



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

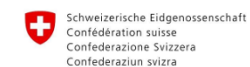
Julia Lernoud and Helga Willer

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Nuremberg, Germany

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Funded by



Schweizerische Eidgenossenschaft
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Swiss Confederation

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

Partners

- Research Institute of Organic Agriculture (FiBL)



- International Trade Centre (ITC)



- International Institute for Sustainable Development



Supporter

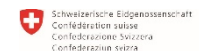
- The Swiss State Secretariat for Economic Affairs SECO



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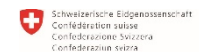


Swiss Confederation

Federal Department of Economic Affairs (DDA)
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



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Selected commodities

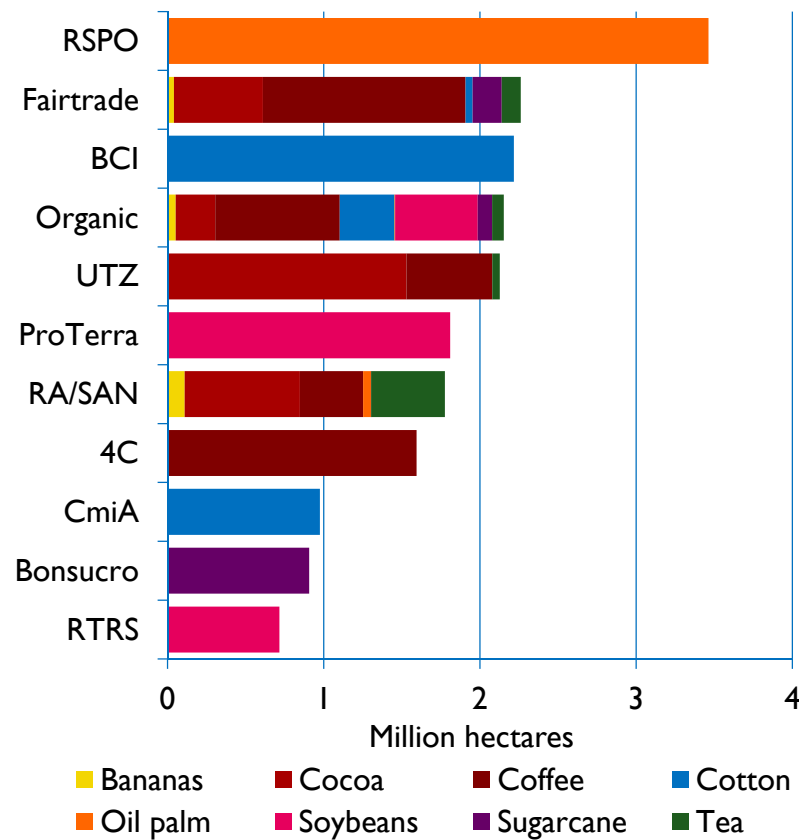
- Bananas
- Cocoa
- Coffee
- Cotton
- Oil palm
- Soybeans
- Sugarcane
- Tea
- Forestry



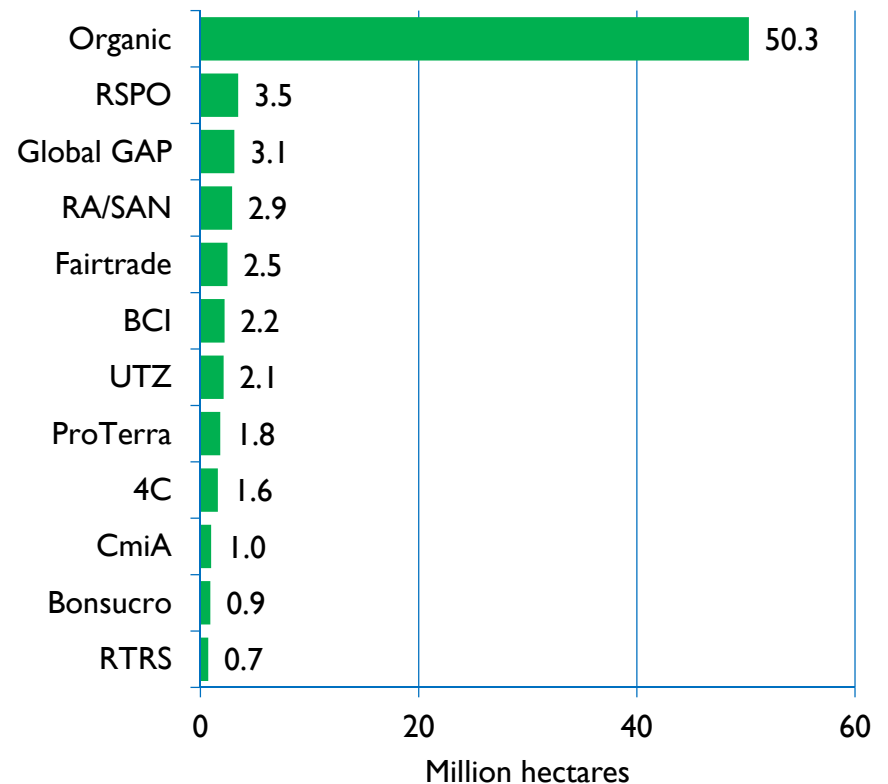
Voluntary Sustainability Standards (VSS) area worldwide and selected commodities

