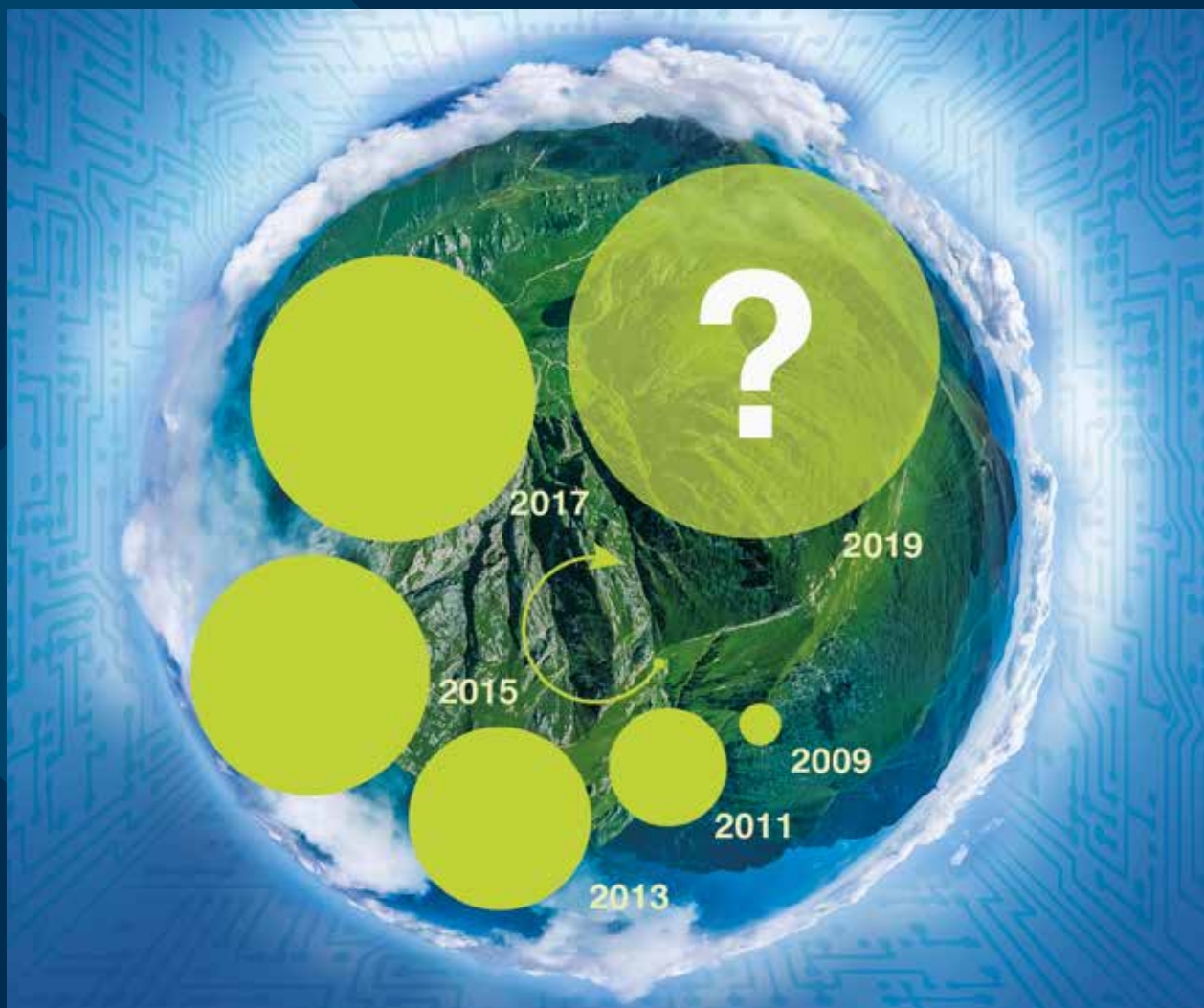


# The State of Sustainable Markets 2019

STATISTICS AND EMERGING TRENDS



### **How much has agricultural land certified as sustainable grown since 2011?**

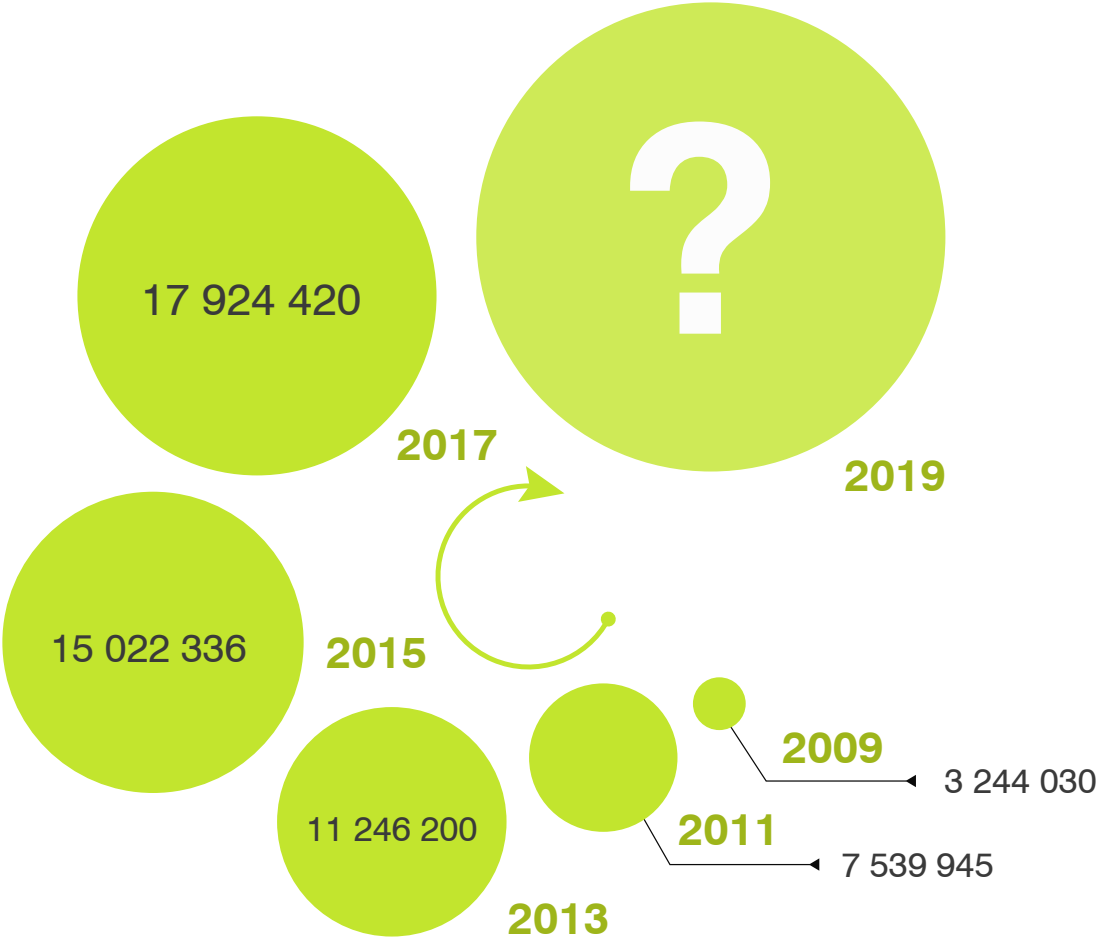
This is the world's most comprehensive report on sustainable markets, with data from 14 major sustainability standards for eight agricultural products, plus forestry.

This chart gives a snapshot of sustainable land area (in hectares) certified by at least one standard from 2011 to 2017. It covers eight agricultural products, highlighted in the report.

