

SAFE Agricultural Trade Facilitation through economic integration in the Pacific Project (SAFE Pacific) project.

Final Report

Assessment of priority market certification programmes

Prepared By

Jon Manhire

Managing Director

The AgriBusiness Group

P.O Box 85016

Lincoln University, Lincoln, 7647

New Zealand

Website www.agribusinessgroup.com

Email jon@agribusinessgroup.com

August 2022

SAFE PACIFIC

Safe Agricultural trade Facilitation
through Economic integration in the Pacific



Table of Contents

TABLE OF CONTENTS	2
LIST OF ACRONYMS	3
EXECUTIVE SUMMARY	5
1.0 BACKGROUND	6
1.1 OUTLINE	6
1.2 VOLUNTARY MARKET CERTIFICATION PROGRAMMES	7
2.0 LITERATURE AND INFORMATION REVIEW	9
2.1 BACKGROUND TO MARKET CERTIFICATION PROGRAMME	9
2.1.1 <i>Drivers for adoption</i>	9
2.1.2 <i>Market certification programmes – issues and opportunities</i>	10
2.2 MARKET CERTIFICATION PROGRAMMES – ORGANISATION AND INITIATIVES	11
2.2.1 FOOD SAFETY CERTIFICATION PROGRAMME	11
2.2.2 <i>Sustainability certification programmes organisations</i>	16
2.2.3 <i>SAFE country relevant organisations</i>	20
2.2.4 <i>Pacific market certification projects</i>	22
4.0 ANALYSIS.....	25
4.1 ANALYSIS OF PROGRAMMES BY MARKET CERTIFICATION TYPE.....	25
4.1.1 <i>Food safety programmes</i>	25
4.1.2 <i>Organic certification</i>	27
4.1.3 <i>Fair Trade</i>	30
4.1.4 <i>GLOBALG.A.P.</i>	32
4.1.5 <i>Other options</i>	33
4.2 ANALYSIS BY PRODUCT.....	34
4.2.1 <i>Agricultural and Horticultural products</i>	34
4.2.2 <i>Seafood</i>	35
4.2.3 <i>Coffee</i>	36
4.2.4 <i>Cocoa</i>	37
4.2.5 <i>Kava</i>	38
4.2.6 <i>Tumeric</i>	39
5.0 CONSULTATION	40
5.1 BACKGROUND.....	40
5.2 SURVEY RESULTS.....	40
APPENDIX 1 LIST OF SURVEY RESPONDENTS	45

List of Acronyms

ACP	African Caribbean Pacific
B2B	Business to business
BRC	British Retail Consortium
CAB	Conformity Assessment Bodies
EU	European Union
FACT	Facilitating Agriculture Commodity Trade
FAO	Food and Agriculture Organization of the United Nations
FDA	United States Food and Drug Administration
FLO	Fairtrade Labelling Organisation
FSANZ	Food Standards Australia New Zealand
FSC	Forest Stewardship Council
FSSC	Food Safety System Certification
GAP	Good Agricultural Practice
GAQSIQ	General Administration of Quality Supervision, Inspection, and Quarantine
CGF	Consumer Goods Forum
GHP	Good Hygiene Practices
GFSI	Global Food Safety Initiative
GMP	Good Manufacturing Practices
GRI	Global Reporting Initiative
HACCP	Hazard Analysis and Critical Control Point
IAF	International Accreditation Forum
IACT	Increasing Agricultural Commodity Trade
IFAD	International Fund for Agricultural Development
IFOAM	International Federation of Organic Movements
IISD	International Institute for Sustainable Development
ISEAL	International Social and Environmental Accreditation and Labelling Alliance
ITC	International Trade Centre
ISO	International Standards Organisation
IFOSAN	The International Food Safety Authorities Network
JAS-ANZ	Joint Accreditation System of Australia and New Zealand
LRD	Land Resources Division
MSC	Marine Stewardship Council
MSME	Micro, Small & Medium Enterprise's
MSI	Multi Stakeholder Initiatives
SPC CSA	Pacific Community Climate Smart Agriculture
PAPP	Pacific Agriculture Policy Project
PAFTS	Pacific Aid-for-Trade Strategy
POETCom	Pacific Organic and Ethical Trade Community
PHAMA	Pacific Horticultural and Agricultural Market Access
PIFON	Pacific Farmers Organisation Network
PIPSO	Pacific Islands Private Sector Organization
PNG	Papua New Guinea
PRISE	Pacific Regional Integration Support'
RA	Rainforest Alliance
SAFE	Safe Agricultural Trade Facilitation through Economic integration
SDG	Sustainable Development Goals
SGS	Standard Global Services
SLDB	Small and/or Less-Developed Business
SPC	Pacific Community

SPREP	Secretariat of the Pacific Regional Environment Programme
SSI	State of Sustainability Initiatives
SSCI	Sustainable Supply Chain Initiative
SQF	Safe Quality Food Institute
UNCTAD	United Nations Council of Trade and Development
UNECE	United Nations Economic Commission for Europe
UNFSS	United Nations Forum for Sustainability Standards
UNIDO	United Nations Industrial Development Organisation
UNITC	United Nations International Trade Centre
VSS	Voluntary sustainability standards
WHO	World Health Organisation
WTO	World Trade Organisation
WWF	World Wildlife Fund

Executive Summary

1. The Safe Agricultural Trade Facilitation through Economic integration (SAFE) in the Pacific project aims to increase export capacity and improve economic growth. The key focus of SAFE is to address the barriers in accessing export markets, enhance the production of value-added products and improve compliance with international standards. This project is a component of SAFE that is looking to strengthen the competitiveness of sustainable agricultural value-chains in the Pacific by working with Micro, Small & Medium Enterprise's. This report has been prepared as part of project *task 2.3.2.2 Assess priority voluntary standards for Pacific exporters (e.g., Organic, HACCP, ISO, Fair Trade, Single Origin, GAP)*.

2. The report provides a background to voluntary market certification programmes and segments into two types – Food Safety and Sustainability certification programmes. It explores the regulatory and market relationships for these programmes as well as the process for certification of the programmes.

3. Background information is provided on the drivers, issues and opportunities related to market certification programmes. Key drivers for the adoption of market certification are explored included: the need to provide verification on the safety of food, the sustainability of the production of food, to enable market access and to address consumer demands. Issues and opportunities related to market certification programmes including a review of their impact and trends in the harmonisation of standards. Information is also provided on key organisations and their roles in relation to the provision of food safety and sustainability programmes. This includes a review of organisations, projects, and initiatives in the Pacific and specifically in the countries that the SAFE project is working in.

4. An analysis of possible market certification programmes is provided by market certification type. This includes a review of programme associated with:

- Food safety
- Organic product certification
- Fair trade certification
- GLOBAL Gap certification
- Other possible options

This includes background information on the programme, their comparative impact in relation to UN Sustainable Development Goals, their current use in the Pacific, certification providers as well as references to local projects and initiatives.

5. An analysis of market certification by product type is provided. This includes an analysis for the four SAFE focal crops – Coffee, Cocoa, Kava and Turmeric. This includes background information on the crops, sustainability certification as well as the current situation in relation to the use of market certification in the Pacific.

6. The report concludes with an introduction on a stakeholder survey to obtain feedback on the current use of market certification programmes in the SAFE countries and the level of interest in the various programmes. The information gathered in the preparation of this report has informed the selection of the following market certification programmes to be investigated to clarify opportunities for the establishment of local auditor capabilities to be developed by this project.

- Food safety
- Fairtrade
- Rainforest Alliance
- Organic
- Sustainable Fisheries – Marine Stewardship Certification (MSC)

1.0 Background

1.1 Outline

The Safe Agricultural Trade Facilitation through Economic integration (SAFE) in the Pacific project aims to increase export capacity and improve economic growth. SAFE Pacific is part of a larger EU-funded 'Pacific Regional Integration Support' (PRISE) programme and is implemented in 15 Pacific countries (Cook Islands, Federated States of Micronesia, Fiji, Kiribati, Marshall Islands, Nauru, Niue, Palau, Papua New Guinea, Samoa, Solomon Islands, Timor Leste, Tonga, Tuvalu, and Vanuatu).

The key focus of SAFE is to address the barriers in accessing export markets, enhance the production of value-added products and improve compliance with international standards. This project is a component of SAFE that is looking to strengthen the competitiveness of sustainable agricultural value-chains in the Pacific by working with Micro, Small & Medium Enterprise's (MSME), producer clusters and industry facilitators including the providers of market certifications. This project is associated with Output 2.3.2 of the project.

Output 2.3.2 Strengthen access to market certification (environmental, sustainable, organic etc.). This is necessary because market certification is needed to access high value niche markets, it also promotes environmentally friendly production practices in a manner that can be effectively monitored. This will develop and sustain a network of locally based advisors and auditors for food safety and marketing certifications and assist businesses meet requirements for certifications. The project will involve training and technical assistance.

Project Scope

The project covers

- The certification of horticulture, agriculture, and seafood products. There is also a focus on selected high-value products (Kava, coconut, coffee, and turmeric).
- Voluntary certification programmes for food safety and marketing certifications.
- The project will be implemented in all the 15 Pacific ACP Countries (Cook Islands, Federated States of Micronesia, Fiji, Kiribati, Marshall Islands, Nauru, Niue, Palau, Papua New Guinea, Samoa, Solomon Islands, Timor Leste, Tonga, Tuvalu, and Vanuatu)

This report has been prepared as part of project *task 2.3.2.2 Assess priority voluntary standards for Pacific exporters (e.g., Organic, HACCP, ISO, Fair Trade, Single Origin, GAP)*. This report reflects the completion of Output 1 for the contracted activity for this project.

Project task 2.3.22 Output 1 *A report reviewing and analysing the potential voluntary market certification programmes for inclusion in the project will be prepared and circulated to the project governance and consultation group.*

The preparation of this report has been supported through:

- A review of literature and other information.
- A review of relevant Pacific value chain and market development projects.
- An analysis of voluntary market certification schemes by product.
- An analysis of voluntary market certification schemes by type.

The report provides a summary of findings and recommends a short list of voluntary market certification programmes that could be included in the project. It is planned that a subsequent stakeholder survey will confirm these focal market certification programmes.

A range of tools and resources supported the preparation of this report including:

- United Nations International Trade Centre (UNITC) – including the ITC Standards Map¹ and Trade Map.
- United Nations Council of Trade and Development (UNCTAD)² - this organisation supports the selection and use of Voluntary Sustainability Standards (VSS) in developing countries. It has developed resources to support this including the VSS assessment toolkit³.
- Pacific data hub⁴ - a central repository of data about the Pacific and from the Pacific.

The report segments market certification programmes into two types reflecting the different scope and history of development. It is however recognised that there is often an overlap between these types of programmes.

1. **Food safety certification programmes** are established to manage the handling, preparation, and storage of food in ways that prevent food-borne illness.
2. **Sustainability certification programmes** – these are used by producers, manufacturers, traders, retailers, and service providers to demonstrate their commitment to good environmental, social, and ethical production – some may also address food safety

1.2 Voluntary market certification programmes

The provision of assurances on the quality or the attributes of a product or production system from which it was produced, has evolved rapidly over the last 20 years with the increased demand from discerning consumers who want assurance regarding the intrinsic and extrinsic attributes of what they consume. However, quality assurance has historical origins in China and in other regions such as the assurances provided by Guilds in medieval Europe.

Figure 1 provides an overview of how assurances are provided in the voluntary sector (i.e., industry) and the regulated sector (i.e., government) and the process used for conformity assessment/assurance for customers.

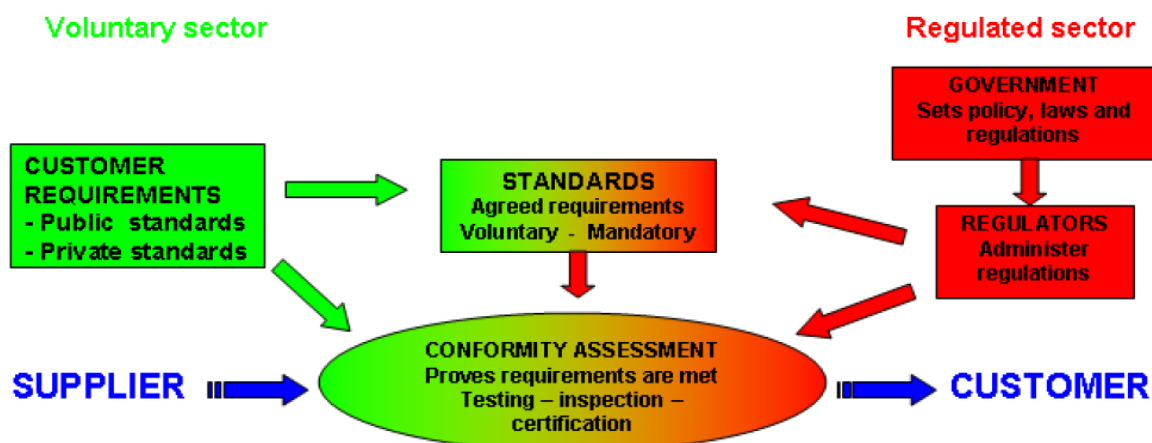


Figure 1 Relationships between voluntary and regulatory sectors and standards⁵

In relation to the voluntary sector - requirements are often set by the customer, but there is no legal requirement to comply and requirements cannot be challenged through World Trade Organisation

¹ <https://www.standardsmap.org/en/home>

² <https://vssapproach.unctad.org>

³ <https://vssapproach.unctad.org/toolkit/>

⁴ <https://pacificdata.org>

⁵ Russ M, Manhire J et al. - 'Environmental Assurances Research Report' prepared for MAF 2009

(WTO) rules-based processes. Failure however to meet customer specifications will probably result in the loss of the sale. Regulatory requirements are legally enforceable.

