The State of Sustainable Markets 2024

STATISTICS AND EMERGING TRENDS

International Trade Centre

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International Institute for Sustainable Development

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The International Trade Centre (ITC) is the joint agency of the World Trade Organization and the United Nations.

Street address: ITC
54-56, rue de Montbrillant
1202 Geneva, Switzerland

Postal address: ITC
Palais des Nations
1211 Geneva 10, Switzerland

Telephone: +41-22 730 0111

Fax: +41-22 733 4439

E-mail: itcreg@intracen.org

Website: www.intracen.org

THE STATE OF SUSTAINABLE MARKETS 2024

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ABOUT THE REPORT

This eighth global report provides new insights into the evolution of certified agriculture and forestry. The International Trade Centre has teamed up once again with the Research Institute of Organic Agriculture and the International Institute for Sustainable Development to provide data on 13 major sustainability standards for bananas, cocoa, coffee, cotton, oil palm, soybeans, sugarcane, tea and forestry products.

This year's report adds data from 2022 and finds that growth continued after an unusual dip in 2020. The publication 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, contact: Gregory Sampson at sampson@intracen.org, Helga Willer at Helga.willer@fibl.org or Laura Kemper at laura.kemper@fibl.org.

For more information on sustainability standards see: www.sustainabilitymap.org/standards.

FOREWORD

Over the past year, the toll from environmental crises like climate change, biodiversity loss and pollution has continued to rise, devastating communities, countries and entire regions. More and more, governments and international bodies are introducing policies to address climate change, deforestation and other environmental and social ills—reinforcing the urgency to establish frameworks that can guide businesses through these challenges. Sustainability standards are one of the tools that can help, enabling businesses to demonstrate leadership, build trust and position themselves as drivers of sustainable trade.

In a rapidly evolving global economy, where supply chains span continents, sustainability standards help create consistency, transparency and accountability. They are valuable tools to combat greenwashing, ensure fair competition and promote ethical practices. While not without their challenges, these standards provide a foundation for businesses to align with consumer expectations and regulatory requirements.

This year's report on sustainable markets highlights encouraging trends. Certified areas continue to expand for many key crops, reflecting a growing commitment to sustainability. Standards including organic, Better Cotton, the Roundtable on Sustainable Palm Oil and Rainforest Alliance remain central to these efforts. In parallel, the rise of due diligence legislation underscores the growing importance of these standards, along with the need to see how standards and regulations can complement one another, and where harmonization is possible or where accompanying measures or support may be needed.

Our mission at the International Trade Centre is to foster connected, sustainable and inclusive trade, driven by micro, small and medium-sized enterprises. This report, alongside tools such as the Standards Map (www.standardsmap.org), equips businesses, policymakers and consumers with critical knowledge for navigating the complexities of sustainability and trade in the face of immense global challenges. We hope this report inspires you to act decisively in building a more sustainable and equitable future.

Pamela Coke-Hamilton
Executive Director
International Trade Centre

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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 thanks are due to all the standard-setting organizations that collaborated on the report: 4C, Better Cotton, Bonsucro, Cotton made in Africa (CmiA), Fairtrade International, Forest Stewardship Council (FSC), GLOBALG.A.P., 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 Textile Exchange.

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PROJECT PARTNERS

The **International Trade Centre**, 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. It builds on well-established online tools such as Standards Map, which offers comprehensive, verified and transparent information on more than 260 standards for environmental protection, worker and labour rights, economic development, quality and food safety, as well as business ethics.

Contribution to this report: Conceptual elaboration; data validation and visualization (dashboard).

The **Research Institute of Organic Agriculture**, 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 extensive experience in collecting and publishing data on organic agriculture. Since 2000, it 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. FiBL has also been active in the collection of data on sustainability standards since 2014.

For more information, see https://statistics.fibl.org

Contribution to this report: Data collection, processing, validation and visualization; authors of Chapters 1, 2 and 4.

The **International Institute for Sustainable Development** is an independent think tank with the mission to accelerate solutions for a stable climate, sustainable resources and fair economies. 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 affects 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 project since 2008. The project advances sustainable and inclusive value chains by providing credible and solutions-oriented research, dialogue and strategic advice for decision makers about voluntary sustainability standards and other supportive initiatives.

In addition to conducting strategic research and analysis on sustainability standards, IISD continues to make important contributions to sustainable consumption, production and trade through other initiatives implemented within the Economic Law Programme.

Contribution to this report: Authors of Chapter 3.

For more information, see https://www.iisd.org/ssi/ and https://www.iisd.org

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ACRONYMS

Unless otherwise specified, all references to dollars ($) are to United States dollars. Some figures may not add up to 100% due to rounding.

4C	Common Code for the Coffee Community
CAGR	Compound annual growth rate
CBI	Centre for the Promotion of Imports from developing countries
CmiA	Cotton made in Africa
CoC	Chain of custody
FAO	Food and Agriculture Organization of the United Nations
FAOSTAT	FAO corporate statistical database
FiBL	Research Institute of Organic Agriculture
FSC	Forest Stewardship Council
Ha	Hectare
IFOAM	IFOAM – Organics International
IISD	International Institute for Sustainable Development
ITC	International Trade Centre
MT	Metric tons
PEFC	Programme for the Endorsement of Forest Certification
RSPO	Roundtable on Sustainable Palm Oil
RTRS	Round Table on Responsible Soy
SECO	Swiss State Secretariat for Economic Affairs
SSI	State of Sustainability Initiatives
VSS	Voluntary sustainability standards

EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

Sustainability standards have become an essential component of global trade, driving the transition to more ethical, environmentally conscious, and socially responsible economic practices. These standards are not only a response to growing consumer demand for sustainable goods but also a strategic mechanism for businesses to comply with an evolving regulatory landscape emphasizing due diligence and sustainability. As mandatory regulations such as the EU Deforestation Regulation (EUDR) come into force, sustainability standards offer a proactive pathway for businesses to align their operations with these emerging legal requirements, fostering resilience and competitiveness.

In 2022, the landscape of sustainability standards continued to evolve, with market recovery gaining momentum after a slowdown in 2020. Single-sector standards maintained dominance, reflecting their specialized impact across various commodities. Highlights from this year's data include the continued prominence of four key crops—cotton, cocoa, oil palm, and sugarcane—accounting for significant certified areas globally:

The increasing emphasis on due diligence and sustainability legislation has positioned sustainability standards as vital tools to ensure compliance, promote transparency, and build consumer trust. By adhering to these standards, businesses not only demonstrate their commitment to sustainability but also prepare for stricter regulatory demands. The data in this report provide critical insights into the state of sustainable markets across key commodities—bananas, cocoa, coffee, cotton, oil palm, soybeans, sugarcane, tea, and forestry—and the progress of leading standard-setting organizations in advancing sustainable trade.

As the world continues to navigate the complexities of sustainability, this annual update serves as an invaluable resource for policymakers, businesses, and consumers. It offers a clear picture of the progress and challenges in promoting sustainable practices, empowering stakeholders to make informed decisions that support a sustainable and equitable global economy.

Highlights

Features of the current market context continued in 2022, with growth picking up after a dip in 2020. Dominance of single-sector standards remained in most sectors. Among the highlights of this year's report: [1]

The big four: Cotton, cocoa, oil palm and sugarcane

- In 2022, cotton continued to have the largest certified area. Cocoa was the second-largest commodity in terms of area certified in 2022, followed by oil palm and sugarcane (Table 1).
- Cotton: At least 6.6 million hectares or a minimum of 20.1% of the global cotton area was certified, 13.8% by Better Cotton alone.
- Cocoa: At least 3.65 million hectares or a minimum of 31.4% of the global cocoa area was certified, 28% by Rainforest Alliance alone.
- Oil palm: At least 3.58 million hectares or a minimum of 12.4% of the global oil palm area was certified, almost entirely by RSPO (12.4% of global oil palm area).
- Sugarcane: At least 3.04 million hectares or a minimum of 11.5% of the global sugar area was certified, 9% by Bonsucro alone.

Standard compliance rose for almost all crops

- Almost all crops covered in this report continued to grow in 2018–22. Soybean experienced the highest growth rate of its certified area, which grew by 49.9%. This was followed by sugarcane (+36.9%) and oil palm (+25.1%). Cocoa, cotton and banana all grew by 9%–15%, while tea remained relatively stable (+1.5%). The certified coffee area decreased notably in this period (-21.8%) (Table 1).
- The minimum certified area continued to grow slowly in 2021–22 (13.7%) after an unusual drop in 2019–20 (-4.2%) that was attributed to many factors, including the COVID-19 pandemic (Table 1 and Figure 4).
- In 2021–22, the certified area of three crops increased by more than one-third: cocoa (+44.5), soybean (+33.6%) and sugarcane (+31%). Banana, oil palm and coffee all grew by between 4%–7% while the certified cotton and tea areas shrunk (-1.4% and -10%, respectively) (Table 1).
- In 2022, the selected agricultural standards certified at least 9% of the global area of the selected agricultural commodities. For four crops, more than 10% of the global area of the crop in certified: at least 31.4% of the global cocoa area, at least 20.1% of the global cotton area, at least 15.2% of the global coffee area and at least 13% of the global tea area were certified by a standard (Table 1).

Organic is the leading standard in terms of total area certified

- Organic is the biggest sustainability standard in terms of both area and product variety. In 2022, more than 96.6 million hectares (ha) of agricultural land were certified as organic (including areas in the process of becoming organic-certified), representing 2% of agricultural land worldwide (Table 4).
- After organic, four standards covered land exceeding 4 million ha each. Of these, Rainforest Alliance certified the largest area (5.2 million ha), followed by RSPO (almost 4.9 million ha), Better Cotton (4.5 million ha) and GLOBALG.A.P. (4.5 million ha), each representing between 0.09% and 0.11% of global agricultural land (Table 4).
- All standards covered in this report, except Pro Terra and the Common Code for the Coffee Community (4C), expanded their compliant areas in 2018–22, most of them by double digits. Bonsucro saw the greatest jump, more than doubling its certified area (+109.6%), followed by RTRS (+60.5%), Organic (+36.3%) and RSPO (+30.8%) (Table 4).
- In 2021–22, four of the 11 agricultural standards[2] experienced double-digit area growth, with RTRS achieving the highest growth rate (+52.3%) (Table 4).

1. The commodity-specific data are based on the minimum possible values. For an explanation, see the section on reporting challenges.
2. The 13 standards included in this report are divided into 11 agricultural standards and two forestry standards (FSC and PEFC). The forestry standards are discussed separately as they only certify forest products and none of the other commodities included in the report.

Withdrawal of forest management certificates in Russia and Belarus leads to drop in certified forest area

- In 2021–22, the certified forest area decreased by 9.7%. The drop was due to the suspension of certificates in Russia and Belarus in connection with the war in the region (Table 3). Nevertheless, the certified area expanded by 1.1% in 2018–22.

Why this report?

This publication aims to inform readers, encourage additional data collection and promote accountability in sustainable markets. It also serves as a resource for further analysis and informed decision-making by researchers, policymakers, industry actors and other stakeholders.

The report presents a summary of the key data. The full data are available in the online platform Market Trends, where users can access and analyse the data in a visual, more dynamic and more user-friendly way. Country, commodity, forestry and sustainability standard-specific interactive graphs are available at www.standardsmap.org/en/trends.

Data from the latest survey (2022 data) demonstrate how certified agriculture and forestry continue to grow, in line with an expanding global population and increasing demand for sustainable products. The rising share of total area and production volume covered by voluntary sustainability standards (VSSs) suggests there is considerable potential for further growth.

The steady increase in certification over the past decade reflects demand among consumers, buyers and producers to address common environmental and social concerns. The agricultural commodities covered in this report are extremely important for food security, job creation and human development. Therefore, they must be produced in a sustainable way for these sectors to remain resilient. Although VSSs are present in these sectors, major challenges remain, including low farm-gate prices, climate change, slave labour, poor working conditions and land-grabbing issues.

One of the main challenges for most VSS-compliant markets is that supply outpaces demand. In some cases, VSS-compliant products such as certified palm oil and soybeans are not even labelled as such. Europe and North America already are demanding more VSS-compliant products. The key to expanding VSS-compliant consumption is to increase demand in new markets: emerging economies and producing countries, particularly in Asia.

Sustainability standards continue to play a vital role in enabling the shift of agricultural supply chains towards more sustainability and resilience. This will require greater transparency and traceability of goods through the value chain, lowering the vulnerability of supply chains to shocks and stresses, and the transition towards environmental recovery and regeneration.

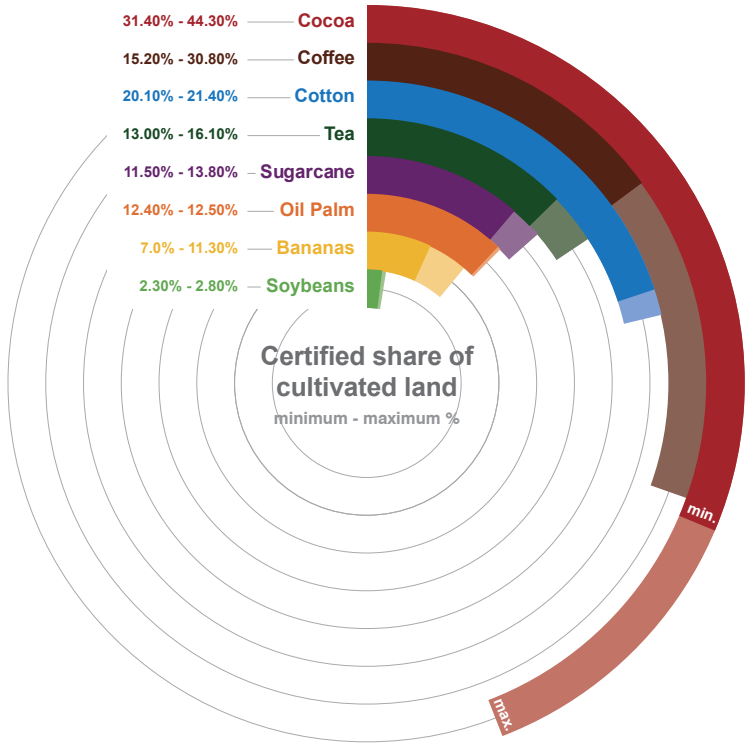
As in previous years, the Swiss State Secretariat for Economic Affairs (SECO) funded the global survey on sustainability standards. The Research Institute of Organic Agriculture (FiBL), the International Institute of Sustainable Development (IISD) and the International Trade Centre (ITC) jointly produced this report, building on their complementary and in-depth expertise on sustainability standards. The data presented here cover 2022, as well as earlier years.

Featured crops and standards

This report offers a comprehensive snapshot of significant growth in the adoption of global sustainability standards across nine sectors: bananas, cocoa, coffee, cotton, oil palm, soybeans, sugarcane, tea and forestry. It presents market and statistical data on these sectors as well as at-a-glance tables on products and standards.

The report covers the following standards: 4C, Better Cotton, Bonsucro, Cotton made in Africa, Fairtrade International, FSC, GLOBALG.A.P., organic, PEFC, ProTerra, Rainforest Alliance,[3] RSPO and RTRS.

Figure 1: Coffee and cocoa have largest share of the harvested area



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 13 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.

