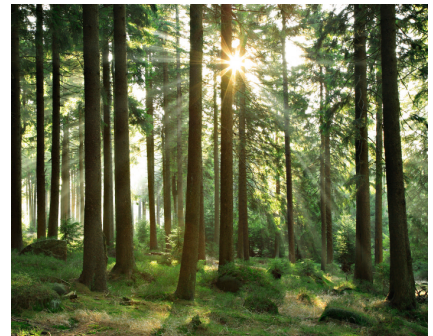




International
Trade
Centre

THE STATE OF SUSTAINABLE MARKETS

STATISTICS AND EMERGING TRENDS 2015



In collaboration with



THE STATE OF SUSTAINABLE MARKETS

STATISTICS AND EMERGING TRENDS 2015

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This report is a product of a partnership funded by the Swiss State Secretariat for Economic Affairs (SECO) between the Research Institute of Organic Agriculture (FiBL), the International Institute of Sustainable Development (IISD) and the International Trade Centre (ITC). It offers a pathway for formalizing the reporting process with a view to making data on sustainable markets more accessible to all; and provides a market data survey on Voluntary Sustainability Standards (VSS). Section one gives an overview of the VSS surveyed with a short description and key data; section two includes the production-related data for key global sustainability standards across nine commodity sectors, bananas, cocoa, coffee, cotton, forestry, palm oil, soybeans, cane sugar and tea; includes bibliographical references (pp. 143-145).

Descriptors: **Private Standards, Sustainable Development, Agriculture, Commodities, Eco-Labeling, Fair Trade, Organic Products, Market Surveys, Statistics.**

English

For further information on this technical paper, contact Gregory Sampson, ITC (Sampson@intracen.org). At FiBL, contact Julia Lernoud (julia.lernoud@fibl.org) and Helga Willer (helga.willer@fibl.org).

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Preface

It is becoming clear that if supply chains are not sustainable, then the trade impact that we aim for will not be sustainable. It will not deliver the growth and employment benefits that it should. All actors, from upstream farmers to the ultimate consumers, can benefit enormously if sustainability issues are placed at the heart of the trade discourse.

If implemented properly, agricultural supply chains can contribute to meeting the Global Goals for Sustainable Development of the United Nations, specifically Goals 2 (sustainable agriculture and food security), 8 (decent work), and 12 (sustainable consumption and production). Put simply, sustainable supply chains matter to everyone: the public and private sectors and consumers.

The Trade for Sustainable Development programme is the contribution of the International Trade Centre (ITC) to this growing reality. Launched six years ago, with the strong support of the Swiss State Secretariat for Economic Affairs (SECO), the fundamental goal is to promote sustainable supply chains as a means to help developing countries and their small and medium-sized enterprises (SMEs) add value to their products and services.

Based on the work in this area, a lack of robust and credible market and impact data on sustainable production was noted. How can SMEs and other market players understand that it makes sense to invest in sustainable production unless there is reliable data that points to commensurate economic and social impact at the SME level, including and relevance at the consumer level?

The 2015 report is our first joint attempt to provide an overview of the VSS landscape from the market perspective.

The Research Institute of Organic Agriculture (FiBL), the International Institute for Sustainable Development (IISD) and ITC have partnered to develop indicators and to systematically collect and report on voluntary sustainability standards (VSS) market trends. We would like to especially thank the participating standard organizations in this report and the International Social and Environmental Accreditation and Labelling Alliance (ISEAL) for their support, confidence, and patience. We value the collaboration and appreciate the interest and effort towards getting the details of this project right.

Our collective effort builds on the work IISD has been carrying out with the State of Sustainability Initiative reports over the last several years, leverages FiBL's many years of experience analysing and reporting on organic market data, and benefits from ITC experience and neutrality with its database and Standards Map which now reference over 185 voluntary sustainability standards.

This report have been compiled by the authors and its information is to the best of their knowledge correct. It has also been checked by FiBL, IISD, and ITC. However, the possibility of mistakes cannot be ruled out entirely. Therefore, the authors and publishers are not subject to any obligation and make no guarantees whatsoever regarding any of the statements or results in this work; neither do they accept responsibility or liability for any possible mistakes, or for any consequences of actions taken by readers based on statements or advice contained therein.

This document has been produced with the support of the Swiss State Secretariat for Economic Affairs (SECO). The views expressed herein can in no way be taken to reflect the official opinions of SECO and the standards/initiatives covered in this report.

In closing, we would like to express our thanks to SECO for its strong support and encouragement for this project.

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Jesus Aguirre Chavez, Fairtrade International, Bonn, Germany; Roberta Anderson, GLOBALG.A.P., United States of America; Jefferson Andrade, International Institute for Sustainable Development (IISD), Budapest, Hungary; Markus Arbenz, IFOAM – Organics International, Bonn, Germany; Lidya Ariesusanty, Indonesia Organic Alliance, Bogor, Indonesia; Thorsten Arndt, Programme for the Endorsement of Forest Certification (PEFC), Geneva, Switzerland; Larry Attipoe, Fairtrade International, Bonn, Germany; Shannon Avison, Better Cotton Initiative, Geneva, Switzerland;