**Note:** This is a minimum. The actual land area is larger, as many producers have multiple certifications.

# THE STATE OF SUSTAINABLE MARKETS 2019

## STATISTICS AND EMERGING TRENDS



## **Sustainability standards continue their growth across the world.**

This fourth global report provides new insights into the evolution of certified agriculture and forestry. ITC has teamed up once again with the Research Institute of Organic Agriculture and the International Institute for Sustainable Development to provide data about 14 major sustainability standards for bananas, cocoa, coffee, cotton, oil palm, soybeans, sugarcane, tea and forestry products. This report helps shape decisions of policymakers, producers and businesses, working to address systemic labour and environmental challenges through certified sustainable production.

**Title:** The State of Sustainable Markets 2019: Statistics and Emerging Trends

**Publisher:** International Trade Centre (ITC), International Institute for Sustainable (IISD), Research Institute of Organic Agriculture (FiBL)

**Publication date and place:** October 2019, Geneva

**Page count:** 72

**Language:** English

**ISBN:** 978-92-1-103675-6

**eISBN:** 978-92-1-004614-5

**Print ISSN:** 2617-5452

**eISSN:** 2617-5460

**United Nations Sales Number:** E.19.III.T.5

**ITC Document Number:** P115.E/DEI/SIVC/19-X

**Citation:** *Helga Willer, Gregory Sampson, Vivek Voora, Duc Dang, Julia Lernoud (2019), The State of Sustainable Markets 2019 – Statistics and Emerging Trends. ITC, Geneva.*

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For more information on sustainability standards, see [www.sustainabilitymap.org/standards](http://www.sustainabilitymap.org/standards).

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## FOREWORD

To deliver on the United Nations 2030 Agenda and to protect our planet over the long term, our collective challenge must be to consume, produce and trade sustainably.

Unsustainable consumption and production depletes natural resources and can exacerbate inequalities between and within societies. United Nations Sustainable Development Goal 12 (SDG 12), which focuses on responsible consumption and production, highlights the central role that businesses, governments and consumers play in driving the changes needed in how global value chains are organized and how final products and services are consumed.

Ensuring that environmentally sustainable methods are used in production processes should be a top priority. Not only because it ensures cleaner and greener value chains, but it also helps in the fight against climate change. Data drive decisions. And the data show that our planet is under strain. Rainforests are burning, glaciers are melting and increasingly destructive hurricanes are rolling back decades of socioeconomic gains in small island states.

In tandem, we must ensure that decent working conditions are a core element of production processes, regardless of sector or location. Consumer behaviour can encourage environmentally and socially sustainable production as well as proper labour conditions. People want to know who has produced the food that eventually reaches their table, as well as how and where it was produced. Increasingly, they are protesting with their purchasing power.


In part, SDG 12 is about scrutinizing labour and environmental conditions in global value chains and steering current business habits towards more ethical and responsible sourcing strategies. But it is also about informing consumers how their purchasing decisions affect micro, small and medium-sized businesses in developing countries. ITC's role is to strengthen sustainable production capacities in developing countries, promote sustainable consumption and support actors who practice what we call 'good trade'.

This year's State of Sustainable Markets edition shows continued growth in sustainably certified agricultural and forestry commodities. It shows expanding coverage of agricultural land and dominance in some sectors of single-sector standards.

For the first time, we have made this wealth of information and analytics available online in an interactive format. We have also added a new feature that enables readers to search by country for a specific certified area and for a product or particular sustainability standard.

The findings in this year's report corroborate the results from ITC's latest research initiative focusing on a cross-sectoral survey on the demand for sustainable goods in the European Union. Sustainable product sales in the EU are rising swiftly, and European retailers are shifting towards sourcing and selling goods that are socially and environmentally sound.

ITC's main takeaway from this research – both the supply-side data found in this study and the results from our demand-side EU survey – is that efforts to achieve the SDGs require a holistic value chain approach. This means engaging local stakeholders and adopting socially and environmentally sustainable production practices – to make 'good trade' the new normal.



