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ABSTRACT—

Certified organic coffee is a minuscule but important portion of coffee production and trade and is the fastest growing sector in sales revenue. Organic coffee has its roots in sustainable crop production and economic development policy. Latin America has become the center of the organic coffee movement, representing a change from the old market structure of the coffee trade. The U.S. organic coffee market has experienced extraordinary growth in the past five years because of an increase in consumer social and ecological awareness. Latin America supplies most of the organic coffee entering the United States, where Mexico, Colombia, and Guatemala are the main exporters. Colombian and Guatemalan organic coffee, according to the survey, receive the highest price premiums because of the perception of superior quality. Surveyed importers and roasters in the United States believe that the organic coffee market will continue to grow at least for the next 10 years. Oversupply, economies of size, and reduced price premiums are seen as the biggest problems to be faced by organic coffee producers in the coming years.

-----KEY WORDS-----
certified organic, coffee, coffee trade, coffee industry

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1. Introduction

Coffee is grown in nearly 80 tropical and subtropical countries, and after petroleum, has the greatest total value of internationally traded commodities. In 1999 more than 10.5 million hectares – an area larger than Portugal – was used worldwide for coffee cultivation in order to satisfy the needs of hundreds of million of coffee drinkers around the world. The United States is the largest coffee-consuming nation in the world, drinking roughly one fifth of the 6.2 billion kilograms of coffee grown worldwide in 2000. That amounts to approximately 450 million cups of coffee consumed each day, making coffee, at $2.3 billion, the number one food commodity imported by the United States (FAO, 1995-2000).

Certified organic coffee makes up a minuscule portion of overall coffee production and trade. However, sales of certified organic coffee are currently growing faster than any other type of specialty coffee (organic and gourmet coffee differentiated by quality attributes associated with origin and growing conditions) though organic coffee still represents only 1 to 2% of the $5 billion specialty coffee market (WRI, 1999). Growers produce certified organic coffee on more than 205,000 hectares distributed throughout 15 countries. Data collected in 1996 and 1997 show substantial growth globally -- a 54% increase in the certified organic coffee area (ICO, 1997).

Organic coffee has its roots in biodynamic agriculture which is sustainable crop production where crop inputs are provided by the ecosystem as opposed to unnatural means involving synthetic inputs. In recent years, Latin America has been in the center of the organic coffee movement which represents a type of economic and social restructuring at the producer level, drawing upon and developing linkages beyond the traditional boundaries of how coffee is produced and traded. In the span of five to ten years, the organic coffee industry in Latin America has carved out a potentially significant space not only in the organic coffee sector but also in the coffee market as a whole in the United States (Rice, 2001).

There is a need for “basic intelligence” on the organic sector to understand fully its magnitude and potential. In this paper, the foundation for the organic coffee industry, is presented -- encompassing a detailed definition of organic coffee and the relevant economic factors and market structure to include the elements of supply and demand. The current state of the organic coffee sector in Latin America and in the United States is examined. Finally, drawing upon interviews conducted, the involvement of Latin America, by country, in the U.S. organic coffee market and prospects for the future are discussed.

2. Organic Coffee

2.1 Definition

Organic coffee is grown without manufactured chemical contact of any kind. Many U.S. states regulate organic coffee, and the USDA plans to enforce additional regulation under the U.S. Organic Food Production Act. Organic coffee must come from independently certified farms, be purchased by certified importers, and roasted by certified roasters to maintain the product’s integrity. At each step in the processing chain, audit trails that track the coffee beans as they move from source to cup are demanded of those who handle or process the product (USDA, 2000).

The International Federation of the Organic Agriculture Movement (IFOAM, 1996) considers that a crop can qualify as organic only when it can be proved that active use has been made of various organic production techniques such as:

- Terracing, contour planting, soil covers, and mulching to prevent erosion.
- Increase of organic matter by using legumes or shade-tree residues.
- Soil activation by correcting the pH (degree of acidity).
- Use of clones or seedlings resistant to pests and diseases.
- Regulation of the microclimate and improvement of the ecological diversity to control pests and diseases.
- Return of nutrients removed by using a mineral balance calculation.