Both the regulated and voluntary sectors rely on standards or agreed specifications and on internationally accepted conformity assessment procedures.

- Conformity Assessment Bodies (CABs) are organisations who provide certification and/ or inspection services.
- Accreditation is an endorsement of a CAB's competence, credibility, independence and integrity in carrying out its conformity assessment activities.
- Certification - determines whether products, processes, systems or persons meet requirements.
- Standards - are documents, established by consensus and approved by a recognized body that provides, for common and repeated use, rules, guidelines or characteristics for activities or their results, aimed at the achievement of the optimum degree of order in a given context.
- In relation to those addressing sustainability these are often called Voluntary Sustainability Standards (VSS). The UN Forum for Sustainability Standards (UNFSS⁶) defines VSS as: *"...standards specifying requirements that producers, traders, manufacturers, retailers or service providers may be asked to meet, relating to a wide range of sustainability metrics, including respect for basic human rights, worker health and safety, environmental impacts, community relations, land-use planning and others"* (UNFSS 2012).

There are three main methods of assessing conformance:

- First-party – self-declaration of conformity to a particular standard. This may be acceptable for low-risk products and may need to be supported by a technical file containing justification for the declaration.
- Second-party – assessment by a customer or other interested party to ensure that the product or process meets their requirements.
- Third-party – an objective assessment by a technical expert or organisation that is independent of the producer and the customer.

Third-party assessment is the most credible, and most common, method of confirming that a product, system or process complies with a standard. It provides both the supplier and the customer with the added assurance that compliance has been independently verified.

Accreditation

Third-party conformity assessment is carried out by independent inspection bodies and certification bodies. Accreditation is the process of ensuring that these inspection bodies and certification bodies are themselves competent to conduct specific assessments. It is the checking of the checkers. Accreditation bodies must be independent of the bodies they are assessing (third-party) and must also apply recognised standards to assess competence.

⁶ <https://unfss.org>

2.0 Literature and information review

This section of the report has been prepared from information collected from an internet and literature review. It is segmented into the following sections:

- 2.1 Background to market certification programmes – drivers, issues and opportunities
- 2.2 Market certification programmes – organisation and initiatives.

2.1 Background to market certification programme

2.1.1 Drivers for adoption

There are a number of drivers for the adoption of market certification programmes.

Food Safety

Access to sufficient amounts of safe and nutritious food is key to sustaining life and promoting good health. Unsafe food containing harmful bacteria, viruses, parasites or chemical substances causes more than 200 diseases, ranging from diarrhoea to cancers. It also creates a vicious cycle of disease and malnutrition, particularly affecting infants, young children, elderly and the sick. Good collaboration between governments, producers and consumers is needed to help ensure food safety and stronger food systems. (WHO⁷). A wide range of policies, regulations and certification programmes have been established to manage food safety risks. Compliance with these and providing food safety assurance is a requirement for access to all high value markets.

Sustainability

The intensification of agriculture has led to increasing degradation of land, water, and biodiversity on a global scale. The increasing global population and degradation of agricultural land has increased the pressure on land resources. Achieving an increase in food production to supply global markets, while simultaneously maintaining biodiversity and ecosystem services and meeting consumer and citizen expectations, is a serious challenge. (Bissinger (2020)⁸).

Over the last 20 years Voluntary Sustainability Standards (VSS) have become a common instrument used by businesses, civil society organisations and (less often) governments to establish, incentivise and enforce private sector commitments to sustainable development. There are now a large number of sustainability standards and certification programmes. The UNITC Standards Map⁹ lists 324 – while the Ecolabel Index¹⁰ lists 456 labels in 199 countries. Generally there are two types of sustainability assurance programmes;

- Consumer sustainability assurance – these target and provide consumers with assurance regarding the sustainability credentials of a product. They typically have a visible label/logo to facilitate recognition.
- Business to business (B2B) sustainability assurance – these operate in product value chains and provide assurance of the sustainability credentials of a product. They do not necessarily have a visible label or logo.

There is a wide range of integrity in relation to the credibility of the sustainability claims associated with different programmes – with some little more than greenwashing¹¹ – while others with 3rd party certification have significantly more integrity.

⁷ <https://www.who.int/news-room/fact-sheets/detail/food-safety>

⁸ Bissinger, K., Brandi, C., Cabrera de Leicht, S., Fiorini, M., Schleifer, P., Fernandez de Cordova, S., Ahmed, N. (2020). Linking Voluntary Standards to Sustainable Development Goals. International Trade Centre, Geneva, Switzerland.

⁹ <https://www.standardmap.org/en/identify>

¹⁰ <https://www.ecolabelindex.com>

¹¹ Greenwashing is the process of conveying a false impression or providing misleading information about how a company's products are more environmentally sound. <https://www.investopedia.com/terms/g/greenwashing.asp>

Market access - environmental regulations and policies.

Many countries have adopted environmental policies and regulations to address environmental issues such as facilitating the transition to a low carbon economy. In this area the European Union has been the most proactive with the most recent climate policy package (*European Green Deal*) revamping almost all of its climate legislation and complementing it with additional measures. Its 2030 *Climate Target Plan* aims to reduce emissions by at least 55% by 2030 while the *Farm to Fork Strategy* is at the heart of the European Green Deal aiming to make food systems fair, healthy, and environmentally friendly. These may create market access issues for example:

- Production assurance – compliance with more robust sustainability assurance programmes controlled by governments (EU) or the private sector may be required.
- The potential establishment of tariffs on emissions-intensive products such as proposed in US *Border Carbon Adjustment* and various EU initiatives. Though initially targeted at energy intensive products they could be more widely applied.

Consumer demand

in more affluent markets there are consumers that make their purchasing decisions based on non-tangible attributes of food for example the sustainability of the production systems and the protection of environmental and social values. A wide range of VSS and assurance programmes have been established to provide assurance to consumers of these attributes. They include:

- Holistic sustainability assurance such as organic and fair trade assurance.
- Commodity specific assurance such as those developed for specific value chains such as coffee and cocoa.
- Environmental specific assurance such as those providing assurance of the carbon or water footprint for a product.

2.1.2 Market certification programmes – issues and opportunities

There are a range of issues in relation to the operation of market certification programmes including:

Impact

The positive impacts in assuring safe food have been well established for well managed food safety programmes. The positive impacts associated with the use of sustainability market certification programmes is however less clear. There have been a number of studies that have looked at the relative impact with mixed reports for VSS in general and for some specific programmes. A 2020 report (MSI 2020¹²) was scathing in relation to the comparative value of Multi Stakeholder Initiatives '*MSIs are not effective tools for holding corporations accountable for abuses, protecting rights holders against human rights violations, or providing survivors and victims' with access to remedy*'. Another recent report (IISD 2021¹³) stated that '*Even though VSSs have been operating for more than three decades, the extent to which they are effective in reducing poverty is still the subject of discussion and ongoing research, and there is still no common understanding of how poverty in agriculture is defined. Concerns also remain about whether and how VSSs are able to reach poorer smallholder farmers, which is critical for successful poverty reduction*'. Possibly the relative impact of a sustainability certification programme could be considered in relation to the selection of programmes to be incorporated into this project.

¹² MSI Integrity, *Not Fit-for-Purpose: The Grand Experiment of Multi-Stakeholder Initiatives in Corporate Accountability, Human Rights and Global Governance*, July 2020.

¹³ Elder, S., Wilkings, A., Larrea, C., Elamin, N., & Fernandez de Cordoba, S. (2021). *State of Sustainability Initiatives Review: Standards and Poverty Reduction*. International Institute for Sustainable Development (IISD). <https://www.iisd.org/publications/ssi-initiatives-review-standards-poverty-reduction>

Evolution and scope

The development of VSS is very dynamic as reflected in the role VSS can have to further equal participation by both genders in economic decision making; as instruments for women's health, safety and well-being and as tools for sustainability reporting. The [UNECE "Gender Responsive Standards Initiative"](#) is one initiative that has explored this. A 2019 report published by the UNECE [Gender Responsive Standards](#)¹⁴ included reviews of some VSS in relation to how gender perspectives have been integrated into the content and implementation of the VSS, and the extent to which the VSS have helped promote gender equality and the empowerment of women. It identifies that VSS are rarely designed with gender equality as a key aim, and many do not have any specific reference to gender equality. Another useful resource is the report prepared by the IISD [Leveraging Voluntary Sustainability Standards for Gender Equality and Women's Empowerment in Agriculture: A Guide for Development Organizations Based on the Sustainable Development Goals](#).

Harmonisation of Standards

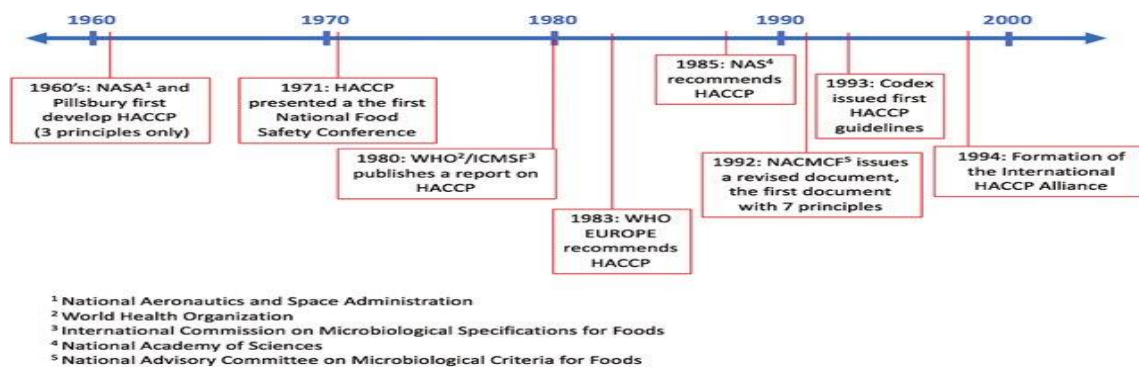
There are a large number of market certification programmes which can create confusion in relation to the scope and integrity of the certification programme. In relation to food safety there are a number of systems in place to harmonise the scope and integrity of the programmes through reference to international regulatory (Codex), regional (EU) and national regulatory standards. This is absent to a large degree with sustainability assurance programmes. There is significant competition between many sustainability certification programmes with limited systems in place to harmonise reporting and transparency requirements for certified producers. In some situations this has required producers to be certified to more than one standard.

2.2 Market certification programmes – organisation and initiatives

2.2.1 Food Safety certification programme

Food safety management and assurance systems along supply chain ensure that food businesses can keep food safe. This set of preventative controls may include Good Agricultural Practices (GAP), Good Manufacturing Practices (GMPs), Good Hygiene Practices (GHPs) and Hazard Analysis and Critical Control Point (HACCP) systems. Small scale producers and traders in developing countries need support in planning and implementing food safety management programmes in line with internationally recognized standards. [FAO](#) promotes the application of preventive food safety management systems by food business operators along the food chain in line with Codex guidelines and recommendations.

There has been significant development and implementation of food safety programmes over the last 60 years as illustrated in Figure 2.



¹⁴ Gender Responsive Standards (ECE/TRADE/445) <https://unece.org/info/publications/pub/2467>

Figure 2 History development and current status of food systems worldwide¹⁵.

Together with GHP, HACCP is recognized as an appropriate and useful tool for enhancing the safety of food products and providing adequate food safety assurance.

Hazard Analysis and Critical Control Point HACCP is a systematic preventive approach to food safety from biological, chemical, and physical hazards in production processes that can cause the finished product to be unsafe and designs measures to reduce these risks to a safe level. It is an internationally recognised system used to identify and manage significant food safety hazards, and ensure food safety for a business (The principles of the HACCP system have been adopted by the Codex Alimentarius Commission and guidelines to its application are provided in an Annex to the General Principles of Food Hygiene (FAO and WHO, 2003). HACCP can be used throughout all stages of the food chain, from primary production to final consumption, forming an important part of risk-based food safety programmes.

HACCP is for use by all food businesses however, Small and/or Less-Developed Business (SLDBs) experience a number of constraints which can make HACCP implementation difficult. Government support through a HACCP strategy is especially important where SLDBs are concerned. Effective implementation of the strategy requires a number of support activities as well as the development of specific guidance for HACCP application.

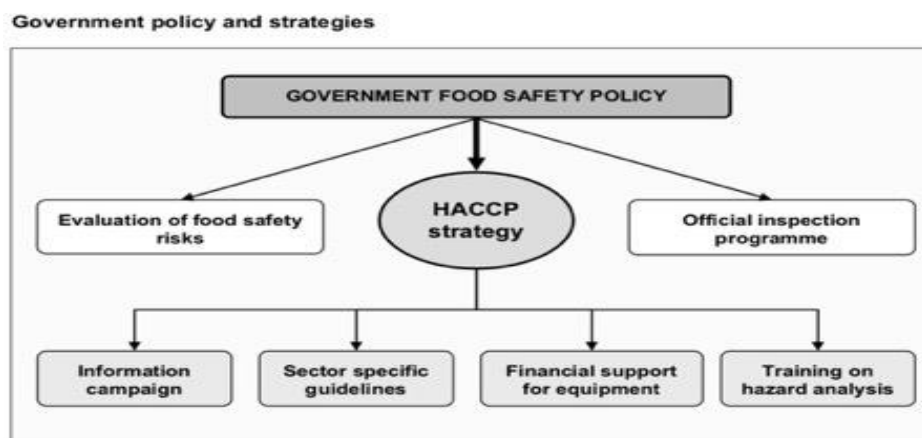


Figure 3 Generic Government policy and food safety strategies (source FAO Food and Nutrition Paper 86 figure 2.)

