

15 CONCLUSION

Voluntary sustainability standards are, perhaps, the quintessential example of the green economy in action. On the one hand, they have the potential to enable more accurate full-cost accounting, while stimulating investment in newer, more efficient, “green” technologies. By leveraging existing supply chain infrastructures and relationships, sustainability standards hold the unique promise of more efficient, integrated approaches to sustainable development than those offered by traditional command-and-control policy measures.

The rapid growth in the number and market share of sustainability standards over the past decade is a vindication of the potential of such initiatives to bring about real and meaningful transformation across economic production. As sustainability standards find their way into the mainstream, they have the potential to set ground rules for entry into global markets, and, in so doing, “require” production to meet globally recognized standards for sustainable production.

The potential efficiency gains and regulatory power of voluntary standards suggests that they may offer one of the most accessible and wide-reaching vehicles for implementing sustainable development today. In light of this potential, there is a growing imperative to ensure that this opportunity is leveraged appropriately.

To date, voluntary sustainability standards have grown principally as a result of market forces. Whether motivated by environmental, labour, supply, reputational or other risks, sustainability standards have been driven by market imperative. Reliance on the market for their existence has resulted in the development of initiatives with a high degree of flexibility and pragmatism—hallmarks of the voluntary sector more generally. The basic features of market responsiveness and market ownership are key characteristics that allow standards to deliver beyond regulatory action alone.

But if the organic growth of sustainability standards allows them to move beyond regulatory regimes, they nevertheless face challenges by virtue of the imperfect nature of the markets within which they operate. Where the adoption of sustainable practices implies higher costs, the market will seek ways to avoid those costs by any variety of means including, at the limit, avoiding the adoption of such practices. Similarly, to the extent that the effectiveness of voluntary standards revolves around enabling more effective communication in the market place and the provision of such information represents a cost, the very premise upon which voluntary standards promise to operate may be threatened by market forces. Finally, even without considering the potential challenges created by market interests, it is a plain fact that voluntary standards have developed in an entirely unconstrained and open-ended environment. While this has helped foster innovation within the sustainability standards sector, it is also leading to reduced ability for clear market communication and strategic policy intervention. Based on our review, some of the more persistent “high-level” challenges facing the effective use of sustainability standards include:

Diversity of governance regimes: One accomplishment of voluntary standards to date has been the establishment of more accessible and inclusive governance regimes for select supply chain stakeholders across international borders. Where participatory governance is recognized as a pillar of sustainable development, this can be considered a key feature of sustainability standards. However, there is currently no clarity on how different governance regimes operate, nor procedures for ensuring that they recognize basic due process and democratic principles within them. Moreover, the combined outcome of “democratic” process with “market-based interests” remains deeply vulnerable to bias in the governance process in favour of organizations with significant market authority.

Inconsistency of conformity assessment systems: Our review has documented the many ways in which voluntary sustainability standards are improving the ability of supply chains to bring increasingly objective and reliable means for verifying the application of sustainable practices. However, our review has also documented a great diversity of approaches, including a high level of discretionary decision making. Meanwhile, the availability of information related to past and present audit processes related to specific production sites is typically not available. As with governance systems, there is a general lack of consistency in the application or understanding of conformity assessment processes.

Absence of trade and consumption data: Market data on initiatives are largely limited to data provided by standards bodies themselves. Limited budgets, as well as limited access to supply chain data by such organizations, reduce their ability to report on the broad spectrum of market data. At present, most available data tends to be limited to production data. There is a deep need for better trade and consumption data in order to gain a fuller understanding of the drivers and distribution of sustainable production and consumption.

Absence of impact data: Although the importance of field-level impact data is becoming increasingly recognized,¹ addressing the challenge remains monumental. The diversity of initiatives, combined with the diversity of production systems across any given initiative, points toward the need for common metrics as a starting point for understanding impacts. Common metrics need to be applied across a wide spectrum of producing regions, over time and with counterfactuals, to gain a meaningful understanding of

¹ In addition to growing investment to the Committee on Sustainability Assessment, the number of complementary multi-year, multi-country research programs are on the rise such as work being done on poverty reduction under the ISEAL Alliance and work recently completed by the Natural Resources Institute for DFID (during its most recent summit, members of the Sustainable Food Lab agreed that an aligned strategy for data collection among different private sector players was needed (D. Boselie, IDH, personal communication, December 15, 2013; see www.sustainablefoodlab.org).

Private/voluntary initiatives

The growing recognition of the role of voluntary sustainability standards as important instruments for implementing sustainable development has given rise to a number of voluntary NGO initiatives. These initiatives can provide important support and infrastructure to multilateral, intergovernmental approaches. Some leading initiatives include:

International Social and Environmental Accreditation and Labelling Alliance (ISEAL):

The ISEAL Alliance is an association of “mission oriented” voluntary sustainability standards that, in addition to providing a forum for collaboration and information exchange among sustainability standards organizations and other stakeholders, manages a series of “Codes of Good Practice” designed to set benchmarks and criteria for determining credible standard-setting and management processes. The ISEAL Alliance also facilitates data collection on impacts and other data parameters among its members. See <http://www.isealalliance.org/> for more information.

Committee on Sustainability Assessment (COSA):

The Committee on Sustainability Assessment is an independent grouping of researchers and development institutions that have come together to establish common methodologies and parameters for measuring field level impacts of sustainability standards and related supply chain initiatives. As of 2012, COSA had completed more than 15,000 field-level surveys compiling some million data points across its generic indicators. See <http://thecosa.org/> for more information.

Sustainable Commodity Assistance Network (SCAN):

The Sustainable Commodity Assistance Network is a grouping of standard-setting organizations and technical assistance organizations seeking to develop harmonized training tools and processes for streamlining smallholder entry into sustainable supply chains. As of 2012, SCAN had 17 members, including representatives from five standard-setting bodies, and operations in five countries. See <http://scanprogram.org/> for more information.

Sustainable Trade Initiative (IDH):

The Sustainable Trade Initiative is a global initiative founded by the Dutch Government aimed at stimulating private sector investment into sustainable supply chains through a matching funds model. IDH-associated projects totalled €49 million in 2012, applied to programs in 15 sectors. See <http://www.idhsustainabletrade.com/about-idh> for more information.

Finance Alliance for Sustainable Trade (FAST):

The Finance Alliance for Sustainable Trade is an association of financial service providers committed to providing loans and other investment to sustainable small and medium enterprises in the South. FAST focuses on streamlining access to finance by providing SME training, FAST Financial Fairs, and streamlining access to information on lender portfolios, as well as small and medium enterprise requests and performance over time. FAST members represented a total “green lending” activity of approximately US\$440 million in 2011. See <https://www.fastinternational.org/> for more information.

Multilateral/intergovernmental

Three intergovernmental initiatives are leading the way in building understanding among policy-makers at the multilateral level. These represent an important starting point for further action by the multilateral community.

International Trade Centre—Trade for Sustainable Development (ITC-T4SD):

The ITC manages a database of more than 100 voluntary sustainability standards. The database houses information related to the systems, governance and criteria of different standards as a means for improving private sector and policy-maker decision making related to voluntary sustainability standards. The ITC provides back-end services to, among others, the SSI, COSA, Kompas, and the Sustainability Standards Resource Center. See <http://www.standardsmap.org/> for more information.

Donors Network on Sustainability Standards (DNSS):

the Donors Network on Sustainability Standards is a group of more than 15 donor agencies with significant investments in sustainability standards and related supply chain initiatives. The objective of the Donors Network is to maximize impact of individual donor interventions through enhanced information exchange and collaboration. For more information, communication with the secretariat can be had through Christine Carey at christine.carey@iprolink.ch.

United Nations Forum on Sustainability Standards (UNFSS):

The United Nations Forum on Sustainability Standards is the only multilateral institution with an explicit mandate of facilitating discussion and strategic policy guidance related to voluntary sustainability standards. One of the core missions of the UNFSS is to provide developing country governments with an open space for expressing concerns and elaborating a positive agenda with respect to voluntary sustainability standards. See <http://unfss.org/> for more information.

the impacts of voluntary sustainability standards. Impacts need to be considered not only at the field level but also at the landscape, regional and global levels to ensure that standards are succeeding and prioritizing where sustainability issues are most pressing within any given sector and across sectors more generally. Achieving this objective will require considerable investment.

Promotion of positive poverty reduction impacts of voluntary sustainability standards: Although our review has not aimed at directly understanding field level impacts, it has revealed a clear concentration of standard-compliant production in more developed, export-oriented economies. To a large extent, this result is expected—one of the purported advantages of market-based instruments is their ability to select for the “most efficient” means of compliance. Clearly, producers that already comply with a given standard will be the least costly (i.e., most efficient) to certify. But this outcome also suggests the systemic challenge (and importance) of facilitating less-prepared producer entry into sustainable supply chains. Given the prominence of poverty reduction as a sustainability parameter in commodity production, the importance of ensuring appropriate access among less-developed sources of production is critical. Financing and technical assistance will be key inputs to facilitating access to sustainable markets among poorer producers. As sustainability standards become increasingly important determinants of the modes of production and trade, it becomes increasingly important to ensure that these and other gaps are addressed in a manner that promotes desired outcomes over the long term.

