

# The State of Sustainable Markets 2018

STATISTICS AND EMERGING TRENDS



### **How much of the world's agricultural and forestry production is certified as sustainable?**

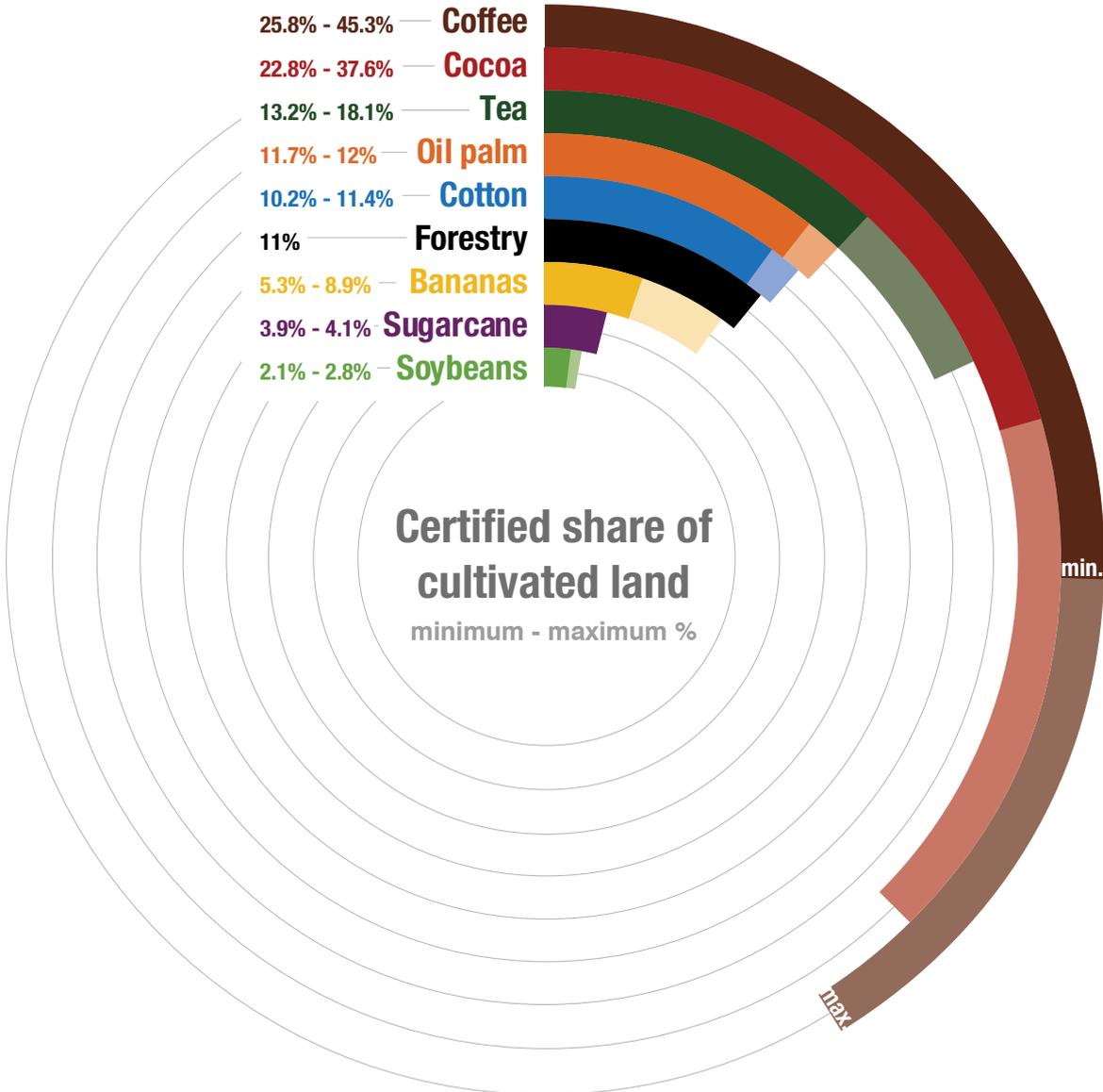
This is the world's most comprehensive report on sustainable markets, with data from 14 major sustainability standards for eight agricultural products, plus forestry.

The chart gives a snapshot of sustainable production today. It shows how much cultivated land is certified by at least one sustainability standard. At least a quarter of the world's land dedicated to coffee, for example, is now certified. But the real share may be closer to half of the world's coffee areas. This minimum and maximum range for each product is given because many producers have multiple certifications.

(For more about how the data is captured and assessed, see Chapter 4.)

# THE STATE OF SUSTAINABLE MARKETS 2018

## STATISTICS AND EMERGING TRENDS



Voluntary sustainability standards continue their growth across the world.

This third global report provides new insights into the evolution of certified agriculture and forestry. ITC has teamed up once more with the Research Institute of Organic Agriculture (FiBL) and the International Institute for Sustainable (IISD) to provide data about 14 major sustainability standards for bananas, cocoa, coffee, cotton, palm oil, soybeans, cane sugar, 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.

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For more information, see Sustainability Map ([www.sustainabilitymap.org](http://www.sustainabilitymap.org)) and visit the Trends module which presents data taken from this publication using interactive charts and graphs.