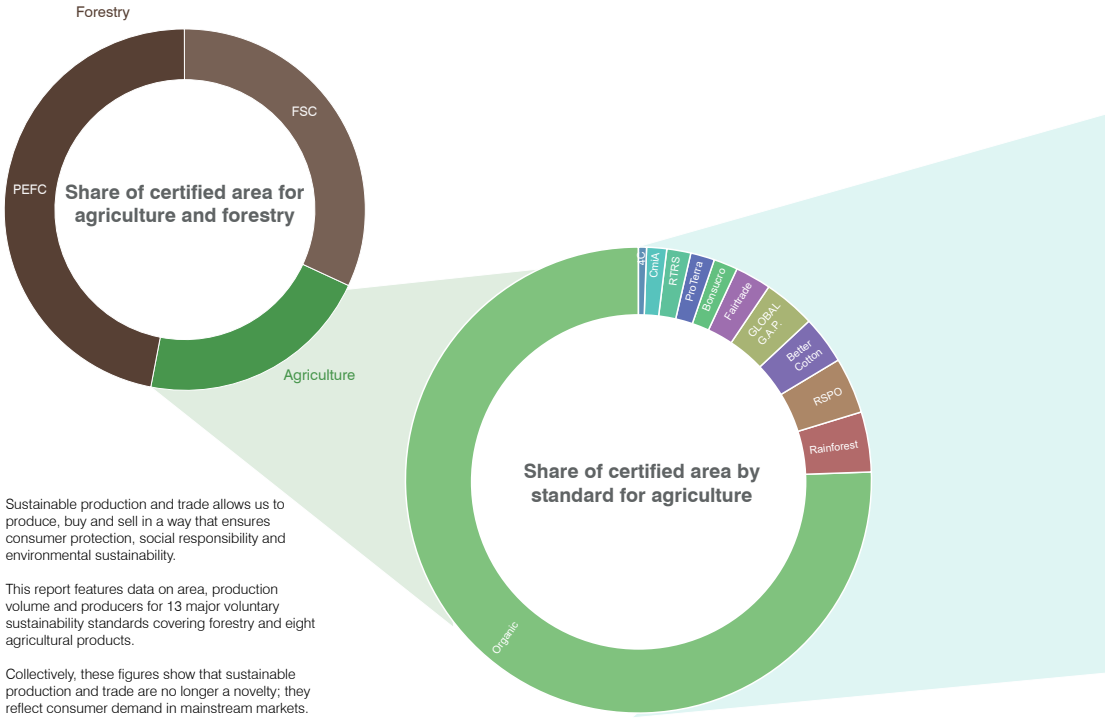
Almost a third of the world's land dedicated to cocoa, for example, is now certified. But the real share may be closer to half of the world's cocoa areas.

This minimum and maximum range for each product is given because many producers have multiple certifications.

Source: FiBL-ITC-IISD State of Sustainability Initiatives (SSI) survey, 2024.

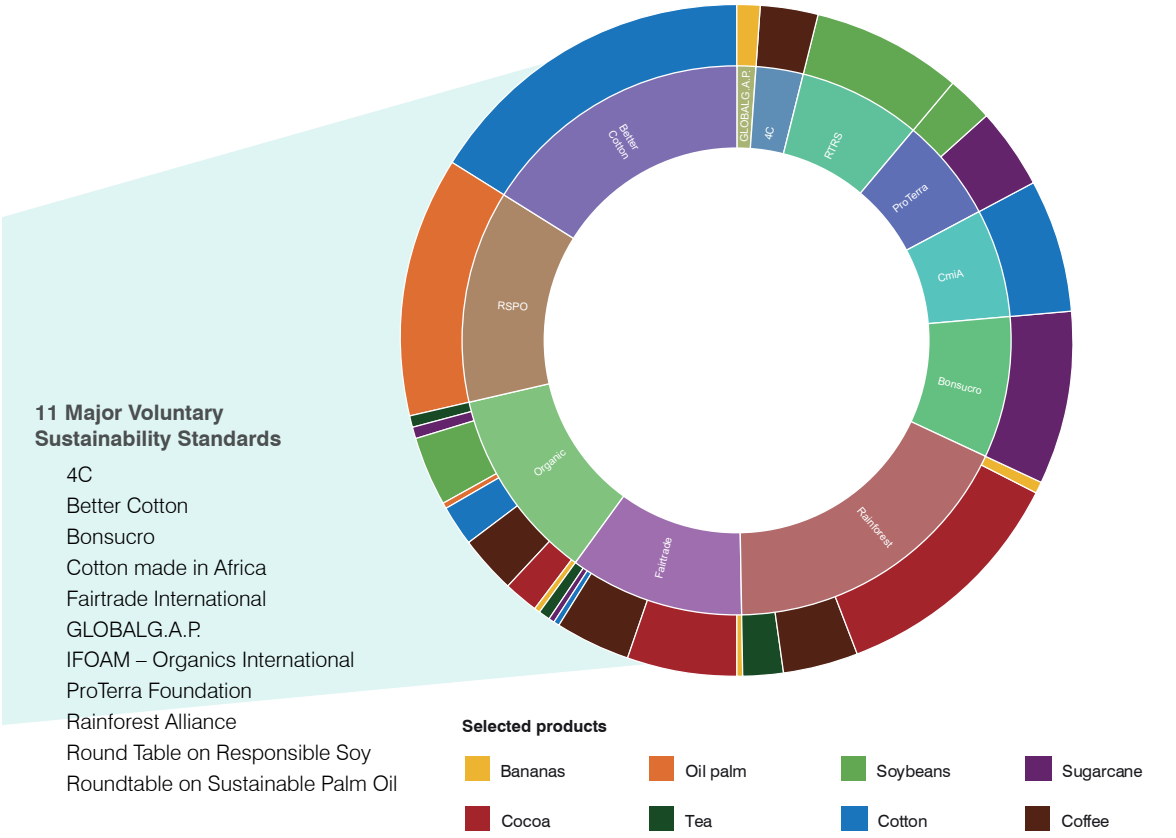
3. Although UTZ merged with Rainforest Alliance in 2018, data were merged fully in 2022 for the first time. As a result, the report no longer includes UTZ.

Figure 2: Organic is biggest agricultural standard, PEFC is biggest forestry standard



Source: FiBL-ITC-IISD/SSI survey, 2024.

Figure 3: Eleven agricultural voluntary standards and eight commodities analysed



Source: FiBL-ITC-IISD/SSI survey, 2024.

Reporting challenges: Lack of data, multiple certification

Policymakers, producers and businesses need better information for strategic planning. Higher-quality and more transparent data are not only essential on the supply side, but also on the demand side, as information on the prices of certified crops and on consumption patterns is needed. Data are also required on the international trade patterns of compliant products.

Furthermore, there is a need to expand reporting and transparency requirements for certified producers, broaden the Harmonized System coding system and increase both corporate reporting and reporting on sustainable consumption at the national level. Another challenge is that reporting a global total for individual sectors is difficult, because many producers are certified by more than one standard. There are not enough reliable data on the share of these multiple certifications.

For the purposes of this report, FiBL, IISD and ITC decided that the best approach was to work with the minimum as a reference, but to provide the maximum and average of the area or production volume as well. More information is available in the section on methodology.

Box 1 Multiple certification and data on total area and production

Reporting a global total for certain commodities is difficult, as many producers are certified by more than one sustainability standard and reliable data on the share of multiple certifications are limited. Bearing this in mind, FiBL, IISD and ITC opted to provide a range that encompasses the minimum and the maximum amounts possible, along with the average of the two at the country level.

To calculate the maximum amount, the total area or production of all standards in the country was determined. For the minimum, the standard with the largest area or greatest production volume in the country was used as the reference. An average of the maximum and minimum was then calculated. These figures must be treated with caution as they are estimates that indicate a trend.

Unless otherwise stated, the data presented show the minimum possible.

CHAPTER 1

SELECTED COMMODITIES GREW AGAIN IN 2022

By Laura Kemper, Bernhard Schlatter and Helga Willer

SELECTED COMMODITIES GREW AGAIN IN 2022

This chapter examines the harvested area and the production volume of the selected commodities on an aggregate level. As multiple certification remains an issue for some commodities, global totals were computed by adding the country minimums[4] (leading to a global minimum value for each commodity), the country maximums[5] (leading to a global maximum value for each commodity) and the country minimum–maximum averages[6] (leading to a global average value for each commodity).

Unless otherwise stated, the data presented in this section show the global minimum.

4. A country minimum corresponds to the area or production volume of the standard with the largest area or greatest production volume in that country.
5. A country maximum corresponds to the total area or production volume of all standards in that country.
6. A country average corresponds to the average of the country maximum and the country minimum.

At least 9% of the global harvested area of the eight crops is certified

Minimum area certified

In 2022, the standards covered in this report certified a minimum of 22.59 million hectares (ha) of the eight agricultural commodities that were studied: bananas, cocoa, coffee, cotton, oil palm, soybeans, sugarcane and tea. This constituted at least 9% of the global harvested area for these crops.

For the seventh consecutive year, **cotton** had the largest harvested area (four standards). With a minimum of 6.6 million ha, at least 20.1% of the global cotton area was certified.

Cocoa had the second-largest certified area (three standards). With a minimum of 3.65 million ha, at least 31.4% of the global cocoa area was certified.

The commodities with the third- and fourth-largest certified area were oil palm (three standards) and sugarcane (four standards). Certified **oil palm** covered at least 3.58 million ha, representing 12.4% of the global oil palm area. Certified **sugarcane** covered a minimum of 3.04 million ha, corresponding to at least 11.5% of the global sugarcane area.

Certified **soybeans** (three standards) and **coffee** (five standards) covered a minimum of 2.93 million ha and 1.72 million ha, respectively, representing at least 2.3% and 15.2% of the global soybean and coffee areas, respectively.

The commodities with the smallest certified area were tea (three standards) and bananas (four standards). Certified **tea** covered a minimum of 0.68 million ha, representing at least 13% of the global tea area, and certified **bananas** covered a minimum of 0.37 million ha, corresponding to at least 7% of the global banana area (Table 1).

Table 1: Minimum harvested area certified by agricultural commodity in 2022

Commodity	Area harvested (ha)	Share of global crop area	Area growth 2021-2022	Area growth 2018-2022
Bananas	373,628	7.0%	6.6%	9.0%
Cocoa	3,652,454	31.4%	44.5%	15.1%
Coffee	1,716,952	15.2%	4.2%	-21.8%
Cotton	6,601,230	20.1%	-1.4%	12.2%
Oil palm	3,583,461	12.4%	6.5%	25.1%
Soybeans	2,934,165	2.3%	33.6%	49.9%
Sugarcane	3,040,492	11.5%	31.0%	36.9%
Tea	684,527	13.0%	-10.0%	1.5%
Total based on minimum	*22,586,909*	9%	13.7%	16.9%
Total (based on average)	*25,315,233*	10.1%	8.9%	12.4%
Total (based on maximum)	*28,043,549*	11.2%	5.3%	9.1%

Note: The data in this table were not adjusted for multiple certifications, so the minimum possible is reported. The total VSS or VSS-compliant area corresponds to the standard with the largest compliant area operating within a given sector by country.

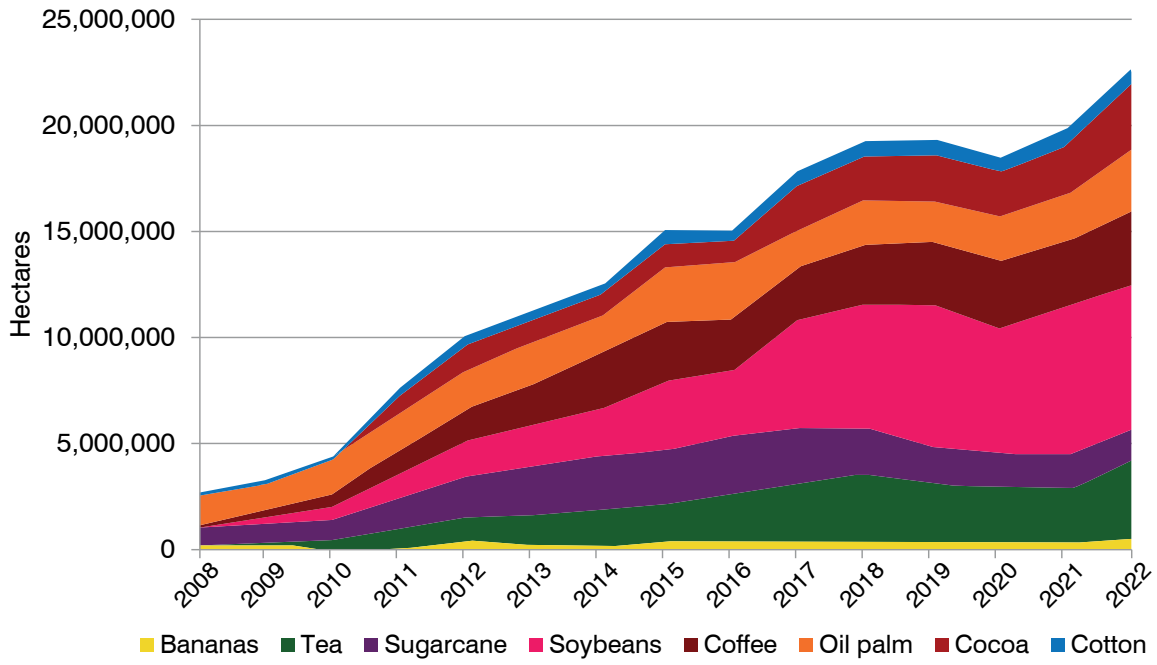
Source: State of Sustainability Initiatives (SSI) survey by the Research Institute of Organic Agriculture (FiBL), the International Institute for Sustainable Development (IISD) and the International Trade Centre (ITC), 2024: 4C Services, 2014–16, 2018–24; Better Cotton, 2014, 2015, 2017–24; Bonsucro, 2014–16, 2018–24; Cotton made in Africa, 2014–16, 2018–24; Fairtrade International, 2017–24; GLOBALG.A.P., 2015, 2016, 2018–24; FiBL survey, 2008–24; ProTerra Foundation, 2014–16, 2018–24; Rainforest Alliance, 2014–16, 2018–24; Roundtable on Sustainable Palm Oil, 2019–24; Round Table on Responsible Soy, 2014–16, 2018–24; Textile Exchange 2013–24.

Growth of minimum certified area

In 2018–22, the minimum certified area of the selected crops expanded by 16.9%. The certified soybean area grew the most (+49.9%), followed by sugarcane (+36.9%) and oil palm (+25.1%). Cocoa, cotton and banana area all grew by 9%–15% while the certified tea area remained relatively stable (+1.5%). Coffee was the only commodity to lose ground during this period (-21.8%) (Table 1 and Figure 4).

In 2021–22, the minimum certified area grew (+13.7%) for a second year in a row after an unusual drop in 2019–20 that was at least in part due to the COVID-19 pandemic. The minimum certified cocoa area grew the most (+44.5%), followed by soybean (+33.6%) and sugarcane (31%). The smallest growth rates were recorded for banana, at 6.6%, oil palm, at 6.5%, and coffee, at 4.2%. The minimum certified cotton area shrank by 1.4% and the minimum certified tea area dropped by 10% (Table 1 and Figure 4).

Figure 4: Evolution of minimum area certified by agricultural commodity, 2008–22



Note: The data in this table were not adjusted for multiple certifications, so the minimum possible is reported. The total VSS-compliant area corresponds to the standard with the largest compliant area operating within a given sector by country.

Sources: FiBL-ITC-IISD/SSI survey, 2024: 4C Services, 2014–16, 2018–24; Better Cotton, 2014, 2015, 2017–24; Bonsucro, 2014 – 2016, 2018 – 2024; Cotton made in Africa, 2014–16, 2018–24; Fairtrade International, 2017–24; GLOBALG.A.P., 2015, 2016, 2018–24; FiBL survey, 2008–24; ProTerra Foundation, 2014–16, 2018–24; Rainforest Alliance, 2014–16, 2018–24; Roundtable on Sustainable Palm Oil, 2019–24; Round Table on Responsible Soy, 2014–16, 2018–24; Textile Exchange 2013–24.

For all statements made on agricultural commodities in this chapter, it should be noted that, for methodological reasons, we are referring to the minimum possible values. To calculate this, we assume that multiple sustainability standards certify all areas. The minimum corresponds to the standard with the largest compliant area operating within a given sector. Readers should bear in mind that the per-crop areas, shares and growth rates may be considerably higher.

Minimum production volume certified

Production data are often incomplete[7] and/or based on estimates. For organic, the production volumes presented in Table 2 were computed based on partly estimated data. Therefore, both production shares and growth rates need to be interpreted with care, particularly if they differ from area shares and growth rates presented in Table 1. Please note that production data for cotton, oil palm and sugarcane were not available.

Of the five commodities listed in Table 2, cocoa had the highest share of global certified production (based on the minimum): 41.8% of the global cocoa production, followed by coffee (24.7%). The production shares were lower for certified bananas (7.7%), tea (6.1%) and soybeans (2.4%).

Production in 2018–22 grew the most for soybeans (+43.9%), cocoa (+38.2%), tea (+17.2%) and bananas (+0.6%). Coffee production declined by 8.1%.

