



EXCELLENCE FOR SUSTAINABILITY

Research Institute of Organic Agriculture
Forschungsinstitut für biologischen Landbau
Institut de recherche de l'agriculture biologique



Global survey on Voluntary Sustainability Standards (VSS)

Key figures

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Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, February 2017



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**



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

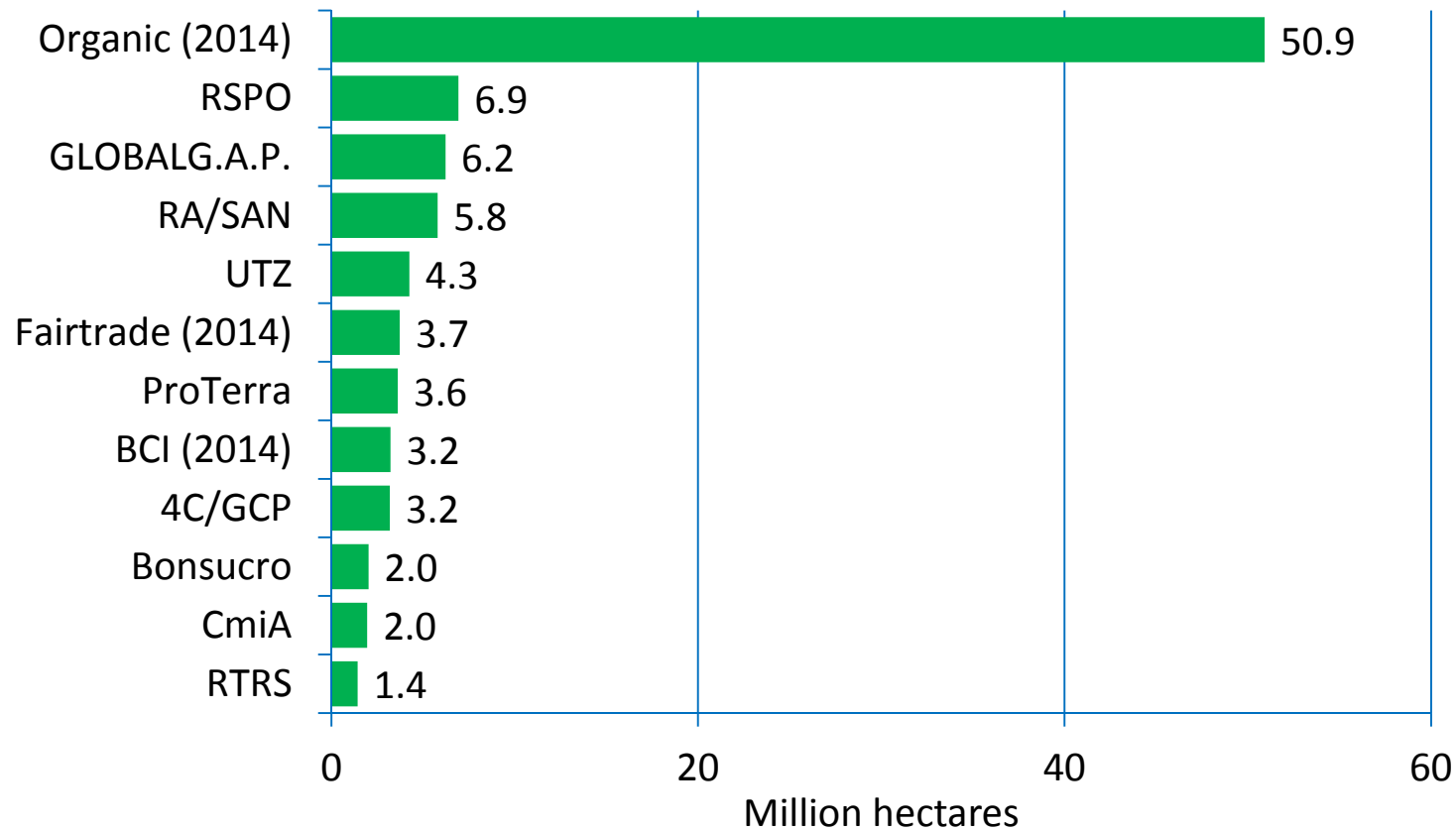
› Data providers and data sources

- › A part of the covered VSS, a wide range of experts were contacted and VSS annual reports were used