For small-scale farmers, the transition to organic practices is often relatively straight forward since many cannot afford expensive chemical inputs in the first place

and most can immediately recognize the benefits of the premium price for organic coffee once it is certified. Nonetheless, the cost for certification is expensive but can be mitigated through joint ventures via farmer cooperatives (Bray, 1997).

Credibility in the market place is critical to the success of this kind of initiative. Because organic coffee is marketed as differentiated from other beans without reference to physical attributes, there must be a way for consumers to verify the claims of companies selling coffee labeled organic. The most widely used way of ensuring organic claims is through third party certification. Third party certifiers have evolved to audit and verify claims of organic producers using various related sets of criteria. As the market for organic products continues to grow, a consolidation of labels is underway. Respected organizations such as the Organic Crop Movement Association (OCIA), Farm Verified Organic, Eco-OK, and the Demeter Association are certifying organic coffee (Dicum and Luttinger, 1999).

As previously indicated, the cost to become certified can be expensive. OCIA, the world's largest independent organic certification organization, charges a $250 yearly membership fee plus the cost of yearly inspection ($400 to $500). Additionally, there is a "privilege user fee" of 0.5% of the sale price for use of the organic-certified label. Because an average OCIA certified coffee cooperative might have 250 to 300 small-scale growers, the fees per farmer are modest. For large cooperatives, however, the privilege user fee can add up to thousands of dollars each year although usually compensated easily by the market premium for certified organic coffee. The OCIA indicated that the number of companies becoming certified increased 40% in the year 2000 (Rice, 2001).

2.2 Sociopolitical and Economic Factors Responsible for the Organic Coffee Industry

There are five factors contributing to the increasing production of organic coffee:

- The high cost of agricultural chemicals, a large portion of which are imported.
- The reduced cost of production for some organic products.
- An attractive price for producers due to the "premium" paid for organic commodities.

- Increasing consumer demand for healthy foods.
- The growth of environmental awareness in the world (ICO, 1997).

There is also a growing movement in certain sectors of the coffee industry in Latin America against "technified" systems in the production of coffee. The term, "technified," usually means the use of high yielding varieties that grow best in partial or full sun and demand the use of added chemicals (Dicum and Luttinger, 1999). According to the UN Food and Agriculture Organization (FAO), sun or reduced shade systems account for as much as 68% of Colombia's and 40% of Costa Rica's permanent cropland planted in coffee. About 40% of the 2.8 million hectares planted in coffee in Mexico, Colombia, Central America, and the Caribbean through the early 1990's has been converted to the "technified" system (FAO, 1995-2000).

Consumers in the United States and around the world are also choosing more "green" or organic products. The number one reason is quality. U.S. consumers are one of the largest environmental groups by virtue of product choice where the organic market is totally consumer driven (Gorman, 1999). Organic coffee is especially important in cause related marketing, one of the hottest trends today. There is an S.O.S. trend occurring now -- consumers want to "Save our Society." Consumers are demanding changes, just tasting good or being a quality product isn't enough (Tiffen, 1998). In a poll conducted by the Specialty Coffee Association of America, 89% of those surveyed indicated that the reputation of a company influenced their buying decisions. People want to feel good about what they are buying (Gorman, 1999).

3. Supply Response and Consumer Demand in the Organic Coffee Market

Supply response in the organic coffee sector is slow. Small farmers, responsible for most of the organic coffee production, continue producing even when prices are very low and may even increase production to maintain income. Further, they are cushioned from short-term declines in world coffee prices by the premiums paid for organic coffee. When prices rise, small farmers cannot quickly increase production. New coffee plants take at least five to six years to come into full production. Thus, the biological lag in

supply response to long-run price increases is around five to six years while a collapse in prices may have a negligible impact on supply (Wheeler, 2000).

