

# Fair Trade in Europe 2005

Facts and Figures on Fair Trade in 25 European countries



A survey prepared by  
Jean-Marie Krier

Published by  
FLO – Fairtrade Labelling Organizations  
IFAT – International Fair Trade Association  
NEWS! – Network of European World Shops  
EFTA – European Fair Trade Association



*«Fair Trade teaches us that consumers  
are not condemned to be only bargain-hunters...  
Fair Trade reminds us that trade is about people,  
their livelihoods, their families,  
sometimes their survival»*



# CONTENTS

<b>Foreword</b> .....	p. 4
<b>Introduction</b> .....	p. 5
<b>Executive Summary</b>	
<b>Fair Trade in Europe: An ongoing success story</b> .....	p. 7
<b>Mapping Fair Trade in Europe</b>	
a: Number of Worldshops .....	p.10
b: Supermarkets selling Fair Trade products .....	p.11
c: Paid staff in Fair Trade organisations .....	p.12
d: Turnover importing organisations .....	p.13
e: Turnover Worldshops .....	p.14
f: Retail value labelling organisations .....	p.15
g: Number of licensees .....	p.16
h: Expenditures on PR, education and marketing .....	p.17
<b>Part One</b>	
<b>Facts and Figures on Fair Trade in Europe</b> .....	p.19
1. Scope of the survey and methodology .....	p.20
2. Fair Trade structures in Europe .....	p.22
2.1 Fair Trade organisations .....	p.22
2.2 Fair Trade related organisations .....	p.23
2.3 Fair Trade's commercial partners .....	p.24
2.4 International Fair Trade organisations in Europe .....	p.24
2.5 Cooperation in Europe .....	p.26
3. Fair Trade market developments in Europe .....	p.28
3.1 Fair Trade importers .....	p.28
3.2 Fair Trade retailers .....	p.28
3.3 Fairtrade labelling .....	p.29
3.4 Awareness raising and campaigning .....	p.31
3.5 Five years of Fair Trade dynamics in Europe: A statistical overview .....	p.31
4. The challenges ahead .....	p.33
<b>Part Two</b>	
<b>Country Studies</b> .....	p.35
Austria – Belgium – Czech Republic – Denmark – Finland – France – Germany – Greece – Hungary – Ireland – Italy – Latvia – Lithuania – Luxembourg – Malta – The Netherlands – Norway – Poland – Portugal – Slovakia – Slovenia – Spain – Sweden – Switzerland – United Kingdom	
<b>Part Three</b>	
<b>Annexes</b> .....	p.69
Annex 1: Contact details of the Fair Trade organisations which participated in this survey .....	p.70
Annex 2: Detailed summary table .....	p.80
Annex 3: Notes on the summary table .....	p.82
Annex 4: International membership list .....	p.83
Annex 5: Methodological remarks .....	p.86

# FOREWORD

The Heinrich Böll Foundation is proud to have funded the study “Facts and Figures on Fair Trade in 25 European countries”. Why did we support this research?

One of the main aims of the Foundation is to find ways to address the unequal global trading relations between the North and the South. The development of Fair Trade is a positive step towards achieving the goals that the Foundation has as its guiding principles. As stated in our statutes, *“The Foundation’s work is oriented towards the fundamental political principles of ecology, democracy, solidarity and non-violence (...) the Foundation encourages and supports groups and individuals observing their responsibility to shape the world more peacefully, to conserve our natural environment and to advance the world-wide recognition of human rights”.*

Fair Trade enables small farmers and producers to maintain a decent standard of living through their economic activities. It also allows consumers to actively make a positive contribution towards a change in trading and production practices. The development of Fair Trade sales from specialist outlets to mainstream supermarket chains will hopefully contribute towards more just and equitable trading relations on an international scale.

As Fair Trade continues to develop and consumption continues to increase, the European Union will have to demonstrate its commitment to Fair Trade. Developing countries need to be sustained in their quest to improve the social and economic living conditions of their populations.

Infrastructure within the developing countries will improve as a result, giving small scale farmers and rural entrepreneurs the opportunity to increase the added-value of their products. With a greater percentage of processed farm products, the developing world will be able to improve their commercial trade balance.

Fair Trade is not the magic wand that will solve all global injustices but it is undoubtedly one key element in changing the complex and unjust trading realities for the better.

Claude Weinber  
Director  
Heinrich Böll Foundation  
EU Regional Office – Brussels



# INTRODUCTION

Fair Trade is entering a new stage. From modest beginnings in the 1950s it has now developed into a worldwide movement, benefiting millions of producers and their families, farmers and workers in developing countries. International Fair Trade sales have been growing more than 20% every year since the beginning of the 21st century. More and more consumers want to be sure that producers receive a fair deal for their products. They want to know the conditions under which the chocolate or bananas they are eating have been produced. They want to be confident that the jewellery or clothes they wear have provided the producers with the means to pay for their food and housing and enabled them to send their children to school.

This piece of research proves the success of Fair Trade in Europe. Fair Trade has become much more than a “niche market” for socially-aware and middle-class Northern consumers. It is expanding into mainstream distribution channels and is increasingly being recognised by consumers, public authorities and even private companies as an efficient tool for poverty eradication and sustainable development.

However, a lot of work needs to be done to sustain this growth and to extend the related benefits to even more producers. Europe is the biggest market for Fair Trade products with an estimated 60 to 70% of all global sales and there is a huge potential for further growth. By collecting the available data, this research is one important step in identifying new and innovative ways to fulfil this potential.

Certain conclusions can be drawn from the study. A major conclusion is the importance for the *Fair Trade market* of a strong *Fair Trade movement*, often sustained by volunteers, who organise public events, Fair Trade breakfasts or fairs or who convince their local authorities to become a Fair Trade town.

Additionally, the retailers – both the specialised Fair Trade shops (the “Worldshops”) and the supermarket chains that prominently place Fair Trade products on their shelves – are key in the progress of Fair Trade consumption.

Public institutions can also play a strong role. Thanks to the pressure of many members of the European Parliament, Fair Trade coffee and tea is now being served at all the parliament meetings. Civil servants of the European Commission can buy Fair Trade products in their cafeterias and many local authorities have included Fair Trade requirements in their public procurement policies or in their tenders for school catering services. Public purchasing policies should always include fair criteria.



For funding and practical reasons, this study – which builds on a previous survey carried out in the year 2000 – had to focus on Europe only. But the Fair Trade movement is truly global, with members in more than 60 countries worldwide. Figures about Fair Trade trends in North America and the Pacific Rim are currently being collected by the US based Fair Trade Federation.

A comprehensive collection of data about Fair Trade producers is another important task ahead. Much research has been carried out to assess the impact of Fair Trade on producers in developing countries but so far there is no clear methodology as how to best quantify this impact. And while we know that many women are involved with Fair Trade, particularly in the production of handicrafts, we do not have a systematic analysis of the impact on the lives of women which would enable the Fair Trade movement to draw conclusions for further improvements.

South-South Fair Trade, with Southern producers and exporters increasingly selling their products on local markets or to neighbouring countries, represents a new stage in the evolution of Fair Trade. Estimations show that Fair Trade sales in producing countries are growing dramatically. How can this trend be sustained and further developed?

These are only some of the many areas where further investigation is needed. A systematic collection of all research available would be a very useful first step.

The study also shows that Fair Trade is much more than a business. It is an instrument to make poverty history. The mission of the international Fair Trade movement is that all trade should be fair. Our experience demonstrates that fair and responsible trading relationships are possible. Based on this knowledge we ask other companies to review their current way of working and to incorporate fair principles into their business practices. We also ask trade policy makers to take the needs and concerns of small producers into account. After several rounds of international trade negotiations, the world trading system is still deeply unfair and needs to drastically change if it is to contribute to sustainable development and poverty reduction.

There are some lessons to be learned from Fair Trade for trade policy making, such as the need to protect and support the weaker partners in the trading relationship and to take the social and environmental conditions of production into account in trade negotiations, in order to avoid a constant race to the bottom in the global market place.

For the first time, this research was jointly carried out by four international Fair Trade associations, namely FLO (Fairtrade Labelling Organizations), IFAT (International Fair Trade Association), NEWS! (Network of European Worldshops) and EFTA (European Fair Trade Association). It demonstrates the increased collaboration among these four associations who now have a joint advocacy office in Brussels.

We are very grateful to the author of the survey, Jean-Marie Krier, who patiently awaited and chased the questionnaire responses of 126 organisations and other contacts throughout Europe, and carefully collected and evaluated all answers, filling in the remaining gaps wherever possible. We are also grateful to the Heinrich Böll Foundation who funded this survey and with whom we hope to work on future projects.

Anja Osterhaus  
Fair Trade Advocacy Co-ordinator

# EXECUTIVE SUMMARY

## FAIR TRADE IN EUROPE: AN ONGOING SUCCESS STORY

With Fair Trade products now available from nearly **79,000 points** of sales throughout Europe, the concept of a fairer exchange between marginalised producers in Africa, Asia and Latin America and consumers in the industrialised countries has become firmly grounded.

This survey collects data from national and international Fair Trade organisations in 25 European countries and reveals that the annual aggregate **net retail value of Fair Trade products (labelled and non-labelled) sold in Europe now exceeds € 660m<sup>1</sup>**. This is considerably over double the figure five years ago, when it was estimated to be about €260m. The increase of 154% over 5 years represents a sustained average annual increase of about 20% per year.

Fair Trade has thus become **one of the fastest growing markets in the world**. About €120m of the annual retail sales are generated through sales via the **Worldshops**. There are now over 2,800 of these specialist shops within Europe, stocking almost exclusively Fair Trade products.

As pioneers of the Fair Trade movement they count on the contribution of about 100,000 volunteers all over Europe. In recent years many activities aimed at professionalizing the Worldshops have been highly successful.

In the 25 countries dealt with in this survey about 200 **Fair Trade importing organisations** contribute to the Fair Trade market, by either supplying the traditional Fair Trade markets (i.e. Worldshops, church and solidarity groups, etc.) or the commercial market, or both. Many new companies have entered the market in the last five years and –apart from a few rare exceptions– older players have seen their turnover increase substantially in the last few years.

The most significant part of the overall increase of Fair Trade sales has been achieved with labelled products, particularly with coffee and bananas. There are now **Fairtrade labelling initiatives** in 15 European countries, including Spain, the latest newcomer. The total value of products sold under Fair Trade labels in 14 European countries<sup>2</sup> is about €597m.

A large part of this growth would not have been possible without a growing number of **commercial partners** becoming involved through the Fairtrade labelling schemes. Some of these partners have invested heavily in bringing Fair Trade to their national supermarkets. Today Fairtrade labelled products can be bought in about 55,000 supermarkets all over Europe.

The market impact is becoming impressive.

In Switzerland 47% of all bananas, 28% of the flowers and 9% of the sugar sold are now Fairtrade labelled. And in the UK, a market with eight times the population of Switzerland, Fairtrade labelled products have achieved a 5% market share of tea, a 5.5% share of bananas and a 20% share of ground coffee.

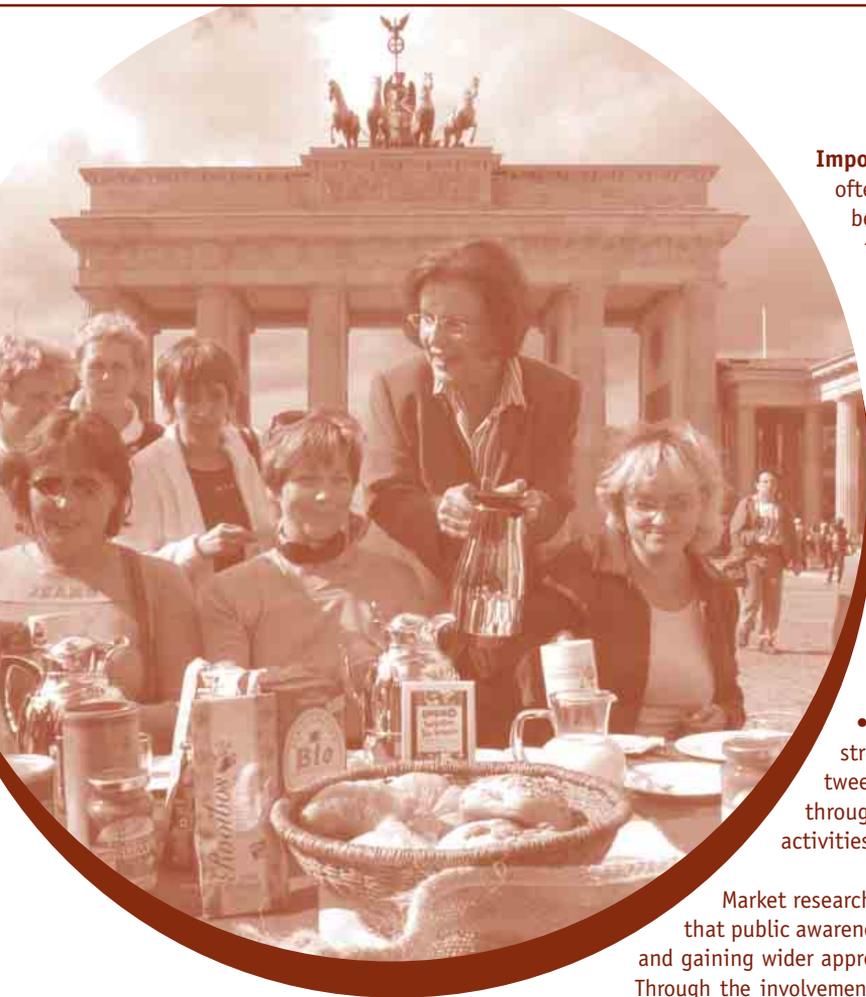
Much of the recent success is also due to increasing cooperation between the traditional Fair Trade players in Europe. Importing organisations, Worldshops and labelling organisations have built up their **international networks**, and these networks are also cooperating intensively at European and even global level.

The situation of Fair Trade in Europe varies, with the establishment of very new markets (especially in the new Eastern EU-member countries) to countries with very mature markets and organisations.

The situation also differs greatly depending on which specific aspects are taken into account. Nevertheless, Fair Trade players identified the most important **challenges** as follows<sup>3</sup>:

For the **Worldshops**, which represent the oldest pillar of Fair Trade, the key challenges are:

- To identify further sources of growth by continuing to professionalize the operations of Worldshops.
- To develop a well-balanced monitoring system in order to gain credibility in the eyes of the consumer.
- To find the right balance between their business operations and the mission to provide space for political action.



**Importing organisations**, who often find themselves situated between competing demands from producers on the one hand and consumers on the other, face the three following most important market-oriented challenges:

- The importance of building greater brand and company loyalty in the face of increasing competition.
- The need for importers to identify new sources of growth outside of the supermarkets.
- The need to further strengthen cooperation between importing organisations through the establishment of joint activities.

Market research in most countries indicates that public awareness of Fair Trade is increasing and gaining wider appreciation.

Through the involvement of both the traditional Fair Trade players (importers, Worldshops and labelling organisations) along with the increasing number of commercial partners, prospects for continuing to deliver positive benefits to Fair Trade producers are high.

The **Fair Trade success story** is obviously destined to continue for a while yet!

For the **labelling organisations** (the most recent newcomers to the Fair Trade movement), the situation looks quite different:

- Firstly they will need to effectively manage their considerable growth, which is likely to continue for some time.
- Secondly, with more of the big players and multinationals showing an interest in Fair Trade labelling, it will be crucial to find innovative ways to co-operate with multinationals, yet still remain critical where necessary.
- Thirdly, a balance needs to be found between the desired need for standardization on the one hand, and tendencies of overregulation from official bodies on the other.

*1 Most detailed figures that go into this aggregate figure refer to the financial year 2004, i.e. ending between 1 July 2004 and 30 June 2005*  
*2 Without Spain, where the label was launched in October 2005 only*  
*3 See the respective chapter for more details*

**Table 1: Five years of Fair Trade dynamics in Europe: A statistical overview**

	Five years ago <sup>4</sup>	Latest year available <sup>5</sup>	% change
<b>Importing organisations</b>	<b>97</b>	<b>200</b>	<b>+106</b>
<b>Sales Outlets</b>			
Worldshops	2,740	2,854	+ 4
Supermarkets	43,100	56,700	+ 32
Others	18,000	19,300	+ 7
<b>TOTAL</b>	<b>63,800</b>	<b>78,900</b>	<b>+ 24</b>
<b>Paid staff (full-time equivalent)</b>			
Importing organisations	746	851	+ 14
Worldshops associations	32	107	+ 234
Labelling organisations	71	113	+ 59
<b>TOTAL</b>	<b>849</b>	<b>1,071</b>	<b>+ 26</b>
<b>Turnover, in 000 €</b>			
Importing organisations	118,900	243,300	+ 105
Worldshops, net retail value	41,600	103,100	+ 148
Labelling org., net retail value	208,900	597,000	+ 186
<b>Education / PR / marketing, in 000 €</b>			
Importing organisations	5,600	11,400	+ 104
Worldshops associations	1,000	1,700	+ 70
Labelling organisations	3,500	5,100	+ 46
<b>TOTAL</b>	<b>10,100</b>	<b>18,300</b>	<b>+ 81</b>
<b>All World Shops, in 000 €</b>			
Net retail value, estimate	92,000	120,000	+ 30
<b>All Fair Trade products, in 000 €</b>			
Net retail value, estimate	260,000	660,000	+ 154

## Remarks

1. All figures are minimum figures as they do not include those organisations which have not contributed.
2. It is important to understand that in many cases the above comparisons do not refer to the same sample, organisations included in 2001 are not necessarily included in 2005 and vice versa, depending on the willingness of the organisations to contribute to this survey.
3. More details can be found in the country chapters and in Annex 2, which gives the exact breakdown of the above figures at national level.
4. For a comprehensive understanding of the above figures see the explanations given in Annex 3.