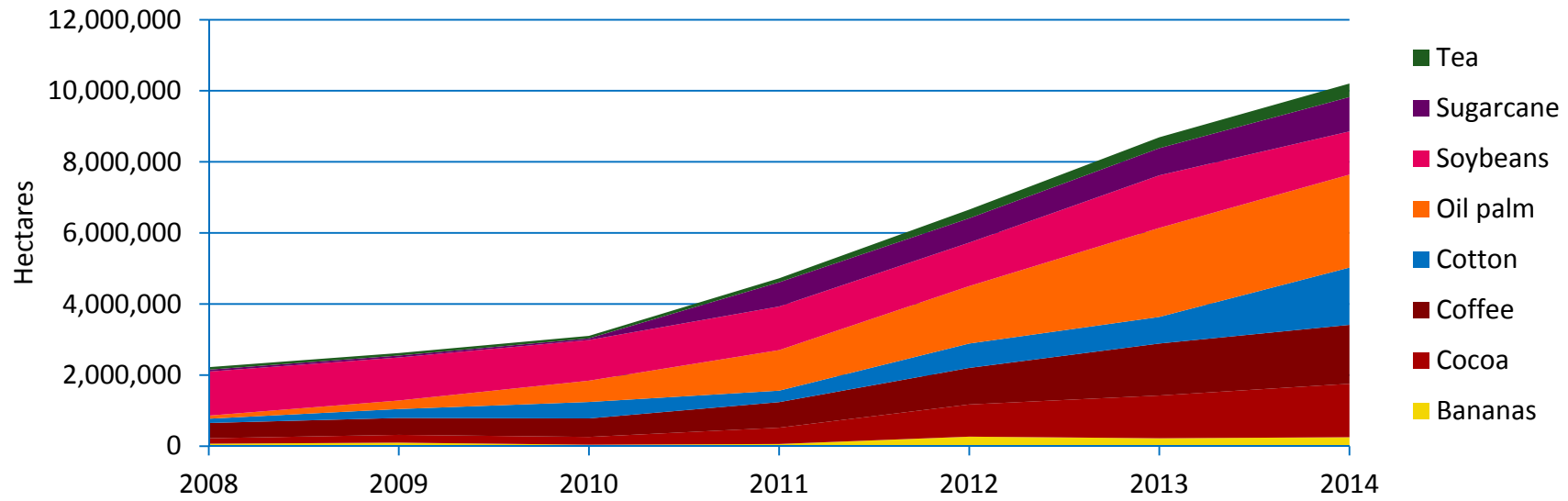
Voluntary Sustainability Standards: Total area by standard 2015

Total certified area per VSS 2015

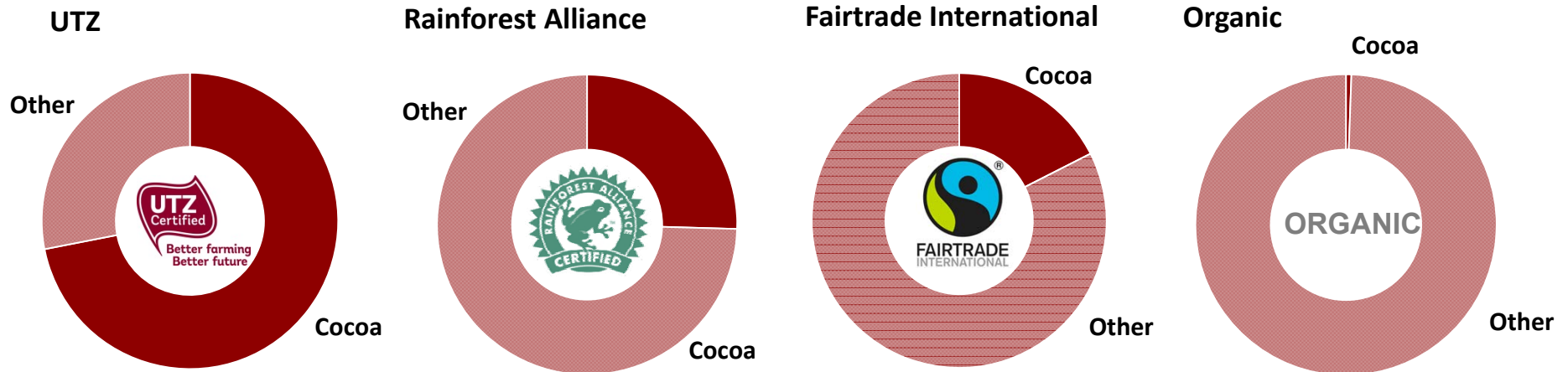
Source: FiBL-IISD-ITC survey 2016



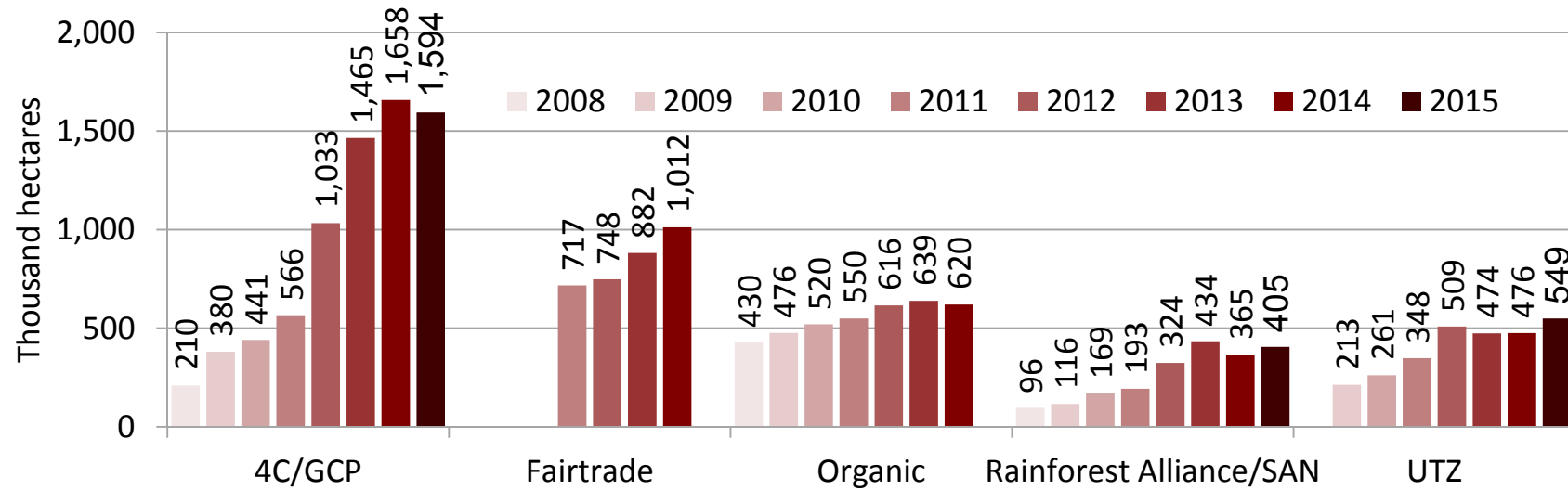
VSS compliant area worldwide: Growth of Selected Crops 2008-2014 (minimum possible)



