EUDR Coffee — LATAM Country Exposure

commodity	coffee
regulation	EU Regulation 2023/1115 (EUDR)
article9_fields	geolocation, supplier_identification, deforestation_free_date, due_diligence_statement
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LATAM Coffee Producers and EUDR Exposure

Latin America dominates global coffee production and is disproportionately affected by the EUDR. The region accounts for approximately 55–60% of global coffee output and an even higher share of EU imports. Four LATAM countries illustrate the range of EUDR exposure levels, compliance readiness, and deforestation risk profiles.

Colombia — Medium Risk, High Readiness

Colombia's EUDR exposure profile is characterized by a large, fragmented smallholder base combined with relatively strong institutional infrastructure for compliance.

- **Farm count:** ~540,000 coffee families across 853,000 hectares in 22 departments
- **Average farm size:** 1.5–2.0 hectares (virtually all below the 4-hectare polygon threshold)
- **EU export share:** 35–40% of annual production (~12–14 million 60-kg bags total)
- **Deforestation risk:** Medium overall. Core coffee zones (Eje Cafetero, Huila highlands) are long-established with low recent deforestation. Frontier zones (Caquetá border, Putumayo, Norte de Santander) present elevated risk. IDEAM reports approximately 171,000 hectares of national deforestation annually (all causes, all commodities), with coffee directly responsible for a small fraction.
- **Compliance readiness:** High relative to peers. SICA provides geolocated farm data for most registered farms. FNC cooperative network covers ~70% of production with existing traceability systems. Cédula cafetera provides supplier identification. IDEAM/SMBYC offers authoritative national deforestation monitoring. Key gaps: SICA GPS precision upgrades needed, polygon mapping incomplete, private-channel traceability (~30% of production) underdeveloped.
- **Expected benchmarking classification:** Standard risk (initial). Potential for sub-national differentiation if the Commission allows regional benchmarking.

Peru — Higher Risk, Lower Readiness

Peru is Latin America's second-largest coffee exporter and faces more acute EUDR compliance challenges than Colombia.

- **Farm count:** ~223,000 coffee families across approximately 425,000 hectares, primarily in the selva alta (high jungle) and ceja de selva (jungle brow) ecological zones
- **Key regions:** Junín (Satipo, Chanchamayo — Peru's largest coffee zone), San Martín (Moyobamba, Lamas, Tarapoto), Cajamarca (Jaén, San Ignacio), Amazonas (Rodríguez de Mendoza, Bagua), Cusco (La Convención/Quillabamba)
- **Average farm size:** 2–5 hectares, larger than Colombia's average, with more farms potentially requiring polygon mapping
- **Deforestation risk:** HIGH. Peru's Amazon deforestation is the highest in the Andean region. The Junín and San Martín departments — Peru's top coffee zones — are also among the country's highest deforestation areas. Coffee expansion into primary forest is documented in Junín (Ene-Apurímac-Mantaro valley), where farmers clear forest for new coffee plantings at lower altitudes. SERFOR (Peru's forest authority) and MINAM (environment ministry) monitoring systems exist but are less mature than Colombia's IDEAM.
- **Compliance readiness:** LOWER than Colombia. Peru lacks an equivalent to SICA — there is no comprehensive national coffee farm registry with GPS coordinates. Cooperatives (e.g., Cooperativa Agraria Cafetalera Pangoa, CAC La Florida) maintain some farm data, but coverage is fragmented. SENASA (national agricultural health service) has some farm registration data, but it was not designed for EUDR-grade traceability. JNC (Junta Nacional del Café) is coordinating national response but lacks the institutional density of FNC.
- **Expected benchmarking classification:** Standard to high risk, depending on the sub-national assessment. San Martín, with its REDD+ program experience, may score better than Junín.

Guatemala — Mixed Risk by Region

Guatemala is Central America's largest coffee producer and a significant EU supplier, particularly to Germany and Belgium.