<sup>4</sup> As presented in the "Fair Trade in Europe 2001" edition

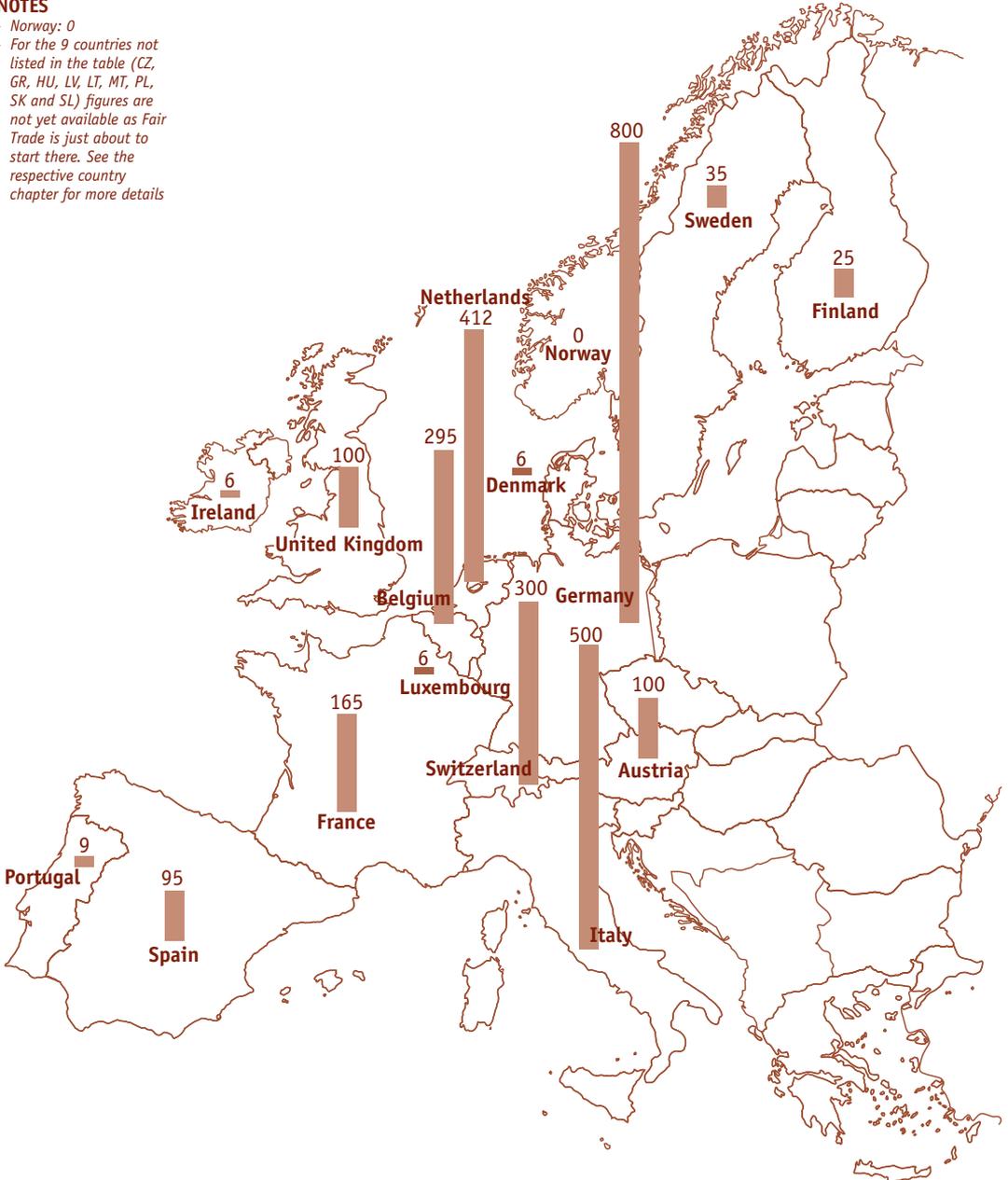
<sup>5</sup> In general these figures relate to 2004, i.e. the financial year ending between 1 July 2004 up till 30 June 2005; in a few exceptional cases figures are from 2003

# MAPPING FAIR TRADE IN EUROPE

## A: NUMBER OF WORLDSHOPS (OCTOBER 2005)

### NOTES

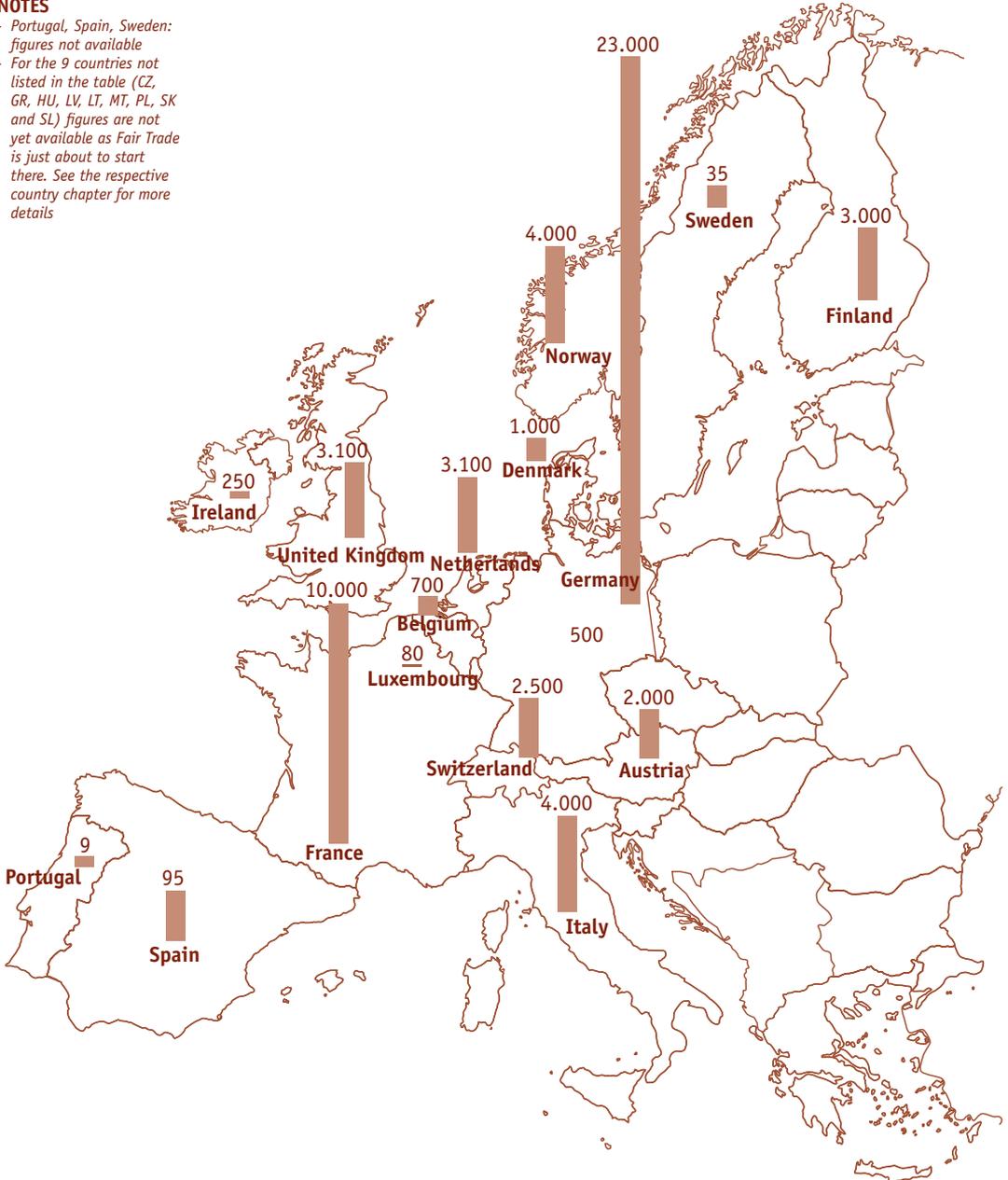
- Norway: 0
- For the 9 countries not listed in the table (CZ, GR, HU, LV, LT, MT, PL, SK and SL) figures are not yet available as Fair Trade is just about to start there. See the respective country chapter for more details



## B: SUPERMARKETS SELLING FAIR TRADE PRODUCTS (OCTOBER 2005)

### NOTES

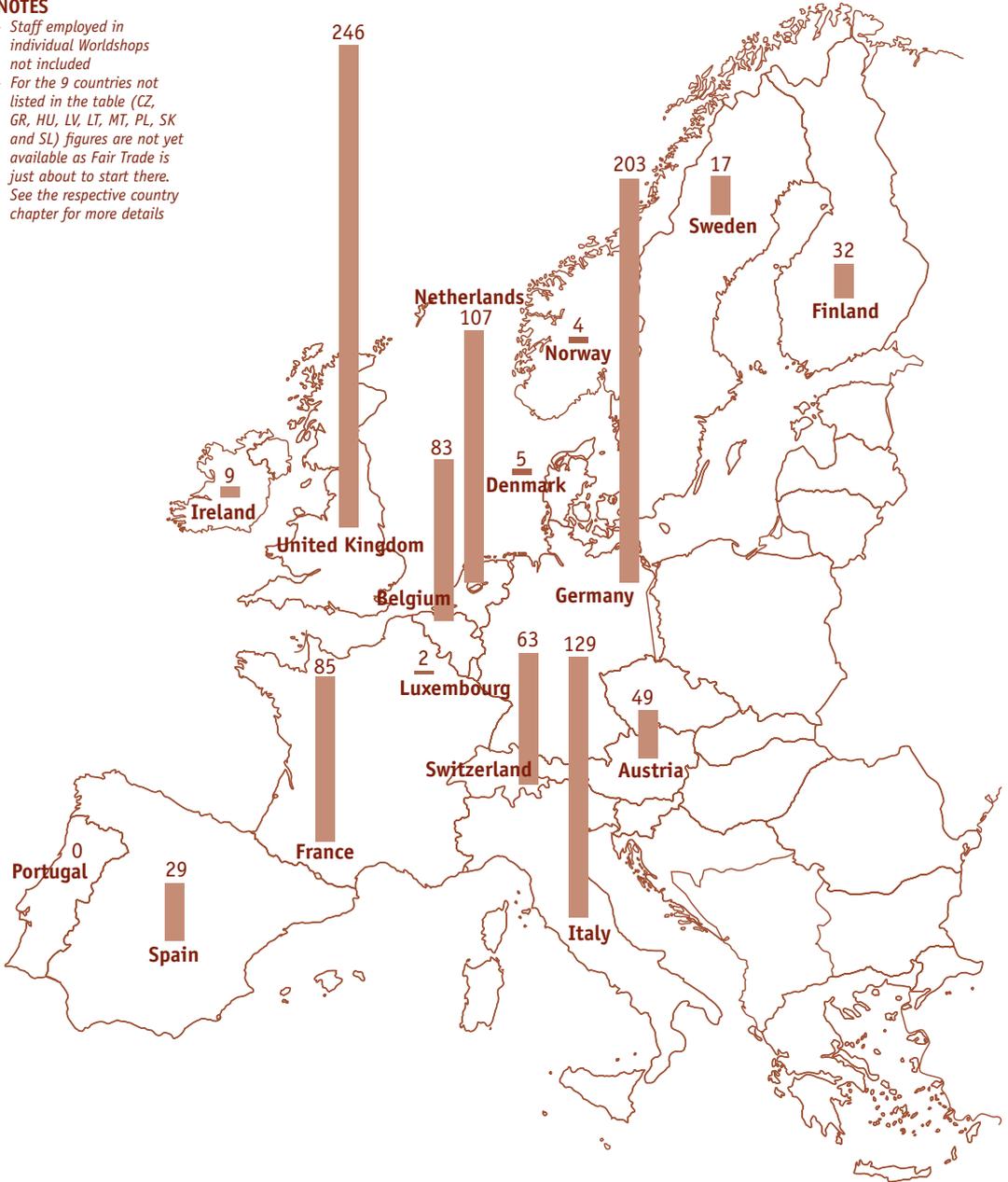
- Portugal, Spain, Sweden: figures not available
- For the 9 countries not listed in the table (CZ, GR, HU, LV, LT, MT, PL, SK and SL) figures are not yet available as Fair Trade is just about to start there. See the respective country chapter for more details



## C: PAID STAFF IN FAIR TRADE ORGANISATIONS (FULL-TIME EQUIVALENTS - OCTOBER 2005)

### NOTES

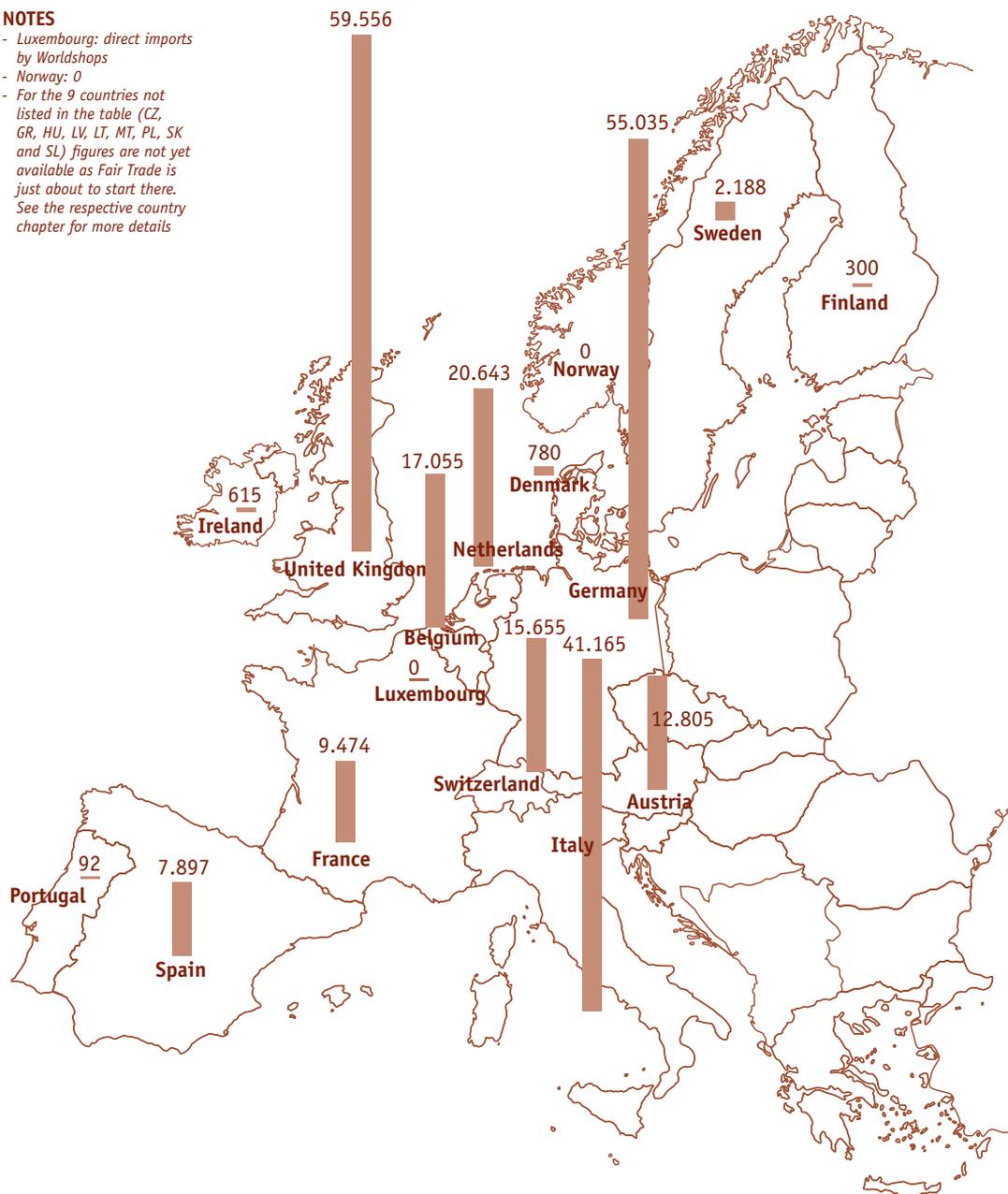
- Staff employed in individual Worldshops not included
- For the 9 countries not listed in the table (CZ, GR, HU, LV, LT, MT, PL, SK and SL) figures are not yet available as Fair Trade is just about to start there. See the respective country chapter for more details



## D: TURNOVER IMPORTING ORGANISATIONS IN 000 € (OCTOBER 2005)

### NOTES

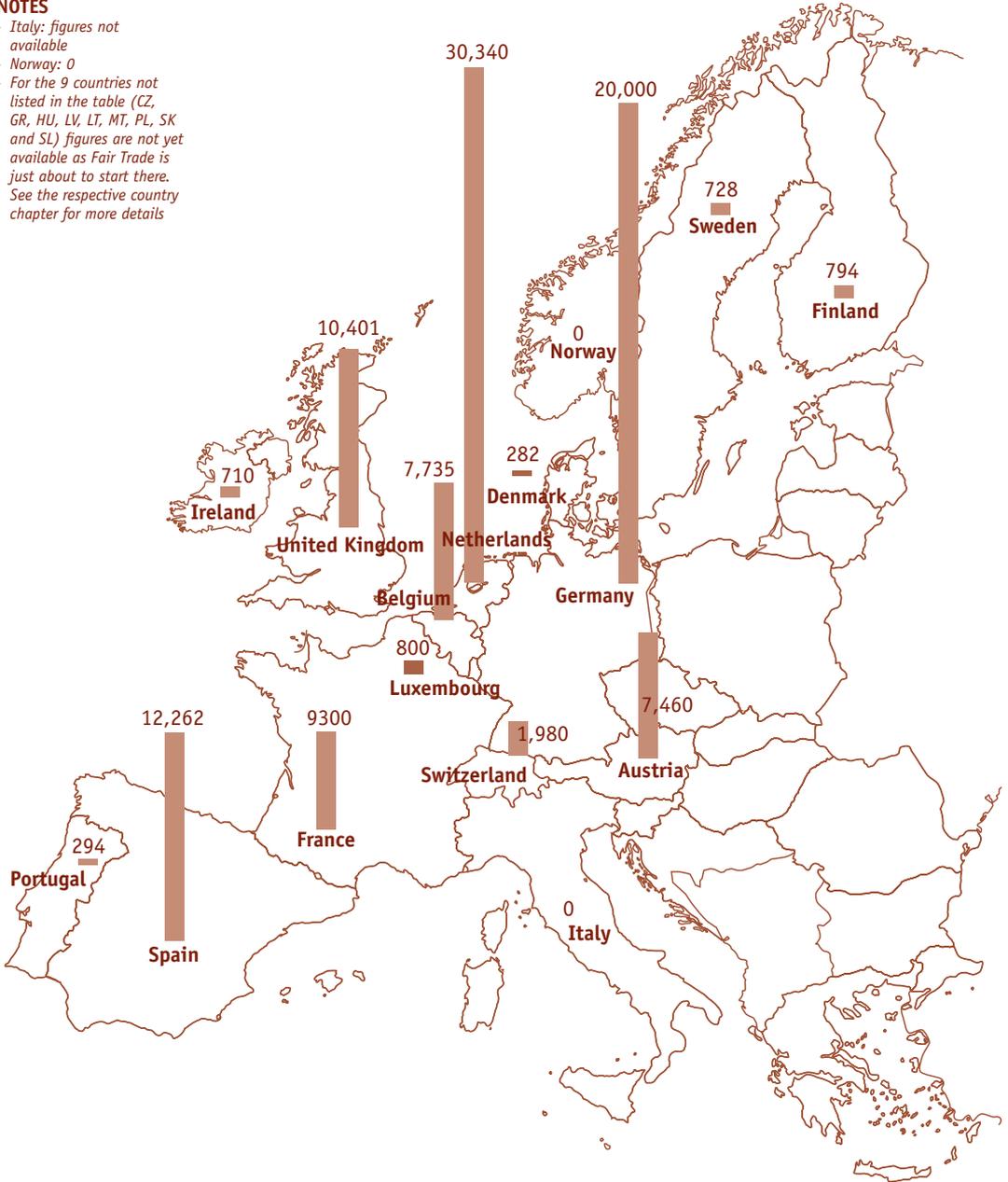
- Luxembourg: direct imports by Worldshops
- Norway: 0
- For the 9 countries not listed in the table (CZ, GR, HU, LV, LT, MT, PL, SK and SL) figures are not yet available as Fair Trade is just about to start there. See the respective country chapter for more details



## E: TURNOVER WORLDSHOPS IN 000 € (OCTOBER 2005)

### NOTES

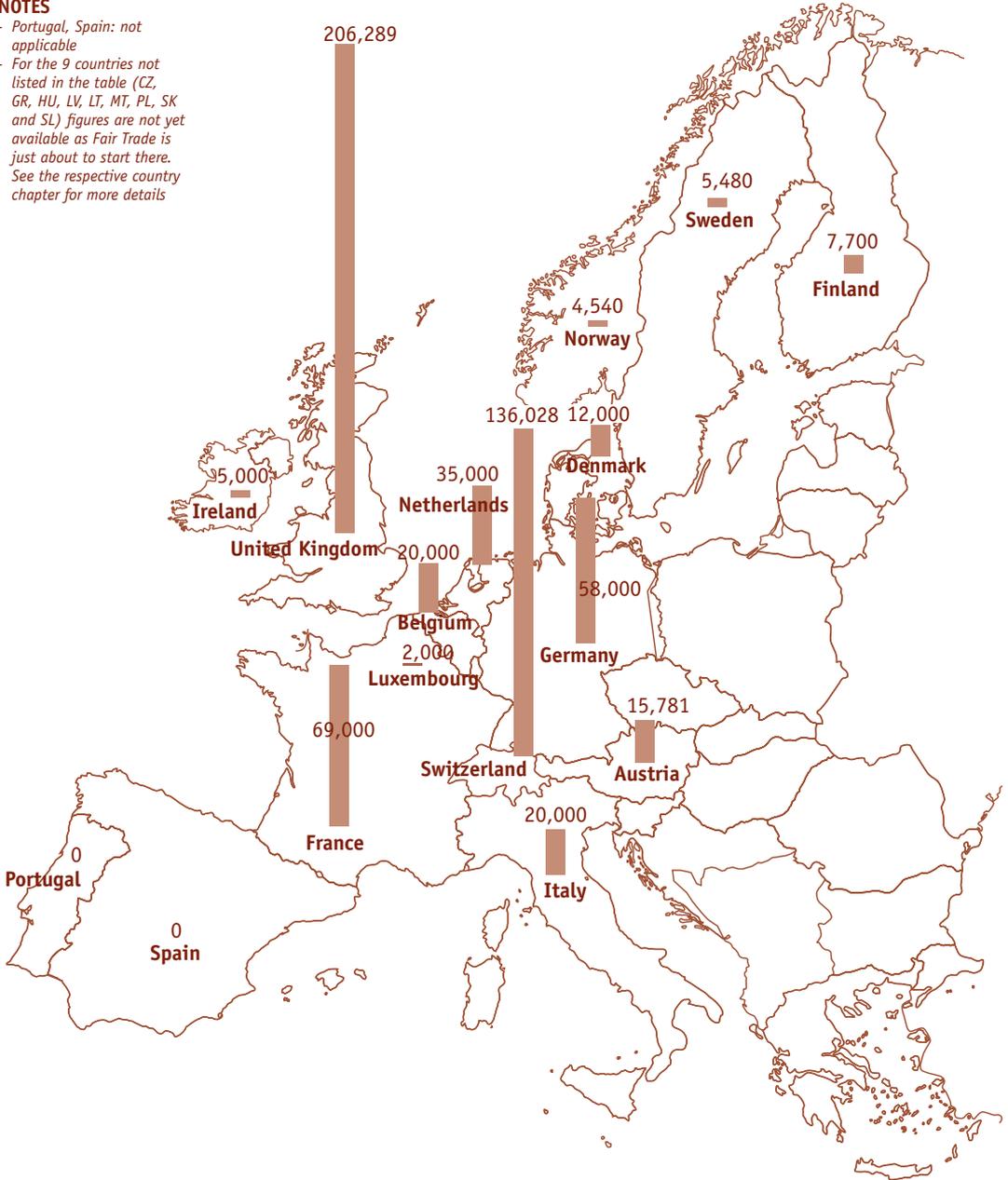
- Italy: figures not available
- Norway: 0
- For the 9 countries not listed in the table (CZ, GR, HU, LV, LT, MT, PL, SK and SL) figures are not yet available as Fair Trade is just about to start there. See the respective country chapter for more details



