



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

**Julia Lernoud and Helga Willer**

Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, February 2016



# Partners

- › **Research Institute of Organic Agriculture (FiBL)**



- › **International Trade Centre (ITC)**

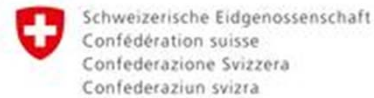


- › **International Institute for Sustainable Development**



# Supporter

- › **The Swiss State Secretariat for Economic Affairs SECO**



Swiss Confederation

Federal Department of Economic Affairs,  
Education and Research EAER  
State Secretariat for Economic Affairs SECO



# The State of Sustainable Markets

## Statistics and Emerging Trends 2015



### THE STATE OF SUSTAINABLE MARKETS

STATISTICS AND EMERGING TRENDS 2015



In collaboration with



- › 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/>

# 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

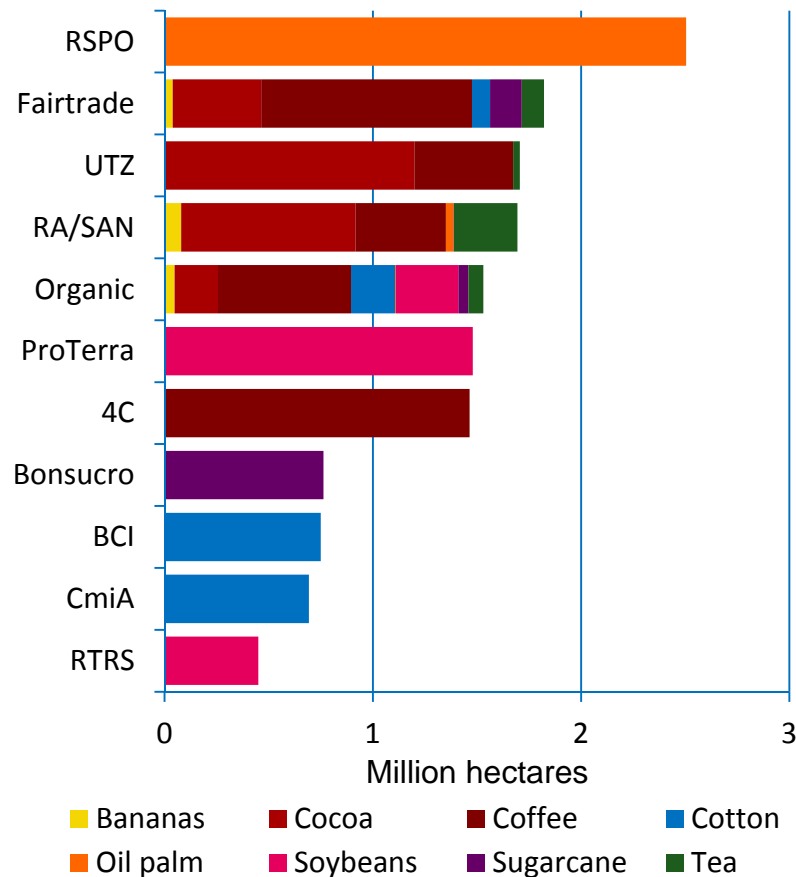
## › Data providers and data sources

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

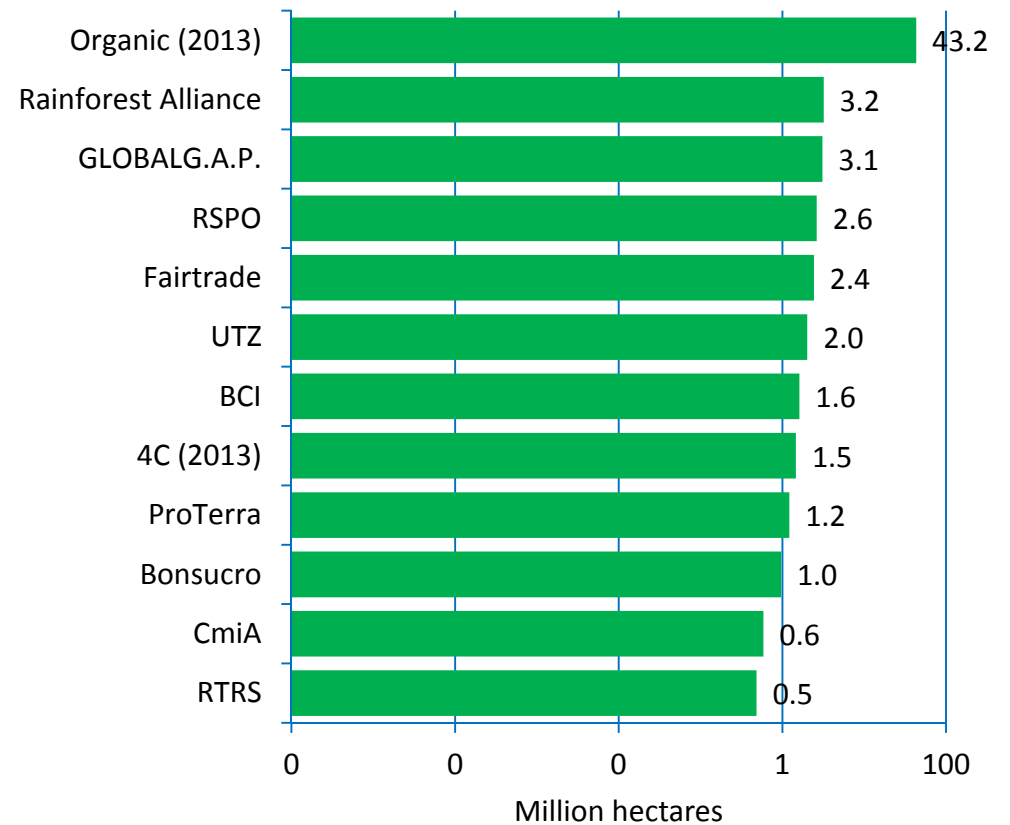
# Voluntary Sustainability Standards (VSS) area worldwide and selected commodities

