Global survey on Voluntary Sustainability Standards (VSS)

Key figures

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Partners

› Research Institute of Organic Agriculture (FiBL)

![FiBL](https://www.fibl.org)

› International Trade Centre (ITC)

![International Trade Centre](https://www.itc.int)

› International Institute for Sustainable Development

![IISD](https://www.iisd.org)

Supporter

› The Swiss State Secretariat for Economic Affairs SECO

![SECO](https://www.seco.admin.ch)
The State of Sustainable Markets
Statistics and Emerging Trends 2015


List of VSS

- 4C Association
- 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 for Sustainable Palm Oil (RSPO)
- Round Table for Responsible Soy (RTRS)
- UTZ Certified
VSS FiBL-IISD-ITC survey on VSS

› **Indicators:**
  › **Area:**
    › Area fully converted, and in conversion, and total area (including in conversion)
    › Total area harvested
  › **Production:**
    › Production volume in metric tons and value in million USD
    › Production sold under the VSS label in metric tons
  › **Operators:**
    › Producers, processors, importers, exporters, traders (retailers, wholesalers), other types
  › **Trade:**
    › Export volume in metric tons and value in million USD
    › Export price in USD; annual average per ton FOB
    › Import volume in metric tons and value in million USD
  › **Market:**
    › Domestic market volume in metric tons and value in million USD
  › **Multiple certification:**
    › Area, production, operators
VSS FiBL-IISD-ITC survey

› **Methodology and scope**
  › Common indicators and commodities: The aim is to collect as much information available as possible
  › Selected agricultural commodities: bananas, cocoa, coffee, cotton, palm oil, soybeans, sugarcane, and tea
  › Forestry: area data, operators (forest managers/owners and chain of custody)
  › Full set of data: apart of the selected commodities, the VSS were asked to provide data for all the commodities they certified

› **Data providers and data sources**
  › A part of the covered VSS, a wide range of experts were contacted and VSS annual reports were used
Voluntary Sustainability Standards (VSS) area worldwide and selected commodities

Total harvested area certified for selected crops per VSS 2014

<table>
<thead>
<tr>
<th>Voluntary Sustainability Standards</th>
<th>Million hectares</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organic (2013)</td>
<td>43.2</td>
</tr>
<tr>
<td>Rainforest Alliance</td>
<td>3.2</td>
</tr>
<tr>
<td>GLOBALG.A.P.</td>
<td>3.1</td>
</tr>
<tr>
<td>RSPO</td>
<td>2.6</td>
</tr>
<tr>
<td>Fairtrade</td>
<td>2.4</td>
</tr>
<tr>
<td>UTZ</td>
<td>2.0</td>
</tr>
<tr>
<td>BCI</td>
<td>1.6</td>
</tr>
<tr>
<td>4C (2013)</td>
<td>1.5</td>
</tr>
<tr>
<td>ProTerra</td>
<td>1.5</td>
</tr>
<tr>
<td>Bonsucro</td>
<td>1.2</td>
</tr>
<tr>
<td>BCI</td>
<td>1.0</td>
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<tr>
<td>CmiA</td>
<td>0.6</td>
</tr>
<tr>
<td>RTRS</td>
<td>0.5</td>
</tr>
</tbody>
</table>

Source: FiBL-IISD-ITC survey 2015; 4C Association 2015 (data 2013); Better Cotton Initiative 2015 (data 2013); Bonsucro 2015; Cotton Made in Africa 2015; Fairtrade International 2015; Global Gap 2015; FiBL-IFOAM survey 2015 (data 2013); ProTerra Foundation 2015; Rainforest Alliance/SAN 2015; Roundtable of Sustainable Palm Oil 2015; Round Table for Responsible Soy 2015; UTZ Certified 2015
Growth of VSS compliant area worldwide 2008-2013 (selected crops)

Minimum possible

Source: FiBL-IISD-UTC survey 2015; 4C Association; Better Cotton Initiative; Bonsucro; Cotton Made in Africa; Fairtrade International; Global Gap; FiBL-IFOAM survey; ProTerra Foundation; Rainforest Alliance/SAN; Roundtable of Sustainable Palm Oil; Round Table for Responsible Soy; UTZ Certified.

Cocoa area share of total VSS area 2014

Source: Fairtrade International 2015; FiBL survey 2015 (data 2013); Rainforest Alliance/SAN 2015; UTZ 2015
Distribution of the cocoa area by region 2014
Source: Fairtrade International 2015; FiBL survey 2015 (data 2013); Rainforest Alliance/SAN 2015; UTZ Certified 2015

Fairtrade International
- Latin America
  - Africa - Middle East

Organic
- Africa
- Latin America
- Africa - Middle East

Rainforest Alliance
- Asia
- Latin America
- Africa

UTZ Certified
- Latin America
- Asia
- Africa

Distribution of the tea area by region 2014
Source: Fairtrade International 2015; FiBL survey 2015 (data 2013); Rainforest Alliance/SAN 2015; UTZ Certified 2015

Fairtrade International
- Asia & Oceania
  - Africa & Middle East
  - Asia

Organic
- Other

Rainforest Alliance
- Europe
- Latin America
- Asia

UTZ Certified
- Latin America
- Asia
- Africa
Area covered by each VSS

Total harvested area certified by crop for selected crops and selected VSS 2013

Source: FiBL-IISD-ITC survey 2015: 4C Association; Better Cotton Initiative; Bonsucro; Cotton Made in Africa; Fairtrade International; Global Gap; FiBL-IFOAM survey; ProTerra
Cocoa: Development of the area by VSS 2008-2014
Source: Fairtrade International 2015; FiBL survey 2015; Rainforest Alliance/SAN 2015; UTZ Certified 2015

Cocoa: Range of cocoa area (minimum/maximum/average) 2008-2013
Source: Fairtrade International 2015; FiBL survey 2015; Rainforest Alliance/SAN 2015; UTZ Certified 2015
Coffee: Development of the area by VSS 2008-2014

Source: 4C Association 2015; Fairtrade International 2015; FiBL survey 2015; Rainforest Alliance/SAN 2015; UTZ Certified 2015

Coffee: Range of coffee area (minimum/maximum/average) 2008-2013

Source: 4C Association 2015; Fairtrade International 2015; FiBL survey 2015; Rainforest Alliance/SAN 2015; UTZ Certified 2015
Fairtrade and Organic: The largest markets for organic and Fairtrade products 2014

The ten countries with the largest markets for organic products 2014

Source: FiBL-AMI survey 2016 and Fairtrade annual repost 2014-2015 (US data is not included)

- Germany: 7,910 million Euros
- France: 4,830 million Euros
- China: 3,701 million Euros
- Canada: 2,728 million Euros
- UK: 2,307 million Euros
- Italy: 2,145 million Euros
- Switzerland: 1,817 million Euros
- Sweden: 1,402 million Euros
- Austria: 1,065 million Euros
- Japan: 1,000 million Euros

Organic sales
Fairtrade sales
Conclusions

› Most of this VSS are growing very fast reaching high growth rates, but organic still has the lead with the most hectares certified worldwide

› These labels focus on a small range of products, and organic covers almost the whole product range

› Multiple certification takes place in almost all of the selected commodities, which makes it challenging to avoid double counting

› Market data: retail sales and international trade data is not available for most of the VSS