



EXCELLENCE FOR SUSTAINABILITY

Research Institute of Organic Agriculture
Forschungsinstitut für biologischen Landbau
Institut de recherche de l'agriculture biologique



Global survey on Voluntary Sustainability Standards (VSS)

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Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, February 2015

Partners

- › **Research Institute for Organic Agriculture (FiBL)**



- › **International Trade Centre (ITC)**



- › **State of Sustainable Initiatives (SSI)**



Supporter

- › **The Swiss State Secretariat of Economic Affairs SECO**



The State of Sustainability Initiatives Review 2014



- › Potts, et. al. (2014). The State of Sustainability Initiatives Review 2014. Standards and the Green Economy. International Institute for Sustainable Development (IISD), Manitoba, and the International Institute for Environment and Development (IIED), London.
http://www.iisd.org/pdf/2014/ssi_2014.pdf
- › FiBL contributed the organic figures for this report. FiBL compiled production data for some of the most important organic high-value cash crops: **bananas, cocoa, coffee, palm oil, tea, soy, and sugarcane**
- › When not available, which is the case for most countries, these data were calculated on the basis of the available area data for the selected crops that have been collected by FiBL and IFOAM.

VSS FiBL-ITC-SSI survey on VSS

› Indicators:

› **Area:**

- › Area fully converted, and in conversion, and total area
- › Total area harvested

› **Production:**

- › Production volume in metric tons and value in million USD
- › Production sold under the VSS label (volume in metric tons and value in million USD)

› **Trade:**

- › Export volume in metric tons and value in million USD
- › Export price in USD; annual average per ton FOB
- › Import volume in metric tons and value in million USD

› **Market:**

- › Domestic market volume in metric tons and value in million USD

› **Operators:**

- › Producers, processors, importers, exporters, traders (retailers, wholesalers), other types

Note: Market and trade data might be difficult to get from the VSS or the control bodies, the partner plan to use further sources to collect this data.

List of VSS



- › 4C Association
- › Better Cotton Initiative (BCI)
- › Bonsucro
- › Cotton Made in Africa
- › Ethical Tea Partnership
- › Fairtrade
- › Forest Stewardship Council (FSC)
- › Global Gap
- › International Federation of Organic Agricultural Movements (IFOAM-Organic)
- › Programme for the Endorsement of Forest Certification (PEFC)
- › ProTerra Foundation
- › Rainforest Alliance
- › Roundtable on Sustainable Biomaterials (RSB)
- › Roundtable for Sustainable Palm Oil (RSPO)
- › Round Table for Responsible Soy (RTRS)
- › UTZ



VSS FiBL-ITC-SSI survey

> **Crops and products**

This survey aims to collect as much information available as possible.

FiBL made a search through the different VSS websites and documents, and came up with a list of crops and products covered by the VSS selected. Around 80 crops/products are covered in the questionnaire.

For the survey on VSS, FiBL focuses on the products covered by Fairtrade, Rainforest Alliance and UTZ, that, after organic, have the highest variety of products.