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

## Total harvested area certified for selected crops per VSS 2014



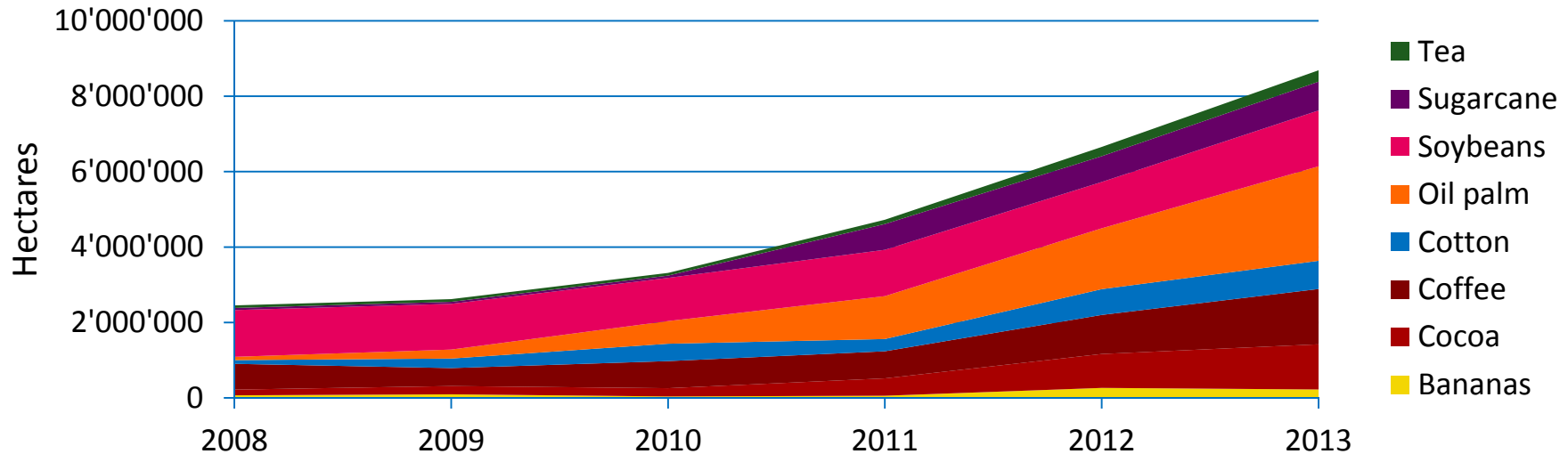
## Total certified area per VSS 2014



# 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

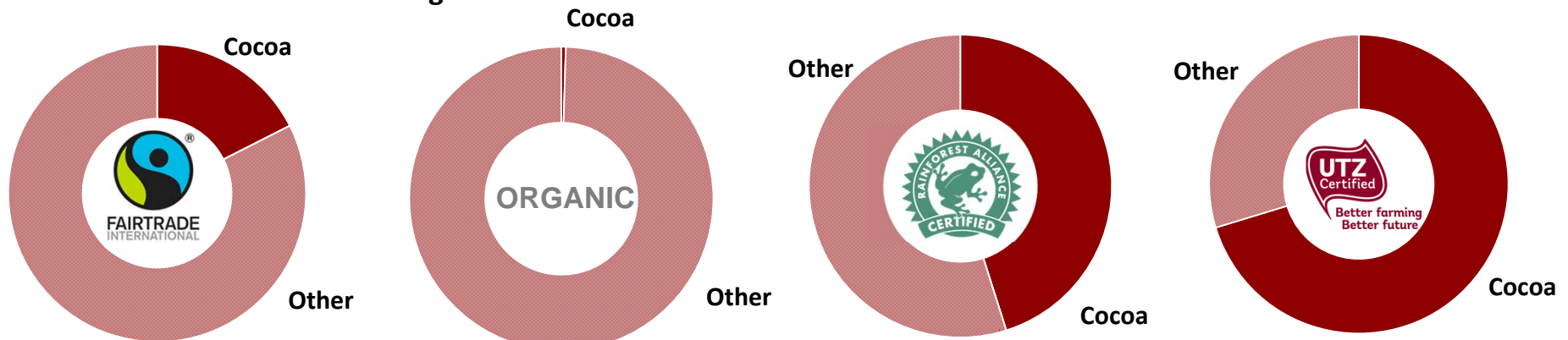
Source: Fairtrade International 2015; FiBL survey 2015 (data 2013); Rainforest Alliance/SAN 2015; UTZ 2015

Fairtrade International

Organic

Rainforest Alliance

UTZ Certified

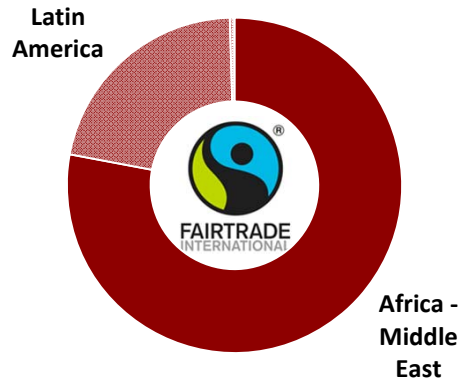




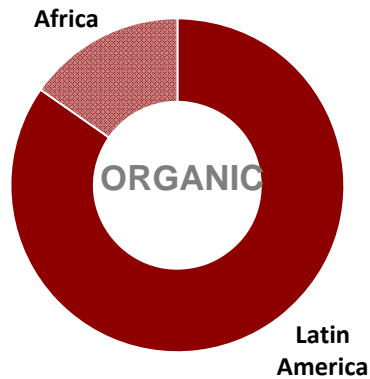
# Distribution of the cocoa area by region 2014

Source: Fairtrade International 2015; FiBL survey 2015 (data 2013); Rainforest Alliance/SAN 2015; UTZ Certified 2015