Although the voluntary sector has demonstrated a degree of capacity and interest in building more clarity in the sector through a number of leading meta-initiatives, and an innovative foundation has been laid at the multilateral level (see Box 15.1), there is still a general absence of coordinated engagement at the political level. Given that the most persistent information and rule-making gaps appear to be the result of market forces, there remains a specific role for greater public policy engagement in complementing these forces to ensure that they optimally serve the public good. This context provides the basic rationale for a more coordinated public policy approach to voluntary sustainability standards. Although the different roles and provisions of an “international framework on sustainability standards” warrant further independent investigation (not to mention political dialogue), based on our survey of the current landscape, some of the most immediate opportunities for public policy action include:

International framework on sustainability standards: Ad Hoc list of policy opportunities

1. Defining the sector:

Although various efforts have been made (*inter alia* through the SSI, ISEAL, COSA and the ITC) to define key performance characteristics within the sector, these have not, as of yet, received confirmation or adoption at the political level. Reaching agreed terminologies could

help forward political discussions toward increased predictability and the promotion of best practices within the sector. Some key areas where agreed definitions of different modalities and corresponding best practices include:

- a. Governance: Agreed definitions related to different governance structures and best practices for governance.
- b. Conformity assessment: Agreed definitions related to different conformity assessment systems and best practices for conformity assessment.
- c. Impacts: Agreed indicators and best practice methodologies for impact assessment.

2. Reporting rules/guidelines:

Access to information about the characteristics and performance of voluntary sustainability standards represents a key building block for more efficient market activity. Ensuring equitable opportunity across voluntary sustainability standard markets requires special attention to ensuring availability of information to less developed economies. Traditional and specialized market analysis services cannot provide accurate analysis where the data are fundamentally lacking. Some key areas where public policy could facilitate better analysis and strategic decision making related to voluntary sustainability standards include:

- a. Notifications on new standards and revisions to existing standards: Under the TBT Agreement, WTO member countries are obliged to provide notifications related to the development of non-governmental standards (TBT Code of Good Practice). Although private voluntary standards are typically not included within the ambit of TBT Agreement notifications, a more regular and prevalent notifications system for sustainability standards (either under the WTO or elsewhere) could facilitate more transparent operation of the market.
- b. Trade data: Most trade data relies on voluntary reporting from standards setters who themselves have only partial access to such data. Currently there is no system in place for gathering and reporting accurate trade data at the international level. In order to do so, some agreement on the appropriate international infrastructure will be required including, *inter alia*, the development of HST codes for “recognized” sustainability standards. A system similar to FAOStat could also be implemented.

3. Communications/claims guidelines and rules:

Voluntary sustainability standards revolve around the development and implementation of “credible” market claims related to sustainable practices. Different governance, conformity assessment and criteria can be expected to result in different impacts at the field, regional and global levels. Most national governments regulate claims made in the market to ensure honest and fair representation in a manner that promotes free and fair competition. Common definitions and reporting guidelines could help inform national policy design to promote fair competition.

- a. National packaging regulations: Integration of agreed definitions and possibly even impact assessment requirements into national packaging claims regulations could promote market predictability and efficiency at the international level.
- b. Application of competition policy: Most national competition policies prohibit false advertising. Agreed definitions and best practice guidelines could allow for more predictable and transparent judgments related to claims involving sustainability standards.

4. Technical assistance:

One of the pillars of a green economy relates to explicit efforts to stimulate investment in green production practices and related technologies. One of the enduring challenges associated with such efforts relates to the determinations on what could or should qualify as investment for a green economy. Moreover, evidence on current market trends within the voluntary sustainability standard sector suggests a need for more explicit investment in ensuring access for poorer rural producers. Common standards established at the multilateral level could help ensure technical assistance is linked to the most promising vehicles for sustainable development and those in most need.

- a. Eligibility requirements for accessing funds from national and international sources: International definitions could be used in setting national or international benchmarks for qualifying for technical assistance funds (for example, under “Aid for Trade,” “Global Environment Facility” or special dedicated sustainability standards technical assistance fund).
- b. Sustainability standards technical assistance fund: A multilateral framework outlining definitions and best practice could provide the requisite foundation for a dedicated facility for technical assistance associated with entering into credible, standards-based sustainable supply chains.

5. Tariff relief:

Although voluntary sustainability standards provide tools for correcting market imperfections, they must still operate in an imperfect market which may favour “unsustainable” production practices. Tariff relief offers a vehicle for levelling the playing field to counterbalance pressures from the market. Agreed definitions and best practices within the context of an international framework could also provide a foundation for distributing tariff relief for goods and services produced in compliance with recognized standards.

- a. Environmental goods and services: The 2001 Doha Ministerial declaration instructs WTO members to negotiate the reduction or elimination of tariff and non-tariff barriers for environmental goods and services. Acceptance of select products on such a list could be predicated on meeting certain internationally recognized governance, conformity assessment and/or reporting requirements.

- b. Green public procurement: Baseline rules for qualification as green public procurement could be established based on recognized governance, conformity assessment and/or reporting requirements.

The bullets above provide a high-level list of some areas where international consensus on best practices and corresponding policies could facilitate increased effectiveness in the use and implementation of voluntary standards.

Regardless of the specific items that might be included within such an international framework, it is clear that if the main assets of voluntary standards are to be preserved, any eventual public policy instruments will need to maintain sufficient flexibility to allow the market to operate freely and efficiently. With this in mind, public policy efforts are most likely to succeed to the extent they focus on roles related to ensuring *efficient operation of the market* through the promotion of more accurate, harmonized and credible communication related to initiatives within the marketplace. Following such an approach, progress toward an international framework could, arguably, offer voluntary sustainability standards the foundation that they need to deliver on their deepest sustainability promise—namely, the facilitation of market efficiency through improved market information.

Of course, public policy should not be considered a panacea for the sector either. The vibrancy of sustainability standards is deeply rooted in their ability to respond to individual perspectives and to leverage those perspectives towards innovation. The private sector, NGOs and standard setters themselves must, therefore, remain the *owners* of the development and implementation of sustainability standards. At the same time, private actors need to continue to take direct responsibility for the performance of such initiatives through ongoing monitoring, enforcement and continual improvement efforts.

At the end of the day, a shared vision implies shared responsibilities. In the words of Yeats, “in dreams begin responsibility.” The reverse is also true: recognizing our responsibilities, both public and private, will be the necessary foundation to realizing our dreams.

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APPENDIX I | SSI CONTENT CRITERIA INDICES AND INDICATORS

SSI Social Indices

1. **Community involvement:** Companies and supply chains draw from community resources while directly impacting community relations. As a result they also bear responsibility to the communities within which they operate. Increasingly, companies are attaching importance to communication with, loyalty to, and the involvement of, communities, in their own decision making. The SSI project monitors VSS criteria coverage for community involvement along the following categories:
 - a. **Community consultation:** Standard addresses consultation with the community regarding changes or impacts from business activities on local resources and communities;
 - b. **Local hiring and purchasing:** Standard includes criteria promoting preference policies for local hiring and purchasing.
2. **Employment benefits:** Employers seeking to ensure the long-term well-being of their employee base will often invest directly in additional nonwork-related benefits. The SSI project monitors the presence of criteria related to the following employment benefits:
 - a. **Paid leave** (sick/maternity and/or paternity): Standard includes criteria related to leave days, including maternity/paternity leave, as well as special leave days, including sickness, marriage, family leave;
 - b. **Pension and security benefits:** Standard addresses issues related to pensions and social security benefits.
3. **Employment conditions:** The conditions and treatment of employees is governed by employers. Poorer employees or those associated with minority groups may be subject to discrimination or inequitable treatment due to their unequal bargaining power or status among other employees. VSSs can play a role in ensuring fair working conditions and employer treatment through their rules processes. The SSI project's employee conditions index monitors VSS criteria coverage with respect to:
 - a. **Treatment of contract workers:** Standard addresses issues related to seasonal labour;
 - b. **Transparency of employment practices:** policies and practices are written, accessible and understandable to all workers; standard addresses employment conditions;
 - c. **Written contracts for employees** (rather than verbal agreements);
 - d. **Timely payment of wages:** Standard requires wage payment is made without delays;
 - e. **Maximum number of working hours:** Standard explicitly sets maximum number of working hours.
4. **Gender:** Gender equality and opportunity is recognized as a leading indicator of sustainable development and livelihoods. The SSI project monitors the existence and extent of obligations related to:
 - a. **Gender in governance:** The initiative promotes and monitors women in Board and management positions;
 - b. **Women's labour rights:** The initiative includes explicit criteria to protect women employees' rights (e.g., pregnancy testing);
 - c. **Women's health and safety:** The initiative includes explicit criteria for women employee health and safety issues.
5. **Health and safety:** Worker health and safety represents a core responsibility of employers and is directly linked to human well-being. VSS can monitor and enforce practices related to investments and protections for employee health and safety. The SSI project monitors criteria coverage on:
 - a. **Safety at work:** Standard addresses requirements for safety at work (ILO 184);
 - b. **Healthy work conditions:** Standard includes criteria relating to healthy work conditions;
 - c. **Access to safe drinking water:** Standard includes criteria relating to workers' access to safe drinking water;
 - d. **Access to sanitary facilities at work:** Standard includes criteria relating to sanitary facilities in the workplace;
 - e. **Access to medical assistance:** Standard addresses requirements for access to medical assistance/insurance in the workplace;
 - f. **Access to training:** Standard addresses requirements for worker training requirements.
6. **Human rights:** The United Nations Declaration on Human Rights (UNDHR) sets the foundation for internationally recognized human rights. The SSI project tracks key themes contained within the UNDHR by tracking the degree of obligation to protect rights to:
 - a. **Education:** Standard includes criteria related to the promotion/enhancement of education;
 - b. **Housing and sanitary facilities:** Standard includes criteria related to housing and sanitary facilities;
 - c. **Medical care:** Standard includes criteria related to the promotion/enhancement of medical care.
7. **Humane treatment of animals:** The humane treatment of living and/or sentient creatures is commonly regarded as a human ethical responsibility with implications for the health and well-being of society more generally. The SSI project monitors criteria coverage related to:

a. **The humane treatment of animals**

8. **Labour rights:** ILO Core 8 convention requirements are explicitly written into organizational documents: #29-Forced Labour (1930), #87-Freedom of Association and Protection of the Right to Organize (1948), #98-Right to Organize and Collective Bargaining (1949), #105-Abolition of Forced Labour (1959), #138-Minimum Age (1973), #182-Worst Forms of Child Labour (1999), #100-Equal Remuneration (1951), and #111-Discrimination (1958). The SSI project tracks VSS criteria coverage on the following issues:
 - a. **Equal remuneration:** Standard includes criteria related to equal remuneration, as defined by ILO 100;
 - b. **Freedom of association:** Standard includes criteria related to freedom of association, as defined by ILO 87;
 - c. **Collective bargaining:** Standard includes criteria related to collective bargaining, as defined by ILO 98;
 - d. **Non-discrimination:** No discrimination due to race, religion, social, cultural, age, gender or other factor, as defined by ILO 111;
 - e. **Worst forms of child labour:** As defined by ILO 182;
 - f. **Forced labour:** Standard prohibits use of forced labour, as defined by ILO 29;
 - g. **Minimum age:** Standard sets a minimum age for workers with ILO 138 as minimum threshold.

