

Reaching far and wide

Collective presence and growth trends of ISEAL member schemes across seven commodities

January 2019



ISEAL member schemes are rising in global presence and relevance in many agricultural sectors.

Sustainability standards have been operational in agriculture for over two decades. Starting with coffee, cocoa and tea sectors in the late 1980s, today ISEAL member standards are functional in over seventy commodity sectors. This briefing paper shares reach and growth trends from 2011–16 for seven leading ISEAL member agriculture schemes across seven commodity sectors: bananas, cocoa, coffee, cotton, palm oil, sugarcane and tea.

About this paper

The highest aim of the ISEAL Alliance is to improve impacts for people and the environment. ISEAL supports standards to measure their performance and put learning and improvement at the centre of their work. Sustainability schemes, such as those in the ISEAL community, address significant challenges in the world today and are one of the few proven vehicles for making production and trade more sustainable. However, there remains a critical need to understand more about the outcomes and long-term impact of certification on the ground and for standards to improve in the areas where they could be performing better.

A first step towards understanding schemes' impacts is to have a better grasp on their reach and presence. Sustainability standards have had a strong and early presence in the agricultural sector and thirty years on, understanding their footprint in leading sectors is key. What are the trends for standards in key agricultural sectors? How do growth trends vary across commodities? Are standards moving from niche to mainstream or is growth plateauing? Which countries are reached and how deep is the presence?

The paper provides insights on growth trends and geographic presence of seven ISEAL member schemes that are leading global agricultural standards across seven commodities. We focus on trends and presence in producing and exporting countries where these schemes are adopted, with a specific interest in presence in low and lower-income classified countries.

About the data and analysis

The majority of the analysis utilises data collected by the Research Institute of Organic Agriculture (FiBL). ISEAL has worked with member schemes over the years to achieve streamlined reporting and aligned indicators.

The paper aims to build upon the analysis done by FiBL and IISD in the State of Sustainable Markets 2018 report. The majority of the analysis looks at the combined reach across seven commodities. It is recognized that this aggregated view is limited. Where applicable, background context has been added to reduce room for misinterpretation. Further contextual analysis was done, namely comparing ISEAL member data to figures from the Food and Agriculture Organization Corporate Statistical Database (FAOSTAT) and World Bank.

Multiple certification is a prominent discussion point in certification. Producers, groups or sites are multiple certified when they are certified under more than one scheme. Unless otherwise noted, the data in this report takes into consideration average estimated multiple certification overlap of the focus ISEAL agricultural member schemes. The approach used to calculate is the average approach developed by FiBL for the State of Sustainable Markets 2018 report which takes into consideration the minimum potential amount of multiple certification (0% multiple certified area) and maximum estimate (100% multiple certified area) range, whereby the estimated average is calculated by taking the average of the minimum and maximum multiple certification estimates.



The focus of this paper is seven agricultural commodities – bananas, cocoa, coffee, cotton, palm oil, sugarcane and tea – and the leading ISEAL member schemes operating in these sectors.



Commodities in focus

The seven agricultural commodities in focus constitute approximately 8% of the total global crop production area and the bulk of the area under certification globally.

From 2011 to 2016, the seven commodities increased their share of certified area in comparison to other commodities certified by these schemes, from 83% in 2011 to 98% in 2016. Meaning that the large growth of these main commodities overshadowed growth of the less prominent commodities. Despite the dominance of these seven commodities, it is important to recognize the spread of ISEAL member standards into other commodities notably - grapes (wine), quinoa, fruit, rice, medicinal and aromatic plants, herbs and spices, especially pepper.

ISEAL member schemes in focus

The analysis in this briefing paper focusses on ISEAL member agricultural schemes active in these seven commodity sectors – which are the Better Cotton Initiative (BCI), Bonsucro, Fairtrade, Global Coffee Platform (GCP), Roundtable of Sustainable Palm Oil (RSPO), Rainforest Alliance and UTZ.

It is important to note a few important differences between these schemes for the purposes of this paper. First, the unit of certification (or licensing) differs from the individual farm to farmer to plantation and also group certification models. Second, schemes vary in terms of the focus and sustainability outcomes of interest. However, a focus on improving production practices in these commodities is a commonality. Note that as this paper reports data from 2011-2016, it treats Rainforest Alliance and UTZ as separate schemes for analytical purposes.



The seven focus commodities in this paper account for 98% of all agricultural certified area harvested by the ISEAL member schemes.

Amongst the seven commodities, coffee and cocoa have a combined 47% share of total global certified harvested area. Followed by palm oil at 20% and cotton with 17% share. These four commodities comprise a significant amount of all sustainable certification in agriculture, globally.

Scope: Seven commodities and seven ISEAL member schemes

 Bananas	Fairtrade, Rainforest Alliance
 Cocoa	Fairtrade, Rainforest Alliance, UTZ
 Coffee	Fairtrade, Global Coffee Platform, Rainforest Alliance, UTZ
 Cotton	Better Cotton Initiative, Fairtrade
 Palm oil	Rainforest Alliance, RSPO
 Sugarcane	Bonsucro, Fairtrade, Rainforest Alliance
 Tea	Fairtrade, Rainforest Alliance, UTZ

ISEAL member schemes' collective certified area harvested by product | 2016

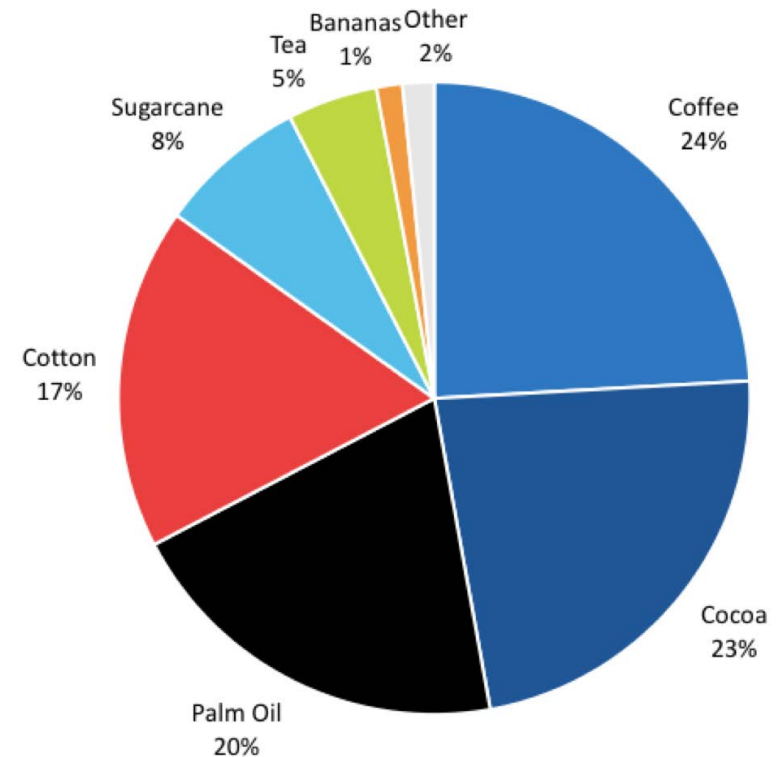
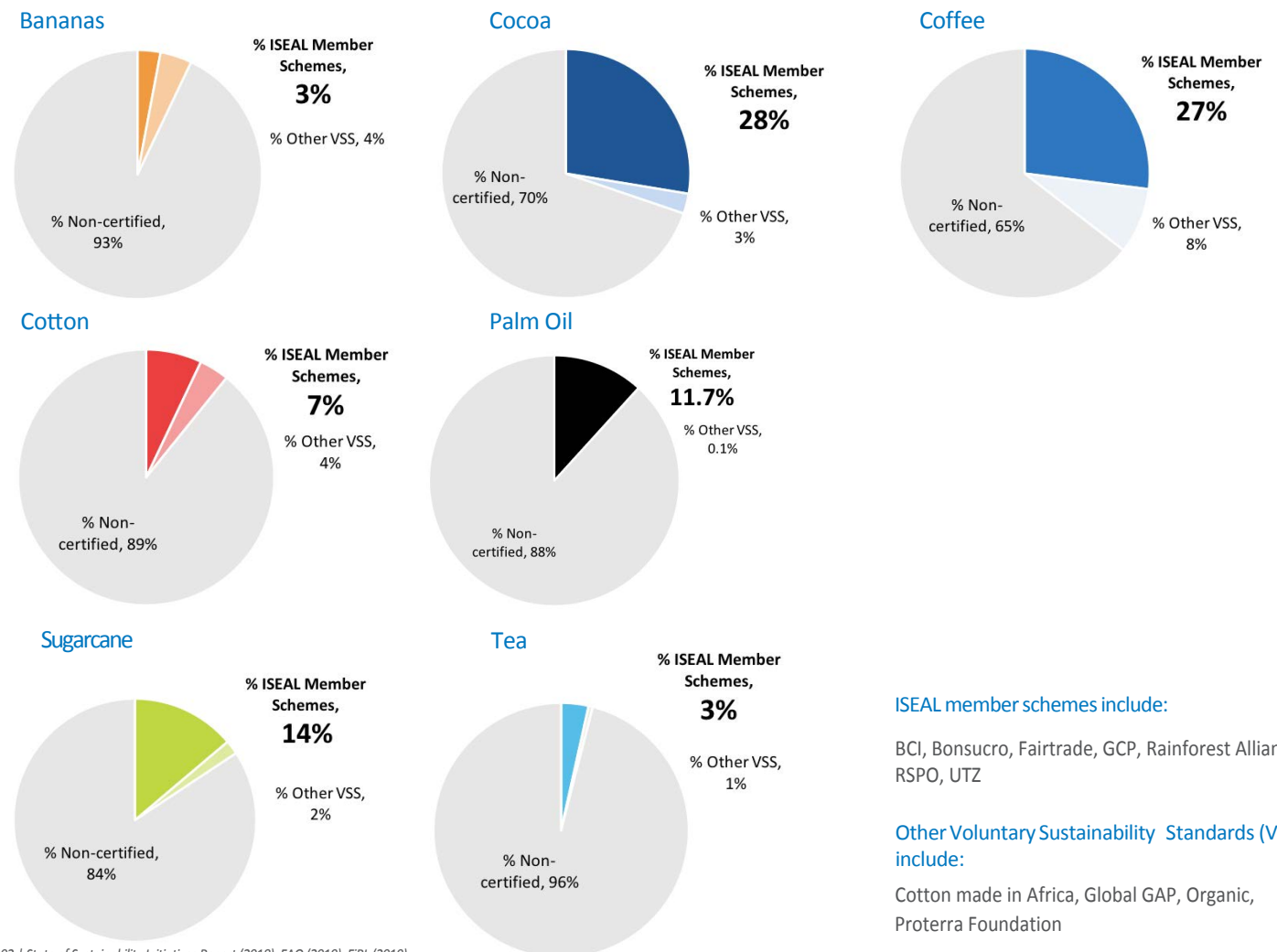


Fig 01 | FIBL (2018). All agri commodities certified by the schemes are included. Adjusted for average estimated multiple certification.