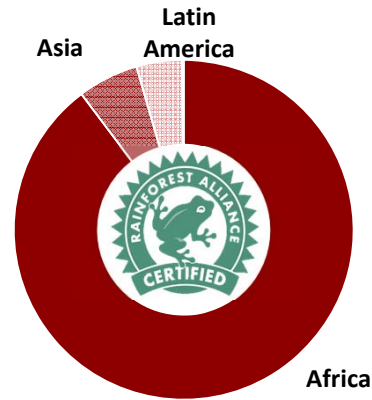
## Fairtrade International



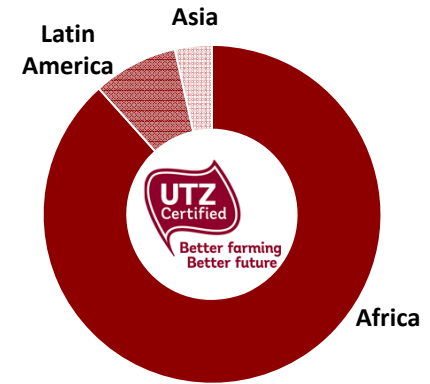
## Organic



## Rainforest Alliance



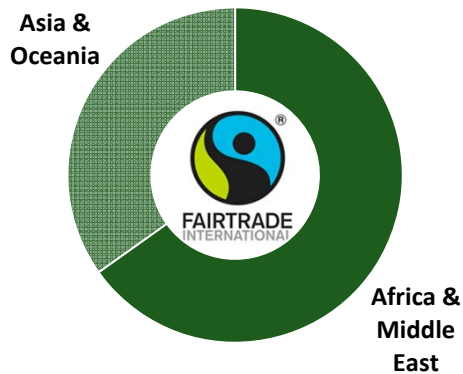
## UTZ Certified



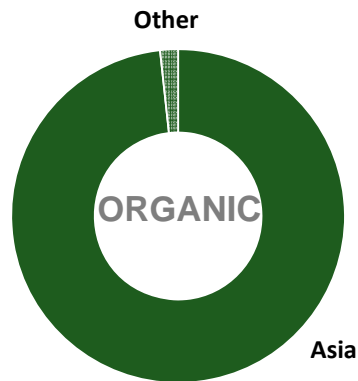
# Distribution of the tea area by region 2014

Source: Fairtrade International 2015; FiBL survey 2015 (data 2013); Rainforest Alliance/SAN 2015; UTZ Certified 2015

