# COFFEE BARO-METER

## Germany in focus

2026

# Coffee Barometer 2026

## Germany in focus

**Contents**


1 **Introduction — 3**
2 **The coffee sector in Germany — 7**
3 **Assessment of the main coffee companies in the German market — 19**
4 **Reflection — 31**
5 **Conclusion — 37**
6 **Annex: Company Assessments — 41**

List of abbreviations — 65
Endnotes — 66
Sources of figures — 66
Bibliography — 67
Imprint — 68


This Germany–focused report builds on the *Coffee Barometer 2026* and applies its lens to a single country whose importers, roasters and retailers shape much of Europe's coffee trade. Through their purchasing power, they influence how coffee is produced and traded worldwide. Where the global edition examines the state of sustainability across the sector, this report brings the same approach to a single national market to stimulate the debate in Germany among companies, policymakers and civil society. Both reports are a joint effort of Conservation International, Solidaridad and VOCAL. The Ethos Agriculture team led the research, coordination and writing.

Reading guidance: Readers can use this report on its own. Those seeking a broader picture of market developments and sustainability across the sector can turn to the corresponding sections in the Coffee Barometer 2026.


**Sjoerd Panhuysen & Frederik de Vries**



**For decades, Germans have bought their coffee cheaply and come to expect nothing else.**

# 1



# Introduction

Coffee is part of the morning routine and the office break, but few people wonder where it comes from. Supermarkets stack coffee near the entrance, change its price almost every week and use it to draw grocery shoppers into the store. Roughly half of all packs sold in German supermarkets leave the shelf on promotion (BASIC 2024). Shoppers have learned the routine: a 500-gram pack costs a few euros, and when the price goes up, they wait for next week's offer.

In recent years, world coffee market prices climbed to record highs before falling back. By spring 2025, the cheapest own-label ground coffee in German supermarkets cost €5.49, compared with €2.99 for the same 500 gram pack in early 2022 (Verbraucherzentrale 2025). Some retailers began cutting their prices in 2026 as green coffee became cheaper. Even so, by June 2026 the average price of roasted coffee in Germany was 53% higher than in early 2020. Price competition has become so fierce that it has ended up in court. Tchibo sued ALDI Süd, alleging that it sold its own-label coffee below production cost during promotion weeks in 2023 and 2024. The courts have so far sided with the discounter, and the case is now before to the Federal Court of Justice (Solmecke 2026).

The promotions have not disappeared. In 2026, 85% of Germans stock up on coffee when it is on offer, while most keep one to three packs at home as a reserve (Tchibo 2026). Consumers have also kept drinking coffee despite the higher prices. Roasted coffee sales fell by just 1.5% in 2025, while whole bean coffee reached a record high

COFFEE BARO-METER 2026
See Chapter 1

COFFEE BARO-METER 2026
See Figure 7

volume and out-of-home consumption hit an all-time high (DKV 2026). Meanwhile, the large roasters report strong sales and profits. For instance, JDE Peet's, which generated 9% of its global revenue in Germany in 2024, increased global sales by 15.3% in 2025, driven mainly by higher prices. From the supermarket aisle to company balance sheets, the German coffee business can therefore look remarkably healthy and profitable.

That impression hides a more troubling reality in coffee-producing countries. Today's higher prices have brought some farmers relief, but they have not repaired the foundations of coffee production. Many coffee smallholders still live in poverty, because coffee farming does not provide a viable livelihood. Only in Brazil and Vietnam do average farm incomes consistently exceed living income levels. Margins remain thin as the cost of fertiliser, labour and energy rises, while a rapidly changing climate makes coffee harder to grow. **Farmers also contend with ageing trees, pests and plant diseases, and often rely on pesticides to protect their harvests. Many struggle to cover the cost of production, let alone invest in the farms on which their livelihoods and future supply depend**

Labour is the largest cost in coffee production, and much of it goes unpaid. Farming families effectively subsidise the production of coffee. Their unpaid labour adds around 10% to the true cost of a pack of coffee sold in Germany: a cost that traders, roasters and retailers do not pay **(See figure 7)**

Germany is Europe's largest coffee market and one of the world's main trading and roasting hubs (ECF 2026). Few other countries have more influence over how coffee is bought, priced and sold. German-based trading houses handle large volumes of green coffee entering Europe. Germany's roasters, from multinational groups and family-owned firms to hundreds of small specialty roasteries, turn it into the beans, ground coffee and capsules sold at home and across the continent.

For years, voluntary standards have shaped sustainability efforts in the German coffee sector. Yet neither awareness, nor voluntary standards have changed the basic economics of the German coffee market. Certification standards such as Fairtrade, Rainforest Alliance, 4C and organic set requirements for how coffee is grown and traded, and independent auditors check compliance. Yet their reach remains limited: only about a fifth of the coffee sold in Germany carries a certification label (DKV 2025). Rather than expanding independent certification, companies are increasingly turning to their own sourcing programmes, setting and monitoring their own requirements. **The Coffee Barometer 2026 traces the development of voluntary standards, their impact and market significance, and the challenges they face.**

COFFEE BARO-METER 2026
See Chapter 2

Regulation is now adding a mandatory floor. Since 2023, Germany's Supply Chain Act (LkSG) has obliged large companies to identify and address human rights and environmental risks linked to their supply chains. Since September 2026, the EU's Empowering Consumers Directive (EmpCo) has restricted vague or unsubstantiated sustainability claims to curb greenwashing. From December 2026, the EU Deforestation Regulation (EUDR) will require large operators to trace coffee back to land that meets its deforestation-free requirements. **From 2029, the EU's Corporate Sustainability Due Diligence Directive (CSDDD) will require large companies to identify, prevent and address the human rights and environmental harms linked to their supply chains.**

COFFEE BARO-METER 2026
See Chapter 2

Partly in response to these rules, roasters, retailers and traders are working more actively with government agencies, industry associations and civil society on farmer incomes, human rights and climate resilience. Some companies invest in farmer training, longer-term sourcing relationships and climate projects. **Run in isolation and often disconnected from procurement decisions, these projects have delivered few sector-wide benefits and little structural change.**

COFFEE BARO-METER 2026
See Chapter 1

The mass market still runs on price. Retailers use cheap coffee and constant promotions to win shoppers, while roasters compete fiercely for shelf space and volume. Individual companies may recognise the need for better farmer incomes and more sustainable production practices, but none want to carry the cost alone and lose out to competitors that do not. The question that runs through this report is whether Germany's leading roasters and retailers will turn their influence into leadership.

To find out where companies stand on sustainability, we examine what they disclose. We review the sustainability and annual reports, websites and policy documents of six major roasters: Tchibo, JDE Peet's, Dallmayr, Melitta, J.J. Darboven and Nestlé. As well as the five retail groups that account for most of Germany's coffee market: EDEKA, REWE, Schwarz Group (which owns Lidl) and ALDI Nord and ALDI Süd. We rely only on publicly available information. When a company discloses little about its sourcing practices or its investments at origin, that silence tells its own story about what it chooses to make public.

We assess these disclosures against a set of basic expectations. First, on transparency, what do companies say about where their coffee comes from and how much of it meets specific sustainability standards? Second, on procurement, do they disclose what they pay, how they address living income in practice, and how they measure and close income gaps? Third, on the environment: how specific are their climate commitments, how do they plan to decarbonise their supply chain, and what support do they offer farmers to adapt?



**Germany, a heavyweight in the global coffee sector, is well placed to show that sustainable coffee makes good business sense.**



# 2

# The coffee sector in Germany

Germany combines a large consumer market with major import infrastructure, a substantial roasting industry and significant trade flows to the rest of Europe. What happens in Germany therefore reaches well beyond German coffee cups: its purchasing decisions, business practices and sustainability initiatives help shape the wider sector. Yet this influence comes with dependence. The German coffee industry relies on millions of smallholder farmers who face rising costs, incomes that often fall short of a decent living, and a changing climate that makes coffee harder to grow. Fostering sustainability is therefore essential to the long-term resilience and competitiveness of Germany's coffee industry.

Securing future supply means sharing value more fairly: paying better prices and doing more to reduce the risks farmers face. Companies need to take the initiative, think long term and develop a clear sustainability vision that shapes how they buy coffee and where they invest across their supply chains. In practice, this means to take greater risks and to scale up approaches that help farmers earn a living income, invest in their farms and adapt to climate change.

This chapter first describes the structure of the German market and then briefly sketches the sustainability initiatives that German companies, government and civil society have developed.

## The traders

In 2025, Germany handled about one million tonnes of coffee imports, accounting for a third of all EU imports (ECF 2026). Brazil and Vietnam alone supply more than half of Germany's green coffee imports (Figure 1). Most of this arrives in Hamburg and Bremen, port cities that have traded coffee for centuries. These cities are home to Neumann Kaffee Gruppe (NKG), the world's largest green coffee trader, as well as Hacofco and other trading houses of varying size. Their role is less visible than a roaster's brand, but no less consequential. They buy coffee from exporters, cooperatives and estates in producing countries, often pre-finance harvests and hedge against price swings on futures markets. They then grade and blend lots to roasters' specifications and organise shipping, storage and delivery. They connect farms to roasters, and their contracts and quality requirements set the terms on which coffee moves through the chain and reaches the European market.



## The roasters

Germany ranks among the world's largest exporters of roasted coffee. German plants produced about 517,000 tonnes of roasted coffee in 2024, the latest year for which figures are available (ECF 2026).[1] The large roasteries cluster in Hamburg and Bremen, and in Berlin, where tax incentives drew industry investments (Bode and Burdack 2024). Germany imports roasted coffee as well, particularly from Italy and Switzerland (Destatis 2025). In 2025, Germans consumed about 456,000 tonnes of roasted coffee, slightly less than the year before, while consumption outside the home reached a record 125,500 tonnes (DKV 2026).

A small group of long-established companies still dominates the mainstream coffee market.[2] Tchibo, Melitta, Dallmayr and Darboven are German family-owned businesses, while Jacobs is part of JDE Peet's, which was recently acquired by US group Keurig Dr Pepper. Alongside these established names, international companies have long had a strong presence in Germany through brands such as those of Nestlé, Lavazza and illycaffè.

## The retailers

A real shift, however, is taking place in the retail sector. Retailers increasingly compete for coffee shoppers through shelf space, promotions and own-label brands pricing. This is part of a wider transformation of German grocery retail. Five groups – EDEKA, REWE, the Schwarz Group (owner of Lidl) and ALDI Nord and ALDI Süd – now account for about three-quarters of food retail (Petto 2025). Coffee has become one of retail's most important promotional products, with roughly half of all packs sold at a discount (BASIC 2024).

The boundaries between roasters and retailers are blurring. Most grocery groups, EDEKA, Schwarz Group, ALDI Nord and ALDI Süd roast coffee for their private labels, while REWE outsources the production of its private-label coffee brands.[3] For instance, ALDI Nord roasts its own-label coffee in Weyhe near Bremen, while ALDI Süd concentrates its production in Ketsch. The Schwarz Group opened its own Bon Presso roastery in Rheine to supply Lidl and Kaufland's own labels, with a planned capacity of more than 50,000 tonnes a year. Some of the roasters' biggest customers have thus become their main competitors.

## The consumers

Consumers have more coffee formats, brands and qualities to choose from than ever, while control over roasting at scale and access to the shelf remain in the hands of relatively few companies. Pods and capsules transformed home consumption in the 2000s, creating markets built around machines, proprietary formats and repeat purchases. More recently, fully automatic bean-to-cup machines have brought whole beans back to the centre of the market, and one in three German households now owns one (DKV 2026).



At the high end of the market, more than 1,500 small roasters serve growing demand for specialty and single-origin coffee, many alongside their own cafés (Bode and Burdack 2024). They are small compared with the mainstream roasters, but their growth points to a different coffee business model: smaller volumes, higher-quality coffees and closer trade relationships with producers.

## Voluntary sustainability

The coffee crisis of the early 2000s was one of the biggest price shocks in the history of the industry. After the International Coffee Agreement's (ICA) quota system collapsed in 1989, its supply management tools disappeared, and production grew more than twice as fast as demand. Millions of coffee farmers earned less than it cost them to grow coffee. **The industry faced an uncomfortable truth: a supply chain built on poverty and environmental degradation could not guarantee its own future.**

COFFEE BAROMETER 2026
See Chapter 2

The response set a pattern that still shapes the sector. **Producing countries and the International Coffee Organization (ICO) call for fundamental changes in how the coffee market works, but governments fail to agree on the necessary reforms. What fills the gap is a mix of voluntary standards, project support and multi-stakeholder collaboration.** A few German companies and agencies were among those involved. In 2001, five European coffee companies, including Tchibo and Neumann Kaffee Gruppe (NKG), founded International Coffee Partners (ICP), a pre-competitive alliance pooling funds to improve farmer livelihoods. ICP's members later launched coffee&climate (c&c) in 2010 to help farmers adapt to climate change. Both initiatives are implemented by the Hanns R. Neumann Stiftung, the foundation of NKG.

