



The Impact of Sustainability Certification on Market Access and Trade

Insights from the STAR4BBS Project for
Policymakers and Industry Stakeholders



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Introduction to Sustainability Certification Schemes and Labels (CSLs)

Sustainability certification schemes and labels (CSLs) are voluntary, market-based tools that help monitor and reduce environmental and socio-economic risks. They promote sustainable practices along global value chains and support EU strategies such as the Bioeconomy Strategy, the Circular Economy Action Plan, the EU Strategy on Standardisation, the European Green Deal, and related frameworks like the Ecodesign for Sustainable Products Regulation (ESPR) and the Corporate Sustainability Reporting Directive (CSRD).

CSLs enhance transparency and build trust among producers, consumers and policymakers. However, the rapid expansion of schemes has led to overlaps, gaps and inconsistent transparency, increasing costs and complexity. Stronger monitoring, harmonisation and alignment are needed to ensure credible and effective certification.

The [BIOBASEDCERT Monitoring Tool \(BMT\)](#), developed within the STAR4BBS project and BIOBASEDCERT cluster, provides a structured and transparent mechanism to benchmark CSLs against EU sustainability objectives, supporting harmonisation and continuous improvement.





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Benefits of sustainability certification

- Reduce environmental and social risks
- Facilitate access to high-value markets
- Build trust among producers, consumers and policymakers
- Support compliance with EU sustainability and circularity goals

Challenges of sustainability certification

- Overlapping and fragmented standards
- Gaps in coverage across sustainability dimensions
- Inconsistent transparency and monitoring
- Need for stronger harmonisation and alignment to ensure credibility





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Trade Flows of Biogenic Feedstocks — Key Highlights

Differences in how sustainability certification schemes are designed and applied shape international trade dynamics. Assessing where certified biogenic materials enter global markets provides valuable insight into their actual impact on EU trade.

The EU imports large volumes of biogenic feedstocks, such as cotton, wood, sugar cane and palm oil, primarily from a few key producer countries, including India, Brazil, the USA, Indonesia, China and Norway. These countries operate under very different production conditions and sustainability frameworks.

In addition to international certification schemes, many national and regional standards are in use but are not systematically captured, resulting in a fragmented and often opaque certification landscape. Because data on these systems are not harmonised or publicly available, it remains difficult to track and quantify certified versus non-certified material flows into the EU.





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Certified vs. Non-Certified Flows — Key Highlights

Feedstock	Estimated certified share (global, %)	Main certification schemes
Cotton	~33%	Better Cotton Initiative, Organic Cotton
Wood	5–10%	FSC, PEFC
Sugar cane	5–10%	Bonsucro, ISCC (< 0.5%)
Palm oil	15–20%	RSPO, ISCC
Rapeseed	~19%	ISCC
Sunflower	~2%	ISCC
Maize	~0.8%	ISCC
Wheat	~0.4%	ISCC
Sugar beet	<0.1%	ISCC

This table summarises the estimated global share of certified production for key biogenic feedstocks and highlights the main certification schemes currently in use.



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Impact of Sustainability CSLs on Market Access and Trade

CSLs play an increasingly important role in shaping global trade, although their impact on market access is complex and depends on economic, institutional and sectoral contexts. To better understand these effects, a systematic literature review was conducted, examining 563 studies, with 21 quantitative analyses selected for detailed assessment.

Key findings

- *Certification effects are not uniform: eight studies report positive trade impacts, four negative, and nine mixed or context-dependent results.*
- *Governance quality matters: trade effects depend on institutional strength, transparency, and support systems.*
- *Distribution of benefits is uneven — downstream actors capture a larger share of value than producers.*
- *For several commodities (e.g. palm oil, cocoa), certification has become a de facto requirement for market access.*
- *Smallholders face high barriers due to costs and administrative complexity.*





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Policy and Industry Recommendations

- Strengthen governance and institutional capacity through training, technical assistance and infrastructure support.
- Promote fair and transparent value chains with equitable sharing of certification costs and benefits.
- Provide targeted support for smallholders and SMEs through group certification models, financial assistance and digital traceability tools.
- Apply sector-specific approaches, recognising differences between commodities and value-chain structures.
- Improve data availability and interoperability to track certification trends and support evidence-based decision-making.
- Use the [BIOBASEDCERT Monitoring Tool \(BMT\)](#) as a cooperative benchmarking instrument to enhance harmonisation and continuous improvement across certification systems.



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