ISEAL member schemes have a strong and growing presence in the seven commodities globally with their certification footprint strongest in the cocoa, coffee, tea and palm oil sectors.

Globally, coffee has largest certification footprint with 35% of global production area certified, of which 27% is certified by ISEAL member schemes. However, cocoa leads the footprint of ISEAL member schemes with 28% of global cocoa production area certified by one of the three focus ISEAL member schemes.

ISEAL member schemes' share of global certified area harvested | 2016



ISEAL member schemes include:

BCI, Bonsucro, Fairtrade, GCP, Rainforest Alliance, RSPO, UTZ

Other Voluntary Sustainability Standards (VSS) include:

Cotton made in Africa, Global GAP, Organic, Proterra Foundation

Fig 02 | State of Sustainability Initiatives Report (2018), FAO (2019), FIBL (2019)

Area under certification is expanding in these commodities for the seven schemes collectively with harvested area tripling from 2011 – 2016.

The seven ISEAL member schemes collectively had 12 million hectares certified in 2016, up from 4 million hectares in 2011. Data indicates that harvested area under certification is expanding in all seven commodities for the schemes in focus from 2011 to 2016. Growth was particularly significant in 2013 for cocoa, coffee and palm oil. Cotton certification grew significantly in 2015.

ISEAL member scheme growth trends across the seven commodities from 2011–16

Bananas | 6-year growth 124%

Bananas continue to be a niche product as far as sustainability standards presence goes. The last six years have seen a 124% increase in area under certification but its relevance amongst the seven crops continues to be low, at 1% share of total area certified.

Cocoa | 6-year growth 301%

Cocoa has shown strong growth with area under certification increasing by 301% from 2011-16, registering a higher growth rate than coffee.

Coffee | 6-year growth 203%

Coffee continues to show growth in area under certification, mostly through 2012 and 2013 but has since stabilised with rate of growth slowing more recently.

Cotton | 6-year growth 356%

Cotton had the third largest net increase of certified area amongst all crops, behind cocoa and coffee, with an increase of 1.7 million hectares under certification from 2011-16.

Palm oil | 6-year growth 118%

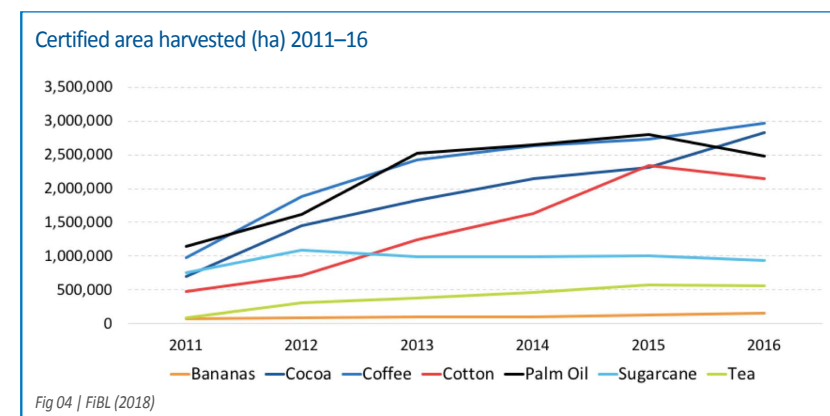
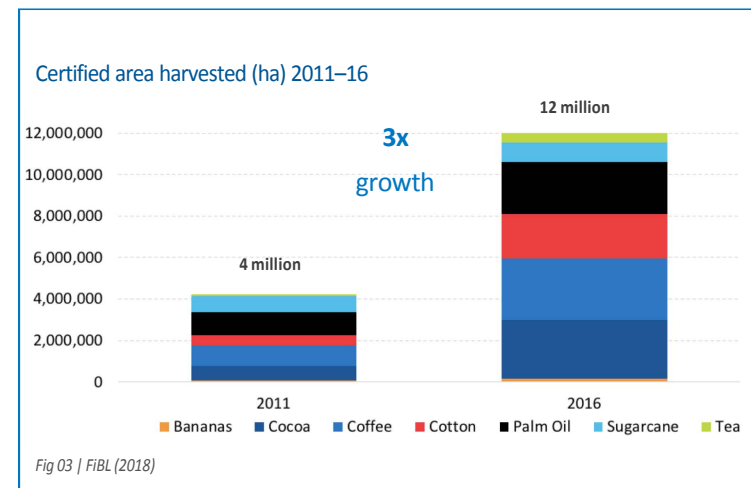
Palm oil is the sector with the 3rd largest area under certification amongst the ISEAL member schemes. Growth was most significant from 2012 to 2013, with certified area growth stabilizing in the last three years.

Sugarcane | 6-year growth 24%

Sugarcane certified area cultivation has grown only by 24% in the last six years, relatively low in comparison to the growth registered in other focus commodities.

Tea | 6-year growth 579%

Tea certification has shown impressive growth, although its share of certified area amongst the seven focus crops remains small. Certified area has grown consistently from 2011–16, although growth slowed from 2015 to 2016.

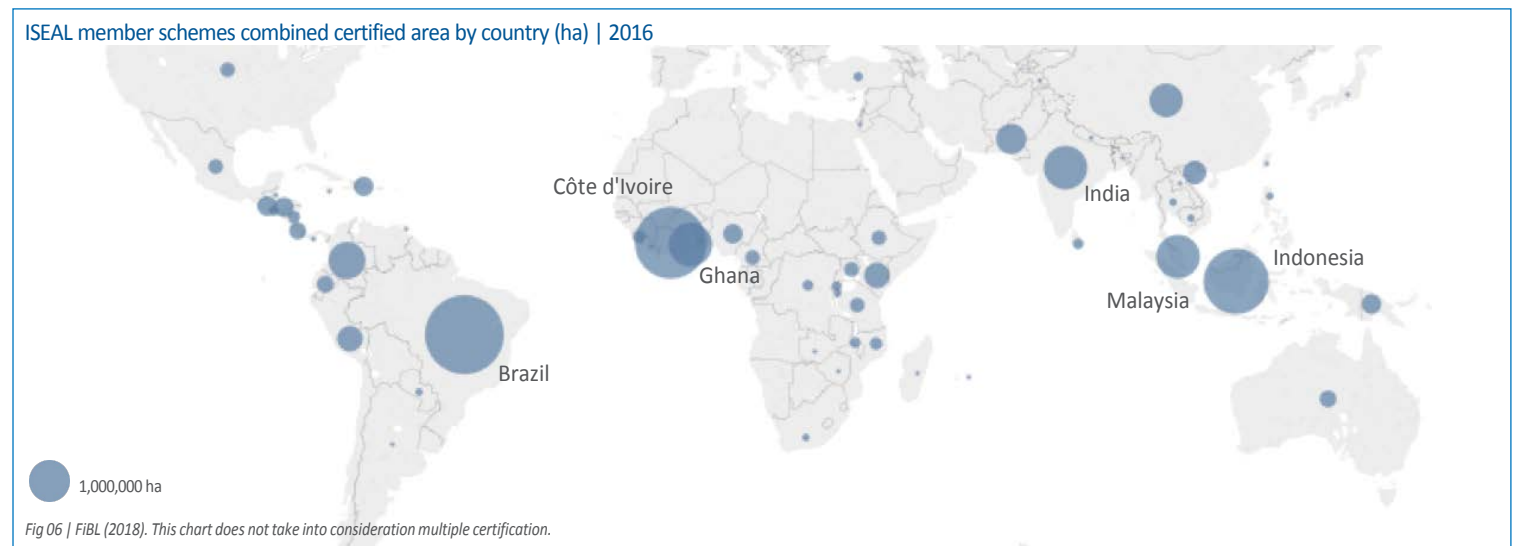
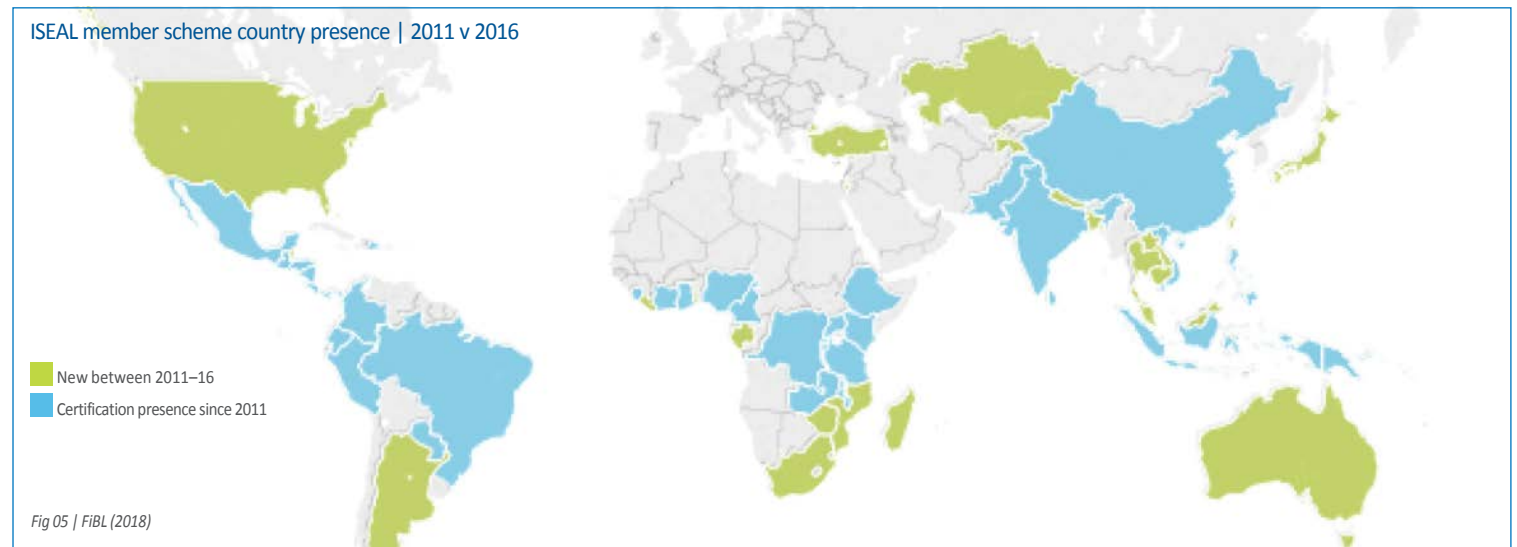


The seven ISEAL member schemes have a collective production presence in 62 countries across the seven commodities.

The map (top right) shows the global presence of the seven ISEAL member schemes collectively across the seven commodities. Schemes are expanding into new countries. The prominent new certification countries being Australia (sugarcane), China and Mozambique (cotton), Indonesia (tea) and Guatemala and Costa Rica (palm oil) and Côte d'Ivoire (coffee).