COFFEE BAROMETER 2026
See Chapter 2

From 2003, with support from GIZ and backing from major roasters including Tchibo, sector stakeholders developed the Common Code for the Coffee Community (4C), launched as a baseline standard for conventional coffee. Voluntary certification became the default answer to coffee's sustainability challenges. Fairtrade, Rainforest Alliance,

Figure 1: **The German coffee market**

## 2026 GERMAN COFFEE FACTS

### GERMAN COFFEE CONSUMPTION

**163 liter coffee a year per capita**

### COFFEE SEGMENTS

Whole beans – Ground coffee – capsules & single serve – instant

47%

43%

8%

2%

### MARKET VOLUME

Food Retail

Out of home

**€ 20 BILLION**

**€ 1 BILLION**

TAX INCOME

### EMPLOYMENT

**517,000 jobs in coffee**

### DAILY CONSUMPTION

MONDAY

**200 Million cups a day**

### LARGEST GREEN COFFEE IMPORTERS

1.5 million T — USA

1 million T — GERMANY → = 34,4% of EU imports

0.6 million — ITALY

### CONSUMER FACTS

-20% REDUCTION

-30%

**25%** buys private label coffee at discounters

CHEAP STORE

PRIVATE BRAND

**74%** looks for coffee discount

### CERTIFIED SOLD COFFEE

20%

### MAIN ORIGIN & MAIN EXPORT MARKETS

Main export

- 3.2 Rest
- 0.5 Spain
- 0.3 the Netherlands
- 1.4 Poland
- 0.3 Czech Republic

Main origins

- 4.3 million bags from Rest
- 1.3 Honduras
- 0.6 million bags from India
- 3.5 million bags from Vietnam
- 0.7 million bags from Colombia
- 5.7 million bags from Brazil
- 0.9 million bags from Uganda

See Chapter 2

UTZ and organic certification set rules for sustainable production and trade, and gave companies a way to source and sell coffee with a sustainability claim. These standards raised awareness and improved traceability, but they could not change the market structures at scale. **The mass market never absorbed the higher costs of more sustainable production. Certified supply outgrew demand, so much certified coffee is sold as conventional, which limits the potential impact of certification for producers.**

## Multi-stakeholder collaboration

German and Dutch development cooperation then helped build platforms to develop a sector-wide agenda. In 2012, IDH (the Sustainable Trade Initiative) launched its Sustainable Coffee Program, a public-private partnership supporting pre-competitive sustainability programmes in coffee-producing countries. In 2015, Conservation International launched the Sustainable Coffee Challenge, bringing together more than 120 partners to accelerate progress towards sustainable coffee. German participants include Tchibo, NKG and ALDI Süd.

A year later, the 4C Association and IDH's Sustainable Coffee Program joined forces to create the Global Coffee Platform (GCP), combining 4C's multi-stakeholder platform with IDH's country platforms. German members include Melitta, NKG, NewCoffee and Lidl. In 2019, the International Coffee Organization (ICO) established the Coffee Public-Private Task Force (CPPTF), bringing governments and coffee companies together to address challenges such as farmer income. The German government, alongside companies such as Tchibo and NKG, has supported this work.

See Chapter 3

**In principle, these platforms offer a way to tackle problems no company can solve alone. In practice, they face their own challenges, from weak accountability and limited funding to the under-representation of producers.** Participation is also voluntary and remains uneven across the sector. Dallmayr, Darboven, EDEKA, REWE and ALDI Nord, for example, do not appear on the partner lists of any of the three main multi-stakeholder initiatives.

In Germany, the Sustainable Agricultural Supply Chains Initiative (SASI), implemented by GIZ, brings retailers together to develop responsible purchasing practices and work towards living incomes and living wages in tropical commodity supply chains. REWE, Lidl and Kaufland are developing projects in Honduras and Peru. This work reflects a growing recognition that sustainability in coffee depends not only on how it is produced, but also on how companies buy it (SASI 2026).

German civil society has kept pushing companies and policymakers to act. Through research, campaigns and legal complaints, civil society brings to light much of what corporate reports leave out. Organisations such as CIR, FIAN, INKOTA and Südwind have documented poverty and labour abuses in coffee supply chains and challenged supermarkets, roasters and traders to take responsibility. For instance, since the early 2000s, FIAN has supported communities evicted by the Ugandan government in 2001 to make way for the Kaweri coffee plantation in Uganda, owned by NKG (FIAN 2021). After 24 years, displaced families have started receiving land compensation payments (Actionaid 2025).

## Mandatory due diligence

A broad coalition of NGOs, churches and unions campaigned for a German supply chain due diligence law to cover multiple commodities and industries. Germany adopted the law in 2021 and its Supply Chain Act (LkSG) entered into force in 2023, making human rights and environmental due diligence a legal requirement for large companies. It requires companies to adopt appropriate procurement strategies and purchasing practices. Furthermore, companies must establish a complaints procedure for workers and farmers to report abuses. This marked an important shift. For the first time, coffee companies in Germany were legally required to act on human rights and environmental risks in their supply chains.

In response, the German Coffee Association (DKV) launched Ear4U in 2023, a joint grievance mechanism for the coffee sector (ECF 2023). Civil society began to use the law to hold companies to account. In October 2025, Coffee Watch and other organisations filed complaints under the Supply Chain Act against Nestlé, Dallmayr and Starbucks' German operator (Coffee Watch 2025). They cited child and forced labour on supplying farms in Uganda, Brazil and China. The companies rejected the allegations (Swissinfo 2025).

**Meanwhile, EU legislation is turning compliance into a condition of market access.** Since September 2026, the Empowering Consumers Directive (EmpCo) has required sustainability claims to be specific and verifiable to avoid greenwashing. It also bans sustainability labels that are neither based on a recognised certification scheme nor set by a public authority.

See Chapter 2

The Corporate Sustainability Reporting Directive (CSRD) requires large companies to publish detailed, audited information on their social and environmental impacts, including in their supply chains. The 2026 Omnibus I reforms limited its scope to firms with more than 1,000 employees and €450 million in turnover. In Germany, this still covers the major retailers and roasters, most of which will report under the new rules from financial year 2027.

From 30 December 2026, the EU Deforestation Regulation (EUDR) will require large companies to trace coffee to the plots where it was grown and demonstrate that it is deforestation-free. From December 2027, the Forced Labour Regulation (FLR) will ban products made with forced labour from the European market. From July 2029, the EU Corporate Sustainability Due Diligence Directive (CSDDD) will bring pricing, contract terms and payment conditions within the scope of due diligence. It is the first EU instrument whose annex recognises a living income for smallholders as a human right.

COFFEE BARO-METER 2026
See Chapter 2



While the package of legislation sets an ambitious and comprehensive framework for corporate accountability, implementation is not following a straight path. In recent years, the German government has contributed to a wider retreat from sustainability regulation. It is rolling back its own Supply Chain Act and has supported efforts to delay and weaken EU legislation, including the EUDR (see Box 1). **At EU level, policymakers have also delayed or weakened rules through the 2025 "Stop-the-Clock" Directive, repeated EUDR postponements and the 2026 Omnibus I reforms.**

These changes give companies more time to prepare, but they also send a mixed message: are short-term economic interests taking priority over commitments to human rights and the environment? Against this background, the next chapter turns to the roasters and retailers that dominate the German market, to understand what they commit to, what they report, and what they leave unsaid.



BOX 1. **The German government: a lack of policy coherence**

In recent years, the German government has stepped back from some of the rules designed to make companies more accountable for their supply chains. Germany abstained from the vote on the EU Corporate Sustainability Due Diligence Directive (CSDDD) in 2024 (Trent 2024). In autumn 2025, the Federal Ministry for Economic Affairs and Energy, in agreement with the Federal Ministry of Labour and Social Affairs (BMAS), instructed the Federal Office for Economic Affairs and Export Control (BAFA) to stop reviewing company reports under the Supply Chain Act (LkSG), while the government proposed scrapping the reporting duty altogether (BMWE 2025). Germany has also backed postponing and simplifying the EU Deforestation Regulation (EUDR).

At the same time, the Federal Ministry for Economic Cooperation and Development (BMZ) funds sustainability programmes in coffee-producing countries and supports initiatives on issues such as living income, through platforms like the Sustainable Agricultural Supply Chains Initiative (SASI) and the Coffee Public-Private Task Force (CPPTF). As a result, government policy pulls the coffee sector in two directions.

Public funds pay for sustainability programmes that reach a limited number of producers. Meanwhile, the government's decisions at home weaken the pressure on companies to change how they source coffee and to share the costs of that transition. By stepping back from the implementation and enforcement of due diligence and environmental rules, the government risks protecting business as usual rather than managing the changes the sector needs.

This creates uncertainty for companies willing to invest in more responsible sourcing, while allowing those that avoid these costs to keep a competitive advantage. Voluntary initiatives alone will not level the playing field. That requires clear, consistent rules that raise expectations across the sector and give every company a reason to change, rather than leaving progress to the frontrunners.

Fiscal policy could support this shift. Germany is one of the few countries with a dedicated coffee tax, which raises more than €1 billion a year, yet it taxes all coffee alike and offers no incentive for sustainable production. Revenue on that scale brings an obligation to help keep coffee farming viable. **BMZ has proposed exempting sustainably produced coffee from the tax, but the finance ministry has so far shown little interest in changing it.**

Germany is Europe's largest coffee market, and its government has both the weight and the responsibility to drive this transformation. Securing the future of Germany's coffee industry requires the ministries responsible for regulation, development funding and taxation to pull in the same direction. Together, they could support a market in which farmers see a future in coffee, and companies carry a fairer share of the costs and risks of sustainable production.



COFFEE BARO-METER 2026
See Box 6

BOX 2 **The German Coffee Association (DKV): business as usual**

Few organisations are better placed than the DKV to raise the bar for sustainability in the German coffee market. It represents 392 member companies that import, trade and roast coffee in Germany. Its convening role has a long track record. In the early 2000s, the DKV was part of the public–private partnership that developed the 4C initiative. More recently, it has launched *Ear4U*, a grievance mechanism linked to the German Supply Chain Due Diligence Act (LkSG), and has developed the *EUDR Coffee Check*. It also publishes market data and trend analysis.

With its reach and expertise, the DKV could do more than help members understand sustainability challenges and comply with new regulations. It could set expectations that go beyond the law and give companies investing in sustainability a common voice.

Rather than taking on this wider role, the DKV has approached regulatory change with caution. Its entry in the Bundestag lobby register (DB 2026), lists the implementation of the CSDDD, the EUDR, the CSRD and the Forced Labour Regulation among its regulatory files. On each of them it seeks a "manageable and proportionate" application. In 2024, its managing director described a postponement of the EUDR as 'a matter of political fairness' (Falker 2024). Yet the companies that invest in sustainability have the most to gain from clear, enforceable rules that prevent less committed competitors from undercutting them.

Defending members' interests should mean more than pressing for rules that come later or cost less. **Building a more sustainable coffee sector means changing how companies source coffee, ensuring prices reflect the costs of sustainable production, and sharing the risks more fairly across the supply chain.** The DKV could help move this reform agenda forward. It could agree common definitions and reporting formats with its members, collect and publish anonymised aggregate market data, and share practical solutions for more responsible purchasing.

COFFEE BARO-METER 2026

See Chapter 4



**A German shopper choosing coffee faces a shelf full of options. The decision takes only seconds, often guided by a weekly promotion, brand loyalty or a certification label.**

# 3

# Assessment of the main coffee companies in the German market



Behind this apparent variety, a handful of roasters and retailers supply most of the coffee Germans drink. This chapter examines the eleven main companies: six roasters and five retailers. Following the approach of the Coffee Barometer 2026, which as–sessed the ten largest roasters and five traders worldwide, we apply the same lens to the German market.

Company sustainability reports tend to focus on supply chain efficiency, reputational risk and regulatory compliance. What companies disclose, in turn, often reflects their own priorities rather than what stakeholders need to know. This raises a basic question: is publicly available information enough to hold companies accountable, or do we need new ways to connect voluntary disclosures with mandatory reporting to understand what is really happening? To explore this, we assess company performance across three dimensions.

**Transparency** examines what companies disclose, how they report it, as well as the pressures that shape their disclosures. **Procurement** practices explores whether commercial terms match public sustainability commitments, or whether the underlying economics of trade remain hidden. **Environmental** commitments assess progress on deforestation, greenhouse gas (GHG) emissions and regenerative agriculture. It also asks whether data systems introduced to ensure regulatory compliance are driving meaningful change or simply meeting minimum requirements.