In many countries organic coffee is a luxury. Consumption per capita tends to be highest in countries with high per capita incomes such as Scandinavia, the Netherlands, Germany and Japan (Wheeler, 2000). In the United States organic coffee has an air of luxury about it as a gourmet item. As such, price volatility has little effect on the per capita consumption of organic coffee (ICO, 1997).

4. Organic Coffee Industry in Latin America

Throughout history many of Latin America's economies have been based in agriculture, coffee being the most important export for many countries of Central and South America. As figure 1 shows, in most Central American countries (Guatemala, El Salvador, Nicaragua, and Honduras) coffee represents between 20 and 30% of their total exports.

In terms of production in Latin America, a mixture of small growers scattered across remote and rugged landscapes within the tropics forms the base for much of the world's production. They produce coffee on their own plots and often work as day laborers on larger holdings (Dicum and Luttinger, 1999). While the proportion of coffee produced by small growers in specific countries is sometimes dwarfed by that produced on larger farms, smallholders dominate production of certified organic coffee. Even so, Latin Americans produce the bulk of certified organic coffee. Moreover, production and marketing cooperatives form the backbone of production and trade in organic coffee (Rice, 2001).

A recent trend in the Latin American coffee sector has been the modernization or technification of production (Rice and Ward, 1996). Trade has long been in the hands of local elites (Williams, 1994). Those interests in control of conventional production and trade traditionally have shown neither concern for the ecological consequences of production nor for equity within the commodity chain. Most recently, with the spread and acceptance of open-market economics across Latin America, concerns for small producers or the land upon which they base their production are not reflected in a free

market (Rice, 2001). Small growers choosing to "go organic" not to benefit the planet or because of some agroecological incentive. Rather, organic methods represent a path toward increased profitability without dependence on expensive inputs (Bray, 1997; Rosset and Altieri, 1997).

A survey of the various certification agencies around the world yielded data on the number of hectares of certified organic coffee at the global level. Some 16 different certification agencies reported a total of 205,686 hectares of coffee in 15 countries (Rice, 2001). As table 1 shows, Latin America accounts for the lion's share of certified organic coffee production with more than 86% of the global area. Mexico leads the world in certified organic coffee production with more than 93,000 hectares. The yields vary greatly from grower to grower, region to region, and country to country, but for those countries for which data are available yields average 505 kg/hectare which is just under the FAO's reported world average for all coffee (Rice, 2001).

The major certifiers are based in the United States and Europe even though some, such as the Organic Crop Improvement Association (OCIA), have chapters in coffee producing countries in Latin America. In recent years, locally based national certification agencies have formed in several countries. Groups located in Colombia, Bolivia, Peru, and Nicaragua have joined to form a regional network called BioLatina which aims to harmonize details of organic standards and coordinate programs, thus adding credibility to local efforts from the perspectives of importers (Neuendorff, 1997). With the cost of organic certification being a major obstacle for small farmers, the growth of local organic agencies will serve to alleviate this barrier. IFOAM supports the formation of in-country certifiers (Rice, 2001).

Mexico

Mexico is the fourth largest coffee producer and is the world's leading supplier of certified organic coffee. Some 90% of all coffee farms in the country are five hectares or less in size, and the majority are owned by indigenous people. However, the future of these smallholdings and the nation's title as the world's leading organic coffee producer is unclear (Dicum and Luttinger, 1999). Mexico aims to surpass Colombia in coffee

production primarily by converting most of its traditional shade farms to high yielding, agrochemical dependent, and sun tolerant plantations (Murphy, 1995).

Mexican organic coffee production for the crop year 2000/2001 is estimated at 350,000 60 kg bags. Some 50% of the production is exported to the United States and 35% to Swiss marketers (USDA, 2001a).