> **Data providers**

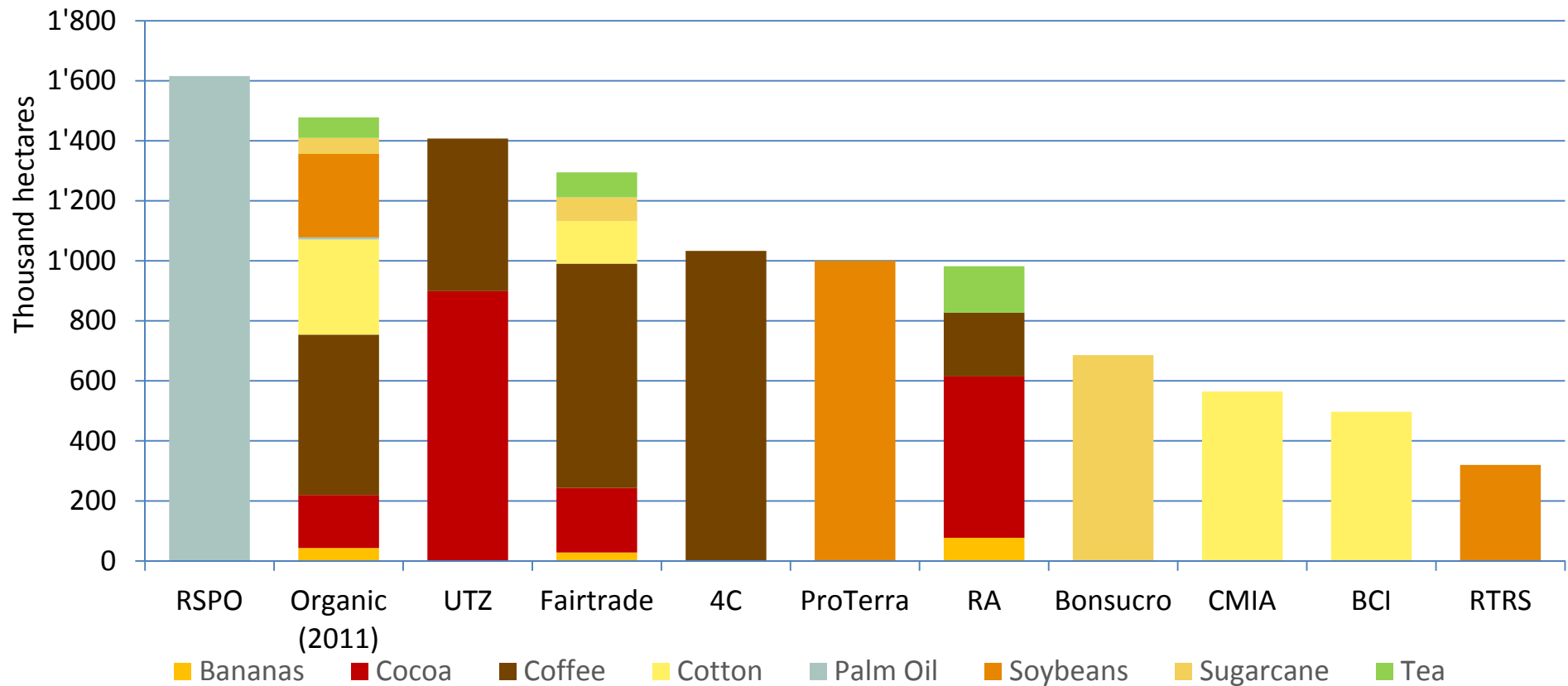
For more than 15 years, FiBL has been collecting data on organic agriculture and now has a network of more than 200 experts for its global organic farming survey.

For the survey on VSS, FiBL made an internet search to expand its contact list to experts and control bodies involved. A database with more than 300 contacts has been established.