## F: RETAIL VALUE LABELLING ORGANISATIONS IN 000 € (OCTOBER 2005)

### NOTES

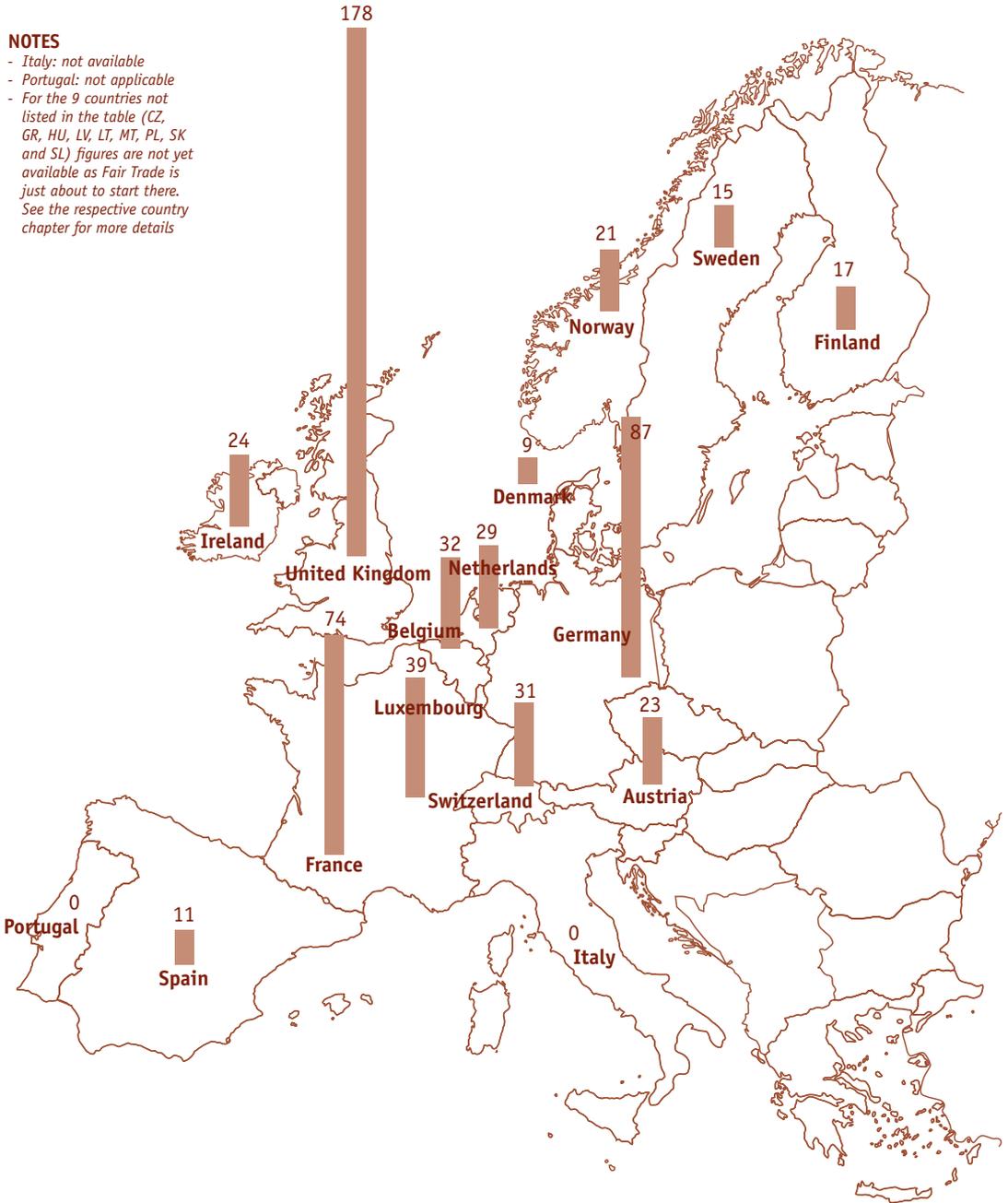
- Portugal, Spain: not applicable
- For the 9 countries not listed in the table (CZ, GR, HU, LV, LT, MT, PL, SK and SL) figures are not yet available as Fair Trade is just about to start there. See the respective country chapter for more details



## G: NUMBER OF LICENSEES (OCTOBER 2005)

### NOTES

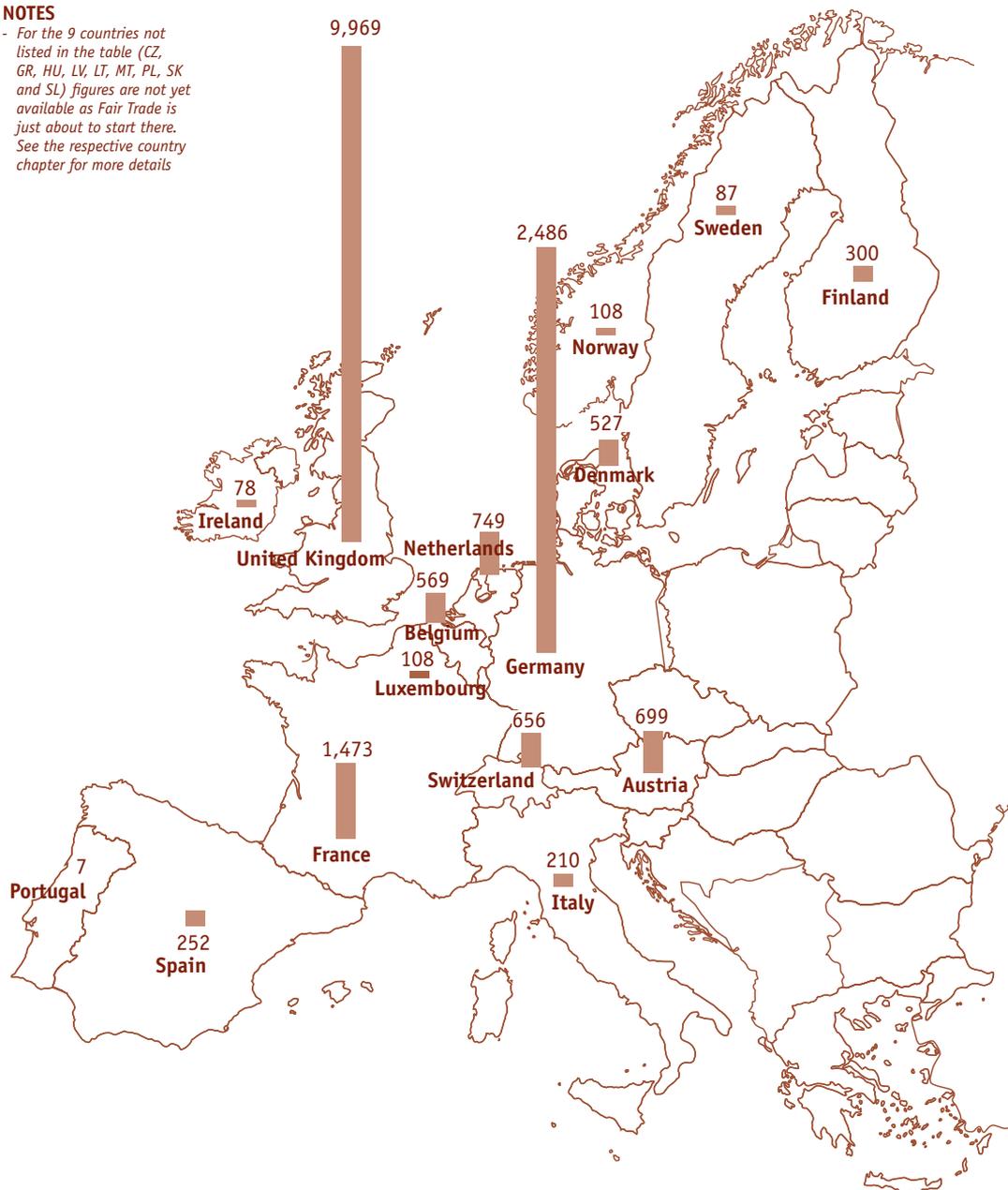
- Italy: not available
- Portugal: not applicable
- For the 9 countries not listed in the table (CZ, GR, HU, LV, LT, MT, PL, SK and SL) figures are not yet available as Fair Trade is just about to start there. See the respective country chapter for more details



## H: EXPENDITURES ON PR, EDUCATION AND MARKETING IN 000 € (OCTOBER 2005)

### NOTES

- For the 9 countries not listed in the table (CZ, GR, HU, LV, LT, MT, PL, SK and SL) figures are not yet available as Fair Trade is just about to start there. See the respective country chapter for more details





**PART ONE**

**Facts and Figures  
on Fair Trade in Europe**

# 1. SCOPE OF THE SURVEY AND METHODOLOGY

## 1.1. WHAT IS THE OBJECTIVE OF THIS STUDY?

The objective of the survey is to provide a comprehensive up-to-date overview of the extent, the structure, the activities and the impact of the Fair Trade movement in Europe (including the effects of Fair Trade labelling initiatives) on the European mainstream market.

## 1.2. WHO IS BEHIND THIS STUDY?

This survey was commissioned by FINE, the informal coordination of the four international Fair Trade networks: Fairtrade Labelling Organizations (FLO), International Fair Trade Association (IFAT), Network of European Worldshops (NEWS!) and European Fair Trade Association (EFTA).<sup>6</sup>

## 1.3. WHICH COUNTRIES ARE COVERED BY THIS STUDY?

This survey, the fourth of its kind, covers 25 countries compared with 18 countries in 2001<sup>7</sup>, 16 in 1998 and 14 countries in 1995.

Countries included are all those 23 EU member countries where Fair Trade activities can be found (i.e. the 25 member states minus Cyprus and Estonia) plus Norway and Switzerland.

The Czech Republic, Hungary, Latvia, Lithuania, Poland, Slovakia and Slovenia appear for the first time.

## 1.4. WHAT KIND OF ACTIVITIES ARE CONCERNED BY THIS STUDY?

Because Fair Trade began as a decentralized movement, it is inevitable that for many years there has been a variety of definitions of Fair Trade around.

A first definition that was shared by all the main players was adopted in April 1999 at the FINE level, i.e. between the four most important international Fair Trade networks.

This first definition of Fair Trade was fully revised and agreed upon in October 2001.

## 1.5. WHICH CATEGORIES OF PRODUCTS ARE CONCERNED BY THIS STUDY?

This report concentrates on two categories of products:

- Goods imported and sold by Fair Trade organisations members of the FINE networks (mainly importing organisations and Worldshops) according to Fair Trade criteria, sourced mainly from small-scale producers.
- Goods imported and sold commercially with the Fairtrade label, indicating that the conditions of trade for these products have been certified by an independent organisation as meeting their criteria and standards.

The research does not include wholesalers and retailers whose claim to trade fairly cannot be substantiated through a guarantee or independent monitoring or certification scheme.

## 1.6. HOW WAS THIS SURVEY CONDUCTED?

A separate questionnaire was developed for each of the four different types of organisations:

- the importing organisations;
- the national Worldshops associations;
- the labelling organisations;
- the international networks themselves.

The organisations were identified and contacted via the membership lists of the four international Fair Trade networks working in Europe, namely FLO, IFAT, NEWS! and EFTA. In countries with sparse contacts, some private persons were contacted along the institutional contacts to help with identifying other or new potentially relevant organisations.

The questionnaires were sent via e-mail to a total of 126 organisations and persons at the end of March 2005.

75 questionnaires out of the 126 were finally returned<sup>8</sup>. One reason for the relatively low turnout and the slow response might be the high workload on most people involved in Fair Trade as well as the ever-growing number of studies, researches, questionnaires, etc. in which the Fair Trade organisations are asked to cooperate.

The organisations which returned the questionnaire are all listed in Annex 1. The returned questionnaires represent 35 importing organisations<sup>9</sup>, 13 Worldshops associations, 13 labelling organisations<sup>10</sup> and 4 international networks, as well as 10 organisations and private persons from the new EU-member countries.

Basic facts and figures are presented in a table for each of the country chapters. A condensed overview of this information is presented in Table 1 (see executive summary), and a more detailed summary table is available as Annex 2.

Data contained in this survey generally reflect the situation in the different countries as per summer 2005.

## Definition of Fair Trade:

Fair Trade is a trading partnership, based on dialogue, transparency and respect, that seeks greater equity in international trade. It contributes to sustainable development by offering better trading conditions to, and securing the rights of, marginalised producers and workers – especially in the South. Fair Trade organisations (backed by consumers) are actively engaged in supporting producers, in awareness raising and in campaigning for changes in the rules and practices of conventional international trade.

## The essence of Fair Trade

Fair Trade's strategic intent is:

- deliberately to work with marginalised producers and workers in order to help them move from a position of vulnerability to security and economic self-sufficiency;
- to empower producers and workers as stakeholders in their own organisations;
- actively to play a wider role in the global arena to achieve greater equity in international trade.

FINE, October 2001

<sup>6</sup> See below for more details

<sup>7</sup> In comparison with figures from the 2001 edition (they mostly referred to the years 1999 or 2000) it will read "five years ago"; the 2001 edition was prepared by Jean-Marie Krier on behalf of EFTA – the European Fair Trade Association – under the title "Fair Trade in Europe 2001. Facts and Figures on the Fair Trade sector in 18 European countries"; the previous editions can all be downloaded from EFTA's website [www.eftafairtrade.org](http://www.eftafairtrade.org)

<sup>8</sup> Five years ago this figure was 59 out of 76

<sup>9</sup> Although Ctm altromercato from Italy and claro fair trade from Switzerland are importers and Worldshops associations at the same time, they have been counted as importers only

<sup>10</sup> The only one missing out was Fairtrade-TransFair Italy

## 2. FAIR TRADE STRUCTURES IN EUROPE

### 2.1. FAIR TRADE ORGANISATIONS

There are four types of established Fair Trade organisations, which all assume different roles within the trading chain from producers in the South to consumers in the North.

**Producer organisations** cultivate or produce a wide variety of marketable products (food products like coffee, cocoa, tea, fresh and dried fruit, spices, etc. as well as a wide variety of handicrafts including baskets, glassware, jewellery, musical instruments, toys, etc.) and export them to the consumer countries. The producers are at the very heart of the Fair Trade system.

**Fair Trade importing organisations** buy products from producer organisations at a “fair price”<sup>11</sup>. In their respective home countries the importing organisations operate as wholesalers or retailers, or sometimes as a combination of both.

Importing organisations assist their producer partners in many different ways: they advise them on product development; they help them with skill and management training or offer them additional support in difficult economic and social conditions.

In their home markets they sell the products through a wide variety of different channels: often through specialist shops (“Worldshops”) and local groups or representatives. Many of them also use other channels such as commercial stores, organic or whole food shops, gift shops, supermarkets, mail order catalogues, or internet-based online shops. Some are also active in the catering market.

They initiate or participate in campaigns aimed at raising consumer awareness on North-South issues. They promote Fair Trade as an alternative to the unfair practices of international trade and lobby for change at the political level. For this advocacy work they link up with a wide variety of organisations working on related issues (development NGOs, aid agencies, education centres etc.).

**Worldshops** are specialist shops for Fair Trade products. They sell Fair Trade products to consumers, but they also organise informative and educational Fair Trade promotional activities for the public. They en-

courage their customers to join campaigns on North-South issues and to lobby their local and/or national decision-makers.

Worldshops are run mainly by locally based associations of dedicated people. Although they generally organise their activities in a business-like way, they take pride in the fact that they are “not-for-profit” organisations. In most Worldshops, volunteers do most of the work.

In most countries the Worldshops have formed national associations to facilitate regular cooperation and communication. Many of the shops are supported in a variety of ways by local solidarity groups.

**Fairtrade labelling initiatives:** the success of Fair Trade in recent years can be attributed to the developments which have taken place within Fairtrade labelling, allowing many commercial companies to become new Fair Trade partners.

The first Fairtrade labelling scheme was developed under the name “Max Havelaar” in the Netherlands in 1988. This example has since been followed in many other countries, mainly throughout Europe and North America. Today there are 20 national labelling initiatives around the world (the latest initiatives being in Mexico and Spain) responsible for promoting and licensing the Fairtrade label in their respective countries. The Fairtrade label guarantees that a particular product conforms to Fair Trade standards and contributes to the development of disadvantaged producers and workers.

The initiatives are known, amongst others as Max Havelaar, TransFair and the Fairtrade Mark. These initiatives are generally developed and sustained by broad coalitions of concerned organisations (developmental or environmental NGOs, church organisations, trade unions, consumer organisations etc) who commit themselves to introducing labelled products into mainstream sales outlets such as supermarkets, the catering business and public institutions.

Under their worldwide umbrella organisation “Fairtrade Labelling Organizations International” (FLO<sup>12</sup>) the national initiatives are continuously extending the Fairtrade labelled product range. This is im-

portant because it creates new opportunities for producers of existing products and it also allows new producers and workers to join the Fair Trade system.

## 2.2. FAIR TRADE RELATED ORGANISATIONS

Apart from the organisations mentioned previously, there are many others which also have links with Fair Trade:

- STEP and Rugmark are two specialist labelling organisations dealing with labour conditions in the worldwide carpet industry. Although they have a single-product focus only, they largely share the same beliefs and make use of the same instruments as the Fair Trade labelling organisations in order to convey their message. The Flower Label Program (FLP) also falls within the same category.
- Organisations which aim to help producers to meet European market requirements through providing consultancy services, help with product development and skills training etc. They may be part of a traditional Fair Trade organisation or be a separate legal entity, for example Traidcraft Exchange for Traidcraft plc in the United Kingdom.
- NGOs directing some of their awareness-raising activities towards responsible consumerism or fairer trade rules and practices between the North and the South. The internationally active “Clean Clothes Campaign” is one example, working towards improving labour conditions and empowering workers in the global garment and sportswear industry.

Many of these organisations are in such close collaboration with Fair Trade that they have recently opted to become members of IFAT, the International Fair Trade Association.

Last but not least, it is worthwhile mentioning that the extraordinary growth of the established Fair Trade sector would not have been possible without the adequate means to finance this growth.

Financing organisations with a relatively strong commitment to Fair Trade such as Triodos Bank,

Oikocredit and Shared Interest have all proved very helpful in this context.

**Triodos Bank**, with its headquarters in Zeist in the Netherlands, is a pioneering force in the world of sustainable banking and has offices in the Netherlands, Belgium, the United Kingdom and Spain.

The bank provides transaction-based finance to Fair Trade or organic producer organisations in developing countries or Central and Eastern Europe. The aim is to enable them to export their products directly and at a fair price. The volume of credits given is based on a certain percentage of the export contracts of, for example, coffee, tea or other Fair Trade products. Organisations wishing to apply for trading finance need to be registered with FLO or need to be engaged in certified organic production.

**Oikocredit’s** funding consists primarily of sharecapital (€226m December 2005) provided by a network of 600 institutional and 23,000 individual investors from all over the world. Based on Oikocredit’s international network of 11 regional offices, 18 country offices and the headquarters in the Netherlands, Oikocredit provides different types of financing to cooperatives and finance institutions as well as to small and medium-sized enterprises.

During the UN Year of Microcredit 2005, Oikocredit attracted special attention at international level, being the world’s largest source of private finance within the micro-financing sector, with an active investment portfolio of more than €160 million of which €107 million outstanding (December 2005) in micro-finance institutions in Africa, Asia and Latin America. This enables local partner organisations to provide the economically poor with micro-loans so that they can create their own jobs and income.

Oikocredit is also actively involved in Fair Trade financing. In December 2005, Oikocredit had €11.2m of outstanding credits provided to either Fair Trade

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<sup>11</sup> Fair Trade producers receive a “fair price” for their products. This price is mutually agreed between Fair Trade producers and buyers with the objective of providing a living wage and of covering the costs of sustainable production (all production costs are taken into account). For the Fairtrade labelled products, this also implies the setting of a minimum price.

<sup>12</sup> See below for details

producer organisations in the South or importers/wholesalers. This represented some 5% of the organisation's total loan portfolio.

**Shared Interest**, based in Newcastle Upon Tyne in the United Kingdom, is a specialist in Fair Trade financing. It has over 8,000 members and a total share value of more than €30m. Its sole aim is to provide credit to Fair Trade organisations through its Clearing House and through providing loans.