Box 3: **Company assessment methodology**

We assessed each company using publicly available information, including sustainability and annual reports, policy statements, statutory disclosures under the Supply Chain Act and corporate websites.

The assessments of JDE Peet's, Nestlé, Tchibo and Melitta were carried over from the Coffee Barometer 2026 and use company publications up to 1 February 2026, supplemented by a review of Germany-specific information. The other seven companies were assessed using information up to 31 August 2026. We shared a graphic summary of the data with each company to confirm or correct the figures. Additional data provided during this process was considered where relevant. Some companies indicated that they would publish further information after the assessment cut-off date, so this could not be included in this edition. The written assessments were not shared in advance.

The assessment follows the Coffee Barometer 2026 framework, allowing the German results to be compared with the global findings.

## Transparency

The opacity of the German coffee sector begins with a paradox. Companies publish more sustainability reporting than ever before, yet outsiders know remarkably little about the coffee that actually moves through German roasteries and onto German shelves. We assess transparency by asking four questions. Does a company report on coffee in the German market context? Does it disclose the volumes behind its percentages? Is it clear what counts as sustainable, and who verifies it? And does it report regularly, in a structured form, including setbacks and shortcomings? Certified and verified shares are one piece of evidence among several in this assessment. They show that coffee meets the requirements of a voluntary scheme, not that farmers earn a living income or that production is free from deforestation or human rights abuses.

See Chapter 2 and 5

Across the eleven companies, five patterns stand out, and Figure 2 shows how much basic information is still missing. Reporting is often irregular and out of date. Companies follow different reporting cycles: some publish only brief or occasional updates, while others rely on policies and data that are years old. Openness about setbacks is rare: target dates move and promises go unaccounted for. Germany largely disappears within group-level reporting, while coffee gets lost among the many products covered in retailers' reports. Volumes are the weakest element almost everywhere, while retailers tend to count products rather than tonnes. Meanwhile, the way companies define and verify sustainable coffee is shifting. Retailers still rely on independent third-party certification such as Fairtrade, Rainforest Alliance or organic. Roasters increasingly use second-party verification: the company, or its trader, defines what counts as responsible sourcing and commissions the checks itself, or through specific service providers such as Enveritas.

See Chapter 2

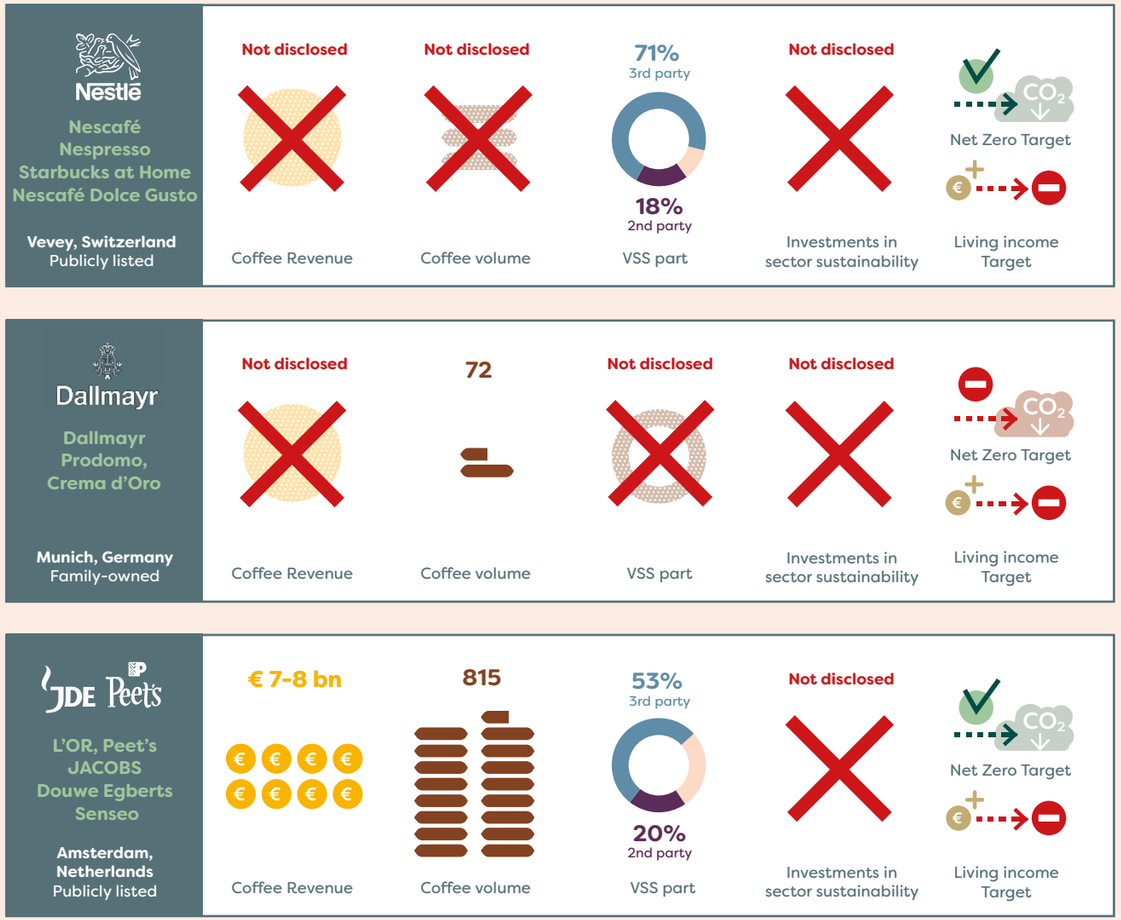


Figure 2: **The transparency gap in roaster and retailer reporting**




Coffee volume x1000MT

Figure 2: **The transparency gap in roaster and retailer reporting**











Coffee volume x1000MT

This last pattern sits uneasily with the EU's Empowering Consumers Directive (EmpCo). Since September 2026, sustainability claims made to consumers must be specific, verifiable, and supported by recognised certification schemes. We expected companies to review and tighten their claims ahead of the deadline, but found no company explaining how it planned to meet these requirements.

Nestlé and JDE Peet's publish structured, quantified reporting with clear targets, but all their figures are aggregated at global level. Nestlé's only Germany-specific claim concerns a single factory: it reports that all coffee processed at its Dolce Gusto plant in Schwerin is responsibly sourced and traceable to farmer groups. Nestlé distinguishes between third-party certification and second-party verification in its figures. JDE Peet's reports that Germany accounted for about 9% of group revenue in 2024. It defines responsible sourcing through its Common Grounds framework and increasingly relies on Enveritas. The company has pushed back its target of 100% responsibly sourced coffee from 2025 to 2028.

Tchibo and Melitta also report certified and verified shares, but neither discloses the underlying volumes for its German or global operations. Tchibo aims to source all of its green coffee by 2027 "from sources that are either certified or verified as responsibly purchased according to the Enveritas standards." Melitta's reporting is irregular; the last comprehensive sustainability report dates from 2022, followed by brief updates in 2023 and 2024, the most recent published only in German. Rather than relying on external standards, it promotes *Coffee of the Future*, a concept with no publicly available criteria, minimum requirements or indicators.

Darboven aims for 100% "responsibly sourced" more sustainable coffee by 2030, without defining what that means. It reports coffee-specific data, and its group figures offer a reasonably clear picture of its German operations. Its *Sustainability Report 2024/2025* is well structured and states that the company purchased 50,272 tonnes of green coffee in 2025, of which 15.4% (7,751 tonnes) carried Fairtrade, Rainforest Alliance or organic certification.

Dallmayr places strong emphasis on quality, origin and trust, yet provides limited public information on how it sources coffee. It publishes no sustainability report. Relevant information is scattered across webpages, press releases and statutory disclosures under the Supply Chain Act. The lack of transparency is striking given the company's scale: in 2024, it generated group revenue of €1.29 billion and roasted 72,000 tonnes of coffee at five German sites.

Among the retailers, coffee barely features in sustainability reporting. As one product among thousands, it receives little attention beyond certification rates of private-label ranges. Almost none of the retailers discloses the volumes behind those figures.



Lidl publishes up-to-date reporting, with policies that identify the main risks in coffee. It requires all its private-label coffee to be certified under Fairtrade, Rainforest Alliance or organic standards. It reports 100% certification for permanently listed private-label coffee in Germany, covering whole beans, ground coffee, capsules, pads and instant coffee. However, the figure is based on product lines, not sales or volumes.

REWE Group publishes extensive sustainability information, but gives coffee little attention beyond identifying it as a high-impact raw material. Its Coffee Guidelines date from 2021, and progress is reported only in terms of certification. All REWE and PENNY private-label coffee has been certified since 2020, but it does not disclose what share of its total coffee sales these products represent.

ALDI Süd reports through the ALDI South Group, which aggregates most coffee information across eleven markets. As a result, it is hard to tell how ALDI Süd applies its approach at its own NewCoffee roastery at the other roasters that supply it, or to branded coffee. In Germany, ALDI Süd reports that all of its private-label coffee products are certified, compared with around 85% across the group. Both figures count products, not the volumes the company buys. Alongside certification, it now accepts trader programmes such as ofi AtSource, Sucafina Impact and LDC RSP Advanced.

With revenue of €77.3 billion and around 10,800 stores, EDEKA is a major player in German retail. Yet its main corporate report barely mentions coffee. It discloses no coffee volumes, origins or suppliers, although it reports that 100% of its national private-label coffee products are certified under Rainforest Alliance, Fairtrade or organic standards. It remains unclear whether regional brands or foodservice coffee are covered.

ALDI Nord's reporting is dated. The latest coffee data is from 2023, when 73.7% of its private-label coffee was certified, about 94% of it under Rainforest Alliance. It was the only retailer to disclose a volume-based figure for Germany, but has since published no update on its sustainable coffee sourcing progress. It still refers to a Coffee Purchasing Policy from 2016 that is no longer publicly available.

## Procurement policies

A coffee sector that leaves farmers unable to earn a living income while depleting the ecosystems it depends on cannot credibly claim to be on a path to sustainability. **Coffee smallholders bear much of the cost and risk of production, while value accumulates further down the chain. This is not a sustainable system; it is one that is structurally dependent on low producer remuneration.** This requires more than certification standards and voluntary sustainability initiatives: it means changing the purchasing practices that shape commercial decisions. Fair farmgate prices, living wages, long-term trading relationships, genuine risk-sharing and long term investment in more sustainable practices must become part of doing business in the coffee sector.

Commercial purchasing terms determine how value is distributed along the chain. Yet none of the eleven companies assessed discloses its pricing structures, contract durations, risk-sharing arrangements or premiums paid above the commodity price. Without this level of transparency, it is impossible to tell whether sustainability programmes deliver tangible financial benefits for farmers or function mainly to help buyers secure supplies and meet compliance requirements.

Companies often cite competition law as a barrier to disclosure of such information. While competition law prohibits competitors from coordinating prices, it does not prevent individual companies from reporting on their purchasing policies and practices. **Companies could disclose the share of suppliers covered by long-term contracts, the proportion of the supply chain assessed through sustainable production cost analyses, and the percentage of contracts that pay above that cost, without revealing commercially sensitive terms.** Living-income commitments and outcome reporting tied to sourcing volumes are another way to assess whether companies translate their sustainability ambitions into purchasing practices.

Among the roasters, Tchibo, JDE Peet's, Melitta, Darboven and Dallmayr lack formal living-income commitments. All refer to farmer livelihoods, and several highlight long-term supplier relationships, but none explains what these mean in practice: how much farmers are paid, how long contracts last or whether buyers guarantee volumes. Nestlé comes closest. It identifies living income as a salient human rights issue, has a dedicated action plan and uses income benchmarks. However, it presents living income as an objective in its programmes, rather than a commitment embedded in its purchasing. Its pilots in Indonesia, Côte d'Ivoire and Mexico remain limited in scale, with no public household income data (CB 2026).

Retailers sell much of Germany's coffee and set the terms for their private-label products. Around half of coffee packs are sold on promotion, yet no retailer discloses how these discounts affect the prices paid to suppliers (BASIC 2024). Since early 2025, Lidl and Rewe have been working together in the German Retailers Working Group to improve incomes in coffee projects in Honduras and Peru (SASI 2026). EDEKA does not take part. The initiative provides a platform for collective action – such as income analyses and on-farm measures in Honduras and Peru, responsible sourcing practices, and LIRP payment trials with Fairtrade, but public reporting offers limited insight into how participating retailers are translating this work into their daily purchasing practices.