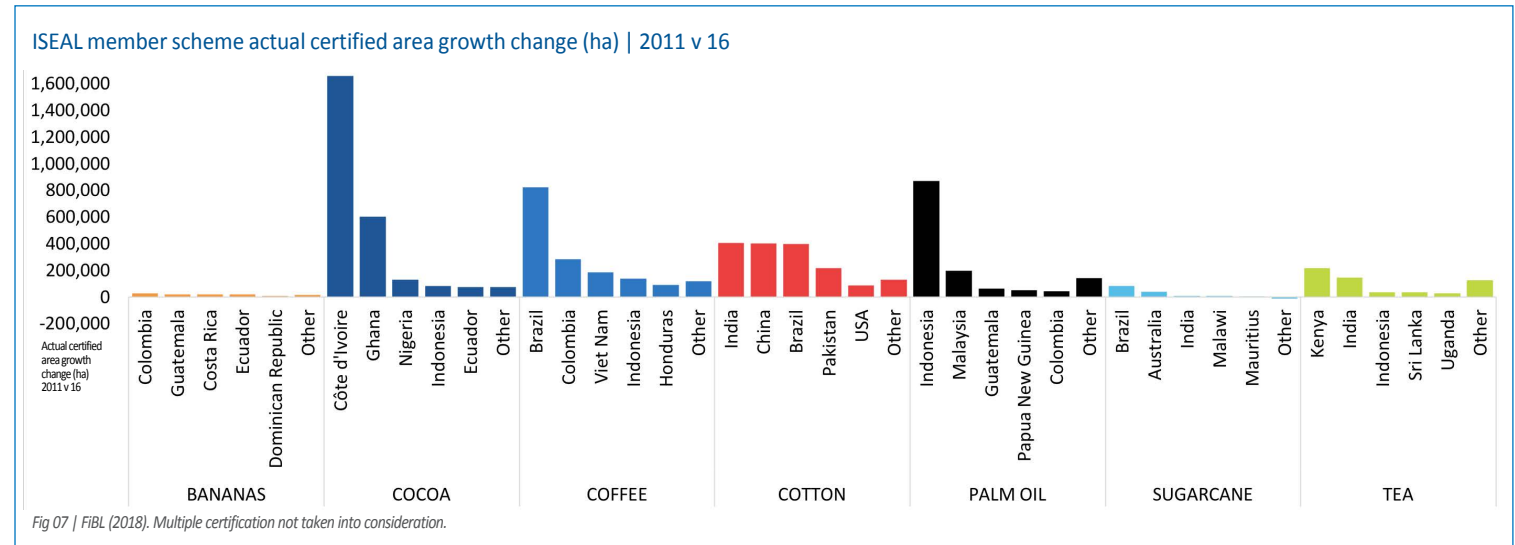
Although global presence is expansive, six countries account for 66% of total certified area for the seven commodities and schemes: Brazil, Côte d'Ivoire, Indonesia, Ghana, India and Malaysia.

The map (bottom right) shows the combined total certified area harvested for the seven commodities and ISEAL member schemes, highlighting the differences in total area certified by country in 2016.

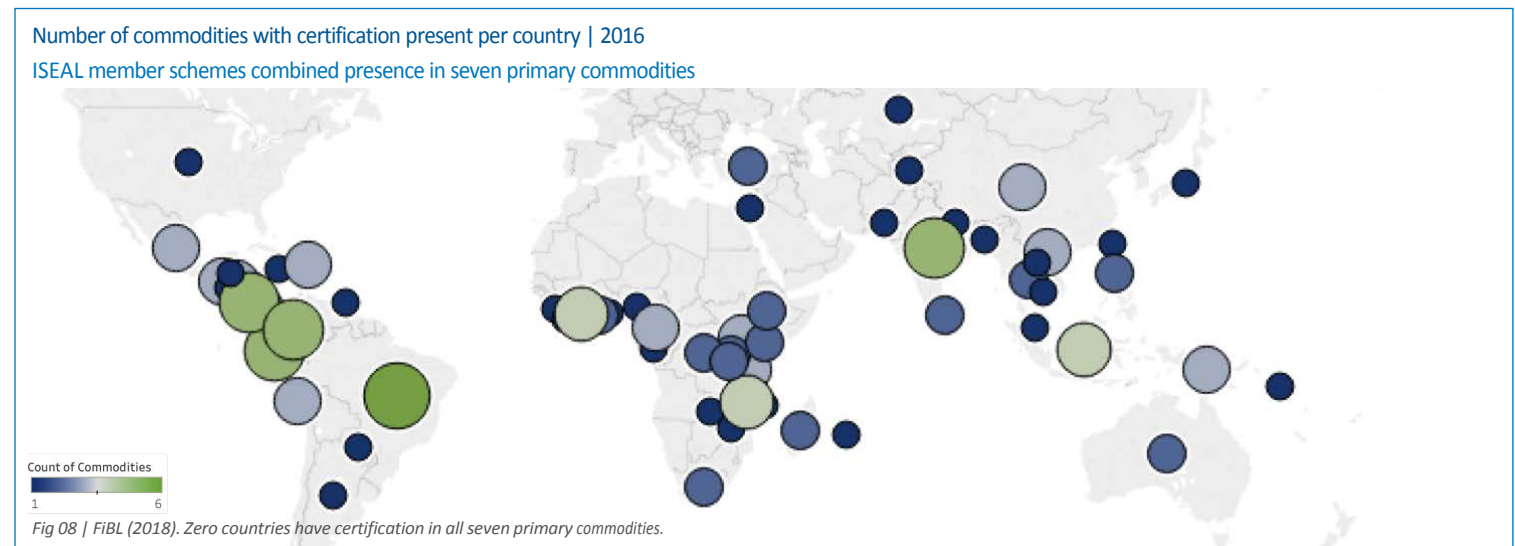


Between 2011 and 2016, area under certification expanded in all seven commodities both in primary producing and exporting countries.

Top countries driving growth in combined harvested area certified under the schemes between 2011 and 2016 were Côte d'Ivoire and Ghana in cocoa, Indonesia and Malaysia in palm oil, Brazil in coffee, and India in cotton.



An interesting trend is the consolidation of agricultural certification across products in a few key countries such as Brazil, India, Colombia and Costa Rica. The percentage of countries with multiple commodities certified is rising indicating a deepening presence by these schemes.

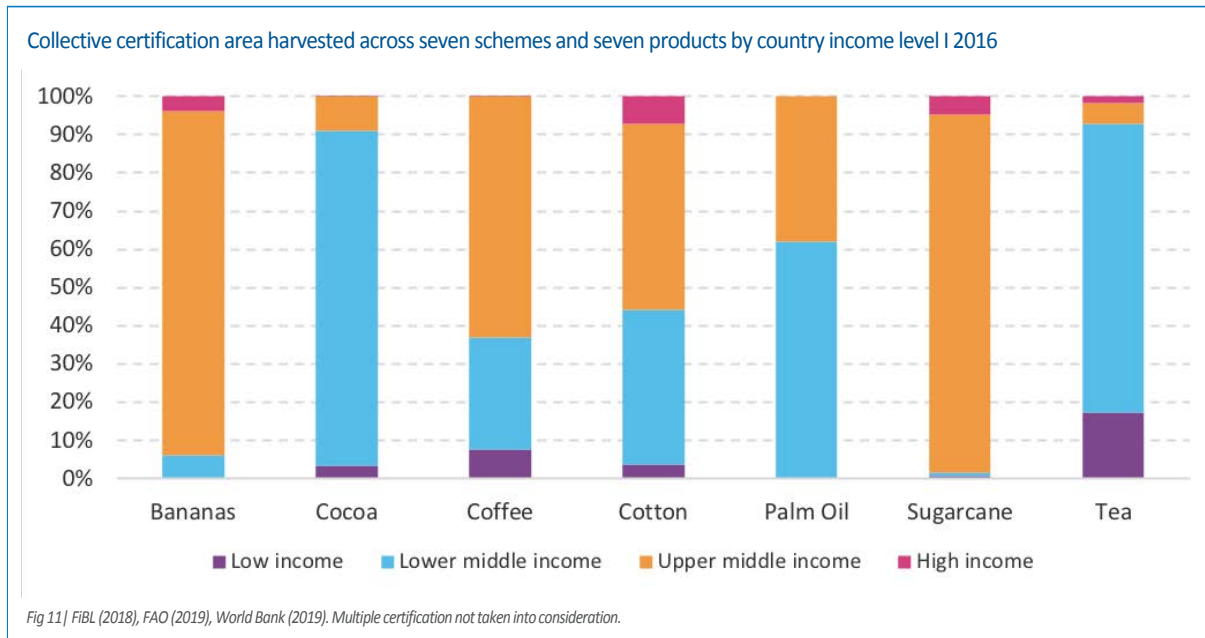
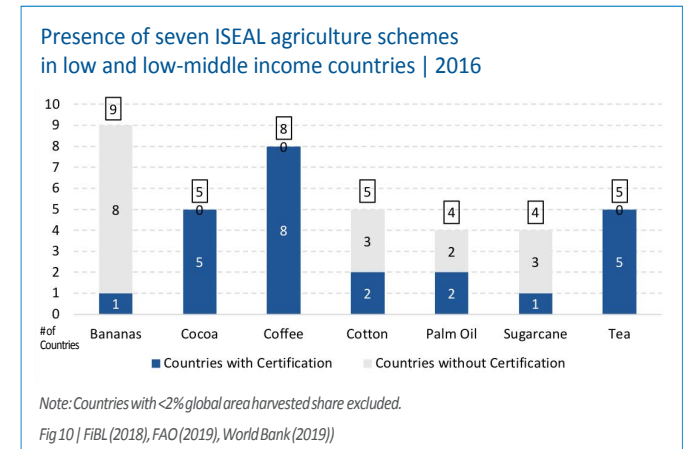
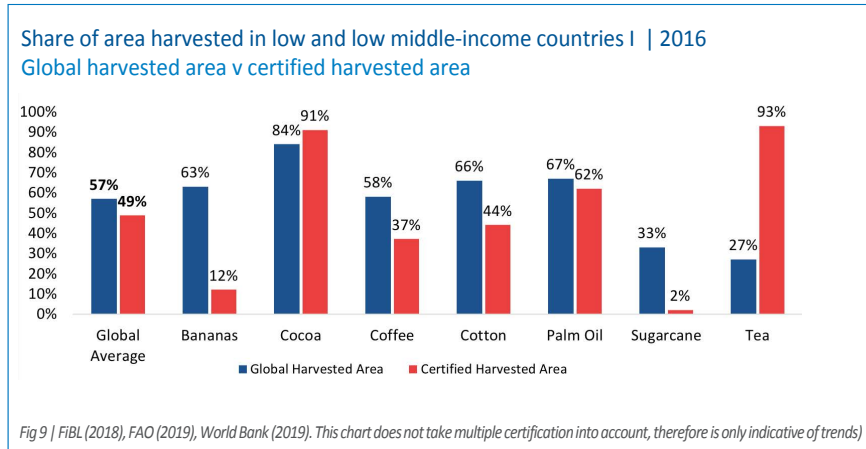


Nearly half of the global certified production of the seven commodities takes place in low and lower-middle income countries.