Membership of the Clearing House is open to both buyer and producer members of IFAT and producers certified by FLO. In 2004 Shared Interest had 365 producer organisations receiving payments worth a total value of over €28.5m.

### 2.3. FAIR TRADE'S COMMERCIAL PARTNERS

The labelling schemes have attracted many commercial companies to Fair Trade. Aided by the guidance and services of the national labelling initiatives as well as by FLO-Cert, the international certification body, these schemes have become one of the main driving forces behind the enormous growth of the past five years.

Some of them, like the Co-op chains in the UK, Switzerland and Italy, have been making impressive efforts to expand the Fair Trade market. In many cases these new commercial partners have invested vast amounts of time and money in promoting Fair Trade, often with a great deal of success and consequently bringing enormous benefits to producers.

There are now approximately 500 commercial exporters, importers, processors and distributors registered with FLO-Cert and a further 500 licensees of the national initiatives brought to Fair Trade via the labelling scheme. Many of the big European distributors and supermarket chains such as Auchan, Casino, Cora, Monoprix and Leclerc in France and Metro, Rewe, Edeka, Spar/Eurospar, Karstadt/Hertie, Kaiser's Tengelmann in Germany, are now Fair Trade commercial partners.

In many cases, market success would not have been possible without specific companies moving in to bridge the gap between Fair Trade producers and supermarket customers. Companies like AlterEco (in France), AgroFair (in the Netherlands), CaféDirect

and the Day Chocolate Company (both from the UK) have been highly successful at bridging this gap.

An interesting new development, where commercial partners start switching their whole product line to meet Fair Trade standards can be seen in markets where the Fairtrade labelled product range is already well developed. In Switzerland for example, Co-op, one of the two big players in the Swiss retail food market, has decided to sell all of its bananas under the Max Havelaar label. In the UK the Co-op Group supermarkets have switched a 100% of their chocolate range to Fair Trade; Marks & Spencer's in-store cafés sell 100% Fair Trade coffee, as does the AMT chain of over 35 coffee bars.

### 2.4. INTERNATIONAL FAIR TRADE ORGANISATIONS IN EUROPE

Four multinational Fair Trade organisations are currently active in Europe:

**IFAT (International Fair Trade Association)**<sup>13</sup> was established in 1989. It is a global association of nearly 300 organizations in over 60 countries, who have the concept of Fair Trade at the heart of their mission and at the core of what they do. Members are producer co-operatives and associations, export marketing companies, importers, retailers, national and regional Fair Trade networks and Fair Trade Support Organisations.

Approximately 65% of the members are based in the South (in Asia, Africa and Latin America) with the rest coming from Europe, North America, Japan, Australia and New Zealand.

IFAT's mission is to improve the livelihoods and well being of disadvantaged producers by linking and promoting Fair Trade Organizations and speaking out for greater justice in world trade. IFAT's core fields of activities are:

- *Developing the market for Fair Trade.* It does so by providing information on market opportunities to members, organizing workshops and acting as an information point. On the IFAT website and in the Catgen (Catalogue of Catalogues) on line database, buyers can look for Fair Trade producers and products. IFAT members also jointly participate in international trade fairs.

- *Building trust in Fair Trade.* In order to build trust in Fair Trade, IFAT operates a 3 tier monitoring system consisting of self-assessment, mutual review and external verification. This system is accessible, participatory and cost effective. Members who have successfully completed their self-assessment can use the FTO Mark (the "Verification of true Fair Trade Organizations").
- *Speaking out for Fair Trade.* With the "Global Journey" a banner showing the FTO Mark is being carried around the world to spread the Fair Trade message and to call for greater equity in international trade. Setting off in January 2004 from one of the poorest districts in Mumbai (India), the Global Journey passed through Asia, Latin America, North America and Canada and is continuing its journey through Africa and Europe.
- *Providing networking opportunities* through organizing a global conference every two years (in 2005 it took place in Quito, Ecuador), as well as regional conferences in the years in between.
- *Empowering the regions.* The 3 Southern regions have a formal legal status and secretariat: AFTF (Asia Fair Trade Forum), COFTA (Cooperation for Fair Trade in Africa) and Asociación Latinoamericana de Comercio Justo.

**EFTA (European Fair Trade Association)**, established in 1987, is an association of 11 importing organisations in 9 European countries.

The aim of EFTA is to support its member organisations in their work, encouraging them to cooperate and coordinate. It facilitates the exchange of information and networking, it enables the division of labour and it identifies and develops joint projects. It does this by organizing meetings between members (on food, handicrafts, marketing, management) and by circulating relevant information to them.

It also maintains a database of EFTA suppliers called Fairdata. EFTA has an office in Brussels which is responsible for the execution of the Fair Procura project, co-financed by the European Commission. The aim of this project is to make public authorities and institutional buyers locally active within the sustainable development framework.

**NEWS! (Network of European Worldshops)**, established in 1994, is a network of 15 national associations of Worldshops, representing about 2,400 shops in thirteen countries. Italy and Switzerland both have two member organisations in NEWS!

The network facilitates cooperation and networking between its members by providing information (NEWSletter, website, workshops, etc.) and by organising a bi-annual European Worldshops conference. It develops and coordinates European-wide campaign activities and provides members with the materials needed to participate. The newest campaign under the title "Stand Up for Their Rights!" is about exploitative child labour and runs from May 2005 to July 2007. Worldshops in 11 European countries are participating in this campaign.

**FLO (Fairtrade Labelling Organizations International)**, established in 1997, is a network of 20 national label initiatives. Fairtrade labelling organisations exist in 15 European countries as well as in Canada, the United States, Mexico, Japan and Australia/New Zealand.

FLO is one of the biggest international certification organisations that focus on social and environmental issues. It regularly inspects and certifies about 420 producer organisations in 50 countries in Africa, Asia and Latin America, encompassing approximately 800,000 families of farmers and workers.

FLO is made up of two organisations:

- FLO e.V. is a multi-stakeholder association involving FLO's 20 member organisations (or "National Initiatives"), producer organisations, traders and external experts. It develops and reviews standards and assists producers in gaining and maintaining certification in order to capitalize on market opportunities.
- FLO-Cert works with over 60 trained local inspectors. FLO-Cert co-ordinates all tasks and processes all information related to the inspection of producers, trade auditing and certification. Operating independently from any other Fair Trade interests,

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13 Initially IFAT stood for "International Federation for Alternative Trade"

it follows the ISO Standards for Certification Bodies (ISO 65).

For historical reasons, Fairtrade labelling schemes have been operating under different names (such as Max Havelaar, TransFair or Fairtrade Mark) and different certification marks for many years. In 2003 the same label was adopted by all FLO National Initiatives (except Switzerland), and in many countries the "Fairtrade" entitled label is already complementing or even replacing the original name of the label. In Austria, even the name of the organisation was changed from TransFair Austria to FAIRTRADE Austria.

Since 1996, cooperation between these four international networks has developed considerably. Under the acronym of **FINE** (standing for the first letters of FLO, IFAT, NEWS! and EFTA respectively) representatives hold regular meetings to coordinate their work. FINE is particularly involved in developing an integrated monitoring system for the whole Fair Trade movement and in advocacy work at the international level.

Since April 2004 FINE runs the **Fair Trade Advocacy Office** in Brussels. Its role is to co-ordinate the advocacy activities of the international Fair Trade movement at both the European and the international levels. The aim of the office is to step up public support for Fair Trade and to speak out for trade justice.

## 2.5. COOPERATION IN EUROPE

Fair Trade has taken up the challenge of European integration and is improving cooperation within Europe. Regular meetings at the European level, between and within the four international networks, help to foster a European approach to Fair Trade activities and commitments.

In the last few years Fair Trade has expanded into new countries, mainly in the eastern part of Europe. The EU co-financed project "NEWS goes East!" co-ordinated by NEWS! is one of the main focuses of this expansion.

The overall aim of the project, which started in August 2004, is to help organisations in the new EU Member States<sup>14</sup> develop their own Fair Trade structures and strategies. This is being done through an exchange of experience and expertise between long-standing Fair Traders in the West and engaged church organisations, environmental or development NGOs and voluntary organisations in the new member countries. Activities include the organisation of seminars, the publication of a "Best practice handbook", the setting up of a contact database and the provision of internship opportunities in Fair Trade organisations for interested people. In summer 2005 a new website was launched ([www.newsgoeseast.org](http://www.newsgoeseast.org)) to make the details of the project available to as broad a public as possible.

**Table 2: International Fair Trade organisations in Europe (Summer 2005)**

	FLO	IFAT	NEWS!	EFTA
<b>Established</b>	1997	1989	1994	1987
<b>Type of members</b>	National labelling organisations	Producer org., importing org., others	National Worldshops associations	Importing organisations
<b>Members In countries</b>	20 in 20 countries	280 in 62 countries	15 in 13 countries	11 in 9 countries
<b>Members In Europe</b>	15 in 15 countries	63 in 12 countries	All	All
<b>Head office</b>	Bonn, Germany	Culemborg, The Netherlands	Mainz, Germany	Maastricht, The Netherlands

The European perspective has become vital for the political activities and the further development of Fair Trade organisations.

A perfect example of this growing cooperation is the European Worldshops Day. Since it began in 1996, the European Worldshops Day has become a major highlight of Fair Trade activity within Europe (and even outside Europe). Most of the Worldshops and many importing organisations, from Ireland to Austria and from Northern Sweden to Sicily, have come together in order to participate in common activities, which have successfully resulted in increasing public awareness over the years.

In recent years this idea was transferred to a global level by IFAT. Since 2002, the “World Fair Trade Day” is celebrated each year on the second weekend in May (see [www.wftday.org](http://www.wftday.org)).

Fair Trade organisations have realised that in order to be effective in the political field, they need to relate activities at national level to centralised activities at the European level. Since its establishment in April 2004, the **Fair Trade Advocacy Office** in Brussels has played a crucial role in promoting Fair Trade to the European institutions, in speaking out for trade justice and in supporting national advocacy activities.

Although European policy-makers have repeatedly recognized Fair Trade as an important tool for sustainable development, poverty eradication and consumer awareness<sup>15</sup>, there is no EU-wide policy on Fair Trade as of yet. In order to develop this type of policy, the international Fair Trade movement presented its demands to European decision makers in May 2005 and has since been lobbying for a public recognition of Fair Trade and Fair Trade organisations, for a co-ordination of Fair Trade related activities among the relevant services in the European Commission and for fair purchasing policies.

Members of the European Parliament set up a working group on Fair Trade in late 2004 and organised several events (including an exhibition, a conference and a Fair Trade reception) in the European Parliament in cooperation with the Fair Trade Advocacy Office. In July 2005 a petition requesting increased availability and visibility of Fair Trade in the European Parliament buildings was signed by more than 400 Members of the European Parliament, their assistants and other European Parliament staff.

One of the great successes is that the international Fair Trade movement is now speaking with one voice to European and international decision makers. For the first time, a joint Fair Trade position on WTO negotiations was presented to the World Trade Organisation’s 6<sup>th</sup> Ministerial Conference in Hong Kong (December 2005). Other joint positions and declarations were established for the reform of the EU sugar regime (March 2005) and for the meeting of the United Nations Conference on Development in São Paulo (UNCTAD XI, June 2004).

Despite the growing cooperation at European and international levels, the Fair Trade movement continues to be characterised by a wide diversity of style, organisation, activity and focus. A major challenge for Fair Trade in the years to come will be to integrate and implement this diversity into a strong strategy at the international level.

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<sup>14</sup> The project does not include Cyprus and Malta and thus covers only 8 of the 10 new EU Member States.

<sup>15</sup> Relevant documents include the European Parliament Resolution on Fair Trade, OJ C 226/73, 20.07.1998; the EC Communication on “Fair Trade”, COM(1999) 619 final, 29.11.1999; and the reference to Fair Trade in many EU official documents, such as the EC Communication “Policy Coherence for Development – Accelerating progress towards attaining the Millennium Development Goals”, COM(2005) 134 final, 12.04.2005; the Cotonou Agreement, Art.23 and the Compendium, the EU Commodities Action Plan, COM(2004) 89 final, etc.

## 3. FAIR TRADE MARKET DEVELOPMENTS IN EUROPE

### 3.1. FAIR TRADE IMPORTERS

In the 25 countries dealt with in this survey, about 200 **importing organisations** are involved in the Fair Trade market. They range from very small organisations, sometimes run by just one or two dedicated people to the largest full-range<sup>16</sup> Fair Trade importers in the world i.e. gepa in Germany and Ctm altromercato in Italy.

The importing organisations that responded to the survey's questionnaire account for an aggregate net turnover of over €229m excluding VAT.

Some €14 million or more are made by organisations which have not contributed to this survey, but are nevertheless too important not to take their turnover into account when analysing national situations, e.g. Eine-Welt-Handel in Austria, EL PUENTE in Germany and Oxfam-Magasins du monde in Belgium. Altogether these organisations represent an overall net turnover of about €243m per annum.

Seven of the largest importing organisations have an annual turnover exceeding €10m. Taken together they have seen their sales figures increase in five years from just over €92m to more than €167m in 2004, i.e. an increase of 80%.

Most of the bigger importing organisations are members of EFTA, the European Fair Trade Association. Taken together the organisation's 11 members represent a net turnover of about €169m compared to approximately €100m for 12 organisations five years ago<sup>23</sup>. This turnover translates into a total retail value of €196m for all goods sold by the EFTA members during their financial year 2004.

### 3.2. FAIR TRADE RETAILERS

Fair Trade products reach the end consumer in many ways but most significantly through the Worldshops and the supermarkets.

There are about **2,800 Worldshops** in Europe, out of which nearly 2,400 are organised within NEWS! Compared with the situation five years ago, this number has not changed. The decrease of British Worldshops due to the restructuring of Oxfam shops in the UK was more than compensated by the growth in the number of Worldshops in many other countries<sup>24</sup>.

The overall retail value of sales through Worldshops reaches approximately €103m. Figures were provided by 14 countries accounting for 2,354 shops. The average turnover per shop is thus €43,800. However, there are large variations in turnover between countries and even within countries. Bigger shops can reach a turnover of €121,000 compared to an aver-

**Table 3: The Top European Fair Trade importers**

Turnover of the biggest Fair Trade importers in Europe (in million EUR)			
Organisation <sup>17</sup>	Country	Turnover financial year 2004 <sup>18</sup>	Turnover five years ago <sup>19</sup>
gepa	Germany	39.7	29.8
Ctm altromercato	Italy	34.3 <sup>20</sup>	9.3
Cafédirect	United Kingdom	25.2	12.0
Fair Trade Organisatie	Netherlands	20.7	15.9
Traidcraft	United Kingdom	20.6 <sup>21</sup>	12.4
Oxfam Fairtrade <sup>22</sup>	Belgium	15.5	5.0
claro fair trade	Switzerland	11.5	8.3

**Table 4: The impact of the Fairtrade labelling organisations in Europe**

Figures for 2004 <sup>28</sup>		
	net retail value in 000€	per capita in euros
United Kingdom	206,289	3.46
Switzerland	136,028	18.47
France	69,000	1.15
Germany	58,000	0.70
The Netherlands	35,000	2.15
Belgium	20,000	1.92
Italy	20,000	0.35
Austria	15,781	1.94
Denmark	12,000	2.22
Finland	7,700	1.48
Sweden	5,480	0.61
Ireland	5,000	1.24
Norway	4,540	0.99
Luxembourg	2,000	4.43
TOTAL	596,818	1.51

age of €13,000 for the smallest shops in French-speaking Belgium<sup>25</sup>.

In top locations in big cities, Worldshops can easily receive an annual turnover of €250,000 or more<sup>26</sup>.

Assuming that the remaining 500 shops in Europe attain 80% of the calculated average (just to be on the cautious side), we arrive at an estimated total net retail value of over €120m for all European Worldshops<sup>27</sup>.

Thanks to the Fair Trade labelling schemes, Fair Trade products are now available in about **57,000 supermarkets** throughout Europe.

Other retail channels are local solidarity groups, organic food shops, whole food shops, independent commercial stores and institutional clients such as schools or local administrative organisations. They represent about another **20,000 selling points** where Fair Trade products are directly available for consumption.

The development of the Internet has opened up new ways of delivering products to consumers and many organisations have put into place user-friendly online shopping facilities or sophisticated business-to-business order systems.

### 3.3. FAIRTRADE LABELLING

Since 1988 the market for Fair Trade products in Europe has changed considerably. There are now labelling initiatives in 15 European countries, including the latest newcomer Spain. These have been instrumental in extending the market for Fair Trade by introducing the Fair Trade concept to supermarkets and other commercial outlets.

More complete information is available for the sales of Fairtrade labelled products than for non-labelled products. The total for **products sold under Fairtrade labels** in 14 countries is **about €597m**. The average per capita consumption per year of Fair Trade

16 i.e. an organisation importing both a great variety of handicrafts and food products

17 See the country chapters for more details on the different organisations

18 2004 figures relate to the financial year ending in the period from 1 July 2004 up to 30 June 2005

19 As presented in the "Fair Trade in Europe 2001" edition

20 This figure relates to the 2003 financial year

21 Idem

22 Oxfam Fairtrade, Belgium; 2001 figures are from Oxfam-Wereldwinkels

23 Oxfam GB has left; see also country chapter on UK

24 Up until this point, a large proportion of the Oxfam shops were heavily involved in Fair Trade and could easily be considered as Worldshops. However, this has now changed. Today Oxfam GB runs a network of about 700 shops in the UK, with a very strong focus on reselling second hand products. Some 450 of them continue to sell Fair Trade products, but only a certain range.

25 These are the 2004 figures for the so-called MM+ and MM4 shops respectively

26 Examples are the shops in the Citypark shopping mall in Graz, Austria, or the one near St. Stephen's Cathedral in Vienna, Austria

27 80% of 43,800 gives 35,000 multiplied by 500 shops is €17.5m that have to be added to €103m

28 The figure for TransFair-Italy is from 2003

products for these countries is €1.51, with huge variations between a minimum level of consumption in Italy (€0.35) and the maximum level of €18.47 in Switzerland. In the following table, Luxembourg ranks second and the United Kingdom third.

In countries where Fairtrade labelling organisations are active, market research surveys are used regularly to assess market potential and to evaluate market performance.

In general, knowledge of the Fairtrade label seems to be steadily increasing, in certain cases reaching a level of awareness that would not have been imaginable a few years ago.

For instance, surveys done in 2005 showed that 74% of the French population seem to understand the Fair Trade concept, and that 50% of the adult population in the UK recognise the Fairtrade Mark.

In general, higher percentages of public awareness usually reflect the maturity of the Fair Trade market in a particular country.

Ultimately, the impact of labelling can only be measured by the market share achieved for a particular product. Most figures still fall far short of the supposed market potential and thus reflect one of the future challenges for Fair Trade: to really become mainstream.

Top performers like Max Havelaar in Switzerland and the Fairtrade Foundation in the UK are not only highly successful in penetrating the coffee and banana market but have also achieved the highest market penetration of Fair Trade products in mainstream retailing in other product ranges too. Their success demonstrates the potential for Fair Trade in other European countries.

**Table 5: Market shares of Fairtrade labelled coffee<sup>29</sup> and bananas in 14 European countries**

Figures for 2004

Coffee	latest year available	five years ago <sup>30</sup>	Bananas	latest year available	five years ago
United Kingdom	20.0	1.5	Switzerland	47.0	15.0
Switzerland	6.0	3.0	United Kingdom	5.5	< 1.0
Austria	2.3	0.7	Finland	5.0	n/a
Denmark	2.0	1.8	Belgium	4.0	0.6
Ireland	2.0	0.5	Austria	2.7	n/a
Belgium	1.7	1.0	Sweden	< 1.0	1.8
Germany	1.0	1.0	Denmark	0.9	2.0
Sweden	< 1.0	0.8	Norway	0.6	n/a
Norway	0.9	0.3	Ireland	0.5	n/a
Finland	0.4	0.3	The Netherlands	n/a	4.2
Luxembourg	n/a	3.3	Luxembourg	n/a	4.0
The Netherlands	n/a	2.7	Italy	n/a	1.2
Italy	n/a	0.1	Germany	n/a	< 1.0
France	n/a	0.1	France	n/a	n/a

**Table 6: Market shares of top performing labelling organisations**

Figures for 2004						
Market share in %	Bananas	Coffee	Flowers	Honey	Sugar	Tea
Switzerland	47.0	6.0	28.0	14.0	9.0	5.0
United Kingdom	5.5	20.0	n/a	n/a	n/a	5.0

It is clear that this impressive market success has started to concern some of the global players, who are losing market shares to their Fair Trade competitors. Many, such as McDonalds, Dole, Chiquita and Nestlé are exploring ways of how to satisfy the ever increasing demand for products that are made under ethical and sustainable conditions. Some of them have chosen to work with Fairtrade labelling while others are developing alternative schemes with lower standards.