In 2021–22, the production volume of certified cocoa grew the most, rising by 83.1%, followed by soybeans (41.2%). Tea and coffee grew by 4.8% and 3.3%, respectively, and banana production declined (-6.4%) (Table 2).

Table 2: Estimated minimum production by agricultural commodity in 2021–22

Commodity	Estimated minimum production [metric tons or MT]	Share of global crop production	Production growth 2021–22	Production growth 2018–22
Bananas*	9,585,897	7.7%	-6.4%	0.6%
Cocoa	2,330,188	41.8%	83.1%	38.2%
Coffee	2,445,592	24.7%	3.3%	-8.1%
Soybeans	8,864,368	2.4%	41.2%	43.9%
Tea	1,638,961	6.1%	4.8%	17.2%

**** Production volume of bananas is missing for GLOBALG.A.P.***

Note: The data in this table were not adjusted for multiple certification, so the minimum possible is reported. The total VSS-compliant production corresponds to the standard with the largest compliant production operating within a given sector by country.

Sources: FiBL-ITC-IISD/SSI survey, 2024: 4C Services, 2014–16, 2018–24; Fairtrade International, 2017–24; GLOBALG.A.P., 2015, 2016, 2018–24; FiBL survey, 2008–24; ProTerra Foundation, 2014–16, 2018–24; Rainforest Alliance, 2014–16, 2018–24; Round Table on Responsible Soy, 2014–16, 2018–24.

7. No minimum production values were estimated for cotton, oil palm and sugarcane due to a substantial amount of missing production data for these commodities.

Certified forest shrunk by 9.7%

The Programme for the Endorsement of Forest Certification (PEFC) and the Forest Stewardship Council (FSC) certified more than 418.76 million[8] hectares of forest in 2022, representing 10.3% of the global forest area. In 2018–22, the combined PEFC- and FSC-certified forest area grew by 1.1%, with a decrease of 9.7% in 2021–22 (Table 3). The drop was due to the suspension of certificates in Russia and Belarus in connection with the war in the region (Table 3).

For forestry, no production data are available.

Table 3: FSC and PEFC certified area, 2022

Commodity	FSC and PEFC certified area [ha]	Share of global forest area	Area growth 2021–22	Area growth 2018–22
Forest	418,756,807	10.3%	-9.7%	1.1%

Note: FSC and PEFC joined forces in 2016 and produced a common data set with multiple certification considered. The joint data set is available for the years 2000, 2005, 2010 and 2015–24.

Sources: FiBL-ITC-IISD/SSI survey, 2024: FSC-PEFC, 2024.

Agricultural and forestry products – highlights by commodity

This section provides an overview of the area certified for each of the selected sectors (bananas, cocoa, coffee, cotton, palm oil, soy, sugarcane, tea and forestry) for 2022. Little information is available about the share of multiple certification. Therefore, the section below provides information on the area range, spanning from the minimum area possible (data are adjusted to remove all possible multiple certification) to the maximum area possible (data are not adjusted for multiple certification).

Table 7 and Table 9 show area and production ranges by commodity. Table 8 and Table 10 show area and production by commodity and standard.

Data by country are available at www.sustainabilitymap.org/trends.

Bananas

- Four of the 13 standards covered in this report certified the production of bananas, namely **Fairtrade International, GLOBALG.A.P.**, **organic** and **Rainforest Alliance** (Table 8).
- Combined, they certified at least 373,628 ha, representing 7% of the global banana area. Assuming there was no double certification among the four standards, their common certified area would amount to 598,125 ha (maximum), representing 11.3% of the global banana area (Table 7).
- In 2018–22, the minimum certified banana area grew by 9% (Table 7).
- In 2021–22, the minimum certified banana area grew by 6.6% (Table 7).
- **GLOBALG.A.P.**, with 342,930 ha, certified the largest banana area, representing 6.5% of the global banana area (Table 8).
- **Fairtrade International** experienced the highest growth in 2018–22 (+22.4%) and was the only standard to grow in 2021–22 (+0.6%, reaching 50,347 ha). (Table 8).

8. FiBL computed the total area certified by FSC and PEFC based on data from FSC and PEFC with respect to certified area by standard and estimated double-certified area.

Cocoa

- Three of the 13 standards covered in this report certified the production of cocoa, namely **Fairtrade International**, **organic** and **Rainforest Alliance** (Table 8).
- Combined, they certified at least 3.65 million ha, representing 31.4% of the global cocoa area. Assuming there was no double certification among the three standards, their common certified area would amount to 5.16 million ha (maximum), representing 44.3% of the global cocoa area (Table 7).
- In 2018–22, the minimum certified cocoa area increased by 15.1% (Table 7).
- In 2021–22, the minimum certified cocoa area increased by 44.5% (Table 7). This was the largest one-year increase of all commodities.
- With more than 3.27 million hectares, **Rainforest Alliance** certified the biggest cocoa area, representing 28% of the global cocoa area (Table 8).
- **Rainforest Alliance** achieved the highest growth in 2018–22 (+351.4%) and in 2020–021 (+531.1%) (Table 8). The significant increase is largely due to the merger with UTZ. The data for the two standards were merged in 2022 for the first time.

Coffee

- Four of the 13 standards covered in this report certified the production of coffee, namely the **Common Code for the Coffee Community** (4C), **Fairtrade International**, **organic** and **Rainforest Alliance** (Table 8).
- Combined, they certified at least 1.72 million ha, representing 15.2% of the global coffee area. Assuming there was no double certification among the five standards, their common certified area would be almost 3.49 million ha (maximum), representing 30.8% of the global coffee area (Table 7).
- In 2018–22, the minimum certified coffee area decreased by 21.8% (Table 7).
- In 2021–22, the minimum certified coffee area increased by 4.2% (Table 7).
- **Fairtrade** certified the largest coffee area – more than 1 million ha – representing 9% of the global coffee area (Table 8).
- **Rainforest Alliance** achieved the highest growth in 2018–22: its certified coffee area more than doubled in that period. It also showed the biggest growth in 2021–22 (+73.9%) (Table 8). The significant increase is largely due to the merger with UTZ. The data for the two standards were merged in 2022 for the first time.

Cotton

- Four of the 13 standards covered in this report certified the production of cotton, namely **Better Cotton**, **Cotton made in Africa** (CmiA), **Fairtrade International** and **organic** (Table 8).
- Combined, they certified at least 6.6 million ha, representing 20.1% of the global cotton area. Assuming there was no double certification among the four standards, their common certified area would amount to more than 7 million ha (maximum), representing 21.4% of the global cotton area (Table 7).
- In 2018–22, the minimum certified cotton area expanded by 12.2% (Table 7).
- In 2021–22, the minimum certified cotton area decreased by 1.4% (Table 7).
- **Better Cotton** certified the biggest cotton area by far, with 4.55 million ha, representing 13.8% of the global cotton area (Table 8).
- **Organic** achieved the highest growth in 2018–22 (+74.6%) and Fairtrade International achieved the highest one-year growth (+26.1% in 2021–22) (Table 8).

Oil palm

- Three of the 13 standards covered in this report certified the production of oil palm, namely **organic**, **Rainforest Alliance** and **Roundtable on Sustainable Palm Oil** (RSPO) (Table 8).
- Combined, they certified at least 3.58 million ha, representing 12.4% of the global oil palm area. Assuming there was no double certification among the three standards, their common certified area would be only marginally higher, amounting to 3.61 million ha (maximum), representing 12.5% of the global oil palm area (Table 7).
- In 2018–22, the minimum certified oil palm area expanded by 25.1% (Table 7).
- In 2021–22, the minimum certified oil palm area expanded by 6.5% (Table 7).
- **RSPO** certified nearly all the oil palm area – 3.57 million ha – representing 12.4% of the global oil palm area (Table 8).
- **Organic** achieved by far the highest four-year and one-year growth: its certified area increased by 416% in 2018–22 and by 36.4% in 2021–22, reaching 44,120 ha or 0.15% of the global oil palm area in 2022 (Table 8).

Soybeans

- Three of the 13 standards covered in this report certified the production of soybeans, namely **organic**, **ProTerra Foundation** and the **Round Table on Responsible Soy** (RTRS) (Table 8).
- Combined, they certified at least 2.93 million ha, representing 2.3% of the global soybean area. Assuming there was no double certification among the three standards, their common certified area would amount to 3.67 million ha (maximum), representing 2.8% of the global soybean area (Table 7).
- In 2018–22, the minimum certified soybean area increased by 49.9%, thus representing the largest growth of all commodities in this period (Table 7).
- In 2021–22, the minimum certified soybean area increased by 33.6%, thus representing the second-largest growth of all commodities (after cocoa) in this period (Table 7).
- **RTRS**, with more than 2.03 million ha, certified the largest soybean area, representing 1.6% of the global soybean area (Table 8).
- **RTRS** achieved the highest four-year growth and one-year growth: its certified area grew by 60.5% in 2018–22 and by 52.3% in 2021–22 (Table 8).

Sugarcane

- Four of the 13 standards covered in this report certified the production of sugarcane, namely **Bonsucro**, **Fairtrade International**, **organic** and **ProTerra Foundation** (Table 8).
- Combined, they certified at least 3.04 million ha, representing 11.5% of the global sugarcane area. Assuming there was no double certification among the four standards, their common certified area would amount to 3.63 million ha (maximum), representing 13.8% of the global sugarcane area (Table 7).
- In 2018–22, the minimum certified sugarcane area expanded by 36.9% (Table 7), thus representing the second-largest growth of all commodities (after soybeans) in this period.
- In 2021–22, the minimum certified sugarcane area increased by 31% (Table 7).
- **Bonsucro**, with more than 2.38 million ha, certified the largest sugarcane area, representing 9% of the global sugarcane area (Table 8).
- **Bonsucro** also achieved the highest growth in 2018–22; its certified area more than doubled (+110.8%) (Table 8). It also had the highest one-year growth with a 27.8% increase in 2021–22 (Table 8)

Tea

- Three of the 13 standards covered in this report certified the production of tea, namely **Fairtrade International**, **organic** and **Rainforest Alliance** (Table 8).
- Combined, they certified at least 684,527 ha, representing 13% of the global tea area. Assuming there was no double certification among the three standards, their common certified area would amount to 844,837 ha (maximum), representing 16.1% of the global tea area (Table 7).
- In 2018–22, the minimum certified tea area expanded by 1.5% (Table 7).
- In 2021–22, the minimum certified tea area decreased by 10% (Table 7).
- **Rainforest Alliance** certified the largest tea area – 578,566 ha – representing 11% of the global tea area (Table 8).
- **Organic** achieved the highest four-year and one-year growth; its certified area grew by 58.1% in 2018–22 and by 19.2% in 2021–22 (Table 8).

Forestry

- Two of the 13 standards covered in this report certified forestry, namely **PEFC** and **FSC** (Table 3).
- Combined, they certified a forest area of 418.76 million ha, representing 10.3% of the global forest area[9] (Table 3).
- In 2018–22, the combined PEFC- and FSC-certified forest area grew by 1.1%, with one-year decrease in 2021–22 of 9.7% (Table 3).
- As in previous years, the PEFC-certified area exceeded the FSC-certified area in 2022. With more than 288 million ha of forest, 7.1% of the global forest area was PEFC-certified. The area decreased by 6.9% in 2018–22 and by 12.3% in 2021–22. FSC reported 196.69 million ha of certified forest, representing 4.9% of the global forest area, and decreases of 0.2% in 2018–22 and 14.7% in 2021–22 (Table 5).

9. FSC provided estimates of double certification (more than 66 million hectares in 2022), allowing us to calculate the total certified forest area without minimum, maximum and average calculations.

CHAPTER 2

DEVELOPMENT OF THE SELECTED STANDARDS

By Laura Kemper, Bernhard Schlatter and Helga Willer

DEVELOPMENT OF THE SELECTED STANDARDS

This chapter examines the selected sustainability standards on an aggregate level, considering the full range of commodities each standard certified (and not only the selected nine commodities covered in this report). For this purpose, this chapter focuses on variables for which an aggregation across commodities is meaningful – namely, a standard's certified area and its producers/certificate holders.

Please note: Due to multiple certification, it is impossible to determine the global certified area or the global number of producers for all sustainability standards together.

Organic covers the widest mix of agriculture products

Area certified

Organic is the sustainability standard with the largest variety of agricultural products and has by far the largest area certified (Willer et al., 2024). A total of 96.6 million hectares[10] were organic-certified in 2022, representing 2% of all agricultural land worldwide.

Of the remaining 11 agricultural standards, four covered land exceeding 4 million ha each in 2022. Of these, Rainforest Alliance certified the largest area (5.24 million ha), followed by RSPO (almost 4.89 million ha), Better Cotton (4.55 million ha) and GLOBALG.A.P. (4.5 million ha), each representing between 0.09% and 0.11% of global agricultural land (Table 4).

Strong growth in area certified

The area of most sustainability standards expanded by double digits in 2018–22. Bonsucro had the most growth in this period, more than doubling its certified area. It was followed by RTRS (+60.5%), organic (+36.3%) and RSPO (+30.8%). Rainforest Alliance, GLOBALG.A.P. and Fairtrade all grew by 16%–17% while Better Cotton and CmiA only grew by 9.2% and 2.5%, respectively. 4C Services and ProTerra declined by 37%[11] and 3%, respectively (Table 4).

In 2021–22, RTRS showed the most growth (+52.3%), followed by Bonsucro and organic (both more than 25%) and ProTerra (12.7%). Four standards (RSPO, CmiA, 4C and GLOBALG.A.P.) grew between 4% and 7%. Rainforest Alliance's certified area remained relatively stable, while two standards (Fairtrade and Better Cotton) experienced a decline in area certified (Table 4). The largest absolute growth was noted for organic, which increased by upwards of 20 million hectares.

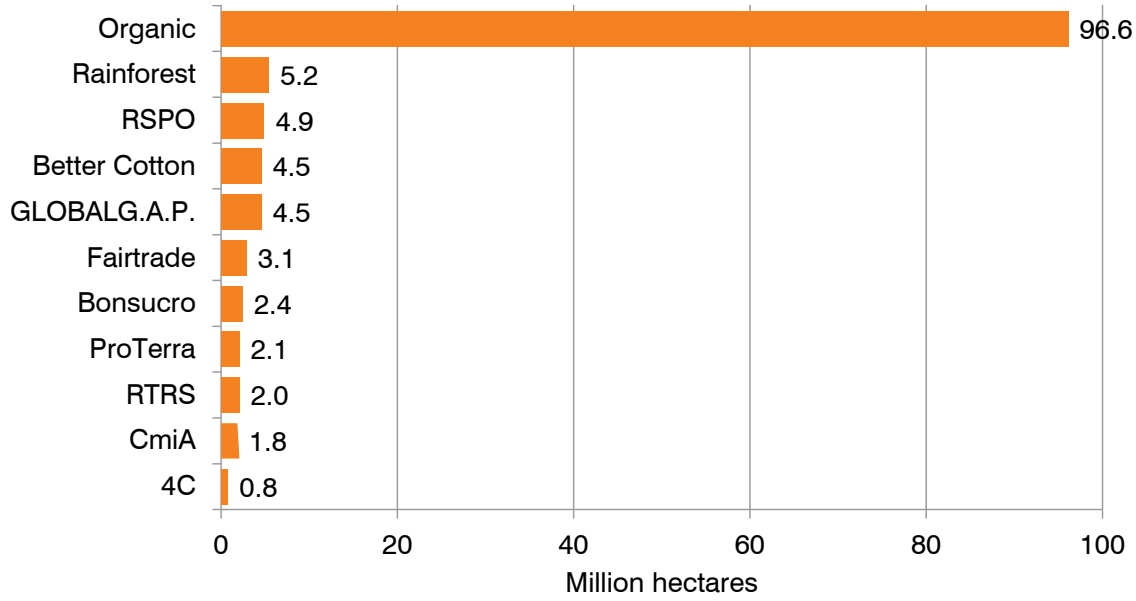
Number of producers

As the standard with the biggest certified area, organic also has the most producers – 4.5 million in 2022. Still, Fairtrade and Better Cotton, which certified much smaller areas than organic, each had more that 1 million producers:[12] Fairtrade reported 1.85 million producers and Better Cotton certified 1.52 million producers (Table 4).