Low and low-middle income countries contribute to 49% of global certified production of the 7 commodities, while 57% of the global harvested area is in low and low-middle income countries. Cocoa and tea have a higher share of area harvested in low and low-middle income countries than the global average (chart top left).

ISEAL member schemes in cocoa, coffee and tea are reaching all main producing countries classified as low or lower-middle income (chart top right). Cotton certification is present in the largest two, (India and Pakistan) however is not present in Uzbekistan. Sugarcane is reaching the most prominent lower-middle income country, India, however is not present in Pakistan, the other leading lower-income producing country. While banana certification is only in one of the nine main producing countries classified as low to lower middle income (Philippines), certification is present in an additional five low and low middle-income countries (Honduras, Côte d'Ivoire, Nicaragua, Cameroon and Malawi).

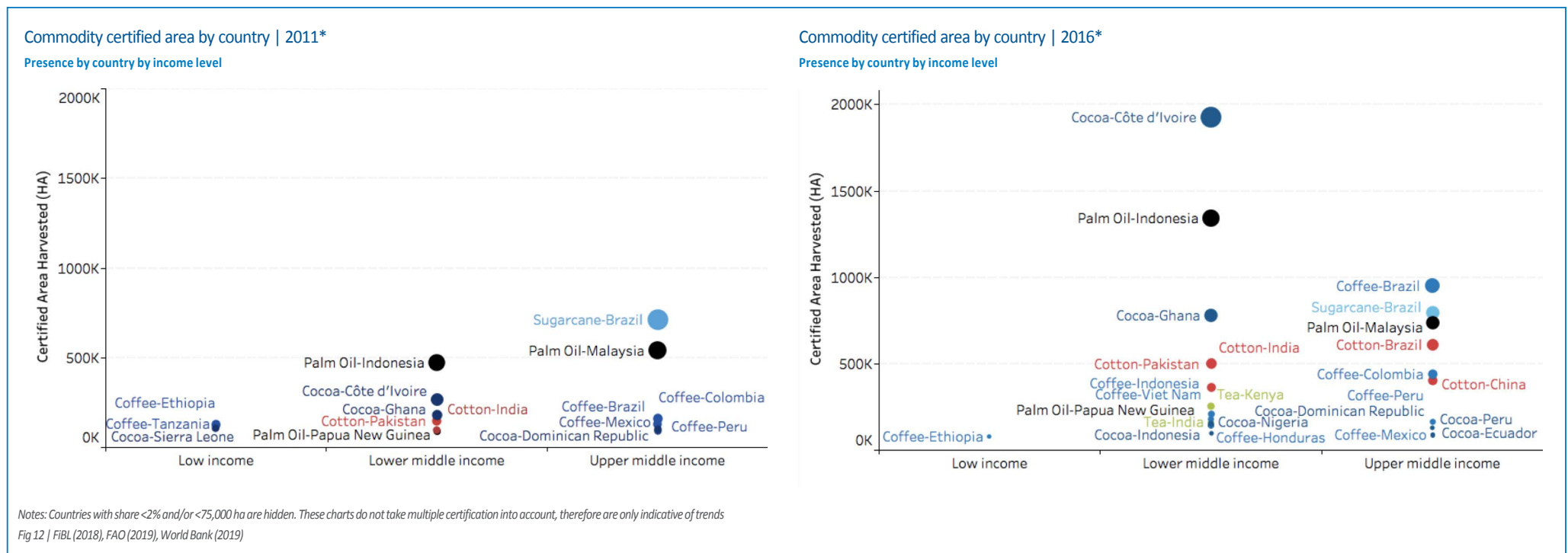
ISEAL member schemes in cocoa, palm oil and tea have more than half of harvested area certified in low or lower middle-income countries (chart bottom left). ISEAL member schemes do reach lower income countries, with tea and cocoa having an even slightly higher emphasis on the low income countries than the global commodity presence.



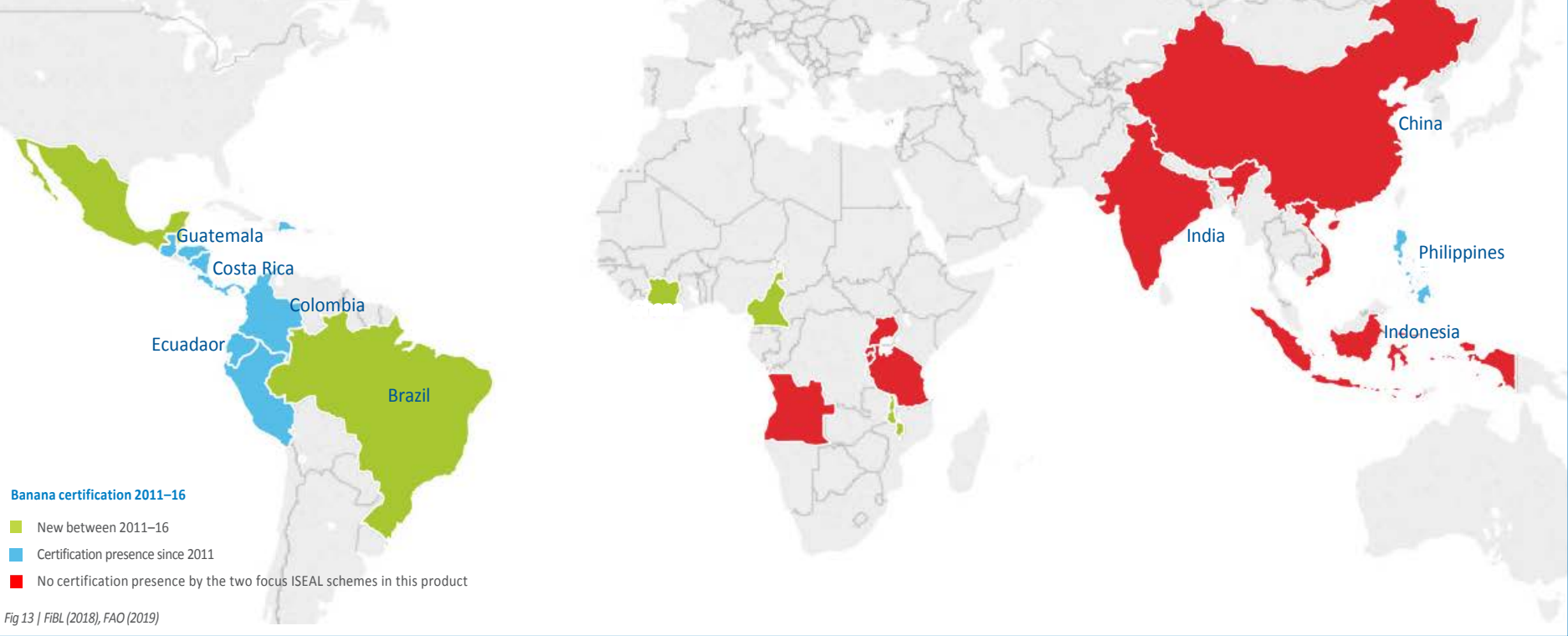
Reach in low and low-middle income countries has expanded over the last six years.

Over the last five years, in bananas and tea, ISEAL member schemes have slightly increased their share of presence in low and low middle-income countries. Cocoa increased share of prominence in lower middle-income countries over the time period.

Main lower middle-income presence is in cocoa in Côte d'Ivoire and palm oil in Indonesia. Solely looking at low income classified countries, ISEAL member schemes had the largest presence in coffee in Ethiopia, Uganda and Tanzania, cocoa in Sierra Leone, cotton in Mozambique and tea in Malawi.



Bananas - countries with certification presence by the focus ISEAL schemes | 2011–16



Banana certification, through the Fairtrade and Rainforest Alliance schemes, was present in 16 countries in 2016 expanding into 6 new countries since 2011 and accounting for 3% of global harvested banana area. ISEAL member certification footprint is highest in Colombia, Costa Rica and Guatemala.

Bananas | Certified v non-certified area – 2016

Share and harvested area (ha) | Top 5 countries, total certified area

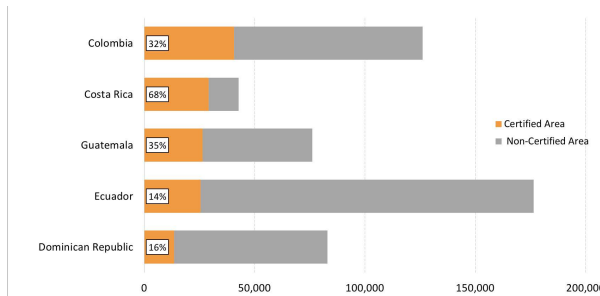


Fig 14 | FiBL (2018), FAO (2019), basis: 4-yr average of 2014-17

Top 5 producing countries

Production volume

- 1 India
- 2 China
- 3 Indonesia
- 4 Brazil
- 5 Ecuador

Top 5 exporting countries

Export volume

- 1 Ecuador
- 2 Costa Rica
- 3 Guatemala
- 4 Colombia
- 5 Philippines

Top 5 certified countries

Certified area

- 1 Colombia
- 2 Costa Rica
- 3 Guatemala
- 4 Ecuador
- 5 Dominican Republic

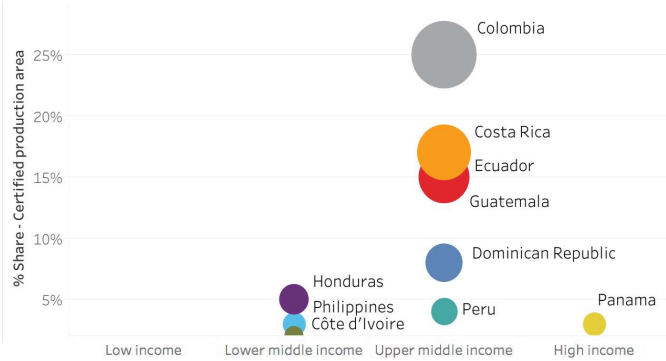
New certified presence between 2011–16

- Belize
- Brazil
- Cameroon
- Côte d'Ivoire
- Malawi
- Mexico

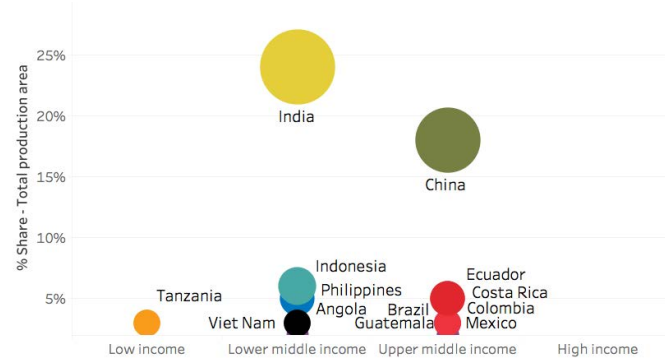
12% of ISEAL member scheme banana certification is in low and lower-middle income countries. While certification is primarily focused on Latin American in main export countries, ISEAL member schemes are present in the the lower middle-income countries Côte d'Ivoire , Honduras and the Philippines. A relevant low income producing country without certification is Tanzania.