- **Farm count:** ~125,000 coffee producers across approximately 305,000 hectares
- **Key regions:** Huehuetenango (Highland specialty, 1,500–2,000 masl — very low deforestation risk in established coffee zones), Antigua Guatemala (volcanic soils, historic coffee landscape, minimal deforestation), Cobán/Alta Verapaz (lower altitude, significant deforestation driven by cattle and palm oil — coffee is secondary), Fraijanes, San Marcos, Atitlán
- **Deforestation risk:** Mixed. Highland zones (Huehuetenango, Antigua, Atitlán) are established coffee landscapes with low deforestation. Lowland zones (Petén border, Alta Verapaz, Izabal) have high deforestation driven primarily by cattle ranching and palm oil, with coffee sometimes present as an adjacent crop. Guatemala lost approximately 61,000 hectares of tree cover annually in recent years (GFW data).
- **Compliance readiness:** Moderate. Anacafé (Asociación Nacional del Café) maintains some farm registry data, but coverage and GPS precision are uneven. Guatemala's specialty coffee sector (Huehuetenango, Antigua) has relatively mature traceability through direct-trade relationships. The commodity segment moving through larger fincas and intermediaries has weaker traceability infrastructure. INAB (Instituto Nacional de Bosques) provides forest monitoring, but with less granularity than IDEAM.
- **FPIC considerations:** Significant indigenous population (Maya) in coffee-producing highlands. EUDR legality requirement includes compliance with indigenous peoples' rights and land tenure. Guatemala's complex land tenure history (post-conflict) adds compliance layers.

El Salvador — Low Risk, Specialty Focus

El Salvador is a small but notable coffee producer with one of the lowest deforestation risk profiles in the LATAM coffee sector.

- **Farm count:** ~20,000 coffee producers across approximately 140,000 hectares
- **Key regions:** Apaneca-Ilamatepec (highest-quality zone, volcanic soils), El Bálsamo-Quetzaltepec, Chinchontepec, Tecapa-Chinameca, Cacahuatique. All are long-established shade-grown coffee systems.
- **Deforestation risk:** LOW. El Salvador is one of the most deforested countries historically (only ~12% forest cover remaining), but current deforestation rates are among the lowest in Central America. Coffee in El Salvador is almost entirely shade-grown under existing forest canopy — meaning coffee production actually conserves rather than threatens forests. The Bourbon, Pacamara, and Pacas varieties grown under traditional shade systems make El Salvador's coffee inherently aligned with EUDR deforestation-free requirements.
- **Compliance readiness:** Moderate to high for the specialty segment. CSC (Consejo Salvadoreño del Café) provides institutional coordination. Farm sizes are larger on average (many traditional estates — beneficios), simplifying geolocation data collection. The specialty/direct-trade segment (a large share of El Salvador's small export volume) already has strong traceability. EU export volume is relatively small, reducing the total compliance infrastructure needed.
- **Market access implication:** El Salvador could be an early beneficiary of the low-risk country benchmarking classification, which would confer simplified due diligence and make Salvadoran coffee particularly attractive to EU operators seeking lower compliance costs.

Comparative Risk Matrix

Country	Coffee Farms	EU Export Exposure	Deforestation Risk	Compliance Readiness	Expected Benchmarking
Colombia	~540,000	High (35–40% of production)	Medium (frontier zones elevated)	High (SICA, FNC, IDEAM)	Standard
Peru	~223,000	High (EU major destination)	High (Amazon frontier expansion)	Lower (no unified farm registry)	Standard to High
Guatemala	~125,000	Moderate to High	Mixed (low in highlands, high in lowlands)	Moderate (Anacafé partial coverage)	Standard
El Salvador	~20,000	Low (small volume, specialty)	Low (shade-grown, minimal deforestation)	Moderate to High (specialty traceability)	Low (potential)

Market Access Implications

The EUDR creates asymmetric market access conditions based on compliance readiness. Countries and supply chains that achieve compliance early gain competitive advantage — EU roasters and importers will preferentially source from "EUDR-ready" origins to minimize regulatory risk and compliance costs. This dynamic could reshape coffee trade flows:

- **Premium for compliance:** EUDR-compliant coffee may command a quality-neutral premium as EU operators pay for regulatory certainty. Early estimates suggest a 2–5 cent/lb compliance premium could emerge, especially in the transition period.
- **Supply chain consolidation:** Larger cooperatives and exporters with existing traceability infrastructure will absorb market share from smaller actors unable to meet EUDR requirements. This could accelerate consolidation in Colombian coffee exports.
- **Trade diversion risk:** Non-compliant coffee may be diverted from the EU market to non-EUDR destinations (USA, Japan, South Korea), creating a two-tier market. However, since the EU represents 35–40% of Colombian coffee demand, market diversion is not a viable long-term strategy for major origins.
- **National compliance investment:** Countries that invest in national-level compliance infrastructure (farm registries, satellite monitoring integration, DDS facilitation platforms) will reduce per-farm

compliance costs and maintain market access. Colombia's existing SICA/FNC/IDEAM infrastructure positions it well for this investment.


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Revisión #1
Creado 2026-05-27 05:30:35 UTC por Gideon Blaauw
Actualizado 2026-05-27 05:30:35 UTC por Gideon Blaauw