SSI Environmental Indices

1. **Soil:** Soil is a key environmental resource of agricultural systems and ecosystems. The SSI Soil Index records criteria coverage with respect to:
 - a. **Soil conservation (erosion prevention):** Management plan and practices to conserve soil and avoid soil loss through erosion, such as contour ploughing and reforestation;
 - b. **Soil quality maintenance:** Soil quality reflects how well a soil performs the functions of maintaining biodiversity and productivity, partitioning water and solute flow, filtering and buffering, nutrient cycling, and providing support for plants and other structures.
2. **Biodiversity:** Biodiversity has long been recognized by the international community as a key variable in ensuring ecosystem resilience and integrity. Drawing from the framework of the Convention on Biological Diversity, the SSI Biodiversity index monitors criteria coverage with respect to:
 - a. **Habitat set-asides:** Standard document requires areas not to be used for production/extraction in order to conserve, protect and restore habitat areas for wild plants and animals;
 - b. **Flora densities/diversity:** Standard document addresses plant genetic density (space) and diversity;
 - c. **Land conversion:** Standard document prohibits conversion of high conservation value land.
3. **Genetically modified organism prohibition:** Although the use of Genetically Modified Organisms (GMOs) in agricultural production remains an issue of considerable controversy from a sustainable development perspective, consumers and other stakeholders have displayed strong positions either in favour of, or against, the use of GMOs in production. At the same time, the

inclusion of GMO-related criteria within a VSS can have wide-reaching impacts on the supply chain. As a result, the SSI project monitors criteria coverage with respect to:

- a. **Prohibition of genetically modified organisms**
4. **Waste:** Waste production from primary production and industrial processes represents a major source of environmental pressure in many product and commodity supply chains. The SSI Waste Index monitors criteria coverage with respect to:
 - a. **Waste disposal:** Standard addresses disposal of waste (including solid waste, non-solid waste, hazardous waste...);
 - b. **Waste management:** Includes the control of the collection and treatment of different wastes;
 - c. **Pollution:** Minimizing the introduction of contaminants into an environment that would cause instability, disorder, harm or discomfort to the ecosystem in the form of chemical substances, or energy, such as noise, heat or light.
5. **Water:** Water is a major resource for agricultural production, ecosystem sustainability and human well-being. The SSI Water Index measures the existence of criteria related to the following categories:
 - a. **Water practices in scarcity (dependencies):** Requirement to address water use in areas of scarcity or high risk;
 - b. **Water use management plan:** Requirement of a plan that includes planning, developing, distributing and optimal use of water resources under defined management strategies;
 - c. **Water reduction criteria:** Water conservation management plan to reduce water use;
 - d. **Wastewater disposal:** Requirement of appropriate wastewater disposal.
6. **Energy:** Energy use can affect waste generation more generally, as well as climate change-related impacts of production. The SSI Energy Index monitors the existence and degree of criteria related to:
 - a. **Energy use and management:** Criteria relating to the application of a set of “clean production principles”;
 - b. **Energy reduction:** Standard addresses issues related to reducing energy use.
7. **Greenhouse gas:** Greenhouse gas (GHG) reduction and management is a core strategy for reducing global pressures on climate change. The SSI project tracks criteria coverage related to:
 - a. **Greenhouse gas accounting:** requirement to measure carbon emissions;
 - b. **Greenhouse gas reductions:** requirement to manage greenhouse gas emissions;
 - c. **Soil carbon sequestration:** Standard includes a general principle on the sequestration of greenhouse gases.
8. **Synthetic inputs:** Synthetic inputs can have important implications for energy use, waste generation, worker health and ecosystem health. As a general rule, good agricultural practices prescribe methods for ensuring that the potentially negative impacts arising from the use of synthetic chemicals are minimized. The SSI project monitors the level of constraint

placed on the use of synthetic according to the following categories:

- a. **Integrated pest management:** Synthetic inputs may be used but within defined limits under an IPM system;
- b. **Enforcement of a prohibited list:** Synthetic inputs are allowed but only those that do not appear on a list of prohibited materials;
- c. **Complete prohibition of synthetics:** No synthetic inputs may be used.

SSI Economic Criteria

1. **Living wage:** The Standard requires minimum levels of wages that cover basic human needs, as defined locally by public authorities;
2. **Minimum wage:** Requirements related to compliance with local minimum wage laws as defined by local, regional or national law—must be paid to workers in certified / verified operations;
3. **Premiums:** As part of the standard, a premium over the conventional price of the product is required for the producer;
4. **Product quality requirements:** Specifications for minimum physical product quality are explicit within standard document;
5. **Written contracts between buyers and sellers:** Criteria for setting up contracts with traders.

APPENDIX II | THE SSI INDICATORS AND DEFINITIONS

The following table lists the core indicators—characteristics and vital statistics of voluntary sustainability initiatives—that the State of Sustainability Initiatives project seeks to monitor on a regular basis. The definitions below provide high-level descriptions of each indicator. The non-market indicators in the list are also found within the International Trade Centre's T4SD (Trade for Sustainable Development) database.

Systems information indicators can be found within the text and tables of Sections 1.0 and 2.0 of this report, while market indicator data can be found in the commodity-specific market subsections of Section 3.0.

INDICATOR NAME DEFINITIONS/DESCRIPTIONS

GENERAL INFORMATION

Activities monitored	<p>The activities that the organization oversees in one of the following categories:</p> <p>Production/extraction: Standard system coverage is limited to the first stage of the supply chain and primary products: changing or extraction of natural resources into primary products including agriculture, forestry, mining, petroleum, hunting and fishing.</p> <p>Conversion: The standard system focuses on the next stage of the supply chain, taking raw materials and natural resources as inputs for conversion or processing into a higher value product.</p> <p>Trade and retailing: The standard system focuses on the purchase and sale of the product to an end consumer.</p> <p>Chain of Custody: The standard system focuses on Chain of Custody: documentation of product control, transfer and processing throughout the supply chain.</p> <p>Communication claims/labelling: The standard system coverage focuses on verifying claims and labelling.</p>
Geographic restriction	The geographic scope of the initiative. If the organization operates on a global level, the geographic restriction is classified as “unrestricted.” If the organization operates only within one region or country, the geographic region is identified.
Industry restriction	Identification of the industries to which the initiative pertains. If the organization operates across a range of industries, it is classified as “unrestricted.” If the organization specifically operates only within one industry, such as forestry, it is classified as “restricted.” This category also refers to potential industries, not only the current industry for which a standard has been developed.
Legal form of organization	Either profit or not-for-profit. In a for-profit organization, the profits that are not re-invested in the organization are distributed to the owners/shareholders of the corporation as cash. In the case of a non-profit organization, the profits are used to provide goods or services to the group or groups the non-profit was formed to help. A for-profit is legally owned and controlled by the investors, where a not-for profit has no legal owners.
Main activities	<p>Defines the main activities of the organization in the following subcategories:</p> <p>Standard setting: The initiative develops a standard that sets requirements to be followed by program participants (e.g., Fairtrade).</p> <p>Certification: The organization acts as a third party and gives written assurance that a product, process or service is in conformity with certain standards (e.g., ProTerra).</p> <p>Accreditation: The organization acts as an authoritative body that evaluates and formally recognizes a certification program (e.g., IFOAM).</p> <p>Marketing and labelling: The primary business of the organization is marketing and/or labelling (e.g., Rainforest Alliance).</p>
Organization type	The type of the sustainability initiative is private or public. A public organization is an organization that has been established and has a mandate set out in law as a government or intergovernmental body. A private organization is any organization that does not fall into one of those categories.
Percentage of expenditures for administration	The percentage of total annual expenditures used for administrative purposes, as reported on legal tax documents.

Performance-based standard	Standard criteria are results based or performance criteria, (e.g. water use reduction by 10% per year over 5 years) (T4SD).
Process-based standard	Standard includes criteria based on production processes, also known as compliance or management system criteria, (e.g., water management plan); they do not set performance criteria based on results to be reached (T4SD).
Product standard	Standard that specifies requirements to be fulfilled by a product or a group of products, to establish its fitness for purpose. Note 1: A product standard may include in addition to the fitness for purpose requirements, directly or by reference, aspects such as terminology, sampling, testing, packaging and labelling and, sometimes, processing requirements (ISO/IEC Guide 2:2004).
Standard system type	Identification of the coverage of an organization into one of the following categories: Generic system: The initiative is not limited to any particular product or process. The criteria/indicators remain the same for all products/processes. Integrated system: The initiative can certify an entire enterprise as a system. There are different criteria/indicators for each product/process. Product/process-specific: The initiative pertains to one or more products or processes.
Target constituent focus	The constituent focus provides an indication of the target of the initiative (individual, group or cooperative).
Target constituent size	Identification of whether the initiative's target constituents are microenterprises/businesses, small and medium sized enterprises, or large multinational enterprises/businesses. Categories were defined through local thresholds based on various factors, including sales and number of employees.
Total annual expenditures	The total amount of money that the initiative spends during one fiscal year.
Total annual income	The organization's annual budget. The total annual income is calculated by adding the annual income brought in by grants, membership fees, services and other income sources (before tax deductions).