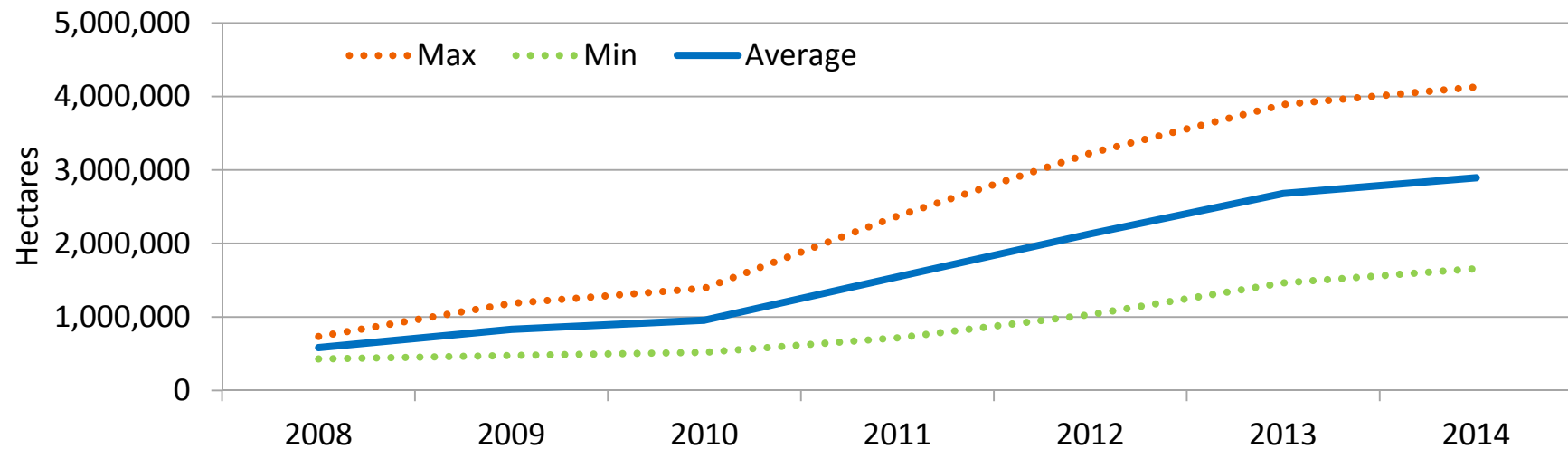
Cocoa: Area Share of Total VSS Area 2015