Bananas | Share by country income level[†] - 2016

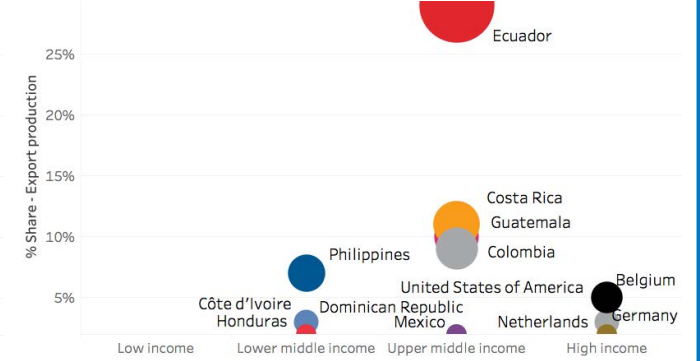
Certified production area



Total production area



Export production



[†]Countries with share <2% are hidden. These charts do not take multiple certification into account, so are only indicative of trends.

Fig 15 | FIBL (2018), FAO (2019), World Bank (2019))

Cocoa - countries with certification presence by the focus ISEAL schemes | 2011–16



Fig 16 | FIBL (2018), FAO (2019)

Cocoa certification, through the Fairtrade, Rainforest Alliance and UTZ schemes, was present in 24 countries in 2016 expanding into 5 new countries since 2011 and accounting for 28% of global harvested cocoa area. ISEAL member certification footprint is highest in the three largest cocoa producing countries: Côte d'Ivoire, Ghana and Nigeria.

Cocoa | Certified v non-certified area – 2016

Share and harvested area (ha) | Top 5 countries, total certified area

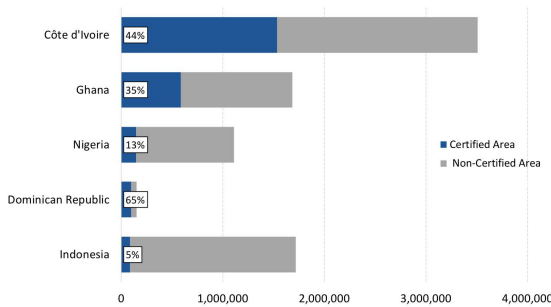


Fig 17 | FIBL (2018), FAO (2019), basis: 4-yr average of 2014-17

Top 5 producing countries

Production volume

- 1 Côte d'Ivoire
- 2 Ghana
- 3 Indonesia
- 4 Nigeria
- 5 Cameroon

Top 5 exporting countries

Export volume

- 1 Côte d'Ivoire
- 2 Ghana
- 3 Ecuador
- 4 Cameroon
- 5 Nigeria

Top 5 certified countries

Certified area

- 1 Côte d'Ivoire
- 2 Ghana
- 3 Nigeria
- 4 Dominican Republic
- 5 Indonesia

New certified presence

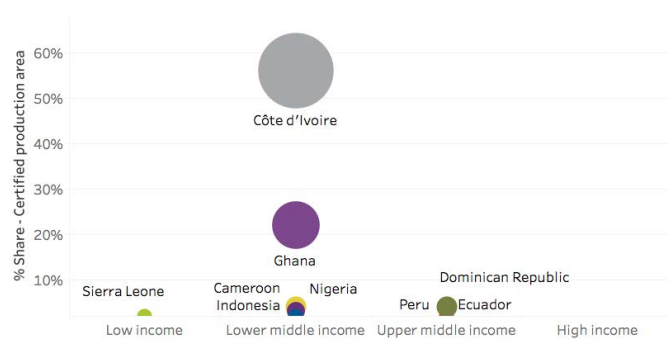
Between 2011–16

- Liberia
- Papua New Guinea
- Panama
- Togo
- Trinidad & Tobago

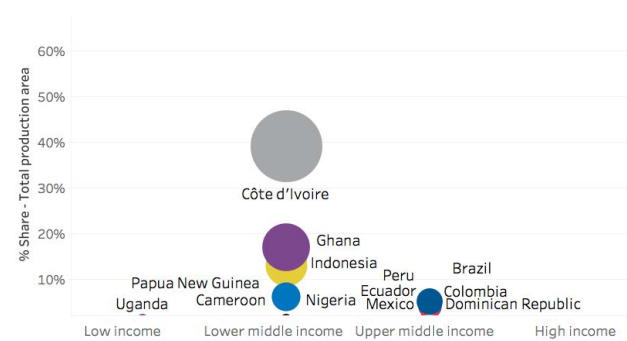
91% of ISEAL member scheme cocoa certification is in low and lower-middle income countries. Presence in the low and lower middle-income countries is in proportion to both the primary producing and exporting countries, namely in Côte d'Ivoire and Ghana. Indonesia, Cameroon and Nigeria are other prominent cocoa countries with lower middle-income classification.

Cocoa | Share by country income level[†] - 2016

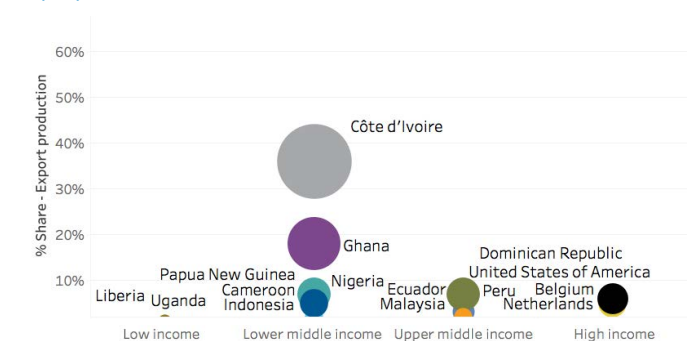
Certified production area



Total production area



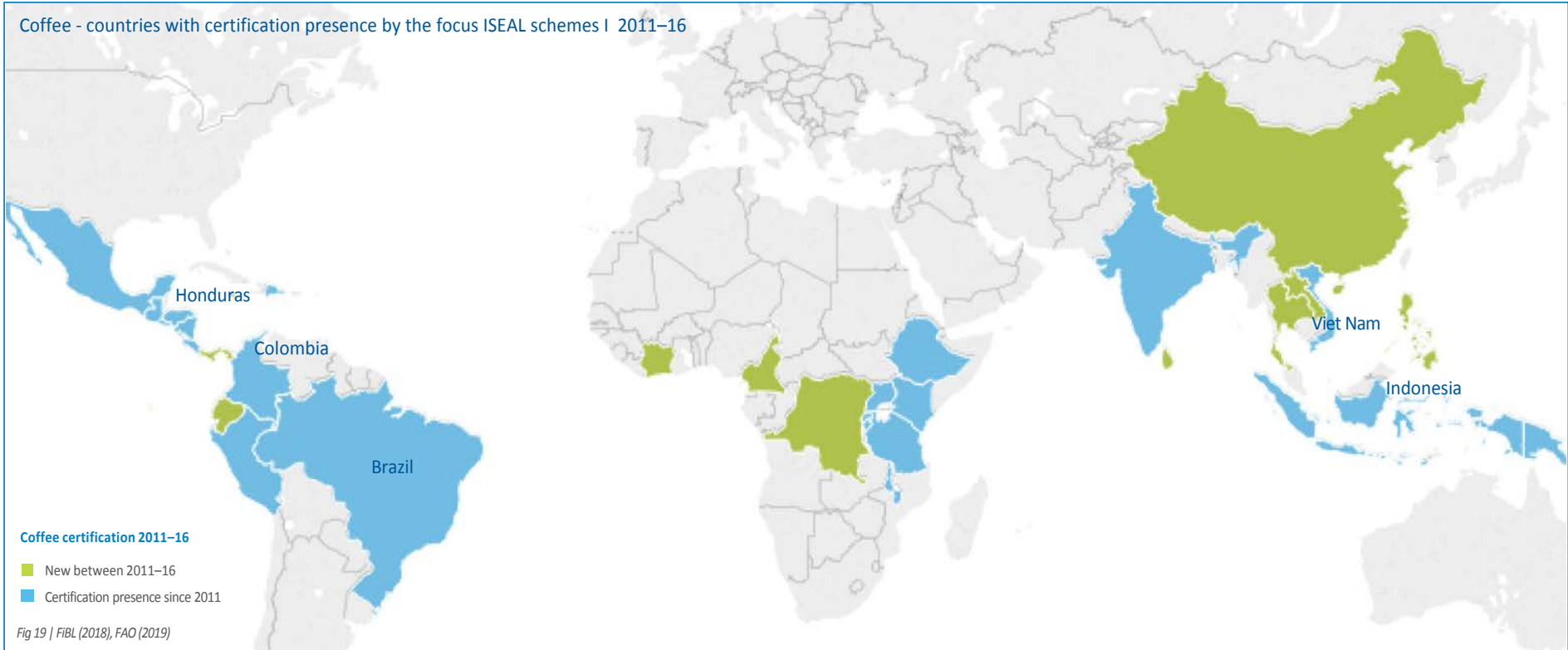
Export production



[†]Countries with share <2% are hidden. These charts do not take multiple certification into account, so are only indicative of trends.

Fig 18 | FIBL (2018), FAO (2019), World Bank (2019)

Coffee - countries with certification presence by the focus ISEAL schemes | 2011–16



Coffee certification, through the Fairtrade, GCP, Rainforest Alliance and UTZ schemes, was present in 33 countries in 2016 expanding into 11 new countries since 2011 and accounting for 27% of global harvested coffee area. ISEAL member certification footprint is highest in the three largest cocoa producing and exporting countries: Brazil, Colombia and Viet Nam.