**3.4. AWARENESS RAISING AND CAMPAIGNING**

Fair Trade would not be what it is without its incredible variety of awareness-raising and campaigning activities on behalf of excluded and disadvantaged producers. More than €18.3m is spent annually on education, public relations and marketing (€11.4m by importing organisations, €1.7m by Worldshops associations, and €5.1m by labelling initiatives)<sup>31</sup>, the biggest share being spent by Fair Trade organisations in the United Kingdom.

The Oxfam organisations in Belgium staged 300 different activities around the “Fair Play? Fair Pay! - Olympic campaign for labour rights” in 2004. The campaign culminated in a big party in Brussels to celebrate 40 years of Oxfam in Belgium.

The Italian Ctm altromercato launched a campaign on banana workers’ rights in May 2005.

The aim is to inform the public about the denial of worker and consumer rights, the environmental costs of the conventional banana market and on possible ways to change this<sup>32</sup>.

Within the last ten years, Fair Trade campaigning activities have gone beyond the national level. One initiative is often duplicated in several countries (for example the Fair Trade Town scheme which operates in the UK, Ireland and Belgium) or the Fair Trade weeks/fortnights which are now organised on an annual basis in France, the UK, Ireland and Germany, to name but a few. In some cases many organisations also join forces to work together on a common issue. This is regularly the case in the international campaigns coordinated by NEWS!. It also applies to the “Make Trade Fair” campaign strongly supported by Oxfam organisations all over the world, some of them being also important Fair Trade players, like in Belgium and in Spain.

**3.5. FIVE YEARS OF FAIR TRADE DYNAMICS IN EUROPE: A STATISTICAL OVERVIEW**

The substantial growth of the Fair Trade sector has also had a positive effect on job creation within this field. Today importing organisations, Worldshop associations and labelling organisations together offer more than 1,070 full-time paid jobs. Along with an estimated 450 more full-time equivalent jobs in the Worldshops. Fair Trade organisations in Europe provide more than **1,500 job opportunities** for dedicated people wishing to bridge the gap between business thinking and ethical values. In the last five years, 250 new jobs have been created.

<sup>29</sup> Ground coffee only; the market shares for instant coffee are much lower

<sup>30</sup> As presented in the “Fair Trade in Europe 2001” edition

<sup>31</sup> The figures for 2001 were 10.1 for the total and 5.6, 1.0 and 3.5 respectively

<sup>32</sup> Many more examples can be found in the country chapters



Europe in one year? The answer to this question involves several dimensions:

1) The retail value of labelled products provided by the labelling organisations, is reported to be around €597m. Labelling however applies almost exclusively to food products.

2) Non-labelled handcraft products sold through the traditional Fair Trade channels, i.e. mostly through the Worldshops, have to be added to this figure. It is reasonable to estimate the non-food share in an average Worldshop to be at least 50% of total sales<sup>33</sup>. This translates into about €60m of non-food sales through Worldshops in Europe, i.e. 50% of the above €120m of total sales.

The sum of these non-overlapping turnover figures leads to a figure of €657m. This figure is a minimum. It includes neither non-labelled food products sold in Worldshops (for example spices, alcoholic beverages, and other yet-to-be-labelled foods) nor does it take into consideration non-food products sold through channels other than Worldshops.

In conclusion it can be stated with certainty that the annual aggregate net retail value of Fair Trade products (labelled and non-labelled) sold in Europe through alternative channels and supermarkets exceeds **€660m per annum**. Compared with the €260m of five years ago this reflects an increase of 154%<sup>34</sup>.

Nevertheless, most of the work in the traditional Fair Trade sector, especially in Worldshops and solidarity groups is still carried out by volunteers. It is estimated that there are **about 100,000 volunteers** who are actively involved in the Fair Trade sector in Europe, with Germany accounting for half of this volunteer workforce alone, followed by the Netherlands with some 12,000 regular volunteers. In Flanders (Belgium), 1 out of 6000 inhabitants is a Fair Trade volunteer.

In the end it is the everyday choices of consumers which determine the success of Fair Trade. Performance of the Fair Trade market is at this point best measured by the value of Fair Trade products sold to the final consumers.

What is the current **retail value of all Fair Trade products** (both labelled and non-labelled) sold in

<sup>33</sup> For a sample of 756 worldshops from 4 countries where detailed figures are available, the overall average share of handcraft sales is 61.4%; national average percentages vary a lot from 35% in the French-speaking parts of Switzerland up to 75% in the Dutch world shops

<sup>34</sup> See the 2001 edition "Fair Trade in Europe 2001: Facts and Figures on the Fair Trade sector in 18 European countries", p. 21

## 4. THE CHALLENGES AHEAD

Fair Trade came into existence more than four decades ago. But only recently, due to its considerable success in recent years, has it managed to establish a concrete position in the mainstream market. Although this is something to be praised, it also leads to many new challenges.

The situation still varies largely between countries. For Fair Trade «newcomers», like the Eastern European countries or Portugal and Greece, the situation is totally different from that of the mature Fair Trade markets in the Netherlands, Switzerland or the United Kingdom.

And even within the same country the situation can widely differ depending on the way in which it is assessed. For example, the challenges faced by a labelling organisation in a specific country may be perceived in a totally different way by the national Worldshops association in the same country.

It is therefore helpful to rely on data collected at the international level and which is substantiated by data originating from single organisations<sup>35</sup>.

The **Worldshops** represent the longest-standing entities of the Fair Trade setup.

From the available data, the following three challenges are apparent:

- Worldshops need to continue with **programmes to professionalize**. This includes moving to better locations, regulating opening hours, improving the use of a common identity and paying personnel to complement and support volunteers. Examples from different countries show that “going professional” often leads to Worldshop turnovers doubling within a short space of a time. There is still a tremendous potential for growth within the Worldshops which needs to be materialised.
- Worldshops represent the strongest direct link between Fair Trade and consumers. The question of credibility is therefore crucial. It is in the interest of all Worldshops to ensure that they can give their consumers a guarantee that all operations along the supply chain are being carried out according to Fair Trade standards. In a world where an increasing number of competitors are claiming

to practise “Fair Trade”, a **well-balanced monitoring system** will become indispensable.

- A considerable amount of Worldshop customers are not only interested in purchasing attractive, ethical products but rather they perceive the Worldshop as a point of communication and networking from where they can get involved in different campaigns. In some countries, like Belgium or Italy, this dimension is essential to the identity of the Worldshops. It is therefore important that the Worldshops **maintain the political role that they play, as well as operating as a business**. The development of new campaigns at European or worldwide level is therefore of great importance.

For the **labelling organisations** the situation is very different and they seem to be facing the following challenges:

- Most of the labelling organisations have witnessed an extraordinary expansion in recent years. The introduction of new products has occurred in parallel with obtaining new licensees and tapping new market opportunities. As the retail value of products being sold under Fairtrade labels begins (or continues) to soar, it will be important for these organisations to **manage their own growth** in the best possible way, i.e. coping with growing demands from outside, the need for more resources in terms of personnel and finances, the risk of becoming dependent on just a few very big licensees, etc.
- The considerable growth in the Fair Trade market has attracted the big multinationals active in the worldwide food-sourcing sector. As Fair Trade organisations often stem from movements developed in clear and strong opposition to these multinationals like Nestlé or Dole, it will be crucial to **find innovative ways to co-operate with multinationals and still continue to maintain a critical perspective** wherever and whenever they act to the detriment of people and/or the environment. In this context it will also become

<sup>35</sup> All the questionnaires forming the basis of this survey had one question dealing with the challenges ahead

necessary to develop strong and clear positions on competing ethical schemes.

- The setting up of the labelling organisations has made it necessary to cast long-standing practice of Fair Trade organisations into clearly defined regulations and standards. This has naturally attracted institutions and bodies involved in standard setting procedures. It will be important for Fair Trade to find a **good balance between the desired need for standardization and the potentially dangerous tendencies towards over-regulation** from official bodies.

The **importing organisations** are in general located between competing interests, starting from the needs and wishes of producer organisations, the pressure for standardized approaches from the labelling organisations and the never-ending demands of their buyers for new and more attractive products with improved rebate conditions.

Among the challenges for importing organisations the following three may be seen as the most important as far as market-oriented activities are concerned<sup>36</sup>:

- With the increasing attractiveness of the Fair Trade market many new players have entered the scene. Under conditions of growing competition it will become more and more important for importers **to sharpen their individual profile and thus build greater brand and company loyalty.**
- As competition in the supermarket sector will continue to strengthen, importing organisations should develop **new sources for growth outside of the supermarkets.** For example Fair Trade coffee shops or travelling public procurement fairs could be organised, and money could be invested to professionalize the Worldshops.
- Last but not least, the importing organisations, although competing offensively, need **to further strengthen their cooperation.** This may involve joint activities (e.g. in the context of national Fair Trade weeks) or joint ventures (like setting up jointly-owned companies)<sup>37</sup> both at national and international level. Co-operation helps to maintain innovation and in a situation where similar organisations find themselves under different national market conditions, experiences can be shared and consequently large savings can be generated.

An overarching challenge for everyone involved in Fair Trade is presented by the natural ageing of a movement which started in the 1970s and in which many grass roots people of that time continue to be actively involved.

Fair Trade will only survive if it succeeds to **attract younger people** to take over and to further develop what has been achieved so far.

Fortunately some organisations such as the German Worldshop association are already taking up this challenge with its EU co-financed project "The World in a Shop - Worldshops mobilizing youngsters for Fair Trade", jointly undertaken with the Austrian Worldshops association.

Last but not least the author of this study feels that a lot could be gained if Fair Trade was to make positive use of all the research that is currently being done at high schools, universities, research institutes and the like. The **setting up of an international Fair Trade Training and Research Centre**<sup>38</sup> could significantly aid in bridging gaps between theory and practice.

<sup>36</sup> *Producer-oriented activities are not being considered here*

<sup>37</sup> *See information on Twin Trading in the country chapter on the United Kingdom*

<sup>38</sup> *In Austria preliminary steps are already being taken towards setting up a so-called "Fair Trade Academy"*

## PART TWO

# Country studies

Austria – Belgium – Czech Republic –  
Denmark – Finland – France – Germany –  
Greece – Hungary – Ireland – Italy –  
Latvia – Lithuania – Luxembourg – Malta –  
The Netherlands – Norway – Poland –  
Portugal – Slovakia – Slovenia – Spain –  
Sweden – Switzerland – United Kingdom

# AUSTRIA

## THE STRUCTURE OF FAIR TRADE

**EZA Fairer Handel (EZA Fair Trade)**, founded in 1975 with support of the Dutch SOS Wereldhandel (now Fair Trade Organisatie), is by far the largest importing organisation. It accounts for about 75% of the sales of Austrian Worldshops and runs three flagship stores of its own in Salzburg and in Vienna.

In the summer of 2005 EZA moved to a new combined office and central warehouse building approximately 25 kilometres north of Salzburg. In the short time since then the building has already received many awards as a pioneering and highly energy-efficient building. Solar panels, the heat from computer servers and natural body heat from the workers, along with a bio-mass based heating serving as a fallback system under conditions of extreme cold, have replaced the use of fossil fuels.

The second largest organisation is **Eine-Welt-Handel**, which formerly specialised in basket products but in the last few years has considerably diversified their product range once specialized mainly in handicrafts. In the last years they have diversified their range considerably and have now a wide variety of products on offer. In 2001 Eine-Welt-Handel became the first Fair Trade organisation in Austria to be changed into a public company, with some shares being held by producer organisations in India and Bangladesh respectively. They manage a network of 13 franchise shops in Austria and are expanding into the neighbouring part of Southern Germany.

Both organisations arrange trips for workers in the Worldshops to go and visit producer organisations in the South, with follow up educational and promotional work, benefiting the entire Worldshop movement in Austria.

A few more organisations fulfil the Austrian Worldshops association criteria for accreditation of suppliers to Worldshops, among them **CONA** (very active in transferring solar drying technologies to small producer groups to Central America under „CONA solar“), **LiCok** and **dwp mensch + zukunft eG** from Germany.

Austria has 100 Worldshops, of which 87 are members of the **ARGE Weltläden**, the Austrian World-

shops Association. The 13 franchise-bound shops from Eine-Welt-Handel are not yet members of the national association. Since 1995 all member Worldshops have operated under the same name and logo. They also have a common marketing and communication plan and engage in many joint activities all the year round.

Following the implementation of programmes to professionalize the Worldshops during the early nineties, the typical shop now has one paid part-time coordinator working with a group of between 6 and 20 volunteers.

An increasing number of shops, including those in Germany, are switching to a special computer plus software package, developed by the shop in Saalfelden with the support of the shops association<sup>39</sup>.

The association organises three national conferences a year (some with more than 60 shops and 150 people attending), coordinates regional networking between shops, runs training courses, interfaces with the national media, coordinates European Worldshops Day events, etc.

The association has signed contracts of cooperation with the recognized importers, leading to long-term planning security on both sides.

Since 1993 FAIRTRADE Austria (formerly: TransFair Austria) has been involved in bringing Fair Trade products into the supermarkets. With the help of 23 licensees Fairtrade labelled products are today available in more than 3,300 outlets nationwide.

A national Fair Trade Forum was established in 2002 through the initiative of the world shops association. It has 10 members and brings together the most important commercial Austrian players with educational and awareness-raising organisations such as the Clean Clothes Campaign, Südwind or the umbrella organisation of developmental and environmental NGOs named AGEZ.

## THE FAIR TRADE MARKET IN AUSTRIA

The Austrian market has been very dynamic in recent years.

EZA Fairer Handel has doubled its sales between 2000 and 2005, reaching a turnover of €9.5m. Together with Eine-Welt-Handel the two largest importing organisations now have a joint turnover of around €12.6 m (about €6.5m in 2000). The Worldshops organised in the national association represent a net retail value of €7.5m (€4.9m in 2000).

After a few difficult early years, FAIRTRADE with its membership base of 28 organisations has not only been able to catch the attention of the political authorities but has also managed to gain important financial support from government sources. After staging the first national poster campaign as well as showing FAIRTRADE adverts on national television in autumn 2001 the market has begun to expand considerably.

Through these activities it has been possible to extend FAIRTRADE's line of licensees and to broaden the range of products now on offer in supermarkets throughout Austria. The launch of organic bananas in supermarkets has been a great success. Among others, the premium chocolate company Zotter has started producing its whole assortment under Fair Trade conditions, thus introducing the Fair Trade concept to many new consumers in Austria.

Whereas the net retail value of sales of labelled goods was around €3.1m in 2000, it is now in the range of €15.8 m. The market shares of FAIRTRADE labelled products have steadily gone up after 2001 and now lie between 2.1 and 2.3 percent for coffee, tea and bananas respectively.

Many prominent institutions have switched to Fair Trade coffee and tea in recent years. Places where FAIRTRADE labelled products are being served regularly include the Presidential Palace, several provincial governments, the Federation of Austrian Trade Unions, etc.

Pro-Fair Trade resolutions have been passed at many different levels, local, regional and national. There are a significant number of groups working to transform these resolutions into concrete acts of purchasing and procurement.

Fair Trade in Europe 2005	Austria
<b>Importing organisations</b>	6
<b>Points of sale</b>	
Worldshops	100
Supermarkets	2,000
Others	1,250
<b>TOTAL</b>	<b>3,350</b>
<b>Paid staff (in full-time equiv.)</b>	
Importing organisations	38.9
Worldshops association	2.6
Labelling organisation	7.0
<b>TOTAL</b>	<b>48.5</b>
<b>Turnovers, in 000 €</b>	
Importing organisations	12,805
Worldshops	7,460
Retail value labelling org.	15,781
<b>Education / PR / marketing in 000 €</b>	
Importing organisations	232
Worldshops association	142
Labelling organisation	325
<b>TOTAL</b>	<b>699</b>
<b>Name of label</b>	<b>FAIRTRADE</b>
<b>Number of label licensees</b>	<b>23</b>
<b>Market shares, in %</b>	
Labelled coffee	2.3
Labelled tea	2.1
Labelled bananas	2.3

The alliance established between Fair Trade and the Austrian organic farmers movement in 1998 has been growing over the years through many joint activities. Building on this EZA Fairer Handel took the initiative to start a pilot shop concept together with a distributor and a producer of organic products in 2004. In the small organic model village of Seeham outside Salzburg organic and fairly traded products are now being sold together in a shop named "bio+fair".

39 For more information contact Andreas Wenger at [info@wenger-edv.at](mailto:info@wenger-edv.at)

# BELGIUM

## THE STRUCTURE OF FAIR TRADE

In 2003 **Oxfam-Wereldwinkels**, one of the two traditional big players on the Belgian Fair Trade market, chose to establish a strict separation between the educational and lobbying side of Fair Trade on the one hand and the purely business side on the other.

All the importing and wholesaling activities were transferred into a separate subsidiary called **Oxfam Fairtrade**. The organisation concentrates exclusively on food products. The success of this specialization is reflected in the fact that many of its products, like the Equita chocolate range or the Chilean wines, are also well known outside of Belgium. The organisation has achieved tremendous growth in recent years and now employs 39 people.

**Oxfam-Wereldwinkels** remains the political arm of the Flemish Fair Trade setup and focuses its work on three main areas: the importance of being a democratic movement of volunteers (not only as an instrument to help Fair Trade but as an aim in itself), the fight for fair structures in global trade, and the close cooperation and networking with other NGOs fighting for human dignity. Oxfam-Wereldwinkels runs 205 shops in the Flemish-speaking part of Belgium. These shops are operated by 7,100 volunteers and sell food products imported by Oxfam Fairtrade as well as handicrafts imported by Oxfam-Magasins du monde and Fair Trade Organisatie.

**Oxfam-Magasins du monde**, in the French-speaking part of Belgium, describes itself as a democratic and participative educational movement, aiming to lead "Fair Trade actions in solidarity and change actions in favour of a sustainable, social and fair development"<sup>40</sup>.

As far as the business side of its operations is concerned, the organisation has a clear division of tasks with its counterpart in the Flemish part of Belgium, specializing in handicraft products to complement Oxfam Fairtrade's work in the field of food products. Oxfam-Magasins du monde runs nearly 70 Worldshops, involving some 3,000 volunteers. It also operates 65 "Jeunes Magasins du Monde" (young Worldshops), a special scheme incorporating small sales outlets based in schools which are ran by groups of young

secondary school students, each group being supported by two teachers.

The French-speaking Worldshops sell food products imported by Oxfam Fairtrade and handicrafts (including clothes and cosmetics) imported by Oxfam-Magasins du monde and carrying the brand name "Made in dignity".

Smaller importers in Belgium are **Fair Trade Organisatie** in Bierbeek (totalling sales of €1.5m through a staff of 6 people, with 60% of handicrafts and 27% of coffee), **Citizen Dream** and **Maya Fair Trading**. The latter is an organisation concentrating strictly on honey and honey-based products, sourced from Guatemala and Mexico.

**Max Havelaar Belgium**, the national Fairtrade labelling organisation, is backed by a coalition of 23 member organisations and 7 additional partner organisations which provide support in the marketing and financing of the label. With 32 license contracts having been signed, Max Havelaar labelled products can now be found in more than 1,000 supermarkets in Belgium.

Max Havelaar Belgium has recently started labelling cotton products under the brands of La Redoute, Kindy, Influx/Cora and Celio, consequently becoming the second country to do so after France.

In September 2005 the first labelled flowers, namely roses, have hit the Belgian market, following the examples from both the United Kingdom and Switzerland.

Money from the federal government has made it possible to set up a **Fair Trade Centre** in Brussels. While previously acting as a kind of national Fair Trade platform, the Fair Trade Centre is now a special programme of the Belgian Technical Cooperation (the executive agency of the Belgian Development Cooperation). Its aim is to support Fair Trade through, notably, the co-ordination of the Fair Trade Week (taking place every year in October) and the support to product development initiatives. Its role is also to collect and circulate to Belgian actors all relevant information (studies, reports, market developments...) related to Fair Trade.

## THE FAIR TRADE MARKET IN BELGIUM

In 2004 the turnover of Oxfam Fairtrade reached €15.5 m, of which 59% was created through the Worldshops in the Flemish and the Walloon part of Belgium.

Oxfam-Magasins du monde had an aggregate turnover of nearly €4.8m in 2004.

2003 has been the real take-off year for Fairtrade labelled products in Belgium. Max Havelaar-labelled coffee and bananas showed spectacular growth rates and newly introduced products like chocolate, tea, fruit juices, sugar, rice and honey added to the growing general interest in Fair Trade products.

In 2004 different fresh fruit, soft drinks and biscuits were added to the labelled product range. With growth rates of 50% for the bananas and 7% for coffee in 2004, this meant that the total retail value of labelled products reached €20m at the end of the year (compared to €5m in 1999/2000). While Fair Trade coffee accounts for 1.7% of the national market, bananas have been successful in rapidly achieving a market share of roughly 4%.

The general public's awareness of Fair Trade has been steadily rising, increasing from 32% in 2002 to 66% of the population in 2004. This has been attributed, among other explanations, to the annual National Fair Trade Week, involving all major Fair Trade players and with many events (conferences, concerts, product tastings, etc.) being organised all over the country.