Arancha González  
Executive Director  
International Trade Centre

## ACKNOWLEDGEMENTS

The Research Institute of Organic Agriculture (FiBL), the International Institute for Sustainable Development (IISD) and the International Trade Centre (ITC) are very grateful to the Swiss State Secretariat for Economic Affairs (SECO) for its financial support of the global data collection on voluntary sustainability standards and the production of this publication. Further acknowledgements are due to all the standard-setting organizations that collaborated on the report: 4C – Common Code for the Coffee Community, Better Cotton Initiative (BCI), Bonsucro, Cotton made in Africa (CmiA), GLOBALG.A.P., Fairtrade International, Forest Stewardship Council (FSC), IFOAM – Organics International, the Programme for the Endorsement of Forest Certification (PEFC), ProTerra Foundation, Rainforest Alliance, the Roundtable on Sustainable Palm Oil (RSPO), the Round Table on Responsible Soy (RTRS) and UTZ.<sup>1</sup>

The publishers also wish to thank the following individuals, without whose contribution this report would not have been possible:

**Oshin Abrami**, GLOBALG.A.P., Cologne; **Gustavo Bacchi**, 4C Services, Cologne; **Thorsten Arndt**, PEFC International, Geneva; **Shannon Avison**, BCI, Geneva; **Ana Patricia Batalhone**, ITC, Geneva; **Gerlind Baez**, CmiA, Hamburg; **Christina Ben Bella**, CmiA, Hamburg; **Emese Brosz**, ProTerra Foundation, Bilthoven; **Thomas Bernet**, FiBL, Frick; **Daniel Castro**, Fairtrade International, Bonn; **Alice Correa**, ProTerra Foundation, Bilthoven; **Maira Devisscher**, International Social and Environmental Accreditation and Labelling (ISEAL) Alliance, London; **Lisa Emberson**, Textile Exchange, London; **Christina Endemann**, FSC International, Bonn; **Augusto Freire**, ProTerra Foundation, Bilthoven; **Salvador Garibay**, FiBL, Frick; **Phan Ha**, Rainforest Alliance, Amsterdam; **Marion Karmann**, FSC International, Bonn; **Daniel Kazimierski**, RTRS, Buenos Aires; **Laura Kemper**, FiBL, Frick; **Kristin Komives**, ISEAL Alliance, London; **Karin Kreider**, ISEAL Alliance, London; **Cristina Larrea**, International Institute for Sustainable Development, Winnipeg; **Lee See Lung**, RSPO, Kuala Lumpur; **Marta Maireles**, ISEAL Alliance, London; **Louise Lutikholt**, IFOAM – Organics International, Bonn; **Claudia Meifert**, GLOBALG.A.P., Cologne; **Arisbe Mendoza**, Fairtrade International, Bonn; **Monika Messmer**, FiBL, Frick; **Kristian Moeller**, GLOBALG.A.P., Cologne; **Bernadette Oehen**, FiBL, Frick; **Soo Chin Oi**, RSPO, Kuala Lumpur; **Kendra Pasztor**, BCI, Geneva; **Alexandra Perschau**, CmiA, Hamburg; **Eleanor Radford**, ISEAL Alliance, London; **Veronica Rubio**, ProTerra Foundation, Bilthoven; **Aimee Russillo**, Liseed, Kentucky; **Bernhard Schlatter**, FiBL, Frick; **Monika Schneider**, FiBL, Frick; **Nina Schöttle**, CmiA, Hamburg; **Rafael Seixas**, Bonsucro, London; **Sonia Slavinski**, Bonsucro, London; **Alexia Stumpf**, ProTerra Foundation, Bilthoven; **Evonne Tan**, Textile Exchange, **Petaling Jaya**; Liesl Truscott, Textile Exchange, Bath; **Nahuel Tuñon**, Bonsucro, London; **Rob Ukkerman**, FSC International, Bonn; **Andrea Valenzuela**, Rainforest Alliance, San José; **Enrique Uribe**, GLOBALG.A.P., Cologne; **Nicolas Viart**, Bonsucro, London; **Laura Villegas**, RTRS, Buenos Aires; **Gerrit Walter**, Fairtrade International, Bonn.