Coffee | Certified v non-certified area – 2016

Share and harvested area (ha) | Top 5 countries, total certified area

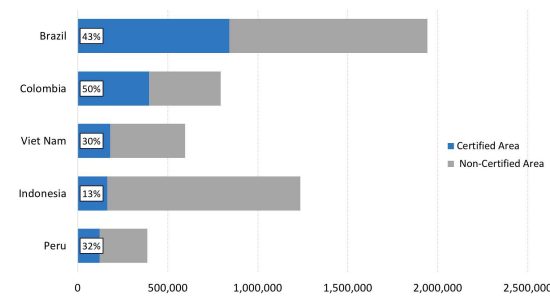


Fig 20 | FIBL (2018), FAO (2019), basis: 4-yr average of 2014-17

Top 5 producing countries

Production volume

- 1 Brazil
- 2 Viet Nam
- 3 Colombia
- 4 Indonesia
- 5 Honduras

Top 5 exporting countries

Export volume

- 1 Brazil
- 2 Viet Nam
- 3 Colombia
- 4 Indonesia
- 5 Honduras

Top 5 certified countries

Certified area

- 1 Brazil
- 2 Colombia
- 3 Viet Nam
- 4 Indonesia
- 5 Peru

New certified presence

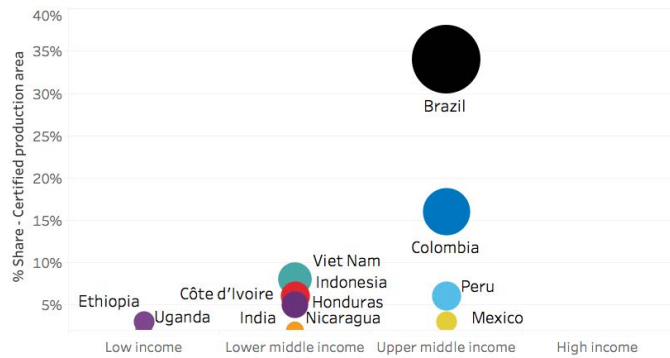
Between 2011–16

Cameroon	Laos
China	Panama
Côte d'Ivoire	Philippines
DR Congo	Sri Lanka
Ecuador	Thailand
Jamaica	

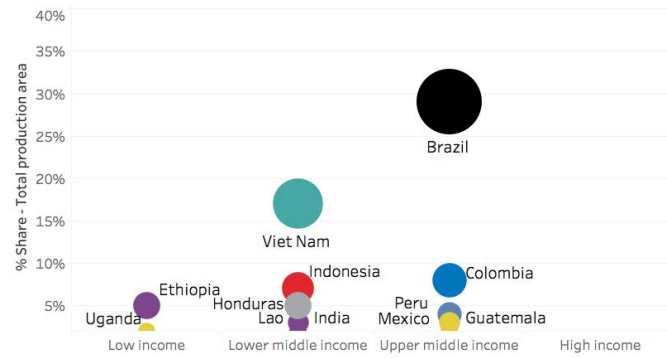
37% of ISEAL member scheme coffee certification is in the low and lower-middle income countries of Viet Nam, Indonesia, Ethiopia, Honduras, India and Uganda. While there is certification presence in the two largest low-income countries, Ethiopia and Uganda, production volumes remain low. 5

Coffee | Share by country income level † - 2016

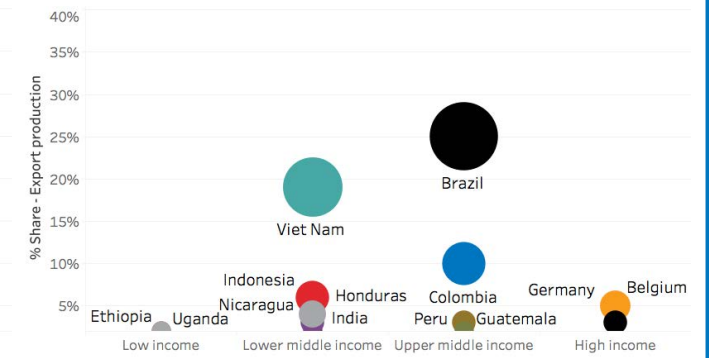
Certified production area



Total production area



Export production



†Countries with share <2% are hidden. These charts do not take multiple certification into account, so are only indicative of trends.

Fig 21 | FIBL (2018), FAO (2019), World Bank (2019)

Cotton - countries with certification presence by the focus ISEAL schemes | 2011–16

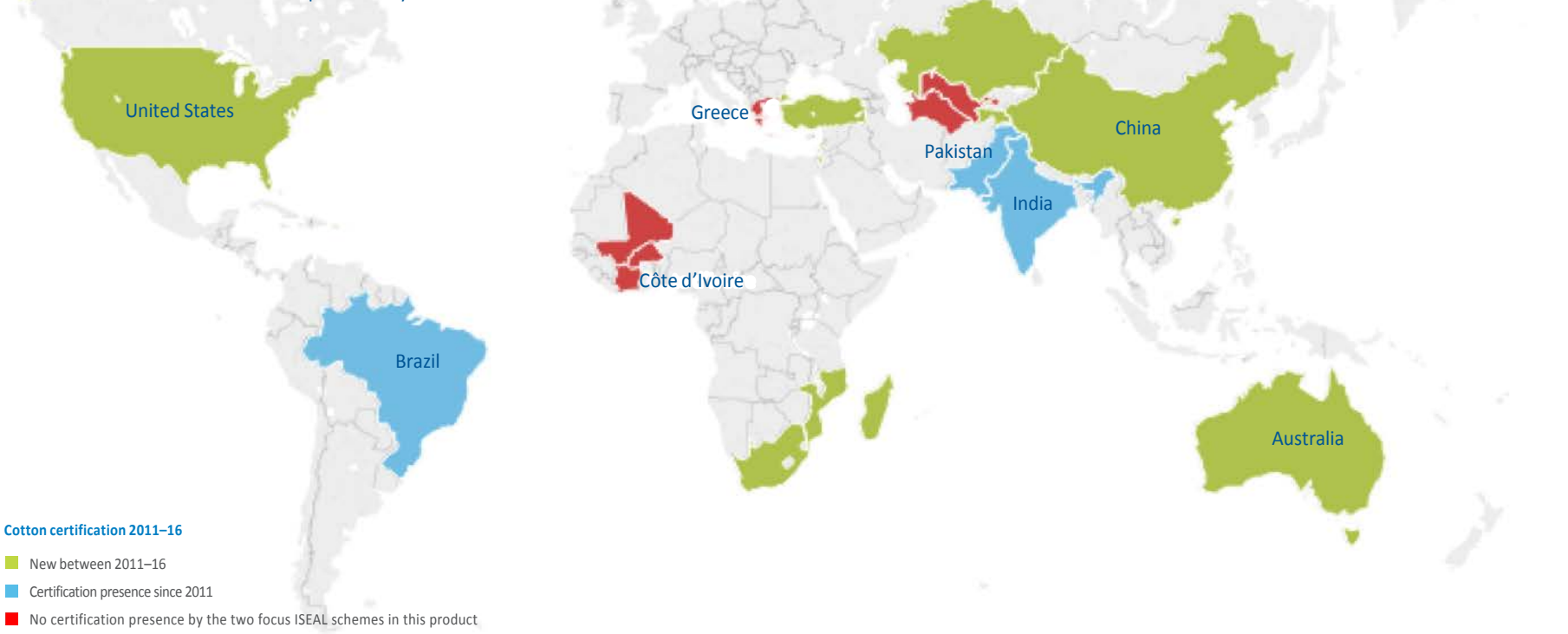


Fig 22 | FIBL (2018), FAO (2019)

Cotton certification, through the BCI and Fairtrade schemes, was present in 13 countries in 2016 expanding into 10 new countries since 2011 and accounting for 7% of global harvested cotton area. ISEAL member certification footprint is highest in India, China and Pakistan.

Cotton | Certified v non-certified area – 2016
Share and harvested area (ha) | Top 5 countries, total certified area

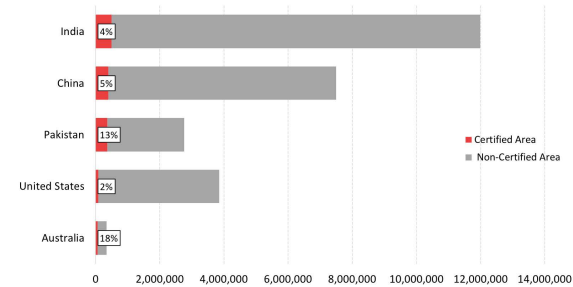


Fig 23 | FIBL (2018), FAO (2019), basis: 4-yr average of 2014-17

Top 5 producing countries

Production volume

- China
- India
- United States
- Pakistan
- Brazil

Top 5 certified countries

Certified area

- India
- China
- Pakistan
- United States
- Australia

Top 5 exporting countries

Export volume

- United States
- Greece
- Australia
- Brazil
- Côte d'Ivoire

New certified presence

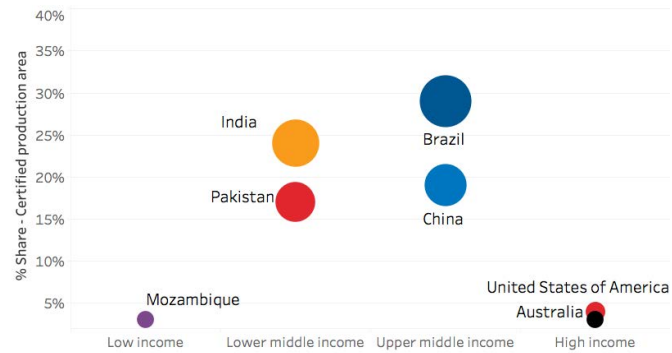
Between 2011–16

Australia	Mozambique
China	South Africa
Israel	Tajikistan
Kazakhstan	Turkey
Madagascar	United States

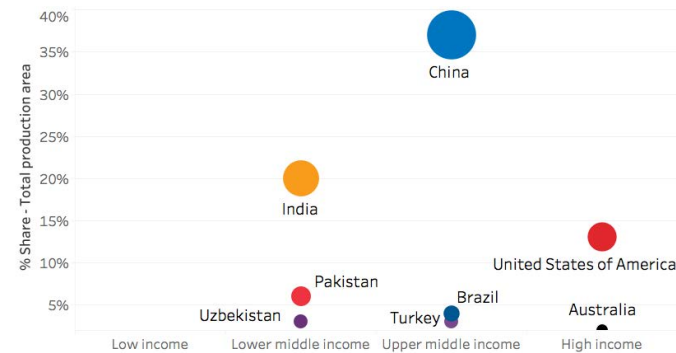
44% of ISEAL member scheme cotton certification is in low and lower-middle income countries. Cotton certification is strongest in Brazil, an upper middle-income country. However, presence is also strong in the two largest lower middle income producing countries, Pakistan and India. Mozambique, a low-income country, is a small export player that also has certification.