HACCP or HACCP-based systems may be implemented through voluntary programmes. In some cases, implementation can be in stages: starting with voluntary HACCP and progressing to mandatory HACCP. Voluntary and mandatory schemes can also be implemented in parallel, depending on various factors, including the food business sector and the importing country requirements. Certification systems for compliance with an agreed HACCP standard are implemented in many countries as part of voluntary or mandatory programmes. They can be linked to international schemes, such as British Retail Consortium (BRC) or the Safe Quality Food Standard. Certification requires sound standards to assess compliance including assessment of GHPs as well as HACCP. It also needs trained and qualified third party auditors. Certification may be required by international trade partners as proof of equivalence to regulatory HACCP requirements.

¹⁵ https://www.researchgate.net/publication/327327154_History_development_and_current_status_of_food_safety_systems_worldwide/figures?lo=1

Some key references identified on food safety include:

- [FAO Food and Nutrition Paper 76 2003 *Assuring Food Safety and Quality: Guidelines for Strengthening National Food Control Systems*](#) These Guidelines provide information for government agencies to assist in the development of national food control systems and to promote effective collaboration between all sectors involved in the management and control of food safety and quality
- [FAO/WHO guidance to governments on the application of HACCP in small and/or less-developed food business, FAO Food and Nutrition Paper 86 \(FNP 86\)](#) This document provides guidance to governments and relevant stakeholders and proposes the development of national HACCP strategies to include the implementation of HACCP systems in Small and/or Less-Developed Business (SLDB).
- [Food Quality and Safety Systems - A Training Manual on Food Hygiene and the Hazard Analysis and Critical Control Point \(HACCP\) System](#) (FAO 1998)
- [Regional framework for action on food safety in the Western Pacific. Manila: World Health Organization Regional Office for the Western Pacific; 2018. Licence: CC BY-NC-SA 3.0 IGO.](#)
- [Food-safety-certification-a-prerequisite-for-trade](#) PHAMA 2011

Table 1 Food Safety Assurance – Organisation and roles

	Leadership/Support	Regulation	Standards and benchmarking	Accreditation Bodies	Certification	Training Bodies
International Organisations						
	FAO/WHO INFOSAN	Codex	Food safety regulations			
	UNIDO, UNECE					
	IAF		✓			
	ISO		ISO 2200			
	Consumer Goods Forum		GSFI, SSCI			
	Food Industry Association ¹⁶		SQF Institute			
				FSSC 22000	✓	✓
				GlobalGAP, IFS etc	✓	✓
					SGS plus many	✓
Regional Organisations						
Australasia		FSANZ ¹⁷	FSANZ	JASANZ/IANZ		
Asia - ASEAN						
- China			GAQSIQ ¹⁸			
EU			EU Food Safety Authority ¹⁹			
USA			FDA ²⁰			

¹⁶ <https://www.fmi.org/about-us/about-us> - A USA Food Safety Initiative

¹⁷ FSANZ develops the standards in consultation with experts, other government agencies and stakeholders; the standards are enforced by state and territory departments, agencies and local councils in Australia, the Ministry for Primary Industries in New Zealand, and the Australian Department of Agriculture, Water and the Environment for food imported into Australia.

¹⁸ The General Administration of Quality Supervision, Inspection, and Quarantine (GAQSIQ) oversees food imports and exports and quarantines at the national and local levels. It manages and supervises the QS mark, which is meant to reassure product safety.

¹⁹ The European Food Safety Authority (EFSA) is the agency of the European Union (EU) that provides independent scientific advice and communicates on existing and emerging risks associated with the food chain.

²⁰ The United States Food and Drug Administration (FDA or USFDA) is a federal agency of the Department of Health and Human Services. The FDA is responsible for protecting and promoting public health through the control and supervision of food safety and other issues.

Food Safety- Management Leadership and Support Organisations

[United Nation's Food and Agriculture Organization \(FAO\)](#) and the [World Health Organization \(WHO\)](#). In 1963, the WHO and FAO published the [Codex Alimentarius](#). Codex develops international food standards, guidelines and codes of practice for an international food code that contributes to the safety, quality and fairness of food trade. Codex, which coordinates input from 188 member countries and the European Union, has a mandate to:

- protect the health of consumers;
- ensure fair international food trade; and
- develop standards based on sound scientific principles.

The Codex website provides details on the competent authorities for food safety as well as the laws, regulations and food safety activities for each member country.

[The International Food Safety Authorities Network \(INFOSAN\)](#) is a global voluntary network of national authorities with a role in food safety, coordinated by a joint FAO/WHO Secretariat. National authorities of almost all of FAO and WHO Member States are part of the network.

[United Nations Industrial Development Organisation \(UNIDO\)](#). This organisation works in standard setting and compliance.

[United Nations Economic Commission for Europe \(UNECE\)](#) was set up in 1947. It is one of five regional commissions of the United Nations. UNECE sets out norms, standards, and conventions to facilitate international cooperation within and outside the region.

[International Accreditation Forum \(IAF\)](#)

The IAF is the world association of Conformity Assessment Accreditation Bodies and other bodies interested in conformity assessment in the fields of management systems, products, services, personnel and other similar programmes of conformity assessment. Its primary function is to develop a single worldwide program of conformity assessment which reduces risk for business and its customers by assuring them that accredited certificates may be relied upon.

[Consumer Goods Forum \(CGF\)](#)

This international organisation brings consumer goods retailers and manufacturers together to collaborate to secure consumer trust and drive positive change, including greater efficiency and address issues such as including environmental and social sustainability, health, food safety and product data accuracy. Its member companies have combined sales of EUR 4.6 trillion and directly employ nearly 10 million people, with a further 90 million related jobs estimated along the value chain. Key initiative's include:

- [Global Food Safety Initiative \(GFSI\)](#) GFSI is a private organization working as a "Coalition of Action" bringing together retailers and brand owners (manufacturers) from across the CGF membership operating as multistakeholder governance with objective to create "an extended food safety community to oversee food safety standards for businesses and help provide access to safe food for people everywhere". GFSI's work in benchmarking and harmonization aims to foster mutual acceptance of GFSI-recognized certification programmes across the industry with the ambition to enable a "once certified, accepted everywhere" approach. Certification according to a GFSI-recognized certification programme can be achieved through a successful third party audit. [Certification programmes recognized by GFSI](#) include those operated by; *Brand Reputation through Compliance (BRC)*²¹, *Freshcare*; FSSC 22000 ;

²¹ This is a globally recognised UK trade organisation. Which established a series standard to help companies comply with food safety legislation, and to provide guidelines for the manufacture of safe, quality food products.

GLOBALG.A.P; International Featured Standards IFS; Japan Food Safety Management Association ; SQF Safe Quality

- [Sustainable Supply Chain Initiative \(SSCI\)](#) The mission of SSCI is to provide clear guidance in the consumer goods industry to buyers and suppliers on which third-party auditing, monitoring and certification schemes that cover key sustainability requirements and apply relevant governance and verification. The initiative currently focuses on benchmarking social compliance programmes under three sectoral scopes and will later expand its benchmark to environmental compliance programmes as well. The Primary Production scope was developed through an ongoing collaboration with IDH, the Sustainable Trade Initiative.

Standard Setting Organisations

[International Standards Organisation \(ISO\)](#). ISO is an independent, non-governmental international organization with a membership of 167 national standards bodies. It brings together experts to share knowledge and develop voluntary, consensus-based, market relevant International Standards.. Some key ISO Standards include:

- Food Safety – [ISO 22000:2018](#) Food Safety Management Systems. This sets out the requirements for a food safety management system and can be certified to it. It maps out what an organization needs to do to demonstrate its ability to control food safety hazards in order to ensure that food is safe. It can be used by any organization regardless of its size or position in the food chain. The seven HACCP principles are included in ISO 22000.
- Conformity assessment – ISO 17000
 - 17021 Conformity assessment — Requirements for bodies providing audit and certification of management systems
 - 17065 Conformity assessment — Requirements for bodies certifying products, processes, and services
- Quality management systems – [ISO 9000 family](#) -
- Environmental management – [ISO 14000](#)

Pacific ISO members include:

- Fiji - [Department of National Trade Measurement and Standards](#) (member body)
- Vanuatu– Vanuatu Bureau of Standards (Corresponding Member)
- Papua New Guinea. - [National Institute of Standards and Industrial Technology of Papua New Guinea](#) (NISIT) (Corresponding Member)

2.2.2 Sustainability certification programmes organisations

As with Food Safety certification programmes there are a large number of organisations that support sustainability assurance. Table 2 provides a summary of some of the main organisations.

Table 2 Sustainability assurance organisation and roles

	Leadership/Support	Regulation	Standards and benchmarking	Accreditation Bodies	Certification	Training Bodies
International						
	UNSDG					
	FAO	Codex	Organic Norms			
	UN ITC – Standards Map		✓			✓
	ISEAL		✓			
	IFOAM	✓	✓			✓
	Consumer Goods Forum		SSCI			
	World Wildlife Fund					
	Fair Trade		✓	✓		
	The Sustainability Consortium		✓			✓
	GRI		✓			
				IOAS ²² etc		✓
			SAI Global and many others			✓
Regional	Various					
Oceania				JAZANZ/IANZ	Various	Various

²² <https://ioas.org> IOAS is a non-profit organisation dedicated to the integrity of ecolabel claims in the field of organic and sustainable agriculture, environmental management, social justice and fair trade

International Leadership and Support

[United Sustainable Development Goals \(SDG\)](#)

The UN Sustainable Development Goals (SDGs) are 17 goals to end poverty, protect the planet, and ensure prosperity for all. The SDGs provide a shared vision of the future, and a framework to guide governments, industry, non-profit organisations and the entire global community in working together for a better world. They have been established as a point of reference for many sustainable assurance programmes. One area of action is through the [Partnership Platform](#) - a global registry of voluntary commitments and multi-stakeholder partnerships made by stakeholders in support of the implementation of the SDGs,

[United Nations International Trade Centre \(UNITC\)](#)

The ITC is a multilateral agency which has a joint mandate with the WTO) and UNCTAD. It has a number of resources to support the adoption of sustainability standards including:

- [ITC Standards Map](#)
- Business, trade and market intelligence: [Trade for Sustainable Development \(T4SD\) database](#).
- SME Training academy²³- this has courses on export development; sustainability; trade support; entrepreneurship; E commerce; market analysis
- [Training resources](#)- has 5 eLearning courses to provide information on VSS, certification and the costs and benefits associated with certification

[United Nations Council on Trade And Development \(UNCTAD\)](#)

UNCTAD supports the use of Voluntary Sustainability Standards (VSS) in developing countries because it recognises that they can improve access to more profitable markets. UNCTAD has facilitated a program to address the problems caused by the many sustainability certification initiatives - the [State of Sustainability Initiatives](#) (SSI) project linked with the International Institute for Sustainable Development (IISD) under the auspices of the Sustainable Commodity Initiative (SCI). This has undertaken a number of reviews of reviews into VSS including reviews on coffee, cocoa and seafood²⁴. It has also developed resources to support the analysis of VSS including the VSS assessment toolkit²⁵.

[ISEAL Alliance](#)

The ISEAL Alliance is a recognised authority on good practice for sustainability standards and its Codes of Good Practice represent the most widely recognised guidance on how standards should be set up and implemented in order to be effective. By complying with these Codes and working with other certification initiatives, ISEAL members demonstrate their credibility and work towards improving their positive impacts.

[IFOAM](#)

IFOAM stands for International Federation of Organic Agriculture Movements and is the leading global umbrella organization for the organic farming movement. The IFOAM Basic Standards provide a framework of minimum requirements, including the omission of agrochemicals such as pesticides and chemical-synthetic fertilizers. It is active in supporting organic agriculture through training, [certification](#) and advocacy.

[Fair Trade](#)

Fair trade certification is a product certification within the market-based movement fair trade. The most widely used fair trade certification is FLO International's, the International Fairtrade Certification

²⁴ <https://www.iisd.org/ssi/market-coverage/>

²⁵ <https://vssapproach.unctad.org/toolkit/>

Mark, used in Europe, Africa, Asia, Australia, and New Zealand. The Fairtrade International certification system covers a wide range of products, including banana, coffee, cocoa, cotton, cane sugar, flowers and plants, honey, dried fruit, fruit juices, herbs, spices, tea, nuts, and vegetables

[World Wildlife Fund](#) (WWF)

The World Wildlife Fund was established 60 years ago and is one of the world's leading conservation organizations working in nearly 100 countries. It helped establish a range of sustainability programmes including the Forest Stewardship Council (FSC) and Marine Stewardship Council (MSC) sustainability programmes. It continues to support a range of [food initiatives](#).

[Global Reporting Initiative](#) (GRI) - is a tool used globally by organisations and companies to report on their sustainability performance. GRI is a non-profit organisation promoting economic, environmental and social sustainability. GRI works towards a sustainable global economy which should combine long term profitability with social justice and environmental care.

[The Sustainability Consortium](#) (TSC) - this is a global non-profit organization working with a diverse range of stakeholders to work collaboratively to build science-based decision tools and solutions that address sustainability issues that are materially important throughout a product's supply chain and lifecycle. [In 2021 it reported](#) that claims that over 1,700 manufacturers representing almost \$1 trillion of consumer products annual sales used one its tools that performs an assessment of their product and supply chain sustainability.