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

Total harvested area certified for selected crops per VSS 2015



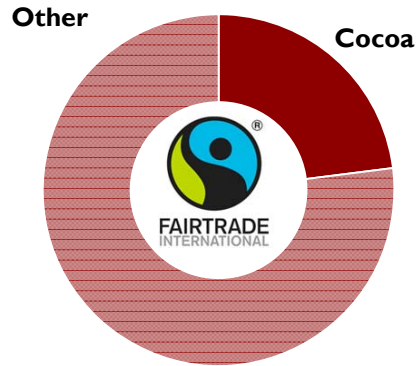
Total certified area per VSS 2015



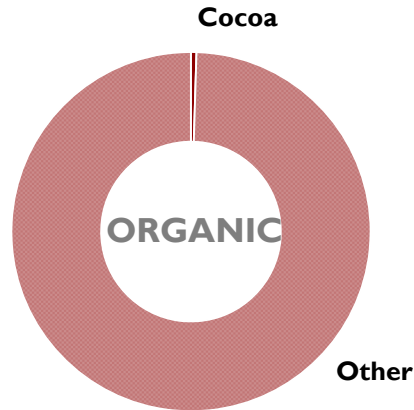
Cocoa area share of total VSS area 2015

Source: FiBL-IISD-ITC survey 2017; Fairtrade International 2017; FiBL survey 2017; Rainforest Alliance/SAN 2016; UTZ 2016

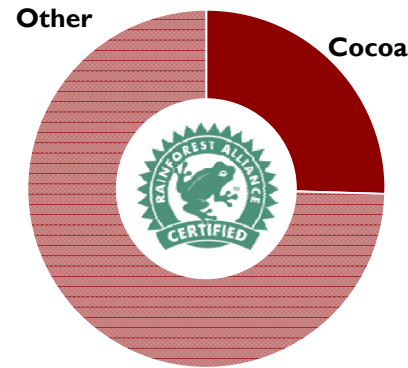
Fairtrade International



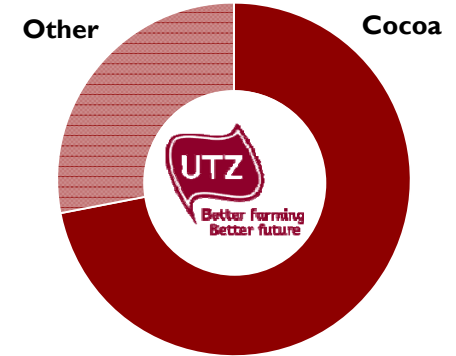
Organic



Rainforest Alliance



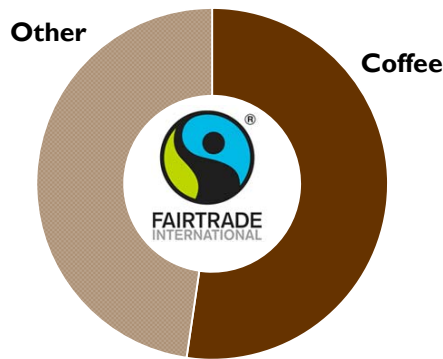
UTZ



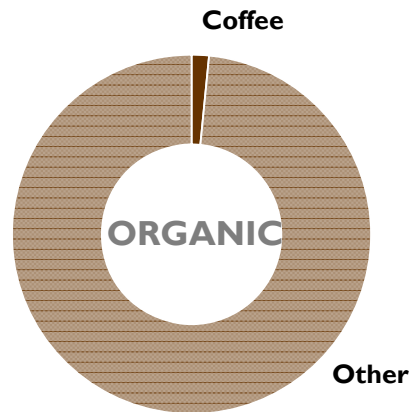
Coffee area share of total VSS area 2015