Coffee: Development of the area by VSS 2008-2015

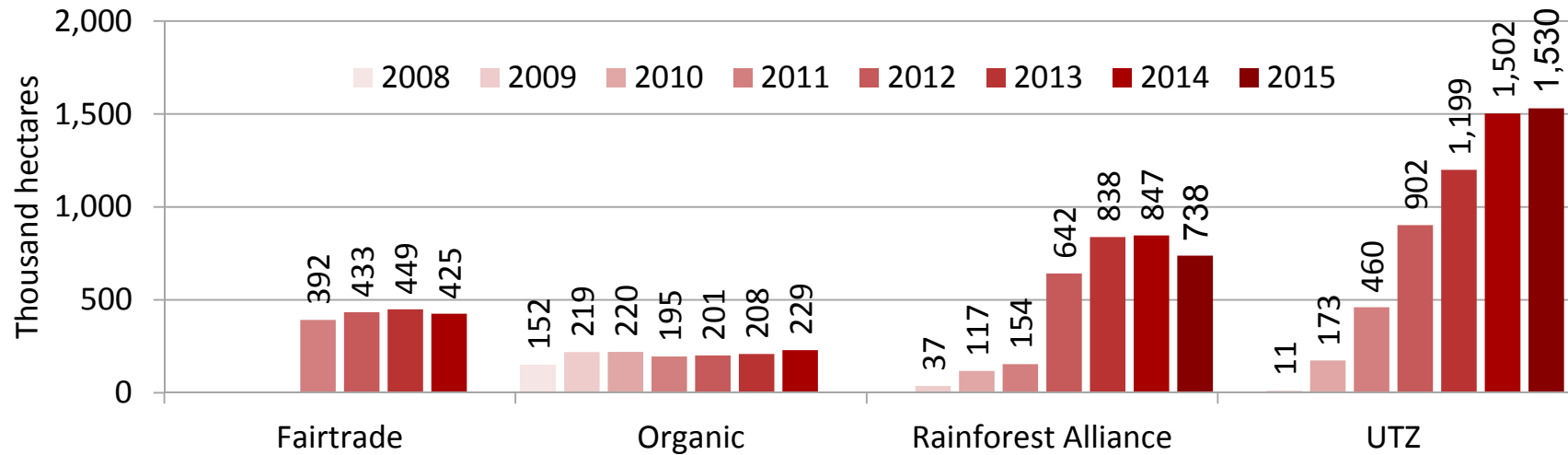


Coffee: Range of coffee area (minimum/maximum/average) 2008-2014



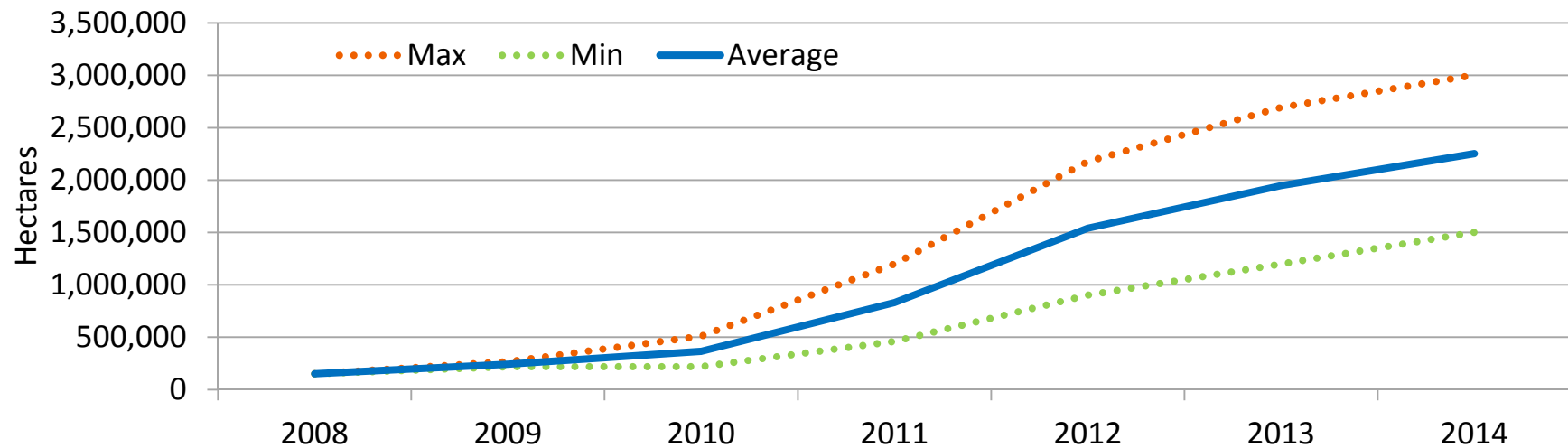
Cocoa: Development of the area by VSS 2008-2015

Source: Fairtrade International 2015 (data 2014); FiBL survey 2016 (data 2014); Rainforest Alliance/SAN 2016; UTZ 2016



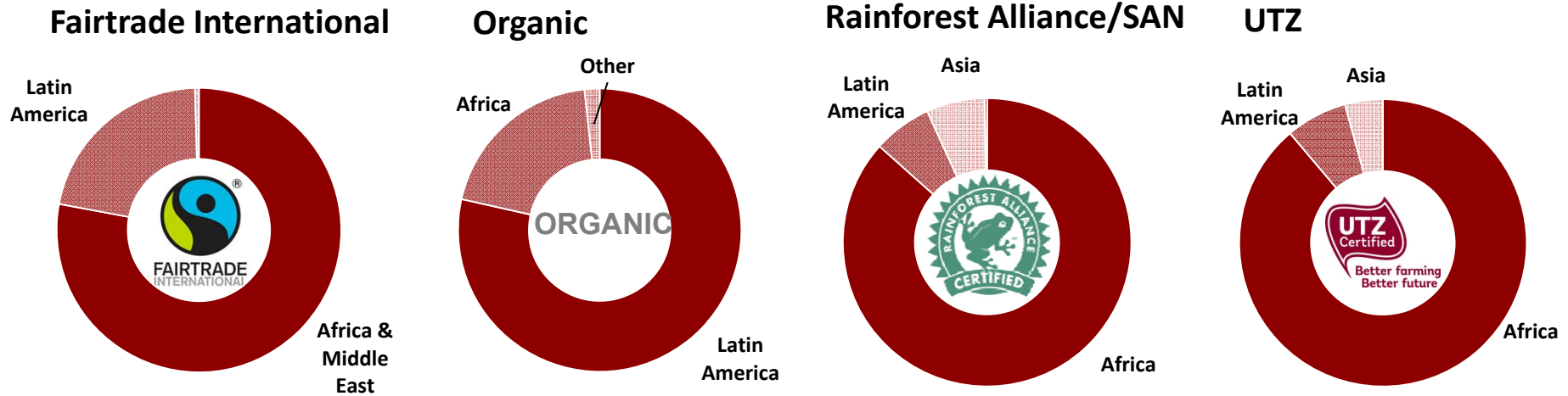
Cocoa: Range of cocoa area (minimum/maximum/average) 2008-2014

Source: Fairtrade International 2015; FiBL survey 2016; Rainforest Alliance/SAN 2015; UTZ 2015



