus Colombian differential), the EU-bound volume represents USD 1.5–2.0 billion in annual export revenue — illustrating the economic stakes of EUDR compliance for Colombia.

Deforestation Risk Zones in Colombian Coffee Landscapes

While Colombia's core coffee zones (Eje Cafetero, northern Huila) are long-established agricultural landscapes with low recent deforestation, several frontier zones present elevated risk:

- **Caquetá-Huila border (Amazonian foothills):** Coffee expansion into previously forested areas at lower altitudes. IDEAM's SMCYC (Forest and Carbon Monitoring System) flags this corridor as an active deforestation frontier driven by cattle ranching, with coffee sometimes following as a secondary crop.
- **Putumayo:** Southern frontier department with both coffee production and active deforestation linked to road expansion and colonization.
- **Norte de Santander:** Border department with Venezuela. Deforestation driven by illicit crops and mining. Coffee zones in the Catatumbo region are adjacent to high-deforestation areas.
- **Sierra Nevada de Santa Marta:** Unique high-altitude origin with both indigenous territories and deforestation pressure from encroaching agriculture.

For EUDR compliance, operators sourcing from these higher-risk sub-regions will need to provide more robust satellite evidence and possibly third-party field verification to demonstrate that their specific plots were not deforested after 31 December 2020.

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