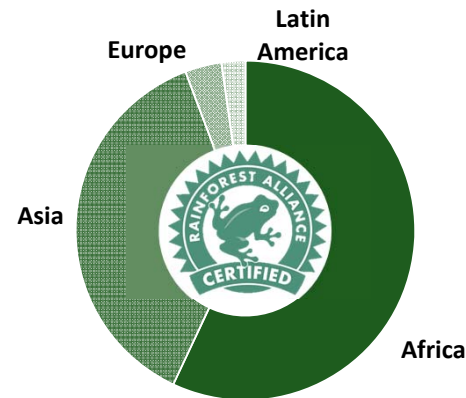
## Fairtrade International



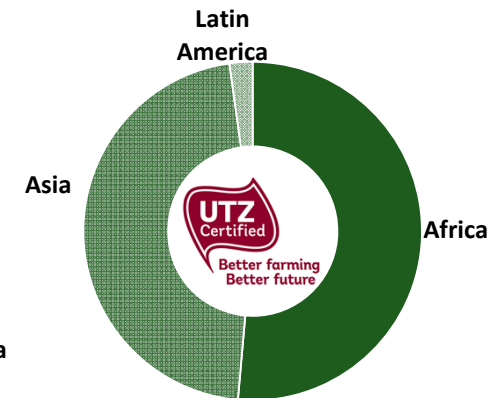
## Organic



## Rainforest Alliance



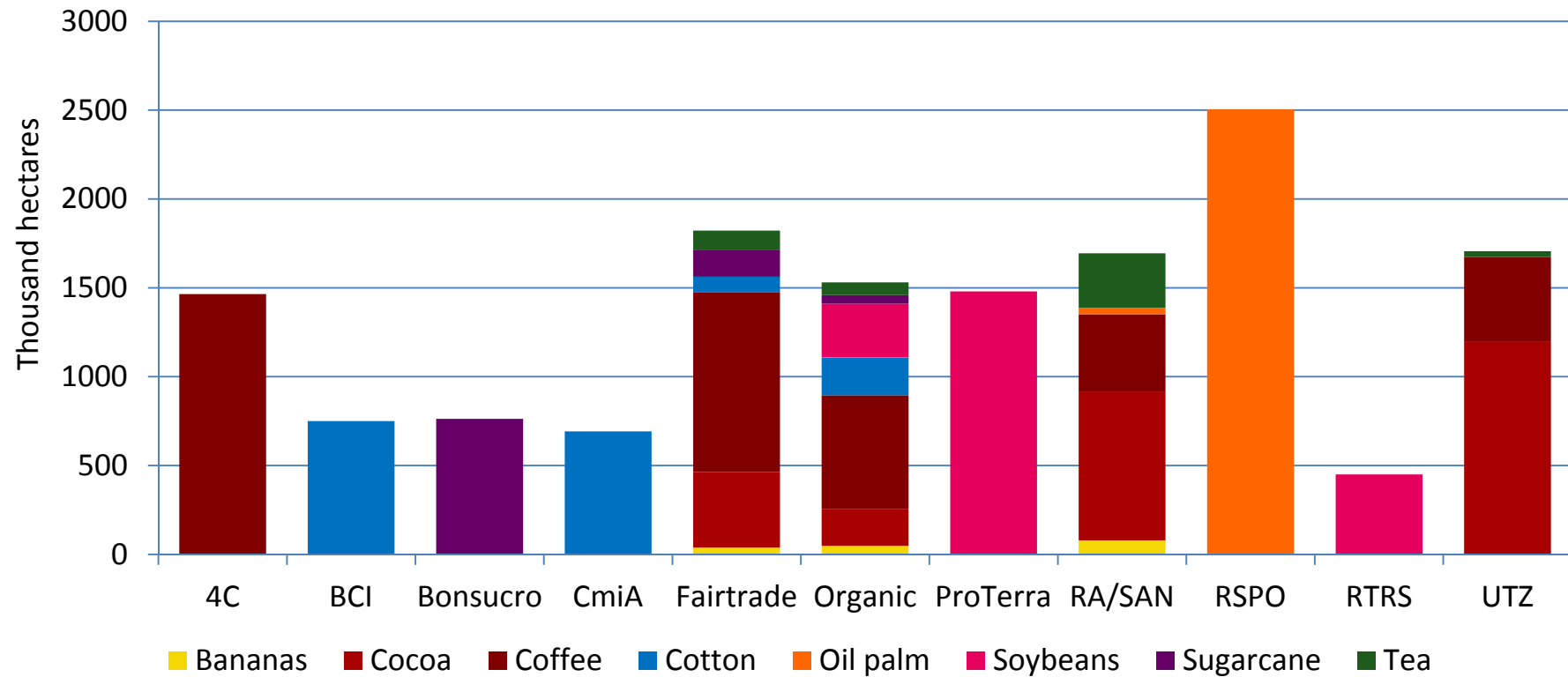