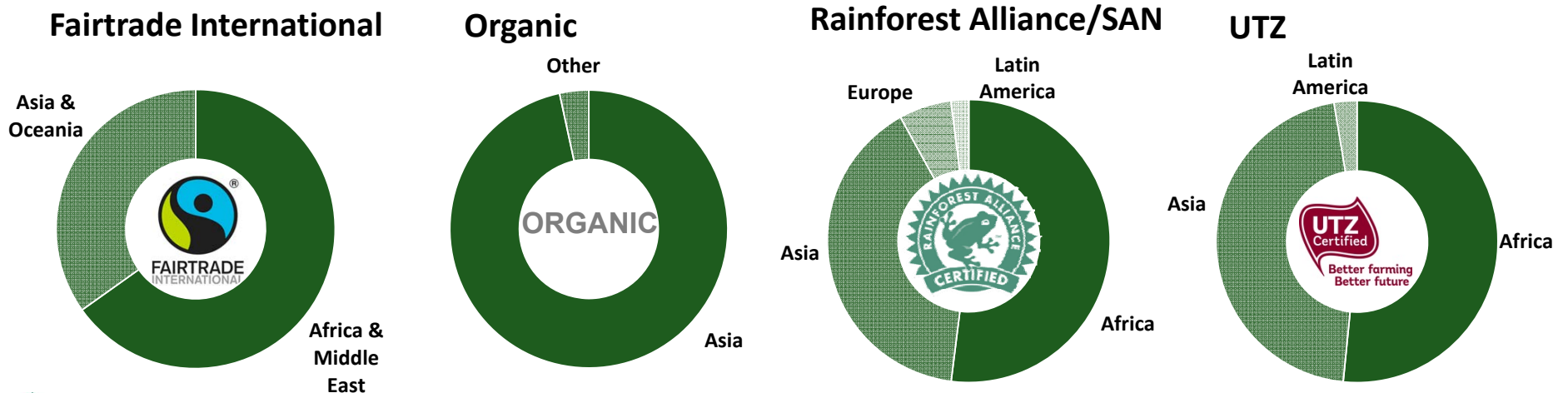
Distribution of the cocoa area by region 2015

Source: Fairtrade International 2015 (data 2014); FiBL survey 2016 (data 2014); Rainforest Alliance/SAN 2016; UTZ 2016



Distribution of the tea area by region 2015

Source: Fairtrade International 2015 (data 2014); FiBL survey 2016 (data 2014); Rainforest Alliance/SAN 2016; UTZ 2016