This apparent contradiction can be explained by the fact that most of the sustainability standards examined in this report focus on the Global South, where smallholders prevail. In contrast, organic is prominent globally, including in countries where large farms dominate, such as Australia and the United States. It should also be noted that the producer data for organic are incomplete for many countries.

10. This includes land that is in the process of becoming certified as organic.
11. This can mainly be explained by the more rigorous certification procedures by the 4C standard.
12. Producer data were not available for Rainforest Alliance in 2022, but it has also certified more than 1 million producers in previous years.

Figure 5: Total area certified by selected VSSs in 2022



Note: This figure shows the total area certified by sustainability standards, including all commodities each VSS certifies, hence going beyond the eight agricultural commodities examined in this report. For organic, the reported number also includes permanent grazing areas, which account for more than two-thirds of the total area certified.

Sources: FiBL-ITC-IISD/SSI survey, 2024: 4C Services, 2024; Better Cotton, 2024; Bonsucro, 2024; Cotton made in Africa, 2024; Fairtrade International, 2024; GLOBALG.A.P., 2024; FiBL survey, 2024; ProTerra Foundation, 2024; Rainforest Alliance, 2024; Roundtable on Sustainable Palm Oil, 2024; Round Table on Responsible Soy, 2024; Textile Exchange 2024.

Table 4: Area certified and producers by agricultural standard in 2022

Standard	Area certified [ha]	Producers [no.]	Share of global agricultural area	Area growth 2021–22	Area growth 2018–21
4C	831,900	307,590	0.02%	5.0%	-37.4%
Better Cotton	4,548,909	1,518,863	0.10%	-5.4%	9.2%
Bonsucro	2,379,399	159	0.05%	27.8%	109.6%
CmiA	1,824,743	901,798	0.04%	7.0%	2.5%
Fairtrade	3,080,520	1,848,268	0.06%	-2.5%	16.1%
GLOBALG.A.P.	4,506,825	192,062	0.09%	4.3%	16.9%
Organic	96,610,720	4,502,778	2.02%	26.7%	36.3%
ProTerra	2,136,304	105,328	0.04%	12.7%	-3.0%
Rainforest Alliance[13]	5,242,966		0.11%	0.6%	17.1%
RSPO	4,893,346	167,467	0.10%	7.2%	30.8%
RTRS	2,028,070	66,374	0.04%	52.3%	60.5%

Note: This table shows the total area certified by sustainability standards, including all commodities each VSS certifies, hence going beyond the eight agricultural commodities examined in this report. For organic, the reported number also includes permanent grazing areas, which account for more than two-thirds of the total area certified.

Sources: FiBL-ITC-IISD/SSI survey, 2024: 4C Services, 2014–16, 2018–24; Better Cotton, 2014, 2015, 2017–24; Bonsucro, 2014–16, 2018–24; Cotton made in Africa, 2014–16, 2018–24; Fairtrade International, 2017–24; GLOBALG.A.P., 2015, 2016, 2018–24; FiBL survey, 2008–24; ProTerra Foundation, 2014–16, 2018–24; Rainforest Alliance, 2014–16, 2018–24; Roundtable on Sustainable Palm Oil, 2019–24; Round Table on Responsible Soy, 2014–16, 2018–24; Textile Exchange 2013–24.

13. Rainforest Alliance did not have producer data for 2022.

PEFC outpaces FSC on forest area certification, though FSC is growing faster

Area certified

The forest area certified by PEFC exceeded the forest area certified by FSC in 2022 as well as in preceding years. With 288.15 million ha of forest, 7.1% of the global forest area was PEFC-certified. FSC reported almost 196.69 million ha of certified forest, representing 4.9% of the global forest area (Table 5).

However, both standards experienced a strong decrease in certified area in 2021–22 (-12.3% for PEFC and -14.7% for FSC). The drop was due to the suspension of certificates in Russia and Belarus in connection with the war in the region. Due to the decrease in 2022, both standards also experienced a decline in certified area in 2018–22 (-6.9% for PEFC and -0.2% for FSC) (Table 5).

Number of chain-of-custody certificate holders

FSC counted 52,827 chain-of-custody (CoC) certificate holders in 2022, and PEFC 12,385 (Table 5).

Table 5: Certified forest area and CoC certificate holders by forestry standard, 2022

Standard	Area certified [ha]	CoC certificate holders [no.]	Share of global forest area	Area growth 2021–22	Area growth 2018–22
FSC	196,691,587	52,827	4.9%	-14.7%	-0.2%
PEFC	288,154,245	12,385	7.1%	-12.3%	-6.9%

Sources: FiBL-ITC-IISD/SSI survey, 2024: FSC-PEFC, 2024.

Single-sector standards dominate

Standards that directly target mainstream adoption within a specific sector largely drive growth and market uptake. In the sectors discussed, where single-commodity standards[14] have been developed (coffee, cotton, forestry, oil palm, sugarcane and soy), these standards usually are the ones with the biggest area for their specific crops.

In 2022, Better Cotton and CmiA had the biggest certified cotton area (global share of cotton of 13.8% and 5.5%, respectively), RSPO the largest certified oil palm area (12.4% of total oil palm area), RTRS the biggest certified soybean area (1.6% of total soybean area) and Bonsucro the largest sugarcane area (9% of total sugarcane area). Only the coffee area certified by the single-commodity standard 4C fell short of the coffee area certified by Fairtrade International and Rainforest Alliance (Table 6).

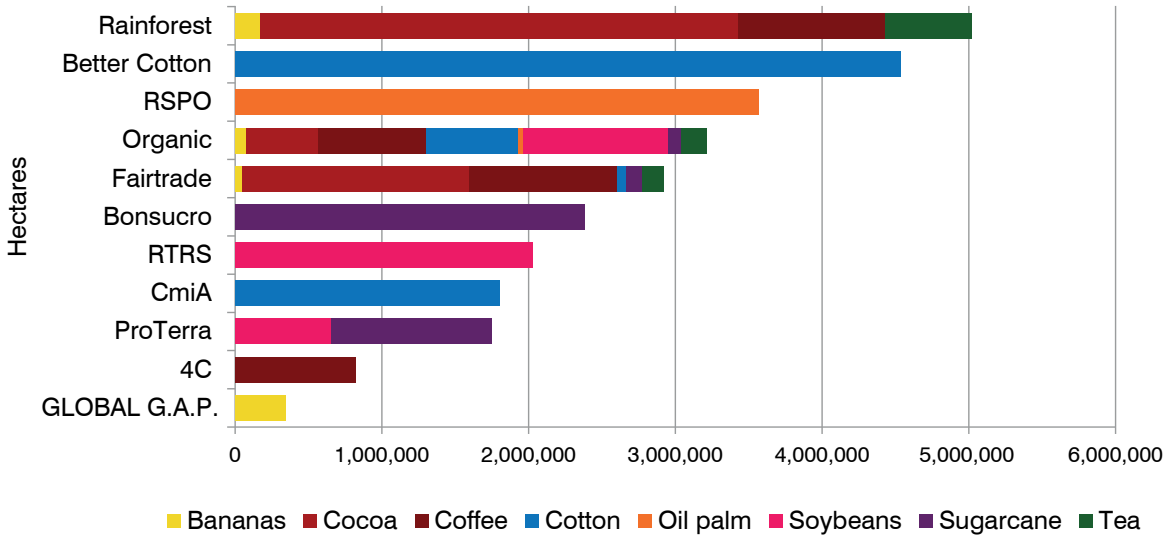
Multiple-commodity standards[15] such as Fairtrade, GLOBALG.A.P., organic, ProTerra and Rainforest Alliance may have lower coverage of a specific commodity than single-commodity standards because of their wider scope. This is most notable for organic agriculture. In 2022, organic certified 3.2 million hectares for the eight agricultural products analysed in this report, but more than 96.6 million hectares in total, covering more or less all agricultural commodities (Table 6).

However, multiple-commodity standards are gaining importance – in the coffee sector, and in the sugarcane and cotton sectors. Fairtrade, Rainforest Alliance and organic all certified a substantial share of the global coffee area in 2021 (9%, 9% and 6.5%, respectively). ProTerra Foundation certified an important portion of the global sugarcane area (4%) and organic certified 1.9% of the global cotton area (Table 6).

No single-commodity standards have been developed in the tea and cocoa sectors. Rainforest Alliance became the most important standard in the cocoa sector (global cocoa area share of 28%) after merging with UTZ and remained the most important standard in the tea sector (global tea area share of 11%) (Table 6).

14. Single-commodity standards are sustainability standards that certify just one commodity. An example is RSPO, which only certifies oil palm.
15. Multiple-commodity standards are sustainability standards that certify multiple commodities. An example is Fairtrade International, which certifies a wide variety of commodities.

Figure 6: Area harvested by agricultural standard and commodity, 2022



Note: This figure shows the area certified by VSSs for the eight selected agricultural commodities.

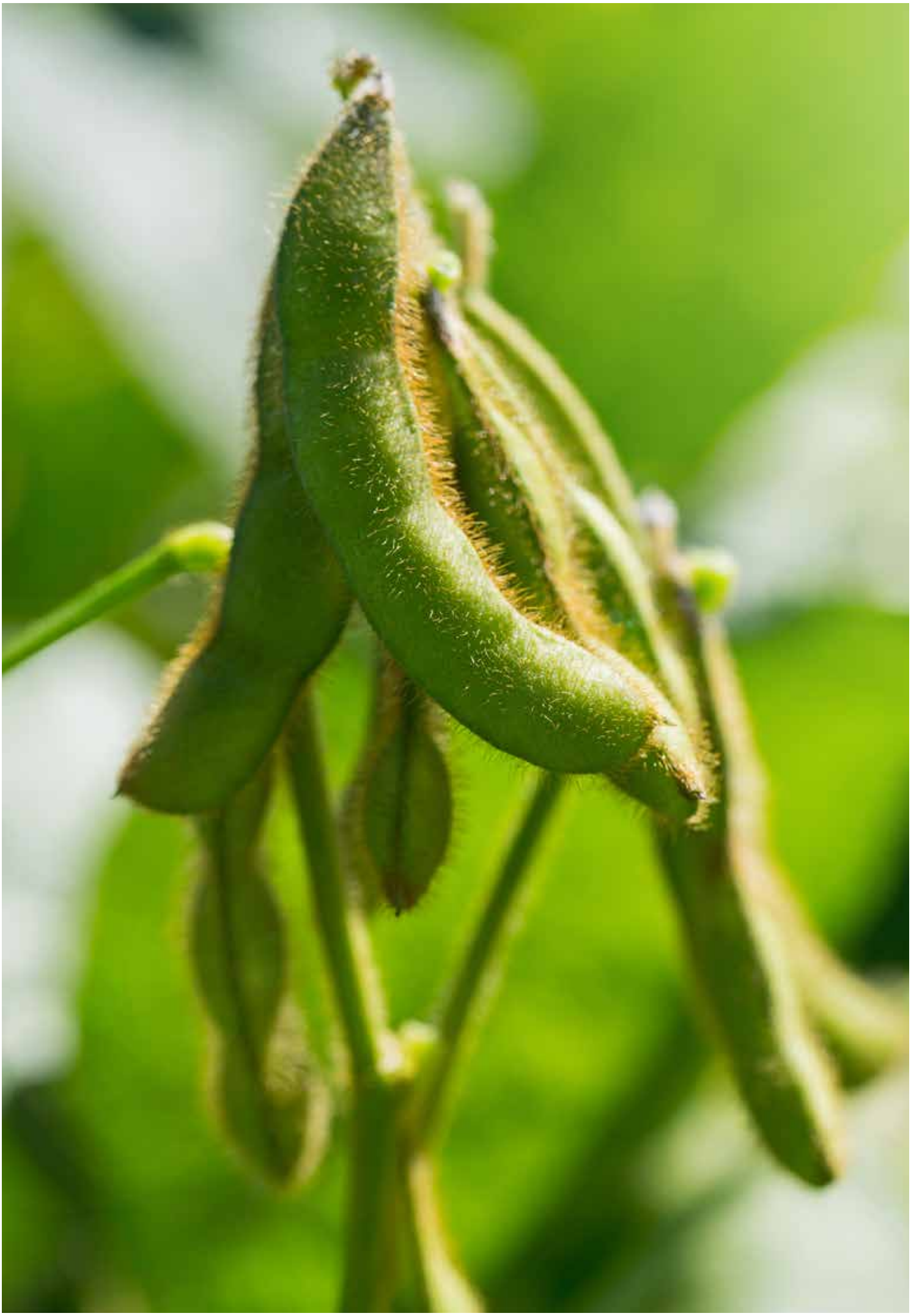
Sources: FiBL-ITC-IISD/SSI survey, 2024: 4C Services, 2024; Better Cotton, 2024; Bonsucro, 2024; Cotton made in Africa, 2024; Fairtrade International, 2024; GLOBALG.A.P., 2024; FiBL survey, 2024; ProTerra Foundation, 2024; Rainforest Alliance, 2024; Roundtable on Sustainable Palm Oil, 2024; Round Table on Responsible Soy, 2024; Textile Exchange 2024.

Table 6: Area harvested by agricultural standard and commodity in 2022

Standard	Commodity	Area harvested [ha]	Share of global area harvested	Area growth 2021–22	Area growth 2018–22
4C	Coffee	831,900	7.3%	5.0%	-37.4%
4C total		***831,900***	***7.3%***	***5.0%***	***-37.4%***
Better Cotton	Cotton	4,548,909	13.8%	-5.4%	9.2%
Better Cotton total		***4,548,909***	***13.8%***	***-5.4%***	***9.2%***
Bonsucro	Sugarcane	2,379,399	9.0%	27.8%	110.8%
Bonsucro total		***2,379,399***	***9.0%***	***27.8%***	***110.8%***
CmiA	Cotton	1,824,743	5.5%	7.0%	2.5%
CmiA total		***1,824,743***	***5.5%***	***7.0%***	***2.5%***
Fairtrade	Bananas	50,347	0.9%	0.6%	22.4%
	Cocoa	1,538,331	13.2%	1.0%	30.5%
	Coffee	1,019,160	9.0%	-11.6%	6.0%
	Cotton	71,897	0.2%	26.1%	29.5%
	Sugarcane	108,765	0.4%	-4.1%	-27.4%
	Tea	137,432	2.6%	17.8%	0.7%
Fairtrade total		***2,925,932***	***3.2%***	***-2.9%***	***16.0%***
GLOBALG.A.P.	Bananas	342,930	6.5%	-0.6%	14.7%
GLOBALG.A.P. total		***342,930***	***6.5%***	***-0.6%***	***14.7%***

Standard	Commodity	Area harvested [ha]	Share of global area harvested	Area growth 2021–22	Area growth 2018–22
Organic	Bananas	84,249	1.6%	-13.5%	13.9%
	Cocoa	486,879	4.2%	13.0%	53.0%
	Coffee	733,835	6.5%	-8.0%	4.6%
	Cotton	621,691	1.9%	0.0%	74.6%
	Oil palm	44,120	0.2%	36.4%	416.0%
	Soybeans	979,117	0.8%	-1.3%	52.0%
	Sugarcane	105,844	0.4%	-1.0%	-1.4%
	Tea	166,501	3.2%	19.2%	58.1%
Organic total		***3,222,236***	***1.3%***	***0.1%***	***39.2%***
ProTerra	Soybeans	664,700	0.5%	5.0%	-38.0%
	Sugarcane	1,087,904	4.1%	15.7%	-3.7%
ProTerra total		***1,752,604***	***1.1%***	***11.4%***	***-20.4%***
Rainforest	Bananas	164,573	3.1%	-11.2%	-1.1%
	Cocoa	3,265,560	28.0%	531.1%	351.4%
	Coffee	1,013,944	8.9%	73.9%	115.4%
	Tea	578,566	11.0%	-16.6%	-2.5%
	Tea	613,582	12.08%	3.39%	29.86%
Rainforest total		***5,022,643***	***15.0%***	***137.7%***	***145.6%***
RSPO	Oil palm	3,569,324	12.3%	6.4%	27.1%
RSPO total		***3,569,324***	***12.3%***	***6.4%***	***27.1%***
RTRS	Soybeans	2,028,070	1.6%	52.3%	60.5%
RTRS total		***2,028,070***	***1.6%***	***52.3%***	***60.5%***

Sources: FiBL-ITC-IISD/SSI survey, 2024: 4C Services, 2014–16, 2018–24; Better Cotton, 2014, 2015, 2017–24; Bonsucro, 2014–16, 2018–24; Cotton made in Africa, 2014–16, 2018–24; Fairtrade International, 2017– 24; GLOBALG.A.P., 2015, 2016, 2018–24; FiBL survey, 2008–24; ProTerra Foundation, 2014–16, 2018–24; Rainforest Alliance, 2014–16, 2018–24; Roundtable on Sustainable Palm Oil, 2019–24; Round Table on Responsible Soy, 2014–16 , 2018–24; Textile Exchange 2013–24.