## UTZ Certified



# Area covered by each VSS

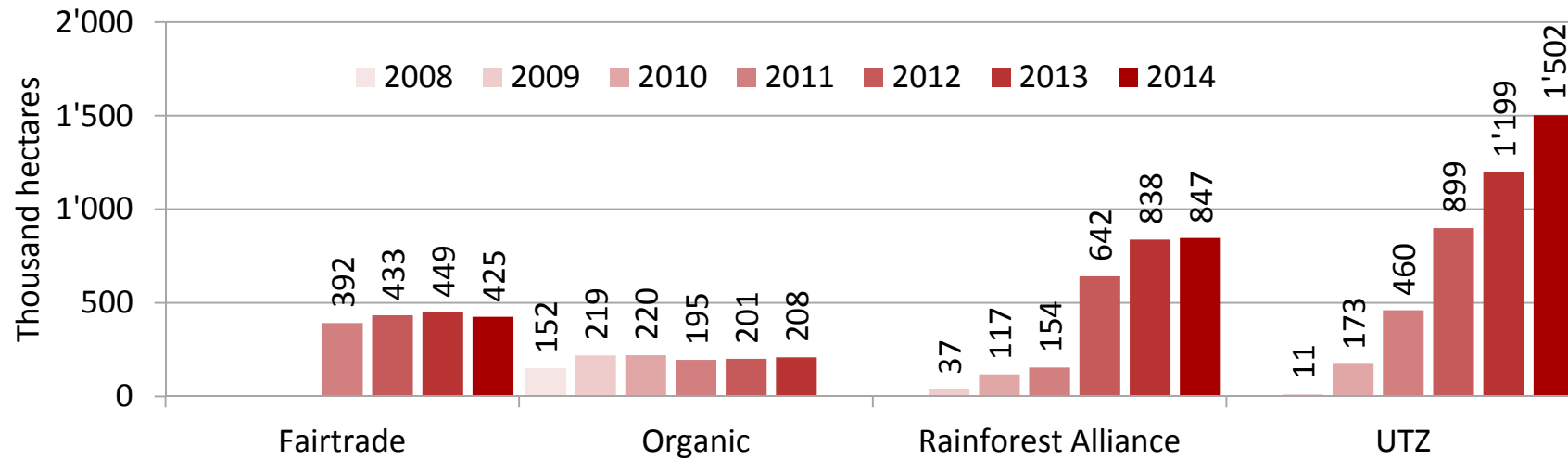
## Total harvested area certified by crop for selected crops and selected VSS 2013