SYSTEMS INDICATORS

Accreditation	Third-party attestation related to a conformity assessment body conveying formal demonstration of its competence to carry out specific conformity assessment tasks (ISO/IEC 17000).
Administration expenditure	The percentage of total annual expenditures used for administrative purposes as reported on legal tax documents.
Audit	A systematic and functionally independent examination to determine whether activities and related results comply with planned objectives (FAO).
Audit costs	The examination costs incurred from internal auditors and/or independent auditors visiting the site to determine whether activities and related results comply with planned objectives.
Audit sampling method	Percentage or formula for calculating the number of sites, producers or businesses within a group that must be physically audited in any given assessment.
Board member selection	Board members selected by stakeholders/individuals and institutions interested and involved in the initiative, recognized members of the initiative, established board members, or other stakeholders.
Board representation by region	Percentage of total board members who are from developed countries or developing countries.
Board representation by type	Percentage of total board members who represent producers, who are part of the industry or private sector (e.g., traders), who represent workers' associations or unions, who belong to a civil society organization and/or who are fall under the category of other (consultants, lawyers, financial institutions).
Certification audit	Third party attestation related to products, processes, systems or persons (ISO 9000/2005).
Certification fee	Costs made by the body certifying a producer group.
Chain of Custody	Documentation of product control, transfer and processing throughout the supply chain.

CoC model	<p>CoC model based on:</p> <p>Identity preservation: The identity preservation model requires physical separation, tracking and documentation at every stage of the supply chain.</p> <p>Segregation: The segregation model ensures that compliant products are kept segregated from non-compliant products during all stages of the supply chain.</p> <p>Mass balance: The amount of certified product sourced and sold by each supply chain actor is tracked. However, the certified product and “sustainable” certificates do not need to be sold together (for example, FSC mixed sources).</p> <p>Book and claim: “Sustainable” certificate granted based on the application of sustainable practices, but certificate is completely decoupled from the product and transferable on the market.</p>
Code of Conduct	Guidelines advising stakeholders on how to behave in an environmentally responsible manner. Recommended practices based on a system of self-regulation intended to promote environmentally and/or socio-culturally sustainable behaviour (GRDC).
Complaints-related indicators	<p>Public access to policy and procedures for complaints on certification decisions. Complaint procedures made available in a local language.</p> <p>Ability to launch complaints at local level (processes in place that enable complaints to be received through informal channels that take into consideration language and/or literacy barriers or lower access to formal means of communication).</p> <p>Acceptance of complaints launched by informal means (processes in place that enable complaints to be addressed regardless of language and/or literacy barriers or lower access to formal means of communication).</p>
Conformity assessment	Any activity concerned with determining directly or indirectly that relevant requirements are fulfilled. Note: typical examples of conformity assessment activities are sampling, testing and inspection; evaluation, verification and assurance of conformity (supplier’s declaration, certification); registration, accreditation and approval as well as their combinations (ISO Guide 2, 12.2).
Continual improvement requirement	A defined continual improvement requirement is explicitly written into organizational documents.
Criteria	The standards, measures or expectations used in making an evaluation and/or verification (TSPN).
Disadvantaged or vulnerable groups	Individuals or groups within the project area of influence who could experience adverse impacts from the proposed project more severely than others based on their vulnerable or disadvantaged status. This status may stem from an individual’s or group’s race, colour, sex, language, religion, political, or other opinion, national or social origin, property, birth or other status. In addition, other factors should be considered such as gender, ethnicity, culture, sickness, physical or mental disability, poverty or economic disadvantage, and dependence on unique natural resources (IFC).
Distribution of income	<p>Public grants: The percentage of total income from public grants and donations, including loans (e.g., soft loans at low interest rates).</p> <p>Private grants: The percentage of total income from private grants and donations.</p> <p>Other: The percentage of total income brought in by other income sources (i.e., other than grants, membership fees, services or government).</p> <p>Membership fees: The percentage of total income brought in by membership fees.</p> <p>Fees and services: The percentage of total income from fees for services.</p>
Externally managed funds	Funds that are managed and implemented by another organization.
Formal monitoring and evaluation system	The initiative adheres to an accredited standard’s M&E systems, such as those defined by ISO or ISEAL.
Frequency of audits	Frequency of full assessment as required by standard.
Independent dispute settlement body	A dispute settlement body that is not made up of the organization’s board members has been established and formally recognized in writing.

Independent evaluator	An evaluation carried out by entities and persons free of the control of those responsible for the design and implementation of the development intervention. Note: The credibility of an evaluation depends in part on how independently it has been carried out. Independence implies freedom from political influence and organizational pressure. It is characterized by full access to information and by full autonomy in carrying out investigations and reporting findings (OECD, 2000).
Indicator	The measure that is used to demonstrate the change or the result of a programme (OECD, 2000).
ISEAL's Impacts Code	Specifies general requirements for the development and implementation of monitoring and evaluation programs by social and environmental standards systems.
ISO 17065	ISO 17065, replacing ISO 65 in 2012, sets quality and independence requirements for certification bodies, and offers an internationally recognized instrument for assessing the strength of the conformity assessment process.
ISO 17021	ISO 17021 sets requirements for bodies providing audit and certification of management systems. It is the base standard used by accreditation bodies when assessing the competence of management systems certification bodies. It replaced two previous ISO/CASCO Guides (ISO/IEC Guide 62 and ISO/IEC Guide 66) (ISO, n.d.-a).
Licensing fee	Fees paid by retailers and/or other supply chain actors in order to make on package or product claims of supply chain compliance with the initiative.
Local auditors engaged in the verification process	Initiatives draw on expertise of local auditors who are familiar with local contexts for verification process.
Localized indicators	Initiative allows for adaption of indicators to local contexts.
Membership fee	Costs incurred to members for participatory rights, services and discounts associated with membership within the initiative.
Monitoring	A management function that uses a methodical collection of data to determine whether the material and financial resources are sufficient, whether the people in charge have the necessary technical and personal qualifications, whether activities conform to work plans, and whether the work plan has been achieved and has produced the original objectives (OECD, 2000).
Non-recurring revenue	Income of an infrequent nature unlikely to occur again in the normal course of business, such as grants/donations.
Outcome	Results of a program or project relative to its immediate objectives that are generated by the program or project outputs. Examples: increased rice yield, increased income for the farmers (UNDP-defined under "results": OECD, 2000).
Percentage of content requirements	Percentage of compliant product to be included in finished package for labelled product—necessary for the product to be labelled compliant—is specifically set out in the standard.
Producer fee	Registration fee that is typically paid according to certificate cycle
Public disclosure indicators	Public access to lists of decision-makers including Board members and Committee members, lists of certified enterprises, and complaints/appeals/resolutions/certification decisions. Additional components include minutes of Board and committee meetings available online or upon request, and public access to important documents such as financial statements and annual reports. List of Board members: Lists of decision-makers including Board members available online. List of committee members: Lists of decision-makers including Committee members available online. List of compliant enterprises: Lists of certified / verified enterprises available online. Certification decisions: Decisions made on certification audits available online. Meeting minutes and records: Minutes of Board and committee meetings available online. Standard setting and review procedures: Procedures on standard setting and review of standards available online. Independently audited full financial statements: Online access to financial statements that have been independently audited. Annual report: Online access to the organization's annual reports.
Random field checks / surprise audits	Auditor visits the producer to verify and monitor the ongoing fulfillment of the standards and to identify any corrective actions necessary to maintain compliance.

Recurring revenue	Segment of an organization's revenue that occurs frequently, regularly or periodically, such as membership fees. This is revenue that is predictable and relied upon in the future with a high degree of certainty.
Regional standard development	Initiative allows for adaption of standards to regional contexts.
Relationship to ISEAL	The initiative is a full or associate ISEAL member (including compliance with the ISEAL Impacts Code).
Self-assessment	The execution of an audit by the administrative unit being audited (internal audit as defined by OECD).
Separate Chain of Custody	Adherence to separate standard that defines the principles, criteria and (CoC) standard indicators for CoC.
Scope of CoC requirements	Scope of CoC requirements based on: Traceability: CoC requirements ONLY address traceability of product within supply chain. Environmental: CoC standard contains environmental criteria for supply chain actors, such as energy use, water use and carbon emissions. Social: CoC standard contains social criteria for supply chain actors, such as labour rights, human rights, and local community issues.
Separate standards and/or processes for smallholders	Standards and/or processes have been written specifically for smallholders and differ from the standards/processes for large producers.
Stakeholder	Individuals, groups of individuals or organizations that affect and/or could be affected by a standards systems' activities, products, services or associated performance (ISEAL).
Stakeholder participation on Boards and committees	Stakeholders are asked their opinions on decisions made by boards and committees.
Stakeholder participation in dispute resolution	Level of participation in dispute resolution Consultation: Stakeholders are asked their opinions pertaining to dispute resolution. Decision-making: Stakeholders have the power to reject/accept/influence the decisions made during the dispute resolution process.
Stakeholder participation in standard development	Level of participation in standard development Consultation: Stakeholders are asked their opinions pertaining to standard development. Decision-making: Stakeholders have the power to reject/accept/influence the decisions made during the standard development process.
Supply chain	Sequence of activities and/or parties that provides products or services to the receiving organization. In a supply chain, different production processes can be distinguished. Quality assurance of the final product requires that all previous production processes in a chain be certified (HIVOS).
Surveillance audit	Auditor visits the producer to verify and monitor the ongoing fulfillment of the standards and to identify any corrective actions necessary to maintain compliance.
Types of conformity assessment	The types of audits required by the initiative to ensure continuous compliance within the certificate/verification validity time period as well as for complete reassessment.
Verification audit	Confirmation through the provision of objective evidence that specified requirements have been fulfilled (ISO 9000/2005).
Voting members	Members of the organization who vote at the AGM.
Voting member constituency	Individuals and/or groups to which voting membership is open.

