Mapping the Growing Sector of Voluntary Sustainability Standards:
Current State and Trends

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Partners

- Research Institute of Organic Agriculture (FiBL)
- International Trade Centre (ITC)
- International Institute for Sustainable Development

Supporter

- The Swiss State Secretariat for Economic Affairs SECO
Selected VSS

- 4C (Global Coffee Platform)
- Better Cotton Initiative (BCI)
- Bonsucro
- Cotton Made in Africa
- Fairtrade International
- Forest Stewardship Council (FSC)
- GLOBALG.A.P.
- IFOAM – Organics International
- Programme for the Endorsement of Forest Certification (PEFC)
- ProTerra Foundation
- Rainforest Alliance/Sustainable Agriculture Network
- Roundtable on Sustainable Palm Oil (RSPO)
- Round Table on Responsible Soy (RTRS)
- UTZ
Selected commodities

- Bananas
- Cocoa
- Coffee
- Cotton
- Oil palm
- Soybeans
- Sugarcane
- Tea
- Forestry
**Voluntary Sustainability Standards (VSS) area worldwide and selected commodities**

Source: FiBL-IISD-ITC survey 2017; 4C 2016; Better Cotton Initiative 2017; Bonsucro 2016; Cotton Made in Africa 2016; Fairtrade International 2017; GLOBALG.A.P. 2016; FiBL survey 2017; ProTerra Foundation 2016; Rainforest Alliance/SAN 2016; Roundtable of Sustainable Palm Oil 2016; Round Table for Responsible Soy 2016; UTZ 2016

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**Total harvested area certified for selected crops per VSS 2015**

**Total certified area per VSS 2015**
Cocoa area share of total VSS area 2015
Source: FiBL-IISD-ITC survey 2017; Fairtrade International 2017; FiBL survey 2017; Rainforest Alliance/SAN 2016; UTZ 2016

Coffee area share of total VSS area 2015
Source: FiBL-IISD-ITC survey 2017; Fairtrade International 2017; FiBL survey 2017; Rainforest Alliance/SAN 2016; UTZ 2016
Distribution of the cocoa area by region 2015
Source: Fairtrade International 2017; FiBL survey 2017; Rainforest Alliance/SAN 2016; UTZ 2016

Distribution of the tea area by region 2015
Source: Fairtrade International 2017; FiBL survey 2017; Rainforest Alliance/SAN 2016; UTZ 2016
Coffee: Development of the area by VSS 2008-2015
Source: 4C 2016; Fairtrade International 2017; FiBL survey 2017; Rainforest Alliance/SAN 2016; UTZ 2016

Coffee: Range of coffee area (minimum/maximum/average) 2008-2015
Source: FiBL-IISD-ITC survey 2017
Cocoa: Development of the area by VSS 2008-2015
Source: Fairtrade International 2017; FiBL survey 2017; Rainforest Alliance/SAN 2016; UTZ 2016

Cocoa: Range of cocoa area (minimum/maximum/average) 2008-2015
Source: FiBL-IISD-ITC survey 2017
The State of Sustainable Markets 2017
Statistics and Emerging Trends


- The 2018 edition of “The State of Sustainable Markets” will be launched at the 2018 ISEAL Conference, Sao Pablo, May 2018
Conclusions

• All standards in the report continue to show growth of total certified area, albeit not at the same pace as in the past.

• There is a dominance of single-sector standards in some sectors, like 4C in coffee or BCI in cotton.

• Multiple certification takes place in almost all of the selected products, which makes it challenging to report a global total for the given product.

• Market data: retail sales and international trade data is not available for most of the VSS – currently it is only available for organic and Fairtrade.

• Better data will improve our understanding of the state of sustainable markets, and better reporting will help fill out the picture of sustainable supply chains.

• The labels covered in this report focus on a small range of products, and organic covers almost the whole product range. Currently, organic is the largest label in terms of number of producers, certified area, and retail sales value.