Area covered by each VSS

Total harvested area certified by crop for selected crops 2012

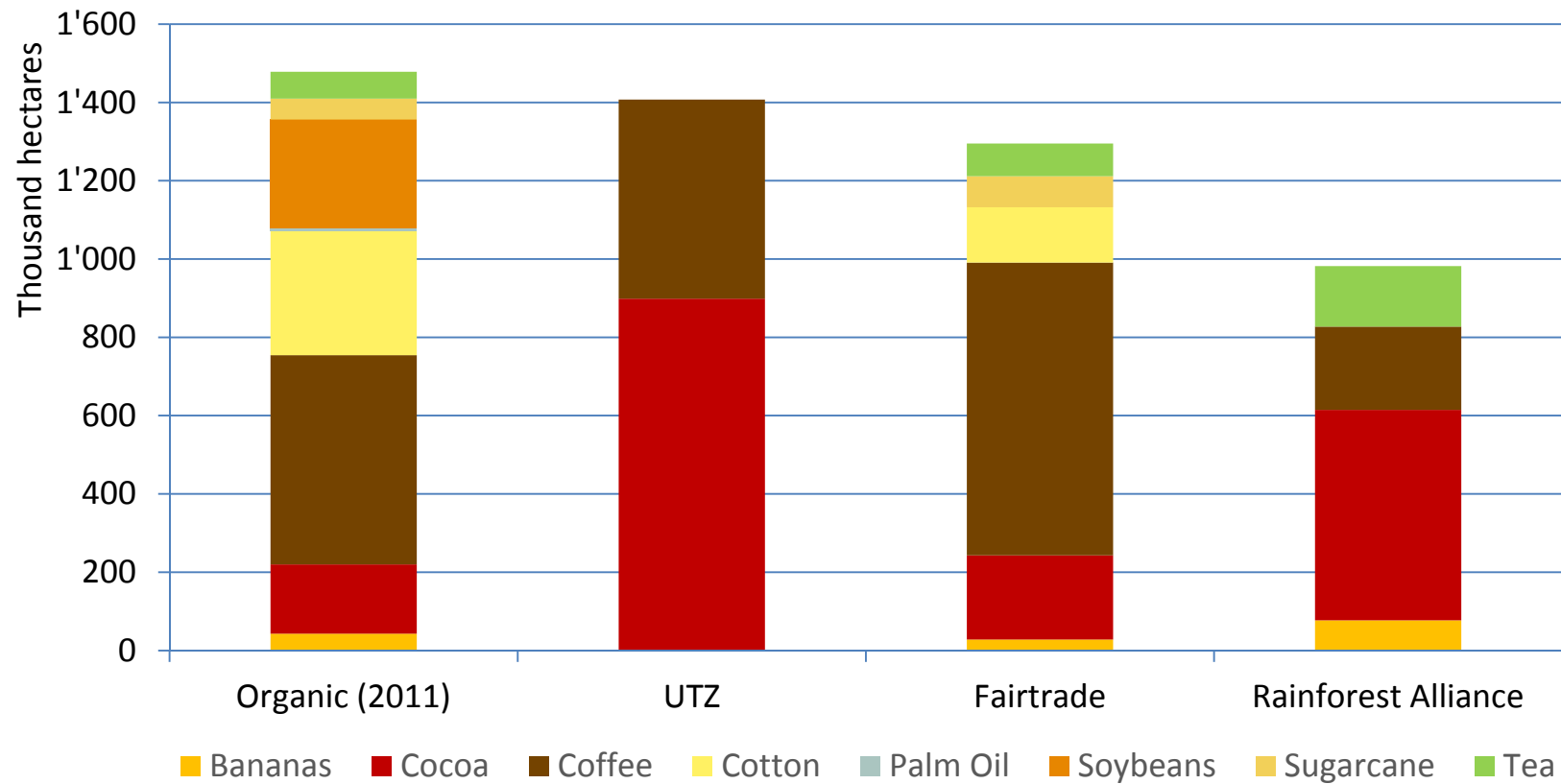
Source: SSI Report 2014 – The State of Sustainability Initiatives Review 2014