Source: FiBL-IISD-ITC survey 2017; Fairtrade International 2017; FiBL survey 2017; Rainforest Alliance/SAN 2016; UTZ 2016

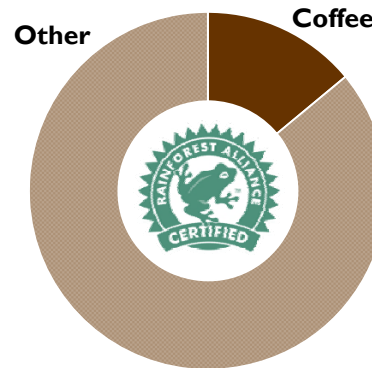
Fairtrade International



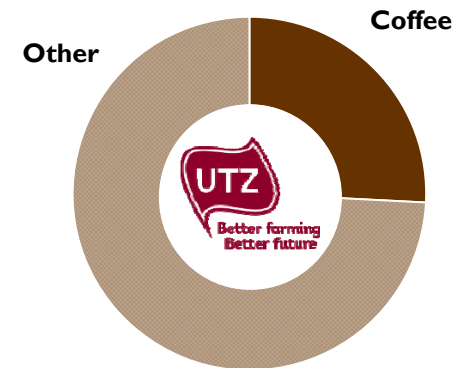
Organic



Rainforest Alliance



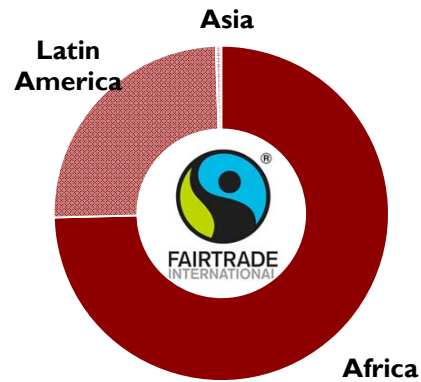
UTZ



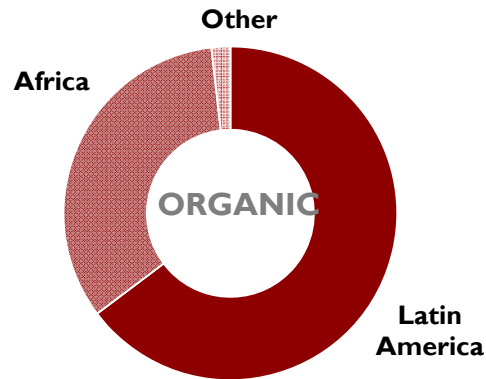
Distribution of the cocoa area by region 2015

Source: Fairtrade International 2017; FiBL survey 2017; Rainforest Alliance/SAN 2016; UTZ 2016