Cotton | Share by country income level[†] - 2016

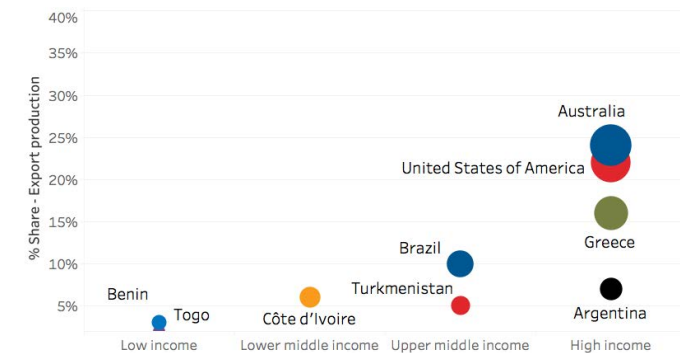
Certified production area



Total production area



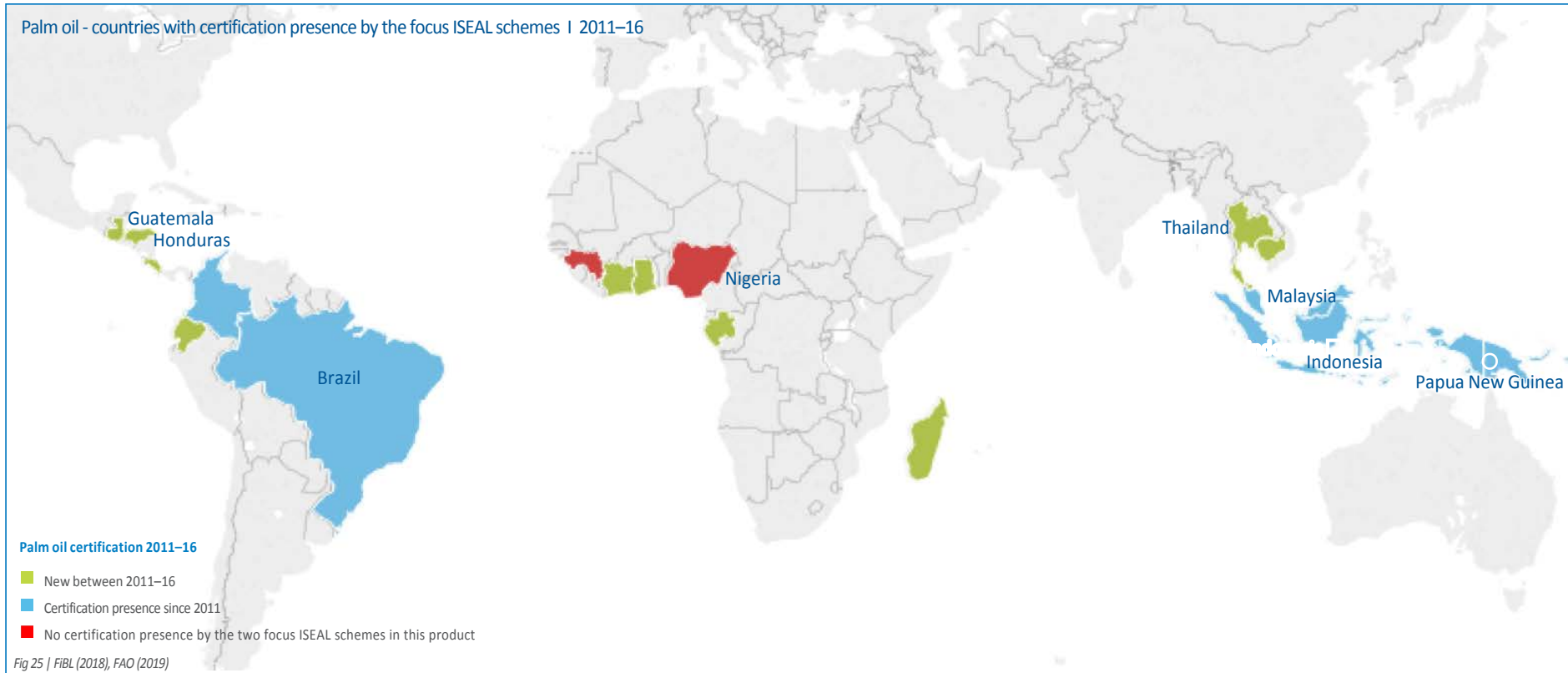
Export production



[†]Countries with share <2% are hidden. These charts do not take multiple certification into account, so are only indicative of trends.

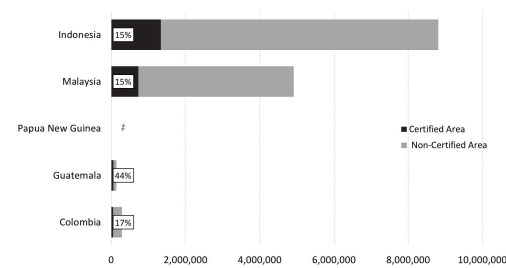
Fig 24 | FIBL (2018), FAO (2019), World Bank (2019)

Palm oil - countries with certification presence by the focus ISEAL schemes | 2011–16



Palm oil certification, through the RSPO and Rainforest Alliance schemes, was present in 16 countries in 2016 expanding into 10 new countries since 2011 and accounting for 12% of global harvested palm oil area. ISEAL member certification footprint is highest in the two largest producing and exporting countries: Indonesia and Malaysia.

Palm Oil | Certified v non-certified area – 2016
Share and harvested area (ha) | Top 5 countries, total certified area



Top 5 producing countries

Production volume

- 1 Indonesia
- 2 Malaysia
- 3 Thailand
- 4 Nigeria
- 5 Colombia

Top 5 exporting countries

Export volume

- 1 Indonesia
- 2 Malaysia
- 3 Papua New Guinea
- 4 Guatemala
- 5 Honduras

Top 5 certified countries

Certified area

- 1 Indonesia
- 2 Malaysia
- 3 Papua New Guinea
- 4 Guatemala
- 5 Colombia

New certified presence

Between 2011–16

Export volume	
Cambodia	Ghana
Costa Rica	Guatemala
Côte d'Ivoire	Honduras
Ecuador	Madagascar
Gabon	Thailand



62% of ISEAL member scheme palm oil certification is in the low and lower-middle income countries of Indonesia, Papua New Guinea, Honduras, Ghana, Cambodia and Côte d'Ivoire. The latter two not being major production or export countries. A lower middle income producing country lacking palm oil certification presence is Nigeria.

Palm Oil | Share by country income level[†] - 2016

Certified production area



Total production area



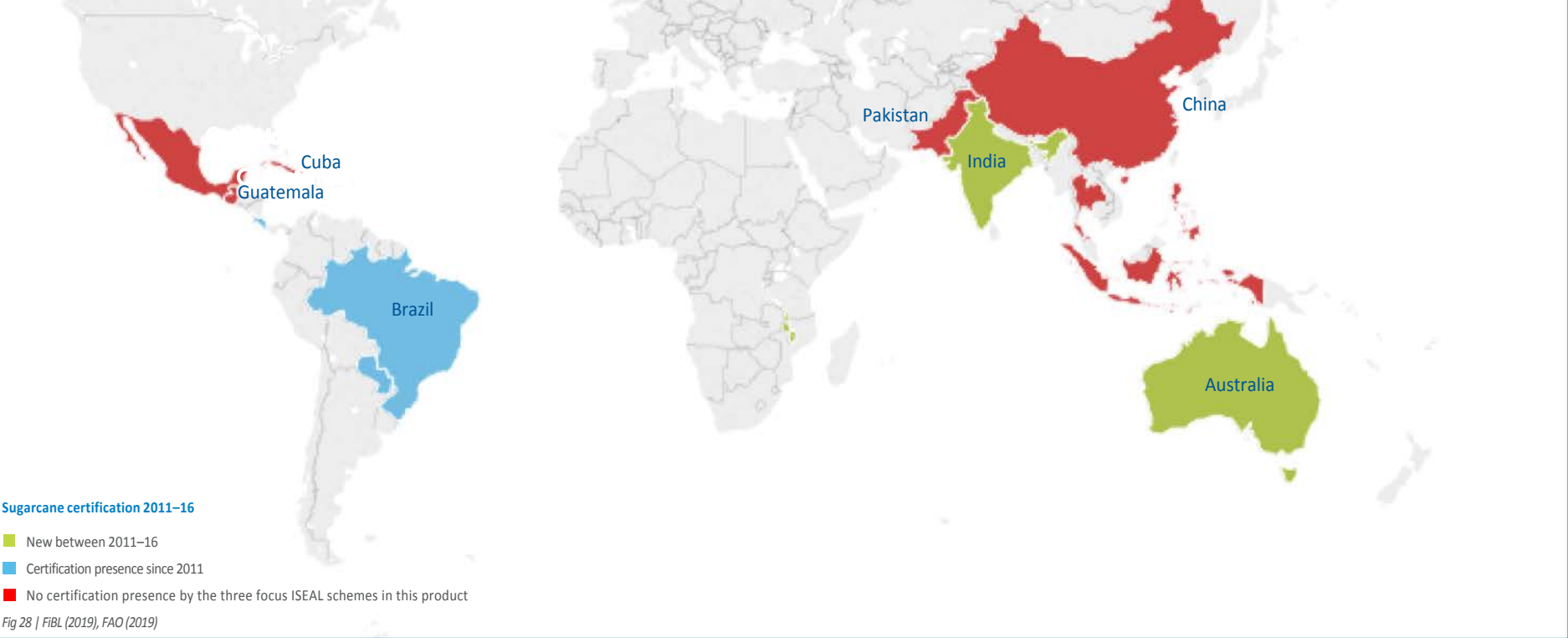
Export production



[†]Countries with share <2% are hidden. These charts do not take multiple certification into account, so are only indicative of trends.

Fig 27 | FIBL (2018), FAO (2019), World Bank (2019)

Sugarcane - countries with certification presence by the focus ISEAL schemes | 2011–16



Sugarcane certification, through the Bonsucro, Fairtrade and Rainforest Alliance schemes, was present in 7 countries in 2016 expanding into 3 new countries since 2011 and accounting for 14% of global harvested sugarcane area. ISEAL member certification footprint is highest in Brazil, the largest producing and exporting country.

Sugarcane | Certified v non-certified area – 2016
Share and harvested area (ha) | Top 5 countries, total certified area

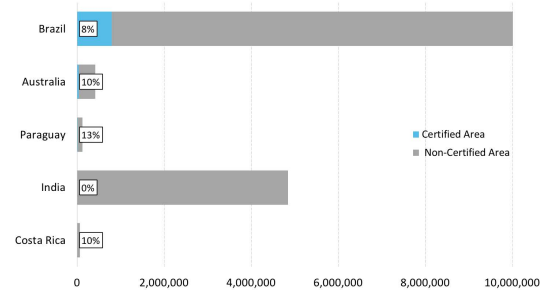


Fig 29 | FIBL (2018), FAO (2019), basis: 4-yr average of 20.