Regional agencies

[Pacific Community \(SPC\)](#)

SPC is the principal scientific and technical organisation in the Pacific region, supporting development since 1947. It is an international development organisation owned and governed by our 26 country and territory members with the Mission *We work for the well-being of Pacific people through the effective and innovative application of science and knowledge, guided by a deep understanding of Pacific Island contexts and cultures*. SPC have extensive experience and capabilities in a number of its divisions that are relevant to supporting market certification programmes.

- [Land Resources Division](#) (LRD) LRD's core business is to improve the food and nutritional security of the Pacific Community through the sustainable management and development of land, agriculture, and forestry resources. This is accomplished through the delivery of technical support, training, and advice to our member country governments in the areas of plant protection, conservation and use of plant genetic resources, animal health and production, agroforestry, sustainable systems for agriculture, forestry and land management, and biosecurity and trade facilitation.

[Secretariat of the Pacific Regional Environment Programme](#) (SPREP)

SPREP is the regional organisation established by the Governments and Administrations of the Pacific charged with protecting and managing the environment and natural resources of the Pacific.

[Pacific Organic and Ethical Trade Community-](#) (POETCom)

POETCom is a not-for-profit membership organisation seeking to *“grow the organic and ethical trade movement and contribute to productive, resilient, sustainable and healthy Pacific Islands region through coordination, information sharing, networking, capacity building and establishing a regional*

certification scheme” to support market access and trade²⁶. It has members throughout the Pacific Island region with the secretariat hosted by the SPC LRD in Suva, Fiji. POETCom members work to develop the tools, education, and support to make organic agricultural practices and produce an attractive and rewarding alternative to conventional techniques for farmers and consumers. The community conducts training and distributes materials to aid the use of organic technologies and climate resilient planting material, help farmers to apply the Pacific Organic Standards and facilitates the exchange of ideas, produce and processes between POETCom individuals, groups, and nations.

[Pacific Farmers Organisation Network-\(PIFON\)](#)

PIFON is the regional umbrella organisation for national farmer organisations operating since 2008. It provides support and services to its members in nine Pacific countries, including in many of the SAFE project countries. The network combines over 20 farmer organisations and reaches up to 79,000 individual farmers. The network provides technical support as well as evaluation and monitoring services, organises farmer-to-farmer exchanges, facilitates research, workshops, and business skill trainings, and conducts value chain analysis.

[Pacific Trade Invest](#)

Pacific Trade Invest is a global network with offices in Australia, China, Europe, and New Zealand. It is the Pacific region’s lead trade and investment promotion agency. The global network supports and delivers to the Pacific Island Forum Secretariat’s Strategic Outcome C – Increasing Economic Prosperity. It has a number of resources that support the SAFE project objectives

- [Export Dynamics in the Pacific Islands](#) this document is prepared every two years and provides a detailed analysis within the Pacific region including perceptions on barriers to export (e.g. finance, transport and fuel costs, capacity and labour constraints), assistance needed to increase exports (e.g. more competitive transport, introductions to customers, marketing, grants and trade finance) and awareness of trade agreements.
- [Path to market webinar series](#) (2021). This included sessions in HACCAP certification and import regulations.

[Pacific Islands Private Sector Organization \(PIPSO\)](#)

This is a private sector representative body in the Pacific Islands region set-up through a mandate of the Forum Economic Ministers in 2005 to be the representative body of the Pacific region’s private sector and to ensure dialogue between public and private sectors for strengthening regional policy making. PIPSO represents 20 National Private Sector Organisations such as the Chamber of Commerce in the Pacific region (including the SAFE project countries part from Timor Leste). It has facilitated the development of [training manuals](#) and other resources including ones related to food safety which includes information on standards and certification options.

2.2.3 SAFE country relevant organisations

Links to information that provides insights on the national organisations for each of the SAFE project countries is provided below. Links to each countries FAOLEX reference are also provided. FAOLEX is a database of national legislation, policies and bilateral agreements on food, agriculture, and natural resources management operated by the FAO. Additional information on national agriculture policies and strategies can also be found at the [Pacific Agriculture Policy Project](#).

Table 3 Key Government and NGO contacts

	Government Agencies	NGO Agencies	Key References
Cook Islands	Ministry of Agriculture		
	Cook Islands Codex details		
	FAOLEX Cook Islands		
Federated States of Micronesia	FAOLEX FSM details		
	FSM Codex details		
Fiji	FAOLEX Fiji		
	Ministry of Agriculture	Fiji Market Access Working Group	PHAMA Plus country overview 2021 ²⁷
	Ministry of Health & Medical Services	Fiji Kava Taskforce	Food Safety Regulations 2009 ²⁸
	Fiji Codex details		
Kiribati	FAOLEX Kiribati		
	Kiribati Codex details		
Marshall Islands	FAOLEX Marshall Islands		
Nauru	FAOLEX Nauru		
	Nauru Codex details		
Niue	FAOLEX Niue		
	Niue Department of Agriculture		
Papua New Guinea	FAOLEX PNG		
	National Agriculture Quarantine and Inspection Authority	Industry Working Groups for Cocoa; Coffee; Coconut	PHAMA Plus country overview 2021 ²⁹
	PNG Codex details	Coffee Industry Corporation	
		Cocoa Board or PNG	
		PNG Women in Coffee Assn	
Samoa	FAOLEX Samoa		
	Ministry of Agriculture and Fisheries (MAF)		PHAMA Plus country overview 2021 ³⁰
	Samoa Market Access Working Group (MAWG)		
	Samoa Codex details		
Solomon Islands	FAOLEX Solomon Islands		
	Ministry of Agriculture and Livestock	Solomon Islands Chamber of Commerce and Industry	PHAMA Plus country overview 2021 ³¹
	Commodities Export Marketing Authority	Cocoa Industry Working Group	
	Solomon Islands Codex details	Coconut Industry Working Group	
		Kastom Garden Association	
Timor Leste	FAOLEX Timor Leste		
	Ministry of Ag and Fisheries		
	Timor Leste Codex details		
Tonga	FAOLEX Tonga		
	Ministry of Agriculture and Food, Forests and Fisheries (MAFFF)		PHAMA Plus country overview 2021 ³²
	Tonga Market Access Working Group		
	Ministry of Trade and Economic Development (MTED)		
	Tonga Codex details		
Tuvalu	FAOLEX Tuvalu		
Vanuatu	FAOLEX Vanuatu		

²⁷ https://phamaplus.com.au/wp-content/uploads/2021/12/Fiji_Factsheet_Final2.pdf

²⁸ https://www.health.gov.fj/wp-content/uploads/2014/09/33_The-Food-Safety-Regulations-2009.pdf

²⁹ https://phamaplus.com.au/wp-content/uploads/2021/12/PNG_Factsheet_Final2-1.pdf

³⁰ https://phamaplus.com.au/wp-content/uploads/2021/12/Samoa_Factsheet_Final2-1.pdf

³¹ https://phamaplus.com.au/wp-content/uploads/2021/12/Solomon_Islands_Factsheet_Final2.pdf

³² https://phamaplus.com.au/wp-content/uploads/2021/12/Tonga_Factsheet_Final2-1.pdf

	Department of Agriculture and Rural Development Vanuatu	Vanuatu Kava Industry Association	PHAMA Plus country overview 2021 ³³
	Vanuatu Bureau of Standards	Vanuatu Cocoa Industry Association	
	Vanuatu Primary Producers Authority		
	Vanuatu Codex site		

2.2.4 Pacific market certification projects

There have been a wide range of value chain and other projects that have supported access to market certification programmes to enhance access to international higher value markets. Some key projects and initiatives are outlined below.

[Pacific Horticultural and Agricultural Market Access'](#) (PHAMA Plus) Program

PHAMA Plus provides assistance to help Pacific island countries manage regulatory aspects associated with exporting primary and value-added products. This encompasses gaining access for products into new markets, and helping to manage issues associated with maintaining and improving existing trade. Core countries assisted through PHAMA Plus are Fiji, Papua New Guinea, Samoa, Solomon Islands, Tonga, and Vanuatu³⁴. Some of its activity that could be relevant to the SAFE project include.

- Hazard Analysis Critical Control Point (HACCP) accreditation for businesses and HACCP Train-the-Trainer course to build industry and government capacity.
- Development of quality production and processing manuals;
- Export feasibility for selected products to new destinations;
- Development of quality systems to support kava exports which included a National Quality Standard for kava export; facilitation of a regional standard for kava and a kava quality manual which explains key production and processing methods.
- Capacity building of public and private sector to gain, maintain and improve international market access.

11th European Development Fund (EDF) programmes³⁵ 2014-2020.

The EDF programme involved projects in many Pacific countries. For example the *Vanuatu Value Chain programme³⁶* supported the development of three strategic value chains (coconuts, beef, fruits & vegetables). The project identified and evaluated different market certification programmes for these commodities.

2013- 2016 10th EDF programmes. Projects included:

- *Increasing Agricultural Commodity Trade (IACT)³⁷ (2012- 2016)* This project was implemented by the Land Resources Division of SPC. It was conducted in 15 Pacific African Caribbean Pacific (ACP) group of countries over four years. IACT was one of the four components of SPEITT (*Strengthening Pacific Economic Integration Through Trade*) project, which targeted private sector development and trade by strengthening institutional capacity and linkages in the agriculture, forestry, aquaculture, and livestock sectors. The project's key result areas included developing value-added products for export, strengthening export market access and market penetration, and compliance of these products and facilities with international trade standards.
- *[Pacific Agriculture Policy Project](#) (PAPP) (2013-2016)* The PAPP operated in the Pacific ACPs (including Fiji, Samoa, Tonga and Vanuatu) and Timor Leste. It was implemented by LRD of

³³ https://phamaplus.com.au/wp-content/uploads/2021/12/Vanuatu_Factsheet_Final2.pdf

³⁴ https://phamaplus.com.au/wp-content/uploads/2021/12/Vanuatu_Factsheet_Final2.pdf

³⁵ https://www.sprep.org/attachments/pirt/PIRT_presentation_-_11th_EDF_National_Regional_thematic_programmes_-_Jesus_Lavinia.pdf

³⁶ https://international-partnerships.ec.europa.eu/system/files/2019-09/nip-edf11-vanuatu-2014-2020_en.pdf

³⁷ Anon. 2016. Increasing Agricultural Commodity Trade (IACT) : terminal report 2016. Suva, Fiji: Pacific Community. 198 pages. <https://purl.org/spc/digilib/doc/43xqr>

SPC. The project assisted the Ministries of Agriculture and Forestry of Pacific ACO governments to develop effective national evidence-based agriculture sector policies and interventions to ensure competitiveness of smallholder farmers' participation in agriculture-based development. PAPP worked with farmer associations in partnership with national extension and research services to assist in the adoption of new farming methods to improve their agricultural productivity and increase their resilience against the effects of climate change.

Facilitating Agriculture Commodity Trade project (FACT) (2009 to 2012)

This project operated prior to the IACT project in nine countries with a budget of over EUR 4 million. It also targeted support to the private sector development of value chains.

[Pacific Aid-for-Trade Strategy \(PAfTS\) \(2020 – 2025\)](#) ³⁸

This was developed by the Pacific Islands Forum Secretariat and development partners to identifying and implementing core trade priorities for the Pacific region. The PAfTS 2020-2025 is guided by four principles: strategic regional impact; prioritization; leveraging existing policies and mechanisms; and ownership. In line with these guiding principles, the Strategy focuses on mobilising Aid for Trade resources for projects in the four thematic priority areas of services; electronic commerce; comprehensive connectivity and deepening Forum markets.

[Pacific Community Climate Smart Agriculture Alliance \(SPC CSA Alliance\)](#)

The Pacific Community established a regional multi-stakeholder Climate Smart Agriculture (CSA) network for knowledge exchange and sharing information, experiences, and technical skills in climate smart agriculture. The alliance is supported by FAO sub-regional programme for CSA. The SPC CSA network promotes the use of CSA as a means to adapt to climate change and enhance the resilience of the food production systems in the Pacific.

[All ACP Agricultural Commodities Programme \(AAACP\)](#), 2008 – 2011. This project was funded by the European Union. AAACP aimed to improve the incomes and livelihoods of agricultural producers, and to reduce income vulnerability at the producer and macroeconomic levels. One of its outputs *Certification - opportunities and challenges for Pacific producers* Anon. 2011³⁹ provides a useful introduction to market certification programmes in the Pacific and explores the opportunities and issues associated with these.

[Samoa Agriculture Competitiveness Enhancement Project](#), (World Bank P115351) (2012-2017). This US\$12m project had the objective to support fruit and vegetable growers and livestock producers to improve their productivity and take greater advantage of market opportunities. Component 2 included action to improve organic certification as well as to provide technical advice for developing export markets. It identified the barriers of strict phytosanitary standards for access into the NZ and Australia markets which is a significant barrier to exports. The project however focused mainly on domestic consumption and import substitution.

[PNG Agriculture Commercialization and Diversification Project](#) World Bank 2022- This project seems to be in the process of being setup.

³⁸ <https://www.forumsec.org/wp-content/uploads/2020/04/Pacific-Aid-for-Trade-Strategy-2020-2025.pdf>

³⁹ Certification - opportunities and challenges for Pacific producers. In AAACP Pacific brief - no.3, September 2011. Suva, Fiji: Secretariat of the Pacific Community. 4 p. <https://pur1.org/spc/digilib/doc/hqskb>

[IFAD project Fiji 2015](#) - enhancing smallholder farmers' ability to produce and market high-value crops, including through organic certification

[IFAD project Samoa 2018](#) - the Integrated POETcom/SPC) project which developed a participatory guarantee mechanism to expand the rollout of organic certification.

