



Yunnan Arabica Coffee Beans

# COFFEE

## 咖啡

### Overview

Yunnan is endowed with sound natural conditions for the cultivation of Arabica coffee and a time-honored history. After nearly 70 years of development, Yunnan has become the largest coffee cultivation region and a center for trade and export of coffee. “Yunnan coffee” has become a vital part of the distinctive agricultural products from Yunnan. Much like Colombia, Yunnan is endowed with sound geographical and climate conditions suitable for the growth of Yunnan Arabica coffee. It is the place where 98% of China’s coffee is produced; it is also a center of trade and export of coffee. The industry has irreplaceable strengths in China for the development of coffee industry. Yunnan borders with other major coffee producing areas in Asia and is endowed with green organic soil, sound climate and other favorable natural conditions. Besides, the neighbouring coffee-producing countries are participating countries of the Belt and Road Initiative. This has created favorable conditions for Yunnan to engage in cooperation with the surrounding countries on production capacity. “Yunnan Coffee” is aiming to embrace the world, create a “green brand” and improve the competitiveness of its coffee product in the international market. Besides, it also aims to build Yunnan into an important coffee producing area in the world, a main deep-processing base and a coffee trading center in Asia.

## 综述

云南省有种植小粒种咖啡的优越自然条件和悠久种植历史。经过近 70 年的发展，云南已经成为中国最大的咖啡种植地、贸易集散地和出口地，“云南咖啡”已成为独具特色的“云系”农产品的重要组成部分。云南与哥伦比亚极其相似，得天独厚的地理环境、气候条件特别适合小粒咖啡生长，是我国 98% 的咖啡产地、贸易集散地和出口地，产业在国内具有不可替代的优势。毗连亚洲咖啡主产区，拥有绿色有机种植的土壤、气候等自然条件，这些国家都在“一带一路”范围内，开展咖啡产能合作的条件优越。“云咖”正在放眼世界，打造云南咖啡“绿色品牌”，提升云南咖啡在国际市场的竞争力，把云南建成全球精品咖啡重要产区、亚洲重要的咖啡精深加工基地和亚洲咖啡交易中心。

## Industry Mix

### 1. Scale of Cultivation

In 2017, the cultivation area of coffee reached 1.77 million mu in Yunnan, accounting for 98% of China's total and 1.1% of the world. Coffee bean production stood at 136,000 tons, accounting for 98% of China's total and 1.5% of the world, ranking the 13th globally. The output of the industry reached 2.59 billion RMB. More than 1 million farmers from over 300,000 households were engaged in coffee production. Coffee planting areas can be found in 12 prefectures (or cities) and 44 counties (or districts), in which major production areas are located in Pu'er, Lincang, Dehong, Baoshan, and Xishuangbanna. More than 100 varieties of coffee have been planted. In particular, the cultivation area of Catimor 7963, a variety of coffee improved by combining Timor and caturra, covers 90% of the total in Yunnan. Sackheim takes up 5-10% of the total cultivation area. Other varieties, such as Typica, Bourbon and S288, were also planted in Yunnan in a relatively smaller scale.

### 2. Industry Scale

Over the last 10 years, a number of coffee-processing enterprises have emerged in Yunnan. An industrial chain has initially taken shape. At present, there are 800 coffee-processing companies in Yunnan, in which one stands as a pace-setter in China and 10 are leading enterprises in Yunnan. There are 113 peeling factories with a processing capacity of less than 1000 tons, 15 with a capacity of 1000-5000 tons and 4 with a capacity of over 5000 tons. There are 2 freeze-drying or spray-drying instant coffee processing companies, 50 coffee bean and power roasting companies, and 30 exporting companies. There are 10 companies with a sales volume of over 50 million RMB and 4 have exceeded 100 million RMB.

### 3. Competitiveness of Local Brands

Since the 13th Five-year Plan, a number of competitions have been held on green beans, cupping and brewing of coffee. A number of Geographical Indications have been granted. Yunnan has gained a reputation of the “Capital of Coffee” and the “Homeland of Coffee”. There are over 10 coffee training academies, more than 100 professional coffee shops, more than 100 instant coffee shops such as Starbucks, McDonald's, Dicos and local coffee shops, and more than 100 four-star or five-star hotel coffee bars. A number of coffee cultural center, coffee towns and



coffee industries have emerged in Yunnan. There are also a number of famous coffee brands in Yunnan, such as Hogood, Aini, Beigui, Arabica Star, Jinglan, Yunlu, Betaon and Gongyu, etc.

## Major Enterprises

Dehong Hogood Coffee Co., Ltd. is the first local coffee brand and the only enterprise that has obtained the well-known trademark of the coffee industry in China. Hogood Coffee has successively built instant coffee production lines with a capacity of 33,000 tons, ending the situation of European monopoly in coffee equipment manufacturing.

