

# Multiple Certification in Coffee & Cocoa

Multiple certification patterns of ISEAL member schemes  
in the coffee and cocoa industries.

October 2018



# ISEAL MEMBER SCHEMES HAVE COLLABORATED ON SHARED REPORTING SINCE 2011. THIS INITIATIVE HAS LED TO NEW INSIGHT INTO THE LEVEL OF MULTIPLE CERTIFICATION IN THE SUSTAINABLE COFFEE AND COCOA SECTORS.

Sustainability standards have been operational in the coffee and cocoa sectors for over two decades. An increase in the number of sustainability standards has sparked global conversations about the roles and value that different standards offer in the market and to producers. Multiple certification is one prominent discussion point: why producers choose to be certified under multiple schemes, what value they receive in return and what the actual extent of multiple certification is. This briefing paper shares a picture of multiple certification in 2015 for four leading ISEAL member agriculture schemes: Rainforest Alliance<sup>1</sup>, UTZ<sup>2</sup>, Fairtrade International and the Global Coffee Platform.<sup>3</sup>

## KEY TAKEAWAYS Multiple certification amongst ISEAL member schemes in 2015<sup>4</sup>

<p><b>1</b></p> <p><b>Multiple certification has a stronger presence in coffee than in cocoa</b></p> <ul style="list-style-type: none"><li>• 13% of cocoa certificates and 21% of certified area is multiple certified.</li><li>• 17% of coffee certificates and 33% of certified area is multiple certified.</li></ul>	<p><b>2</b></p> <p><b>Multiple certified groups tend to be larger than non-multiple certified groups</b></p> <ul style="list-style-type: none"><li>• 77% of multiple certified cocoa groups have greater than 300 members, compared to 61% of non-multiple certified groups.</li><li>• 59% of multiple certified coffee groups have greater than 300 group members, compared to 46% of non-multiple certified groups.</li></ul>	<p><b>3</b></p> <p><b>Multiple certification is higher in certain regions/countries than others</b></p> <ul style="list-style-type: none"><li>• 68% of multiple certified cocoa certificates are in Ivory Coast.</li><li>• For coffee, 45% are in Colombia, Peru and Kenya.</li></ul>
<p><b>4</b></p> <p><b>The most common combination for both coffee and cocoa is of UTZ and Rainforest Alliance</b></p> <ul style="list-style-type: none"><li>• 58% of cocoa certificates, and 60% of coffee certificates are a combination of UTZ and Rainforest Alliance.</li></ul>	<p><b>5</b></p> <p><b>Multiple certification is largely double certification: having three or more certifications is minimal, although more prominent in coffee compared to cocoa</b></p> <ul style="list-style-type: none"><li>• 14% of multiple certified cocoa certificates have triple certification (or 2% of all cocoa certificates are triple certified).</li><li>• 25% of multiple certified coffee certificates have triple certification (or 4% of all coffee certificates are triple certified).</li></ul>	

<sup>1</sup> Rainforest Alliance data included in this report is before the UTZ/Rainforest Alliance merger, and thus is related to certification under the SAN standard.

<sup>2</sup> In January 2018, the Rainforest Alliance and UTZ merged to create one organization, taking the Rainforest Alliance name. The two certification programs will continue to run in parallel until at least 2020, when a new certification program is published.

<sup>3</sup> The Global Coffee Platform data in this report dates from when GCP was the 4C Association with a 4C Code of Conduct.

<sup>4</sup> Multiple certification analysis only considers the overlap of the ISEAL member schemes and does not include other certifications such as Organic or C.A.F.E. Practices.

## ABOUT THIS PAPER

ISEAL member standards systems have been collaborating on shared reporting since 2011 to better understand their collective mark on sustainability and to identify opportunities to work together to deepen impacts on people and the environment. This paper is one of three that will be produced from data pooled across ISEAL member schemes. The other two will address trends in geographic reach and coverage of smallholders.

The goal of this first paper is to better understand to what extent farmers are certified by one or more ISEAL member scheme, to identify key characteristics of multiple certified certificate holders, and to examine regional and commodity-specific patterns in multiple certification. The analysis only considers the overlap of four ISEAL member schemes and does not include multiple certification with other certifications such as Organic or C.A.F.E. Practices.

### ABOUT THE DATA AND ANALYSIS

The analysis in this report is based on 2015 certificate level data from Rainforest Alliance, UTZ, Fairtrade International, and Global Coffee Platform. Data on over 20 indicators on each certificate was centralized in a common database. Much manual effort was required to clean the data, align formatting and find matching certificates. After multiple rounds of feedback from ISEAL members and of data quality improvements, a level of data quality was reached where the data could be analysed with reasonable confidence.