4.0 Analysis.

There are a wide range of possible market certification programmes that could be of value to support the sale of pacific products into high value markets. Options are reviewed below with segmentation based on:

- By market certification type (4.1.)
- By product type (4.2)

4.1 Analysis of programmes by market certification type

4.1.1 Food safety programmes

Background

Background information on food safety programmes is provided in section 2. There are a range of approaches to obtaining food safety certification. HACCP certification is a simple and basic level. To become certified applicants need to successfully pass a third-party certification audit provided by a qualified food safety auditor.

Pacific analysis

Current situation

There are many pacific business and individuals with food safety certification. This has been supported through many projects. Some of the main food safety schemes include:

1. [Brand Reputation Compliance Product Certification](#) Schemes (BRC)
2. [Food Safety Management Systems Scheme](#)
3. [Food Safety System Certification 22000](#) (FSSC 2200)
5. [SAFE Quality Food \(SQF\)](#)

Table 4 provides a list of JAS-ANZ approved certification bodies providing food safety certification in Pacific countries. It is anticipated that there will be other certification bodies active in the region and these could be identified through the survey or discussions with food safety experts in the region. It is noted that many countries in the SAFE project do not have certification bodies active in their country.

Strengths for inclusion in the SAFE project

- Food safety certification is a precondition for access into most high value markets
- There are food safety training and certification programmes established in some of the SAFE countries
- Other parts of the SAFE programme is developing the regulatory foods safety capacity.

Weaknesses for inclusion in the SAFE project

- Food safety does not necessarily result in price premiums

Projects and reports

- [Phama plus - Hazard Analysis Critical Control Point \(HACCP\) accreditation for businesses and HACCP Train-the-Trainer course to build industry and government capacity.](#)
- [Baines, R.N. and Soon, J.M. \(2013\). PRIVATE FOOD SAFETY AND QUALITY STANDARDS: FACILITATING OR FRUSTRATING FRESH PRODUCE GROWERS?](#) Acta Hortic. 1006, 85-92
- PHAMA [Case study – HACCP: maintaining trade through remote audit and certification](#) 2021

Table 4 JAS-ANZ approved food safety certification bodies

Certifier	Country														
	Cook Islands	FSM	Fiji	Kiribati	Marshall Islands	Nauru	Niue	Palau	PNG	Samoa	Solomon Islands	Timor Leste	Tonga	Tuvalu	Vanuatu
AsureQuality	Yes		Yes												Yes
Aus-Qual Pty										Yes					
BSI Group			Yes						Yes	Yes	Yes				Yes
SAI Global Cert Services			Yes						Yes			Yes			Yes
Integrated Quality Cert			Yes												
Telarc	Yes		Yes							Yes			Yes		Yes
SGS Australia									Yes				Yes		
Merieux NutriSciences Certification LLC			Yes												
TQCS International Pty Ltd,			Yes									Yes	Yes		
PWC compliance									Yes						
HACCP Australia (Fiji) Limited (not JAZANZ)			Yes						Yes						

Source – Obtained from the JAS-ANZ website <https://www.jas-anz.org>

4.1.2 Organic certification

Background

Organic certification has the largest variety of agricultural products and, by far, the largest certified area of profiled sustainability certification programmes (Willer et al., 2021). A total of 72.1 million hectares were organic certified in 2019, representing 1.5% of all agricultural land worldwide. The global organic market was worth US\$125.7 billion in 2019 and the leading countries were the United States (42%), Germany (11%) and France (11%).

The scope and impact of organic certification in relation to SDG's is provided in Table 5.

Table 5 Evaluation of Organic Standards against SDG1s

VSS name	SDG 1	SDG 2	SDG 3	SDG 4	SDG 5	SDG 6	SDG 7	SDG 8	SDG 9	SDG 10	SDG 11	SDG 12	SDG 13	SDG 14	SDG 15	SDG 16
International Federation of Organic Agriculture Movements (IFOAM Standard)	36%	36%	40%	30%	5%	55%	26%	33%	14%	22%	28%	31%	0%	72%	44%	4%
Pacific Organic Standard - Crops	20%	20%	29%	20%	21%	33%	13%	23%	14%	11%	11%	12%	11%	0%	15%	4%
Pacific Organic Standard - Livestock	20%	20%	29%	20%	21%	35%	13%	25%	14%	11%	11%	14%	11%	13%	14%	4%
Pacific Organic Standard - Aquaculture	20%	19%	29%	20%	21%	35%	13%	24%	14%	11%	11%	12%	11%	22%	17%	4%

Source Bissinger, K et al 2020

Pacific analysis

Organic certification has operated throughout the Pacific covering a wide range of products as illustrated in Table 6 for many years.

Table 6 Pacific organic products by country

Products	Countries
Vanilla, turmeric, ginger & other spices	Fiji, Vanuatu, Niue, Samoa
Cocoa	Vanuatu, Samoa, PNG
Virgin Coconut Oil	Samoa, Fiji, Solomon Islands, Tonga, Vanuatu
Coconut meal	Vanuatu
Nonu /noni (<i>Morinda Citrifolia</i>)	Cook Islands, Samoa, Fiji, Niue, French Polynesia
Honey	Niue, Fiji
Bananas (including processed)	PNG, Samoa
Coffee	PNG, Samoa, Vanuatu
Livestock(Beef, Goats and Sheep)	Vanuatu, Fiji
Fruit & Vegetables (including processed)	Fiji, New Caledonia, Samoa, French Polynesia, Cook Islands, Republic of the Marshall Islands
Rum	French Polynesia
Forest nuts	Solomon Islands

Source⁴⁰ Willer, Helga et al

Table 7 Oceania organic agricultural land, organic share of total agriculture and number of producers

⁴⁰ Willer, Helga, Jan Trávníček, Claudia Meier and Bernhard Schlatter (Eds.) (2021): *The World of Organic Agriculture. Statistics and Emerging Trends 2021*. Research Institute of Organic Agriculture FiBL, Frick, and IFOAM – Organics International, Bonn (v20210301) <https://www.fibl.org/fileadmin/documents/shop/1150-organic-world-2021.pdf>

Country	Area [ha]	Share of total agri. land [%]	Producer [no.]
Australia	35'687'799	9.9%	1'829
Cook Islands	15	1.0%	58
Fiji	19'303	4.5%	204
French Polynesia	1'562	3.4%	22
New Caledonia	800	0.4%	
New Zealand	79'347	0.8%	685
Niue	43	0.9%	
Papua New Guinea	72'477	6.1%	10'159
Samoa	40'992	14.5%	1'919
Solomon Islands	3'367	2.9%	898
Tonga	1'119	3.2%	81
Vanuatu	2'052	1.1%	75
Total	35'908'876	9.7%	15'930

Source *Willer, Helga et al*

Table 8 provides details on the certified organic area as well as a share of the total agricultural area in Pacific countries – this information was originally collected by POETCom and reported in the *World of Organic Agriculture*. Table 8 provides details of organic certification bodies that are recognised by the EU. It is probable that there are other organic certification bodies active in the Pacific however this does provide an insight of some of the key certification bodies.

Table 8 EU Organic recognised certifiers by SAFE countries

Certifier	Cook Islands	FSM	Fiji	Kiribati	Marshal Islands	Nauru	Niue	Palau	PNG	Samoa	Solomon Islands	Timor Leste	Tonga	Tuvalu	Vanuatu
A Cert									✓						
Agreco			✓						✓	✓	✓		✓		
Australian Certified Organic	✓		✓						✓				✓		✓
Bioagricert			✓												
BioGro NZ			✓				✓			✓					✓
CERES									✓	✓		✓			
Control Union	✓		✓						✓	✓	✓	✓	✓	✓	✓
Ecocert			✓							✓		✓			✓
IMO									✓						
Kiwa BCS			✓						✓						
NASAA		✓	✓	✓	✓	✓		✓	✓	✓	✓	✓	✓	✓	✓
OneCert										✓					
Soil Assn										✓					
Southern Cross			✓							✓			✓		✓

Source EU Organic Farming Information System LIST OF RECOGNISED CONTROL BODIES AND CONTROL AUTHORITIES FOR THE PURPOSE OF EQUIVALENCE⁴¹

⁴¹ https://ec.europa.eu/agriculture/ofis_public/pdf/CBListAnnexIV.pdf Report generation date : 26/01/2022.

Strengths for inclusion in the SAFE project

- Almost all types of agricultural products are certified. In addition to the agricultural land, there are wild collection, aquaculture, and forestry products, and in 2019 these sectors accounted for 35.1 million hectares.
- Organic production and certification systems are well established in most of the SAFE countries.

Weaknesses for inclusion in the SAFE project

- None identified.

References and reports

The following documents report on various organic projects and resources in the Pacific.

- [Organic certification for coconut plantations in the Pacific Region : management guidelines on how to establish grower groups and its Internal Control Systems \(ICS\)](#) Möller C. 2018 SPC.
- *Organic internal control standard for Sei pepper farmat Pohnpei, FSM* Namoumou, S. 2010 Suva, Fiji: Secretariat of the Pacific Community.
- [Pacific organic standard](#) Anon. 2008. Noumea, New Caledonia: SPC

4.1.3 Fair Trade

Background

Founded in 1997, Fairtrade International is a non-profit, multi-stakeholder association of 22 member organisations – three producer networks and 19 national Fairtrade organisations, including Fairtrade Australia and New Zealand.

The global Fairtrade International network ensures an equal share of trade benefits for farmers and workers in 75 countries through standards and certification, focused programmes and advocacy. Standards encompass social, economic and environmental requirements for smallholder farmers, plantations using hired labour, and traders, and guarantee a minimum price and premium on most goods for producers. More than 2.8 million hectares were Fairtrade-certified in 2019, representing 0.06% of global agricultural land. Fairtrade International certifies a wide range of commodities, from tropical fruit to cereals and textiles.

Cocoa accounted for almost half of Fairtrade International’s total area at over 1.3 million hectares – 11.2% of the global cocoa area. Coffee was the second most important product at more than 1 million hectares, representing 9% of the global coffee area. Fairtrade International certified over 1.7 million farmers and 174,000 agricultural employees in 2019. Most farmers were certified in Africa and the Middle East (71%), followed by Asia (18%) and Latin America (11%). The Fairtrade-certified area has expanded by 14% since 2015 and grew by 6% in 2018-19.

[FLOCERT](#) – a Germany-based, ISO 17065 accredited social enterprise – is the independent certifier for Fairtrade. The scope and impact of Fairtrade certification in relation to SDG’s is provided in Table 9.

Table 9 Comparison of some Fair-trade standards against the UN SDG’s

VSS name	SDG 1	SDG 2	SDG 3	SDG 4	SDG 5	SDG 6	SDG 7	SDG 8	SDG 9	SDG 10	SDG 11	SDG 12	SDG 13	SDG 14	SDG 15	SDG 16
----------	-------	-------	-------	-------	-------	-------	-------	-------	-------	--------	--------	--------	--------	--------	--------	--------

Fairtrade International - Small Producers Organizations	64%	28%	44%	46%	73%	53%	20%	50%	14%	55%	31%	36%	44%	9%	50%	20%
Fairtrade International - Gold Standard	72%	4%	22%	36%	63%	24%	0%	39%	0%	77%	22%	14%	5%	0%	6%	36%

Pacific analysis

Current production

The [2020 Fairtrade Australia New Zealand Annual report](#) provided the following information on Fairtrade in the Pacific

- 21,313 Fairtrade households
- 113,002 Fairtrade beneficiaries
- A\$1.97m received in Fairtrade premiums by Pacific Organisations in 2019
- A\$37.8m in Fairtrade sales from the Pacific in 2019

Planned production

E | PACIFIC
Australia, Fiji, New Zealand, Papua New Guinea, Samoa, Tonga + Additional by 2030

METRIC	2015	2030
Producer Organisations	10	38 – 48
Farmers & Workers	21,680	69,700 – 87,125
Producer Volume, MT	45,716	101,000 – 126,250
Sales Value, €	18.8M	59.4M – 74.25M
Fairtrade Premium, €	4.0M	10.0M – 12.5M
Fairtrade Product Sales, €	218M	940M – 1.55B

Figure 4 2030 Fairtrade projections by UN subregion (2017)

Key commodities for Fairtrade development (2016)⁴²

- Coffee Stage 1 PNG, Solomon Islands, Timor Leste; Stage 2 Vanuatu
- Coconut oil (Copra) Stage 2 Fiji
- Bananas Stage 2 Samoa
- Ginger Stage 1 Fiji
- Cocoa Stage 1 PNG, Samoa
- Vanilla Stage 1 PNG, Tonga
- Sugar Stage 1 Fiji
- Coconuts (Des/fresh/shell) Stage 1 Fiji, PNG, Samoa

Strengths for inclusion in the SAFE project

- Well established Fair trade certification systems in PNG, Samoa and Tonga with plans for development in other SAFE countries.
- Fair trade coffee and cocoa is well recognised.

Weaknesses for inclusion in the SAFE project

- There has been some loss in market share to other market certification programmes.

Projects and reports

- [Scaling Up Fairtrade Impact in the Pacific \(current\)](#) funded through the Australian Department of Foreign Affairs and Trade funding, activities are carried out in Fiji; Samoa; Solomon Islands;

⁴² From 'Increasing Sustainable and Ethical Supply Chains in the Indo-Pacific' Research conducted by Swinburne University in 2016. Presented on page 5 *Transforming Trade, Transforming Lives | An Investment Opportunity in SE Asia & The Pacific*
https://cdn.fairtradeanz.org/app/uploads/2020/06/27175125/Transforming_Trade_Transforming_Lives_.pdf

Timor Leste and Tonga. Activities aim to increase investment in small-scale producers and enhance trading conditions, including fairer prices. Work is also done to build strong democratic organisations which include a focus on child protection and gender equality. The project, now on phase two.