Guatemala

The interest in farming organic coffee is increasing in Guatemala because of the premium for organic coffee above the regular price of coffee which can be as much as 99 cents per kilogram (ANACAFE, 2000). Organic coffee produced in Guatemala can be classified as prime washed, extra prime washed, hard bean, and strictly hard bean. Strictly hard bean is produced at high altitudes while prime and extra prime are produced in the lower altitude coastal areas. Hard bean coffee is produced in the lower altitude mountain areas and higher altitude coastal areas. In the past few years more areas of strictly hard bean have been produced while fewer areas of prime and extra prime have been produced. This is because of relative prices and in the coastal areas because of more profitable alternative crops such as bananas, palm, and rubber (ANACAFE, 2000).

The largest organic certifier in the world is the Organic Crop Improvement Association (OCIA) which is organized into regional chapters, one of which is located in Guatemala. OCIA's Guatemala Chapter has 17 members, most of whom are coffee growers (ANACAFE, 2000).

According to the Guatemalan National Association of Coffee Growers (ANACAFE), Guatemala's organic coffee production is estimated for the crop year 2000/2001 at 225,000 60 kg bags. Guatemala's registered organic coffee production accounts for 5% of total production. This is the same level as in the previous crop year, 1999/2000, because of the lag in the time needed for registration and for new organic plants to start bearing fruit. The United States is Guatemala's most important customer, accounting for 40% of total Guatemalan organic coffee exports. Germany, Japan, the Netherlands, Sweden, and Belgium round out the other top five export destinations (USDA, 2001b).

Colombia

The Colombian Coffee Federation has been working with the U.S based organization, Conservation International, to explore the organic and shade systems of coffee production. Currently, less than 1% of Colombia's production is organic, but large areas of new planting are underway (Dicum and Luttinger, 1999).

The world price of Colombian coffee reached a record high of $6.14 per kilogram in May 1997, which included a premium of $0.37 for quality (USDA, 2001c).

Some 35% of all Colombian coffee exports went to the U.S. market while 42% went to the European Union in the year 2000. According to the National Coffee Committee (NCA), Colombia's production of organic coffee for the crop year 2000/2001 is estimated at 80,000 60 kg bags (USDA, 2001d).

Brazil

Organic farming is growing rapidly in Brazil, although from a very small base mostly in the southern regions. Information that exists is quite sparse, not organized, and in most cases non-existent for some products. There are about eight organizations involved in the certification of organic products in Brazil, but only the International Federation of Organic Agriculture Movement recognizes the Biodynamic Institute of Rural Development. Another major Brazilian organization is the Association of Organic Agriculture (AAO) located in Sao Paulo (USDA, 1999).

According to the Brazilian Organic Coffee Association (ACOB), Brazilian organic production is estimated at 40,000 60 kg bags for the crop year 2000/2001, up 17,000 bags from the previous crop year. Organic coffee production for the crop year 2000/2001 is estimated to be at 60,000 60 kg bags. Organic products represent a growing niche market in Brazil and beyond. Most Brazilian organic production is exported primarily to Japan and Germany. Currently there are eight Brazilian coffee roasters producing organic ground coffee (USDA, 2001e).

According to the Brazilian Coffee Industry Association (ACIB), many medium and large roasters have offered different ground coffees to domestic consumers in the past couple of years such as gourmet, organic, and decaffeinated. Upscale consumers are willing to pay a premium price for such products (USDA, 2001e).

Peru

As with most Peruvian agricultural producers, coffee producers face two major constraints. First, there is credit rationing as private banks do not accept farmland as collateral, and there is no official government lending institution. Most farmers obtain loans from coffee buyers at consequent high interest rates encompassing a sales contract with a set price for coffee. Second, during the land reform of the 1970's, land was divided into small plots, making it extremely difficult to efficiently manage coffee production, harvesting, and processing (USDA, 2001f).