Yunnan Aini Group, founded in 2006 in Pu'er that is known as the “capital of coffee” in China, is the only partner with Starbucks in the Asia-Pacific region and is a national leading enterprise of agricultural industrialization. Aini Group adheres to the business concept of “balancing development and environment protection”. The enterprise adopts a “government leading, enterprise operating, technology supporting

and farmers participating” mode in its efforts to manage coffee cultivation. The company has already formed an integrated industry chain.

Yunnan Farms Agribusiness Coffee Co., Ltd. (formerly Yunnan Coffee Factory) is a joint venture company established in 2017 by Yunnan Farms Agribusiness Group and Shanghai Coffee Trading Center. It is a major business carrier of Yunnan Farms Agribusiness Group in coffee industry. The company was established in 1992 under the Coffee Cooperation Project between the Chinese government and the United Nations Development Program (UNDP). The company boasts a three-in-one instant coffee production line with a capacity of 5000 tons, and a 1200-ton roast coffee production line. In December 2004, the company passed the certification of ISO9001:2000 quality management system and the HACCP food safety management system. The company is also the first to pass the certification of HACCP food safety management system in the coffee industry in China.



Yunnan Arabica Coffee Trees

## 结构

### 1. 种植规模

2017 年全省咖啡种植面积 177 万亩，咖啡生豆产量 13.6 万吨，均占全国的 98%，面积占全球的 1.1%，产量占全球 1.5%，排名全球第 13 位。全省农业总产值 25.9 亿元，咖农 30 多万户 100 余万人。12 个州（市）44 个县（区）种植，集中于普洱、临沧、德宏、保山、西双版纳等五个核心区。品种超过 100 个，但种植最多的是蒂姆种（Timor）与波邦突变种卡杜拉（caturra）混合改良形成的卡蒂姆 7963 及其系列，约占总面积的 90%，萨奇姆约占 5-10%，还有少量铁皮卡（typica）、波邦（bourbon）、S288 等。

### 2. 产业规模

十多年来，云南培育了一批深加工企业，产业链初步形成。目前有 800 多家，国家级龙头企业 1 家、省级 10 余家；1000 吨以下脱皮工厂 113 家，1000 ~ 5000 吨的脱壳分级加工厂 15 家，5000 吨以上脱壳分级加工厂 4 家；冻干、喷干速溶粉加工企业 2 家，焙炒豆、焙炒粉加工企业 50 余家，外贸出口企业 30 家。鲜果加工能力超过 150 万吨，冻干、喷干能力超过 3 万吨；销售额 5000 万元以上 10 家、超亿元的 4 家。

### 3. 品牌规模

“十三五”以来，开展了系列“生豆”“杯品”“冲煮”等大赛；获得了一批地理产品商标，被授予了中国咖啡之都“咖啡之乡”等称号；诞生了咖啡师培训学校 10 余家；专业咖啡门店 100 余家；星巴克、麦当劳、

德克士、本土即饮咖啡店 100 余家；四星、五星级酒店咖啡吧 100 余家；咖啡文化馆、咖啡小镇、咖啡产业园相继产生。培育了一批咖啡品牌：“后谷”“爱妮”“北归”“阿拉比卡星”“景兰”“云潞”“比顿”“共语”等。

## 重点企业

德宏后谷咖啡有限公司：中国第一个本土咖啡品牌，也是唯一一个获得咖啡全产业链企业中国驰名商标的品牌。后谷咖啡先后建成 33000 吨速溶咖啡生产线，结束了欧洲垄断咖啡设备装备制造的历史。

云南爱妮集团：云南爱妮集团 2006 年组建于“中国咖啡之都”普洱，是星巴克亚太地区唯一合作伙伴，国家级农业产业化重点龙头企业。爱妮始终坚持“开发与保护并重”的经营理念，采用“政府牵头 + 企业运作 + 科技支撑 + 农户参与”运营模式，开展咖啡种植管理工作，已建成“从种子到杯子”的全程咖啡产业链。

云南农垦咖啡有限公司（原云南咖啡厂）：是云南农垦集团与上海咖啡交易中心于 2017 年合资组建的公司，作为云南农垦在咖啡产业上的业务承载主体；是中国政府——联合国开发计划署（UNDP）咖啡合作项目单位，于 1992 年建成投产，拥有一条 5000 吨三合一速溶咖啡生产线和一条 1200 吨焙炒咖啡生产线。于 2004 年 12 月通过了 ISO9001：2000 质量管理体系及 HACCP 食品安全管理体系认证，是全国咖啡行业中首家通过 HACCP 食品安全管理体系认证的企业。