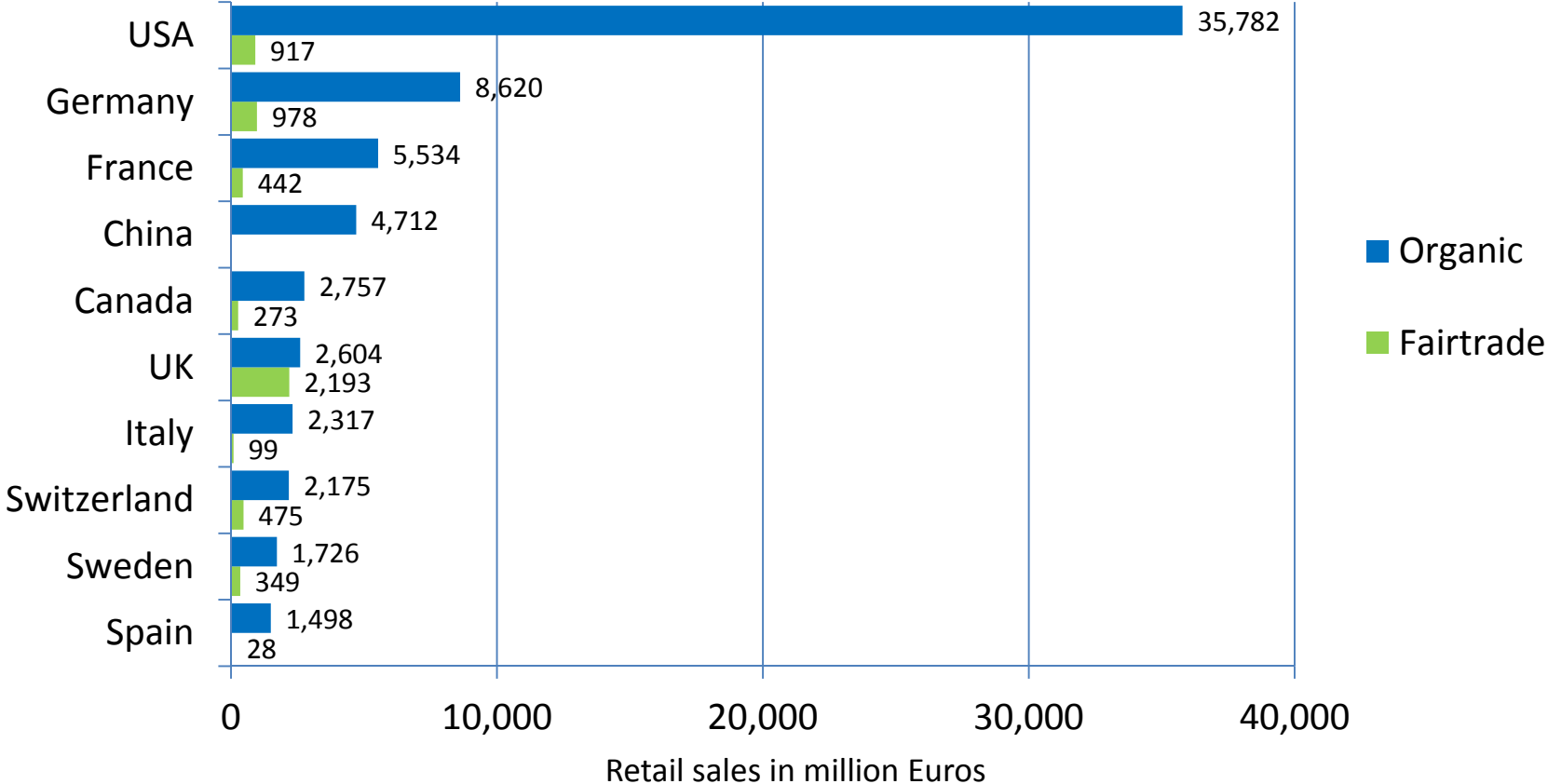
The organic and the Fairtrade markets

- › Since 2000, when the global market for organic food was at approximately 16.5 billion euros (Organic Monitor), it has more than quadrupled, reaching **approx. 75 euros in 2015**. According to Fairtrade International, global Fairtrade sales reached **7.3 billion euros 2015**.
- › About **90 percent of the sales of organic and Fairtrade products are in Europe and North America**. North America is the largest organic market, with over 50 percent of the global organic market, while Europe represents almost 80 percent of Fairtrade retail sales.
- › The variety of Fairtrade products is smaller than that of organic products. Currently, consumers can find almost all food products in organic quality, while the scope of Fairtrade products is smaller.
- › When considering processed foods, another big difference emerges between organic and Fairtrade products. For a processed product to be labelled as organic, at least 95 percent of the ingredients of the final product need to be from organic-certified raw materials (IFOAM – Organics International 2014). In comparison, for a Fairtrade composite food product to carry the Fairtrade label, the product needs to have at least 50 percent of its ingredients Fairtrade-certified (Fairtrade International 2003).

Fairtrade and Organic: The largest markets for organic and Fairtrade products 2015

The ten countries with the largest markets for organic products 2015

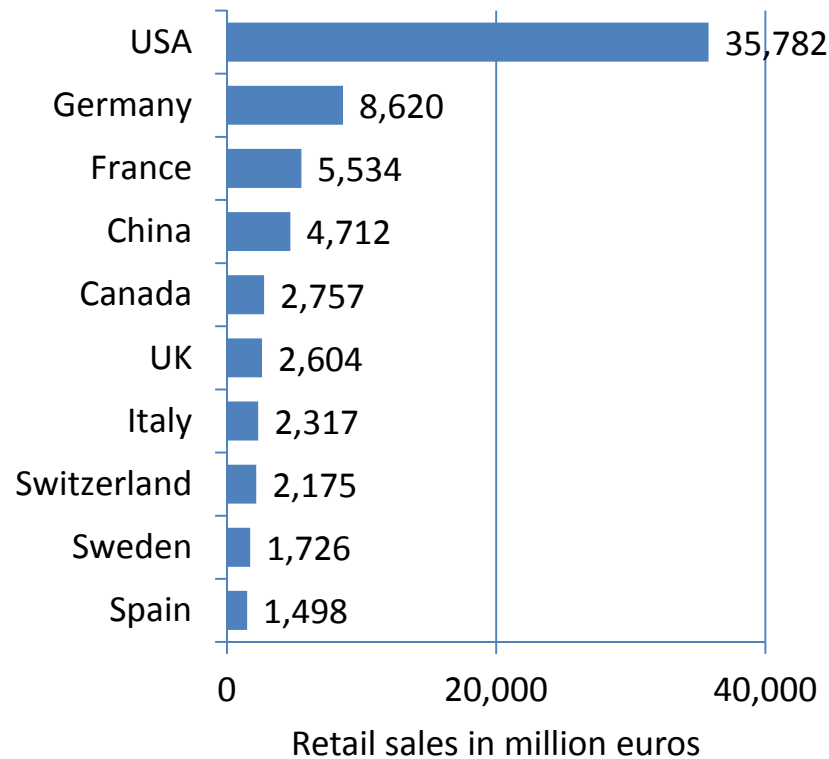
Source: FiBL-AMI survey 2017 and Fairtrade annual report 2015-2016



Fairtrade and Organic: The largest markets for organic and Fairtrade products 2015

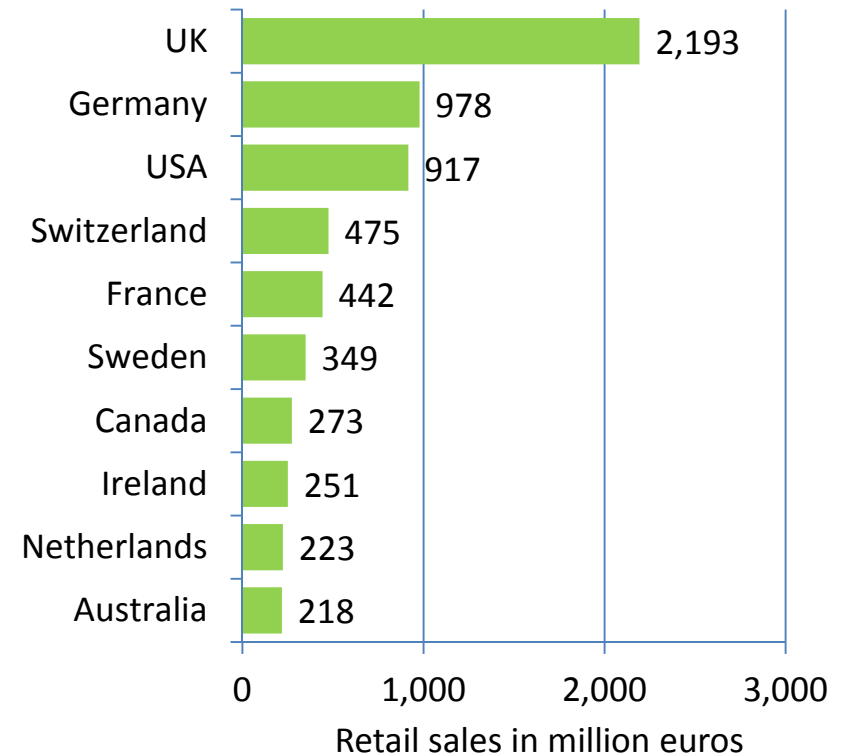
Organic: The ten countries with the largest markets for organic food 2015