- [Fair trade in the Pacific a story from Timor-Leste \(2022\)](#)
- [Increasing access to markets for Fairtrade supply chain in Papua New Guinea \(2013 -2016\)](#) funding support from Zealand Ministry of Foreign Affairs and Trade focused on increasing access to market for Fairtrade coffee and cocoa supply chains from Papua New Guinea. In Papua New Guinea Fairtrade works with small-hold coffee and cocoa farmers because it is these small farms that support rural communities and produce over 80% of the coffee and cocoa grown in Papua New Guinea
- Fairtrade certification of sugar cane in Vanua Levu, Fiji: an economic assessment (2013) Bower, Jonathan. 2013.⁴³
- [Fairtrade in Samoa 2020](#) - Krissy Co Ltd, Savai'i Coconut Farmers Association
- *Fairtrade certification of sugar cane in Vanua Levu, Fiji: an economic assessment 2013*⁴⁴

4.1.4 GLOBALG.A.P

Background

The Global Partnership for Good Agricultural Practices (GlobalGAP) is a private initiative in the food and agriculture sector with over 500 members in 136 countries. Originally founded in 1997 by the Euro-Retailer Produce Working Group, it represents the GLOBALG.A.P. Certificate, also known as the Integrated Farm Assurance Standard (IFA), focusing on good practice across crops, livestock and aquaculture production. It covers food safety, environmental aspects, and worker health and safety, and is based on an equal partnership between producers and buyers of raw agricultural food products.

It has undertaken research into making GLOBALGAP programmes [accessible for small farmers](#) and has made some changes to its services to enhance access to small farmers. The GLOBALG.A.P. Option 2 certification – (producer group certification) allows for a group of producers with a shared mandatory Quality Management System (QMS) receives one certificate for the entire group following a successful audit of the QMS and random sample inspections of some of the producers by a GLOBALG.A.P. approved certification body. They have also established the [localg.a.p. programme](#) to be used as a capacity-building tool, or to be applied as a local standard for agricultural supply chains especially in developing economies and emerging markets. It is intended to help producers adopt good agricultural practices that can improve the efficiency of farm management, cut exposure to food safety risks, and comply with legislation on food safety.

In 2019, over 4 million hectares were certified against the GLOBALG.A.P. standard (This figure includes crop producers only, and excludes livestock and aquaculture operators.) Europe has the largest percentage of certified land (43%), followed by Latin America (24%), Africa (12%), and North America (11%). GLOBALG.A.P.'s certified area has increased by 31% since 2015, and by 6% in 2018-19. Currently, fruit and vegetable products are certified with the IFA standard worldwide.

The scope and impact of GLOBALGAP certification in relation to SDG's is provided in Table 10.

⁴³ Bower, Jonathan. 2013. Fairtrade certification of sugar cane in Vanua Levu, Fiji: an economic assessment. Suva, Fiji: Secretariat of the Pacific Community. 64 p. <https://purl.org/spc/digilib/doc/ev6z2>

⁴⁴ https://spccfstore1.blob.core.windows.net/digitalibrary-docs/files/ce/ce1acb81c477d8412834af9537de738b.pdf?sv=2015-12-11&sr=b&sig=OmBo4QbaeTi1VieGgz8UJxYrS5BWi0yCqQKNcJWhNo%3D&se=2023-01-11T04%3A13%3A40Z&sp=r&rsc=public%2C%20max-age%3D864000%2C%20maxstale%3D86400&rsc=application%2Fpdf&rscd=inline%3B%20filename%3D%2252227_2012_Bower_Fairtrade_certification_of_sugar_cane.pdf%22

Table 10 Comparison of some Global GAP standards against the UN SDG's

VSS name	SDG 1	SDG 2	SDG 3	SDG 4	SDG 5	SDG 6	SDG 7	SDG 8	SDG 9	SDG 10	SDG 11	SDG 12	SDG 13	SDG 14	SDG 15	SDG 16
GLOBALG.A.P. - Aquaculture	24%	33%	40%	40%	15%	55%	13%	43%	14%	22%	37%	33%	5%	59%	46%	12%
GLOBALG.A.P. - Crops	8%	59%	40%	36%	0%	60%	26%	25%	28%	0%	34%	43%	0%	9%	34%	4%
GLOBALG.A.P. - Floriculture	12%	24%	33%	26%	0%	62%	20%	19%	28%	0%	31%	36%	0%	9%	30%	8%
GlobalG.A.P. - Livestock	40%	28%	14%	33%	10%	22%	6%	43%	14%	0%	28%	23%	5%	9%	25%	12%
GLOBALG.A.P. - Risk Assessment on Social Practice (GRASP)	32%	0%	11%	26%	15%	2%	0%	25%	0%	0%	0%	0%	0%	0%	0%	4%

Pacific analysis

Current situation

There are 4 GLOBALGAP approved certification bodies located in the Pacific.

	Head Quarters	Status	Geographical scope of GLOBALG.A.P. License
AsureQuality Ltd	NZ	Approved	All Countries except USA and Canada
Aus-Qual Pty Ltd	Australia	Approved	All Countries except USA and Canada
BSI Group ANZ Pty Ltd	Australia	Approved	All Countries except USA and Canada
SAI Global Certification Services Pty Ltd	Australia	Approved	All countries

GLOBALGAP have registered trainers who support producers in achieving GLOBALG.A.P. certification. All Registered Trainers have completed a GLOBALG.A.P. training program and passed the final exam. They are authorized to use official GLOBALG.A.P. training material and offer GLOBALG.A.P. recognized trainings to producers and other interested parties. There is one registered trainer in New Zealand (crops) and two in Australia (crops).

Strengths for inclusion in the SAFE project

- GLOBALGAP certification is a requirement a condition for the supply of fresh fruit and vegetables to many overseas retailers.

Weaknesses for inclusion in the SAFE project

- There does not appear to be widespread adoption of GLOBALGAP programmes in the SAFE countries.
- Fresh fruit and vegetables are not a focus for the SAFE project.
- The costs for GLOBALGAP certification and auditor input are unclear.

4.1.5 Other options

There are a number of other market certification schemes that could be suitable for the Pacific.

These include:

- Environmental foot prints – a number of programmes provide quantitative analysis of the impacts of production on environmental issues such as Green Houses Gases, water and

biodiversity. These – especially in relation to carbon/emissions have become increasingly in demand to address consumer and regulatory concerns regarding climate change.

- Social impact reporting – there are a number of programmes that provide specialist reporting on social impacts associated with agricultural production and associated value chains.
- Inhouse certification -some major food brands have established their own market assurance schemes.

The above have not been reviewed in detail in this report however if they are identified in the planned stakeholder survey, they could be the subject to further investigation.

4.2 Analysis by product

4.2.1 Agricultural and Horticultural products

Background

There is a wide diversity of agricultural and horticultural crops traditionally grown in the Pacific and some have been historically important sources of revenue such as coconuts.

The selection of agriculture/horticulture product market certification schemes needs to take into consideration the market acceptance, scope of the as well as the integrity of the certification scheme.

Pacific analysis

As outlined in section 4.1 there are a number of well-established market certification schemes operating in the Pacific including:

- Organic certification (2021)
 - Tropical and subtropical fruit – Oceania 76 Ha (Global production 292,000 Ha). Cook Islands 15Ha;
 - Vegetables – Oceania 4.035 Ha (Global production 421,000 Ha). Australia 3,902 Ha, French Polynesia 25Ha, Tonga 108Ha
- Fair trade – current certification of cocoa and coffee.

General references

- *The export of horticultural and high-value agricultural products from the Pacific islands.* (McGregor 2017) ⁴⁵
- Pacific Horticultural and Agricultural Market Access Plus (PHAMA Plus) Program [Review of existing access for horticultural products, seafood and sawn timber to Australia and New Zealand](#) (2019)
- [Helping Small Farmers Think About Better Growing and Marketing – A reference manual FAO \(2004\)](#) This is designed to help trainers and advisors guide small farmers in their efforts to grow and market their agriculture so as to earn more cash from their labour, their land, and their capital
- [Organic Agriculture and Fair Trade in Pacific Island Countries-](#) FAO (2009) This report provides a background to high value markets and explores the potential of organic agriculture and fair trade in PICs, with a specific focus on five main commodities: cacao, coffee, pepper, vanilla and virgin coconut oil.:
- [Pacific Export Context Analysis](#) – Phama Plus May 2021. This presents an overview of the social, economic, and business conditions and trends in the Pacific Islands, including indicators

⁴⁵ <https://pafonet.spc.int/attachments/article/206/PEB22-McgregorHortExports.pdf> Andrew M. McGregor *Pacific Economic Bulletin* Volume 22 Number 3 October 2007

that influence agriculture and horticulture export performance, and other issues that are critical for Pacific Island exporters and their suppliers.

- [Program Root Crops Market Study](#) Phama Plus (Fiji, Samoa, Tonga, Vanuatu) (2021).
- [Samoa Nonu Market Study](#) Phama Plus ⁴⁶
- [Turning value chain challenges into business opportunities](#) CTA.
- [Growing Island Exports: High Value Crops and the Future of Agriculture in the Pacific](#) (December 1, 2013) Morgan, Wesley, Crawford School Research Paper No. 05/2013,
- [Agricultural Value Chain Guide for the Pacific Island](#) - Making value chain analysis a useful tool in the hands of farmers, traders and policy makers.

Coconut specific

- *Workshop report: Pacific Coconut Sector Value Chain Workshop (July 11-13, 2017, Nadi, Fiji⁴⁷)* Pacific Community.
- [The project on assessment of coconut industry training manuals for the Pacific: final report, September 2017](#) SPC Cegumalua, A., Lesi, V. 2017.
- [An overview of the market for Pacific Island coconut products and the ability of industries to respond](#) McGregor, Andrew, Sheehy, Mark. SPC 2017.
- [Economics brief #3: Certified coconuts: the economics of establishing a participatory guarantee system for organic certification in Cicia, Fiji](#) Anon SPC 2015.
- [Coconut sector review](#) Phama Plus(2019).

4.2.2 Seafood

Background

The selection of seafood market certification schemes needs to take into consideration the market acceptance of the scheme as well as the integrity of the certification scheme. The Consumer Goods Forum - [Sustainable Supply Chain Initiative](#) (SSCI) is an important benchmark for market acceptance. The SSCI has developed criteria for the At-Sea Operations of sustainability programmes scope developed through an ongoing collaboration with the [Global Sustainable Seafood Initiative](#) (GSSI). GSSI has benchmarked 9 certification schemes. The purchase of products from these schemes is prioritised by *Consumer Goods Forum* members which makes selection of these schemes important for future market access. [Certified schemes](#) include: Marine Stewardship Council; GlobalGAP and ASC.

In 2016 IISD published a comprehensive review of seafood sustainability VSS including aquaculture and [wild catch](#) and includes an evaluation of the Marine Stewardship Council, IFOAM, GlobalGAP, Friends of the Sea and Aquaculture Stewardship Council standards.

In relation the integrity of the certification programmes – the scope of the programmes in relation to the UNSDG`s is illustrated below for the Friends of the Sea certification.

Table 11 Comparison of some sea food market certification programmes against the UN SDG`s

VSS name	SDG 1	SDG 2	SDG 3	SDG 4	SDG 5	SDG 6	SDG 7	SDG 8	SDG 9	SDG 10	SDG 11	SDG 12	SDG 13	SDG 14	SDG 15	SDG 16
Friend of the Sea (FOS) - Wild - Generic Sustainable fishing Requirements	40%	3%	14%	16%	21%	6%	6%	20%	0%	22%	20%	9%	16%	0%	22%	12%

⁴⁶

⁴⁷ <https://purl.org/spc/digilib/doc/7rin2> Cegumalua, A., Lesi, V. 2017

Pacific analysis

The current production and sales of seafood products with market certification programmes is unclear. Some references to projects and research related to seafood market certification in the Pacific is outlined below.

- *Linking global certification schemes and local practices in fisheries and aquaculture*⁴⁸.
- [SPC Live Reef Fish Information Bulletin #15 - December 2005](#) Anon.
- [SPC Traditional Marine Resource Management and Knowledge Information Bulletin #29 - May 2012](#).
- Huglo J. 2015⁴⁹. *New Caledonian Offshore Fishers Federation launches 'Responsible Fisheries' ecolabel*. SPC Fisheries Newsletter 147:28–34.
- *Solomon Islands' tuna fishery achieves MSC certification*
- *SO 22000 standards: A food safety management system* Talbot V. 2007⁵⁰.
- *EU market access regulatory compliance for Pacific Island countries and territories*⁵¹
- [A Qualitative Assessment of Standards and Certification Schemes Applicable to Aquaculture in the Asia Pacific Region](#) FAO 2007

4.2.3 Coffee

Background

A 2019 IISD report ([Global Market Report: Coffee](#)) provides a detailed analysis of the adoption of VSS in coffee value chains. The following information is extracted from this report.