The retailers' reporting offers a few examples: Lidl's Way To Go coffee, sourced from the COMSA cooperative in Honduras under Fairtrade, carries an additional premium intended to help farmers reach a Living Income Reference Price. Yet Lidl discloses neither the benchmark nor the volumes purchased. ALDI Süd, which made a general living-income commitment in 2020, worked with trader ofi on a project involving around 1,000 households in Honduras. Between 2021 and 2025, the share of assessed farmers earning above the living-income benchmark rose from 35% to 54%. But coffee prices also reached record highs during this period, so the improvement cannot be attributed to the project alone. ALDI Süd's reporting does not clarify how it plans to extend this approach across its wider coffee supply. At EDEKA and ALDI Nord, living income features in overarching policy statements and position papers, but has yet to translate into a coffee-specific strategy.

## Environmental commitments

**Coffee sits at the intersection of deforestation, climate risk, biodiversity loss and farmer livelihoods. Linking these issues in one coherent strategy for a resilient coffee sector is operationally possible. Yet the industry has not built the shared infrastructure that this logic demands.**





On paper, most roasters have the targets and plans needed to decarbonise their coffee supply chains. Nestlé, JDE Peet's, Tchibo, Melitta and Darboven all have targets validated by the Science Based Targets initiative (SBTi). Nestlé's roadmap breaks down expected emissions reductions by lever, from deforestation prevention to agroforestry and restoration. It reports that its primary coffee supply chains were assessed as deforestation-free in 2025. In January 2026, JDE Peet's published the sector's first Nature Transition Plan aligned with the Taskforce on Nature-related Financial Disclosures, and it reports near-complete deforestation-free sourcing.

Darboven provides the most detailed account of climate reporting among the German companies reviewed. Its new inventory shows Scope 3 emissions rising by 27.5% in 2025, driven mainly by purchased goods and transport, alongside a roadmap that includes coffee-specific farm measures.[4] Tchibo's SBTi-validated targets include net zero by 2045. Melitta's targets are SBTi-validated, but it has not published a coffee-specific pathway. Dallmayr has committed to setting science-based targets through SBTi, but has yet to set validated targets and develop a coffee-specific decarbonisation strategy. It publishes no deforestation policy.

Projects in coffee-producing countries often take the place of clear, coffee-specific sustainability policies and plans. Nestlé reports that 32% of its coffee came from farmers implementing regenerative practices in 2024, against a target of sourcing 50% of key ingredients from regenerative agriculture by 2030. The GCP's RegenCoffee guidance takes an outcome-focused approach, linking farm practices to expected outcomes for soil, water and biodiversity and to indicators that measure them (GCP 2025). Like most companies, Nestlé reports how many farmers take part, not verified results such as lower emissions, healthier soils, better water management or richer biodiversity. Darboven reports that 452,536 shade trees were planted across Honduras, Peru and India by the end of 2025, linked to selected Café Intención products. Dallmayr reports more than 55 million seedlings were distributed in Ethiopia. Neither discloses tree survival rates, verified environmental outcomes or how much of the coffee is linked to their procurement.

On paper, the retailers' climate frameworks read at least as ambitious. What these frameworks mean for the coffee sector remains largely unclear. No retailer discloses coffee-specific emissions, its contribution to the Forest, Land and Agriculture (FLAG) target or a coffee-specific reduction pathway. EDEKA aims to cut Scope 3 FLAG emissions by 36.4% by 2032 and to reach net zero by 2045. REWE targets a 30.3% reduction in FLAG emissions by 2030. Schwarz Group, which owns Lidl, has SBTi-validated net-zero targets for 2050. ALDI South Group has SBTi-validated, near-term FLAG and net-zero targets and a commitment to end deforestation linked to primary commodities by the end of 2025. ALDI Nord is the only retailer without an SBTi-validated net-zero target. Its validated near-term targets cover Scope 1 and 2 emissions reductions and Scope 3 supplier engagement, rather than direct reductions in Scope 3 emissions.



**There is a persistent gap between the information companies publish and its value in showing where the sector is heading.**

# 4



# Reflection

The company assessment of Germany's coffee market reveals a familiar problem: the gap between stated ambition and verifiable action remains wide. This chapter examines what this pattern means for the German market. Germany has the market power and resources to drive real change, yet the sector remains stuck in business as usual rather than tackling the fundamental changes needed to make coffee more sustainable. Germany is no exception: the three factors identified in the Coffee Barometer 2026 – self-verification, legal caution and reporting complexity – apply here too. Together, they make independent scrutiny harder and widen the gap between companies' sustainability claims and what outsiders can verify.

See Chapter 5

## More reports, less clarity

The growing number of reporting frameworks rewards complexity over comparability. Companies publish policy statements, progress reports, partnership updates and statutory disclosures that suggest comprehensive reporting, yet make the basic figures hard to find and harder to compare. Companies count in their own units, by tonne, by product or by brand, or report for their global group rather than for Germany. Data is often incomplete or outdated, making it difficult to assess and verify actual impacts across the coffee value chain. The result is a persistent gap between the information companies publish and its practical value for anyone trying to assess what happens in the coffee sector.

The style of reporting reinforces this gap. German companies tend to show that procedures exist, through policy commitments, supplier codes of conduct, internal verification standards and third-party certification. They reveal far less about where serious sustainability gaps occur and how they plan to address them.

So far, regulation has made companies more cautious rather than more open. Under the German Supply Chain Act, the EUDR and the CSDDD, detailed sourcing data can become evidence if a supplier later proves non-compliant. Yet regulation also pushes in the other direction: the CSRD will require large companies, including the major retailers, to publish key sustainability metrics, and under the Forced Labour Regulation, openness and cooperation with enforcement authorities are among the main ways companies can reduce their risk.

At the same time, the independent certification data that once offered an external check on company claims is shrinking. Fairtrade, Rainforest Alliance and 4C track and publish the volumes certified under their standards. Yet companies increasingly replace independent third-party certification with proprietary second-party verification. Of the 33 schemes recognised under the GCP Equivalence Mechanism, only Fairtrade, Rainforest Alliance, organic and 4C offer third-party assurance. Companies or traders run the other 29 themselves, with different scopes, audit depths and levels of public access (GCP 2022–2026). **GCP recognition confirms that these schemes meet shared baseline principles, not that they offer the same assurance as independent certification, a distinction companies rarely clarify.**

COFFEE BARO-METER 2026

See Chapter 5

As a result, independent volume records are disappearing. Second-party systems leave companies as the sole gatekeepers of what they report, how they aggregate it and against which standard. When companies verify their own claims, they also decide what to publish. Until recently, a claim of "100% responsibly sourced" could be made without disclosing what volume it covered, what the underlying proprietary standard required, or how either had changed over time. Since September 2026, EmpCo has changed that, at least for claims made to consumers. Environmental claims must now be specific, verifiable and backed by evidence, and sustainability labels must rest on a recognised certification scheme with independent monitoring, or be set by a public authority. As such, second-party verification systems do not meet the requirements of the EmpCo Directive. With many existing corporate claims no longer permitted, the question is how the sector will adapt, including the 29 second-party programmes covered by the GCP Equivalence Mechanism.

## Due diligence

Large companies active in the German market already have due diligence systems in place under the Supply Chain Act (LkSG). These include supplier monitoring, risk management and grievance mechanisms. However, these systems focus mainly on identifying risks and assessing supplier compliance, not on how buyers' own commercial decisions affect producers. Mandatory due diligence under the CSDDD will shift the focus. From July 2029, the revised CSDDD will require companies in scope to address adverse human rights and environmental impacts across their value chains (BHRS 2026). For coffee companies, this brings greater attention to how purchasing practices affect producers, including if prices, payment terms and contract arrangements contribute to human rights risks. It is not enough to know whether suppliers meet social and environmental standards; companies have to consider if their purchasing practices allow coffee farmers to earn a decent living. Voluntary multi-stakeholder collaboration can help companies make this shift in the coming years, moving from endorsing broad principles to making practical changes to their procurement practices.



## Responsible procurement

In March 2026, GCP, IDH and Solidaridad presented the *Common Procurement Principles*, endorsed by fourteen companies. The principles call for longer-term, trust-based collaboration and for buyers to support conditions in which farmers can recover their costs. Yet they define neither "longer-term" nor "cost recovery", and they set no living income benchmarks, targets or enforcement mechanisms. Price, the core element of any procurement relationship, is left out altogether. Nor do the principles commit to using value- and risk-sharing mechanisms to increase the share of value that reaches producers (VOCAL 2026).

Meanwhile, in October 2026, GCP, GIZ, IDH and Solidaridad announced the joint development of a Coffee Sector Guidance for Responsible Procurement. Facilitated by the Sustainable Food Lab and backed by 18 roasters, retailers and traders, it aims to provide a common, industry-wide framework with actionable recommendations for aligning purchasing practices with corporate sustainability goals (SASI 2026). Planned activities for 2026 and 2027 include internal company assessments, anonymised supplier feedback on purchasing practices and work on how to make responsible procurement part of standard business practice. Within the limits of competition law, the joint guidance aims to combine high-level principles with practical examples of responsible procurement. Roasters, traders and retailers can use it to review their purchasing practices and to check whether their pricing, contract terms and risk-sharing allow producers to cover the costs of sustainable production. Several of the most influential German players have still to join. These include roasters Tchibo, Melitta, Darboven and Dallmayr, and the retailers ALDI Nord, ALDI Süd and EDEKA. Small- and medium-sized companies, often with close supplier relationships, could meanwhile bring fresh approaches and show what value chain transparency looks like in practice, see the 2024 Specialty Coffee Transaction Guide (SCTG 2025).

## From policies to practice

The EUDR will be the first real test of whether companies' policies hold up in practice. From 30 December 2026, large operators must prove the origin of their coffee. The regulation requires plot-level GPS coordinates, farm-level traceability and structured due diligence documentation across a widely dispersed smallholder supply base. German companies are investing in the systems to meet it. For example, Darboven

uses osapiens to screen strategic suppliers and plans satellite-supported deforestation checks. Meanwhile, JDE Peet's, Tchibo and NKG launched the pre-competitive Coffee Canopy Partnership in April 2026 to map coffee landscapes.

The harder question is whether compliance also helps farmers tackle the causes of deforestation. The risk lies less in the regulation itself than in how buyers respond: by moving sourcing to lower-risk origins instead of investing in compliance support where the barriers for smallholders to comply are highest. None of the roasters or retailers explains in clear terms how it supports smallholders in meeting EUDR requirements.



Regenerative agriculture faces a similar test. It has become the industry's preferred narrative to link Scope 3 targets to the farm. The sector now even has a common language for it. The GCP's RegenCoffee Guidance (GCP 2025) provides an outcome-based definition centred on soil health, biodiversity and water stewardship. In practice, companies still report operational reach, such as the share of coffee from enrolled farms, rather than verified results, like measured emissions reductions.

Regulators, investors, consumers and civil society organisations all ask for evidence rather than promises. A recent example from civil society is *Wald in der Kaffeetasse* (*Drinking Deforestation*), a report published in March 2026 by Deutsche Umwelthilfe and Coffee Watch. This study of 21 coffee companies operating in Germany found major gaps in environmental and human rights due diligence. Companies rarely explain how they address deforestation, hazardous pesticide use or labour rights violations at farm level. The report concludes that legislation is sustaining and accelerating improvements, even though companies' compliance, and their preparation for it, remains very uneven (Bollmohr 2026).

## Beyond compliance

Germany's coffee sector does not lack sustainability initiatives, commitments, collaborations or reports. Years of experience with voluntary standards and sector-wide initiatives have created systems, partnerships and a foundation to build on. Yet there is little evidence that these efforts have shifted the sector as a whole towards more sustainable production and trade. They remain fragmented across companies, origins and projects and are seldom backed by transparent purchasing data or proof of lasting improvements in coffee farmers' livelihoods.

Sustainability data is moving in-house, purchasing terms remain out of sight, and climate targets rarely reach the coffee farm. At the same time, the conditions for change are all in place. Regulation is turning voluntary promises into obligations. Joint guidance offers practical steps towards responsible procurement, and traceability systems being built for the EUDR could provide the basis for sharing data across the sector. These are useful, but none of this guarantees change in coffee-producing countries.



**Moving from procedural compliance to shared value.**

# 5



# Conclusion

Two decades of voluntary pledges, sustainability schemes, and fragmented projects have produced a wealth of reporting, but they have not changed the commercial terms that determine what farmers earn. The German coffee industry remains profitable, while farming families absorb rising production costs, climate shocks and market volatility. A supply chain that depends on low producer prices and unpaid family labour cannot secure its own future.

Germany has the commercial weight to change this. It handles about a third of EU coffee imports and hosts Europe's largest roasting industry, while five retail groups account for about three-quarters of its food retail. Yet the sector remains stuck in procedural compliance. Meeting European due diligence and deforestation laws is a legal minimum, not a sustainability strategy. Real progress means moving beyond isolated farm-level interventions to market reform that shares value and risk fairly along the chain.