Paulina Betancourt, Agrocalidad - Agencia Ecuatoriana de Aseguramiento de la Calidad del Agro, Quito, Ecuador; Joseph Cameron Booth, Rainforest Alliance/Sustainable Agriculture Network (RA/SAN), London, United Kingdom; Robin Callaghan, GLOBALG.A.P., Cologne, Germany; Veronica Chorkulak, Round Table on Responsible Soy, Buenos Aires, Argentina; Jon Copping, Ethical Tea Partnership, London, United Kingdom; Genaro Coronel, Servicio Nacional de Calidad y Sanidad Vegetal y de Semillas - Department of Organic Agriculture, Asunción, Paraguay;

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Salvador Garibay, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland; Maheswar Ghimire, Nepal; Denise Godinho, IFOAM – Organics International, Bonn, Germany; Catherine Greene, United States Department of Agriculture - Economic Research Service, Washington, United States of America; Yannic Grewe, GLOBALG.A.P., Cologne, Germany; Catherine Hardy, Rainforest Alliance/Sustainable Agriculture Network (RA/SAN), London, United Kingdom; Juan Isaza, 4C Association, Bonn, Germany; Marion Karmann, Forest Stewardship Council (FSC); Bonn, Germany; Joelle Khatto-Andrighetto, IFOAM – Organics International, Bonn, Germany; Christoph Kaut, Cotton Made in Africa, Hamburg, Germany; Kate Kilpatrick, Fairtrade International, Bonn, Germany;

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Kristian Möller, GLOBALG.A.P., Cologne, Germany, Vitoon Panyakul, Green Net, Bangkok, Thailand; Kendra Pasztor, Better Cotton Initiative, Geneva, Switzerland; Yuhui Qiao, Chinese Agricultural University,

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Bernhard Schlatter, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland; Monika Schneider, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland; Simone Schröder, GLOBALG.A.P., Cologne, Germany; Rita Schwentesius, Universidad Autónoma Chapingo, Chapingo, México; Rafael Seixas, Bonsucro, London, United Kingdom; Sonia Slavinski, Bonsucro, London, United Kingdom; Miyako Takahashi, Fairtrade International, Bonn, Germany; Mercedes Tallo, Rainforest Alliance/Sustainable Agriculture Network (RA/SAN), London, United Kingdom; Evonne Tan, Textile Exchange, Malaysia; Helena Tavares Kennedy, Roundtable on Sustainable Biomaterials, Geneva, Switzerland; Elisa Trepp, UTZ Certified, Amsterdam, Netherlands;

Liesl Truscott, Textile Exchange, Bath, United Kingdom; Rob Ukkerman, Forest Stewardship Council (FSC), Bonn, Germany; Anne Uyeda, Roundtable on Sustainable Biomaterials, Geneva, Switzerland; Paul van den Berge, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland; Inke van der Sluijs, Roundtable on Sustainable Palm Oil, Kuala Lumpur, Malaysia; Jan van Driel, Roundtable on Sustainable Palm Oil, Kuala Lumpur, Malaysia; Nicolas Viart, Bonsucro, London, United Kingdom; Fabian Waldmeier, Fairtrade International, Zurich, Switzerland; George Watene, 4C Association, Bonn, Germany; Ann Wilkings, International Institute for Sustainable Development (IISD), Barcelona, Spain; Jose Zapata, Ministerio de Agricultura, Agricultura Orgánica, Oficina de Control, Santo Domingo, Republica Dominicana.

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 economic development and to contribute to the achievement of the United Nations Global Goals for sustainable development.

Trade for Sustainable Development (T4SD) is ITC's partnership-based programme that provides comprehensive, verified and transparent information on Voluntary Sustainability Standards (VSS) through Standards Map and the SustainabilityXchange web platforms. The main objective of the overarching T4SD programme is to strengthen the capacity of producers, exporters, policymakers and private and public buyers to participate in more sustainable supply chains.

The **Research Institute of Organic Agriculture (FiBL)**, founded in 1973, is a centre for research and consulting on organic agriculture. FiBL's strengths are closely linked interdisciplinary research and the rapid transfer of knowledge from research to extension to agricultural practice. Alongside practical research, FiBL gives high priority to transferring knowledge into agricultural practice through advisory work, training and conferences. FiBL has offices in Switzerland, Germany and Austria and 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, FiBL has been in contact with 200 experts worldwide and has built a network of experts from more than 170 countries who contribute to the data collection. Every year, FiBL and IFOAM – Organics International jointly publish The World of Organic Agriculture. This book documents recent developments in global organic agriculture. Since 2008, the 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. For more information, see www.organic-world.net.

The **International Institute for Sustainable Development (IISD)** is a public policy research institute that has a long history of conducting cutting-edge research into 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, and operates in over 70 countries around the world. The Institute receives project funding from numerous governments inside and outside Canada, United Nations agencies, foundations, the private sector, and individuals.

IISD has been working on assessing the characteristics, performance and market trends of voluntary sustainability standards (VSS) via the State of Sustainability Initiatives (SSI) since 2008. The SSI Review 2010 and 2014, offer the most comprehensive reports published to date offering supply-chain decision makers – including procurement agents, investment advisors, CEOs, policymakers, sustainability initiatives and NGOs – with high-level data and analysis needed to navigate the increasingly complex world of sustainability standards. IISD was also instrumental in establishing of the Committee on Sustainability on Agriculture (CSA) and the Committee on Sustainable Aquaculture (CSA) and the Committee on Sustainable Aquaculture (CSA).

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