### PREVIOUS ESTIMATES OF MULTIPLE CERTIFICATION

Due to lack of access to multiple certification data in the past, researchers have had trouble reporting overarching global statistics for certified products: simply adding up hectares, volumes, and certificates across schemes potentially leads to double counting. The most frequent approach to estimating multiple certification levels is that of the Research Institute of Organic Agriculture (FiBL), the International Trade Centre (ITC), and the International Institute for Sustainable Development (IISD), which is used in the annual State of Sustainable Markets reports. This approach takes into consideration the minimum potential amount of multiple certification (assume 0% multiple certification) and the maximum potential multiple certification overlap (assume 100% multiple certification), and then calculates the estimated level of multiple certification by taking the average of this minimum and maximum.

To help assess whether this approach is a good general representation of multiple certification levels, this paper compares the FiBL-ITC-SSI estimates to multiple certification levels calculated with actual 2015 data.



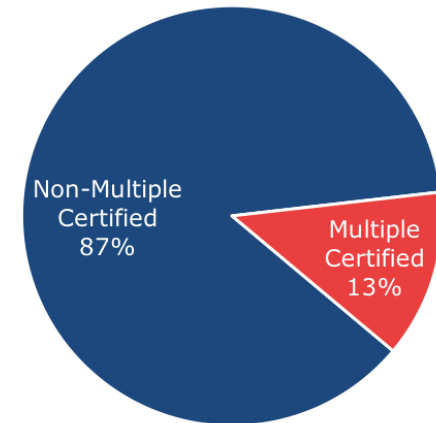
## COCOA DEEP DIVE: MULTIPLE CERTIFICATION ANALYSIS

Fairtrade International, Rainforest Alliance and UTZ are the three ISEAL member schemes present in the cocoa sector. 13% of total certificates in the cocoa sector are multiple certified by more than one of these schemes, 99% being group certificates as opposed to individual farms. Most multiple certification is a combination of UTZ and Rainforest Alliance (58%) or Fairtrade International and UTZ (52%). A minimal 2% of cocoa certificates are triple certified.

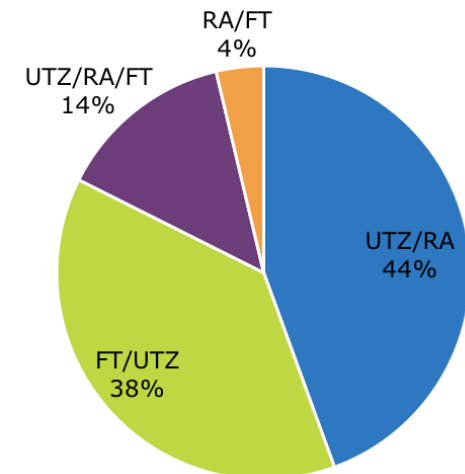
### KEY FACTS

- 13% of cocoa certificates are multiple certified.
- 58% of multiple certified cocoa certificates are UTZ and Rainforest Alliance certified.
- 96% of cocoa multiple certification is a combination of UTZ with another ISEAL member scheme.
- 14% of multiple certified cocoa certificates have triple certification; 2% of all cocoa certificates are triple certified.