The quality of Peruvian coffee is improving. In 2000, the New York Coffee, Sugar, and Cocoa Exchange (NYCSCE) reduced the discount applied to Peruvian coffee from nine cents per kg to only two cents per kg (USDA, 2001g). Because coffee grows in the coca producing areas, there have been some efforts by international aid agencies to provide technical assistance to produce and market coffee as an "alternative crop" to coca. Organic coffee production, in particular, has been targeted. According to the U.S. Department of Agriculture, there are about 10,000 hectares planted with production at about 102,000 60 kg bags with a yield of 10.5 60 kg bags per hectare (USDA, 2001f).

Costa Rica

Costa Rican coffee production is concentrated mainly in the central highlands. In recent years there has been movement towards increasing production of organic coffee. Cococafé, a fair trade organization in Costa Rica, is planning to produce only organic coffee beans by 2002. The decision, which will affect 3% of Costa Rica's coffee production, was made as part of a long-term economic and marketing strategy, based on financial, environmental, health, and safety considerations (Garcia, 1998). According to the Costa Rican Coffee Institute (ICAFE), Costa Rica's production of organic coffee for the crop year 2000/2001 is estimated at 40,000 60 kg bags (USDA, 2001g).

El Salvador

Organic coffee exports have become a major focus in El Salvador. The main reason is premium prices to growers. Salvadoran coffee exporters have created an

association called, Itzalco, which is the promotion arm targeting specialty coffee fairs in the United States and Europe. Itzalco received a grant from the EU to develop non-traditional exports from El Salvador. Currently such exports are small in volume accounting for approximately 1% of total coffee exports. El Salvador's organic coffee production for the crop year 2000/2001 is estimated at 60,000 60 kg bags (USDA, 2001h).

The Cooperative League of the United States (CLUSA) has been assisting a group of Salvadoran coffee coops to develop a market for organic coffee. Thus far, their primary market has been Japan (Kuehn, 1996).

Ecologically friendly coffee planting is on the rise in El Salvador. Salvanatura, a local environmental nongovernmental organization, is actively promoting a program called, ECO-OK. Under this pilot program, farms that harvest coffee in shaded areas are rewarded for oxygen release and preservation of the environment (Kuehn, 1996).

Ecuador, Honduras, and Nicaragua

Ecuador's organic coffee production is estimated at 5,000 60 kg bags for the crop year 2000/2001 (USDA, 2001i). Honduras' production for the same period is estimated at 3,000 60 kg bags, while that of Nicaragua is estimated at about 2,500 60 kg bags (USDA, 2001j and k). Reportedly, the quality of the 2000-2001 Honduran crop is much improved over that for the previous crop year. In fact, the Honduran Institute of Coffee (IHCAFE) reported that several demanding European customers have praised their Honduran suppliers for noticeable improvement in quality, though not necessarily reflected in prices to Honduran growers (USDA, 2001j).

5. The U.S. Organic Coffee Market

Over the last few decades, growing public interest has helped to catalyze a consumer movement embracing organically produced commodities and products. Consumer demand continues to swell for products grown and processed in a socially responsible manner guided by ecological principles. The organic food industry has been

growing at a rate of 20 to 25% per year, while the food industry, as a whole, grows at only 3 to 5% annually (Goodman, 1999).

A primary offshoot from the rise in consumer consciousness has been the rising demand for organic coffee. Like the specialty coffee industry and the roast and ground coffee market before it, environmentally friendly coffee is currently undergoing a period of growth (Dicum and Luttinger, 1999).

Organic coffee fits within the larger specialty coffee market in the United States which grew from $45 million in retail sales in 1969 to $1.9 billion in 1990. In the United States, certified organic coffee volume accounts for about 3% of all specialty coffee imported (Gorman, 1999).

The share of certified organic coffee within the specialty coffee market in Europe is similar to that of the United States. Organic coffee represents 5% of the specialty coffee market with an increase of about 15% a year. This trend may continue for years to come as eastern European countries become incorporated into the organic movement (FAO, 1998).