CHAPTER 3

CONSUMPTION TRENDS FOR CERTIFIED PRODUCTS

By Erika Luna and Steffany Bermúdez

CONSUMPTION TRENDS FOR CERTIFIED PRODUCTS

The consumption of more sustainable commodities following the COVID-19 pandemic is driven by increased awareness among consumers and industry actors about ethical products, along with strengthened value-chain collaboration and policy actions designed to address the negative social and environmental impacts of conventional production in some agricultural sectors.

Europe and North America continue to lead sustainable consumption across the eight agricultural commodities examined in this report. Some data show growing interest in sustainable products in emerging markets and producing countries.

In the coffee, cocoa, tea and cotton sectors, sustainable consumption shows promise in both traditional and emerging markets. In others, such as soybeans and sugarcane, further efforts are needed to drive demand. Moving forward, the expansion of VSS-compliant consumption in emerging markets, particularly in Asia, is critical for the long-term sustainable growth of many of these industries.

Greater consumer awareness about the benefits of sustainable products is needed to boost consumption across all sectors, along with stronger commitments to sustainable sourcing from buyers, processors and traders. Coordinated efforts between governments and value-chain actors are also essential to make VSS-compliant goods more accessible and affordable in emerging markets and producing countries. This is vital to ensure the growth of industries that provide livelihoods to millions of producers worldwide.

Bananas

Europe and North America remained the world's top consumers of bananas in 2023, accounting for 41% and 25% of total consumption, respectively.

These two regional markets also consume the most VSS-compliant bananas, driven by the nutritional benefits and the affordability of bananas compared to other fruit (United Nations Food and Agricultural Organization [FAO], 2023).

Banana consumption in European countries including the Netherlands, Belgium and Germany grew 10% in 2023 from 2022 (FAO, 2023). The Netherlands and Germany also reported the highest consumption of Fairtrade-certified bananas in the region in 2022 (CBI, 2023).

In North America, the United States is driving growth in the organic banana market, which is expected to grow at a CAGR of 11% in 2024–29. This positions the country as the biggest global consumer of organic bananas. In 2022–23 alone, organic banana consumption in the United States, primarily sourced from Ecuador, grew by 10% (FAO, 2023).

Fairtrade-compliant bananas have also gained visibility in the US market, where consumer recognition of the Fairtrade label increased from 23% in 2021 to 27% in 2023. Despite rising living costs since the pandemic, US consumers have shown a greater willingness to pay a premium for Fairtrade bananas, motivated by growing awareness of sustainability challenges such as poverty and poor labour conditions in conventional banana supply chains (Fairtrade America, 2023).

The robust performance of the organic banana market reflects a positive trend, with significant growth potential in traditional markets in Europe and North America. Boosting consumption of VSS-compliant bananas in growing markets in Asia – especially in countries such as China, the Russian Federation and Japan, which account for an important share of banana imports – is critical for the industry's sustainable growth (Fresh Plaza, 2024; FAO, 2023).

To achieve this, value-chain actors – including retailers, importers and distributors in both traditional and emerging markets – must learn more about the social and environmental benefits of buying and marketing more sustainable bananas.

Cocoa

Various factors are driving the global movement towards sustainable cocoa consumption, including corporate initiatives, strong regulatory frameworks in major consuming nations and increasing consumer demand.

As of 2024, the global organic cocoa market is valued at about $705.4 million, with projections indicating a growth rate of 7.67% CAGR through 2032 (Fortune Business Insights, 2024).

In the Global North, there is a strong focus on transparency, ethical sourcing and rising demand for specialty cocoa and cocoa-based products (CBI, 2024). This emphasis stems from informed consumer choices and stringent regulations aimed at promoting sustainable practices in the sector.

The United States, the Netherlands and Germany are among the countries leading demand for organic cocoa (Future Market Insights, 2024). Sales volumes of Fairtrade cocoa and cocoa-based products in the United States grew by 11% in 2020–21 (Fairtrade America, 2022). In Canada, Fairtrade cocoa volumes grew 13% in 2022-23 (Fairtrade Canada, 2023).

Europe is the world's top consumer market for cocoa products, accounting for 41.2% of global consumption (Fortune Business Insights, 2024). Demand for premium chocolate in Europe is forecast to grow by an annual average of 8.7% in 2023–28 (CBI, 2024).

In addition, legislation such as the EU Regulation on Deforestation-free Products – which requires that companies doing business in the European Union ensure that commodities such as cocoa imported in the bloc was produced in conditions that respect environmental laws, land use rights and was farmed on non-deforested land after 2020 – is expected to greatly influence the sustainability of cocoa supply chains and, therefore, boost consumption of more sustainable cocoa (IDH, 2022; PricewaterhouseCoopers, 2024).

In the Asia-Pacific region, especially China, 53% of consumers express a willingness to pay a premium for confectionery that offers rich textures, such as organic bean-to-bar chocolate (Mintel, 2024). Additionally, smaller-sized chocolate products are becoming more popular, aligning with trends towards portion control and affordability (Mintel, 2024). This indicates a diverse and evolving market landscape for cocoa consumption worldwide.

Despite growing demand for more sustainable chocolate products in Europe, the market share of VSS-compliant cocoa globally still has room to expand. This indicates a need for policymakers and value-chain actors operating in other key consuming regions to advocate for greater sustainability in cocoa value chains. To achieve this, investments should focus on making VSS-compliant cocoa accessible to a wider range of consumers, at different price levels.

Coffee

Coffee consumption has seen a significant resurgence worldwide since the COVID-19 pandemic, with projections indicating a growth rate of 2.2% from 2023 to 2024 (International Coffee Organization, 2023). This increase is largely driven by non-producing countries – especially in North America – that have become key players in the coffee sector.

At the same time, there has been a major shift towards sustainable coffee, fuelled by growing consumer awareness and a heightened preference globally for ethical products. This shift has led to a 9% increase in sustainable coffee purchases across North America and Europe (Visionary Venture Research, 2024).

Campaigns by non-governmental organizations, coffee roasters and traders, standard-setting organizations and multistakeholder platforms have effectively highlighted the adverse socioeconomic impacts of conventional coffee farming practices. This has prompted value-chain actors to source more sustainable coffee and consumers to seek out more responsibly sourced options.

Europe is the largest global market for VSS-compliant coffee. Demand has grown in recent years, as certification is seen as a proof of commitment to sustainability in the sector (Centre for the Promotion of Imports from developing countries [CBI], 2021).

The global market for organic coffee was worth $133 billion in 2021, with North America, Germany and France leading demand (Intelligence Coffee, 2024). The organic coffee sector is expected to continue growing, with projections suggesting a growth rate of about 7.5% in 2024–30 (Agarwal, 2023). Purchases of 4C certified coffee reached a record in 2023, with sales growth averaging 9.8% in 2020–23 (4C Services, 2024).

Emerging economies are joining this trend. For instance, consumption of sustainable coffee in India rose a remarkable 12% in 2020–22, reflecting growing recognition of the importance of sustainability in the domestic coffee market (Consumer Understanding of Sustainability, 2022). In Brazil, Gen Z coffee consumers are leading the shift towards specialty brews, flavoured coffees, sustainable and out-of-home options. Brazil's coffee market is estimated to expand by 15% a year over four years , 2024-2028(Charles, 2024).

Growing demand for sustainable coffee underscores a broader global movement towards more responsible and ethical consumption practices.

Still, the market for VSS-compliant coffee is showing signs of stagnation in traditional markets (CBI, 2021). This signals the need for targeted efforts to boost sustainable coffee consumption in producing countries and emerging economies, where per capita consumption remains lower than in Europe and North America (Perfect Daily Grind, 2020). This means investing in campaigns that promote sustainable coffee in domestic markets, while making it more affordable and accessible.

Cotton

Consumption of VSS-compliant cotton has increased despite disruptions in global supply chains following the COVID-19 pandemic.

Global demand for organic cotton is growing and outstripping supply, consumption is estimated to grow by 84% in 2020-2030 (Universalia, 2022; Textile Exchange, 2021). Cotton certified by the Better Cotton Initiative increased by 12% in 2022–23 (BCI, 2023). The world's cotton market is expected to expand by a CAGR of 40% in 2024-32 (Fortune Business Insights, 2024).

In the aftermath of the pandemic, consumers in North America and Europe are buying more sustainably sourced cotton products. A 2021 survey predicted that global demand for organic cotton would climb 84% by 2030 compared to 2020 (Textile Exchange, 2021).

Several factors will fuel this rise: commitments from major apparel brands and retailers to use more sustainable materials, suppliers and manufacturers, as well as initiatives and platforms such as the Textile Exchange and the Organic Cotton Accelerator, which advocate for more transparent and responsible cotton value chains (Organic Cotton Accelerator, 2022; BCI, 2023).

The VSS-compliant cotton market has gained significant traction in recent years, largely due to consumer concerns about the environment and the desire for healthier, more sustainable products. Better Cotton represented around 22% of global cotton production in 2023 (BCI, 2023). Organic cotton, grown without insecticides or pesticides, has fuelled demand in industries such as medical, apparel and personal care products, covering around 1.4% of global production in 2021 (CBI, 2022; Textile Exchange, 2022).

The Asia-Pacific region, which consumes 90% of the world's cotton fibre (US Department of Agriculture, 2024), is also moving towards sustainable cotton consumption. The market for organic cotton in the region will grow at an annual rate of 10% through 2025, driven by rising consumer interest in sustainable fashion and government initiatives promoting organic agriculture (Organic Cotton Market Forecast, 2023).

Greater commitment from value-chain actors to increase and maintain purchases of VSS-compliant cotton, and to set goals for transitioning to more sustainable cotton, are key to promote sustainable consumption, especially in the Asia-Pacific region.

Palm oil

Palm oil is the most popular vegetable oil in the world, accounting for about 41% of vegetable oil consumption, followed by soybeans and mustard oil (World Wildlife Fund, 2024).

Despite the growing importance of sustainability standards in the sector, such as the Roundtable on Sustainable Palm Oil, only around 8% of global palm oil production is RSPO-certified (RSPO, 2023). This highlights an opportunity for expansion in sustainable consumption of palm oil and its derivatives, particularly in major producing and consuming countries in Asia-Pacific.

Europe is the top consumer of VSS-compliant palm oil, using 45% of all certified sustainable palm oil (RSPO, 2022). About 86% of the palm oil imported into Europe is produced under a VSS. This is driven by strong advocacy efforts, regulations against the use of palm oil linked to deforestation and corporate sourcing commitments from traders and processors (IDH, 2022a). The growth of certified sustainable palm oil in Europe demonstrates the successful integration of sustainability into mainstream consumer products (IDH, 2022a).

In major palm oil-consuming countries such as India, however, sustainable consumption is virtually nonexistent (IDH, 2022b). This underscores the need for governments in these countries to set national or regional targets for sustainable palm oil use, encourage local industries to improve buyers' practices and make sustainable palm oil options more affordable and accessible to consumers.

Soybeans

Major gaps still exist in data on the consumption of both conventional and VSS-compliant soybeans in the post-COVID-19 landscape.

In Europe, the market is largely concentrated in Switzerland, Germany, France and Italy, where organic soybeans are the most traded and consumed product in the 'grains, pulses and oilseeds' category (CBI, 2024). VSS-compliant soybeans are mostly used in the food, grain processing and aquaculture industries (RTRS, 2023).

Despite an overall 5.1% decline in imports of organic products to Europe, organic soybeans bucked this trend with a remarkable increase of 51% in 2022, mostly from Togo and Ukraine (CBI, 2024; European Union, 2023). That made organic soybeans the fourth most-traded commodity in the region, capturing 7% of the organic market share in 2022, after organic fruit, coffee and oilcakes (European Union, 2023).

Global consumption of RTRS-compliant soy also grew by 7% in 2022 from 2021, with 81% of the global uptake in Europe, mostly through the purchase of RTRS credits via the standard's trading platform[16] (RTRS, 2023). In 2017, the European Union consumed around 7.6 million tons of VSS-compliant soybeans – certified by the European Feed Manufacturers' Federation's Soy Sourcing Guidelines – accounting for 22% of its total soybean consumption (European Union, 2023). However, only 13% of this was deemed deforestation-free (IDH, 2019).

Civil society organizations, sectoral initiatives and government support are largely behind the growing demand for VSS-compliant soybeans in Europe (RTRS, 2023). Yet not all countries are embracing this demand; Portugal, Italy and Spain are still lagging behind in boosting sustainable consumption, despite their high soybean usage (IDH, 2019).

Furthermore, as demand for VSS-compliant soybeans remains lower than supply (IDH, 2019), many producers are forced to sell their soybeans as conventional. Given the considerable costs and efforts required to achieve and maintain certification, this situation poses a financial challenge for farmers.

Going forward, collaborative action from industry actors (particularly traders and processors) – along with greater efforts from supply-chain actors to reinforce and commit to purchasing more VSS-compliant soybeans – is needed. Support from governments in both producing and consuming countries is also key to bolster VSS initiatives in the sector and expand global demand for more sustainable soybeans.

Sugarcane

VSS-compliant sugarcane remains a niche market.

Bonsucro, the leading sustainability standard in the sector, represented around 6.5% of total sugarcane production in 2022, and Fairtrade-certified sugarcane accounted for just 1% of global production (Bonsucro, 2022; Fairtrade Foundation, 2024). Still, the market for sustainable sugarcane is showing signs of growth. The global trade of Bonsucro-certified sugar climbed by 51% in 2021–22, reflecting rising demand for VSS-compliant sugar (Bonsucro, 2022).

The value of the organic cane sugar market is projected to grow from $8.8 billion in 2024 to $13.8 billion by 2034. Global sales of organic cane sugar are expected to increase at a CAGR of 4.6% in this period (Future Markets Insights, 2024).

In the Global North, the expansion of the food and beverage industry is underpinning greater consumption of sustainable sugarcane (Future Markets Insights, 2024). Governments and regulators in Europe are also adopting policies that promote demand for more sustainable sugarcane. The European Union's Renewable Energy Directive (2023) set a target for member states to produce 42% of their energy from renewable sources by 2030, which includes biofuels derived from sugarcane (Bonsucro, 2022; European Commission, 2023).

In emerging economies such as India and China, organic sugar consumption is expected to grow at a CAGR of 5.6% and 3.8%, respectively, in 2024–34, largely due to growing consumer interest in organic and natural products (Future Markets Insights, 2024). Demand for sweeteners in the bakery and beverage industries is also on the rise, aided by India's economic growth (Future Markets Insights, 2024).

16. RTRS has a platform for buyers to purchase credits that represent one tonne of sustainable soybean. Most of Europe's consumption of RTRS soybean is through credits and one part through physical and direct transactions.

Still, it is important to tackle the barriers that hinder expansion of the sustainable sugarcane market. Raising awareness about the environmental and social benefits of sustainable sugar among producers and consumers is crucial. Educational campaigns targeting value-chain actors – such as processors and manufacturers – in major producing and consuming countries to favour purchases of VSS-compliant sugar are essential. Moving forward, the growing market for sugarcane derivatives such as molasses, ethanol and biofuels has the potential to drive more sustainable consumption in the sector in the coming years.

Tea

The global organic tea market is poised for remarkable growth.

The market is anticipated to expand at a compound annual growth rate (CAGR) of 11.6% in 2018–30, and this growth is expected to double the market value from $825 million in 2022 to $1.7 billion by 2028 (Fairfield, 2023).

Consumer lifestyles have changed since the pandemic, reflecting a broader shift towards sustainable consumption in the market for hot beverages, including tea. Consumers increasingly want products that are cultivated without harmful chemicals, have health benefits and are available in diverse flavours (Euromonitor International, 2022).