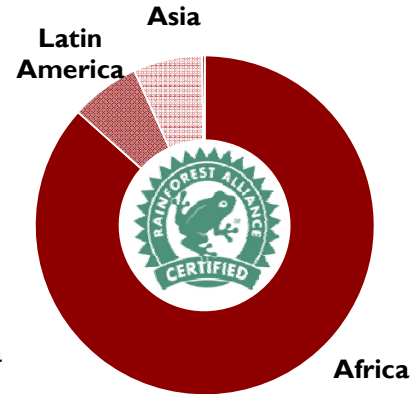
Fairtrade International



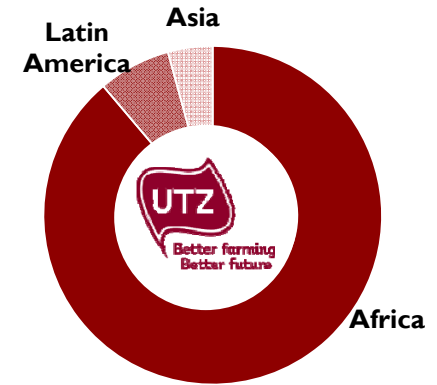
Organic



Rainforest Alliance/SAN



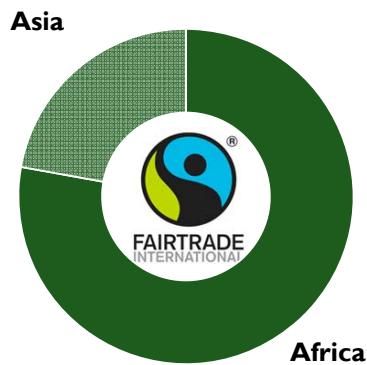
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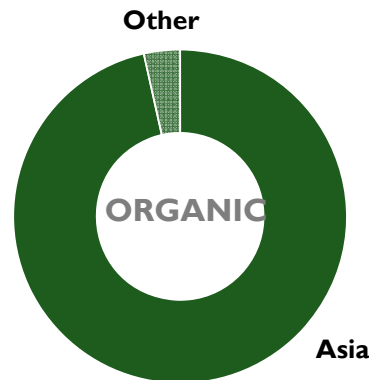
Distribution of the tea area by region 2015

Source: Fairtrade International 2017; FiBL survey 2017; Rainforest Alliance/SAN 2016; UTZ 2016