During the first half of the 1990's, there was substantial growth for certified organic coffee in the U.S. market. A survey in a previous study by Rice (2001) focused on eleven coffee importers who handle organic coffee, gathering data on volume and sales of certified organic coffee channeled through the companies. The data show that between 1991 and 1999, the average increase in the proportion of sales attributed to organic was 136%. Total volume imported by all surveyed importers combined climbed from 1 million kg in 1991 to 3.3 million kg in 1999, an increase of almost 243%. The survey data revealed that in 1991, certified organic coffee accounted for 23% of the volume and 17% of total sales for the importers. By 1999, certified organic sales and volume had risen to 34% of total coffee sales and volume of the surveyed firms. Such improvement stands as a testament to growing demand and better quality control (Rice, 2001).

Certified organic coffee sales estimates for 2001 in the United States based on the Specialty Coffee Association of America (SCAA) and other organic sources are between $75-125 million (200,000 60 kg bags) with similar estimates reported for Europe (Griswold, 2001). By the end of the 1990's large companies were adopting organic

brands. For instance, Procter and Gamble, under the Millstone brand, began offering organic coffee nationwide in the summer of 1998 and sales immediately exceeded expectations. Peet's Coffee and Tea is another company making organic coffee available in May of 1998. An extensive search for a perfect blend of organic coffee resulted in their Gaia blend that has sold extremely well in the company's 40 stores. And nationwide coffee retail stores like Starbucks also have their own blends of organic coffee (Dicum and Luttinger, 1999).

According to market analysts, the organic coffee drinker demographic profile now closely mirrors the gourmet, natural foods customer profile. The typical organic coffee consumer is married, college educated, 35-45 years of age, with a household income of $60,000, and is likely to live in a west coast city (Gorman, 1999).

6. U.S. Importer Survey Results

From March through June 2001, a telephone survey was conducted of U.S. specialty coffee importers/roasters. Some 76 companies were selected for the survey based on a listing provided by the SCAA. Only 13 of the 76 firms were found to import organic coffee, all of which source their needs from Latin America, table 2. The small number of companies importing organic coffee is because of the small size of the market and because of long-term exclusive relationships most organic coffee producers and cooperatives have with a particular importer.

The importers were asked key questions for a greater understanding of the U.S. organic coffee market and sourcing of supplies. The questions encompassed important sourcing locations, pricing, short and long-run expectations about the U.S. organic coffee market.

All of the respondents in the survey reported sourcing organic coffee in Guatemala, 92% reported sourcing in Mexico, 85% in Colombia, 15% in Costa Rica, and 8% each in Brazil, El Salvador, and Peru. When asked to rank the top three source countries, 85% of the respondents indicated Mexico as the top source of organic coffee and 75% ranked Guatemala as number two and Colombia as number three.

Other countries ranked as the top source of organic coffee were Costa Rica and Guatemala, each by 7% of the respondents. Other countries ranked number two where Brazil, Colombia, and Mexico, each by 8% of the respondents. Other countries ranked number three were Guatemala and El Salvador by 17% and 8%, respectively, of the respondents.

All respondents reported that organic coffee is priced relative to the price of conventional coffee. Organic coffee garners a premium above the price of conventional coffee where the premium depends on the country of origin, table 3. As can be seen, the largest price premiums are for organic coffee from Colombia, Costa Rica, and Guatemala, reflecting the quality attributes of mountain-grown coffee.

An inverse causal relationship could perhaps be inferred between the price premium and volume of organic coffee entering the United States based on the survey results for Mexico, Colombia, Costa Rica, and Guatemala. Another explanation for Mexico's high volume is perhaps because of timing and proximity.

Mexico developed its organic coffee sector much earlier than the rest of the countries in Latin America. Organic coffee grower cooperatives have been established in Mexico since the late 1980's with Chiapas as the epicenter of the movement (Bray, 1997). This fact in conjunction with Mexico's proximity to U.S. markets may explain the higher presence of Mexican organic coffee in the United States.