Rising health consciousness among consumers, growing awareness of the benefits of organic products and greater availability of organic tea through multiple retail channels support the market's growth. Demand for organic tea is on the rise in North America (United States and Canada), with projections suggesting that sales will grow at a CAGR of 6.6% from 2021–26, capturing around 20% of the global market share for organic tea by 2026 (Government of Canada, 2023).

Europe is also a strong player in the organic tea market. The major consumers of organic tea in the region, including France, the United Kingdom, Germany, the Netherlands and Italy, collectively accounted for 75.4% of total organic tea retail value sales in Europe in 2021 and are expected to lead growth sales at a CAGR of 8.4% in 2021–26, reaching retail sales of about 1.3 billion by 2026 (Government of Canada, 2022). Stringent regulations on food safety and a health-oriented consumer base support growth in Europe. This is reinforced by the European Union's Organic Regulation, which aims to promote consumption of organic products in the region (AGRINFO, 2023).

With respect to producing countries, China accounted for 70% of the world's organic tea production in 2020, highlighting not only its formidable production capabilities, but also increasing domestic demand (Zhen et al., 2023). India has also seen the expansion of Trustea certification. As of 2023, 70% of the country's tea production was compliant with the standard, which is also being used by the largest Indian tea retailers in some of their local brands (Trustea, 2023). This trend underscores both countries' pivotal role in advancing sustainable consumption practices within the global tea industry.

The growth of VSS-compliant tea uptake in recent years shows an impressive trend towards sustainable consumption. There is more to do, however, as VSS-compliant tea is mostly exported and not consumed in producing countries (Rainforest Alliance, 2021). In many domestic markets in Asia, buyers still prefer conventional tea, which highlights the need to incentivize local processors and retailers to adopt and promote teas grown under more sustainable practices in their brands.

CHAPTER 4

MEETING THE SUSTAINABILITY STANDARDS

www.4C-services.org

4C

4C (Common Code for the Coffee Community) was launched in 2003 to promote sustainable global coffee production that respects people and the environment. Through its strict Code of Conduct, comprising 12 principles and 45 criteria, it helps protect landscapes with high biodiversity and carbon values, safeguard natural resources and promote good working conditions along the supply chain.

The 4C Code covers the three pillars of sustainability (economic, social and environmental) in a balanced approach. Advanced and innovative tools support the auditing procedure, for example, satellite imagery-based remote-sensing technology to support the risk assessment and verification of deforestation-free supply chains.

In 2022, 4C-certified land accounted for more than 830,000 hectares of coffee crops worldwide, representing 0.02% of global agricultural land and 7.3% of the global coffee area. Upwards of 307,000 certified producers – including almost 290,000 smallholders – produced nearly 1.7 million tons of coffee. Colombia had the largest area (207,442 ha), followed by Brazil (205,771 ha), Viet Nam (165,200 ha) and Côte d'Ivoire (54,395 ha). 4C's certified area decreased by more than 37% between 2018 and 2022 after implementing more rigorous certification procedures, but grew by 5% again in 2021–22.

4C: Key indicators, 2022	
Area [hectares]	831,900
4C share of global agricultural land	0.02%
4C share of global coffee area	7.3%
Coffee production volume [MT]	1,696,519
Certificate holders	191
Producers	307,590
Smallholders	289,189

Source: 4C, 2024.

BETTER COTTON

Better Cotton is a global not-for-profit organization supporting the production of more equitable and sustainable cotton at the farm level. Better Cotton exists to catalyse the cotton farming community with partners, governments and others to continuously drive positive impact. It does so by setting standards and facilitating the supply and demand of more sustainable cotton from farm to brand. In just 15 years, it has aligned more than a fifth of the world's cotton with its standard and helped farmers and farming communities thrive.

For the 2022/23 season,[17] Better Cotton was grown on more than 4.5 million hectares worldwide, representing 0.1% of global agricultural land and 14% of the global cotton area. More than 1.5 million farmers produced upwards of 5 million tons of Better Cotton. India harvested the largest area, followed by Brazil (more than 1.3 million ha each) and then Pakistan (almost 670,000 ha). Better Cotton's global cotton area increased by more than 9% between 2018 and 2022 and decreased by more than 5% in 2021–22.

Better Cotton: Key indicators, 2022/23 season	
Area [hectares]	4,548,909
Better Cotton share of global agricultural land	0.1%
Better Cotton share of global cotton area	13.8%
Production volume [cotton lint, tons]	5,028,123
Certificate holders	1,322
Licensed producers	1,518,863
Smallholders	1,514,040
Producer groups	407

Source: Better Cotton, 2024.

17. Figures reported here do not include BCI–CmiA benchmarked figures, which are reported separately. For full figures, see Better Cotton's annual report at https://bettercotton.org/who-we-are/annual-report/.)

www.bonsucro.com

BONSUCRO

Bonsucro sets standards for sustainable sugarcane production. The non-profit organization has a community of more than 300 members, from farms, mills and non-governmental organizations to traders, retailers and end-users. Bonsucro seeks to collectively accelerate the sustainable production and uses of sugarcane. Its strategic aims are to create value across the supply chain, improve the environmental impact of sugarcane and strengthen human rights and decent work in sugarcane farming and milling.

Launched in 2011, Bonsucro's process is guided by the Production Standard and the Chain-of-Custody Standard, to effect industry-wide change. Members can also access impact projects on key issues such as implementing the standard, collaborating with policymakers on sustainability, assisting smallholder farmers and collaborating with partner institutions to better understand sustainability issues in sugarcane supply chains.

Bonsucro certified more than 2.3 million hectares of sugarcane in 2022, representing 0.05% of global agricultural land and 9% of the global sugarcane area. In 2022, 159 certified producers grew almost 137 million tons of sugarcane. Brazil had the largest area (2 million ha), followed by Thailand (more than 66,000 ha) and Australia (more than 41,000 ha). Bonsucro's total certified area more than doubled between 2018 and 2022 and grew by almost 28% in 2021–22.

Bonsucro: Key indicators, 2022	
Area [hectares]	2,379,399
Bonsucro share of global agricultural land	0.05%
Bonsucro share of global sugarcane area	9%
Production volume [MT]	136,916,406
Certificate holders	242
Producers	159

Source: Bonsucro, 2024.

www.cottonmadeinafrica.org/en

COTTON MADE IN AFRICA

COTTON MADE IN AFRICA

Founded in 2005, Cotton made in Africa – an initiative of the Aid by Trade Foundation – supports small-scale African cotton farmers to improve their lives through trade. In 2022, more than 40% of all African cotton[18] was grown in accordance with the CmiA standard, with around €4.5 million ($4.1 million) in licence revenues – an increase of about 15% in 2021–22. Income from licensing fees is reinvested to benefit farmers and the environment.

The CmiA programme encompassed 10 countries and worked with more than 900,000 smallholder cotton farmers in 2022. More than 1.8 million hectares were CmiA-certified that year, representing 0.04% of global agricultural land and 0.16% of the African agricultural area. CmiA's share of the total cotton areas is considerably higher, at 5.5% globally.

Burkina Faso had the largest area (550,635 ha), followed by Côte d'Ivoire (474,576 ha) and Chad (294,427 ha). The CmiA-certified area grew by more than 2% from 2018–22, with a 7% increase in 2021–22.

CmiA: Key indicators, 2022	
Area [hectares]	1,824,743
CmiA share of global agricultural land	0.04%
CmiA share of global cotton area	5.5%
Production volume [cotton lint, tons]	716,397
Certificate holders	19
Smallholders	901,798

Source: CmiA, 2024.

18. Based on data from FAOSTAT.

www.fairtrade.net

FAIRTRADE INTERNATIONAL

FAIRTRADE INTERNATIONAL

The global Fairtrade International network ensures an equal share of trade benefits for farmers and workers in 68 countries through standards and certification, focused programmes and advocacy. Standards encompass social, economic and environmental requirements for smallholder farmers, traders and plantations using hired labour, and they guarantee a minimum price and premium on most goods for producers.

More than 3 million hectares were Fairtrade-certified in 2022, representing 0.06% of global agricultural land. Fairtrade International certifies a wide range of commodities, from tropical fruit to cereals and textiles. Cocoa accounted for almost half of Fairtrade International's total area, exceeding 1.5 million hectares – 13% of the global cocoa area. Coffee was the second most important product at more than 1 million hectares, representing 9% of the global coffee area.

Fairtrade International has certified more than 1.8 million farmers, mainly in Africa (72%), followed by Latin America (15%) and Asia (12%). The Fairtrade-certified area expanded by 16% between 2018 and 2022 but decreased by 2.5% in 2021–22.

Fairtrade: Key indicators, 2022	
Area [hectares][19]	3,080,519
Fairtrade share of global agricultural land	0.06%
Fairtrade share of global cocoa area	13.2%
Fairtrade share of global coffee area	9%
Production [MT][20]	4,848,541
Producers[21]	1,848,268

Source: Fairtrade International, 2024.

19. This excludes honey, nuts, pulp, gold and sports balls.
20. This excludes gold, flowers and sports balls.
21. This does not include workers in hired labour workplaces.

www.fsc.org

FOREST STEWARDSHIP COUNCIL

The Forest Stewardship Council is a member-based initiative with certificates operating in 135 countries. Its core Principles and Criteria Standard articulates the requirements for forest-management certification, which aims to protect the environmental and social values of managed forests, including protection of areas of high conservation value and the rights of Indigenous peoples. To display the FSC Mix label (the initiative's most common label), material used for products must comprise at least 70% certified material; the remainder can be FSC-controlled wood or recycled material.

More than 196 million hectares of forest were FSC-certified in 2022, representing 5% of the global forest area. Canada had the largest area, with more than 44 million hectares, followed by the Russian Federation (more than 42 million hectares) and Sweden (more than 19 million hectares). Together, these three countries represented more than half of the global FSC-certified area. There were upwards of 52,000 chain-of-custody certificate holders. The certified area remained stagnant between 2018 and 2022 and shrunk by more than 14% in 2021–22.

FSC: Key indicators, 2022	
Area [hectares]	196,691,587
FSC share of global forestry area	4.9%
Chain-of-custody certificate holders	52,827

Source: FSC, 2024

www.globalgap.org

GLOBALG.A.P.

GLOBALG.A.P.

GLOBALG.A.P. is a brand of smart farm assurance solutions developed by FoodPLUS GmbH in Cologne, Germany, with cooperation from producers, retailers and other stakeholders from across the food industry. These solutions include a range of standards for safe, socially and environmentally responsible farming practices.

The most widely used GLOBALG.A.P. standard is Integrated Farm Assurance, applicable to fruit and vegetables, aquaculture, flowers and ornamentals, livestock and more. This standard also forms the basis for the GGN label – the consumer label for certified, responsible farming and transparency.

In 2022, more than 4.5 million hectares of agricultural land were under GLOBALG.A.P. certification,[22] managed by more than 192,000 agricultural producers.[23] The product with the largest noncovered area was potatoes, followed by bananas and apples.

Most of the area under GLOBALG.A.P. certification (both covered and noncovered) is in Europe (42%), followed by Latin America (25%), Africa (12%), North America (11%), Asia (8%) and Oceania (2%). Spain has the largest area under certification (more than 504,000 hectares), followed by the United States (more than 483,000 hectares) and Italy (more than 257,000 hectares).

The total area under GLOBALG.A.P. certification increased by 17% in 2018–22 and by 1.9% in 2021–2022. Production processes for 384 fruit and vegetable products are certified to the Integrated Farm Assurance standard worldwide.

GLOBALG.A.P.: Key indicators, 2022	
Area (hectares)	4,506,825
Share of global agricultural land under GLOBALG.A.P. certification	0.09%
Certificate holders	59,496
Producers under certification	192,062

Source: GLOBALG.A.P. c/o FoodPLUS GmbH, 2024.

22. This includes more than 172,000 hectares covered by greenhouses and plastic tunnels for intensive production.
23. The number of producers includes crop producers only, and excludes livestock and aquaculture producers.

www.ifoam.bio/

IFOAM - ORGANICS INTERNATIONAL

Organic agriculture is a farming system that emphasizes the use of natural processes and inputs, aiming to produce food in a sustainable and environmentally friendly manner. Organic farming is practiced in 188 countries. It is regulated through a set of laws, standards and certification processes to ensure that products labelled as organic meet specific criteria. IFOAM – Organics International acts as the global umbrella for organic organizations.

The global membership-based organization represents the organic movement across the entire food system, with upwards of 781 affiliates. IFOAM – Organics International celebrated its 50th anniversary in 2022.

Of the standards presented in this report, organic applies to the widest range of commodities. Almost all agricultural product types are certified. In addition to the agricultural land, there are wild collection, aquaculture and forestry products. These sectors accounted for 34.6 million hectares in 2022.

In 2022, 96.6 million hectares were certified organic worldwide, representing 2% of all agricultural land. Furthermore, almost 4.5 million producers practiced organic farming; most were certified through group certification. Australia had the largest organic area at 53 million hectares, followed by India (4.7 million hectares) and Argentina (4.1 million hectares).

The global organic market was worth €134.8 billion ($142.7 billion) in 2022, and the leading countries were the United States, Germany and France.

Where a country's production volume data were not available, FiBL estimated the area harvested and the production volume. If available, the fully converted area or 90% of the certified area was taken as the area harvested. FiBL calculated the production volume by using estimated yields based on country yields provided by the United Nations Food and Agriculture Organization's (FAO) corporate statistical database (FAOSTAT), assuming that organic has a lower yield in most cases.

For organic cotton, data from Textile Exchange were used.[24]

IFOAM – Organics International: Key indicators, 2022	
Area [hectares][25]	96,610,720
Organic share of global agricultural land	2%
Producers	4,502,778
Retail sales [million EUR]	134,760

Source: FiBL,[26] 2024; Textile Exchange, 2024 (for organic cotton data). More information at https://www.organic-world.net/yearbook/yearbook-2024.html

24. For cotton, only the 2021 data were available at the time of writing.
25. Data were updated after Willer et al. (2024) was published and are therefore now slightly higher.
26. Every year, FiBL collects data on organic agriculture that are published in the annual joint FiBL/IFOAM - Organics International publication The World of Organic Agriculture. Textile Exchange provided the data on organic cotton shown in this report. For more information, see www.organic-world.net

www.pefc.org

PROGRAMME FOR THE ENDORSEMENT OF FOREST CERTIFICATION

Founded in 1999, the Programme for the Endorsement of Forest Certification is a leading global alliance of national forest certification systems with more than 80 international members. The non-profit, non-governmental organization promotes sustainable forest management through independent third-party certification. Certified entities must meet strict environmental, social and economic requirements. PEFC enables all forest owners around the world to demonstrate responsible practices and access certification and empowers companies and consumers to buy sustainably.

More than 288 million hectares of forest worldwide were PEFC-certified in 2022 – 7.1% of the global forest area. Canada had by far the largest PEFC-certified forest area, with almost 126 million hectares, followed by the United States (more than 34 million ha). There were 12,385 chain-of-custody certificate holders.

The PEFC-certified area decreased by almost 7% in 2018–22 and by 12.3% in 2021–22. The decline since 2021 is due to the suspension of the Russian National Voluntary Forest Certification System and the National Forest Certification System of Belarus, which accounted for more than 40,000 hectares in 2021.

PEFC: Key indicators, 2022	
Forest area [hectares]	288,154,245
PEFC share of global forest area	7.1%
Chain-of-custody certificate holders	12,385

Source: PEFC, 2024.

www.proterrafoundation.org/

PROTERRA FOUNDATION

The non-profit ProTerra Foundation was created in 2006 and became independent in 2012. Its standards are applied primarily to the sustainable production of soy, sugarcane and their derived consumer products, but are designed to encompass all agricultural products and offer full traceability. Key components centre on protecting high conservation value areas, biodiversity and the rights of communities, Indigenous people and smallholders, and promoting good labour and agricultural practices.

In 2022, more than 2.1 million hectares were ProTerra-certified or Good Agricultural Practice-audited.[27] The ProTerra standard was applied mainly in the production of non-genetically modified soybean and sugarcane. There were more than 660,000 hectares of soybeans, 0.5% of the global soybean area and more than 1 million hectares of sugarcane, upwards of 4% of the global sugarcane area.

ProTerra-certified producers were active in 27 countries, with the largest certified area in Brazil (almost 740,000 hectares), representing almost 50% of the foundation's global area. The total area decreased by 3% in 2018–22 but grew by almost 13% in 2021–22.