- Coffee is one of the most traded agricultural commodities in the world: in 2017 alone, 70 per cent of total coffee production was exported, worth USD 19 billion. That same year, the sector had a retail market value of USD 83 billion, providing jobs for 125 million people. Coffee is grown on 12.5 million farms worldwide, of which 67–80 per cent are smallholder farms primarily located in developing countries,
- There is an increased adoption of voluntary sustainability standards (VSSs) by coffee producers: in 2016, 34.5 per cent of the market was made up of VSS-compliant coffee, while coffee that was potentially VSS-compliant represented 21.4 per cent, and conventional coffee production accounted for 44 per cent of the market. In 2021 Intracen reported that the global share of certified product was 20.8%.
- VSSs emerged in the coffee sector over 30 years ago, with non-governmental organizations, private sector actors and other industry stakeholders looking to provide roasters, retailers and consumers with the ability to distinguish between conventionally produced coffee and its more sustainable coffee equivalent. The latter options would be produced in a way that was conscious of emissions, biodiversity conservation, and worker health and safety considerations throughout the value chain, while also aiming to provide larger economic gains for producers.
- VSS-compliant coffee experienced a CAGR of about 24 per cent from 2008 to 2016, accounting for at least 34 per cent of coffee production overall. 4C, UTZ Certified, Rainforest Alliance, Fairtrade and Organic are the main VSSs in the coffee sector, when ranked by production size.
- VSS-compliant coffee and sustainable corporate initiatives are propelling the sector toward potentially becoming one of the first commodities to reach significantly high compliance with a sustainability initiative

⁴⁸ Bush S.R., Oosterveer P. 2012 *SPC Traditional Marine Resource Management and Knowledge Information Bulletin 29:15-21*.

⁴⁹ <https://purl.org/spc/digilib/doc/u5njik> Blaha F. 2016. SPC Fisheries Newsletter 150:26-27

⁵⁰ <https://purl.org/spc/digilib/doc/kmgijj> . SPC Fisheries Newsletter 120:40-43

⁵¹ <https://purl.org/spc/digilib/doc/sk46c> . Blaha F. 2013: Secretariat of the Pacific Community. Heads of Fisheries Meeting, Noumea, New Caledonia, 4-8 March 2013, 8th.

Table 12 provides a comparison of the main coffee VSS against the UN SDG's. Note this does not include UTZ certified which is now part of the Rainforest Alliance.

Table 12 Comparison of Coffee VSS against impact on SDG1s

VSS name	SDG 1	SDG 2	SDG 3	SDG 4	SDG 5	SDG 6	SDG 7	SDG 8	SDG 9	SDG 10	SDG 11	SDG 12	SDG 13	SDG 14	SDG 15	SDG 16
4C The Common Code for the Coffee Community	60%	62%	62%	63%	84%	71%	46%	68%	42%	77%	54%	57%	5%	9%	65%	92%
Baseline Code - Global Coffee Platform (GCP)	20%	35%	18%	50%	36%	40%	20%	41%	14%	55%	31%	33%	5%	0%	36%	28%
Rainforest Alliance RA 2017	56%	36%	62%	63%	42%	42%	20%	57%	14%	66%	45%	42%	27%	9%	69%	32%

Pacific options

The Pacific has a relatively small level of market certified coffee. In the Pacific the following coffee certification is active:

- The Rain Forest Alliance has certification in PNG – 1,814 (and possibly another 2,441 Ha) (Cocoa 1,849 Ha)
- Organically certified 2021⁵²– Oceania 68,238Ha (Globally 744,942 Ha certified organic coffee). All the certified organic production was in PNG.
- Fair trade – see 4.1.3

Some information is available in the following documents:

- [Coffee Commodity Updates](#) Phama Plus (2021) - provides information on coffee markets with recommendations for the PNG coffee sector.
- [Papua New Guinea Market Study](#) Phama Plus (2017)
- [Towards Sustainable Agricultural Commodities in Papua New Guinea – The case of Palm Oil, Coffee and Cocoa](#) UNDEP (2016)

4.2.4 Cocoa

Background

A 2019 report ([Global Market Report: Cocoa](#)) provides a detailed analysis of the adoption of VSS in cocoa value chains. The following information is extracted from this report.

- The global cocoa beans market is expected to grow at a compound annual growth rate (CAGR) of 7.3 per cent from 2019 to 2025 to reach USD 16.32 billion.
- The chocolate industry, which consumed 43 per cent of all cocoa in 2017, had a retail market value of USD 106.19 billion in 2017 and is expected to grow to USD 189.89 billion by 2026.
- The cocoa sector is projected to grow, driven primarily by its extensive appeal, popularity and wide use in the food and beverage industry. According to Euromonitor, increased demand for chocolate with perceived health benefits and more exotic flavours is expected in Western Europe and North America, which are the traditional chocolate consuming markets
- Within the sector, sustainably produced cocoa is also expected to grow faster than conventionally produced cocoa, with the rapid proliferation of voluntary sustainability standards (VSS) in the sector.
- In 2016, 29 per cent of the market was made up of VSS-compliant cocoa while cocoa that was potentially VSS-compliant represented 18 per cent and conventional cocoa production accounted for 53 per cent of the market. In 2021 Intracen reported that the global share of certified product was 22.7%.

⁵² FiBL & IFOAM – Organics International (2021): The World of Organic Agriculture. Frick and Bonn

- VSS- compliant cocoa experienced a CAGR of about 46 per cent from 2008 to 2016, accounting for at least 29 per cent of the total cocoa production in 2016. UTZ Certified, Rainforest Alliance, Fairtrade and Organic are the main VSSs in the cocoa sector when ranked by the volume of production they cover.
- Cocoa processors and manufacturers increasingly show interest in developing their own corporate sustainable cocoa sourcing programs, such as the Cocoa Life Scheme from Mondelez International and Cocoa Horizons from Barry Callebaut, which are displacing independent third-party standards.

The International Cocoa Organization and the World Cocoa Foundation are two important international Cocoa organisation.

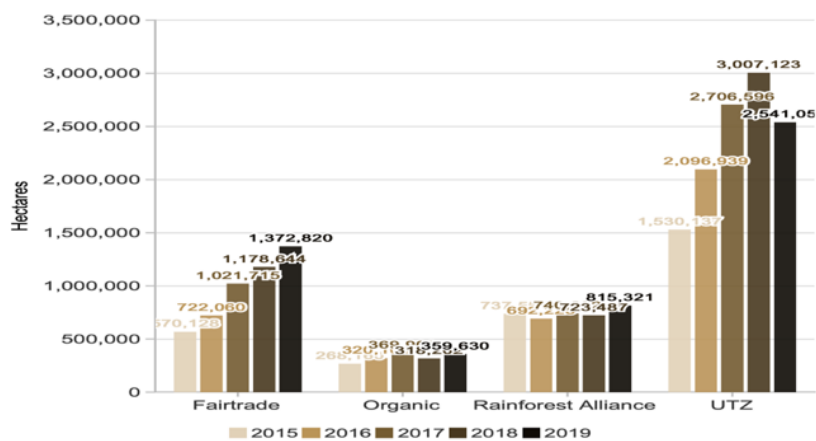


Figure 5 Trends in VSS certification for Cocoa ⁵³

Pacific analysis

In relation to the pacific the following market certification for cocoa has been identified.

- The Rain Forest Alliance has certification in PNG for 1,849 Ha of Cocoa (2021)
- Organically certified in(2021) – Oceania 1,935 Ha (Globally 384,507 Ha). All the certified area was in PNG.
- Fairtrade see section 4.1.3

References

- [Cocoa production in Samoa 2020](#)
- [Northern America and European Market Access for Pacific Cocoa](#) Phama Plus (2016).

4.2.5 Kava

Background

Kava has been traditionally grown in a number of Pacific countries. It has been selected as a focal crop for the SAFE project. The global kava root extract market is projected to grow from \$1.18 billion in 2022 to \$3.41 billion by 2029, at a CAGR of 16.29% in forecast period, 2022-2029.

Pacific analysis

Market certification options for inclusion in the SAFE project

Food Safety certification would be essential for any exported crops. Organic certification is currently provided for kava production in the Pacific. In addition kava quality standards have been established for Tonga, Samoa and Fiji. The Rainforest Alliance undertakes certification for herbs and spices⁵⁴.

⁵³ <https://digital.intracen.org/state-sustainable-markets-2021/cocoa/>

⁵⁴ <https://www.rainforest-alliance.org/resource-item/appendix-b-herbs-and-spices/>

References

The Pharma plus project has undertaken extensive work to develop and implement quality assurance programmes for Kava including:

- [Tonga Kava Quality Standard \(2020\)](#). This includes guidelines for training, traceability and inspection.
- [Samoa Ava Standard \(2018\)](#)
- [Samoa Ava Regulations \(2018\)](#)
- [Fiji Kava Quality Manual \(2017\)](#)
- [Fiji Kava Value Chain Analysis \(2018\)](#)
- [Case Study – Fiji’s Green Kava Innovation 2022](#)

4.2.6 Turmeric

Background

Turmeric is a flowering plant of the ginger family. The rhizomes are used in cooking. Curcumin, a bright yellow chemical produced by the turmeric plant is gaining importance world over as a potential source of new drug(s) to combat a variety of ailments. Turmeric oil is also used in aromatherapy and in the perfume industry. This crop has been grown commercially in Fiji for many years.

Pacific analysis

In 2021 Fiji exported US\$10.529m (4,749 tonnes) of Turmeric (source (ITC Trademap). The USA took 98% of exports. This represented 2.9% of world exports with Fiji being the 4th largest global exporter.

Options for inclusion in the SAFE project

Food Safety certification would be essential for any exported crops. Organic certification is currently provided for turmeric production and products in the Pacific and as with Kava – the Rainforest Alliance certification could be an option. It would be useful to clarify the market demand and value advantage for certification by the different market certification options.

References

- Economically Important Curcuma Species in the Fiji Islands⁵⁵
- Fiji News 2021 [Organic Fijian Turmeric is making its way into spice cabinets in the west](#). This is a good example of a company obtaining both organic (sustainable) and food safety (HACCP) certifications.
- [Global demand for turmeric rises](#) 2021 (Pacific Invest Fiji)

⁵⁵ Fiji Agricultural Journal Vol. 58, No. 1, 2020 <https://www.agriculture.gov.fj/documents/booklets/FAJ2020Final.pdf>

5.0 Consultation

5.1 Background

The information contained in this report was used to develop a survey to obtain additional information to support the selection of focal market certification programmes to be targeted by this project. The survey was also an opportunity to create awareness of the SAFE project and its intentions.

The identification of representative stakeholders to be surveyed was facilitated by POETCom and the wider SAFE team. They included:

- Members of Pacific Farmers, [Pacific Islands Trade Invest](#), PIPSO, National Chambers of Commerce and Export Councils and individual MSME.
- Representatives from relevant Pacific government and regional agencies such as those listed in Table 3.
- Reference to previous and current Pacific value chain support projects such as PAFPNET, [INNOV4AGPacific](#).

Following identification the survey will be sent out (using Survey Monkey software). Following the survey further consultation with key stakeholders will be undertaken through 1:1 meetings to obtain additional information on the current use of market certification schemes, the level of interest/demand for certification as well as their interest in participating in the project.

5.2 Survey results

The survey was prepared and used the Survey Monkey application. Links to the survey were sent out and the survey was open from September 20 to October 7 2022.

Responses

57 responses to the survey were obtained over that period.

- Age – 19% were under 35 years old, 23% between 35 and 50 years and 58% over 50 years.
- 42% of respondents were women and 58% men.
- Location of respondents

Table 13 SAFE Survey - countries of respondents

Country	No of respondents
Fiji	21
Samoa	11
Vanuatu	7
Australia/NZ	5
Palau	3
French Polynesia	2
Federated States of Micronesia	2
Kiribati	1
Marshal Islands	1
Niue	1
Papua New Guinea	1
Solomon Islands	2
Cook Islands	1
Regional	1
Not stated	1

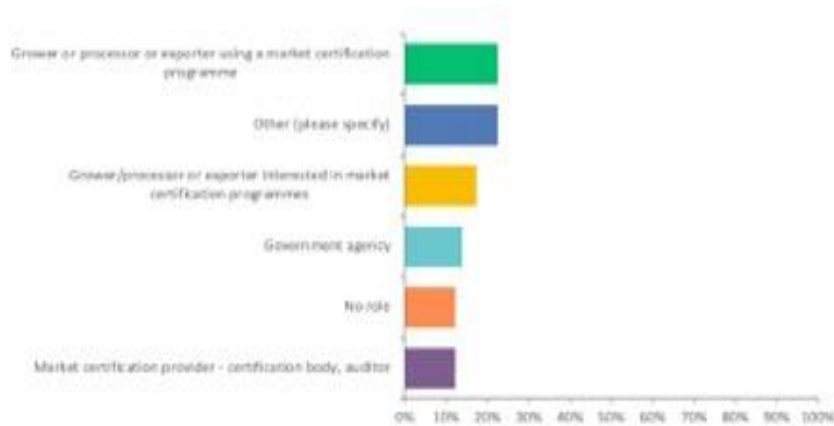
Table 14 Organisational representation SAFE Project survey respondents

Organisation	No of respondents
Private company – farm, processing, export	16
Farmer/Grower Organisation	1
Regional Organisation e.g PTI,	7

Government e.g Ministry of Agriculture, Trade, Investment Agency	8
Organic Association	5
Research e.g PHAMA Plus	4
Consulting company	3
Chamber of Commerce, business organisation	2
Private or not provided	2
Certification organisation	1

The following responses were obtained in relation to the question - *what role do you have in relation to market certification programmes ?*

Table 15 Respondent role in relation to market certification programmes



The largest group (23%) of respondents were growers/processors and marketers who are currently using a market certification programme followed by grower/processors interested in using a market certification programme (18%). There were 12 responses that selected the other response option. This included representatives from trade promotion organisations (6) and technical and input suppliers (2).