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## FOREWORD

The environment is at a global tipping point. Production and consumption as usual is no longer an option. With a little over a decade left to achieve the United Nations Sustainable Development Goals (SDGs) of the 2030 Agenda, we must speed up our actions and pilot solutions to existing problems. This takes global partnerships. It also takes reassessing the entire production and consumption value chain.

Producers, processors, brands, retailers and consumers have a responsibility to move towards a consensus on sustainability.

Why change our approach to how we produce and consume? A quick glance at commodity-based value chains is enlightening.

Bananas are the world's most popular fruit. The industry is the world's second largest user of agrochemicals, after cotton. What's more, virtually all bananas sold internationally are of one type, making bananas especially susceptible to changes in the market, in quality, and in consumer preferences.

Cocoa is another industry that deserves a deep dive. What are the realities of the smallholder farming and income opportunities along the cocoa value chain? How can we better close the price gap between the final product price and what the farmer actually gets in his or her pocket?

The cotton industry is another value chain susceptible to environmental change. In a time of water scarcity and continued population growth, the cotton industry is notorious for high water use and volatile prices.

Tea is the world's most popular drink (after water). To grow and process tea, deforestation and soil erosion are still common, along with worker safety related to agrochemical use.

In the sugarcane industry, a rapid rise in production addresses fast-growing consumer demand – at the cost of biodiversity in fragile ecosystems.

In many of these value chains, there also remains the spectre of child labour, forced labour and unjust conditions. Cleaning these value chains requires more than just greening them – we must ensure zero tolerance to any aspect of human rights abuses.

What can we do about it? How can we transform 'business as usual' into a more conscious approach to global sustainability?

While there is no silver bullet, we can make a difference by producing and consuming more sustainably. When consumers insist on accountability that protects their own health, the well-being of workers and that of our planet, big buyers listen. As a result, many buyers are increasingly working with producers using voluntary sustainability standards. For example, more than one-quarter of the world's coffee is produced using such standards.

Sustainability standards provide assurances that purchases support sustainability, and better connect consumers and producers. In doing so, these standards have become a mechanism to support SDG 12, which focuses on sustainable consumption and production.

While these standards have improved environmental and social conditions for production, data behind these standards are not always clear or comparable. This matters, because consumers, businesses and governments need accurate intelligence to make decisions that bring positive change.

The State of Sustainable Markets is the most comprehensive global data source available for certified agricultural commodity markets. Fulfilling its mandate to provide transparency and market intelligence on trade, ITC has teamed up with major research institutions and 14 of the world's largest sustainability

standards organizations for the eight agricultural products and forestry covered in this report. The data is updated constantly, using common methodology and reporting procedures.

ITC is pleased to partner with the Research Institute of Organic Agriculture (FiBL) and the International Institute for Sustainable Development to produce the third edition of this report, offering new insights into the evolution of certified markets.

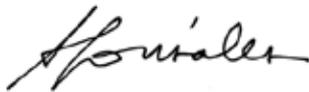
The report shows that agricultural land on which certified commodities are grown continues to increase, in some cases, surpassing the 20% mark. Cotton-certified areas are witnessing the highest growth rate, tripling between 2011 and 2016. Cocoa also almost tripled in area; and oil palm and tea-certified areas more than doubled during the same five-year span.

However, between 2015 and 2016, oil palm registered substantial declines (11.5% less than in 2015) as well as sugarcane (7.9% less).

While this report focuses on production, it is useful for a wide audience of policymakers, retailers, producer associations, investors, trade and investment support institutions – and even for the conscious consumer. The report provides insights for those who attach importance to the social and environmental conditions behind the products produced in their countries or sold in their nation's supermarkets.

Policymakers are getting the message and seeking to improve national production, lest they lose out to more sustainable locations for doing business. But challenges remain: high costs of certification; lack of harmonization among sustainability standards; and certification fatigue among brands and retailers looking to improve the situation on the ground without duplicative audits and elusive results.

In short, this year's report provides evidence that there is continued demand for sustainable production, and great scope for addressing challenges that can scale up sustainable trade – and help the world move away from 'business as usual'.



Arancha González  
Executive Director  
International Trade Centre

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The publishers would like to acknowledge Jason Potts, (1967 to 2018) whose work on advancing sustainable development through the design and use of effective voluntary standards and initiatives provided inspiration for developing the State of Sustainable Markets reports. At IISD, Jason led the State of Sustainability Initiatives, which tracks and issues regular reports on the characteristics, performance and market trends of sustainability initiatives internationally. His innovative leadership resulted in the creation of globally respected entities as the Committee on Sustainability Assessment, the Finance Alliance for Sustainable Trade and the Sustainable Commodity Assistance Network, all of which champion sustainable trade.

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## 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 (T4SD) is ITC's partnership-based programme that helps businesses chart their path 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 extension 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. Since 2008, this global data collection has been financially supported by the Swiss State Secretariat for Economic Affairs (SECO) in collaboration with ITC. NürnbergMesse, organizer of the BIOFACH organic food fair, and IFOAM – Organics International also provide support. See [www.organic-world.net](http://www.organic-world.net).

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 those 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 a public policy research institute renowned for its cutting-edge research on sustainable development. Established in 1990, its mission is to promote human development and environmental sustainability through innovative research, communication and partnerships. The Institute has offices in Canada, China, Switzerland and the United States, and

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