ProTerra: Key indicators, 2022	
Total area [hectares]	2,136,304
▪ Soybeans	664,700
▪ Sugarcane	1,087,904
ProTerra share of global agricultural land	0.04%
ProTerra share of global soybean area	0.5%
ProTerra share of global sugarcane area	4.1%
Certificate holders	82
Producers	105,328 [28]

Source: ProTerra, 2024.

27. Of the total area certified, 78% was Good Agriculture Practice-audited.
28. Direct comparison with data prior to 2020 is not possible due to changes in the way producers are counted.

www.rainforest-alliance.org/

RAINFOREST ALLIANCE

Rainforest Alliance and UTZ merged in 2018 to form a new Rainforest Alliance organization. The international non-profit organization aims to create a more sustainable world by using social and market forces to protect nature and improve the lives of farmers and forest communities. Its work connects with many of the crops and products people use every day including coffee, tea, cocoa and bananas.

In 2022, for the first time, all data were reported under Rainforest Alliance,[29] following the organization's 2020 Sustainable Agriculture Standard. Rainforest Alliance certified more than 5.2 million hectares of a wide variety of commodities, representing 0.1% of the global agricultural area.

Cocoa had the largest harvested area (more than 3 million hectares), representing 28% of the global cocoa area. This was followed by coffee (more than 1 million hectares; 9% of the global coffee area) and tea (almost 580,000 hectares; 11% of the global tea area). This marks a notable increase in cocoa and coffee certification that was previously certified under UTZ.

Côte d'Ivoire had the largest certified area (more than 2 million ha) followed by Ghana (more than 500,000 ha) and Kenya (more than 300,000 ha).

Rainforest Alliance: Key indicators, 2022[30]	
Area [hectares]	5,242,966
Rainforest Alliance share of global agricultural land	0.1%
Rainforest Alliance share of global cocoa area	28%
Rainforest Alliance share of global coffee area	9%
Rainforest Alliance share of global tea area	11%
Production volume[31] [MT]	26,236,167

Source: Rainforest Alliance, 2024.

29. Due this shift, data are not necessarily comparable with previous years.
30. Data for 2022 on producers and certificate holders were not available.
31. Excluding flowers and foliage.

www.rspo.org

ROUNDTABLE ON SUSTAINABLE PALM OIL

Founded in 2004, the Roundtable on Sustainable Palm Oil is a member-based initiative that unites stakeholders from the key sectors of the palm oil industry across 106 countries and territories. Certification supports smallholders to improve their livelihoods and produce more oil using less land, and reduces the risk of land conversion, which threatens forests, wildlife and biodiversity.

Almost 4.9 million hectares were RSPO-certified in 2022, representing 0.1% of global agricultural land and 12.4% of the global oil palm area. The largest areas were in Indonesia (more than 2.4 million hectares), Malaysia (more than 1.3 million hectares) and Gabon (more than 202,000 hectares). Asia had the largest RSPO-certified area (78%), followed by Latin America (10%), Africa (8%) and Oceania (4%). The RSPO-certified oil palm area grew by more than 30% in 2018–22 and increased by almost 31% in 2021–22.

RSPO: Key indicators 2022	
Area [hectares]	4,893,346
RSPO share of global agricultural land	0.1%
RSPO share of global oil palm area	12.4%
Production volume, oil palm[32] [MT]	78,295,983
Production volume,[33] palm oil [MT]	17,052,440
Production volume, palm oil sold under the label [MT]	9,546,748
Certificate holders[34]	576
Producers (excluding mills and supply bases)[35]	167,467

Source: RSPO, 2024.

32. Refers to the fresh fruit bunches of the oil palm.
33. The production volume of palm oil refers to the 'certified volume', i.e. the estimated volume to be produced by a management unit based on historical production data.
34. Refers to the number of certified palm oil mills and independent smallholder groups.
35. Refers to the number of members certified under the scheme and independent smallholders.

ROUND TABLE ON RESPONSIBLE SOY

www.responsiblesoy.org

ROUND TABLE ON RESPONSIBLE SOY ASSOCIATION

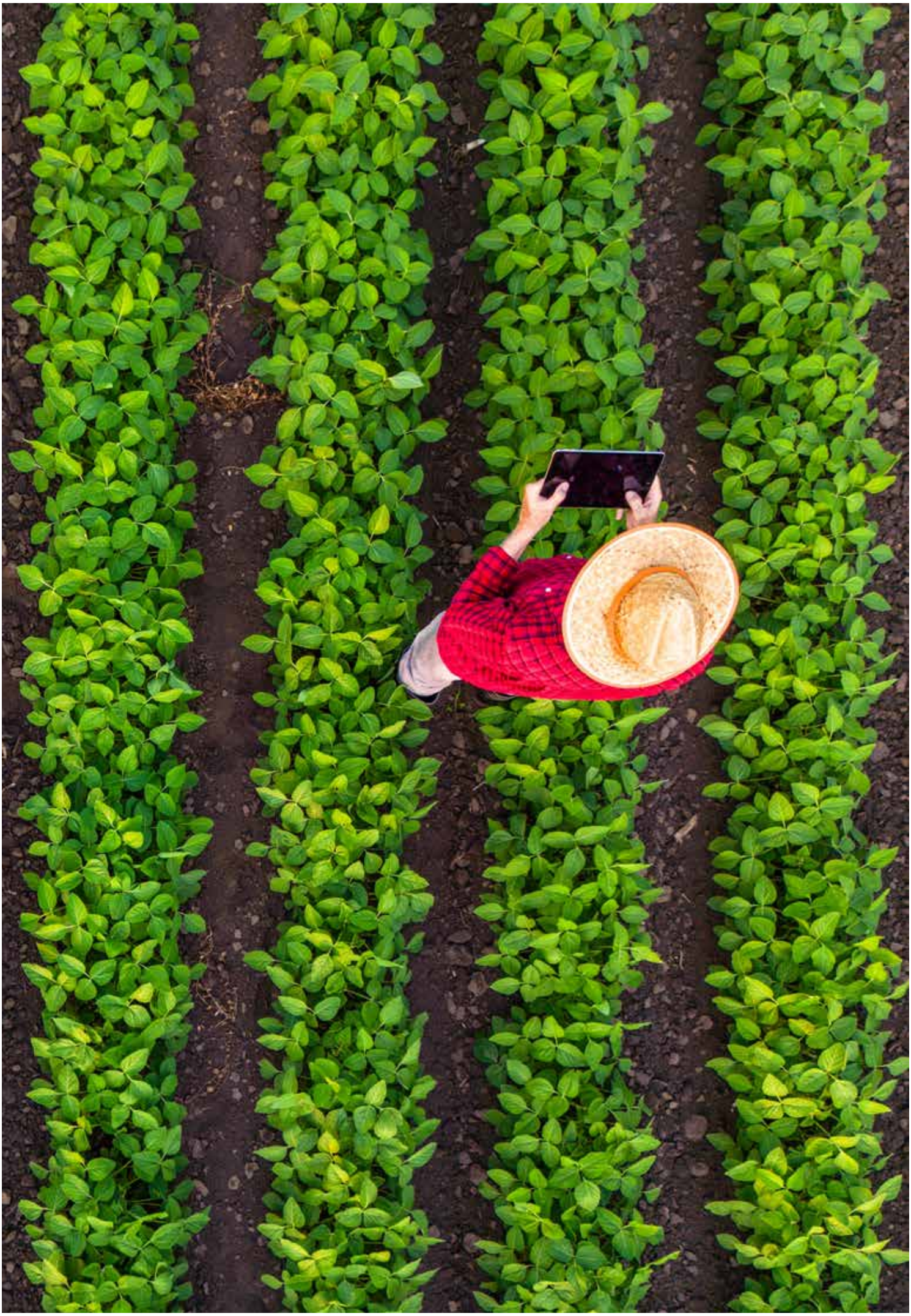
The Round Table on Responsible Soy Association is a global multistakeholder non-for-profit organization. It promotes the production, trade and use of responsible soy – which is economically viable, socially beneficial and environmentally appropriate – through cooperation with actors in and relevant to the soy value chain from production to consumption in an open dialogue.

RTRS also sets the standards for responsible soy and chain of custody. Notably, the RTRS Standard for Responsible Soy Production scheme ensures that RTRS soy not only meets the highest environmental criteria (including a guarantee of third party-verified zero deforestation and zero conversion), but also a wide-reaching set of social and labour requirements. It is based on five principles: Legal Compliance and Good Business Practices; Responsible Labor Conditions; Responsible Community Relations; Environmental Responsibility and Good Agricultural Practices.

In 2022, RTRS certified more than 2 million hectares, representing 0.04% of global agricultural land and 1.6% of the global soybean area. A total of 66,374 producers harvested upwards of 7 million tons of soybeans worldwide. Brazil had the largest RTRS area (more than 1.5 million hectares), followed by India (more than 228,000 hectares). The RTRS-certified area increased by 60% in 2018–22 and by 52% from 2021–22.

RTRS: Key indicators, 2022	
Area [hectares]	2,028,070
RTRS share of global agricultural land	0.04%
RTRS share of global soybean area	1.6%
Production volume [tons]	7,048,484
Certificate holders	98
Producers	66,374

Source: RTRS, 2024.



CHAPTER 5

METHODOLOGY

METHODOLOGY

The data presented in this report were obtained directly from the standard-setting organizations or indirectly from published annual reports and other literature. For organic agriculture, data were gathered from private-sector organizations, governments and certification bodies as part of the annual FiBL survey on organic agriculture worldwide (Willer et al. 2024). The data collection process, voluntary sustainability standards, indicators and commodities covered, as well as the quality checks carried out, are described below.

FiBL sent a standardized questionnaire to the sustainability standard organizations in early 2024. All of them returned data, but not consistently across all the indicators requested and not on all commodities.

Please note that for this edition, revised data for previous years were received for some standards and numbers may differ from previous editions of this report.

Focus on commodities

The focus was on the same crops as in previous editions of T*he State of Sustainable Markets* (Lernoud et al., 2015, 2017, 2018; Willer et al., 2019; Meier et al., 2020; Meier et al., 2021; Willer et al., 2022; Kemper et al., 2023): bananas, cocoa, coffee, cotton, oil palm, soy, sugarcane and tea, as well as forestry. The sustainability standards were also asked to provide data on other crops they covered and on the total certified area.

Sustainability standards

The following standards were analysed:[36]

- 4C (previously 4C Association)
- Better Cotton (previously Better Cotton Initiative)
- Bonsucro
- Cotton made in Africa
- Fairtrade International
- Forest Stewardship Council
- GLOBALG.A.P.
- IFOAM – Organics International[37]
- Programme for the Endorsement of Forest Certification
- ProTerra Foundation
- Rainforest Alliance
- Roundtable on Sustainable Palm Oil
- Round Table on Responsible Soy

36. For more information about the standards, see the ITC Standards Map: www.sustainabilitymap.org.
37. Not all production considered organic actually complies with IFOAM norms. IFOAM – Organics International is nevertheless the leading global reference for defining organic standards. Market data on organic production and trade include all recognized organic production, regardless of whether the production complies with IFOAM criteria per se.

List of indicators

The sustainability standards that were surveyed for this report were asked to provide data on the following indicators:

Indicator	Definition	Unit of measure
Area		
Area	Area certified (fully converted plus under conversion)	Hectares
Area harvested	Area actually harvested	Hectares
Production		
Production value	Value of production volume that is VSS-compliant, even if not sold as compliant at the first point of sale	$ million
Production volume	Production volume that is VSS-compliant, even if not sold as compliant at the first point of sale	Tons
Production volume sold under a VSS label	Volume of VSS-compliant product that is sold as compliant at the first point of sale (e.g. from cooperative to trader)	Tons
Operators		
Certificate holder	Total number of current valid certificates and those in process	Number
Producer	Production unit operated under a single management for the purpose of producing agricultural products (including processing, packaging and initial labelling of own crop and livestock products on the farm)	Number

This publication focuses on the indicators for which all sustainability standards provided data: area, area harvested, production volume and producers/operators.

Quality checks

The following quality checks were used to validate the data received from the standards:

- Area and production data were compared with the data from previous years as provided by the sustainability standards themselves in previous surveys (Lernoud et al., 2015, 2017, 2018; Willer et al., 2019; Meier et al., 2020 and 2021; Willer et al., 2022' Kemper et al., 2023) or as available in the IISD database (data as published by Potts et al., 2014).
- Area and production data were compared with the total area and production as provided by FAO (FAOSTAT, 2024).
- Yields provided by FAO were compared with the yields calculated based on the area and production data provided by the sustainability standards.

Pivot tables were used to analyse the data, which enabled the identification of data anomalies. The standards were asked to explain suspicious data, which resulted either in plausible explanations or in data revisions.

For most countries and territories, the Standard Country and Area Classifications as defined by the United Nations Statistics Division were applied. Where the designation 'country' appears in this report, it covers countries or areas. To calculate the share of the total certified area and commodity area, per country and worldwide, total country and world data were taken from the FAOSTAT database (FAOSTAT, 2024).[38]

38. FAOSTAT, Data Archives, the FAO Homepage, FAO, Rome, at faostat.org > Inputs > Land at http://faostat3.fao.org/download/E/*/E.

Data year

Data collected and reported as crop year spanning two consecutive years were relabelled as, and attributed to, the latter of the two years. For instance, data reported in 2021/22 were labelled as 2022 in the report to ensure consistency in data handling. This assumption was necessary to allow comparisons across the standards, as there are inconsistencies in how they report their data.

Multiple certification skews calculations

Reporting a global total of certain commodities remains difficult. This is because many producers are certified by more than one sustainability standard, and there are not enough reliable data on the share of multiple certification. Considering this, FiBL, IISD and ITC decided that the best approach was to provide a range that encompassed the minimum and the maximum amounts possible, along with the average of the two at the country level.

To calculate the maximum, the total area and production volume of all standards in the country were aggregated. For the minimum, the sustainability standard with the largest area or most production volume in the country was used as the reference. An average of the maximum and minimum was then calculated. These figures must be treated with caution, however, as they are estimates that indicate a trend.

The survey asked for the extent of multiple certification by country and for the standard in question. Only two standards provided data on multiple certification, which made it impossible to calculate the actual share of multiple certification.

FiBL, IISD and ITC agreed to implement the method explained above to be able to report a development trend for each of the selected commodities. Nevertheless, the three organizations remain committed to providing more accurate global figures in subsequent publications as data on multiple certification become available. FiBL and ISEAL Alliance are working to improve the availability of data on multiple certification from ISEAL members.

Data publication and revisions

Data going back to 2008 have been stored in the ITC Trade for Sustainable Development database and are available in the 'Trends' module of the Sustainability Map portal, www.sustainabilitymap.org/trends. Data revisions and corrections will be communicated at https://vss.fibl.org/vss-report.

Interactive online graphics

Graphics previously available as part of The State of Sustainable Markets report are now available on the ITC Standards Map at https://www.standardsmap.org/en/trends.

Digitalizing visual data provides numerous advantages, including:

- Wider dissemination and reach of the data included in the report;
- Facilitated access to specific information;
- Additional use of the information, as this year's report integrates not only a 'commodity' and 'standard' dimension, but it is possible to explore data by 'country'. While the report previously provided information for only the top 10 countries, it is now possible to review information across country, standard and commodity.
- Easier continuous data update to ensure data integrity after the report is published;
- Interested parties can download and analyse data in its raw form.

Accessing the SSM 2024 Dashboard

- Go to https://www.standardsmap.org/en/trends.
- Click on one of the two images to explore data pertaining to either the agriculture or forestry sector.

Navigating the SSM 2024 Dashboard

Explore key graphics and tables that provide an overview of the most recent trends specific to a sector.