MARKET INDICATORS

Production volume ("production")	Production volume that is VSS-compliant, even if not sold as compliant at the first point of sale.
Production volume sold ("sales")	Volume of VSS-compliant product that is sold as compliant at the first point of sale (e.g., from cooperative to trader).
Production value	Value of VSS-compliant product that is sold as compliant at the first point of sale (i.e., total producer revenues from compliant product).

Production market share - value	VSS-compliant production value as a percentage of global production value.
Production market share - volume	VSS-compliant production volume as a percentage of global production volume.
Area fully converted ("area harvested")	Total hectareage of land on which VSS-compliant product is produced; this refers to area actually being cultivated, not total farm area.
Area under conversion	Total hectareage of land that is in the process of being converted for VSS-compliant production; this refers to areas actually being cultivated, not total farm area.
Yield	Yield in volume per hectare of VSS-compliant production.
Number of enterprises and producers / operators covered by the standard	Total number of enterprises and individual producers or operators meeting requirements of the standard. This includes the producers/operators organized under a group, resource manager, community, or cooperative certificate, and/or those producing, collecting, or gathering for a supply chain covered by a standard.
Number of farmers in small producer organization ("smallholders")	Total number of farms organized into certified SPO production units - production unit defined as: operating under a single management for the purpose of producing agricultural product (Eurostat definition); Small Producer Organization (SPO): The majority of the members of the organization must be smallholders who don't depend on hired workers all the time, but run their farm mainly by using their own and their family's labour.
Number of full and part-time employees covered by the standard	Number of full-time / part-time employees of the certificate holder and all enterprises or individual farms, operators, etc., covered by the standard, disaggregated by gender. Report maximum number during year. Exclude family labour. Full-time employees work year round and typically work 35-50 hours per week. If local definitions of full-time equivalency differ, use appropriate standard. Part-time employees work year round but do not meet full-time equivalency standards (typically less than 35 hours a week).
Number of hired temporary workers covered by the standard	Number of temporary hired workers working for certificate holder and all enterprises or individual farms, operators, etc. covered by the standard. Temporary workers are defined as seasonal, contract, and/or migrant workers. Seasonal and migrant workers are primarily used in agriculture or fisheries. Contracted workers are generally hired for the completion of a specific task.
Export volume	Volume of VSS-compliant product that is exported, excluding the volume of compliant product exported as conventional produce.
Export value	Value of VSS-compliant product that is exported, excluding the value of compliant product exported as conventional product.
Export market share - value	VSS-compliant export value as a percentage of global exports.
Export market share - volume	VSS-compliant export volume as a percentage of global exports.
Import volume	VSS-compliant import volume.
Import value	VSS-compliant import value.
Import market share - value	VSS-compliant import value as a percentage of global imports.
Import market share - volume	VSS-compliant import volume as a percentage of global imports.
Multiple certification - production	Percentage of VSS-compliant production that is compliant under more than one VSS; if an actual measurement is not available, an estimate will be accepted so long as it is specified as an estimate.
Multiple certification - area harvested	Percentage of VSS-compliant area harvested that is compliant under more than one VSS; if an actual measurement is not available, an estimate will be accepted so long as it is specified as an estimate.
Multiple certification - production volume sold	Percentage of compliant production volume sold that is compliant under more than one VSS; if an actual measurement is not available, an estimate will be accepted so long as it is specified as an estimate.
Multiple certification - trade	Percentage of compliant trade that is compliant under more than one VSS; if an actual measurement is not available, an estimate will be accepted so long as it is specified as an estimate.

Multiple certification - producers	Percentage of compliant producers that are compliant under more than one VSS; if an actual measurement is not available, an estimate will be accepted so long as it is specified as an estimate.
Farm gate /Business gate prices	The farm gate/business gate price per product unit of the VSS-compliant product. If the price is not recorded in USD or Euros, the exchange should be calculated using oanda.com 's exchange rate from the date on which the report was released.
Reported premiums	Estimated additional dollar value per volume paid for VSS-compliant product at farm gate and strictly on account of certification (i.e., not for physical quality differences).
Certification fees	The explicit fees of a VSS-compliant product, per product unit, calculated across the entire certification scheme (i.e., Total certification costs received/charged + estimated auditing costs for the full assessment/ total traded volume).
Number of operators (exporters)	The number of natural or legal person within the Community who exports to a third country sustainably compliant products with a view to the subsequent marketing.
Number of operators (importers)	The number of natural or legal persons within the Community who presents a consignment for release for free circulation into the Community, either in person, or through a representative.
Number of operators (processors)	Number of operators who preserve and/or process sustainably compliant agricultural products (incl. Slaughtering and butchering) and aquaculture products; Packaging and labelling as VSS-compliant is also considered as processing.
Major private sector purchasers	Amount of product currently being sourced (regardless of conventional/VSS-compliant status).
Private sector sustainable sourcing volume	Amount of VSS-compliant product purchases.
Private sector sustainable sourcing percentage	Amount of VSS-compliant product purchases as a percentage of total purchases.
Private sector commitment to sustainable sourcing	Percentage of purchases that companies commit to source as VSS-compliant, and date by which commitment will be fulfilled.
Retail sales volume	VSS-compliant retail sales volume.
Retail sales value	VSS-compliant retail sales value.
Retail sales market share - value	Share of VSS-compliant sales value as a percentage of global sales value.
Retail sales market share - volume	Share of VSS-compliant sales volume as a percentage of global sales volume.

APPENDIX III | VSS LABELLING POLICIES¹

VSS	Policy for labelling claims	Policy for single products	Policy for composite products ²	Explicit policies regarding content requirements for labelling
4C Association	✓	✓		When referring to a specific coffee as “4C Coffee,” it has to be 100% 4C compliant coffee. Claims to this effect can only be made with the approval of the 4C Secretariat and must be approved by verifiable traceability mechanisms.
BCI	✓			100% of the product must be certified.
Bonsucro	✓	✓	✓	Policy for both single and composite products: a. In case the product contains at least 90% of certified sugar cane (segregation): The sugar in this product is responsibly produced. b. In case the product contains at least 30% of certified sugar cane (mass balance of segregation): The percentage of sugar in the product that comes from mixed responsible sources is to be defined, along with the percentage of commitment for responsible sourcing by specified target year.
CmiA	✓			No percentage requirements (ITC, 2013b). Cotton sold under the Cotton made in Africa (CmiA) label will remain entirely free of genetically modified plants (CmiA, 2012b).
ETP ³	✓			100% of the tea within a pack has to come from estates engaged in ETP’s monitoring programme. 100% of the tea (<i>Camellia sinensis</i>) must be from ETP monitored estates. The use of the logo can only be used on products that contain at least 55% <i>C. sinensis</i> by weight.
Fairtrade	✓	✓	✓	Single products: In the case of single ingredient products like coffee, 100% of the coffee must be Fairtrade certified to carry the label. Composite products: At least 50% of the volume of liquid composite products must be Fairtrade certified. For all other composite products the significant ingredient (for example cocoa in chocolate, sugar in conserves) must be Fairtrade certified, and must be at least 20% of the products’ dry weight.

¹ All information extracted from ITC Standard Map (ITC, 2013b) unless otherwise specified.

² Composite products refer to products containing multiple ingredients.

³ Information provided directly to SSI from ETP.

VSS	Policy for labelling claims	Policy for single products	Policy for composite products ²	Explicit policies regarding content requirements for labelling
FSC ⁴	✓	✓	✓	<p>Single products: There are three categories of FSC labels and five possible variations of the on-product claim:</p> <p>A) 'FSC-pure label': Product groups manufactured with 100% FSC certified material.</p> <p>B) 'FSC-mixed label': Variation i. Mixed sources: Product groups from well managed forests and other controlled sources. Variation ii. Mixed sources: Product groups from well managed forests, controlled sources and recycled wood or fiber. Variation iii. Mixed sources: Product groups from well managed forests and recycled wood or fiber.</p> <p>C) 'FSC-recycled label': Product groups manufactured with 100% recycled content.</p> <p>Composite products: There are three categories of FSC labels and five possible variations of the on-product claim:</p> <p>A) 'FSC-pure label': Product groups manufactured with 100% FSC certified material.</p> <p>B) 'FSC-mixed label': Variation i. Mixed sources: Product groups from well managed forests and other controlled sources. Variation ii. Mixed sources: Product groups from well managed forests, controlled sources and recycled wood or fiber. Variation iii. Mixed sources: Product groups from well managed forests and recycled wood or fiber.</p> <p>C) 'FSC-recycled label': Product groups manufactured with 100% recycled content.</p>
GLOBALG.A.P.	✓			
IFOAM	✓	✓	✓	<p>Single products: Processed products shall be labeled according to the following minimum requirements:</p> <p>a. Where 95 to 100% of the ingredients (by weight) are organic, the product may be labeled as "organic."</p> <p>Composite products: Where less than 95% but not less than 70% of the ingredients (by weight) are organic, these product cannot be labeled as "organic," but phrases such as "made with organic ingredients" can be used, provided the proportion of organic ingredients is clearly stated. c. Where less than 70% of the ingredients (by weight) are organic, the product cannot be labeled as "organic."</p>