That shift requires coherent action from every commercial and public actor. Coffee roasters and retailers carry the most direct responsibility. Their roles are blurring as retailers increasingly run their own roasteries to produce own-label coffee. Both must bring their purchasing into line with their public sustainability commitments, and that starts with disclosure of basic facts and figures. Instead of selective percentage claims, they should report how many tonnes of green coffee they buy, by origin and standard, together with aggregated data on their purchasing practices. They should set time-

bound living income targets and be transparent about the gap between farmgate prices and living income benchmarks. On climate, they should disclose coffee-specific Forest, Land and Agriculture (FLAG) emissions baselines, with reduction pathways verified by results on the farm.

Disclosure alone will not change what farmers earn. This requires moving away from transactional short-term buying towards multi-year agreements that offer transparent terms and fair risk-sharing. These contracts should reflect the verified cost of sustainable production and living income reference prices. Responsible procurement then becomes part of core commercial operations rather than a sustainability add-on. Retailers hold a particular lever here: they should end the aggressive promotions that devalue coffee and absorb discounts within their own margins. When listing coffee, they should favour suppliers that pay living income reference prices over the cheapest bid.



Regulation is also raising the bar for what companies can claim. Since September 2026, the Empowering Consumers Directive (EmpCo) has required sustainability claims made to consumers to be specific and verifiable. This may revive interest in independent third-party certification as a transparent, volume-based baseline. Whichever system companies choose, buyers must carry the costs of compliance themselves rather than pass them on to producers, and that includes compensating farmers for the data they provide. Shared, open-source compliance tools could lower these costs for everyone. Joint investment in landscape initiatives that scale agroforestry, regenerative agriculture and climate adaptation would strengthen the origins on which all buyers depend.

At the institutional level, the German Coffee Association (DKV) can move from defensive lobbying to proactive leadership in supporting a level playing field. It could set a standardised national reporting format covering conventional and certified volumes, and issue guidance on responsible procurement that complies with competition law. Together, these steps would create a transparent baseline that rewards frontrunners.

At the same time, government policy must become coherent. Consistent enforcement of due diligence rules, without further rollbacks, would stop laggards from undercutting frontrunners. The government should anchor proven sector initiatives in national policy, promote a fairer distribution of value and co-finance smallholder climate adaptation and shared, open-source compliant infrastructure. The coffee tax, which raises more than €1 billion a year, should be reformed to reward sustainably produced coffee.

Ultimately, securing Germany's coffee supply depends on making coffee farming economically viable and ecologically resilient, and on sharing value along the chain.

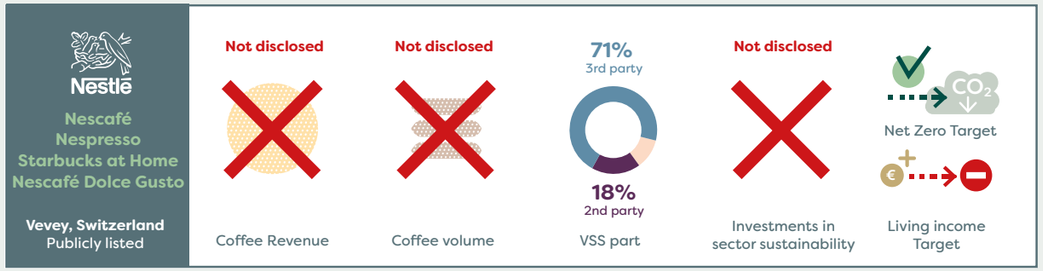
# Annex



6

# Company Assessments

# Nestlé




Nestlé, the world's largest food group, has a significant coffee business in Germany through Nescafé, Nespresso and Starbucks at home. Its Schwerin facility produces Nescafé Dolce Gusto for German and European markets. Sustainability is guided by group-wide climate and forest strategies and specific brand programmes.

## Transparency

Rather than operating a standalone coffee sustainability strategy, Nestlé embeds coffee within group-wide climate, forest and human rights frameworks, which set direction across commodities and businesses. Coffee-specific programmes and reporting are channelled primarily through NESCAFÉ – representing the majority of group coffee volumes – and Nespresso for a smaller, high-value segment, a structure that strongly shapes both delivery and disclosure. Nestlé's sustainability disclosure is notable for its clarity, accessibility and depth, with articulated positions across climate, deforestation, sourcing and human rights. At the same time, while direction and ambition are clear, disclosure is less consistent in translating and monitoring commitments into verifiable livelihood improvements for farmers.

- Documentation is accessible and detailed, with quantified targets (climate, deforestation, human rights) and regular progress updates.
- Coffee-relevant data is reported, but often aggregated at group or brand level, making it difficult to trace progress consistently across the full coffee supply chain.
- Clear pathways are described, yet outcomes and coverage are not always consistently verifiable over time at coffee level.

## Procurement

Nestlé's coffee procurement targets 100% responsibly sourced coffee, implemented through a combination of third-party certification, second-party verification, and Nestlé's own Responsible Sourcing Standard and Agriculture Framework. According to GCP reporting, 89% of purchases were sourced through recognised sustainability schemes in 2024 (71% third-party; 18% second-party). Nestlé reports a higher figure of 92.9% responsibly sourced coffee, including an additional 4.2% from sources not yet reflected in GCP-recognised scheme reporting.

Within this, 93% of NESCAFÉ's coffee was reported as responsibly sourced in 2024, with NESCAFÉ historically relying on 4C as a baseline, while Nespresso operates the more intensive AAA Sustainable Quality™ Program. More recently, Nestlé has expanded its procurement approach beyond responsible sourcing to encourage farm-level transition towards regenerative and climate-resilient production, particularly through the NESCAFÉ Plan 2030. In 2024, Nestlé sourced 32% of its coffee from farmers implementing regenerative practices. The company has set a target to source 50% of key ingredients from regenerative agriculture by 2030, positioning this as a core lever towards net-zero and broader nature-related outcomes.

Income-related objectives are acknowledged as salient human rights issues with dedicated action plans and income benchmarking. However, living income is framed as an enabling objective rather than a guaranteed outcome commitment. For instance, by 2030, all smallholder farmers in its AAA Program should receive the Living Income Reference Price (LIRP). This applies to coffee sold to Nespresso in Indonesia, Guatemala, Colombia, Peru and Mexico, where Fairtrade International has established the LIRP and most AAA farmers are smallholders. Questions remain around the timeline, coverage, scale and verification of livelihood improvements across Nestlé's main coffee supply chains.

## Policies

Nestlé's sustainability policies are well developed and cover all core environmental and social dimensions relevant to coffee. Most notably, Nestlé's company-wide climate policy moves beyond headline commitments by articulating a quantified net-zero transition pathway. Its SBTi-validated, 1.5°C-aligned roadmap disaggregates expected emissions reductions across the value chain, explicitly identifying the contribution of interventions such as deforestation prevention, agroforestry, improved farm practices and restoration activities. The company targets a 50% emissions reduction by 2030 and net-zero by 2050.

Human rights governance shows a similar level of maturity. Nestlé publicly identifies salient human rights risks and anchors these in dedicated action plans, clarifying how issues such as living income, land rights and child labour are prioritised across supply chains. Yet while the governance architecture is well developed, outcome targets and timelines are often less clearly articulated, particularly for complex issues such as living income.

The clearest area for improvement is nature and biodiversity. While these are clearly recognised and embedded within forest and sourcing policies, they are not yet translated into (science-based) nature targets, leaving a gap between quantified climate pathways and measurable biodiversity accountability.

## German perspective

Nestlé Germany communications reflect the global approach, centred on group frameworks, the NESCAFÉ Plan and Nespresso's AAA programme. At its NESCAFÉ Dolce Gusto plant in Schwerin, Nestlé reports that all coffee processed is responsibly sourced through the NESCAFÉ Plan and traceable to farmer groups. Beyond this example, it discloses no Germany-specific coffee revenue, market volumes or sourcing shares. The German perspective therefore largely reinforces the global assessment.

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# Dallmayr




Founded in Munich in 1700, Dallmayr is a family-owned German group active in roasted coffee, vending, delicatessen and gastronomy. It reported group revenue of €1.29 billion in 2024 and produces more than 72,000 MT of roasted coffee annually at five German sites. Coffee is sourced from over 20 origins and sold through retail, out-of-home and vending channels. Despite its size, Dallmayr discloses relatively little about its sustainability performance. This limited disclosure contrasts with Dallmayr's premium positioning, which emphasises coffee quality, origin and trust.

## Transparency

Dallmayr does not publish a sustainability report. Its disclosure is spread across corporate sustainability webpages, a human-rights policy statement and promotional press material. These sources describe activities but say little about ambition, implementation coverage or progress. Dallmayr's sustainability approach combines regulatory due diligence, selected certified product lines and sustainability projects, but lacks a clearly defined company-wide strategy with measurable targets.

- Terms such as "steadily increasing," "gradually implementing" and being "on the right track" are not supported by baselines, target years or performance indicators.
- Voluntary, time-bound commitments on sourcing, climate and farmer income are largely absent.
- Its "Via Verde" refers primarily to a range of organic and Fairtrade-certified products for Business-to-Business (B2B), foodservice and vending, rather than a group-wide sustainability management system.

## Procurement

Dallmayr offers selected products certified under EU Organic, Fairtrade and Rainforest Alliance standards, but discloses neither a certification commitment nor the current certified share. Its four-step procurement approach, framed around LkSG compliance,  covers supply-chain transparency, risk analysis, supplier requirements and issue-triggered response. Its human rights statement adds supplier self-assessments, contractual requirements and origin audits. Dallmayr presents its Supplier Code of Conduct as central to LkSG implementation, but it is not publicly available. Its implementation is described as gradual, and reports no supplier or volume coverage, audit findings, remediation results or evidence of effectiveness.

Origin engagement focuses on Ethiopia and includes tree planting, water infrastructure, farmer training and support for a cooperative. These activities demonstrate sustained project engagement but are not linked to overall sourcing volumes or procurement requirements. Claims of long-term supplier relationships are not supported by information on contract duration, pricing, purchasing commitments or risk sharing.

## Living income

Dallmayr associates higher-quality coffee and improved productivity with increased farmer income. Its Ethiopia programme aims to raise the incomes of participating families. However, it discloses no living-income benchmark, income-gap assessment, quantified target or measured outcome.

## Environment and climate

Dallmayr calculated a corporate carbon footprint covering Scopes 1 to 3 using 2019 data and reported reductions by 2021. However, the reported footprint excluded raw materials, packaging and related inbound logistics, the main emissions sources, while Dallmayr's own product assessment attributes 89% of coffee emissions to green coffee. Dallmayr discloses no recent complete inventory, SBTi-validated target or coffee-specific decarbonisation pathway. In Ethiopia, it reports the distribution of more than 55 million seedlings for regional reforestation (alongside 2.2 million coffee seedlings) and farmer-training on climate resilient agriculture activities through its long-standing partnership with the foundation Menschen für Menschen. However, it does not report tree survival rates, verified environmental outcomes or coverage relative to its coffee supply. Dallmayr publishes no public company-wide deforestation policy or explanation of its EUDR implementation system.

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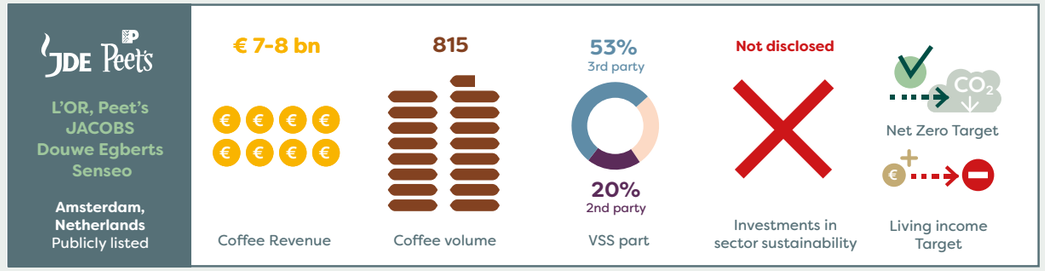
# JDE Peet's






JDE Peet's, now part of Keurig Dr Pepper (KDP), is one of the world's largest coffee groups. Its German business centres on Jacobs, founded in Bremen in 1895, which became Germany's best-known coffee brand. The group operates major roasting facilities in Bremen and supplies retail and out-of-home markets through a wide portfolio of brands.

## Transparency

Over the past decade, JDE Peet's sustainability approach has matured from fragmented, legacy-brand initiatives into a consolidated, group-wide framework, with clearer targets and stronger climate governance. Sustainability disclosures are accessible, consistently presented, with increasing use of quantitative reporting on climate and sourcing issues.

- Policies, commitments, and governance systems are clearly disclosed and coffee-relevant.
- Disclosure is well structured and accessible, though implementation and intervention pathways are less consistently visible.
- Progress is reported through quantitative indicators, but tracking remains largely aggregated, limiting origin-level and outcome-level traceability over time.

