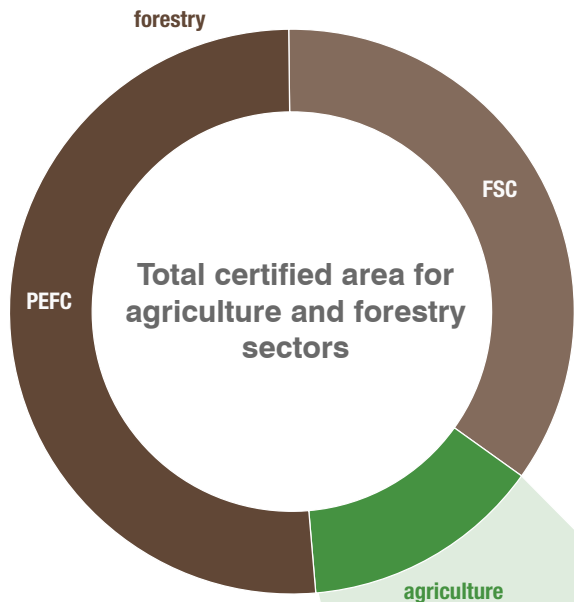


The State of Sustainable Markets 2017

STATISTICS AND EMERGING TRENDS





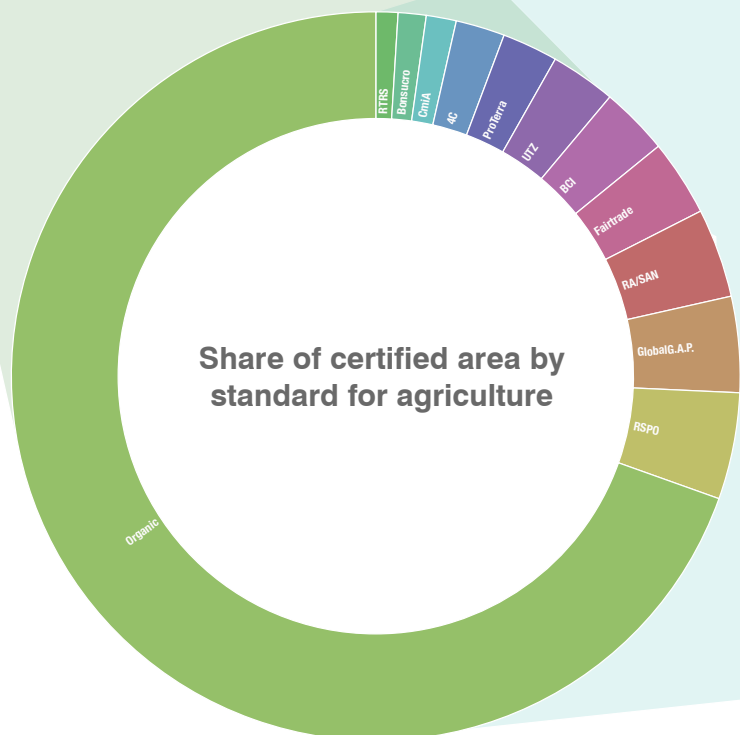
Sustainable production and trade allows us to produce, buy and sell in a way that ensures consumer protection, social responsibility and environmental sustainability.

This report features data on area, production volume and producers for 14 major voluntary sustainability standards covering forestry and eight agricultural products.

Collectively, these figures show that sustainable production and trade are no longer a novelty; they reflect consumer demand in mainstream markets.

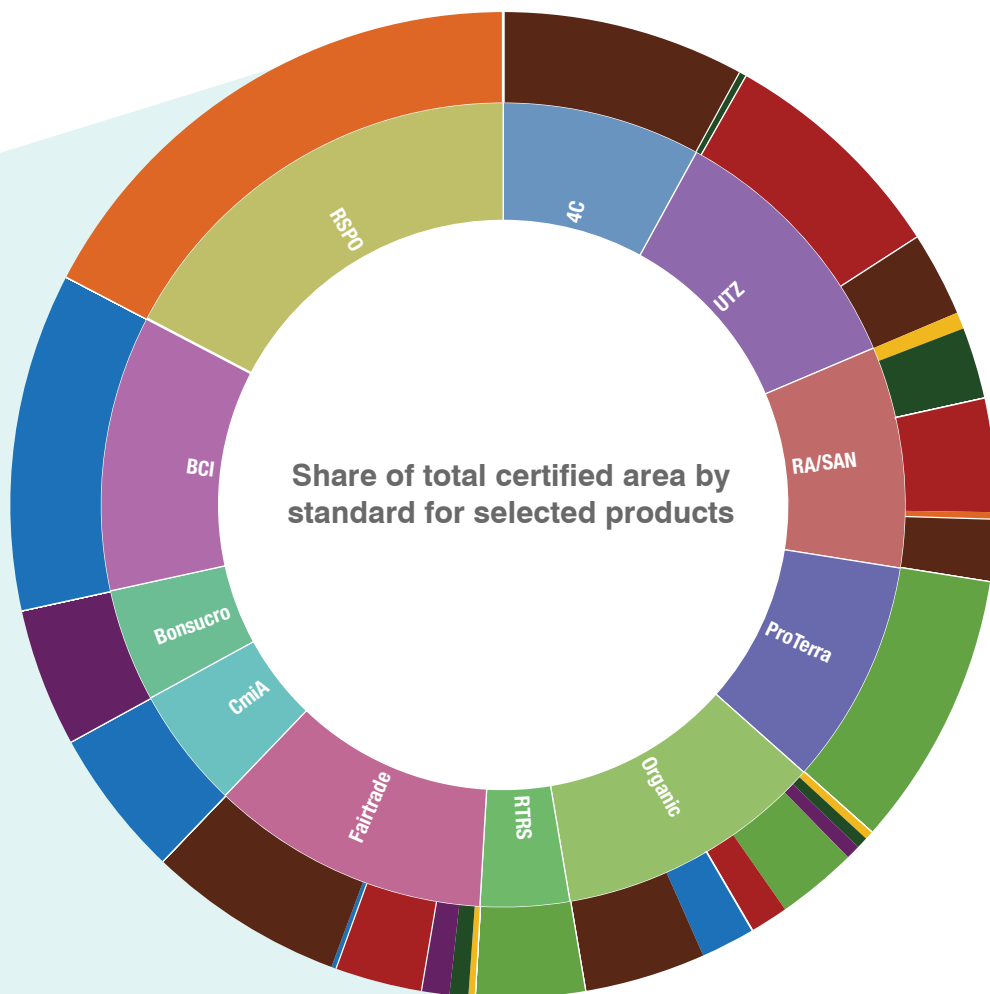
14 major voluntary sustainability standards:

- 4C
- Better Cotton Initiative
- BONSUCRO
- Cotton made in Africa
- Fairtrade International
- Forest Stewardship Council
- GLOBALG.A.P.
- IFOAM – Organics International
- Programme for the Endorsement of Forest Certification
- ProTerra Foundation
- Rainforest Alliance/Sustainable Agriculture Network
- Roundtable on Sustainable Palm Oil
- Round Table on Responsible Soy
- UTZ



THE STATE OF SUSTAINABLE MARKETS 2017

STATISTICS AND EMERGING TRENDS



Selected products

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

About the report

Voluntary sustainability standards are in the mainstream, and no longer a novelty for niche markets.

This second global report outlines data on area, production volume and producers for 14 major sustainability standards across bananas, cocoa, coffee, cotton, palm oil, soybeans, cane sugar, tea and forestry products.

The report is based on a partnership with the Research Institute of Organic Agriculture and the International Institute of Sustainable Development. The data can help shape decisions of policymakers, producers and businesses, working to address systemic labour and environmental challenges through certified sustainable production.

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Foreword from ITC

A growing world population, with its accompanying increase in the demand for food, is only heightened by climate change challenges. As environmental awareness grows, so too does the need to ensure the sustainability of what we consume.

Non-governmental organizations, the private sector and governments – including some in developing countries – are investing in voluntary sustainability standards and global supply chains. What does this mean for overall production and consumption patterns? What have recent efforts achieved, and where should they be directed next?

Assessing what works, what needs to be recalibrated and what practices are worth replicating to scale up sustainable production requires data – data on markets, impact, producer performance, certification and accessibility of voluntary standards. This is all the more important as we endeavour to report on progress towards the Sustainable Development Goals.

Over the years, ITC has made numerous contributions on data provision and transparency in the field of voluntary standards. The Trade for Sustainable Development Programme, with its database and website containing details on over 230 standard systems, codes of conduct and audit protocols, provides a unique point of departure for comparisons and projections on the future of sustainable value chains.

This year we are again partnering with the Research Institute of Organic Agriculture (FiBL) and the International Institute for Sustainable Development (IISD) to produce the second edition of the State of Sustainable Markets report, offering new insights into the evolution of certified markets. Among the most noteworthy developments:

All standards in the report continue to show growth of total certified area, albeit not at the same pace as in the past.

About a quarter of all coffee grown is compliant with at least one standard.

Organic continues to be the largest standard, currently covering 50.9 million hectares, but accounting for only 1.1% of agricultural land worldwide.

This report is intended for policymakers and consumers alike. Both of these groups attach increasing importance to the protection of their own health and to the social, environmental and economic conditions surrounding the products they buy. Consumers are exerting their influence with their pockets and with their voices. At the tap of a finger or the stroke of a key, they can make their views known throughout the twittersphere. One mobile phone video can be shared millions of times in just a few minutes. The importance of transparency is at an all-time high, pushing us to improve traceability, information-sharing and partnership.

Consumers are powerful, and not afraid to wield their power both on their own behalf and on that of the planet. They are helping to ensure that the environmental impact and labour conditions associated with agriculture are duly monitored, and that appropriate sustainability standards are adopted and respected. These and other trends in sustainable markets are grounds for optimism – a message that is driven home by the findings of this report.



Arancha González
Executive Director
International Trade Centre

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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. Our 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 T4SD 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 will be launching a new platform, the Sustainability Map, in September 2017, which will provide 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 Switzerland, Germany, Austria and France, as well as a representative office in Brussels. It also has 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, the Institute has developed a network of some 200 experts from more than 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 of Economic Affairs (SECO) in collaboration with the International Trade Centre (ITC). NürnbergMesse, organizer of the BIOFACH organic food fair, has supported the project since 2000. See 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 in 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, Switzerland, China and the United States of America, and operates in over 70 countries. It receives project funding from numerous governments, United Nations agencies, foundations, the private sector and individuals.

IISD has been working on assessing the characteristics, performance and market trends of VSS via the

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