SHARE OF CERTIFICATES MULTIPLE CERTIFIED - 2015



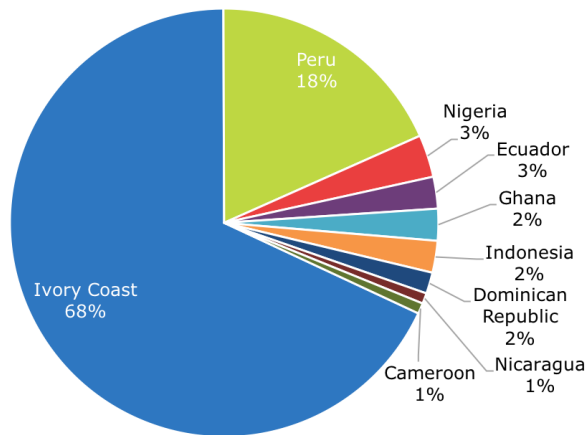
SHARE OF MULTIPLE CERTIFIED CERTIFICATES BY SCHEME COMBINATION - 2015



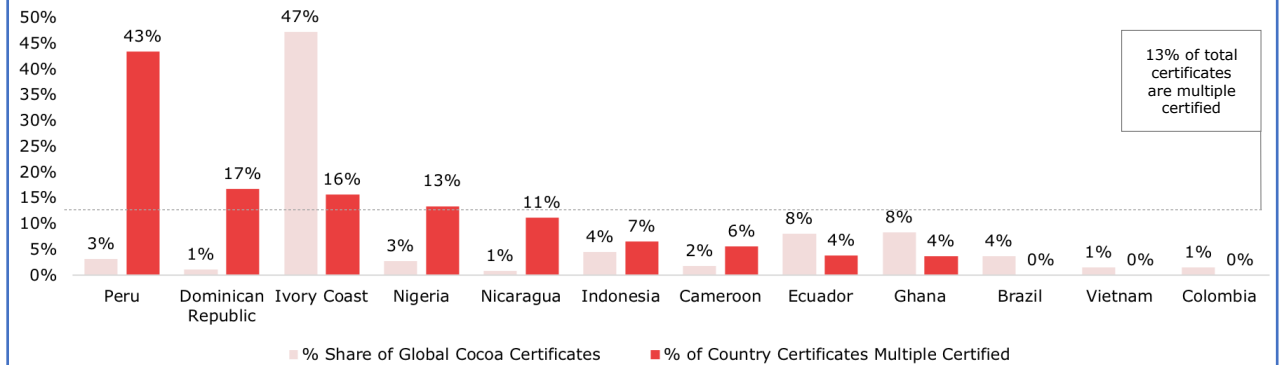
## COCOA MULTIPLE CERTIFICATION REGIONAL CONCENTRATION

68% of multiple certified cocoa certificates are in Ivory Coast. Peru has the highest concentration of multiple certification with 43% of cocoa certificates in Peru being certified by more than one ISEAL member scheme. The Dominican Republic, Nigeria and Nicaragua also have a high percentage of multiple certification compared to their share of total certified number of certificates.

**% SHARE OF MULTIPLE CERTIFIED COCOA CERTIFICATES BY COUNTRY - 2015**



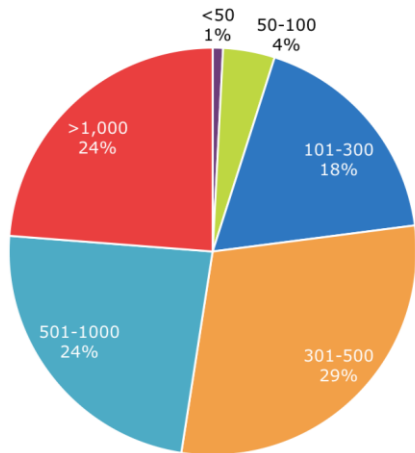
**% SHARE OF GLOBAL CERTIFICATES VS. % SHARE OF COUNTRY CERTIFICATES MULTIPLE CERTIFIED**  
Cocoa Certificates by Country - 2015



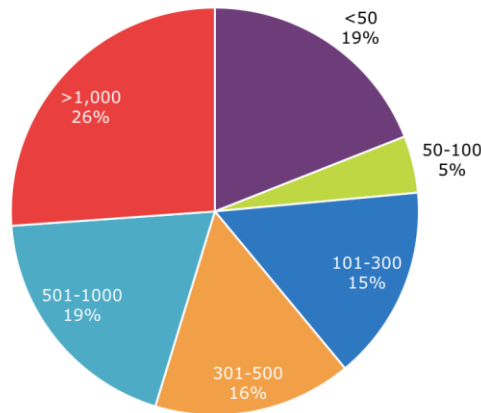
# MULTIPLE CERTIFIED COCOA GROUPS TEND TO BE LARGER THAN NON-MULTIPLE CERTIFIED GROUPS.<sup>5</sup>

99% of cocoa certificates multiple certified are groups, whereas 87% of non-multiple certified cocoa certificates are groups, indicating that most cocoa individual or multi-site farms are not multiple certified. The groups that are multiple certified tend to be larger than non-multiple certified groups; 77% of groups multiple certified have greater than 300 members, whereas 61% of non-multiple certified groups have greater than 300 members.