## Procurement

JDE Peet's aims to reach 100% responsibly sourced coffee by 2028 (revised from 2025), operationalised through its Common Grounds framework established in 2015. The company frames responsible sourcing around climate and nature-related objectives, including regenerative agricultural practices and deforestation-free supply chains, an approach further articulated in its Nature Transition Plan. It refers to farmer livelihoods within the framework, but living income commitments and targets remain absent. In recent years, procurement has shifted towards second-party verification systems, including greater reliance on Enveritas-based assessments, with third-party certification playing a smaller role. This appears to be a pragmatic response to scale, favouring systems that are more operable and resource-efficient across large volumes. While this provides a structured basis for risk identification and prioritisation, it remains less visible how identified risks translate into procurement decisions, supplier requirements, remediation priorities, and ultimately differentiated action on the ground.

## Policies

JDE Peet's has put in place a broad and coherent policy framework. These policies are framed as informing strategic priorities, rather than serving compliance purposes only. This is reflected in the company's engagement with SBTN and TNFD, which signals a broader framing of environmental risk that links climate, nature, sourcing, and supplier-related impacts, instead of addressing them as isolated topics. Against this backdrop, the company's SBTi-validated net-zero target across Scopes 1– 3 is accompanied by a high-level articulation of delivery pathways, linking operational decarbonisation with upstream changes in agricultural practices. While still high-level, these pathways provide greater visibility on where emissions reductions are expected to come from. The adoption of a corporate NDPE policy with a 2025 zero-deforestation target year, alongside reporting of near-complete deforestation-free sourcing, reflects early alignment with EUDR requirements. While policy commitments and headline outcomes are clearly disclosed, there is less visibility on how implementation challenges, residual risks, and corrective actions are managed in practice. While severe human rights risks are identified and due-diligence systems are described, including a target to assess 100% of direct coffee suppliers through Phase 1 HRDD by 2025, more insight into identified risks, remediation approaches, and evidence of improvement would strengthen confidence in how policies translate into outcomes on the ground.

## Looking ahead

Following JDE Peet's integration with Keurig Dr Pepper in April 2026 ("Global Coffee Co."), the coming years will show how governance, organisational culture, and implementation priorities shape the evolution of the company's sustainability approach.

## German perspective

The German perspective largely reinforces the global assessment rather than extending it. German communications refer to the global Common Grounds framework and associated climate and sourcing commitments, without introducing distinct Germany-specific targets or implementation approaches. Germany accounted for approximately 9% of JDE Peet's total group revenue in 2024, underlining the importance of the German market. However, no Germany-specific data on coffee revenue, volumes, sourcing, certification, or sustainability performance were identified that materially add to the global disclosures.

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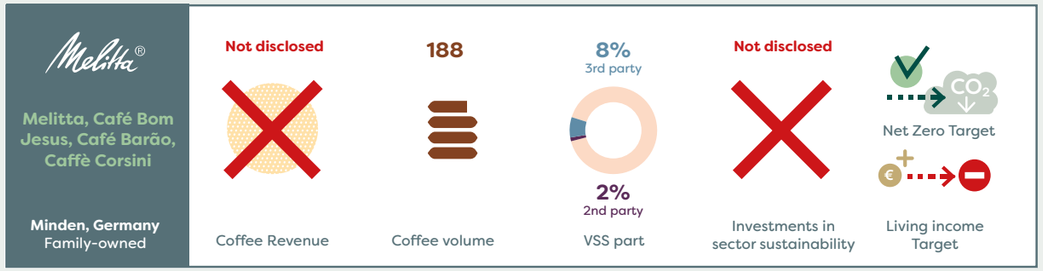
# Melitta




Melitta is a family-owned German coffee company and one of the world's larger coffee roasters, with activities spanning coffee sourcing, roasting, and consumer coffee products. It roasts 188,000 MT of coffee annually and sells in more than 60 countries. Its coffee sustainability approach centres on its "Coffee of the Future" framework and SBTi-validated net-zero climate targets.

## Transparency

Melitta presents itself as a procedurally mature company, with most formal sustainability structures in place. Its sustainability approach is characterised by strong governance and regulatory alignment, but it offers limited transparency on how commitments translate into priorities, implementation, and outcomes, particularly at origin level.

- Policies and commitments are clearly stated, including climate targets.
- Quantitative data are fragmented, with limited outcome reporting and uneven coffee-specific disclosure, which makes progress hard to track over time.
- Its reporting is irregular: the most comprehensive report dates from 2022, followed by brief updates in 2023 and 2024, the latter in German only.

## Procurement

Melitta's coffee sustainability narrative centres on its internally defined "Coffee of the Future" concept, which combines environmental protection, climate action, and long-term farmer livelihoods. Broad in scope, the concept is not operationalised through publicly defined criteria, minimum requirements, or KPIs, making it difficult to assess ambition or progress. At the same time, procurement data points to a notable shift: Melitta's reported share of certified and verified sustainable coffee has declined significantly, from nearly 25% in 2020 to around 9% in 2024. This marks a shift from externally benchmarked standards towards internally defined sustainability approaches, reducing transparency, comparability, and external accountability.

While Melitta refers to projects in origin countries and long-term supplier relationships, it does not explain how its core purchasing practices contribute to addressing structural income challenges for smallholder farmers, beyond isolated, project-based initiatives.

## Policies

Melitta's sustainability governance emphasises policies, systems, and compliance processes. It has a Supplier Codes of Conduct, human rights due diligence processes, grievance mechanisms, and environmental management systems in place and updates them regularly. At group level, climate governance stands out. In 2025, SBTi-validated Melitta's Scope 1–3 targets, including FLAG emissions: a 42% reduction in Scope 1 and 2 emissions by 2030, a 45.5% reduction in FLAG Scope 3 emissions by 2035, and net-zero emissions by 2045, requiring a 90% reduction. Yet Melitta does not translate these commitments into a coffee-specific implementation strategy, leaving it unclear how sourcing and supply-chain practices will deliver them. Beyond compliance, its policies rarely articulate a forward-looking strategy that prioritises or sequences change in coffee supply chains.

Melitta's engagement in global MSIs is channelled primarily through GCP, with limited presence in broader international or pre-competitive transformation initiatives focused on income, nature, or systemic change. Engagement is oriented more towards German and EU-based frameworks, reinforcing the impression of a compliance-driven rather than coalition-led sustainability strategy.

## German perspective

The German perspective does not differ materially from the global assessment. German communications present the same overarching sustainability strategy, centred on "Coffee of the Future", climate action, and group-wide governance, without additional coffee-specific KPIs, sourcing data, procurement volumes, or implementation evidence. The German website places more emphasis on consumer-facing sustainability messaging and the ambition to offer only "Coffee of the Future" by 2030. This reflects a different communication approach rather than a different strategy, commitments, or performance.

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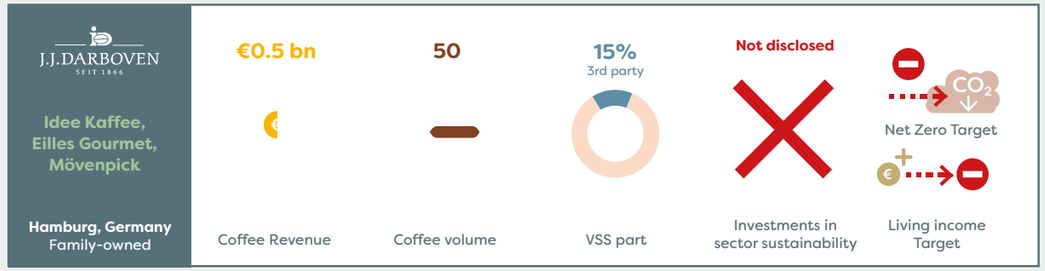
# J.J. Darboven






Founded in Hamburg in 1866, J.J. Darboven is a family-owned German coffee and hot-beverage group. It purchased 50,272 MT of green coffee in 2025, for branded retail and B2B and out-of-home markets. Its sustainability approach is strongest on climate and operational environmental management, supported by SBTi-validated targets, certification and supply-chain risk screening. Engagement at origin is concentrated in certified product lines and selected programmes, rather than a clearly defined, company-wide responsible sourcing model.

## Transparency

Darboven's Sustainability Report 2024/2025, published in August 2026, has substantially expanded its public reporting. It discloses green coffee purchases by certification category for 2023 to 2025, group-wide greenhouse-gas inventories for 2024 and 2025, and quantitative information on selected operational measures and origin projects. Climate targets and a 2030 sourcing ambition are clearly stated.

- Disclosure is well-structured and accessible, although much of the wider narrative remains descriptive.
- Progress can be tracked based on volume-based purchasing data, but disclosure of supply chain risk findings, supplier coverage, remediation and producer outcomes remains limited.

## Procurement

Darboven aims to source 100% of its green coffee responsibly by 2030, an ambition first stated in its 2023 Sustainability Report and repeated in the 2024/2025 report. However, the company does not define "responsibly sourced" or identify the standards, programmes and verification requirements that will cover all volumes. The clearest pathway is its commitment to increase coffee certified under Fairtrade, Rainforest Alliance or EU Organic standards to at least 30% by 2030. In 2025, certified purchases amounted to approximately 7,751 MT, or 15.4% of total green-coffee purchases, while the remaining 84.6% was reported as conventional.

For these conventional volumes, Darboven's procurement is supported by its Code of Conduct for Contract Partners, participation in the Ear4U grievance mechanism and a voluntary LkSG-based due-diligence process. The company is using osapiens to assess risks among strategic suppliers. However, it does not disclose supplier coverage, identified risks, grievances, remediation or evidence of effectiveness.

Darboven invests in origin projects, but these remain separate from its wider sourcing. One example is its shade-tree project, linked to specific Café Intención products. By the end of 2025, the project had planted 452,536 trees across Honduras, Peru and India. Yet Darboven does not connect these activities to its overall sourcing, nor does it explain how its stated long-term relationships influence pricing, contracts, purchasing commitments or risk sharing across its conventional coffee portfolio.

## Living income

Darboven refers to reliable or "liveable" farmer incomes as an ambition, pursued mainly through Fairtrade-certified sourcing and selected origin projects. However, it provides no living-income benchmark, income gap assessment, quantified target or measurement of farmer-income outcomes. Its activities are therefore better characterised as livelihood support than as a living-income approach.

## Environment and climate

Darboven has SBTi-validated near-term targets covering Scopes 1 and 2, non-FLAG Scope 3 and FLAG emissions, including a commitment to no deforestation across primary deforestation-linked commodities by the end of 2025. However, no long-term net-zero target has been publicly disclosed. The 2024/2025 report adds group-wide emissions inventories and a quantified decarbonisation roadmap, including coffee-specific FLAG measures related to EUDR implementation, sourcing origins and farm-level emissions.

It also shows Scope 3 emissions rising by 27.5% in 2025, driven mainly by purchased goods and services and transport, while timelines for several decarbonization roadmap measures remain under development. Darboven plans satellite-supported screening to address deforestation risk, and its shade-tree project supports agroforestry and climate resilience. However, Darboven does not disclose the share of coffee verified as deforestation-free or confirm whether it met its 2025 no-deforestation commitment.

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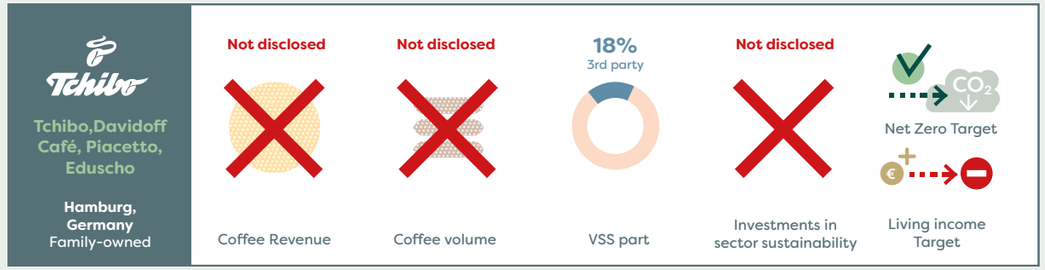
# Tchibo






Founded in Hamburg in 1949, Tchibo is a family-owned coffee group. It operates over 550 shops and 18,000 grocery depot partnerships in Germany. Beyond Europe, Tchibo distributes coffee across North America and more than 40 export markets. Its roasting operations are based in Hamburg and Berlin.

## Transparency

Tchibo does not publish a public annual financial report, but has a long-standing practice of sustainability reporting dating back to 2008. Over time, the company has developed a relatively comprehensive sustainability architecture, including climate targets, human rights due diligence processes, and origin programmes.

- Policies and long-term ambitions are clearly articulated, including climate targets and HRDD processes.
- Quantitative targets are disclosed, but coffee-specific coverage, progress, and outcomes remain fragmented.
- Implementation pathways and use of risk assessments are only partially visible over time.