To further refine your analysis, select a focus area to explore this year's trends:

- By country
- By commodity / for forestry
- By VSS

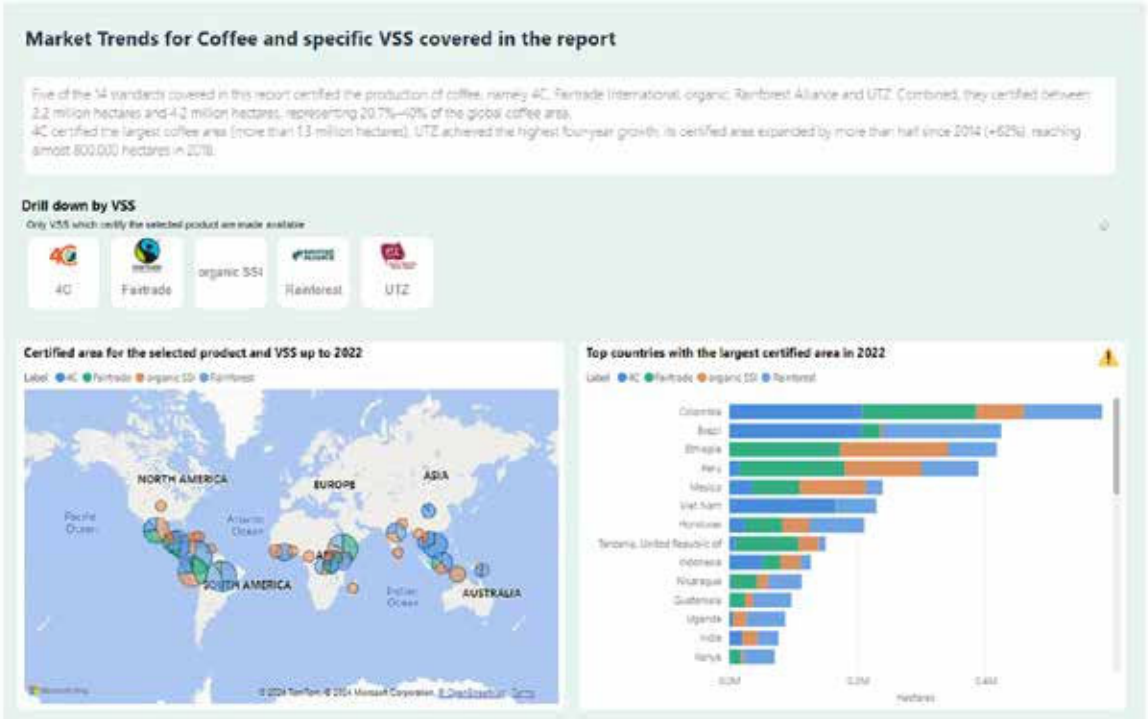
Download data

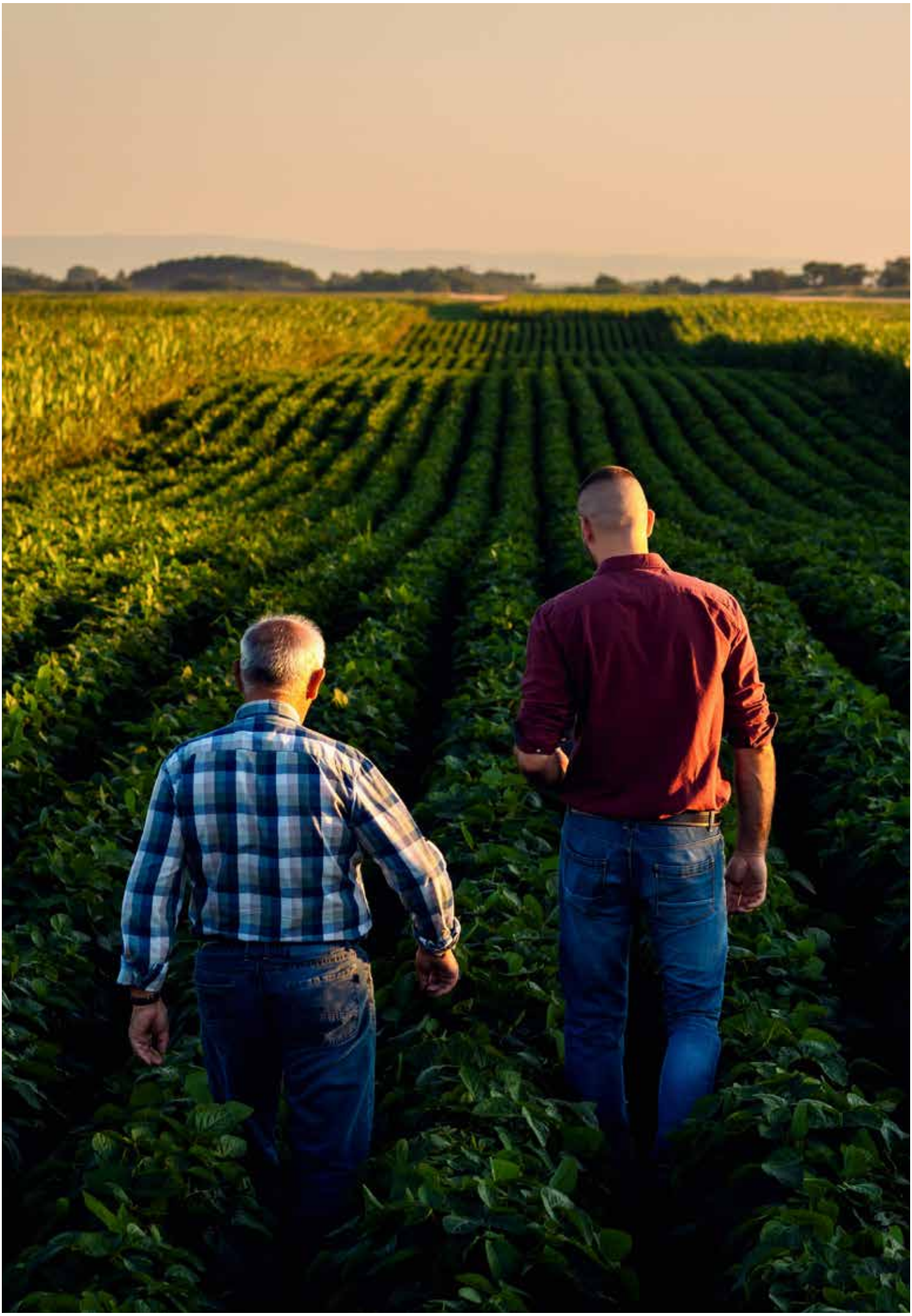
Structure of the SSM 2024 Dashboard

Each focus area has two levels of analysis.

- First level – Users are invited to refine their analysis based on a country, commodity/forestry or VSS, depending on the focus area that was selected.

- Users then have the option lower on the page to review information specific to their selection.





TABLES

Table 7: Ranges of certified area by agricultural commodity, 2022

Commodity	Indicator	Area harvested [ha]	Share of global area	Area growth 2021–22	Area growth 2018–22
Bananas	Minimum area possible	373,628	7.0%	6.6%	9.0%
	Average area	485,876	9.1%	-1.5%	5.2%
	Maximum area possible	598,125	11.3%	-6.0%	3.0%
Cocoa	Minimum area possible	3,652,454	31.4%	44.5%	15.1%
	Average area	4,407,179	37.8%	26.4%	4.9%
	Maximum area possible	5,161,904	44.3%	16.2%	-1.3%
Coffee	Minimum area possible	1,716,952	15.2%	4.2%	-21.8%
	Average area	2,602,839	23.0%	-8.3%	-19.0%
	Maximum area possible	3,488,723	30.8%	-13.4%	-17.6%
Cotton	Minimum area possible	6,601,230	20.1%	-1.4%	12.2%
	Average area	6,817,689	20.7%	-1.6%	11.4%
	Maximum area possible	7,034,144	21.4%	-1.8%	10.6%
Oil palm	Minimum area possible	3,583,461	12.4%	6.5%	25.1%
	Average area	3,598,451	12.4%	4.9%	24.7%
	Maximum area possible	3,613,444	12.5%	3.4%	24.3%
Soybeans	Minimum area possible	2,934,165	2.3%	33.6%	49.9%
	Average area	3,303,026	2.5%	28.2%	33.8%
	Maximum area possible	3,671,887	2.8%	24.2%	23.2%
Sugarcane	Minimum area possible	3,040,492	11.5%	31.0%	36.9%
	Average area	3,335,490	12.7%	26.3%	40.8%
	Maximum area possible	3,630,486	13.8%	22.6%	44.3%
Tea	Minimum area possible	684,527	13.0%	-10.0%	1.5%
	Average area	764,683	14.6%	-10.8%	-3.5%
	Maximum area possible	844,837	16.1%	-11.4%	-7.1%

Sources: FiBL-ITC-IISD/SSI survey, 2024: 4C Services, 2014–16, 2018–24; Better Cotton, 2014, 2015, 2017–24; Bonsucro, 2014–16, 2018–24; Cotton made in Africa, 2014–16, 2018–24; Fairtrade International, 2017–24; GLOBALG.A.P., 2015, 2016, 2018–24; FiBL survey, 2008–24; ProTerra Foundation, 2014–16, 2018–24; Rainforest Alliance, 2014–16, 2018–24; Roundtable on Sustainable Palm Oil, 2019–24; Round Table on Responsible Soy, 2014–16, 2018–24; Textile Exchange 2013–24.

Table 8: Area harvested by agricultural commodity and standard, 2022

Commodity	Standard	Area harvested [ha]	Share of global area harvested	Area growth 2021–22	Area growth 2018–22
Bananas	Rainforest	164,573	3.10%	-11.2%	-1.1%
	Fairtrade	50,347	0.95%	0.6%	22.4%
	GLOBALG.A.P.	342,930	6.46%	-0.6%	14.7%
	Organic	84,249	1.59%	-13.5%	13.9%
Cocoa	Rainforest	3,265,560	28.03%	531.1%	351.4%
	Fairtrade	1,538,331	13.20%	1.0%	30.5%
	Organic	486,879	4.18%	13.0%	53.0%
Coffee	Rainforest	1,013,944	8.95%	73.9%	115.4%
	4C	831,900	7.34%	5.0%	-37.4%
	Fairtrade	1,019,160	8.99%	-11.6%	6.0%
	Organic	733,835	6.48%	-8.0%	4.6%
Cotton	CmiA	1,824,743	5.54%	7.0%	2.5%
	Fairtrade	71,897	0.22%	26.1%	29.5%
	Organic*	621,691	1.89%	0.0%	74.6%
	Better Cotton	4,548,909	13.82%	-5.4%	9.2%
Oil palm	Organic	44,120	0.15%	36.4%	416.0%
	RSPO	3,569,324	12.35%	6.4%	27.1%
Soybeans	Organic	979,117	0.76%	-1.3%	52.0%
	ProTerra	664,700	0.51%	5.0%	-38.0%
	RTRS	2,028,070	1.56%	52.3%	60.5%
Sugarcane	Bonsucro	2,379,399	9.03%	27.8%	110.8%
	Fairtrade	108,765	0.41%	-4.1%	-27.4%
	Organic	105,844	0.40%	-1.0%	-1.4%
	ProTerra	1,087,904	4.13%	15.7%	-3.7%
Tea	Rainforest	578,566	11.02%	-16.6%	-2.5%
	Fairtrade	137,432	2.62%	17.8%	0.7%
	Organic	166,501	3.17%	19.2%	58.1%

**Organic cotton data are from 2021*

Sources: FiBL-ITC-IISD/SSI survey, 2024: 4C Services, 2014–16, 2018–24; Better Cotton, 2014, 2015, 2017–24; Bonsucro, 2014–16, 2018–24; Cotton made in Africa, 2014–16, 2018–24; Fairtrade International, 2017 – 2024; GLOBALG.A.P., 2015, 2016, 2018–24; FiBL survey, 2008–24; ProTerra Foundation, 2014–16, 2018–24; Rainforest Alliance, 2014–16, 2018–24; Roundtable on Sustainable Palm Oil, 2019–24; Round Table on Responsible Soy, 2014–16, 2018–24; Textile Exchange 2013–24.

Table 9: Estimated production volume ranges by agricultural commodity, 2022

Commodity	Indicator	Estimated production [MT]	Share of global production	Production growth 2021–22	Production growth 2018–22
Bananas*	Minimum production possible	9,585,897	8.2%	-6.4%	0.6%
	Average	10,138,941	8.7%	-12.3%	-2.4%
	Maximum production possible	10,691,983	9.2%	-16.9%	-4.9%
Cocoa	Minimum production possible	2,330,188	41.6%	83.1%	38.2%
	Average	2,708,970	48.4%	49.4%	23.5%
	Maximum production possible	3,087,749	55.2%	31.2%	14.4%
Coffee	Minimum production possible	2,445,592	24.4%	3.3%	-8.1%
	Average	3,405,086	33.9%	-9.4%	-11.7%
	Maximum production possible	4,364,578	43.5%	-15.3%	-13.6%
Soybeans	Minimum production possible	8,864,368	2.7%	41.2%	43.9%
	Average	10,035,002	3.0%	36.9%	28.6%
	Maximum production possible	11,205,632	3.4%	33.7%	18.7%
Tea	Minimum production possible	1,638,961	25.2%	4.8%	17.2%
	Average	1,776,015	27.3%	1.3%	12.4%
	Maximum production possible	1,913,070	29.4%	-1.5%	8.6%

** Production volume of bananas is missing for GLOBALG.A.P.*

Sources: FiBL-ITC-IISD/SSI survey, 2024: 4C Services, 2014–16, 2018–24; Better Cotton, 2014, 2015, 2017–24; Bonsucro, 2014–16, 2018–24; Cotton made in Africa, 2014– 6, 2018–24; Fairtrade International, 2017–24; GLOBALG.A.P., 2015, 2016, 2018–24; FiBL survey, 2008–24; ProTerra Foundation, 2014–16, 2018–24; Rainforest Alliance, 2014–16, 2018–24; Roundtable on Sustainable Palm Oil, 2019–24; Round Table on Responsible Soy, 2014–16, 2018–24; Textile Exchange 2013–24.

Please note that due to methodological challenges, the production ranges cannot be made available for all the selected commodities.

Table 10: Estimated production volume by agricultural commodity and standard, 2022

Commodity	Standard	Estimated production [MT]	Share of global production	Production growth 2021–22	Production growth 2018–22
Bananas*	Rainforest	8,890,911	7.17%	-5.5%	5.7%
	Fairtrade	1,484,649	1.20%	1.6%	47.7%
	Organic	1,801,072	1.45%	-8.9%	0.0%
Cocoa	Rainforest	2,155,695	38.63%	531.8%	433.3%
	Fairtrade	712,978	12.78%	2.0%	32.9%
	Organic	219,076	3.93%	0.1%	38.8%
Coffee	Rainforest	1,580,108	15.93%	85.6%	141.1%
	4C	1,696,520	17.11%	4.5%	-20.7%
	Fairtrade	707,302	7.13%	-23.4%	-5.1%
	Organic	380,649	3.84%	-22.1%	-6.7%
Soybeans	Organic	1,764,716	0.48%	0.8%	21.0%
	ProTerra	2,392,432	0.65%	20.8%	-31.9%
	RTRS	7,048,484	1.91%	51.9%	57.8%
Tea	Rainforest	1,326,267	4.96%	2.1%	9.6%
	Fairtrade	181,312	0.68%	0.4%	-4.5%
	Organic	405,491	1.52%	10.3%	67.9%

** Production volume of bananas is missing for GLOBALG.A.P.*

Sources: FiBL-ITC-IISD/SSI survey, 2024: 4C Services, 2014–16, 2018–24; Better Cotton, 2014, 2015, 2017–24; Bonsucro, 2014–16, 2018–24; Cotton made in Africa, 2014–16, 2018–24; Fairtrade International, 2017–24; GLOBALG.A.P., 2015, 2016, 2018–24; FiBL survey, 2008–24; ProTerra Foundation, 2014–16, 2018–24; Rainforest Alliance, 2014–16, 2018–24; Roundtable on Sustainable Palm Oil, 2019–24; Round Table on Responsible Soy, 2014–16, 2018–24; Textile Exchange 2013–24.

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- **Forest Stewardship Council International (FSC):** Data were provided FSC International, Bonn, Germany; see also FSC annual reports on www.fsc.org.
- **GLOBALG.A.P.:** Data were provided by GLOBALG.A.P., Cologne, Germany, starting with 2012 data.
- **Organic:** FiBL surveys among national data providers and certifiers. Based on the data on the certified area, FiBL estimates the area harvested and the production volume. For full list of original data sources, see www.organic-world.net/yearbook. The organic cotton data were provided by Textile Exchange, United Kingdom, textileexchange.org.
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