4 Information provided directly to SSI from FSC.

VSS	Policy for labelling claims	Policy for single products	Policy for composite products ²	Explicit policies regarding content requirements for labelling
PEFC	✓	✓	✓	<p>Single products: No minimum requirement: The percentage that indicates the content of the PEFC certified raw material in the product can be used as a part of the “PEFC certified” label.</p> <p>Composite products: No minimum requirement: The percentage that indicates the content of the PEFC certified raw material in the product can be used as a part of the “PEFC certified” label.</p>
ProTerra	✓			
RSB	✓	✓	✓	<p>Single and composite products: Participating operators that use the claim defined in 3.1.1. for their off-product communication shall provide to the public, upon request, the following information: 3. 3. 1. The RSB compliant product as a portion of the total product handled by the participating operator, [i.e., x% of the total product handled by the participating operators complies with the RSB standards] 3. 3. 2. The portion of the RSB compliant products as a percentage of total biomass/biofuel products handled (i.e., portion of the RSB compliant products in relation to biomass/biofuel products that were not compliant with the RSB standards or that have not been evaluated for compliance with RSB standards).</p>
RSPO	✓	✓	✓	<p>Single product: At least 95% (for Identify Preserved (IP), Segregated (SG) and Mass Balance (MB)).</p> <p>Composite product: % content must be specified.</p>
RTRS	✓			

VSS	Policy for labelling claims	Policy for single products	Policy for composite products ²	Explicit policies regarding content requirements for labelling
SAN/RA	✓	✓	✓	<p>Single products: Single ingredient products must contain a minimum of 30% Rainforest Alliance Certified™ content in order to bear the seal on product packaging, though these products must include a qualifying statement on pack that discloses the percentage of certified content. Companies requesting to use the RAC seal on single ingredient products with less than 90% certified content must also agree to scale up the percentage of certified content over time with specific benchmarks and timelines (see http://www.rainforest-alliance.org/sites/default/files/site-documents/marketing/seal-guidelines-agriculture.pdf).</p> <p>Composite products: 100% of the named core ingredient is sourced from certified farms, and the final product contains at least 90% certified content for that ingredient. This is the recommended and most straightforward way to use the RAC seal on a composite product, and it requires no special disclaimers on the package (see Section 3). – OR –</p> <p>B. MINIMUM CERTIFIED CONTENT WITH SCALE UP PLAN At least 30% of the identified core ingredient is from certified farms, and the company has a Rainforest Alliance approved SmartSource Plan for scaling up supplies from certified farms of the named ingredient(s) to 100% content over time. With Option B, the percentage of certified content for the named ingredient(s) must be disclosed on the package until it reaches more than 90% certified content (see Section 3 of http://www.rainforest-alliance.org/sites/default/files/site-documents/marketing/seal-guidelines-agriculture.pdf).</p>

VSS	Policy for labelling claims	Policy for single products	Policy for composite products ²	Explicit policies regarding content requirements for labelling
UTZ ⁵	✓	✓	✓	<p>Coffee: At least 90% UTZ certified coffee content required for content claim. Which logo can be used depends on % of coffee content in product. >60%: flag only logo; <60% (composed products): logo with product specification.</p> <p>Cocoa: A content claim can be made in case of Segregation or Identity Preserved. At least 90% UTZ certified cocoa content required for content claim. Exception for seasonal products only: in 2013 claim also possible with at least 60% UTZ certified segregated cocoa content. This percentage must be clearly indicated on the package. (Exception expires in 2014.) Which logo can be used depends on % of cocoa content in product. >60%: flag only logo; <60% (composed products): logo with product specification.</p> <p>Tea: At least 90% UTZ certified coffee content required for content claim. If this is not possible due to the limited availability of certified tea, it is currently allowed to use the logo when at least 30% of the blend is UTZ certified. (This percentage will be reviewed early 2014.) The percentage must be specified on-pack. Which logo can be used depends on % of tea content in product. >60%: flag only logo; <60% (composed products): logo with product specification.</p> <p>Rooibos: At least 90% UTZ certified rooibos content required for content claim. Which logo can be used depends on % of rooibos content in product. >60%: flag only logo; <60% (composed products): logo with product specification.</p>

5 Information provided to SSI directly from UTZ

APPENDIX IV | VOTING MEMBER CONSTITUTION OF VSSs⁶

Voluntary Sustainability Initiative	Number of voting members	Voting members constituency
4C Association	269	Membership in the 4C Association is open for producers, coffee associations, organizations, civil society groups, coffee trade and industry, public institutions, standard setting organizations, research institutes or for individuals or other chain members of the coffee supply chain.
BCI	250	Members within the Civil Society, Producers, Retailers and Brands, and Suppliers and Manufacturers categories have the opportunity to be elected on the Council. Each category of organization has three seats on the Council for a total of 12 seats. Once elected the Council has the option to appoint up to three additional people to the Council.
Bonsucro	96	Voting member constituency is made up of farmers, industry, intermediaries, end-users and civil society. All Bonsucro members have voting power.
CmiA	No voting members	The partners of Cotton made in Africa come from a range of different sectors – from government and private-sector funding organisations, from cotton companies and consulting organizations, and from partners in the Demand Alliance (ITC, 2013b).
ETP	12	From ETP member companies.
Fairtrade	27	Producer Networks, National Fairtrade Organizations, Fairtrade Marketing Organizations.
FSC	819	The General Assembly is composed of all 819 members (429 organizational members, 390 individual members) originating from 85 countries. Members are associated to chambers and subchambers. When voting, each subchamber has the same voting power. Individual members per subchamber have 10% of the entire voting weight of their subchamber. ⁷
GLOBALG.A.P.	Information not available	The Board constitutes an equal number of elected producer and retailer representatives and is chaired by an independent chairperson.
IFOAM	750-800	The General Assembly is composed of approximately 800 member organizations originating from almost 120 countries.
PEFC	54	While PEFC standards target by default all stakeholders, emphasis is given to forest-based stakeholders, specifically small-scale producers.
ProTerra⁸	5 voting members on the Board of Directors of the Foundation; 3 voting members on the Board of Governors of the ProTerra Certification Program	Membership is open to all stakeholders in the food and feed systems, and support industries that service these sectors. Membership categories include the following: Agricultural operations, including Agricultural producers, Agricultural cooperatives; Industry, including but not limited to Processors, Trading and brokering organizations, Distributors, Manufacturers, Food retailers, Food service; Industry support companies including but not limited to Financial institutions, Consultancies, Certification bodies, Surveillance organizations, ProTerra Certified organisations, Trade associations, Civil society organizations, Government agencies, Academic and research institutions, and Individuals (ProTerra, 2012).

⁶ Information provided by VSSs directly unless otherwise stipulated.

⁷ Information provided by FSC in reference to FSC n.d.-b, n.d.-c.

⁸ The ProTerra Certification Program has its own separate governance structure within the ProTerra Foundation, which is virtually identical to that of an association. An association has a board of directors and a membership. The members each have a vote in advising the board of directors. Similarly, the ProTerra Certification Program has a board of governors and a membership, and each member has one vote in advising the board of directors. There is a separate Board of Governors of the Certification Program (See ProTerra, 2013).

Voluntary Sustainability Initiative	Number of voting members	Voting members constituency
RSB	21	The Roundtable on Sustainable Biomaterials (RSB) is a membership-based initiative open to farmers, companies, NGOs, experts, governments and inter-governmental agencies (ITC, 2013b). Representatives come from the 11 stakeholder chambers. To ensure equal representation, most chambers are required to elect one of their representatives on the Steering Board from a country in the global North (developed) and one from a country in the global South (developing) (ITC, 2013b). Each RSB Chamber can elect up to 3 delegates to seat in the Assembly of Delegates. Delegates represent their chamber's position, not their personal position or their company's (SSI correspondence with RSB).
RSPO	869	7 membership categories. 1) Grower, 2) Consumer Goods Manufacturing, 3) Banks/investors, 4) Environmental NGOs, 5) Social NGOs, 6) Processors & Traders, 7) Retailers. The minimum to meet quorum during RSPO GA is 80 ordinary members. Currently RSPO has a total of 869 ordinary members. RSPO also has more than 300 supply chain associates and close to 200 associate members, but these two category of members are not eligible to vote at the GA.
RTRS	162	Producers, industry and CSOs. Each constituency has same voting power on Board.
SAN/RA⁹	9	The General Assembly is made up of all Network members and is the supreme authority of the Sustainable Agriculture Network. It is composed of one representative from each of the member organizations and presents motions to the Board of Directors. All decisions made by this body are considered official with votes of at least 50% of the Assembly's members. Meetings are held at least once every two years. ¹⁰
UTZ¹¹	5 - 13, currently 9	At least one member from each of the following groups: <ul style="list-style-type: none"> - production - supply chain (including brands, processors, trade, retailers) - civil society/non-governmental organizations (NGOs) - trade unions Membership is also open to independent individuals with required skills, expertise and experience.

⁹ SAN, 2010b.

¹⁰ As noted in SSI correspondence with Rainforest Alliance.

¹¹ UTZ, 2013.