Area covered by each VSS

Total harvested area certified by crop for selected crops and selected VSS 2012

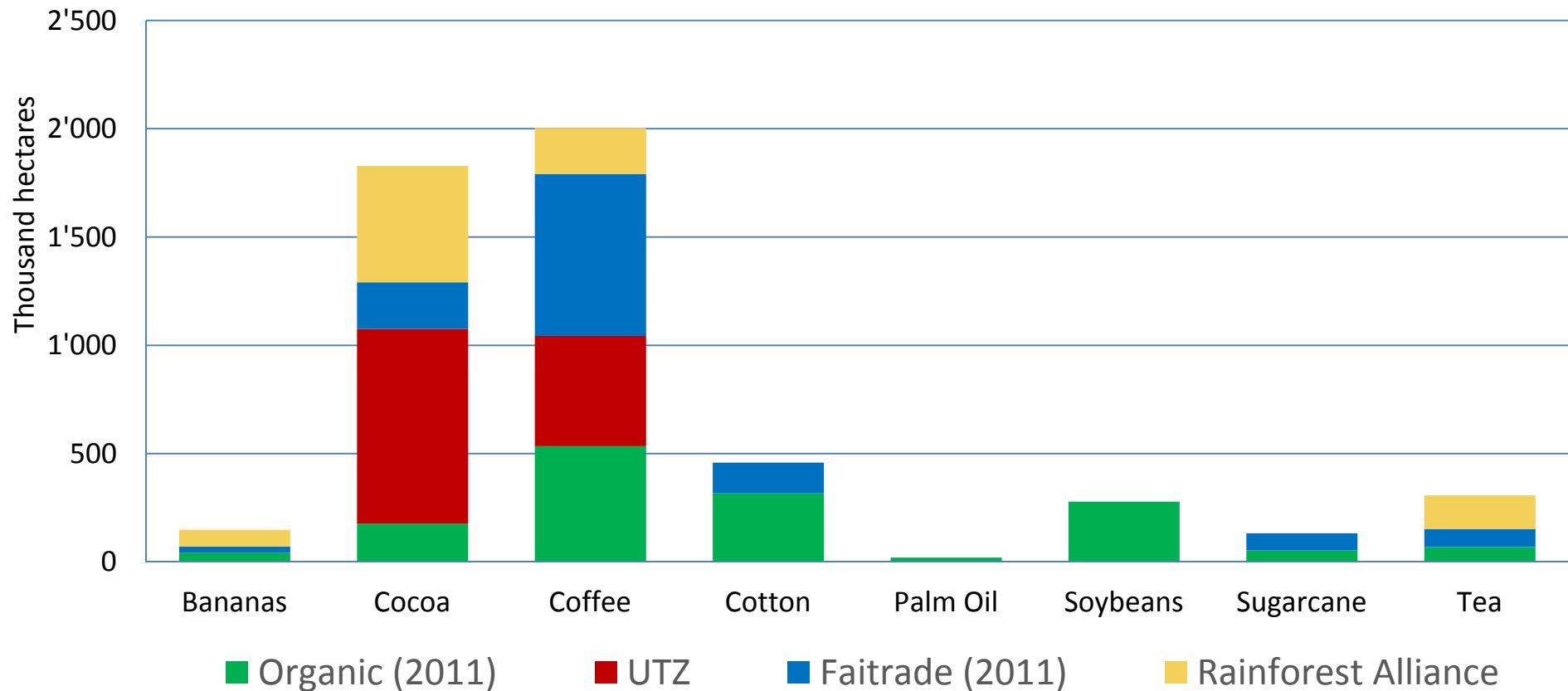
Source: SSI Report 2014 – The State of Sustainability Initiatives Review 2014



Area for selected crops covered by Voluntary Sustainability Standards

Total area certified by crop for selected crops 2012

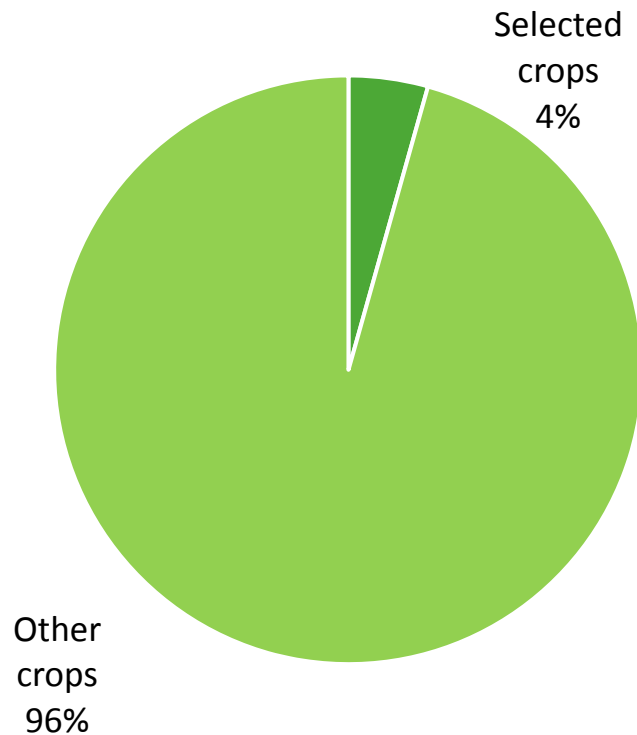
Source: SSI Report 2014 – The State of Sustainability Initiatives Review 2014



Comparison of the impact of the selected crops in the total Organic (43.1 million hectares) and Rainforest Alliance area: Share of the area for selected crops (2.02 million hectares)