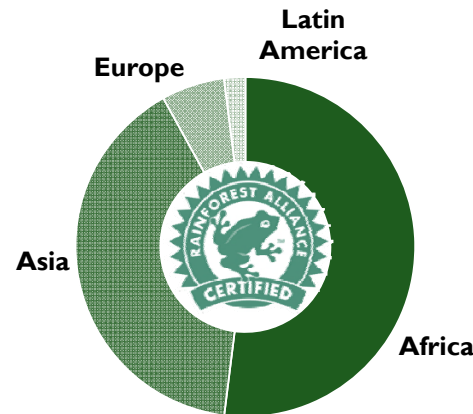
Fairtrade International



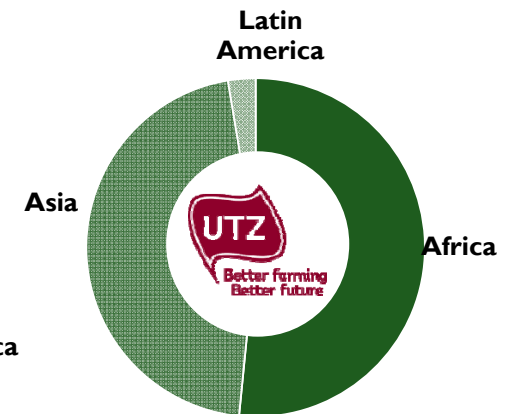
Organic



Rainforest Alliance/SAN

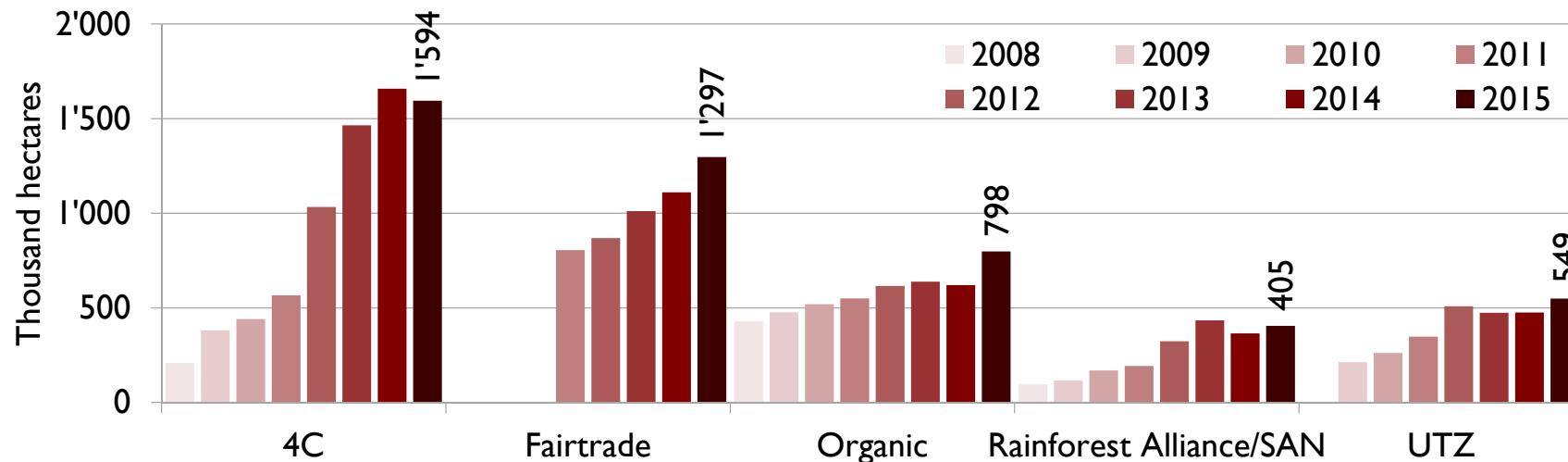


UTZ



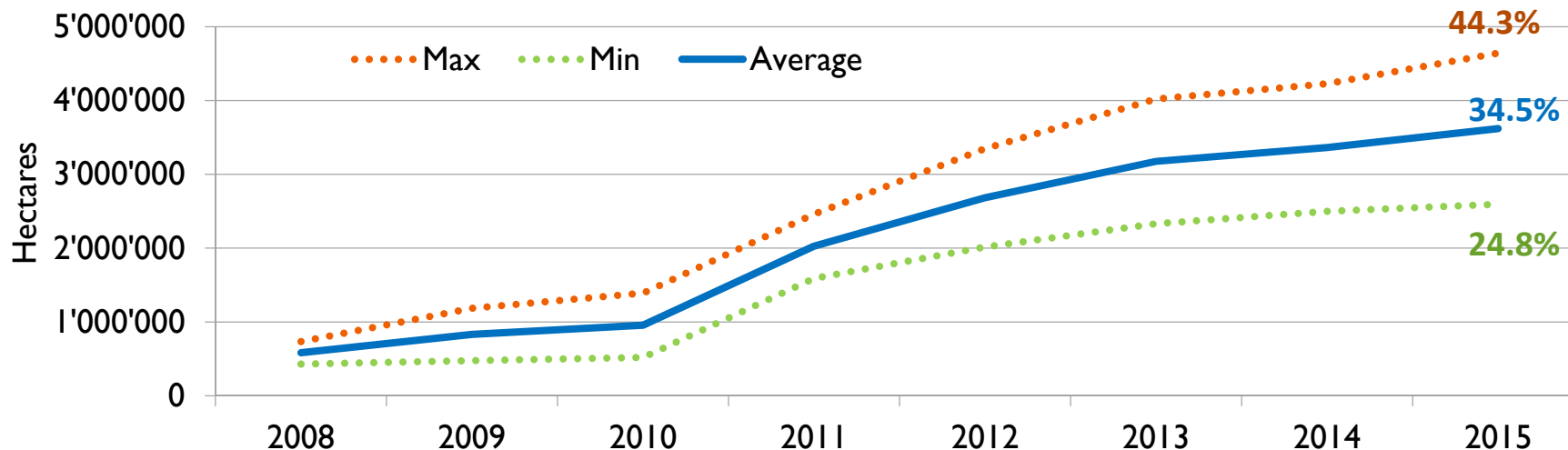
Coffee: Development of the area by VSS 2008-2015

Source: 4C 2016; Fairtrade International 2017; FiBL survey 2017; Rainforest Alliance/SAN 2016; UTZ 2016