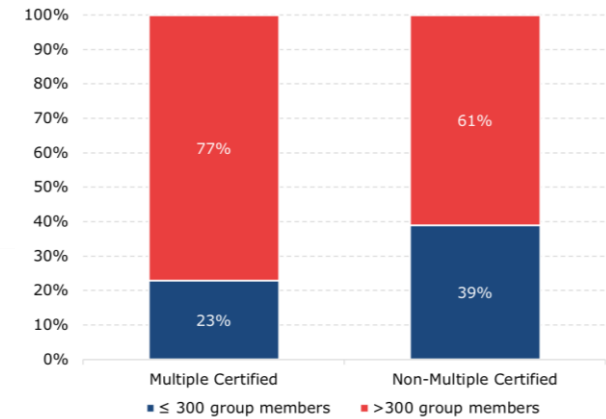
**MULTIPLE CERTIFIED GROUPS**  
% Share of Multiple Certified Group Certificates by Number of Members - 2015



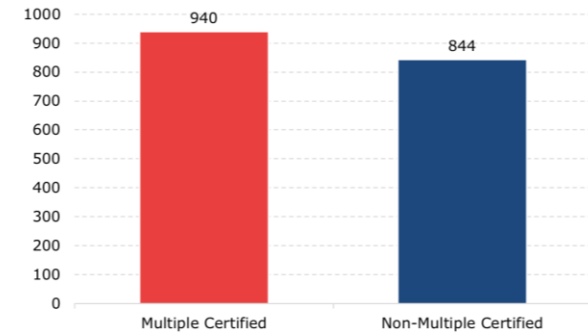
**NON-MULTIPLE CERTIFIED GROUPS**  
% Share of Non-Multiple Certified Group Certificates by Number of Members - 2015



**% SHARE BY GROUP SIZE**  
Multiple Certified vs. Non-Multiple Certified Groups - 2015



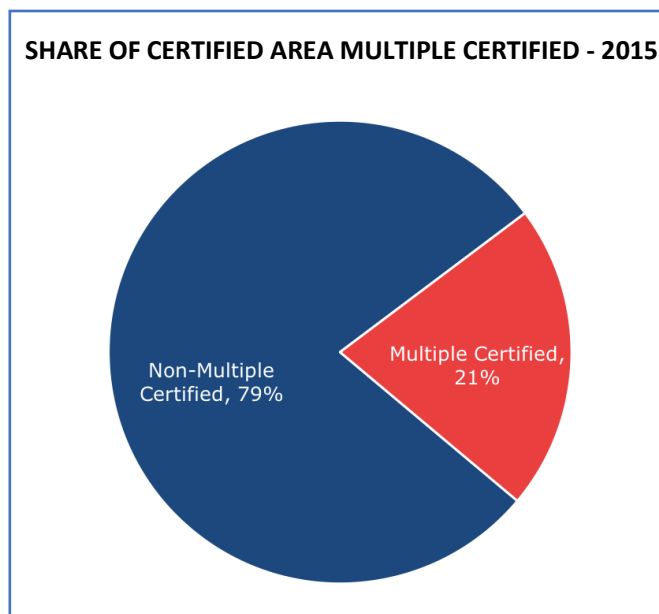
**AVERAGE NUMBER OF GROUP MEMBERS**  
Multiple Certified vs. Non-Multiple Certified Groups - 2015



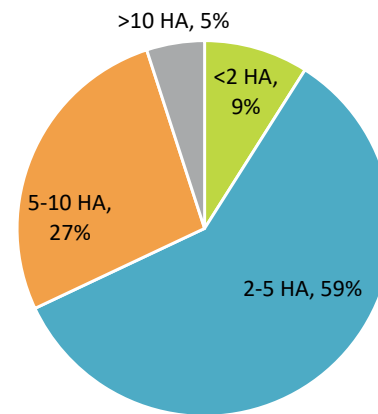
<sup>5</sup> Data quality on certified area, total group members and certified group members varies. These figures are merely indicative.

## COCOA CERTIFIED AREA ANALYSIS<sup>6</sup>

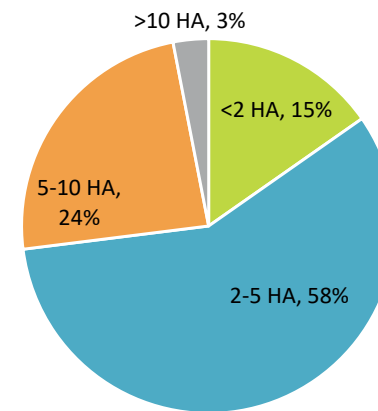
21% of cocoa certified area is multiple certified, compared to 13% of certificates. The majority of cocoa certificates are organized as groups with an average range of 2-5 hectares per producer. Multiple certified groups have a higher share of producers with above 5 hectares compared to non-multiple certified. While non-multiple certified group certificates have a higher share of producers with less than 2 hectares.