## Procurement

Tchibo combines certification, origin projects, and risk-based verification in its sourcing. Currently, around 20% of its coffee carries independent third-party certification, Tchibo is increasingly shifting from certification towards a responsible sourcing model centred on Enveritas, with a commitment to reach 100% responsibly sourced coffee by 2027. Tchibo's "100% responsible sourcing" follows three steps: annual independent supply-chain assessments against 30+ criteria (Enveritas Green), targeted projects to address gaps, and annual Enveritas verification of progress and impact.

However, it remains unclear how assessment findings translate into sourcing decisions, corrective actions, and producer-level outcomes. While the company highlights a range of country-level projects, it is not transparent how these are structurally embedded across its sourcing or how many farmers are reached at scale. The absence of clear outcome-oriented objectives reinforces this transparency gap.

## Policies

Tchibo has articulated explicit Paris alignment, SBTi-validated near-term and net-zero targets, and a disclosed human rights due diligence (HRDD) approach. Its updated Supplier Code of Conduct applies to coffee and aligns with ILO standards. Nature-related commitments are less developed. Tchibo does not disclose an explicit no-deforestation policy or a stated zero-deforestation target year. While biodiversity and environmental protection are referenced in projects and narratives, and Tchibo engages with emerging nature initiatives such as the SBTN Corporate Engagement Program, these efforts have not yet translated into formal nature targets or a disclosed deforestation commitment. Audit and risk assessments are referenced, but reporting on findings, follow-up, and remediation—particularly for coffee—remains limited.

Tchibo is an active participant in several collaborative initiatives focused on research, climate resilience, and origin-level implementation. These include engagement through the CPPTF, collaboration with WCR and c&c, ICP, and participation in the SCC. Overall, Tchibo's collaboration approach is closely linked to its sourcing and sustainability strategy, with partnerships primarily focused on research, climate resilience, and origin-level implementation.

## German perspective

The German perspective largely reinforces the global assessment. Tchibo communicates a consistent sustainability strategy across its German and global channels, with no separate German sourcing targets, or performance indicators. The German website adds operational detail: Tchibo Coffee Service commits to the group targets of 100% responsibly sourced coffee by 2027 and net zero by 2045. Several retail products, including Barista, Privat Kaffee and Qbo, carry on-pack QR codes linked to Enveritas evaluations, improving consumer-facing origin information.

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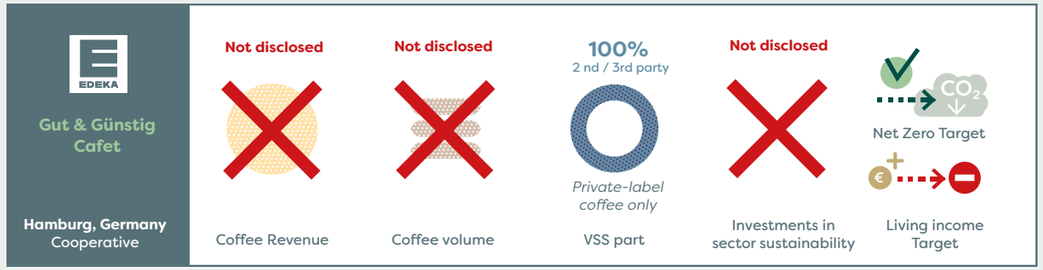
# EDEKA




EDEKA is a cooperatively organised German food-retail group headquartered in Hamburg. In 2025, it generated revenue of €77.3 billion and operated approximately 6,400 EDEKA and Marktkauf stores and 4,400 Netto Marken-Discount stores. The group also owns a smaller foodservice business, that includes the Franz Willick/Löwenkaffee roastery. This combination of full-range supermarkets and discount stores gives EDEKA a substantial position in the German coffee market. Yet EDEKA has no visible coffee sustainability strategy: its approach consists mainly of certification for private-label products and broader group policies on higher-risk commodities.

## Transparency

Coffee is effectively absent from EDEKA's main corporate reporting despite the scale of its retail business. Neither the company report nor EDEKA's principal sustainability webpages substantively mention coffee or explain how the group manages its sourcing and sustainability risks. EDEKA's most relevant coffee disclosures appear in its deforestation guideline and its progress report with WWF, which name coffee explicitly and rank it among the group's second-largest deforestation risks.

- EDEKA does not disclose coffee revenue, sales, origins, suppliers or certification volumes.
- Coffee information is spread across policy documents, statutory reporting under the Supply Chain Due Diligence Act (LkSG), and separate EDEKA and Netto disclosures, with no clear account of coverage across regional labels, foodservice coffee and third-party brands.

## Procurement

EDEKA states that all coffee-containing products in its national own-label assortment are certified under Rainforest Alliance, Fairtrade or organic standards. Netto separately reports that its entire private-label coffee assortment is certified and offers selected Fairtrade and organic products. These claims may cover a meaningful share of the group's coffee sales, particularly at Netto, where private labels are likely to have a larger role than at EDEKA. However, without sales or volume data, the combined coverage cannot be quantified. EDEKA also provides no breakdown by certification system, sourcing model, origin or chain of custody option.

EDEKA's supplier standards and human-rights processes apply across commodities, and its LkSG risk assessment identifies coffee and tea as higher-risk commodities for remuneration and working conditions. However, it does not report coffee-specific risk findings, corrective actions or outcomes. The partnership with WWF addresses coffee mainly through cross-commodity work on deforestation risk, supply-chain data, traceability and supplier engagement. EDEKA discloses no dedicated coffee-origin or farmer programme activities. It does not share information about its coffee purchasing practices, including contract duration, price-setting, premiums or risk-sharing.

## Living income

EDEKA's dedicated position paper on living wages and living incomes is a positive step. It recognises the company's responsibility, identifies coffee and tea as high-risk agricultural supply chains and identifies several areas through which it can influence incomes, including procurement practices, contractual conditions, certification and supplier engagement. However, the paper does not explain how EDEKA can implement or monitor these levers, including in coffee. The group discloses no specific activities, income benchmark, income gap assessment, target or measured outcomes, so the commitment cannot yet be linked to results at origin.

## Environment and climate

EDEKA has a strong group-level climate framework. Its SBTi-validated targets include net-zero emissions across the value chain by 2045 and a 36.4% reduction in Scope 3 FLAG emissions by 2032. However, it provides no evidence of how it implements these targets in coffee supply chains, and it does not disclose coffee-specific emissions, reduction measures or investments in agroforestry or biodiversity.

EDEKA's progress report with WWF identifies coffee as its second-largest deforestation risk among commodities. EDEKA has committed to eliminating deforestation across its primary deforestation-linked commodities by the end of 2025, in line with the Accountability Framework initiative (AFi), whose criteria were developed with WWF Germany.Its deforestation guideline applies a 2020 cut-off date to national private-label coffee. EDEKA announced a coffee-specific deforestation risk assessment for 2024, but has not published the findings. Beyond this, information on implementation remains limited with little disclosure on traceability coverage, non-compliance, remediation or progress toward the 2025 commitment.

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# REWE Group






REWE Group is a cooperatively organised retail and tourism group headquartered in Cologne. In Germany, it operates approximately 3,800 REWE supermarkets, 2,100 PENNY discount stores and more than 450 independently operated nahkauf stores. While REWE is a full-range supermarket, PENNY has a smaller discount assortment with a higher private-label share. REWE Group frames coffee sustainability primarily through its private-label portfolio.

## Transparency

REWE Group publishes extensive and relatively up-to-date sustainability information, supported by policies on human rights, fairness, living incomes, climate and responsible sourcing. These define relevant principles and due-diligence processes, but often lack time-bound objectives and evidence of how they shape commercial decisions. Coffee, although identified as a high-impact raw material, receives limited attention. Its Coffee Guideline dates from 2021 and sets three objectives, but REWE tracks only the certification objective systematically. All private-label coffee sold by REWE and PENNY has been certified since 2020.

- Reporting is strong on governance but provides little insight into the scale and evidence of REWE's coffee strategy.
- The wider policy framework defines relevant principles and due diligence processes, but often lacks time-bound objectives and evidence of how they shape commercial decisions.
- REWE does not disclose own-label coffee sales, volumes or revenue for either retailer, nor origins, suppliers or a breakdown by certification scheme. Furthermore, it does not report progress on long-term cooperative relationships or origin transparency.

## Procurement

REWE's coffee procurement rests on a requirement that all private-label coffee sold by REWE and PENNY in Germany meets Rainforest Alliance, Fairtrade or organic standards. REWE also reports that it was the first German food retailer to offer Fairtrade coffee nationally, in 1993. A broader due diligence framework covering supplier requirements, risk analysis, grievances and remediation supports this requirement. REWE integrates sustainability specialists into private-label purchasing decisions and states that social and environmental considerations inform supplier selection alongside price, quality and delivery. However, it does not disclose coffee-specific risk findings or show how these processes affect sourcing decisions.

Selected sourcing relationships illustrate engagement beyond certification. Through Café Mujer in Peru, REWE guarantees the purchase of the complete annual production of 120 women farmers at the Fairtrade minimum price, absorbing surplus coffee into other private-label products. Its relationship with the Valle de Incahuasi cooperative similarly combines certified sourcing with training and local activities. These arrangements offer more predictability than certification alone, but REWE does not disclose their duration, volumes or share of total procurement.

## Living income

REWE recognises living income as a material issue and has committed to testing and scaling relevant approaches. In 2025, it joined a pilot in Peru and Honduras through GIZ's Sustainable Agricultural Supply Chain Initiative (SASI), focusing on responsible sourcing practices and stronger producer organisations. However, REWE discloses no living-income benchmark, income-gap assessment, farmer coverage, quantified target or measured outcome. Café Mujer provides market security and training, but guarantees the Fairtrade minimum price rather than a demonstrated living income. REWE has set a relevant direction and begun testing practical approaches, but has yet to translate this work into measurable expectations for its wider coffee procurement.

## Environment and climate

REWE and PENNY Germany have SBTi-validated near-term and net-zero targets targets for its German retail operations, including a 30.3% reduction in FLAG emissions by 2030 from a 2021 baseline. Validation of the full REWE Group net-zero target was still in progress in March 2026. However, REWE does not disclose coffee's contribution to these emissions or a coffee-specific reduction pathway.

REWE reports that its private-label coffee supply chains have been deforestation- and conversion-free since the end of 2025, using a 2020 cut-off date. However, its reliance on certification and low-risk origins, alongside plans to expand physical supply chains, leaves the extent of farm-level traceability unclear. Shade-tree planting and organic inputs feature in Café Mujer, but REWE does not demonstrate a portfolio-wide approach to agroforestry, climate resilience or biodiversity.



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# Lidl






Lidl is a privately held discount retailer within the Schwarz Group, with approximately 12,900 stores internationally, including more than 3,250 in Germany. Schwarz Group's Bon Presso roastery, part of Schwarz Produktion, produces Bellarom whole-bean and ground coffee for Lidl and K-Classic coffee for Kaufland. This means that coffee roasting is partly vertically integrated at Schwarz Group level. Lidl has an extensive group-level sustainability framework, although its application and outcomes in coffee are less visible.

## Transparency

Lidl provides extensive and relatively up-to-date sustainability reporting, supported by detailed policies on raw materials, deforestation and human rights. Its documentation clearly identifies key coffee risks, responsibilities and intended controls. Lidl reports coffee performance mainly at international group level and by number of own-label products rather than by procurement volume. Bon Presso has an annual capacity of more than 50,000 MT, but Schwarz Group does not disclose how this is split between Lidl and Kaufland, or how much Lidl sources from external roasters.

- Lidl does not disclose coffee volumes, supplier and origin allocations, prices, traceability coverage, due-diligence findings or comparable producer outcomes.
- Despite a comprehensive management system, Schwarz Group provides too little quantitative data to assess coffee-specific implementation and progress.

## Procurement

Certification is Lidl's principal coffee-sourcing requirement: private-label coffee must comply with Fairtrade, Rainforest Alliance or organic standards. Lidl Germany reports 100% certification of permanently listed private-label coffee. Internationally, Lidl reports 98.4% certification for capsules, instant coffee, pads and coffee drinks, but 87.7% for whole-bean and ground coffee. These figures count products (SKUs, stock-keeping units), combine standards with different requirements and do not indicate the certified share by volume.

Lidl integrates coffee into broader human-rights and deforestation due diligence, identifying risks such as inadequate income, child and forced labour, discrimination and forest conversion. It requires coffee suppliers to comply with its Sustainable Purchasing Policy and monitors compliance through data verification tools and external assessments. Supplier requirements, monitoring systems and EUDR preparation show that sustainability is part of procurement governance. Selected initiatives in Honduras, Peru and Brazil add evidence of implementation in the coffee supply chains. However, Lidl does not disclose how much coffee these interventions cover, whether it has remediated identified problems, or how due diligence affects supplier selection and commercial terms. The evidence therefore supports a structured approach to identifying and managing risks, but does not show how effectively those risks are addressed across Lidl's coffee portfolio.