APPENDIX V | SOCIAL CRITERIA COVERAGE OF VOLUNTARY SUSTAINABILITY STANDARDS BY COMMODITY

	Labour rights	Health and safety	Employment conditions	Community involvement	Human rights	Gender	Employment benefits	Humane treatment of animals	Total average
Biomass	100%	83%	80%	100%	100%	67%	0%	NA	76%
RSB	100%	83%	80%	100%	100%	67%	0%	NA	76%
Cocoa	94%	82%	86%	23%	65%	57%	43%	50%	66%
SAN/RA	100%	80%	80%	90%	80%	53%	90%	100%	84%
Fairtrade	91%	100%	100%	0%	67%	73%	80%	NA	73%
UTZ	100%	93%	84%	0%	93%	33%	0%	NA	58%
IFOAM	86%	53%	80%	0%	20%	67%	0%	100%	51%
Bananas	74%	83%	70%	23%	50%	53%	53%	75%	62%
SAN/RA	100%	80%	80%	90%	80%	53%	90%	100%	84%
Fairtrade	91%	100%	100%	0%	67%	73%	80%	NA	73%
IFOAM	86%	53%	80%	0%	20%	67%	20%	100%	53%
GLOBALG.A.P.	20%	100%	20%	0%	33%	20%	20%	100%	39%
Tea	81%	86%	68%	15%	52%	48%	42%	50%	59%
SAN/RA	100%	80%	80%	90%	80%	53%	90%	100%	84%
Fairtrade	91%	100%	100%	0%	67%	73%	80%	NA	73%
UTZ	100%	93%	84%	0%	93%	33%	0%	NA	58%
IFOAM	86%	53%	80%	0%	20%	67%	0%	100%	51%
ETP	89%	87%	44%	0%	20%	40%	60%	NA	48%
GLOBALG.A.P.	20%	100%	20%	0%	33%	20%	20%	100%	39%
Soy	76%	77%	74%	34%	43%	45%	46%	40%	59%
RTRS	100%	80%	92%	80%	67%	67%	50%	NA	76%
Fairtrade	91%	100%	100%	0%	67%	73%	80%	NA	73%
ProTerra	83%	50%	76%	90%	27%	0%	80%	NA	58%
IFOAM	86%	53%	80%	0%	20%	67%	0%	100%	51%
GLOBALG.A.P.	20%	100%	20%	0%	33%	20%	20%	100%	39%
Palm Oil	76%	80%	54%	45%	33%	46%	38%	75%	57%
SAN/RA	100%	80%	80%	90%	80%	90%	90%	100%	89%
IFOAM	86%	53%	80%	0%	20%	67%	0%	100%	51%
RSPO	97%	87%	36%	90%	0%	7%	40%	NA	51%
GLOBALG.A.P.	20%	100%	20%	0%	33%	20%	20%	100%	39%
Coffee	80%	77%	67%	15%	57%	46%	32%	50%	56%
SAN/RA	100%	80%	80%	90%	80%	53%	90%	100%	84%
Fairtrade	91%	100%	100%	0%	67%	73%	80%	NA	73%
UTZ	100%	93%	84%	0%	93%	33%	0%	NA	58%
IFOAM	86%	53%	80%	0%	20%	67%	0%	100%	51%
GLOBALG.A.P.	20%	100%	20%	0%	33%	20%	20%	100%	39%
4C Association	83%	37%	40%	0%	47%	27%	0%	NA	33%
Sugar	79%	75%	62%	28%	40%	43%	38%	60%	56%
SAN/RA	100%	80%	80%	90%	80%	53%	90%	100%	84%
Fairtrade	91%	100%	100%	0%	67%	73%	80%	NA	73%
IFOAM	86%	53%	80%	0%	20%	67%	0%	100%	51%
GLOBALG.A.P.	20%	100%	20%	0%	33%	20%	20%	100%	39%
Bonsucro	100%	40%	32%	50%	0%	0%	0%	NA	32%
Cotton	70%	66%	65%	10%	32%	32%	20%	40%	45%
Fairtrade	91%	100%	100%	0%	67%	73%	80%	NA	73%
IFOAM	86%	53%	80%	0%	20%	67%	0%	100%	51%
GLOBALG.A.P.	20%	100%	20%	0%	33%	20%	20%	100%	39%
CmiA	60%	30%	48%	50%	40%	0%	0%	NA	33%
BCI	94%	47%	76%	0%	0%	0%	0%	NA	31%
Forestry	100%	50%	0%	100%	0%	0%	0%	NA	36%
PEFC	100%	50%	0%	100%	0%	0%	0%	NA	36%
FSC	100%	50%	0%	100%	0%	0%	0%	NA	36%

APPENDIX VI | ENVIRONMENTAL CRITERIA COVERAGE OF VSSs BY COMMODITY

	Soil	Waste	Synthetic inputs	Water	GMO prohibition	Biodiversity	Energy	Greenhouse gas	Total average
Bananas	85%	78%	70%	80%	75%	82%	65%	40%	72%
IFOAM	100%	100%	100%	100%	100%	100%	100%	67%	96%
SAN/RA	80%	60%	60%	70%	100%	93%	80%	47%	74%
Fairtrade	60%	53%	53%	50%	100%	60%	60%	47%	60%
GLOBALG.A.P.	100%	100%	67%	100%	0%	73%	20%	0%	58%
Palm Oil	80%	87%	72%	75%	67%	75%	60%	45%	70%
IFOAM	100%	100%	100%	100%	100%	100%	100%	67%	96%
SAN/RA	80%	60%	60%	70%	100%	93%	80%	47%	74%
GLOBALG.A.P.	100%	100%	67%	100%	0%	73%	20%	0%	58%
RSPO	40%	87%	60%	30%	NA	33%	40%	67%	51%
Biomass	100%	100%	40%	85%	0%	67%	50%	100%	68%
RSB	100%	100%	40%	85%	0%	67%	50%	100%	68%
Soy	90%	88%	69%	75%	60%	65%	44%	48%	67%
IFOAM	100%	100%	100%	100%	100%	100%	100%	67%	96%
ProTerra	90%	87%	67%	80%	100%	27%	40%	67%	70%
Fairtrade	60%	53%	53%	50%	100%	60%	60%	47%	60%
GLOBALG.A.P.	100%	100%	67%	100%	0%	73%	20%	0%	58%
RTRS	100%	100%	60%	45%	0%	67%	0%		54%
Tea	87%	74%	68%	86%	50%	62%	70%	28%	66%
IFOAM	100%	100%	100%	100%	100%	100%	100%	67%	96%
SAN/RA	80%	60%	60%	70%	100%	93%	80%	47%	74%
ETP	100%	100%	67%	100%	0%	33%	100%	7%	63%
Fairtrade	60%	53%	53%	50%	100%	60%	60%	47%	60%
GLOBALG.A.P.	100%	100%	67%	100%	0%	73%	20%	0%	58%
UTZ	80%	33%	60%	95%	0%	13%	60%	0%	43%
Cocoa	84%	69%	68%	83%	60%	68%	64%	32%	66%
IFOAM	100%	100%	100%	100%	100%	100%	100%	67%	96%
SAN/RA	80%	60%	60%	70%	100%	93%	80%	47%	74%
Fairtrade	60%	53%	53%	50%	100%	60%	60%	47%	60%
GLOBALG.A.P.	100%	100%	67%	100%	0%	73%	20%	0%	58%
UTZ	80%	33%	60%	95%	0%	13%	60%	0%	43%
Sugar	86%	73%	56%	68%	60%	72%	60%	44%	65%
IFOAM	100%	100%	100%	100%	100%	100%	100%	67%	96%
SAN/RA	80%	60%	60%	70%	100%	93%	80%	47%	74%
Fairtrade	60%	53%	53%	50%	100%	60%	60%	47%	60%
GLOBALG.A.P.	100%	100%	67%	100%	0%	73%	20%	0%	58%
Bonsucro	90%	53%	0%	20%	0%	33%	40%	60%	37%
Forestry	100%	83%	67%	50%	100%	100%	0%	0%	62%
PEFC	100%	67%	67%	75%	100%	100%	0%	0%	64%
FSC	100%	100%	67%	25%	100%	100%	0%	0%	61%
Coffee	73%	62%	64%	74%	67%	59%	60%	27%	61%
IFOAM	100%	100%	100%	100%	100%	100%	100%	67%	96%
SAN/RA	80%	60%	60%	70%	100%	93%	80%	47%	74%
Fairtrade	60%	53%	53%	50%	100%	60%	60%	47%	60%
GLOBALG.A.P.	100%	100%	67%	100%	0%	73%	20%	0%	58%
UTZ	80%	33%	60%	95%	0%	13%	60%	0%	43%
4C Association	20%	27%	47%	30%	100%	13%	40%	0%	35%
Cotton	70%	59%	77%	58%	60%	51%	36%	23%	54%
IFOAM	100%	100%	100%	100%	100%	100%	100%	67%	96%
Fairtrade	60%	53%	53%	50%	100%	60%	60%	47%	60%
GLOBALG.A.P.	100%	100%	67%	100%	0%	73%	20%	0%	58%
CmiA	30%	20%	67%	15%	100%	0%	0%	0%	29%
BCI	60%	20%	100%	25%	0%	20%	0%	0%	28%