Jennifer Freedman, the editor of this report; Natalie Domeisen and Evelyn Seltier, ITC, for quality and production management; Kristina Golubic, ITC, for design; Serge Adeagbo and Franco Iacovino, ITC, for printing.

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1. Although UTZ merged with Rainforest Alliance in 2018, they are treated separately in the report as the data presented are from 2017.

## PROJECT PARTNERS

The **International Trade Centre (ITC)**, founded in 1964, is the joint agency of the World Trade Organization and the United Nations. Its aim is for businesses in developing countries to become more competitive in global markets, to speed up economic development and to contribute to the achievement of the United Nations Sustainable Development Goals.

Trade for Sustainable Development is the partnership-based programme of ITC that helps businesses chart their paths to more sustainable trade. The programme offers access to wide-ranging information for trade-related sustainability initiatives and standards. Building on well-established online tools, such as Standards Map and SustainabilityXchange, ITC launched a new platform, the Sustainability Map, in September 2017. It provides new features, such as the Sustainability Network. The online platform enables users, regardless of their position in the value chain, to better understand the sustainability initiatives landscape and to connect with business partners.

The **Research Institute of Organic Agriculture (FiBL)**, founded in 1973, links interdisciplinary research to the rapid transfer of knowledge from research to agricultural practice, drawing on advisory work, training and conferences. FiBL has offices in Austria, France, Germany and Switzerland, as well as a representative office in Brussels. It also undertakes numerous projects and initiatives in Africa, Asia, Europe and Latin America.

FiBL has more than 15 years of experience in collecting and publishing data on organic agriculture. Since 2000, it has developed a network of some 200 experts from 180 countries, all of whom contribute to data collection. Every year, FiBL and IFOAM – Organics International jointly publish *The World of Organic Agriculture*, which documents recent developments in the field worldwide. The Swiss State Secretariat for Economic Affairs (SECO), in collaboration with ITC, has financially supported this global data collection since 2008. NürnbergMesse (organizer of the BIOFACH organic fair), the Coop Sustainability Fund and IFOAM – Organics International also provide support. FiBL has been active since 2014 in the collection of data on sustainability standards. For more information, see <https://statistics.fibl.org>.

FiBL works to encourage sustainable production in the food and agriculture sector, in part by contributing to the development of the guidelines for Sustainability Assessment of Food and Agriculture Systems (SAFA), published in 2013 by the Food and Agriculture Organization of the United Nations (FAO). Based on these guidelines, FiBL developed the Sustainability Monitoring and Assessment Routine (SMART), which is now widely used for transparent and comparable assessments of the sustainability performance of farms and the impacts of voluntary standards.

The **International Institute for Sustainable Development (IISD)** is an independent think tank championing sustainable solutions to twenty-first century problems. Its mission is to promote human development and environmental sustainability. Through research, analysis and knowledge sharing, IISD identifies and champions sustainable solutions that support sound policymaking. Established in 1990, the institute has offices in Canada, Switzerland and the United States, and its work impacts economies, communities, ecosystems and lives in nearly 100 countries. Numerous governments, United Nations agencies, foundations, the private sector and individuals fund its projects.

IISD has been assessing the characteristics, performance and market trends of voluntary sustainability standards via the State of Sustainability Initiatives (SSI) project since 2008. The SSI Reviews of 2010 and 2014 are the most comprehensive reports published to date offering supply-chain decision makers – including procurement agents, investment advisers, chief executives, policymakers, sustainability initiatives and non-governmental organizations – the high-level data and analysis needed to navigate the increasingly complex world of sustainability standards.

The institute was also instrumental in establishing the Committee on Sustainability Assessment (COSA) and the Sustainable Commodity Assistance Network (SCAN), which are now independent organizations focused respectively on measuring sustainability impact and building capacity for the adoption of VSS. In addition to conducting strategic policy research and analysis on standards, IISD continues to make important contributions to sustainable consumption and production through its sustainability standards programme.

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