## Living income

Lidl has no quantified, portfolio-wide living-income target for coffee. Its "Way To Go" project with the COMSA cooperative in Honduras, launched with Fairtrade in 2022, combines traceable sourcing, an additional producer premium and work towards a Living Income Reference Price. This goes beyond general livelihood training by linking purchasing and a direct premium to the objective of closing the living-income gap. Beyond this pilot, Lidl participates in the SASI Retail Working Group on Coffee, which has conducted living-income baseline assessments in Peru and Honduras and is testing responsible purchasing practices and pricing models that incorporate the Living Income Reference Price. However, this work is not linked to a quantified target or disclosed share of Lidl's coffee volumes and does not yet demonstrate a systematic approach across its coffee supply chains.

## Environment and climate

Schwarz Group's SBTi-validated net-zero target for FY2050 covers Lidl. The framework includes substantial absolute reductions in operational, value chain and agricultural emissions, as well as a commitment to eliminate deforestation from priority commodities by the end of 2025. Under its "Respect Biodiversity" CSR action, coffee supply chains are bound by the Sustainable Purchasing Principle (SPP) and monitored through data verification tools.

However, Lidl does not disclose coffee's emissions footprint, its contribution to the targets or a coffee-specific decarbonisation pathway. Nor does it confirm whether it met the 2025 deforestation commitment for coffee. Projects in Peru and Vietnam address EUDR traceability, climate resilience and agroforestry; the three-year Vietnam BiC project targets 5,000 farmers, although its outcomes and share of Lidl's coffee supply are not yet reported. Lidl therefore demonstrates strong corporate ambition, without sufficient evidence that it has translated this into measurable climate, deforestation or biodiversity performance across its coffee portfolio.



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# ALDI Süd






ALDI Süd Germany operates approximately 2,000 stores and forms part of the privately held ALDI SOUTH Group, which has around 6,520 stores across 11 markets. Its limited-range discount model relies predominantly on own-label products, alongside third-party brands. Group-owned NewCoffee supplies around 40% of ALDI SOUTH's own-label coffee volume, while other roasters supply the remainder. ALDI SOUTH Group governs sustainability largely at group level, through certification, due diligence and selected origin engagement, and Germany-specific implementation is rarely visible.

## Transparency

ALDI SOUTH Group provides relatively extensive and accessible sustainability documentation. Its policies, risk assessments, supplier disclosure and coffee-specific reporting explain the main governance and due-diligence processes and acknowledge material risks in coffee production.

However, disclosure is stronger on systems and activities than on coverage and outcomes.

- Disclosure is structured and accessible, though implementation and intervention pathways are less consistently visible.
- The group does not report coffee revenue or volumes, and it aggregates most performance information across its international markets.
- Unclear implementation across ALDI Süd Germany, NewCoffee, other own-label suppliers and third-party brands.

## Procurement

ALDI SOUTH group reports that approximately 85% of its private-label coffee products come from independently certified sources, under Fairtrade, Fair Trade USA, Rainforest Alliance and 4C. For Germany, ALDI reports that 100% of its private-label coffee products are certified. Both figures are calculated by number of products rather than purchasing volume and exclude third-party brands. Alongside third-party certification, ALDI Süd also accepts selected sustainability programmes operated by coffee traders, including ofi AtSource, Sucafina Impact, and LDC RSP Advanced.

Due diligence combines supplier requirements, risk screening and assessments in higher-risk supply chains. The coffee assessment in Brazil shows that the group considers risks related to informal labour, recruitment, gender, price volatility and its own purchasing practices. However, its reporting offers little evidence on supplier findings, remediation or outcomes across the wider coffee portfolio.

Beyond certification, the group supports selected origin projects, including a project with ofi from 2021 to 2025 involving around 1,000 coffee-growing households in Honduras, focused on incomes, productivity, market access and climate resilience. However, it does not show that these activities operate at scale or influence commercial purchasing practices across its coffee portfolio. The group refers to long-term supplier relationships, but does not disclose contract duration, pricing arrangements, purchasing commitments or risk-sharing mechanisms that would demonstrate how these relationships support producers.

## Living income

ALDI SOUTH Group has a general living-income commitment and has tested benchmark-based measurement and income-improvement activities through its Honduras project. Among participating farmers assessed, the share earning above the living-income benchmark increased from 35% in 2021 to 54% in 2025. This goes further than general livelihood support and demonstrates willingness to measure outcomes. However, the group discloses no quantified living-income target for its coffee portfolio, and it remains unclear how it will integrate this experience into its purchasing practices or extend it beyond a single project.

## Environment and climate

The ALDI SOUTH Group has SBTi-validated near-term, FLAG and net-zero targets, including Scope 3 reductions and a commitment to eliminate deforestation from its primary deforestation-linked commodities by the end of 2025. This provides a credible group-level framework, but the group does not disclose a coffee-specific emissions footprint, decarbonisation pathway or implementation coverage.

The group describes certification, supply-chain mapping and EUDR preparation as its main deforestation controls. However, it does not quantify coffee-specific progress, and its disclosure does not confirm that it achieved the 2025 commitment, or that coverage is consistent across NewCoffee, other roasters and branded coffee. Climate resilience and agroforestry activities remain concentrated in selected origin projects rather than embedded in a portfolio-wide approach.



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# ALDI Nord




ALDI Nord is a privately held discount retailer headquartered in Essen, with more than 5,500 stores in eight European markets, including approximately 2,200 in Germany. Own-label products dominate its range. Its group-owned Markus Kaffee roastery in Weyhe produces more than half of its private-label Barissimo whole-bean, ground coffee and coffee-pad products. Its coffee sustainability approach rests primarily on certification, supplemented by general supply-chain due diligence and one origin programme in Colombia.

## Transparency

ALDI Nord's coffee reporting relies mainly on the Sustainability Report 2023, published in October 2024, so the available performance data are relatively dated. More recent documents, such as the 2025 human rights policy statement and issue-specific policies, address corporate due diligence in general rather than providing updated information on its coffee performance.

- Aldi Nord's documentation is fragmented, its coffee webpages offer limited scope and detail, while its Coffee Purchasing Policy dates back to 2016.
- The company discloses no revenue, coffee volumes, origins, supplier coverage, traceability, risk findings, remediation or farmer outcomes.
- Reporting highlights selected policies and activities but little basis for assessing current implementation or outcomes across the portfolio.

## Procurement

ALDI Nord reports that 75.7% of its total own-label coffee sourcing volume across its markets was certified in 2023, down from 79.4% in 2022. In Germany, the share was 73.7%. Rainforest Alliance accounted for approximately 94% of certified coffee, with Fairtrade and organic making up the remainder. ALDI Nord reports working towards 100% certified coffee but sets no target date. It has also warned that supply constraints may reduce the Rainforest Alliance content of some Barissimo products from the second quarter of 2026, and intends to increase certified sourcing again once sufficient volumes are available. It does not disclose the cause of the constraints, the volumes affected or the expected duration.

General supplier standards, risk analysis and grievance procedures provide a due diligence framework, but ALDI Nord does not report how it applies these to coffee or what the findings are. Beyond certification, it runs a programme with HRNS and SKN Caribecafé (2019–2026) in Colombia that supports smallholders through training, gender inclusion and market access. The programme is not linked to total coffee volumes or wider sourcing requirements. ALDI Nord does not disclose commercial purchasing practices, such as contract duration, pricing or risk sharing.

## Living income

ALDI Nord's general human-rights disclosure recognises that incomes in global supply chains may fall below a living income, but this statement is not specific to coffee. For coffee, the company discloses no benchmark, income-gap assessment, quantified target or measured outcome. The Colombia programme addresses livelihoods but is not presented as a living-income programme. Without these elements it remains unclear how ALDI Nord intends to address farmer incomes through its coffee purchasing.

## Environment and climate

ALDI Nord has an SBTi-validated target to reduce Scope 1 and 2 emissions by 55% by 2030 against a 2020 baseline. Its Sustainability Report 2023 records reductions of 39% group-wide and 65% in Germany by 2023. Its Scope 3 target concerns supplier target-setting rather than emissions reductions, and the company does not report whether it met its 2024 milestone. It discloses no validated net-zero or FLAG target, no group-wide Scope 3 footprint, and no coffee footprint or coffee-specific decarbonisation pathway.

A 2030 deforestation- and conversion-free commitment covers coffee. ALDI Nord describes implementation mainly through certification and EUDR preparation, without reporting coffee-specific traceability, geolocation coverage or risk results. It reports no portfolio-wide coffee programmes on agroforestry, regenerative agriculture or biodiversity.

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Science Based Targets initiative (2022), ALDI Einkauf SE & Co. oHG target record

List of abbreviations
Endnotes
Sources of Figures
Bibliography
Imprint





## List of abbreviations

| | |
|---|---|
| 4C | Common Code for the Coffee Community, since 2025: Certification for Climate, Conservation and Communities |
| BAFA | Federal Office for Economic Affairs and Export Control |
| BHRS | Business and Human Rights Centre |
| BMAS | Federal Ministry of Labour and Social Affairs |
| BMWE | Federal Ministry for Economic Affairs and Energy |
| BMZ | Federal Ministry for Economic Cooperation and Development |
| c&c | initiative for coffee&climate |
| CB | Coffee Barometer |
| CI | Conservation International |
| CIR | Christliche Initiative Romero |
| COMSA | Café Orgánico Marcala Cooperative |
| CPPTF | Coffee Public–Private Task Force |
| CSDDD | Corporate Sustainability Due Diligence Directive |
| CSRD | Corporate Sustainability Reporting Directive |
| DB | Deutscher Bundestag (German Federal Parliament) |
| DKV | Deutscher Kaffeeverband (German Coffee Association) |
| ECF | European Coffee Federation |
| EmpCo | Empowering Consumers for the Green Transition Directive |
| EU | European Union |
| EUDR | EU Deforestation Regulation |
| FIAN | FoodFirst Information and Action Network |
| FLAG | Forest, Land and Agriculture |
| FLR | Forced Labour Regulation |
| GCP | Global Coffee Platform |
| GHG | Greenhouse gas |
| GIZ | German Agency for International Cooperation |
| GPS | Global Positioning System |
| ICA | International Coffee Agreement |
| ICO | International Coffee Organization |
| ICP | International Coffee Partners |
| IDH | IDH, the Sustainable Trade Initiative |
| LDC | Louis Dreyfus Company |
| LIRP | Living Income Reference Price |
| LkSG | Lieferkettensorgfaltspflichtengesetz / Supply Chain Due Diligence Act |
| NGO | Non-governmental organisation |
| NKG | Neumann Kaffee Gruppe |
| RSP | Responsible Sourcing Programme |
| SASI | Sustainable Agricultural Supply Chains Initiative |
| SBTi | Science Based Targets initiative |
| SCC | Sustainable Coffee Challenge |
| SCTG | Specialty Coffee Transaction Guide |
| VOCAL | Voice of Organizations in Coffee Alliance |

## Endnotes

1. Equivalent to roughly 620,000 to 645,000 tonnes of green coffee.
2. In 2021, four companies together accounted for 56% of all coffee sales in Germany (BASIC 2024).
3. Among them Dallmayr's subsidiary Schirmer Kaffee.
4. Scope 1 and 2 cover the emissions a company causes directly in its own operations, such as roasting and transport, and through the energy it buys. Scope 3 covers all other emissions in its value chain, and for coffee companies these are by far the largest share, mostly from growing coffee on farms, including land-use change and fertiliser use.



## Sources of Figures

**Figure 1. The German coffee market**
Unless stated otherwise, facts and figures on the German coffee market are based on information from the German Coffee Association (DKV) and the European Coffee Federation (ECF): the DKV's annual market figures for 2025 (DKV 2026) and the German results of the ECF study Economic Impact of Coffee in Europe (ECF 2026).

**Figure 2a + 2b. The transparency gap in roaster and retailer reporting**
Basic data points across the 11 main sector players remain largely intransparent, and the limited information disclosed in publicly available company reports and websites means that only confirmed data could be included here; resulting in an incomplete picture that itself illustrates the scale of the transparency gap.

**Green coffee conversion**
1 bag = 60 kilogram
1 MT = 1,000 kilograms = 16.67 bags

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We are grateful to the companies that shared information with us. Additional background information, together with an overview of the contributing organisations, is available on the Coffee Barometer website. Responsibility for the content and views expressed in this report rests solely with the authors, who welcome any corrections or updates to the data presented. We challenge all actors across the coffee sector to make more information publicly available on the social, environmental, and economic challenges shaping the sector. Transparency is not optional; it is a precondition for meaningful progress.

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