**MULTIPLE CERTIFIED GROUP CERTIFICATES**  
% Share of Cocoa Group Certificates by Average Hectares (HA)/Producer - 2015



**NON-MULTIPLE CERTIFIED GROUP CERTIFICATES**  
% Share of Cocoa Group Certificates by Average Hectares (HA)/Producer - 2015



<sup>6</sup> Data quality on certified area, total group members and certified group members varies. These figures are merely indicative.

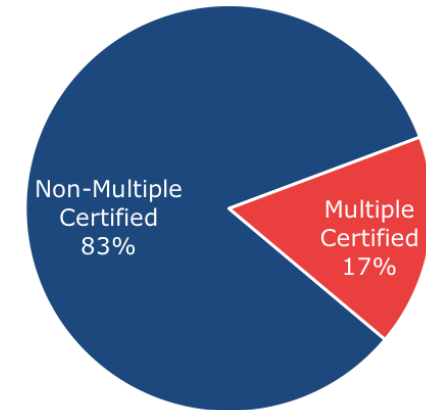
## COFFEE DEEP DIVE: MULTIPLE CERTIFICATION ANALYSIS

Fairtrade International, Rainforest Alliance, UTZ and Global Coffee Platform are the four ISEAL member schemes present in the coffee sector. 17% of total active certificates in the coffee sector are multiple certified by more than one of these schemes, 67% being group certificates as opposed to individual farms or multi-sites. Most multiple certification is a combination of UTZ and Rainforest Alliance (60%) or Fairtrade International and UTZ (30%). 25% of coffee certificates multiple certified are certified by three or more ISEAL member schemes, while 8% of certificates with multiple certification have all four certifications.

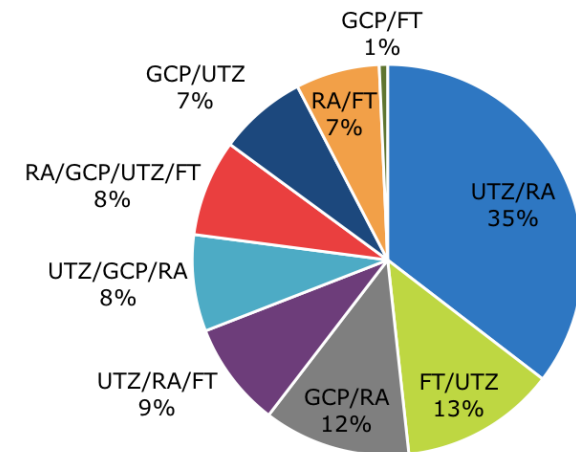
### KEY FACTS

- 17% of coffee certificates are multiple certified.
- 60% of multiple certified coffee certificates are UTZ and Rainforest Alliance certified.
- 80% of coffee multiple certification is a combination of UTZ with another ISEAL member scheme.
- 25% of multiple certified coffee certificates have triple certification; 4% of all coffee certificates are triple certified.