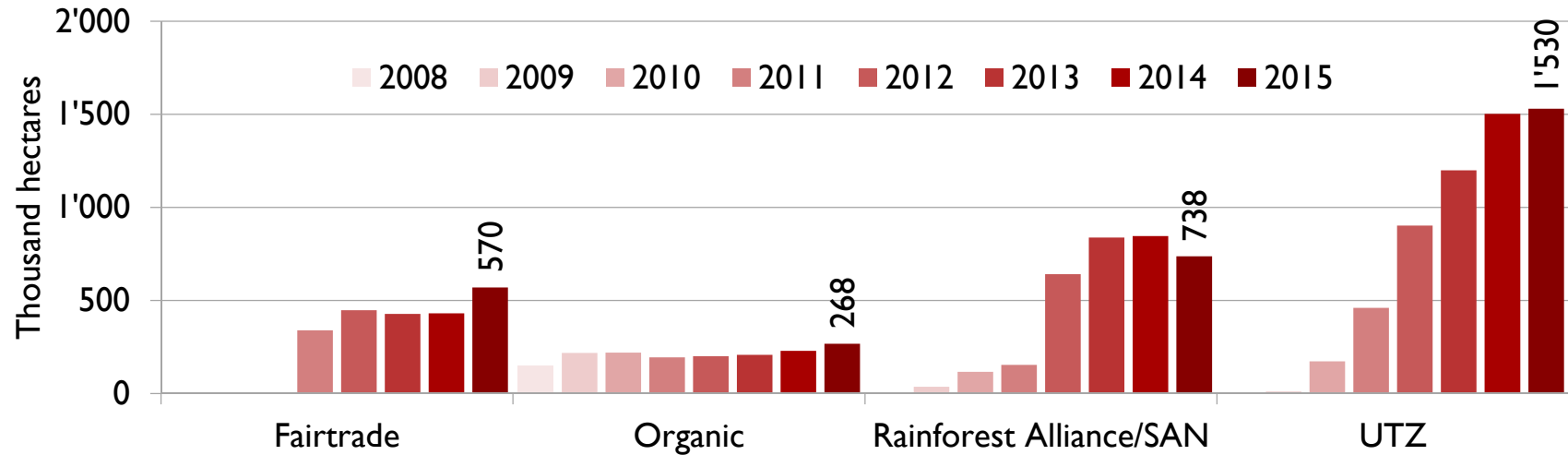
Coffee: Range of coffee area (minimum/maximum/average) 2008-2015

Source: FiBL-IISD-ITC survey 2017



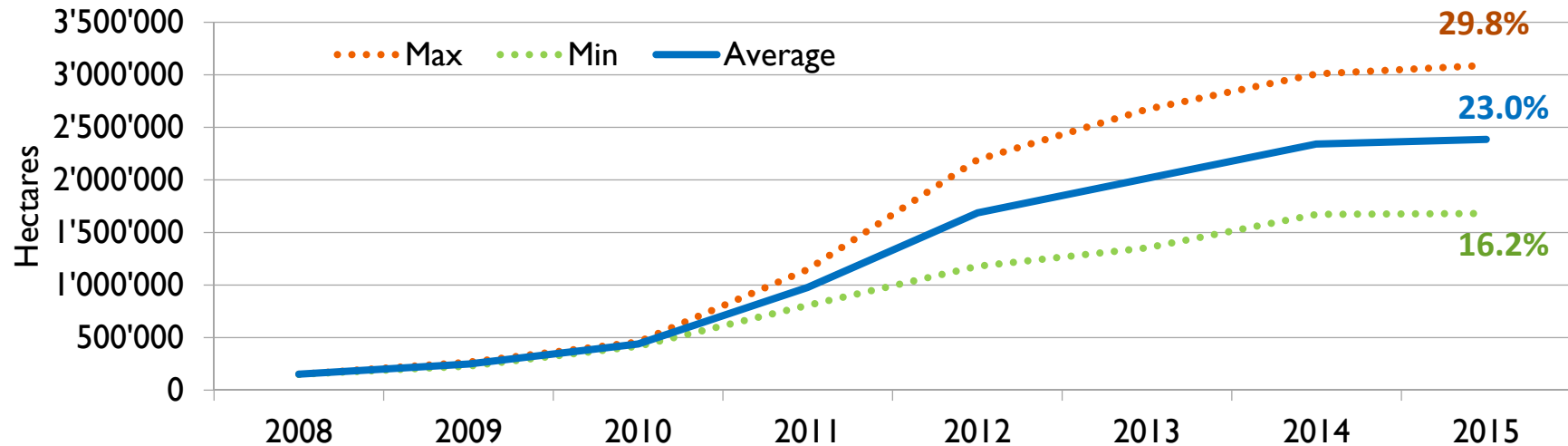
Cocoa: Development of the area by VSS 2008-2015

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



- Julia Lernoud, Jason Potts, Gregory Sampson, Salvador Garibay, Matthew Lynch, Vivek Voora, Helga Willer and Joseph Wozniak (2017), The State of Sustainable Markets – Statistics and Emerging Trends 2017. ITC, Geneva.
- <http://www.intracen.org/publication/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 Paulo, 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