Top 5 producing countries

Production volume

- 1 Brazil
- 2 India
- 3 China
- 4 Thailand
- 5 Pakistan

Top 5 exporting countries

Export volume

- 1 Brazil
- 2 Australia
- 3 Thailand
- 4 Guatemala
- 5 Cuba

Top 5 certified countries

Certified area

- 1 Brazil
- 2 Australia
- 3 Paraguay
- 4 India
- 5 Costa Rica

New certified presence

Between 2011–16

- 1 Australia
- 2 India
- 3 Malawi

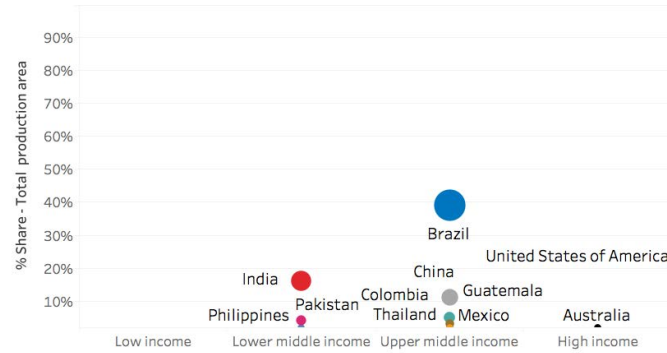
2% of ISEAL member scheme sugarcane certification is in the lower-middle income countries of Paraguay, India and Malawi. ISEAL member schemes are dominant in Brazil, the largest producing and exporting country in the world. The Philippines and Pakistan are relevant lower income export countries lacking certification.

Sugarcane | Share by country income level † - 2016

Certified production area



Total production area



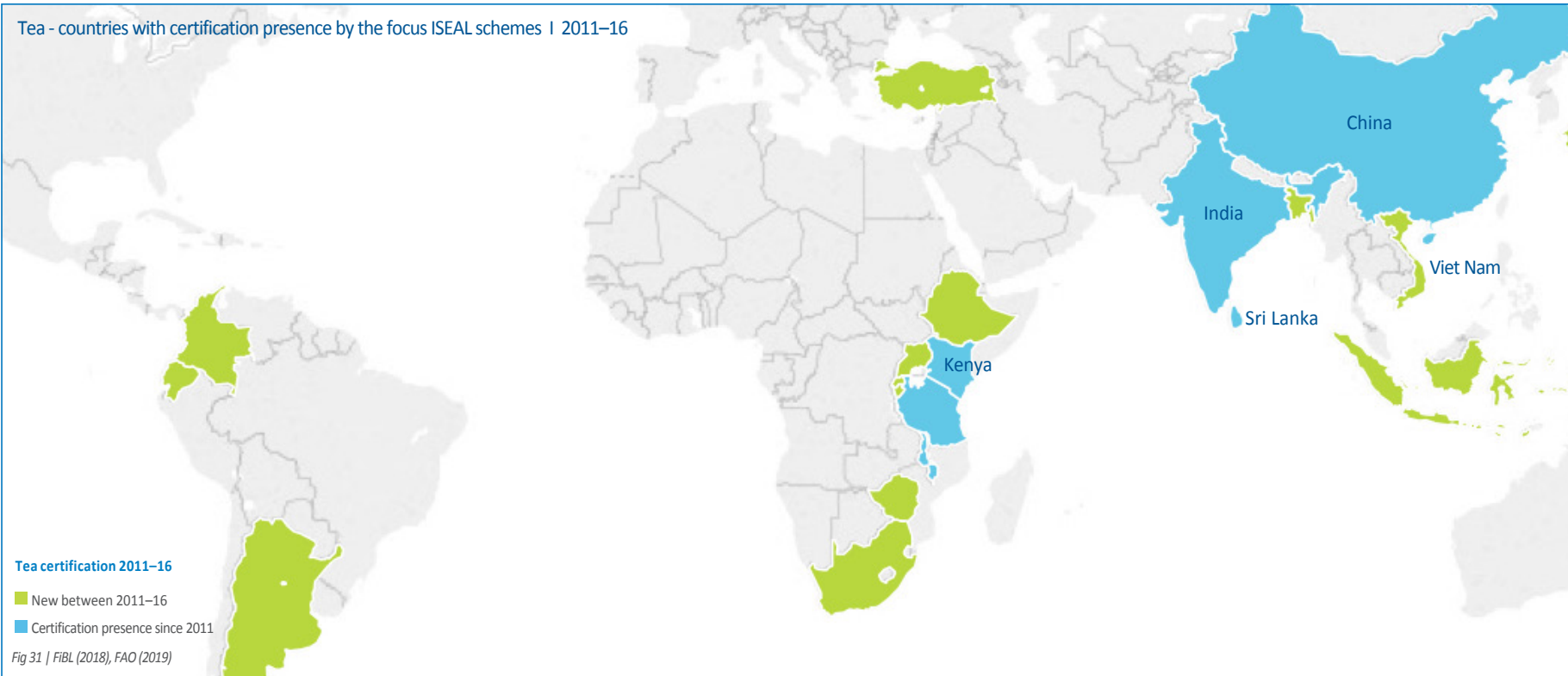
Export production



†Countries with share <2% are hidden. These charts do not take multiple certification into account, so are only indicative of trends.

Fig 30 | FIBL (2018), FAO (2019), World Bank (2019)

Tea - countries with certification presence by the focus ISEAL schemes | 2011–16



Tea certification, through the Fairtrade, Rainforest Alliance and UTZ schemes, was present in 22 countries in 2016 expanding into 16 new countries since 2011 and accounting for 3% of global harvested tea area. ISEAL member certification footprint is highest in Kenya, India and Sri Lanka.

Tea | Certified v non-certified area – 2016

Share and harvested area (ha) | Top 5 countries, total certified area

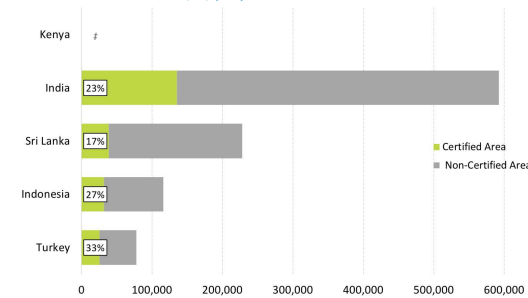


Fig 32 | FIBL (2018), FAO (2019), basis: 4-yr average of 2014-17

Top 5 producing countries

Production volume

- 1 China
- 2 India
- 3 Kenya
- 4 Sri Lanka
- 5 Viet Nam

Top 5 exporting countries

Export volume

- 1 China
- 2 Kenya
- 3 Sri Lanka
- 4 India
- 5 Argentina

Top 5 certified countries

Certified area

- 1 Kenya
- 2 India
- 3 Sri Lanka
- 4 Indonesia
- 5 Turkey

New certified presence

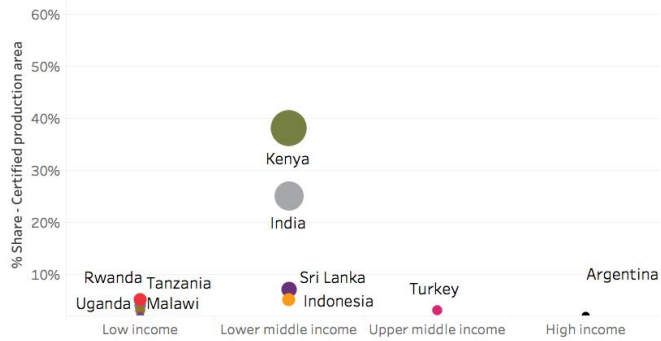
Between 2011–16

Argentina	Nepal
Bangladesh	Rwanda
Burundi	South Africa
Colombia	Taiwan
Ecuador	Turkey
Ethiopia	Uganda
Indonesia	Viet Nam
Japan	Zimbabwe

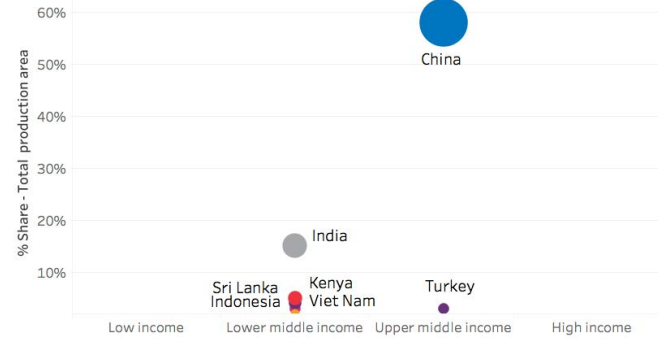
93% of ISEAL member scheme tea certification is in low and lower-middle income countries. ISEAL member scheme footprint in Malawi, Tanzania, Uganda and Rwanda have greater than 2% share of certified production, which is higher than the share of global tea production. Tea certification is lagging behind in China.

Tea | Share by country income level † - 2016

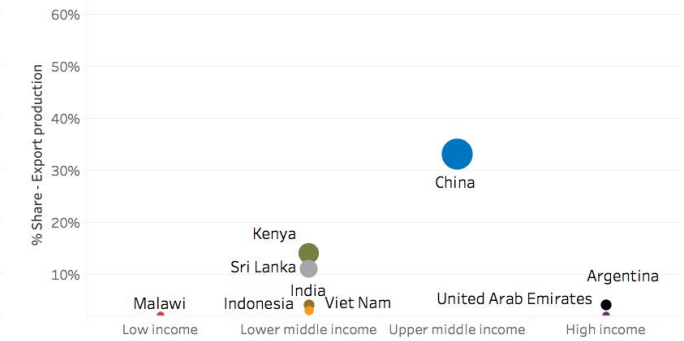
Certified production area



Total production area



Export production



†Countries with share <2% are hidden. These charts do not take multiple certification into account, so are only indicative of trends.

Fig 33 | FIBL (2018), FAO (2019), World Bank (2019)

Seven key insights about the presence and growth trends of key ISEAL agricultural schemes

1

ISEAL member schemes are rising in global presence and relevance in many agricultural sectors with their certification footprint.

2

Area under certification is expanding in all seven commodities analysed for the seven schemes collectively with harvested area certified tripling from 2011 – 2016. There are important differences in the growth rate between commodities and schemes over this period with growth rates peaking in 2012 and 2013 and plateauing thereafter.

3

The focus ISEAL schemes have a collective production presence in 62 countries across the seven commodities. Schemes are expanding into new countries - prominent ones being Australia (sugarcane), China and Mozambique (cotton), Indonesia (tea) and Guatemala and Costa Rica (palm oil) and Côte d'Ivoire (coffee).

4

Although their global presence is expansive, six countries account for 66% of total certified area for the seven commodities and schemes: Brazil, Côte d'Ivoire, Ghana, India, Indonesia and Malaysia. It is these countries that are driving growth in combined harvested area certified under the schemes between 2011 and 2016.



5

Data indicates an interesting trend in the consolidation of agricultural certification across commodities in a few key countries such as Brazil, India and Costa Rica. The percentage of countries with multiple commodities certified is rising, indicating a deepening presence by these schemes.

6

49% of the global certified production of the seven commodities takes place in low and lower-middle income countries. Presence is stronger in lower income countries than the lowest income countries producing these commodities.

7

Focus ISEAL schemes expanded their presence into more low and lower income countries from 2011 to 2016 across these commodities. Key low-income countries with no presence from these ISEAL schemes are Tanzania (bananas), Uzbekistan (cotton), Nigeria (palm oil) and Pakistan (sugarcane).

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