SHARE OF CERTIFICATES MULTIPLE CERTIFIED - 2015



SHARE OF MULTIPLE CERTIFIED CERTIFICATES BY SCHEME COMBINATION - 2015

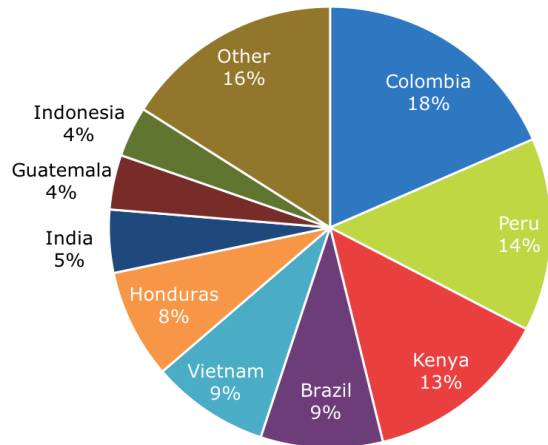




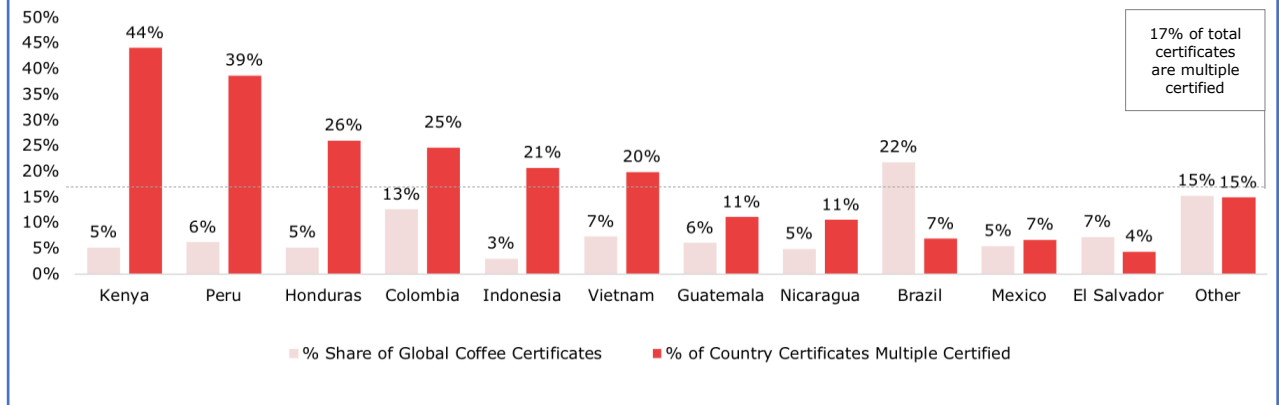
# COFFEE MULTIPLE CERTIFICATION REGIONAL CONCENTRATION

45% of coffee multiple certified certificates are in Colombia, Peru and Kenya. 44% of coffee certificates in Kenya are multiple certified and 39% of certificates in Peru are certified by more than one ISEAL member scheme. Honduras, Indonesia and Vietnam have a higher than average percentage of certificates with multiple certification compared to other countries.

**% SHARE OF MULTIPLE CERTIFIED COFFEE CERTIFICATES BY COUNTRY - 2015**



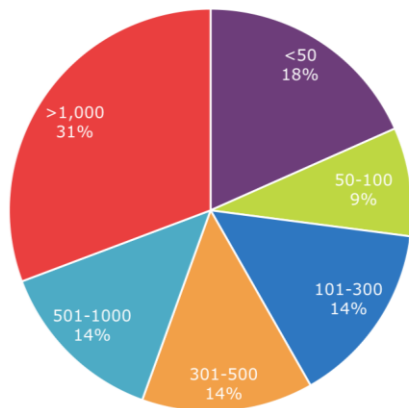
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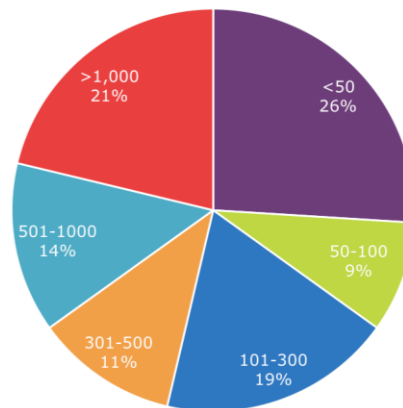
# MULTIPLE CERTIFIED GROUPS TEND TO BE LARGER THAN NON-MULTIPLE CERTIFIED GROUPS.<sup>7</sup>

67% of coffee certificates multiple certified are groups, whereas 56% of non-multiple certified cocoa certificates are groups, indicating that an individual or multi-site farm is less likely to be multiple certified than a group. The groups that are multiple certified tend to be larger than non-multiple certified groups; 59% of multiple certified groups have greater than 300 group members, whereas 46% of non-multiple certified groups have greater than 300 group members.

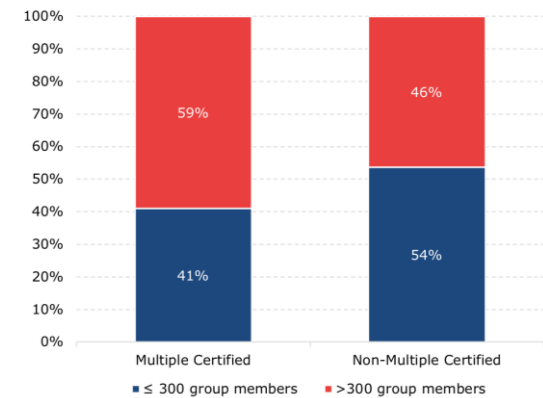
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% Share of Multiple Certified Group Certificates by Number of Members - 2015