The Belgian Oxfams, with their broad network of world shops and supporters, are one of the strongest social movements in Belgium. They are consequently very active in lobbying both the national authorities and the Brussels-based European institutions.

In the last few years they have been involved in actions and campaigns dealing with the worldwide coffee crisis, different WTO-related issues, the working conditions in the sports garment industry (in 2004 they staged an "Olympic campaign for labour rights" under the title "Fair Play? Fair Pay!") and other similar issues.

Fair Trade in Europe 2005	Belgium
<b>Importing organisations</b>	5
<b>Points of sale</b>	
Worldshops	295
Supermarkets	700
Others	50
TOTAL	1,050
<b>Paid staff (in full-time equiv.)</b>	
Importing organisations	44.7
Worldshops association	30.0
Labelling organisation	8.5
TOTAL	83.2
<b>Turnovers, in 000 €</b>	
Importing organisations	17,055
Worldshops	20,000
Retail value labelling org.	15,781
<b>Education / PR / marketing in 000 €</b>	
Importing organisations	200
Worldshops association	81
Labelling organisation	288
TOTAL	569
<b>Name of label</b>	Max Havelaar
<b>Number of label licensees</b>	32
<b>Market shares, in %</b>	
Labelled coffee	1.7
Labelled tea	no
Labelled bananas	4.0

All these political contacts have also contributed to winning the political decision-makers over to the Fair Trade idea. In the meantime a significant number of institutions (for example, the entire administration of both the Flemish Community and of the Walloon Region, the Royal Palace, the administration of the City of Brussels, as well as many other towns) have switched to Fair Trade coffee or tea.

40 From the organisation's strategic plan 2005-2008

# CZECH REPUBLIC

Although Fair Trade is a rather new concept in the Czech Republic, there are already a few organisations that have started to build it up.

**Jeden Svět** (One World) is the organisation behind the oldest Worldshop in Prague at 60 Korunní Street. Besides traditional handicrafts the shop also sells handmade products from local non-profit organisations supporting disabled Czech citizens. Recently the organisation has opened a second shop in Prague at Klimentska Street.

**Ekumenická Akademie** is a wholesale distributor based in Prague and supplies the supermarket chain Carrefour in the Czech Republic and in Slovakia.

The **Society for Fair Trade and Development Education** (Společnost pro Fair Trade a rozvojové vzdělávání) was founded in October 2003. It acts as a wholesaler and a retailer and manages educational and promotional activities as well. It has two active groups, one

in Prague and one in Brno. Both groups manage retail sales points, at Panska 9 in Brno and Senovazne namesti 24, in the capital Prague.

Products are imported from EZA Fairer Handel (Austria), EL PUENTE (Germany) and Commercio Alternativo (Italy).

In summer 2004 the three organisations joined forces to establish a national platform, entitled the **Association for Fair Trade**. It has its offices at the Ecumenical Academy in Prague.

So far the Fair Trade activities seem very promising. A large number of development and environmental NGOs are interested in Fair Trade issues and Fair Trade is increasingly being publicised in the media, serving to widen public awareness of and interest in Fair Trade.

The drivers behind the Fair Trade movement believe that there is a growing potential for other towns to have local active groups promoting Fair Trade.

# DENMARK

## THE STRUCTURE OF FAIR TRADE

Until recently there were two importers of Fair Trade products in Denmark. Following the dissolution of Fair Trade Import in summer 2005, the only remaining organisation is Fair Trade Gruppen.

**Fair Trade Gruppen** (the successor of U-Landsforeningen Svalerne) imports handicrafts predominantly from Asia and concentrates heavily on handicrafts from Bangladesh.

Along with six world shops, Fair Trade Gruppen forms **Fair Trade Denmark**, the Danish association of Worldshops established in 1995. Additionally, there are some quasi-world shops in Denmark who have so far chosen to remain outside the association.

Fair Trade Denmark brings its members closer together through seminars and joint campaigning and advo-

cacy initiatives. The organisation is well established within the Danish NGO circuit and collaborates with Danida (the Danish Association for International Development) and the Danish-92-Group, a coalition of 21 environmental and development NGOs working on environmental questions and development issues.

The Worldshops have a high percentage of handicraft-based sales, namely around 80%. The food products marketed in this channel are largely imported / provided by Urtekram, a specialist in organic and natural products.

The shops are predominantly based on the work of volunteers, with only 2 people employed in the shops and one in the association.

The Danish labelling organisation **Max Havelaar Denmark** was launched in 1995. It manages 12 license contracts covering bananas, cocoa/

chocolate, coffee, honey, sugar/sweets, tea and the recently introduced orange-juice. These labelled products are currently available in more than 1,000 supermarkets in Denmark.

All the Fair Trade organisations together employ less than 10 people on a full-time basis.

## THE FAIR TRADE MARKET IN DENMARK

Worldshop sales have stagnated for many years, the net retail value remaining more or less stable at around €400,000.

Max Havelaar Denmark received a huge boost with the launch of Fairtrade bananas in November 1997. Since then Fairtrade labelled products have found their way into many supermarkets. The market shares for coffee and bananas, the two products which account together for nearly 90% of total license fees, reached 2% and 0.9% respectively. In terms of the organic banana niche market, the latter figure however translates into a market share of 70% of Max Havelaar labelled bananas. The net retail value of labelled products sold in Denmark exceeds €12m, illustrating definite progress on the 2000 figure of roughly €8m.

Compared to the increase in volumes witnessed in other countries between 2000 and 2005 the Danish market seems to have the capacity to expand further.

The same conclusion emerges from market research conducted on behalf of Fair Trade Denmark in 2004. Based on 1,010 telephone interviews it showed that only 8% of the Danish population were aware that there are Fair Trade shops in Denmark. Of those informed, 25% said to have made a purchase in a Fair Trade shop within the last two years.

The Fair Trade organisations in Denmark are aware of the need to expand the Fair Trade market. Whereas the

Fair Trade in Europe 2005	Denmark
<b>Importing organisations</b>	1
<b>Points of sale</b>	
Worldshops	6
Supermarkets	1,000
Others	31
TOTAL	1,040
<b>Paid staff (in full-time equiv.)</b>	
Importing organisations	0.3
Worldshops association	1.0
Labelling organisation	4.0
TOTAL	5.3
<b>Turnovers, in 000 €</b>	
Importing organisations	780
Worldshops	282
Retail value labelling org.	12,000
<b>Education / PR / marketing in 000 €</b>	
Importing organisations	2
Worldshops association	125
Labelling organisation	400
TOTAL	527
<b>Name of label</b>	Max Havelaar
<b>Number of label licensees</b>	9
<b>Market shares, in %</b>	
Labelled coffee	2.0
Labelled tea	< 1.0
Labelled bananas	0.9

labelling organisation is active in preparing the introduction of new products onto the market, the Danish association of Worldshops aims at opening more shops through increasing the number of awareness-raising activities, like the successful Fair Trade week in September 2005.

# FINLAND

## THE STRUCTURE OF FAIR TRADE

Finland has five importing organisations, of which **Tampere ATO** is the only one focusing solely on the wholesale business. The other four are both wholesalers and retailers at the same time (**Juuttiputiikki** in Oulu, **A-Star Ltd.** in Helsinki, **Aamutähti** in Turku and **Elämänlanka** in Kuopio).

Additionally, product procurement for the Finnish Worldshops from other European importers seems to be on the increase.

The Finnish Association of Worldshops **Maailman-kauppojen liitto ry** was set up in 1986. It has 28 members who run approximately 25 shops and who generally operate independently of one another – a necessity in a huge and sparsely populated country. Apart from their sales activities Finnish Worldshops are also deeply involved in development activities. Many of them have development cooperation projects with their trading partners or with other counterparts in their trading partners' countries.

There are about 700 volunteers engaged in running the Finnish Worldshops.

Finland has Europe's only Fair Trade ship. The Estelle, a three masted steel schooner, renovated in 1997, serves as an attractive information point on Fair Trade, wherever she docks. She is also used as a cargo ship to transport Fair Trade goods from one place to another.

The Finnish labelling organisation **Reilun kaupan edistämisdytys ry.** (Finnish Association for Promoting Fair Trade) was founded in 1998. It has 24 member associations, including the Worldshops Association, trade unions, as well as environmental, development and church organisations. The Finnish label appears on a wide range of different products, including rice, mangoes, pineapple and oranges, available in more than 3,000 outlets all over Finland.

In their educational and promotional work the Finnish Fair Trade organisations are helped by **Pro Fair Trade Finland** (Reilun kaupan puolesta ry). This is a volunteer operation that organises education and training, product promotions and tastings, campaign-

Fair Trade in Europe 2005	Finland
<b>Importing organisations</b>	5
<b>Points of sale</b>	
Worldshops	25
Supermarkets	3,000
Others	n/a
<b>TOTAL</b>	<b>3,050</b>
<b>Paid staff (in full-time equiv.)</b>	
Importing organisations	7
Worldshops association	20
Labelling organisation	5
<b>TOTAL</b>	<b>32</b>
<b>Turnovers, in 000 €</b>	
Importing organisations	300
Worldshops	794
Retail value labelling org.	7,700
<b>Education / PR / marketing in 000 €</b>	
Importing organisations	20
Worldshops association	41
Labelling organisation	239
<b>TOTAL</b>	<b>300</b>
<b>Name of label</b>	<b>FAIRTRADE</b>
<b>Number of label licensees</b>	17
<b>Market shares, in %</b>	
Labelled coffee	0.4
Labelled tea	n/a
Labelled bananas	5.0

ing, and offers its motivated volunteer workforce of about 400 people for Fair Trade related activities.

## THE FAIR TRADE MARKET IN FINLAND

Sales through the 25 Finnish Worldshops have an estimated retail value of about €790,000.

This sum is largely exceeded by the value of products sold under the FAIRTRADE label, the estimated retailing value attaining about €7.7m.

Following the introduction of Fairtrade labelled products in 1999, it has been possible to persuade many institutions to switch to Fair Trade products. Most prominent among them are the Presidential Palace and the cafeteria of the Parliament House both in Helsinki, more than 130 parishes all over the country, as well as some communal administrations, like the town councils of Kerava, Utajärvi and Paltamo.

The labelling organisation is working hard to encourage companies and businesses to introduce Fair Trade tea and coffee procurement. Interesting packages are being offered to companies trying to test Fair Trade products, along with advice on how to change to Fair Trade coffee and tea provision.

Nevertheless, the market share of coffee remains relatively low at 0.4% in a country with one of the highest level of per capita coffee consumption in the world (around 10 kilos per person per year).

The introduction of FAIRTRADE labelled bananas has proved a great success, achieving a market share of 5% within a short time, thus making bananas by far the most important source of license fee income for the labelling organisation.

Building on the success of banana sales, further fresh fruits such as lemons, oranges, pineapples, mangos and avocados have also been introduced. They are available all year round whereas South African grapes can only be bought from December to April.

A market study completed last spring revealed that although 73% of the Finnish population were aware of Fair Trade bananas, only 2-3% knew of labelled oranges or pineapples, and consequently a large campaign to increase public awareness of labelled fresh fruit took place in autumn 2005.

## FRANCE

### THE STRUCTURE OF FAIR TRADE

The largest importing organisation in France is **Solidar'Monde**, founded in 1984. It imports more than 80% of all goods sold in French Worldshops. With a team of 24 people Solidar'Monde imports from approximately 120 different producer groups in more than 40 countries. Solidar'Monde offers a wide range of around 1,500 food and handicraft products.

**Alter Eco**, founded in 1999 to import and sell Fair Trade products, has achieved remarkable success. After setting up two shops of their own they decided to close them down again and to refocus their activities towards importing and wholesaling. After only a few years, Alter Eco has managed to establish a wide range of food products and has succeeded in entering into some of the very big supermarket chains in France like Monoprix, Cora, Leclerc, Match, etc. This makes up for annual sales of about €5.4m.

There is a large number of smaller importing organisations of which Artisanat SEL and Andines are the largest ones.

**Artisanat SEL** is an organisation importing food and handicraft products from about 20 producer organisations and selling to consumers via world shops, bi-annual catalogues and a well-developed web shop. It has a turnover of €1.8m.

The organisation **Andines** was founded in 1987. It trades with 250 producer groups in 20 countries and has a turnover of €1.0m.

France has more than 160 Worldshops which are members of the national association **Fédération Artisans du Monde** (Artisans of the World Association). The shops are run by about 5,000 volunteers. The national secretariat, which is staffed by 21 employees, offers services to the member shops such as the production of literature (on volunteer management, campaign organisation, etc.), training courses (on marketing, consumer education, etc.) and advice on matters such as accounting, finance, and business management. All members use the same logo and the same means of communication in the shops. The association is very active in campaigning and acts as a powerful national partner for international activities, like those of the Clean Clothes Campaign and

activities relating to the 2005 WTO conference in Hong Kong. In this context the association cooperates closely with other social movements such as the Farmers' Trade unions and Attac.

In France Fairtrade labelling has been slower to take off than in other countries. However, since 1998 things have been moving fast and the last few years have been an incredible success for **Max Havelaar France**. Until present, Max Havelaar has attracted 74 licensees to join its scheme, so that today Fairtrade labelled products can be found in more than 10,000 French supermarkets.

A national Fair Trade forum, the **Plate-Forme pour le Commerce Equitable** (PFCE), was set up in 1997. The platform consists of more than 30 member organisations (importers and retailers, promotion organisations, etc.) which have signed a charter with a common set of rules and a shared vision. A further 20 organisations are currently awaiting full-membership. The aims of the platform are to defend the common interests of the organisations, to continue the promotion of Fair Trade in France and to lead a constructive dialogue with national and international decision-makers.

## THE FAIR TRADE MARKET IN FRANCE

Solidar'Monde has seen its turnover grow substantially in the last few years, increasing from €4.5m to €7.7m within two years. This growth applies predominantly to food products, owing to the successful enlargement of the consumer base. The share of handicraft products, which was for many years well above 50%, has decreased to around 30%.

The French Worldshops have also experienced a steep increase in their turnover, which rose from €6.3m to €9.3m in only two years. Half of the turnover of the French Worldshops is derived from the sale of food products, the other half from handicrafts.

Max Havelaar France has come a long way since the first Fairtrade labelled product hit the shelves of many supermarkets in 1998. Coffee still continues to be the most important product in terms of licensing contracts (48) and in terms of income, it is responsible for generating more than 60% of Max Havelaar's license fees. With growth rates of between 80 and 100% in the last three years, the net retail value of all products sold under the label is now estimated at €69m.

Fair Trade in Europe 2005	France
<b>Importing organisations</b>	18
<b>Points of sale</b>	
Worldshops	165
Supermarkets	10,000
Others	132
TOTAL	10,300
<b>Paid staff (in full-time equiv.)</b>	
Importing organisations	39
Worldshops association	21
Labelling organisation	25
TOTAL	85
<b>Turnovers, in 000 €</b>	
Importing organisations	9,474
Worldshops	9,300
Retail value labelling org.	69,000
<b>Education / PR / marketing in 000 €</b>	
Importing organisations	223
Worldshops association	500
Labelling organisation	750
TOTAL	1,473
<b>Name of label</b>	Max Havelaar
<b>Number of label licensees</b>	74
<b>Market shares, in %</b>	
Labelled coffee	n/a
Labelled tea	n/a
Labelled bananas	n/a

Today Fairtrade labelled coffee is served in the French Parliament (Assemblée Nationale), the French Senate, the Ministry of Foreign Affairs, in many local administrations as well as in the offices of the President of the Republic (Palais de l'Elysée).

Awareness of Fair Trade amongst the French public has taken an impressive leap forward in recent years. Whereas only 9% of those asked in 2000 said that they knew about Fair Trade, this figure has been rising for some years, reaching 56% in June 2004 and 74% in June 2005 (research by IPSOS on behalf of Max Havelaar France).

This progress is attributed to the increasing public visibility of Fair Trade actors through an improved and increased number of coordinated activities such

as the “Quinzaine du Commerce Equitable” (Fair Trade Fortnight) with its 5<sup>th</sup> edition in 2005. With the national platform (see above) acting as a coordinator, this fortnight consisted of over 2,600 single events and activities throughout France, which resulted in significant media coverage.

This strengthened position of Fair Trade has led to the official recognition of the national associations’ educational work by the Ministry of Education and the Government’s High Council on International Cooperation (Haut Conseil de la coopération internationale). This in turn has promoted the development of many new local groups.

Putting Fair Trade on the political agenda has also meant that the new Secrétariat d’Etat à l’Économie solidaire (Secretary of State for a Solidarity-oriented Economy) started working intensively on fair and ethical trade issues in 2002. This work will draw to a close at the end of 2005, not without having experienced a certain amount of controversy and criticism from different parties involved. The controversial issue at the centre of this debate is whether and to what point it may make sense to cast Fair Trade into a legal framework or to even set legally binding standards.

## GERMANY

### THE STRUCTURE OF FAIR TRADE

Germany has three main importing organisations namely **gepa**, **dwp mensch + zukunft eG** and **EL PUENTE**.

**gepa**, based in Wuppertal, is the Fair Trade importer with the highest turnover in the world. It achieved sales of €39.6m in the 2004/5 financial year, compared to €29.8m in 2000. **gepa** imports a wide range of foods and handicrafts from over 140 producer groups. It also imports on behalf of smaller Fair Trade organisations in other European countries. The 140 employees provide goods, information and educational material to a huge network of outlets, consisting of about 800 Worldshops, 6,000 (solidarity) groups, 3,000 institutions and a further 3,000 commercial outlets (supermarkets and independent stores). **gepa** has been celebrating its 30th anniversary throughout the year 2005 under the motto “fair forever”.

**dwp mensch + zukunft eG** has a turnover of €4.1m, derived from a wide range of products and 17 employees. **dwp mensch + zukunft** has significantly built upon on a long-standing relationship with Preda Fair Trade Center (Philippines) and have developed a whole range of Preda-sourced mango-based products. Its educational and lobbying work also focuses on supporting Preda in its fight for children’s rights.

After a rigorous phase of restructuring **EL PUENTE**

(last known turnover was €3.6m) seems to be moving forward again.

More than 70 wholesalers are involved in the German Fair Trade market. 41 of these wholesalers have had their Fair Trade credentials verified in detail by the German Worldshops association.

Apart from the three organisations mentioned above, only seven more importing organisations are in full compliance with the seven criteria. They include smaller organisations such as **Podi-Mohair**, **Fairkauf Handelskontor eG** (last known turnover in 2003 was €1m), **Nature and Art** (€700.000 in 2003), **APROSAS** and **RISB Regenwaldladen** as well as **BanaFair** (the specialist in Fair Trade bananas with an annual turnover of approx. €2m) and **Contigo**. The Göttingen-based **Contigo** reaches sales of €3.1m a year with a network of 8 franchise shops modelled after 2 shops of its own and through wholesaling to the independent Worldshops.

Following its restructuring in 1998 the German Worldshops association **Weltladen-Dachverband** (Worldshops Umbrella Organisation) has seen its membership rise from 280 in 1998 to 450 in 2005, now bringing together more than half of the existing Worldshops in Germany.

A corporate identity for members has been developed in the last few years and is being adopted by an

increasing number of shops. A significant amount of emphasis is being placed on professionalizing and modernizing the shops under the programme "Weltladen 2006" (Worldshop 2006). The first shops to participate in this new programme have seen their turnovers rise substantially after moving to better locations and refurbishing their shops in accordance with the new corporate design line.

Only very few shops have paid staff; most shops are run by volunteers. It is estimated that some 50,000 volunteers are active in Worldshops and Fair Trade groups throughout Germany.

Since the opening of a national secretariat in Mainz in the late nineties the association now offers a wide variety of services to its members, such as general coordination, political representation, development and coordination of campaigns and training or lobbying.

**TransFair Germany**, the German labelling organisation, was set up in 1992. Its success has significantly contributed to raising the profile of Fair Trade in Germany. To date, 85 licensing contracts have been signed. Products sold in Germany under the TRANSFAIR label include coffee, tea, cocoa/chocolate, honey, sugar/sweets, bananas, orange-juice and many others.

Fairtrade labelled products are found in most major supermarkets, constituting 23,000 outlets throughout Germany.

After several years of increasing cooperation between the major players, a national Fair Trade Forum (**Forum Fairer Handel**) was founded in November 2002 in the aftermath of the first German Fair Trade week held two months earlier. Since then this event has taken place every September, each year proving more successful than the previous. The 15 founding members include internationally known development organisations like "Brot für die Welt" (Bread for the World) or Misereor and others such as a national consumers' union, the German Catholic Youth and the German Protestant Youth. The Forum now has a small secretariat based in Mainz.

## THE FAIR TRADE MARKET IN GERMANY

The three largest importers alone have combined sales of more than €47.3m (compared to €34.6m in 2000).