Source: FiBL-AMI survey 2017



Fairtrade: Top 10 countries with the largest markets for Fairtrade food 2015

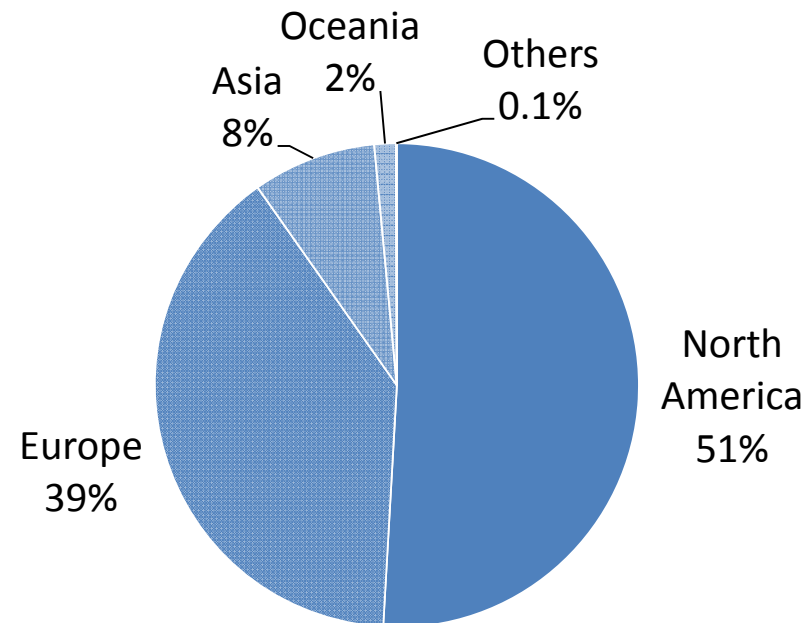
Source: Fairtrade International 2016



Fairtrade and Organic: Organic and Fairtrade markets distribution by region 2015

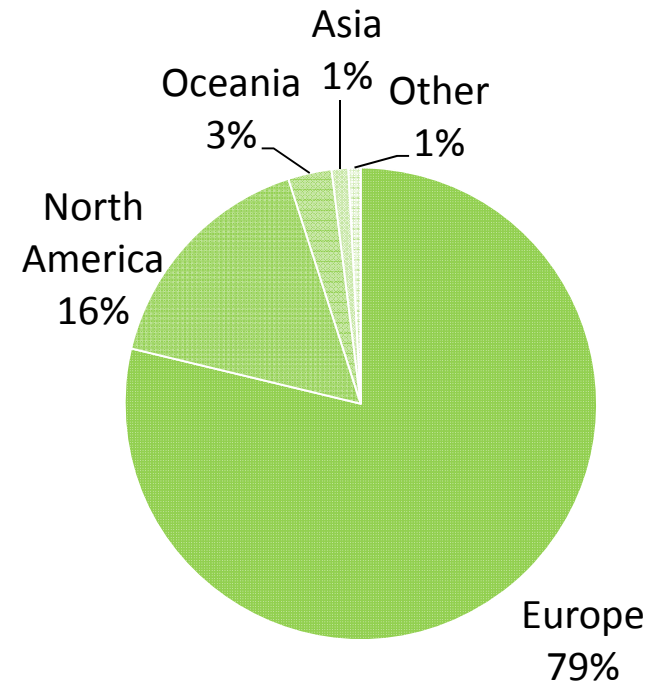
Organic: Distribution of retail sales value by region 2015

Source: FiBL-AMI survey 2017, based on retail sales with organic food



Fairtrade: Distribution of retail sales value by region 2015

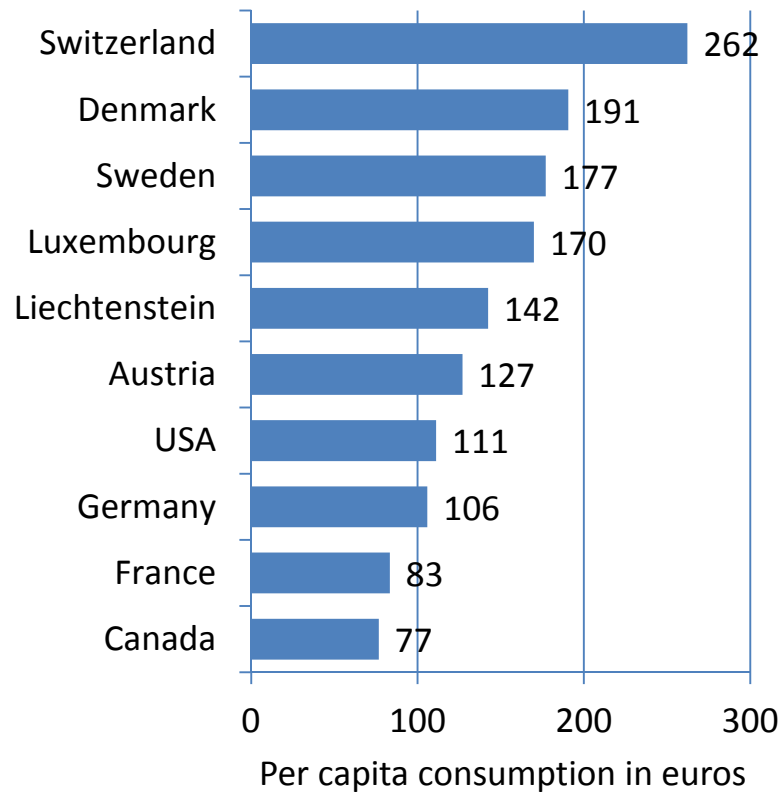
Source: Fairtrade International 2016



Fairtrade and Organic: The highest per capita consumption of organic and Fairtrade products 2015