Finally, the respondents were asked their opinions about the growth potential of organic coffee production over planning horizons of five and ten years. All respondents expected U.S. consumer demand to cause organic coffee production to rise more than 20% per year at least over the next ten years.

7. Conclusions and Implications

For the foreseeable future, strong U.S. consumer demand is expected to foster continued premium prices for organic coffee according to the survey participants. As a result, the opportunity for growth is expected to continue for organic coffee producers and exporters. Given the present pattern of production in Latin America, the source of

most organic coffee, the growth opportunities should be substantial for organized small producers for some time.

Although the overall picture looks positive, some potential risks should be borne in mind regarding the future of the organic coffee business. For example, oversupply may have both immediate and long-term negative effects. Reduced price premiums for organic coffee and insufficient profitability for growers can lead to ruin. Further, though Latin America growers are doing relatively well with premium prices, in general, they lack technical know-how in farming and production methods and market savvy, for example, products to grow, markets and distribution channels, competitors and market access. Grower groups attempting production and marketing inroads often find stumbling blocks within the conventional frameworks of Latin American governments (Rice, 2001).

Technical assistance directed at conventional coffee production virtually ignores the organic sector. In fact, many government mechanisms that traditionally provided assistance to growers have been dismantled or have lost support in recent decades (Tiffen, 1998). Small producers without technical and marketing expertise run prey to the persuasions of chemical company representatives promoting expensive input-based production (Kuehn, 1996).

Producers in all source countries face the common challenge of organic certification, providing the guarantee demanded by importers, food manufacturers, retailers, and consumers. Because of the expense of certification, producers, largely small landholders, are driven to unite in a cooperative manner in order to spread the cost over several members.

Though the future of the organic coffee trade appears to be positive, as can be seen, there are many challenges to be faced. Entrepreneurial spirit aside, success over the long run will depend on the quality of continuing education and market intelligence received by the organic coffee producers.