The TRANSFAIR label has opened up new channels for Fair Trade products and thus generated large

Fair Trade in Europe 2005	Germany
<b>Importing organisations</b>	41
<b>Points of sale</b>	
Worldshops	800
Supermarkets	23,000
Others	9,800
TOTAL	33,600
<b>Paid staff (in full-time equiv.)</b>	
Importing organisations	187.0
Worldshops association	7.3
Labelling organisation	9.0
TOTAL	203.3
<b>Turnovers, in 000 €</b>	
Importing organisations	55,035
Worldshops	20,000
Retail value labelling org.	58,000
<b>Education / PR / marketing in 000 €</b>	
Importing organisations	1,441
Worldshops association	445
Labelling organisation	600
TOTAL	2,486
<b>Name of label</b>	TRANSFAIR
<b>Number of label licensees</b>	87
<b>Market shares, in %</b>	
Labelled coffee	1.0
Labelled tea	2.0
Labelled bananas	n/a

additional volumes of sales. The net retail value of labelled goods in Germany is now around €58m. Interestingly enough this figure has remained rather stable in the last few years.

But the year 2004 may have paved the way for further positive developments. 2004 saw the successful introduction of organic Fair Trade bananas to supermarkets nationwide. TransFair has also managed to enter into the catering sector, converting canteens of large corporations like Volkswagen, Henkel, to Fair Trade products as well as many universities. There has consequently been a substantial rise in Fair Trade coffee sales.

Many prominent personalities and institutions have switched to Fair Trade coffee and tea. The list in-

cludes many conference centres and university canteens as well as some regional Parliaments, the national Parliament (Bundestag) and the President of the Republic at his Schloss Bellevue in Berlin.

Since 1998 the national government has given wide and continuous support to Fair Trade activities in Germany. Between 2003 and 2005 a huge campaign under the slogan "fair feels good" has aimed very successfully at raising the image of Fair Trade and at making Fair Trade actors, concepts and products better known to the broader public.

The organisation of "Fair Trade weeks" with hundreds of activities all over Germany has significantly contributed to increased media attention. The results seem to point in the right direction.

A representative piece of market research showed that the percentage of Fair Trade customers has increased from 22 to 25.8% of the population between 2004 and 2005. As this increase represents 2.5 million additional consumers, the turnover and the impact of the Fair Trade movement in Germany is set to increase in the years to come.

## GREECE

### THE STRUCTURE OF FAIR TRADE AND THE FAIR TRADE MARKET

In Greece Fair Trade is still in its early stages of development.

With the help of a small grant from a European Programme **Fair Trade Hellas** was founded in 2004. Since then the founding members along with the board members and around 10 active volunteers have been establishing an interesting set of activities aimed at making Fair Trade known in Greece. They have participated in different events, festivals and fairs, where they have sold food products imported from Ctm altromercato in Italy.

Interest in North-South issues in general, or in Fair Trade issues in particular, is still rather small in Greece. Public and political awareness of, and support for NGOs and development matters, continue to be less well developed than in other European countries. Nevertheless the Greek market is thought to have a strong potential for developing Fair Trade activities in the future, provided the public gets a clearer idea of what Fair Trade is all about.

Awareness-raising is therefore a priority for the Fair Trade movement in Greece. Within a short period of time they have succeeded in gaining substantial national media coverage, with articles published in the national editions of National Geographic and ELLE magazine, Athens News (the major English weekly newspaper) and in Athens Voice (the free distributed weekly newspaper of the City of Athens).

Fair Trade Hellas also acts as the Greek member of the Clean Clothes Campaign and is part of the Greek platform of the Global Call To Action Against Poverty. Fair Trade Hellas is already exploring ways to run educational programmes in schools as well.

The first Fair Trade shop in Greece is scheduled to open in spring 2006; located in a highly visible place near the new premises of Fair Trade Hellas in the Kolonaki district, one of the most fashionable and trendy shopping areas in Athens.

Good relations with a fair number of NGO's and other organisations such as the Trade Union Associations, along with an extensive database of highly interested people should provide a good customer base to render this shop a commercial success.

# HUNGARY

An early attempt in 1995 to establish Fair Trade in Hungary involved the opening of a Fair Trade shop in Pécs, the fifth-largest town in Hungary, with strong support from EZA in Austria. This initial endeavour unfortunately failed due to lack of purchasing power and prohibitive tariffs on coffee imports, and the shop consequently had to close down after approximately 18 months of operation.

In 2004 activities aimed at setting up Fair Trade structures in Hungary were resumed through the initiative of **Útilapu Hálózat**. This is the Hungarian branch of Service Civil International (SCI), an international association organising worldwide voluntary work for young people, mainly in the form of summer work camps.

Útilapu Hálózat was rapidly joined by **Protect the Future (Védegylet)**, a civil NGO, whose aim is to raise public awareness about our responsibility for the environment. Recent activities include a successful information campaign on the WTO and its effects on sustainability, participation in international debates on the social and ecological impacts of globalization and close cooperation with other NGOs within the Seattle to Brussels Network.

In spring 2005 Védegylet organised an eco-festival (called the "Festival of Alternatives") where a Fair Trade café, offering coffee, tea, chocolate and some locally developed awareness-raising material was set up. The festival proved that there is a reasonable interest for Fair Trade products in Hungary, especially for coffee, tea, chocolate and handicrafts. The travelling café was also invited to other events and festivals during the summer.

In May 2005, a conference was organised that brought together international Fair Trade organisations, new Fair Trade organisations from Central Europe and Hungarian NGOs that were interested in playing an active role in introducing the Fair Trade concept in Hungary. The conference enabled established Fair Trade organisations in Western Europe to share their experiences with new organisations and to discuss Hungarian experts' knowledge of the market in Hungary, through lectures, workshops and case studies. The aim was to enable the people driving Fair Trade forward in Hungary to opt for the most appropriate scenario for Hungary and to adopt an action plan, clearly defining the tasks of each participating NGO.

In the meantime more partner organisations have joined the two initial partners, including the BUDS Foundation for Human and Nature Protection (Rügyeszkék), the Association of Conscious Consumers (Tudatos Vásárlók Egyesülete), the Planet Club – Network for Sustainable Development and the Hungarian Waste Management Group (Hulladék Munkaszövetség).

There are now plans to establish a **Hungarian Fair Trade Association** with a broad membership base comprised of different Hungarian NGOs. Its primary task will be to continue with awareness-raising activities, such as participating in festivals and press conferences and therefore ensuring media coverage.

Everyone involved is aware that people in Hungary are still rather price-conscious and less aware of their consumer behaviour. Awareness-raising and campaigning for a Fair Trade approach to consumerism will consequently take up a large amount of time and resources in the near future.

# IRELAND

## THE STRUCTURE OF FAIR TRADE

The restructuring of Oxfam's operations in the United Kingdom<sup>41</sup> has also impacted on the Fair Trade structures in Ireland.

**Oxfam Ireland / Northern Ireland** has a specialized division working as an importing organisation for its own three Fair Trade shops in Ireland. One of them is in Belfast, and the other two in the Republic of Ireland, namely in Galway and in Dublin.

These are the only remaining specialist shops for Fair Trade products in Ireland. In order to clearly separate them from Oxfam's second hand clothes shops a new brand identity has been developed in the last two years including a new logo, shop fronts and leaflets. These shops offer a wide range of products from producer groups in over 20 countries. Handicrafts account for nearly two thirds of the shops turnover.

As a member of the large Oxfam network, Oxfam Ireland/Northern Ireland is also highly active in the Oxfam campaign for trade justice "Make trade fair" through collecting relevant petitions and recruiting campaigners.

Some 30 or more shops sell products imported by **Dakini Fair Trade Ltd.**, a traditional player in the Fair Trade field, founded in 1996 and sourcing mainly from Thailand and Nepal. These shops are not specialist shops but as gift or household decoration shops they simply want to add Fair Trade products to their ranges.

In **Northern Ireland** the Fair Trade sector is largely dominated by the same organisations known in the United Kingdom, such as Traidcraft and others (See UK country chapter for more details on Traidcraft). Two specialized Fair Trade shops operate in Belfast: the Pueblos Fair Trade shop and the Spires Fair Trade shop in the Spires Centre shopping mall.

The establishment of the Irish labelling organisation **Fairtrade Mark Ireland** has introduced a new dynamic to the Irish Fair Trade market. The labelling organisation is supported by strong organisations like ActionAid Ireland, Amnesty International (Irish Section), Christian Aid Ireland, and the Irish Congress of Trade Unions.

Fair Trade in Europe 2005	Ireland
<b>Importing organisations</b>	3
<b>Points of sale</b>	
Worldshops	6
Supermarkets	250
Others	n/a
TOTAL	260
<b>Paid staff (in full-time equiv.)</b>	
Importing organisations	6.8
Worldshops association	no
Labelling organisation	2.3
TOTAL	9.1
<b>Turnovers, in 000 €</b>	
Importing organisations	615
Worldshops	710
Retail value labelling org.	5,000
<b>Education / PR / marketing in 000 €</b>	
Importing organisations	28
Worldshops association	no
Labelling organisation	50
TOTAL	78
<b>Name of label</b>	FAIRTRADE Mark
<b>Number of label licensees</b>	24
<b>Market shares, in %</b>	
Labelled coffee	2.0
Labelled tea	0.5
Labelled bananas	0.5

Nine years after the introduction of coffee as the first Fair Trade product, the market impact of this small organisation with less than a handful of employees is impressive. A growing range of Fairtrade labelled products like coffee, tea, chocolate, fruit, cocoa, snacks and biscuits is no longer only available from a very few specialist shops but can now be bought from more than 250 outlets.

<sup>41</sup> See chapter on United Kingdom

## THE FAIR TRADE MARKET IN IRELAND

The net retail value of the Oxfam Fair Trade shops in the whole of Ireland is €0.7m.

Sales under the FAIRTRADE Mark have risen from a net retail value of €3m in 2003 to €5m in 2004. In 2005 sales are expected to be over €6.5 million. Market shares are now at 2% for coffee and 0.5% for both tea and bananas.

At the same time public recognition of the FAIRTRADE Mark in Ireland has grown from a modest 16% in 2002 to 44% in 2004.

Ever since it was first celebrated in March 2001, the annual Fair Trade Fortnight has become increasingly successful from one year to the next.

In 2003 the concept of Fair Trade towns was introduced and Clonakilty near Cork became Ireland's first Fair Trade town. The scheme certifies towns that fulfil certain conditions, such as the stocking of FAIRTRADE Mark products in shops and cafés and the passing of a motion in support of Fair Trade by the Town Council.

In June 2005 there was a question about Fair Trade in the state exams for senior level students.

In autumn 2005 four more towns have been certified, namely Kinsale, Kilkenny, Cork and Waterford. At present there are over 30 groups of dedicated people working to get their local councils moving forward on the Fair Trade town initiative.

All these activities have attracted growing attention from the media, therefore promoting an increase in commercial and political support for Fair Trade. Many prominent institutions such as the Prime Minister's office (Department of the Taoiseach) and the Department of Foreign Affairs have switched to Fair Trade coffee.

As a result the attitude of the general public towards Fair Trade is increasingly positive. A recent Irish Government survey showed that almost 9 out of 10 Irish people thought fairer trade with people in developing countries was important and that nearly three quarters of Irish people were more likely to buy a product with the FAIRTRADE Mark than a similar product without it.

## ITALY

### THE STRUCTURE OF FAIR TRADE

Since its beginnings in 1988 the pioneering **Ctm altromercato** has grown to become one of the largest Fair Trade importing organisations in Europe, and by far the largest one in Italy. With about 80 employees, the organisation is in regular contact with, and imports goods from 150 producer groups. It supplies products to about 500 Worldshops and about 2,000 more customers through almost 500 supermarkets.

Handicraft products account for some 15% of the overall turnover.

In 1998 the original co-operative was transformed into a consortium of Worldshops, currently consisting of 124 Worldshops with 350 sales outlets throughout Italy.

Ctm altromercato continues to be one of the most

innovative Fair Trade organisations. Recent market successes include the introduction of Fair Trade products in public school canteens (the first experience of "fair procurement" in Italy), the launch of the "natyr" Fair Trade natural cosmetics line and the introduction of a Fair Trade baby clothes line (branded "Birbanda") made with organic cotton.

Italy's second largest Fair Trade importer is **Commercio Alternativo**, based in Ferrara. Its 40 employees create over 70% of their turnover with handicrafts which they sell mainly to the independent Worldshops.

**ROBA dell'Altro Mondo** imports and wholesales handicrafts only, which come predominantly from Asia. As ROBA has a focus on clothes and related products it has initiated a huge public campaign on cotton and international trade, under the title "La via del Cotone" (The way of the cotton).

There are some other importing organisations in Italy, including a few more IFAT-members like **Equo Mercato**, **Liberomondo**, **Equoland** or the **Co-operativa Chico Mendes**.

The Worldshops association **Associazione Botteghe del Mondo** has seen its membership rise from 65 to 124 member associations in the last five years with many of these local associations or cooperatives operating more than one shop. In total they represent about 300 points of sale.

The association provides many services for its members. These include the production and distribution of campaign and educational material, the organisation of meetings and discussions, the political representation of shops and the organisation of the annual Fair Trade fair “Tuttunaltracosa” (“something completely different”).<sup>42</sup>

Associazione Botteghe del Mondo plays a leading role in many campaigns at the national level and is an active member of the “Rete Lilliput” (Lilliput network), a broad NGO coalition against globalisation.

The Italian labelling organisation **TransFair Italy** is backed by a coalition of 20 member organisations whose awareness-raising and mobilising power have successfully brought labelled products to the mainstream market. Today labelled products can be purchased in about 2,900 supermarkets in Italy.

In 1999 a national Fair Trade forum was established. In 2003 it adopted the form of an association called **AGICES** – Assemblée Generale Italiana del Commercio Equo e Solidale (Italian General Assembly of Fair and Solidarity Trade). It has more than 100 members representing 213 Worldshops and including 10 importing organisations.

## THE FAIR TRADE MARKET IN ITALY

In recent years the Italian Fair Trade market has continued to grow significantly.

Ctm altromercato has experienced a steep increase in its turnover, which increased from 22.4m to 34.3m in only two years. Commercio Alternativo and ROBA dell'Altro Mondo represent turnovers of €4.8m and €0.9m respectively.

Although the largest importing organisation Ctm has dissociated from TransFair Italy, the labelled market is

Fair Trade in Europe 2005	Italy
<b>Importing organisations</b>	9
<b>Points of sale</b>	
Worldshops	500
Supermarkets	4,000
Others	n/a
<b>TOTAL</b>	<b>4,500</b>
<b>Paid staff (in full-time equiv.)</b>	
Importing organisations	128.0
Worldshops association	0.5
Labelling organisation	n/a
<b>TOTAL</b>	<b>128.5</b>
<b>Turnovers, in 000 €</b>	
Importing organisations	41,165
Worldshops	n/a
Retail value labelling org.	20,000
<b>Education / PR / marketing in 000 €</b>	
Importing organisations	210
Worldshops association	n/a
Labelling organisation	n/a
<b>TOTAL</b>	<b>210</b>
<b>Name of label</b>	TransFair
<b>Number of label licensees</b>	n/a
<b>Market shares, in %</b>	
Labelled coffee	n/a
Labelled tea	n/a
Labelled bananas	n/a

also successful. Sales generated under labelled products represent a net retail value of approximately €20m.

After the first three regional parliaments passed resolutions and legal texts regarding Fair Trade in 1999, many more local and regional bodies have followed. There are also a growing number of public authorities in cities such as Rome, Turin or Genova, who have started to buy Fair Trade products.

Through the different lobbying activities and against the background of rising consumer awareness, the importance of Fair Trade is beginning to gain recognition in the political arena too. A few members

<sup>42</sup> The 2005 edition of the fair was held in Parma and visited by more than 30,000 people

of the Italian parliament came together in December 2004 to create the "Associazione dei parlamentari per il Commercio Equo – AIES" (association of parliamentarians for Fair Trade). This association should facilitate the participation of the Italian Fair Trade movement in the legal work of the commissions and chambers of the Italian Parliament.

The second Fair Trade week organised in Italy involved 3,000 points of sale in October 2005 and started with the declaration of the capital Rome as Italy's first Fair Trade city. Many VIPs from the sport, media and cul-

tural world are now supporting Fair Trade activities. Many of the organisations involved see Fair Trade as only one part of a broader political concept<sup>43</sup>. They therefore invest a considerable amount of time in integrating Fair Trade into a broader vision for the entire non-for profit sector, including trying to incorporate the Fair Trade concept into the different areas of the social economy, co-operative movements, associations and NGOs

<sup>43</sup> As shown e.g. by the slogan "Ctm altrmercato: Fair Trade for a Fair Economy"

## LATVIA

To date, there are no formal Fair Trade structures in Latvia. Nevertheless, Fair Trade tea and coffee are already available. There is one private company importing tea and coffee into Latvia from "Clipper teas" (Dorset, UK). The products can be bought in a few of the Finnish chain supermarkets «Stockmann», in 2-3 organic and/or health shops in the capital Riga and from a stall in the central market of Liepaja, the third largest town of the country.

GLEN Latvia, one of the local partner organisations for the NEWS!-project "NEWS! goes East"<sup>44</sup> includes Fair Trade as one of the topics in its global education activities on international trade and sustainability. Another NGO called "Green Liberty"<sup>45</sup> has also been participating in the project and is developing ideas and plans for the development of Fair Trade in Latvia.

The national NGDO platform LAPAS has also been in-

involved but has not yet taken decisions on further Fair Trade related activities.

To date, no NGO has started importing and / or retailing, although a certain number of discussions on the topic have been organised and some international contacts and links have been built up.

Although some NGOs have become highly interested in Fair Trade and have the intention to promote Fair Trade widely, none of them have decided to focus on Fair Trade specifically. All of them have projects of their own with which they are preoccupied. It therefore seems that it may take some time before Fair Trade structures are in place and products are widely accessible within Latvia.

<sup>44</sup> See chapter on Part I point 2.2.5 on Cooperation in Europe  
<sup>45</sup> [www.zb-zeme.lv](http://www.zb-zeme.lv)

## LITHUANIA

In Lithuania Fair Trade is still at its very beginning.

**The Environmental Information Centre** (Aplinkosaugos informacijos centro) in Vilnius which acts as a contact point for the "NEWS! goes East"-programme<sup>46</sup> is therefore currently focusing on getting the Fair

Trade concept more widely known in Lithuania.

Different articles on Fair Trade started appearing in certain Lithuanian media at the start of 2005.

<sup>46</sup> For details see Part I, point 2.2.5 Cooperation in Europe

# LUXEMBOURG

## THE STRUCTURE OF FAIR TRADE

Due to the fact that it is located at the heart of Europe, bordered by three countries with extensive Fair Trade networks, Luxembourg has never needed to develop an importing capacity of its own. Its Worldshops have traditionally bought goods from Fair Trade importers in Belgium (Oxfam Fairtrade and Oxfam-Magasins du monde) or Germany (gepa).

Luxembourg has a population of 450,000 and 6 Worldshops. The shops are run by approximately 200 volunteers.

In 1992 the labelling organisation **TransFair-Minka Luxembourg** was founded. It has a broad basis of 32 member organisations from the Third World solidarity, environmental, church, union and youth sectors. Since all Worldshops are also members of the organisation, TransFair-Minka has been acting as a kind of national shop association as well.

Due to the fact that it sources products from neighbouring countries, for many years, the Luxembourgian market has had to accommodate both the Max Havelaar and the TransFair labels. With the unification of the Fair Trade logo in 2003, this situation has now changed for the better. Although there still remains some overlap as far as the names are concerned (TransFair, Max Havelaar and TransFair-Minka) all three now have the same visual logo. Today, Fair Trade products can be purchased in about 90 outlets throughout the country, including Worldshops and two of the main supermarket chains.

In 1999 the shops formed a separate organisation called "**Arbeitsgrupp Drett-Welt-Butteker**" (Third World shops working group), which aims to improve the coordination of the marketing activities of the shops at the national level.

It is interesting to note that Luxembourg is the last place in Europe where the title "third world shop" continues to exist.

Fair Trade in Europe 2005	Italy
<b>Importing organisations</b>	9
<b>Points of sale</b>	
Worldshops	500
Supermarkets	4,000
Others	n/a
TOTAL	4,500
<b>Paid staff (in full-time equiv.)</b>	
Importing organisations	128.0
Worldshops association	0.5
Labelling organisation	n/a
TOTAL	128.5
<b>Turnovers, in 000 €</b>	
Importing organisations	41,165
Worldshops	n/a
Retail value labelling org.	20,000
<b>Education / PR / marketing in 000 €</b>	
Importing organisations	210
Worldshops association	n/a
Labelling organisation	n/a
TOTAL	210
<b>Name of label</b>	Transfair
<b>Number of label licensees</b>	n/a
<b>Market shares, in %</b>	
Labelled coffee	n/a
Labelled tea	n/a
Labelled bananas	n/a

## THE FAIR TRADE MARKET IN LUXEMBOURG

The Luxembourg Fair Trade market reflects the small size of the population. The net retail value of the Worldshops is estimated to be somewhere around €700,000, with the largest shop in the capital reaching approximately €230,000 a year.