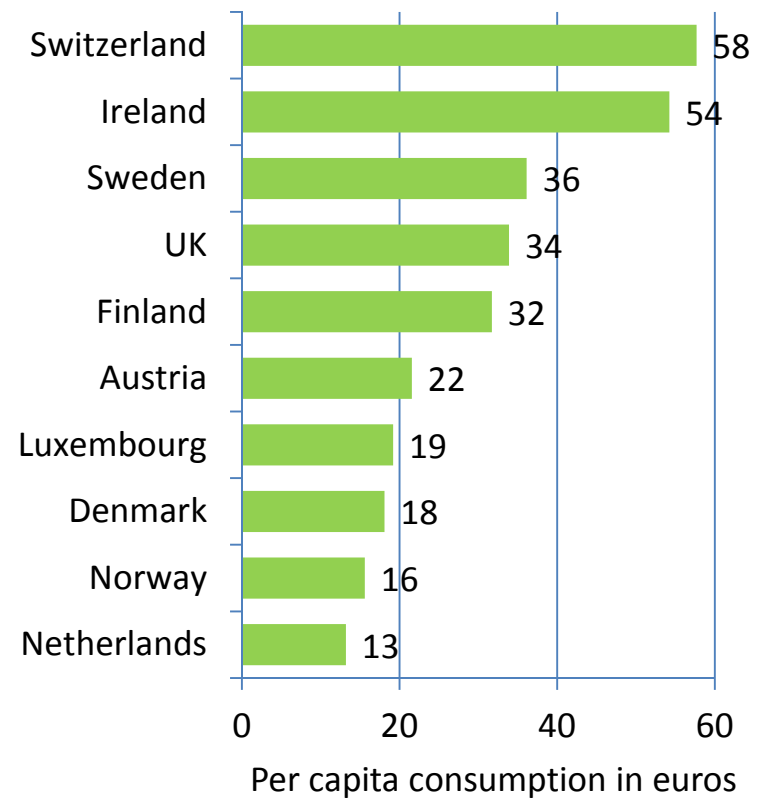
Organic: The ten countries with the highest per capita consumption 2015

Source: FiBL-AMI survey 2017



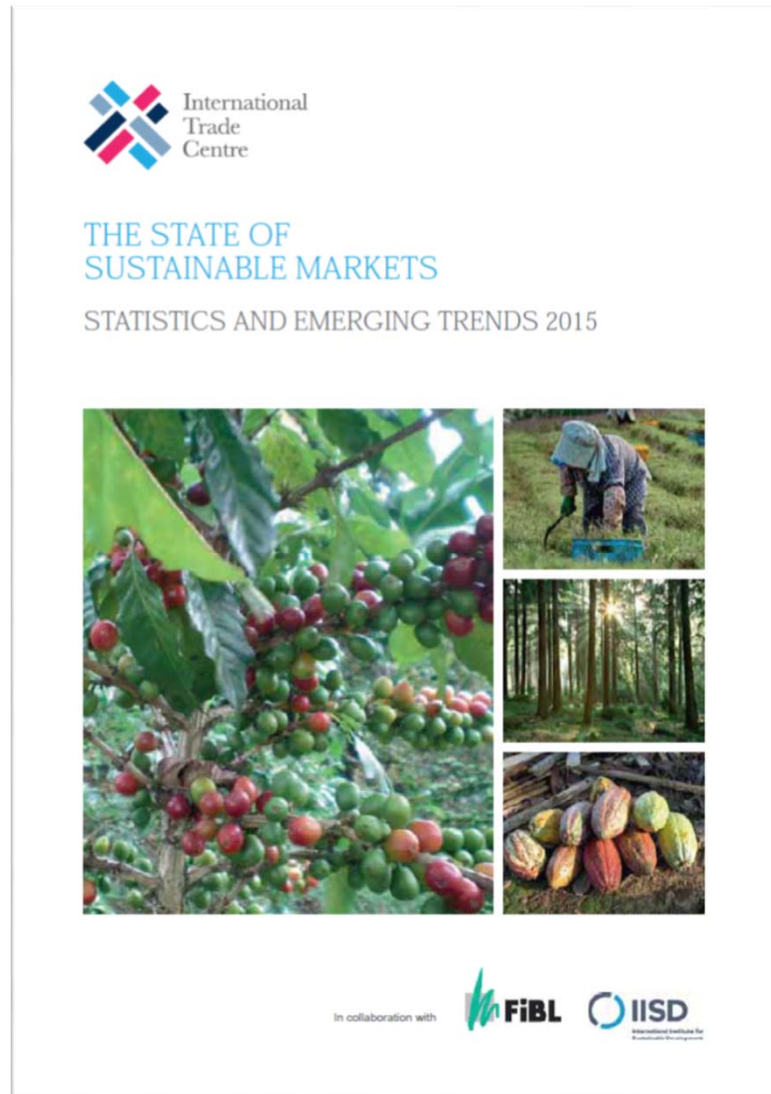
Fairtrade: The ten countries with the highest per capita consumption 2015

Source: Fairtrade International 2016



The State of Sustainable Markets

Statistics and Emerging Trends 2015



› Julia Lernoud, Jason Potts, Gregory Sampson, Vivek Voora, Helga Willer and Joseph Wozniak (2015): The State of Sustainable Markets – Statistics and Emerging Trends 2015. ITC, Geneva.

› <http://www.intracen.org/publication/The-State-of-Sustainable-Markets/>

› **The 2017 edition of “The State of Sustainable Markets” will be launched at the 2017 ISEAL Conference, Zurich, June 2017**

Conclusions

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