APPENDIX VII | ECONOMIC CRITERIA COVERAGE OF VSSs BY COMMODITY

	Minimum wage	Living wage	Written contracts between buyers and sellers	Product quality requirements	Price premiums	Total average
Cocoa	100%	35%	25%	25%	50%	47%
Fairtrade	100%	40%	100%	0%	100%	68%
IFOAM	100%	100%	0%	100%	0%	60%
UTZ	100%	0%	0%	0%	100%	40%
SAN/RA	100%	0%	0%	0%	0%	20%
Bananas	80%	40%	25%	25%	25%	39%
Fairtrade	100%	40%	100%	0%	100%	68%
IFOAM	100%	100%	0%	100%	0%	60%
SAN/RA	100%	0%	0%	0%	0%	20%
GLOBALG.A.P.	20%	20%	0%	0%	0%	8%
Soy	84%	52%	20%	20%	20%	39%
Fairtrade	100%	40%	100%	0%	100%	68%
IFOAM	100%	100%	0%	100%	0%	60%
RTRS	100%	100%	0%	0%	0%	40%
ProTerra	100%	0%	0%	0%	0%	20%
GLOBALG.A.P.	20%	20%	0%	0%	0%	8%
Tea	87%	43%	17%	17%	33%	39%
Fairtrade	100%	40%	100%	0%	100%	68%
IFOAM	100%	100%	0%	100%	0%	60%
ETP	100%	100%	0%	0%	0%	40%
UTZ	100%	0%	0%	0%	100%	40%
SAN/RA	100%	0%	0%	0%	0%	20%
GLOBALG.A.P.	20%	20%	0%	0%	0%	8%
Sugar	84%	32%	20%	36%	20%	38%
Fairtrade	100%	40%	100%	0%	100%	68%
IFOAM	100%	100%	0%	100%	0%	60%
Bonsucro	100%	0%	0%	80%	0%	36%
SAN/RA	100%	0%	0%	0%	0%	20%
GLOBALG.A.P.	20%	20%	0%	0%	0%	8%
Palm Oil	80%	55%	20%	25%	0%	36%
IFOAM	100%	100%	0%	100%	0%	60%
RSPO	100%	100%	80%	0%	0%	56%
SAN/RA	100%	0%	0%	0%	0%	20%
GLOBALG.A.P.	20%	20%	0%	0%	0%	8%
Coffee	77%	27%	17%	17%	33%	34%
Fairtrade	100%	40%	100%	0%	100%	68%
IFOAM	100%	100%	0%	100%	0%	60%
UTZ	100%	0%	0%	0%	100%	40%
SAN/RA	100%	0%	0%	0%	0%	20%
4C Association	40%	0%	0%	0%	0%	8%
GLOBALG.A.P.	20%	20%	0%	0%	0%	8%
Cotton	68%	32%	20%	32%	20%	34%
Fairtrade	100%	40%	100%	0%	100%	68%
IFOAM	100%	100%	0%	100%	0%	60%
CmiA	60%	0%	0%	60%	0%	24%
BCI	60%	0%	0%	0%	0%	12%
GLOBALG.A.P.	20%	20%	0%	0%	0%	8%
Biomass	100%	0%	0%	0%	0%	20%
RSB	100%	0%	0%	0%	0%	20%
Forestry	0%	0%	0%	0%	0%	0%
FSC	0%	0%	0%	0%	0%	0%
PEFC	0%	0%	0%	0%	0%	0%

The following provides an overview of the data sources, methods and purpose of calculations and graphics presented in each commodity section, organized by section sub-titles.

Introduction

Conventional versus standard-compliant production (map)

The market sections are introduced using a map showing the general distribution of conventional and standard-compliant production volumes within the commodity sectors. All the maps depict the latest data available for each voluntary sustainability standard in the commodities examined (i.e., the coffee map uses data from 2012 (4C Association and country totals, Rainforest Alliance and UTZ Certified) and 2011 (Fairtrade and Organic)). The sizes of the circles on the map are determined by each country's total production volumes and the grey areas in the circles correspond to conventional figures. Across commodities, the conventional and sustainable market data used to compile the maps differed and are referenced in detail for each map.

Leading country producers of standard-compliant production by initiative (bar chart)

The bar chart depicts the top five producing countries for standard-compliant commodities by metric tons disaggregated by standard. Readers can quickly identify the countries supplying the most standard-compliant commodities and what standards account for this production.

Standard-compliant and conventional key statistics for production and trade (table)

This table shows high-level statistics for both conventional and standard-compliant production and sales. It aims to provide the reader with a quick snapshot of the state of play of voluntary sustainability standards within the sector.

1. Market Review

Commodity sector highlights

All aggregated production and sales data presented in this section of the commodity sector is adjusted for multiple-certification using the methodology described above.

Growth in standard-compliant production and sales (bar chart)

The chart shows the aggregation of the sustainable production volumes and sales over time for the commodity sector adjusted for multiple certification. The adjustment was calculated based on the most recent data set available and then applied consistently across all years for both production and sales.

This approach was applied to all sectors, with the exception of the palm oil and the soybean sectors, where double counting for multiple certification is negligible. Within the palm oil sector, the

Roundtable on Sustainable Palm Oil represents the lion's share of standard-compliant production as compared to International Federation of Organic Agriculture Movements ("Organic") and Rainforest Alliance, the only other notable voluntary sustainability standards operating in the sector. Within the soybean sector, ProTerra represents the vast majority of compliant production while Round Table on Sustainable Soy and Organic make up the rest of the market share. In the cane sugar section, production and sales estimates were adjusted by existing data on multiple certification for Fairtrade/Organic cane sugar recorded and reported by Fairtrade in its "monitoring" reports (FLO, 2011, 2012).

Compound annual growth for production and sales (line charts)

The CAGR for production volumes and sales in metric tons for each voluntary sustainability standard operating in the commodity sector is shown from 2008 to the most recent year of available data. The time series line charts provide the reader with a quick overview of how the standard is growing in terms of both production and sales from year to year relative to one another within the commodity sector examined.

The first line chart shows the relative growth in production by initiative over the last five years (or nearest corresponding data set). The second line chart shows the relative growth in sales by initiative over the last five years (or nearest corresponding data set). Sales are defined as the volume of product that was purchased "as" standard compliant and not otherwise sold on conventional markets.

2. Market Development

This section contains an overview of the history of the development of standards within the specific commodity sector.

3. Market Performance

Market data are provided for the individual voluntary sustainability standards operating within the commodity sectors.

Importance of standard-compliant production and sales relative to the global market production and sales

The table shows total production and sales in metric tons by standard for the most recent market data available relative to the global voluntary sustainability standard production adjusted for multiple certification.

Individual voluntary sustainability standard sales by country

The breakdown of standard-compliant sales by country is provided in a donut chart.

Individual voluntary sustainability standard sales and area harvested by country

The breakdown of standard-compliant sales and area harvested by country is provided in a table.

Individual voluntary sustainability standard production and sales time series

The discrepancy between standard-compliant production and sales in metric tons is shown as a time series line chart for 2008 to 2012 where the data is available. The data used to compile the line chart are shown in a subsequent table. The total production and sales in metric tons is shown broken down for the years shown in the line graph.

4. Supply

Understanding where commodities are being produced can assist with strategically sourcing a particular commodity as well as determining where new opportunities for market entry exist.

Total (standard-compliant and conventional) production breakdown by country

A donut chart depicting distribution of total global production of the commodity in question provides a reference for understanding the relative distribution of standard-compliant production.

Total (standard-compliant and conventional) export breakdown by country

A donut chart depicting distribution of total exports of the commodity by country provides a reference for understanding the relative distribution of exported standard-compliant production.

Standard-compliant production by country

A donut chart depicts distribution of total standard-compliant production for understanding the relative distribution of standard-compliant production.

Standard-compliant production as a percentage of national production for the largest producing countries

A stack bar chart depicts the top producing countries for standard-compliant commodities by metric tons disaggregated by standard. The stack bar chart provides the relative importance of individual initiatives in major standard-compliant producing countries.

Standard-compliant production by continent

A stack bar chart depicts the relative distribution of standard-compliant production by initiative within each continent. The chart depicts the relative importance of individual initiatives in different continents. Continents with minimal production volumes have been excluded.

Top 20 largest sellers of the standard-compliant production as a percentage of total exports

The percentage of the standards supplying compliant product relative to total national production is shown for each of the producing countries.

5. Pricing and Premiums

The data presented for prices and premiums were collected primarily in published documents and anecdotal information. High quality prices and premium information are difficult to collect as they are not currently captured by the vast majority of the voluntary sustainability standards, with the exception of UTZ and Fairtrade. Premiums generally correspond to those at the farm gate (e.g., cooperatives), unless otherwise indicated.

6. Challenges and Opportunities

This section summarizes the market trend, as well as expected market growth moving forward. The section also provides a high-level summary of some of the main challenges and opportunities facing market growth moving forward, as well as for ensuring sustainability within the sector more generally.

“THE STATE OF SUSTAINABILITY INITIATIVES OFFERS AN INVALUABLE PERSPECTIVE ON THE DEVELOPING WORLD OF SUSTAINABILITY STANDARDS.

The sector needs it, since we must be well informed in order to help design sustainable supply chains. The review’s coverage of market performance across initiatives offers an important starting point for more strategic market development. The effort to compare standards and put them in perspective may lead to a useful debate about quality, standard collaboration and targeted delivery of impacts through such initiatives.”

—Han de Groot, Executive Director, UTZ Certified

“The *State of Sustainability Review 2014* offers the most comprehensive and detailed analysis on systems and market trends of prominent sustainability standards available in the public sphere today. The report explores, at length, the extent to which these standards are contributing to the development of more transparent, efficient and sustainable supply chains, whilst also highlighting some key challenges for the future.

THIS EXCELLENT REVIEW IS ESSENTIAL READING FOR ANYONE SEEKING TO MANAGE COMMITMENTS TO SUSTAINABLE SOURCING.”

—Paulo Barone,
Green Coffee Sustainability Operations Manager,
Nestlé Nespresso S.A.

“The SSI Review’s analysis and market data offer an essential resource for developing economies seeking to play a stronger role in global green markets.

AS THE MOST COMPREHENSIVE BODY OF WORK OF ITS KIND, THE REVIEW PLAYS AN IMPORTANT ROLE IN MOVING THE INTERNATIONAL DIALOGUE ON VOLUNTARY SUSTAINABILITY STANDARDS FORWARD.”

—Ulrich Hoffmann, UNFSS Coordinator