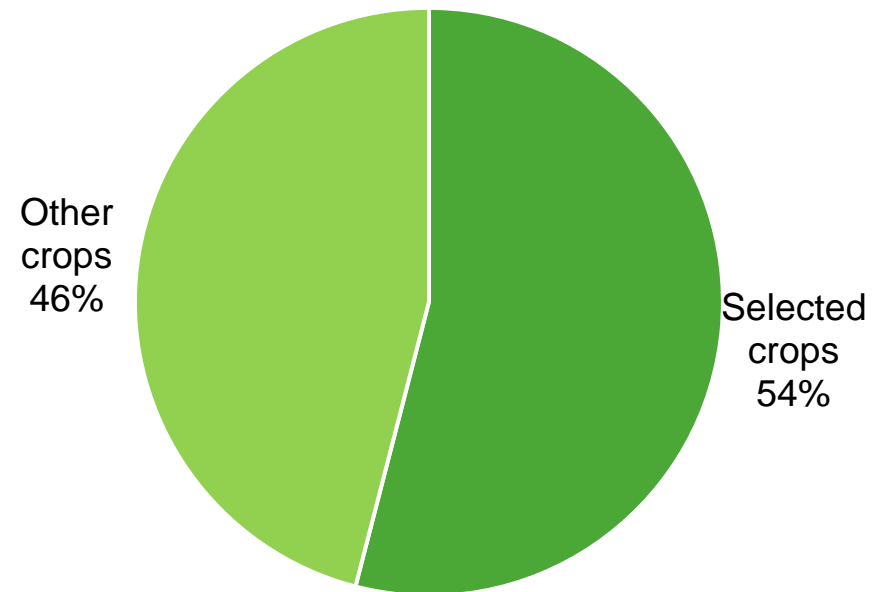
Share of selected crops (bananas, cocoa, coffee, cotton, oil palm, soybeans, sugarcane and tea) of the total organic area 2012

Source: SSI Report 2014 – The State of Sustainability Initiatives Review 2014 and FiBL Survey 2014



Share of selected crops (bananas, cocoa, coffee, cotton, oil palm, soybeans, sugarcane and tea) of the total Rainforest Alliance area 2012

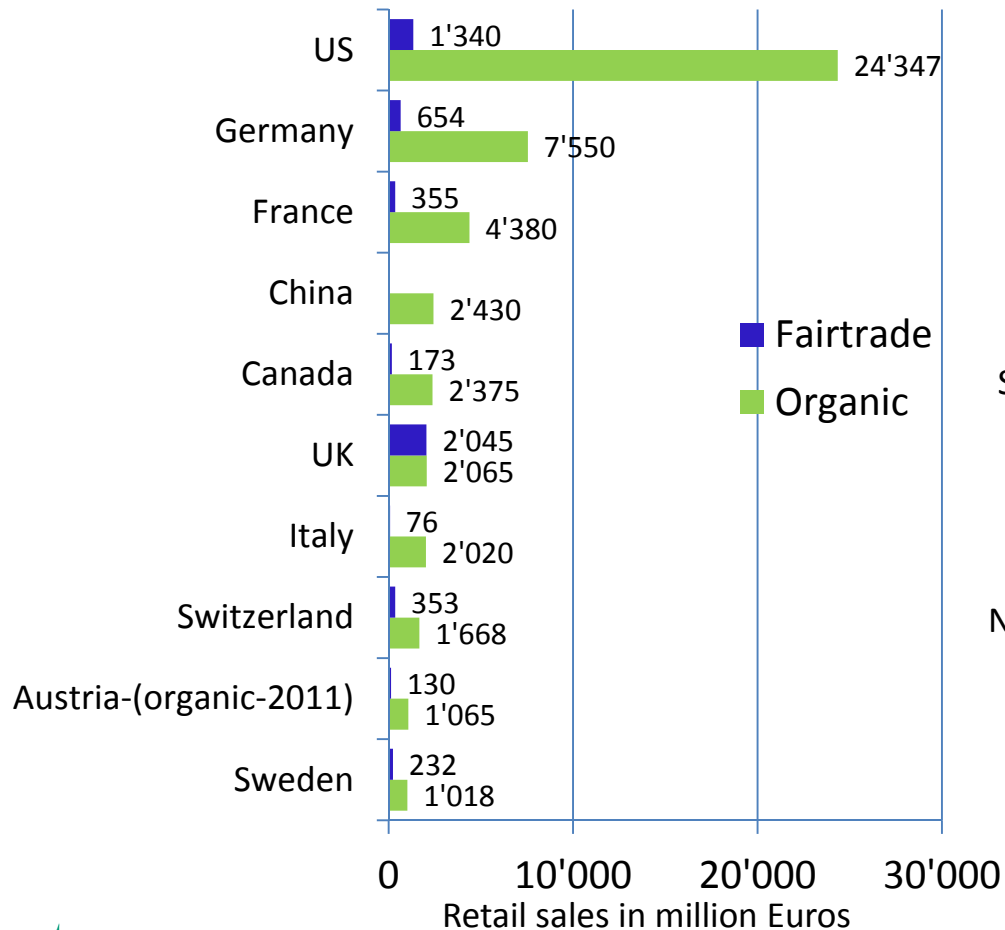
Source: SSI Report 2014 – The State of Sustainability Initiatives Review 2014 and Rainforest Alliance 2013