Source: FiBL-IISD-ITC survey 2015: 4C Association; Better Cotton Initiative; Bonsucro; Cotton Made in Africa; Fairtrade International; Global Gap; FiBL-IFOAM survey; ProTerra



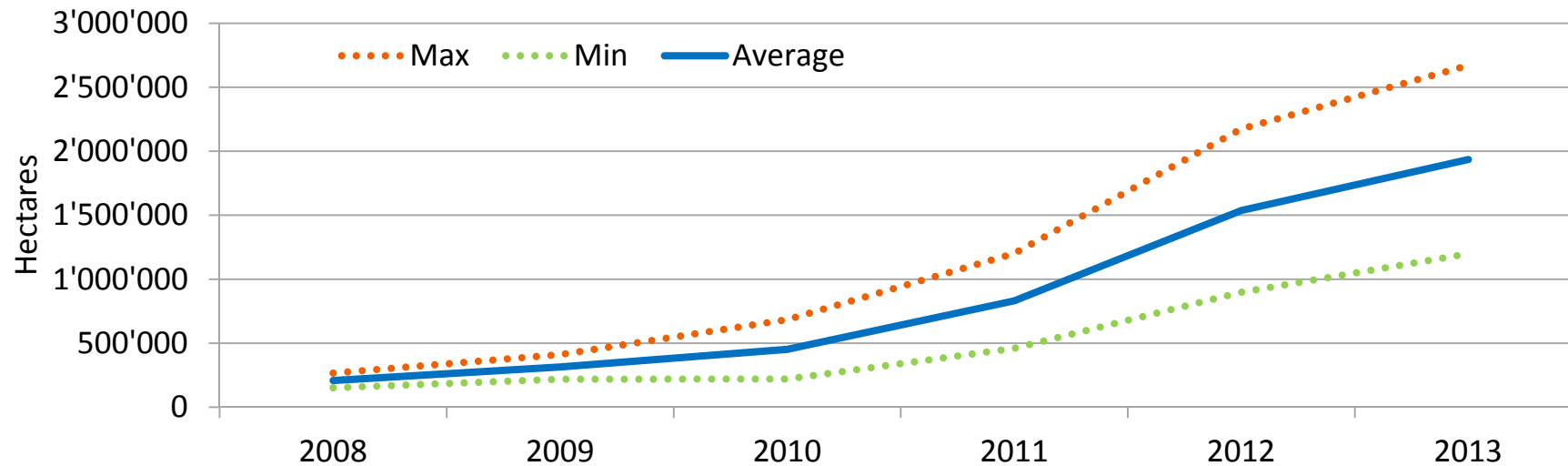
## Cocoa: Development of the area by VSS 2008-2014