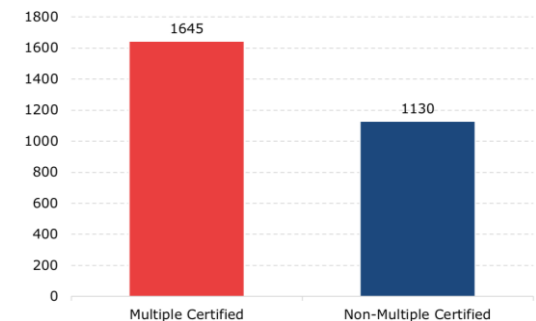
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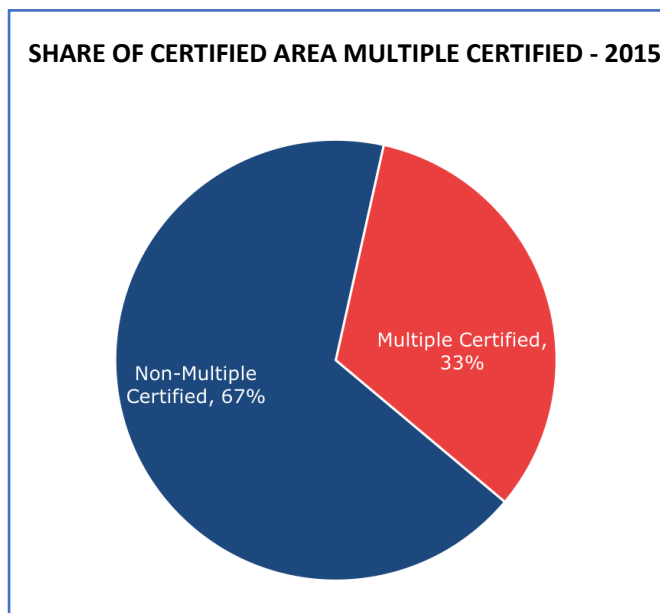
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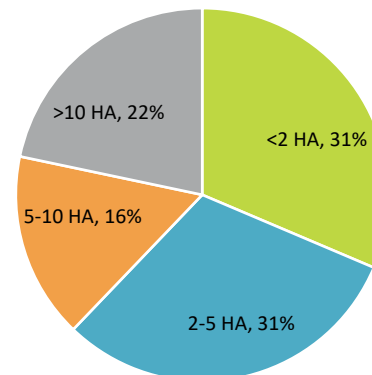
<sup>7</sup> Data quality on certified area, total group members and certified group members varies. These figures are merely indicative.

## COFFEE CERTIFIED AREA ANALYSIS<sup>8</sup>

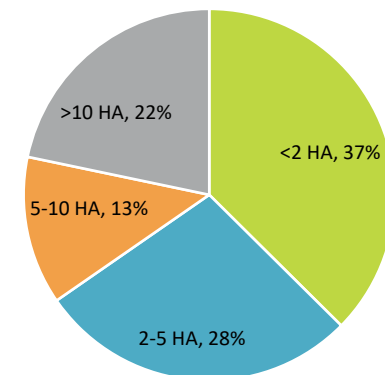
33% of coffee certified area is multiple certified, compared to 17% of certificates. The majority (67%) of multiple certified coffee certificates are groups with 62% of certificates posting an average of less than 5 hectares per producer. While the majority of group certificates have an average of less than 5 hectares per producer, the large estates included in some groups move the global average farm size to above 10 hectares per producer.



**MULTIPLE CERTIFIED GROUP CERTIFICATES**  
% Share of Coffee Group Certificates by Average Hectares (HA)/Producer - 2015



**NON-MULTIPLE CERTIFIED GROUP CERTIFICATES**  
% Share of Coffee Group Certificates by Average Hectares (HA)/Producer - 2015



<sup>8</sup> Data quality on certified area, total group members and certified group members varies. These figures are merely indicative.

## WHY OBTAIN MULTIPLE CERTIFICATIONS?

Producers become certified under more than one certification scheme for a variety of reasons, including to secure market access, to benefit from complementarities of different schemes, and to demonstrate intention to meet quality, social and environmental standards.

### Reasons coffee producers in Central America obtain multiple certifications<sup>9</sup>



<sup>9</sup> ISEAL Alliance (2018), Jason Donovan, Trent Blare (2018). Evaluation of UTZ certification focused on coffee businesses in Guatemala, Honduras and Nicaragua. World Agroforestry Centre (ICRAF)

# THE WAY FORWARD: ESTIMATING MULTIPLE CERTIFICATION

## DATA ON MULTIPLE CERTIFICATION PREVIOUSLY UNAVAILABLE

In the past, reporting on global totals of certified commodities has been difficult without good estimates of multiple certification. In order to circumvent this challenge and arrive at a number that could be used for improved understanding of the market, FiBL, IISD and ITC developed a calculation to estimate the amount of multiple certification. This approach takes the average of the minimum and maximum possible multiple certification levels to derive an estimate.