Fairtrade and Organic: The largest markets for organic and Fairtrade products 2013

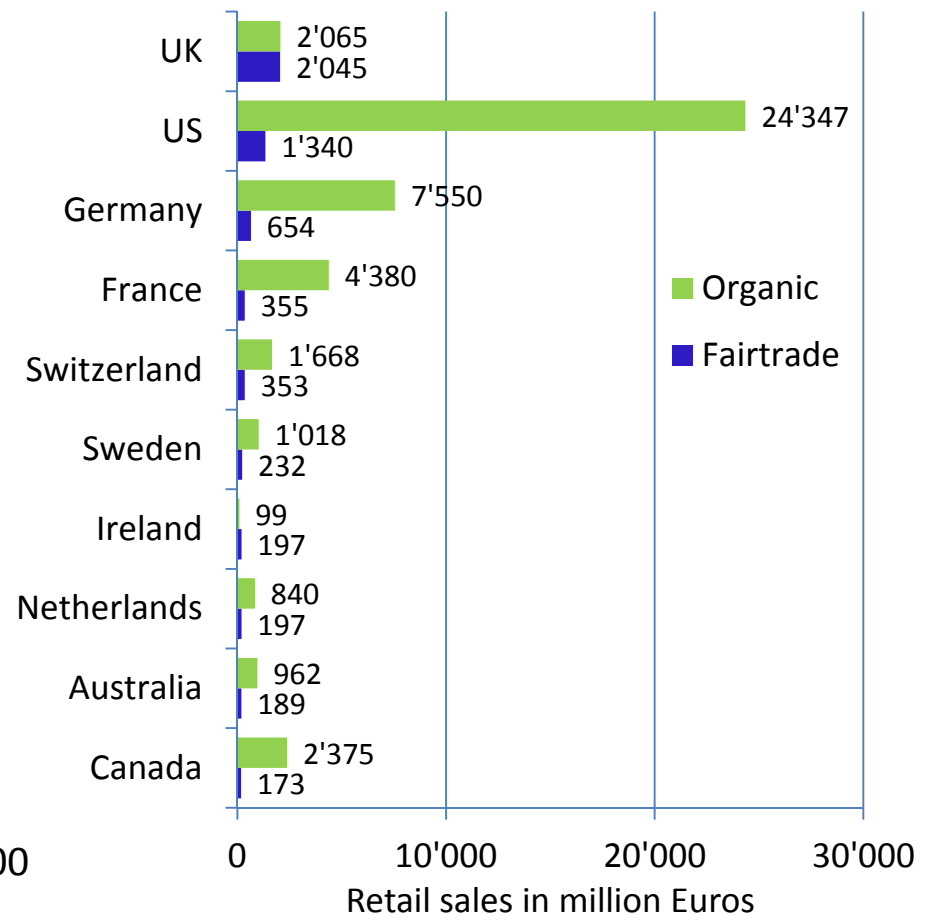
The ten countries with the largest markets for organic products 2013

Source: FiBL-AMI-OrganicDataNetwork survey 2015 and Fairtrade annual report 2013-2014 (Austria organic market data 2011)