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



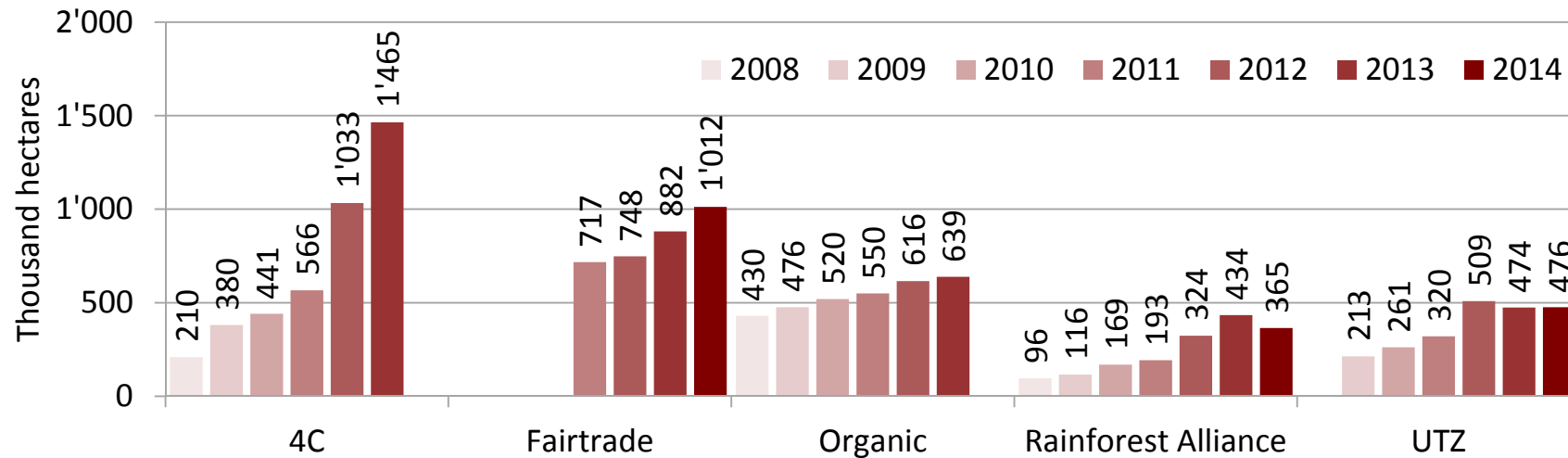
## Cocoa: Range of cocoa area (minimum/maximum/average) 2008-2013

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



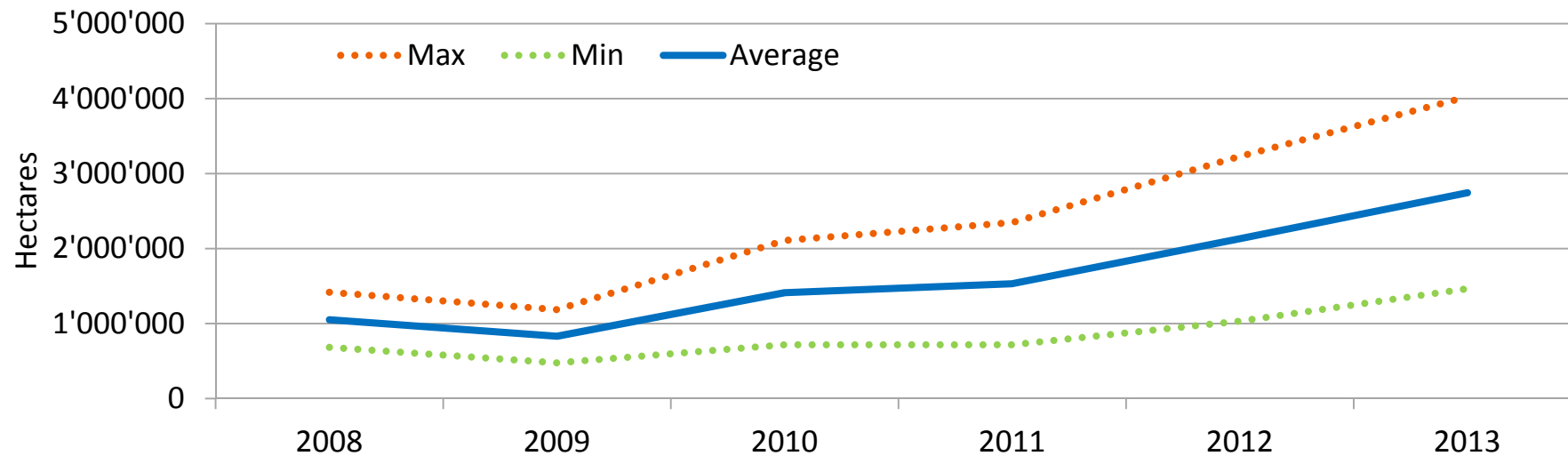
## Coffee: Development of the area by VSS 2008-2014