Response to the question to rank *The following benefits that you think are associated with the use of a market certification programme*

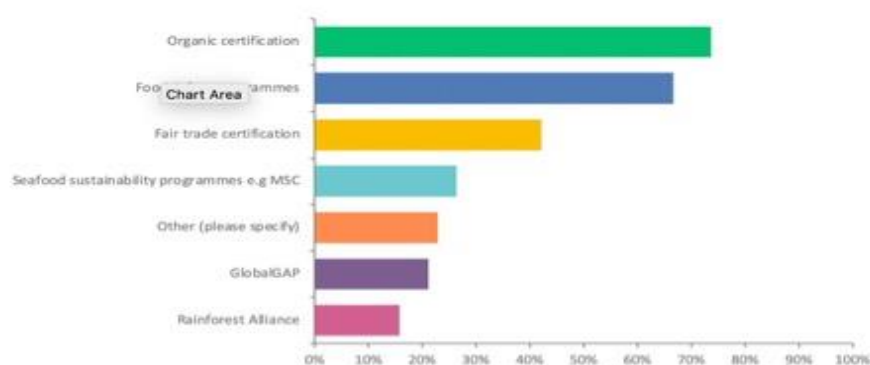
Table 16 Benefits associated with market certification programmes



Enabling access to higher value markets was ranked (score 5.41) as the most significant benefit associated with the use of market certification programmes. This was followed by the provision of assurance in relation to the safety of food that they produce (score 5.11). Other important benefits were – Improves the image/branding of our farms/business (score 4.5) and enables our business/farm to identify and manage risks (score 3.88).

Table 17 provides responses for the respondent’s knowledge of the market certification programmes that are active in their country?

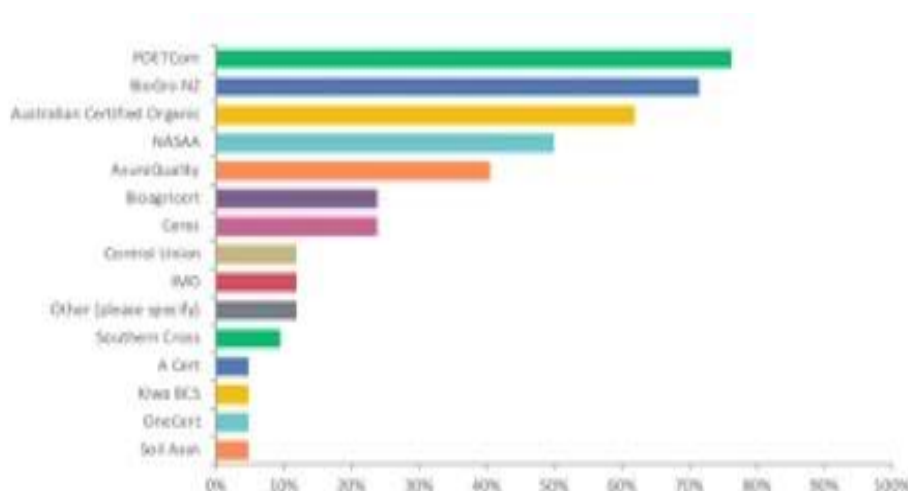
Table 17 Awareness of market certification programmes operating in the respondents country



Organic certification was the market certification programme that was most active with 75% of respondents reporting organic certification programmes were active in their country. This was followed by Food safety programmes (66%), Fairtrade certification (43%) and GlobalGAP 22%. Other schemes identified by 13 respondents included: retailer specific programmes, SEDEX, BRC. HACCP programmes were identified by 4 of these respondents and should be included as Food Safety programmes while other organic programmes (PGS, POETCOM) were identified by two respondents but should be included under organic certification.

Organic certification bodies identified by respondents are outlined in Table 18.

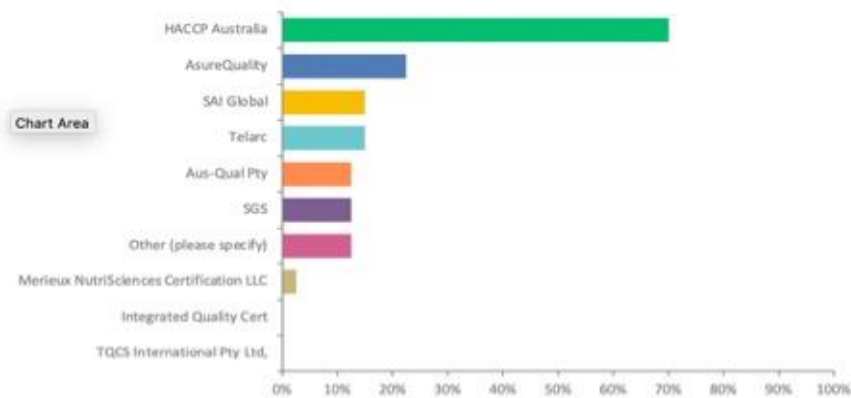
Table 18 Organic certification bodies identified



POETCom was recognised by 77% of respondents, followed by BioGro NZ (71%), Australian Certified Organic (62%), NASSA (50%) and AsureQuality (41%). Other organic certifiers identified by respondents included Ecocert and USDA Organic.

Table 19 Lists responses on what food safety certification bodies respondents new who operated in their country.

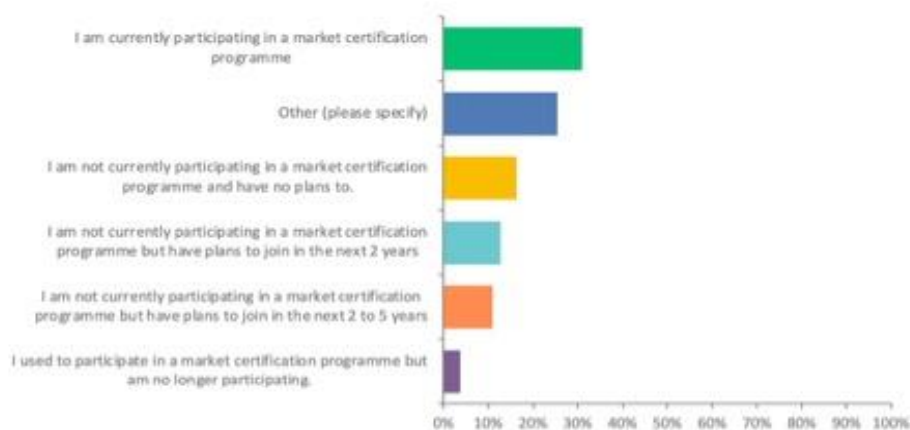
Table 19 Food Safety Certification bodies that you know that operate in your country



HACCP Australia was identified as the most recognised food safety certification body with 72% of respondents to this question reporting it. This may reflect the significant past and current work that has been undertaken by this organisations through the Phama plus and other projects. Other food safety providers listed included Bureau of Standards (Vanuatu), AOL, National Food Handlers Permit, and certificate of origin.

Survey participants were asked what their plans were in relation to the use of market certification with the results detailed in Table 20.

Table 20 Current use and intentions for the use of market certification programmes



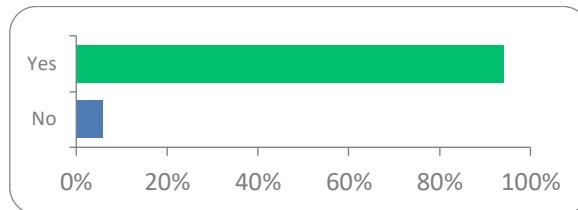
32% of respondents were currently participating in market certification programmes while 17% had no intentions of participating in market certification programmes. 14 respondents provided other responses which included that their role for example a trade promotion organisation meant that the question was not appropriate. Only 2 respondents identified that they used to be in a market

certification programme but were no longer participating. One of these identified that Covid had not allowed the auditor to come into the country as well as the costs associated with certification.

Market certification programmes that the 17 respondents were currently participating in included POETCom (7), other organic (6), SPG Biodetia, Biopasifika, SQF, BRC, HARP, SEDEX, Hot water treatment accreditation and HACCP.

There was a strong level of interest in gaining more information on the SAFE project as illustrated in Table Table 21

Table 21 Are you interested in more information on the SAFE project?



APPENDIX 1 LIST OF SURVEY RESPONDENTS

Name	Organisation	Country	Email Address
Rebecca Tavioni	Cook Islands Chamber of Commerce	Cook Islands	ceo@commerce.co.ck
Ulrich Diekmann	PIFS	Australia	ulrichd@forumsec.org
Oliver	Farm Support Association	Vanuatu	sapv@vanuatu.com.vu
Benuel Tarilongi	Vanuatu Organic Committee	Vanuatu	tabenuel@gmail.com
Irene Olkeriil	Palau Chamber of Commerce	Palau	ireneolkeriil@gmail.com
Ian wilson	Member of a farmer network	Vanuatu	wilsonian45@gmail.com
Fritz Kruse	Ministry of Agriculture & Fisheries (MAF)	Samoa	fritz.kruse@maf.gov.ws
Deborah	Private	Fiji	deborah.naivaluwaqa@gmail.com
Lagi Felise	Nissi Samoa	Samoa	feliselagi05@gmail.com
Atuaisaute Misipati	Samoa Business Hub	Samoa	saute@samoabusinesshub.ws
Waisiki Tamani	Oceania nursery	Fiji	wisetamani67@gmail.com
Lisala Dyer	Investment Fiji	Fiji	lisala@investmentfiji.org.fj
Clyve Westerland	Ah Liki Wholesale	Samoa	clyvewestland@ahliki.com
ARIF KHAN	CACAO FIJI	Fiji	fjicacao@gmail.com
MAUNAS	DAG - Direction de l'agriculture	French Polynesia	laurent.maunas@rural.gov.pf
Poeti	PGS BIO FETIA	French Polynesia	direction@biofetia.pf
John Caldeira	Fiji Beekeepers Association	Fiji	john@outdoorplace.org
Richard Channing	Beyond Green Consulting	Fiji	rchan4u@hotmail.com
Litia	Loving Islands	Fiji	litia@lovingislands.com
Subashni Sobhana Lal	Freedom Farms (Fiji)	Fiji	freedomfarmsfiji@gmail.com
Terry Adlington	Tanna Coffee	Vanuatu	coffeevanuatu@gmail.com
Fane Raravula	Tavioka Growers Pte Limited	Fiji	fraravula@gmail.com
Andrew Malden	Fiji's Fruit Forum	Fiji	fijifruitandagroforestryexpo@gmail.com
Moses P. Pelomo	Kastom Gaden Association (KGA)	Solomon Islands	moses.pelomo@gmail.com
alain jacobe	vocc	Vanuatu	al1jacobe@hotmail.com
apiame cegumalua	Api Food Consulting Services	Fiji	acegumalua@gmail.com
Kuinimeri Asora-Finau	Scientific Research Organisation of Samoa	Samoa	kuinimeri.finau@srosmanagement.org.ws
Shiori	R&L keil Holdings Ltd	Samoa	keilnoni@gmail.com
Sylvie Salanoa	Maillelani Samoa Body Care	Samoa	info@mailelani-samoa.com
Christopher Tep	Caltep Holdings Ltd	Papua New Guinea	tep.chris1970@gmail.com
Stanley Raffilman	Department of Resources and Development	Federated States of Micronesia	sraffilman@rd.gov.fm
Aiaz Hamid	Redox Refinery	Fiji Islands	aiazhamid@redox.com.fj
Amrita Chand		Fiji	amritachand13@gmail.com
Jamal Talagi	Niue Organic Farmers Association	Niue	niue.organicfarmers@gmail.com
Papalii G Percival	Natural Foods International	Samoa	naturalfoodsmd@gmail.com
Hana Gauta Ketu	GK Consultants	Samoa	gauta1903@gmail.com
Asuao Kirifi Pouono	PHAMA Plus	Samoa	k.pouono@phamaplus.com.au
Bronwyn Wiseman	PHAMA Plus program	Australia	b.wiseman@phamaplus.com.au
Gerhard Stemmler	Herbex PTE Ltd & Pflanax PTE Ltd	Fiji	gerhard.stemmler@gmail.com
Jeremy Grennell	PTI Australia	Australia	jeremy.grennell@pacifictradeinvest.com
Tekataake Oromita	Biosecurity Services and Plant Health Section of A	Kiribati	taakeuee@gmail.com
Andreas Lombardozzi	LionFish Vanuatu Ltd	Vanuatu	andreas@africanpacific.com
Carolyn D Ngiraidis	Palau Organic Growers Association	Palau	aliiibelau@gmail.com
Tanuvasa Semy Siakimot	PHAMA Plus	Fiji	semy.siakimotu@gmail.com
Peter Kjaer	Pacific Produce Pte.Ltd	Fiji	pkppl@connect.com.fj
Michael Hoóta	Ministry of Agriculture & Livestock	Solomon Islands	Michael.Hoota@sig.gov.sb
Ellen Callister	Pacific Trade Invest	New Zealand	ellen.callister@pacifictradeinvest.com
Aude	PTINZ		
Glynis Miller	Pacific Trade Invest NZ	New Zealand	glynis.miller@pacifictradeinvest.com
Kyle Stice	Pacific Farmer Organisations	Regional	manager@pacificfarmers.com
Karness Kusto	MIOFA	RMI	kustokarness@gamil.com
Adelino Lorens	Island Food Community of Pohnpei	FSM-Pohnpei	lorenselino@gmail.com
Edwin Tamasese	Samoa Coconut Cluster Ltd	Samoa	edwintamasese@gmail.com
Ltelatk Fritz	Palau Organic Growers Association	PALAU	ltelatk@willbsoil.com
Peter Kaoh	Farm Support Association	Vanuatu	sapv@vanuatu.com.vu
Maryann Lockington	SPC	Fiji	shir.locks92@gmail.com