The ten countries with the largest markets for Fairtrade products 2012

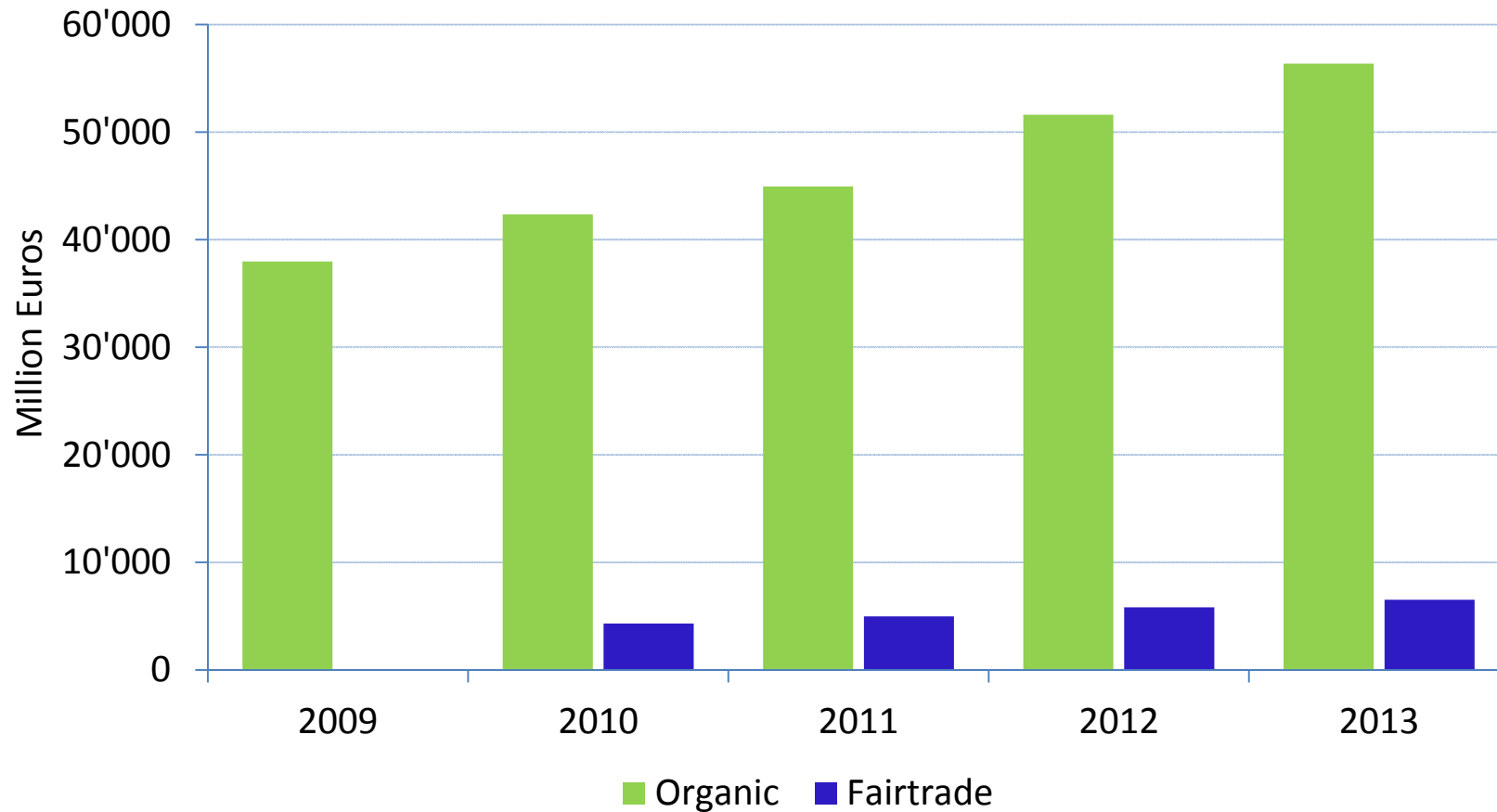
Source: FiBL-AMI-OrganicDataNetwork survey 2015 and Fairtrade annual report 2013-2014