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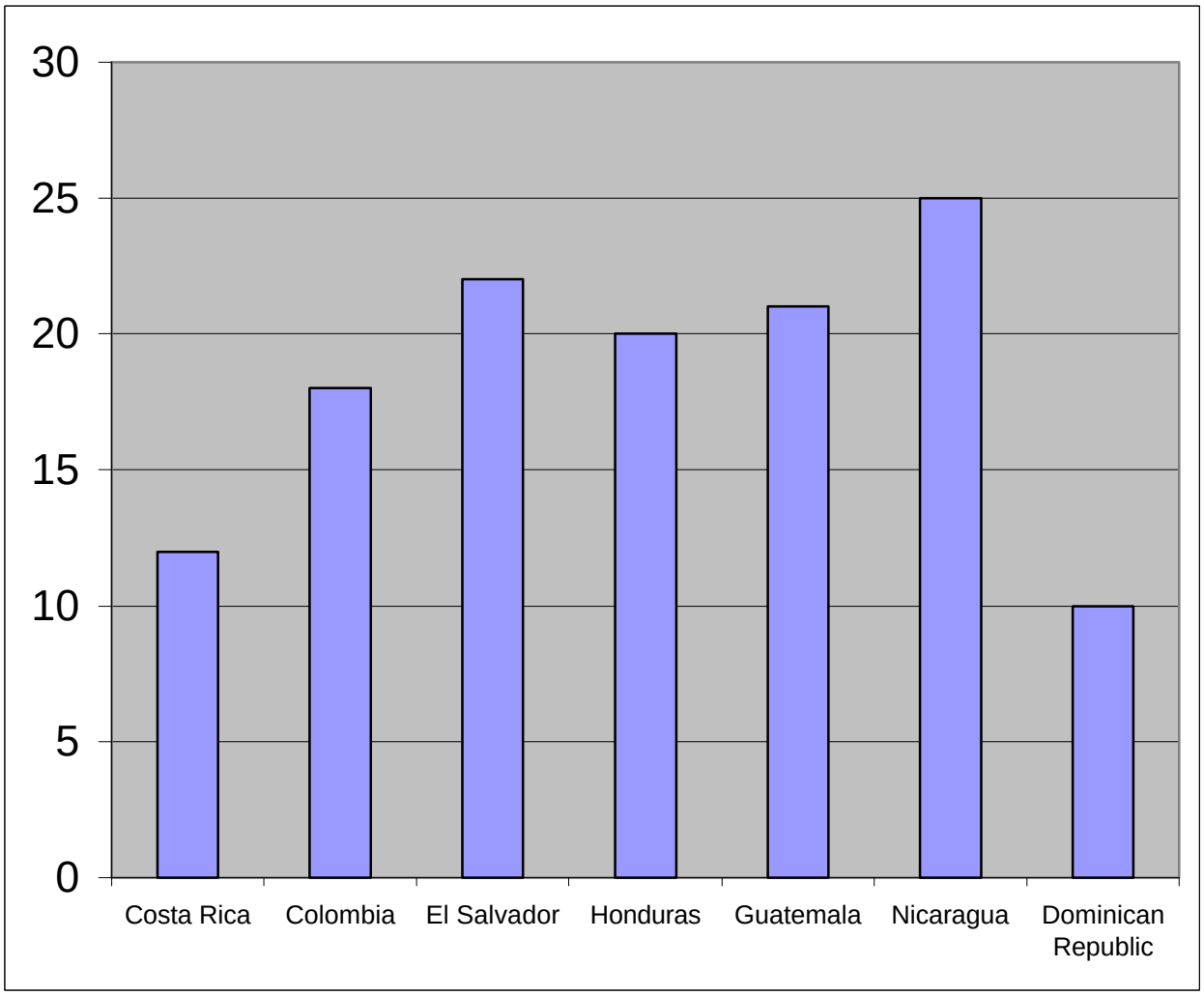
8. Tables and Figures

Figure 1. Percentage of export earnings from coffee



Source: FAO, 2000

Table 1. Certified Organic Coffee Area, by Country (1999/2000)

Country	Hectares
Mexico	93,039
Peru	37,633
Indonesia	26,882
Ecuador	12,381
Nicaragua	10,116
El Salvador	9,441
Guatemala	7,895
Bolivia	2,528
Brazil	2,100
Colombia	1,332
Dominican Republic	852
Cameroon	700
Papua New Guinea	500
Costa Rica	271
Sri Lanka	16
Total	205,686

Source: Survey of certification agencies conducted by Rice, 2001.

Table 2. Companies Importing Organic Coffee into the United States

Company	U.S. Headquarters
Equal Exhange	Canton, MA
American Coffee Corporation	New York, NY
Mitsubishi International Corporation	New York, NY
Royal Coffee New York	Staten Island, NY
Rothfos Corporation	White Plains, NY
The Coffee Bean Trading Co. USA, Inc.	Miami Lakes, FL
Jamaican House Coffee USA Inc.	Lauder Hill, FL
Blaser & Wolthers Specialty Coffee	Plantation, FL
Costa Rican Coffee Company	Tempe, AZ
Dona Mireya Estate Coffee	Pasadena, CA
Sustainable Harvest Coffee Co.	Portland, OR
San Cristobal Coffee Importers	Kirkland, WA
Organic Products Trading Co.	Vancouver, WA

Source: Survey of U.S. specialty coffee importer/roaster companies.

Table 3. Organic Coffee Premiums Paid Above Conventional Coffee Prices by Latin American Country.

Country	Premium (U.S. cents/kg)
Mexico	44 to 77
Guatemala	77 to 110
Colombia	77 to 110
Costa Rica	77 to 110
Brazil	22 to 44
El Salvador	22 to 44
Peru	11 to 33

Source: Survey of U.S. specialty coffee importer/roaster companies.