A monumental step forward, the agreement of ISEAL member schemes to share data at the certificate level has made more data than ever before available to analyse multiple certification in the coffee and cocoa sectors. Notwithstanding, inconsistent certificate holder naming, incomplete databases, and non-standardized reporting periods across ISEAL member schemes, among other factors, mean that multiple certification analysis remains a challenge.

## WHAT WE KNOW NOW

The FiBL-ITC-SSI multiple certification calculation is relatively comparable to the actual multiple certification figures for coffee and cocoa ISEAL members, when applied to *certified area*. It is not as comparable for other applications, like certificate holders or certified volume. The limitation of the FiBL-ITC-SSI calculation is that it is unable to account for the weighted variance between the size of groups, the average producer size and type of certificates. Still, given the high level of effort involved in compiling the ISEAL member database, and the fact that it does not include data on voluntary sustainability standards outside of the ISEAL membership base, the FiBL-ITC-SSI calculation appears to be a satisfactory proxy for gauging the global levels of multiple certification and assessing global market penetration. Using the calculation at a more granular level than the global aggregate would be discouraged, however, as it would likely lead to false assumptions.

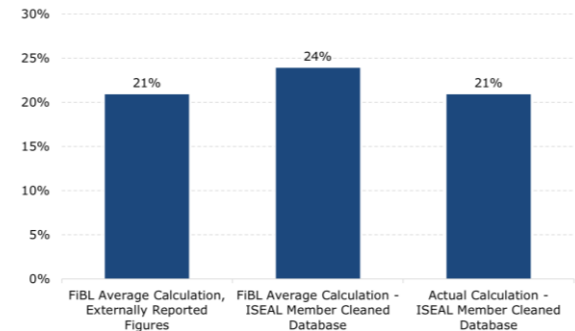
## MULTIPLE CERTIFICATION FIGURES STILL LIKELY OVER-REPORTED

Currently, ISEAL member schemes only record whether a group certificate includes multiple certified group members or not. There could be a group of 1,000 members that has only 200 multiple certified members, but the ISEAL member databases would assume that 100% of the area and volume of the entire group is multiple certified. This point conveys that, even though a better understanding of the level of multiple certification has been reached, there is a high likelihood that the figures presented here are still over-reported.

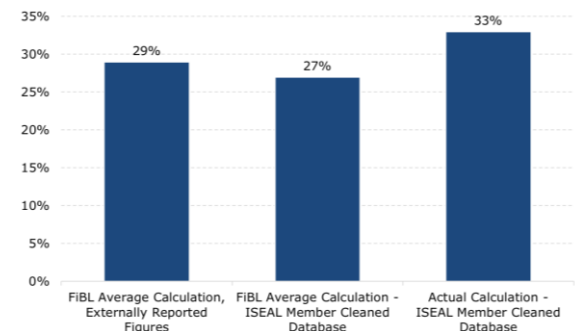
## LESSONS LEARNED – FAR BEYOND ON MULTIPLE CERTIFICATION

The exercise of aligning databases amongst ISEAL members to understand multiple certification proved to be a productive conduit for learnings at many levels, such as how to improve and align data collection, database management and reporting practices. The exercise itself created a shared understanding of the different approaches being used by ISEAL member schemes, which opens the door for new areas of collaboration and improved effectiveness going forward.

**COCOA: MULTIPLE CERTIFICATION CALCULATIONS COMPARED**  
% of Global Certified Area Multiple Certified - 2015  
Note: ISEAL Member Schemes Only



**COFFEE: MULTIPLE CERTIFICATION CALCULATIONS COMPARED**  
% of Global Certified Area Multiple Certified - 2015  
Note: ISEAL Member Schemes Only



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This report was prepared by Johanna Farrell (JJ Consulting) with inputs from Kristin Komives (ISEAL Alliance) and Aimee Russillo (LiSeed Consulting). For comments and feedback, please write to [kristin@isealalliance.org](mailto:kristin@isealalliance.org).



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#### **ISEAL Alliance**

The Green House  
244-254 Cambridge Heath Road  
London E2 9DA  
United Kingdom

+44 (0)20 3246 0066  
[info@isealalliance.org](mailto:info@isealalliance.org)  
[twitter.com/isealalliance](https://twitter.com/isealalliance)

[\*\*www.iseal.org\*\*](http://www.iseal.org)

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