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

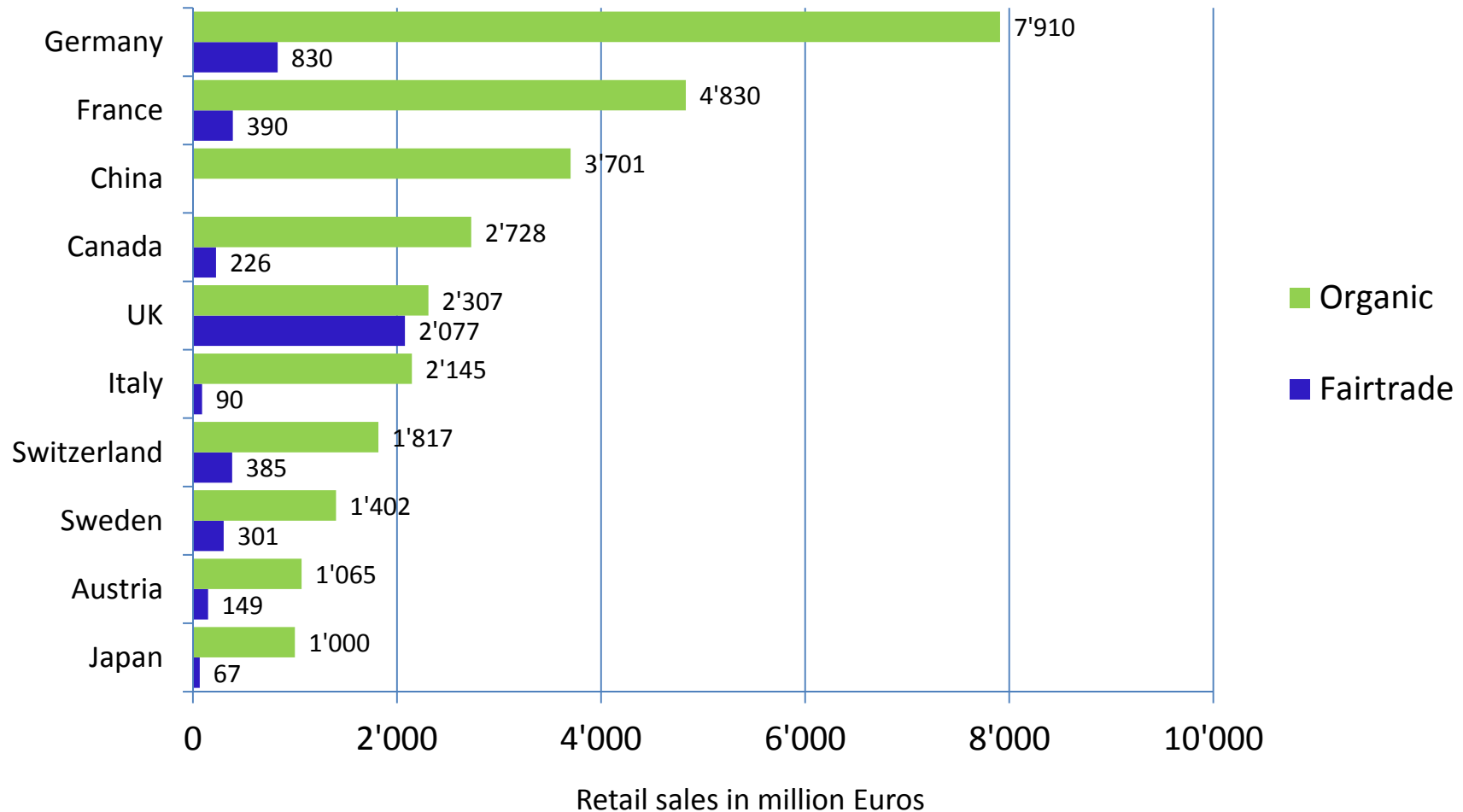
Source: 4C Association 2015; Fairtrade International 2015; FiBL survey 2015; Rainforest Alliance/SAN 2015; UTZ Certified 2015



# 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)



# 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