Organic and Fairtrade: Global market development

Organic and Fairtrade: Development global retail sales 2009-2013

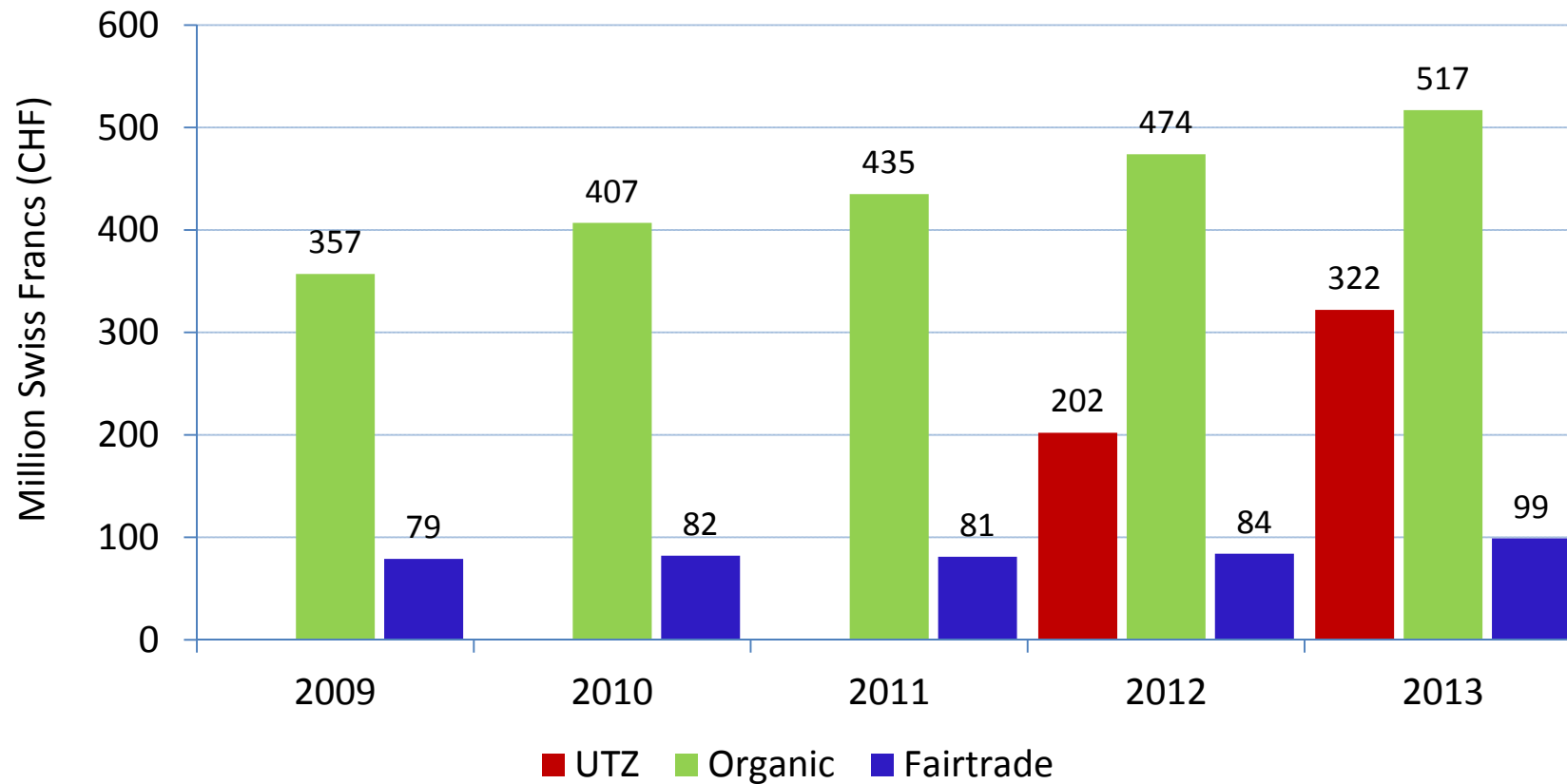
Source: FiBL Survey and Fairtrade (no market data for 2009)



Migros Switzerland: Retail sales of organic, UTZ and Fairtrade in Switzerland

Migros: Development of total UTZ, organic and Fairtrade retail sales in Switzerland 2009-2013

Source: Migros Switzerland 2014



Conclusions

- › Most of the VSS are growing very fast reaching high growth rates, but organic still has the lead with more hectares certified organic worldwide.
- › The VSS focus on a small range of products, and organic covers almost the whole product range.

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- › **Willer, Helga und Julia Lernoud
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