Through an annual expenditure of €100,000 on education and informative activities, TransFair-Minka has succeeded in developing a high degree of Fair Trade awareness among the population. The introduction of new products such as sports balls and fresh fruit has

helped improve consumer awareness, but coffee and bananas still remain the dominant product ranges.

The net retail value of goods sold under Fairtrade labels in Luxembourg amounts to approximately €2m. This means that Luxembourg has the second highest per capita consumption of Fairtrade labelled products in the world (after Switzerland), with a value of €3,90 per capita against €14 for Switzerland in 2003<sup>47</sup>.

Although Luxembourg has a few national Fair Trade licensees, the most significant quantities are distributed by Belgian, German and Dutch licensees. Between 2002 and 2005 awareness of TransFair has increased by 32% and the logo is now recognized by 63% of the population. A survey performed by ILReS in February 2005 reveals that aside from the 14% of the population who have already tried Fair Trade labelled products, a further 57% are prepared to buy this type of product.

The organisation of "Fair Trade Fortnights" in large

shopping centres throughout the country, offering a mixed programme of information on products, Fair Trade tastings, music, exhibitions and children's animation, help to spread the Fair Trade message. In Luxembourgish this message is promoted under the slogan "Gutt a fair", which has the double meaning of both "good plus fair" as well as and "a good bargain".

In the meantime a broad coalition of development and environmental NGOs along with some trade unions and Transfair-Minka has been actively lobbying local administrations to embrace social, environmental and ethically sound procurement policies. Up until now 24 administrations out of 116 have positively responded to this lobbying.

In the last few years, TransFair-Minka has also received the support of the Grand Duke of Luxembourg and Fairtrade labelled products are now being served at the Grand-Ducal palace.

<sup>47</sup> See also table 4 in chapter 3.3

## MALTA

Malta may be regarded as the Fair Trade pioneer among the new EU-member states.

Fair Trade was introduced in Malta in 1996, when **Koperattiva Kummerc Gust** (Fair Trade Cooperative) was officially registered. Today the cooperative consists of over 100 members. The day-to-day work of the cooperative is carried out by 4 volunteers and three part-time employees.

Most sales are derived through the world shop L-arka, which opened in the capital La Valletta in 1997. Plans are now being made to move to a bigger, more central location.

Further sales are generated through stalls at two major public events held each year in May on the World Fair Trade day ("Worldfest") and in November ("Taste the World" festival). Smaller events are organised in different parishes by the same group.

The Fair Trade products imported by Koperattiva come mainly from Italy (predominantly from Ctm

altromercato and from Commercio Alternativo), although a small amount comes from Equal Exchange in Edinburgh in Scotland.

The Koperattiva has always seen itself as an integral part of the wider Fair Trade movement and has therefore chosen to become a member of both Ctm altromercato in Italy and the International Fair Trade Association (IFAT). Members of the cooperative participate regularly in seminars and general assemblies held by Ctm and have attended the latest IFAT conferences.

At present, Fair Trade only reaches a small proportion of the population, but there are high prospects for increasing this reach.

Building on the growing support from many NGOs, schools and other institutions, political authorities have also started to take Fair Trade more seriously. The Minister for Environment has recently started to purchase Fair Trade coffee for his offices and has invited the cooperative Kummerc Gust to take part in an important public event on World Environment Day.

# THE NETHERLANDS

## THE STRUCTURE OF FAIR TRADE

The Netherlands has one of the most mature Fair Trade markets in Europe with a large number of importing organisations, a very dense network of Worldshops and one of Europe's biggest labelling organisations. As such it has often served as a model for others. In the seventies, Fair Trade Organisatie (or more correctly, its predecessor SOS Wereldhandel) helped to develop Fair Trade organisations in neighbouring countries and in the nineties the Max Havelaar Foundation served as the model to be followed by labelling initiatives all over the world.

**Fair Trade Organisatie** is by far the largest Fair Trade importer, accounting for roughly 60% of all sales made by the Dutch Worldshops. The organisation is staffed by 80 employees, providing the Dutch market with a broad food range and 2,500 handicraft products, sourced from approximately 90 producer groups. Fair Trade Organisatie runs 8 Fair Trade shops, 3 of them as their own shops and the other 5 under a franchising contract.

Sales are supported by the publication of 4 catalogues per year. The budget for public awareness & marketing totals around €100,000.

Fair Trade Organisatie also puts a lot of emphasis on strengthening the social economic business capacity of its trading partners and producer groups. For this purpose the organisation has established a special "Partner Development & Policy Department"<sup>48</sup>.

The second largest importer, **De Evenaar**, has a market share of about 15% in the Worldshops, and concentrates on handicrafts rather than on food.

Both importers top a list of 29 certified Fair Trade suppliers which have been officially recognised by the Dutch Worldshops association. Whereas the big suppliers provide both food and non-food products, the smaller ones focus exclusively on handicrafts, many of them sourcing from one or two countries only. 21 of these suppliers are members of the **NIVAH** (Nederlandse Importeurs Vereniging Alternatieve Handel), the Dutch Association of Fair Trade Importers.

The first Dutch Worldshop opened in 1969. Today the Dutch Worldshops Association, the **Landelijke**

Fair Trade in Europe 2005	The Netherlands
<b>Importing organisations</b>	27
<b>Points of sale</b>	
Worldshops	412
Supermarkets	3,100
Others	1,810
TOTAL	5,320
<b>Paid staff (in full-time equiv.)</b>	
Importing organisations	82.4
Worldshops association	17.1
Labelling organisation	7.2
TOTAL	106.7
<b>Turnovers, in 000 €</b>	
Importing organisations	20,643
Worldshops	30,340
Retail value labelling org.	35,000
<b>Education / PR / marketing in 000 €</b>	
Importing organisations	104
Worldshops association	320
Labelling organisation	325
TOTAL	749
<b>Name of label</b>	Max Havelaar
<b>Number of label licensees</b>	29
<b>Market shares, in %</b>	
Labelled coffee	n/a
Labelled tea	n/a
Labelled bananas	n/a

**Vereniging van Wereldwinkels (LVWW)**, has 388 member shops. The organisation has 17 employees and helps Worldshops with sales development, public relations and political action. This assistance is provided through courses, publication of material, advice on shop management and on public relations, ready made advertisements for local shops, hosting visits by producers from the South and supply of materials and advice for campaigning. Under the "Transformatie" (transformation) project,

<sup>48</sup> Previously known as Fair Trade Assistance

250 shops have in recent years undergone a comprehensive programme aimed at making the Worldshops even more attractive to the public. Four different shop profiles have helped to clarify the identity and the image of the shops and have lead to better recognition of Worldshops. The association has also invested heavily in improving the communication network with and between its members, through installing an extranet and a communication package for the member shops.

Although some Worldshops do have paid staff, Fair Trade in the Netherlands would not be possible without the dedication of approximately 12,000 people working on a voluntary basis in the Worldshops and for the Fair Trade groups.

The **Stichting Max Havelaar**, the Dutch labelling organisation, has played a pioneering role in opening up supermarkets to Fair Trade products. In addition to the traditional products like coffee, tea, honey, cocoa/chocolate, bananas and orange-juice Max Havelaar has also launched quite a few new products such as fresh fruit (wine grapes, oranges, pineapples, etc.), wine and others. About 30 licensing contracts ensure that Fairtrade labelled food products are now available in 3,500 outlets all over the country.

There is no formal national forum for cooperation between the different Fair Trade players but there are many irregular, informal meetings and contacts between the organisations.

## THE FAIR TRADE MARKET IN THE NETHERLANDS

As the oldest Fair Trade organisation in the Netherlands Fair Trade Organisatie has a turnover of €20.6m, derived in more or less equal proportions from coffee, other food products and handicrafts. The Worldshops network represents €30.3m net retail value, compared to €20.4m in 1999/2000, when the number of shops in operation was not much different from today's. Handicrafts account for 75% of this amount.

The net retail value of products sold under the Max Havelaar label is about €35m, a figure that has remained pretty stable over the last few years. Per capita retail value of labelled products has reached €2.15, the fifth highest value in Europe.

In the highly competitive Dutch market it is important to keep public interest alive through the continual introduction of new products. After launching mangos and avocados in June 2004 for example, more than 155,000 kilos were sold in just 7 months.

Many public institutions have switched to Max Havelaar coffee and tea. Many schools and the majority of Dutch municipalities serve and consume Fair Trade hot drinks, as do the Dutch Parliament and many Ministerial departments. Many companies now offer Fair Trade products in the traditional "Kerstpaketten", the Christmas packages that companies give their employees at the end of each year. Although these have been on offer for a while already, they became a tremendous success in 2003 and 2004.

# NORWAY

## THE STRUCTURE OF FAIR TRADE

There are no Worldshops, i.e. specialized Fair Trade shops with a full range of handicraft and food products in Norway today.

Handicrafts sourced from a handful of countries in South and South East Asia are brought into the country by **Fairtrade Norge**, based in Hølen, some 50 kilometres South of Oslo. From here they distribute their products to about 500 gift shops and boutiques specializing in home interior or decorations throughout Norway.

Fair Trade food products can be found nearly everywhere in Norway. They are certified by **Max Havelaar Norway**, the Norwegian labelling organisation launched in 1997.

With a workforce of 4 people, this is the only organisation in Norway to be fully integrated into the international Fair Trade context<sup>49</sup>.

To date 21 commercial importers sell Fairtrade labelled products through approximately 4,000 outlets. This means that Fair Trade coffee, tea, rice, orange juice and bananas are sold in all but one supermarket chain in Norway. Apart from the before mentioned products, others such as chocolate or sugar are available on a smaller scale.

## THE FAIR TRADE MARKET IN NORWAY

The net retail value of Fairtrade labelled products amounts to over €4.5m in 2004, which represents a 28% increase from the previous year. Coffee and bananas are the two pillars supporting Max Havelaar Norway: they account for more than 90% of its license fee income.

As the Fair Trade market share continue to be rather low in Norway (coffee at 1% and bananas at 1.5% of the national market<sup>50</sup>), there is considerable opportunity for growth in the near future.

With its budget of just over €100,000 for information, education and marketing Max Havelaar Norway is currently working on two types of campaigns. The first one is a point of sales-centred campaign in a large supermarket chain. It aims at displaying the full assortment of labelled products available along

Fair Trade in Europe 2005	Norway
<b>Importing organisations</b>	1
<b>Points of sale</b>	
Worldshops	n/a
Supermarkets	4,000
Others	n/a
<b>TOTAL</b>	<b>4,000</b>
<b>Paid staff (in full-time equiv.)</b>	
Importing organisations	n/a
Worldshops association	no
Labelling organisation	3.5
<b>TOTAL</b>	<b>3.5</b>
<b>Turnovers, in 000 €</b>	
Importing organisations	n/a
Worldshops	no
Retail value labelling org.	4,540
<b>Education / PR / marketing in 000 €</b>	
Importing organisations	n/a
Worldshops association	no
Labelling organisation	108
<b>TOTAL</b>	<b>108</b>
<b>Name of label</b>	Max Havelaar
<b>Number of label licensees</b>	21
<b>Market shares, in %</b>	
Labelled coffee	1.0
Labelled tea	0.3
Labelled bananas	1.5

with supporting information and large displays of products, informative material, product tastings, and a specially created magazine. It is scheduled to be repeated once or twice a year.

The second campaign is an ongoing network-oriented campaign, which aims to intensify the activities of the member and supporting organisations at a local level. A further boost to rising consumer awareness was the launch of Fairtrade labelled roses in October 2005, now available in the largest Norwegian flower shop chain.

<sup>49</sup> Through its membership in FLO

<sup>50</sup> This latter is equivalent to 100% of the organic banana market

# POLAND

At present, there is only one organisation in Poland dealing with Fair Trade issues. It is the **Polish Fair Trade Association «The Third World and Us»** (Stowarzyszenie Sprawiedliwego Handlu „Trzeci Świat i My”) based in Gdansk, the sixth-largest Polish city, situated on the Baltic Sea.

The organisation has 24 members and a handful of volunteers carrying out the work.

At this stage it mainly consists of informative/educational work such as the presentation on Fair Trade given in April 2005 at a public debate organised by the association in cooperation with the Foreign Ministry and the Polish UNDP office, or giving lectures in

the main Polish towns at universities and workshops for teachers.

In order to make these presentations a success, a comprehensive package of basic informative material has been prepared, some of it translated into Polish. This includes for example a website, a slide show, videos translated from English and German, a travelling exhibition or suggestions and plans for school lessons. A “Good shopping” consumer guide has also been edited, with the help of the Polish Green Network.

Plans to import Fair Trade products via Germany and to sell them both as a wholesaler and retailer are being developed.

# PORTUGAL

## THE STRUCTURE OF FAIR TRADE

Fair Trade has been promoted in Portugal by CIDAC - **Centro de Informação e Documentação Amílcar Cabral** (Amílcar Cabral Information and Documentation Centre) in Lisbon since 1998.

In August 1999 the first Portuguese Worldshop “**Loja de Comercio Justo**” was opened in the small city of Amarante, near Porto, in Northern Portugal. Six years later Amarante was the venue for the 2<sup>nd</sup> Festa Nacional de Comercio Justo, a Fair Trade fair and party with an exhibition, concerts and debates. This clearly illustrated that Fair Trade had definitely arrived in Portugal. This national festival also saw the official launch of Portugal’s very own first Fair Trade importing organisation named **Equação** (Equation), which had started business in August 2004.

Fair Trade in Portugal is rapidly gaining momentum and new Worldshops are opening. At present there are already 11 recognised Worldshops. Until the end of 2005 CIDAC assumes the coordinating role of the national association, named CPCJ - **Coordenação Portuguesa do Comércio Justo** (Portuguese Fair Trade Coordination). The association was created on

World Fair Trade Day 2002. Among its members are the importing organisation Equação, 3 development NGOs and 7 shop organisations. Some of the member organisations manage 2 Worldshops each, such as Alternativa (a shop in both Barcelos and in Braga) or Reviravolta with 2 shops in Porto.

Coordination is mainly being done through regular monthly meetings.

The Coordenação has become a member of NEWS! (see 2.4) and is very active in international cooperation programmes with other Fair Traders in Spain and Italy.

## THE FAIR TRADE MARKET IN PORTUGAL

In 2004 the importing organisation had sales of approx. €90,000 (after only 5 months of business). The shops which made their figures available accounted for a little more than €180,000 of retail value. For 2005 this figure will most probably lie between €250,000 and €300,000.

In Portugal everything points towards another success story for Fair Trade. The players involved are already well ahead with their plans: they want to see more Worldshops opening, they are willing to intensify their lobbying and promote ethical consumption in private and public institutions and they are already thinking about how to get Fair Trade products sold in supermarkets.

Some of the Portuguese Fair Trade players have good contacts with Portuguese-speaking countries like Guinea-Bissau or East Timor. They want to develop these relations further and introduce Fair Trade to producer groups from these countries.

Fair Trade in Europe 2005	Portugal
<b>Importing organisations</b>	1
<b>Points of sale</b>	
Worldshops	9
Supermarkets	no
Others	11
TOTAL	20
<b>Paid staff (in full-time equiv.)</b>	
Importing organisations	0
Worldshops association	no
Labelling organisation	no
TOTAL	0
<b>Turnovers, in 000 €</b>	
Importing organisations	92
Worldshops	294
Retail value labelling org.	no
<b>Education / PR / marketing in 000 €</b>	
Importing organisations	2
Worldshops association	5
Labelling organisation	no
TOTAL	7
<b>Name of label</b>	no
<b>Number of label licensees</b>	no
<b>Market shares, in %</b>	
Labelled coffee	no
Labelled tea	no
Labelled bananas	no

## SLOVAKIA

In February 2003 a small group of dedicated people founded **FAIRTRADE Slovakia** with the aim of promoting the Fair Trade idea in Slovakia.

Through a well-balanced program of information, motivation and networking, the organisation has made Fair Trade known in Slovakia within a short space of time and has thus paved the way for successful years ahead. They have made use of different opportunities for testing products (such as selling in a shopping

centre, at Latino parties etc), before establishing a regular sales outlet in Slovakia.

In November 2005 a separate business company **FAIRTRADE Slovakia s. r. o.** was established. It will focus both on wholesaling and on retailing Fair Trade products.

During this time the organisation **Ekoporad a Živica** in Bratislava started selling Fair Trade products in

their eco-shop, alongside its product range focused on environmental criteria, with some additional hemp products coming from India and Nepal.

The Fair Trade products are mainly sourced via EZA Fairer Handel in Austria and the Ecumenical Academy in Prague in the Czech Republic.

The summer of 2005 saw the first specialized Fair Trade Shop open in Bratislava, Slovakia. The shop named "Ten Senses" is located right in the city centre and is run by **Integra**, an NGO engaged in micro-enterprise development in Central and Eastern Europe. Whereas the overseas products are sourced through Fair Trade organisations from neighbouring countries like Eine-Welt-Handel from Austria or Commercio Alternativo from Italy, the shop also offers a new

dimension to Fair Trade: plenty of room is given to small producers from Slovakia, the Czech Republic and Poland. This matches extremely well with the overall aim of Integra to develop markets for small producers in the South as well as in the North through fostering both North-South trade and North-North trade.

After its opening, shop sales have exceeded all expectations, reaching over €600 a day, more than double the planned figure. The wholesale channel supplies five Shell retail stations and five bars and restaurants in Bratislava. By the end of 2005 Integra aims to have created a website and a full product catalogue.

Plans are already under way to bring the Fair Trade idea to other countries, in which Integra is active, namely Bulgaria and Romania.

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## SLOVENIA

Fair Trade in Slovenia was initiated by the Slovenian human rights NGO **Humanitas**. In 2002, Humanitas organised a sales exhibition, focussing on products from Burkina Faso.

In late 2003 the environmental organisation **Umanotera** joined the initiative. After a second successful sales exhibition in March 2004 it was clear that the next step was going to be the opening of a Fair Trade shop in the capital.

On 10 December 2004, the International Human Rights Day, the first Slovenian world shop opened at Stari trg 30, in the city centre of Ljubljana. Among the official guests were the ambassador of the European Commission Delegation to Slovenia and the mayor of Ljubljana. The city of Ljubljana helped with the rent of the shop.

For the time being the majority of the products are

imported from EZA Fairer Handel in Austria. In addition, Humanitas is providing direct contact with producers from Nepal, Ghana, Burkina Faso, Kenya and Uganda.

There are already plans to become independent from other importers by sourcing as directly as possible. In so going, the driving forces within the movement want to extend the Fair Trade concept beyond the traditional countries of the South. They are planning to start working with projects in the Balkans and in the former Soviet Union republics of the Caucasus.

The shop has one employee, aided by a group of about 30 volunteers. A second person should be employed soon.

The main challenges for the future will be the opening of a second Worldshop in Slovenia and the mainstreaming of Fair Trade products.

# SPAIN

## THE STRUCTURE OF FAIR TRADE

The Spanish Fair Trade market is dominated by three big importing organisations: **Intermón Oxfam**, **Alternativa 3** and **IDEAS**.

**Intermón Oxfam**, a member of the worldwide Oxfam organisation, is a development NGO with a long history of activism in Spain on Third World issues. In the early nineties it launched a small Fair Trade operation that has quickly expanded to become by far the largest Fair Trade importer in Spain. Its dense network of more than 35 own Worldshops generates about 80% of Intermón Oxfam's turnover. Apart from this the organisation also supplies most of the independent shops all over Spain. More than 50% of the turnover is derived from handicrafts.

**Alternativa 3**, based near Barcelona, has a stronger focus on food products, especially on coffee, which accounts for 37% of its turnover. It sells through its own shop and delivers Fair Trade goods to the other independent Spanish Worldshops and to many church groups. Alternativa 3 is thought to be the only Fair Trade organisation in Europe with a coffee roaster of its own, where the imported coffee beans are roasted, ground and packed.

**IDEAS** is both a non-profit cooperative and an officially recognized NGO, strongly rooted within the movement for a solidarity economy. Against this background it is proud to have been given the responsibility of representing the International Fair Trade Association (IFAT) within the International Council of the World Social Forum. IDEAS has a strong emphasis on food products, which accounts for more than 60% of its turnover. It sells mainly to Worldshops and solidarity groups and has 3 shops of its own (IDEAS del Mundo). Together with other EFTA members in Belgium, Italy and the Netherlands, IDEAS is successfully running the European programme "Fair Procura" on Fair Trade standards for public procurement.

There are nine more importing organisations on the list of the Spanish Worldshop association including **Adsis Equimerca**, **Xarxa Consum Solidari** and **Sodepaz**.

Fair Trade in Europe 2005	Spain
<b>Importing organisations</b>	12
<b>Points of sale</b>	
Worldshops	95
Supermarkets	n/a
Others	850
<b>TOTAL</b>	<b>1,090</b>
<b>Paid staff (in full-time equiv.)</b>	
Importing organisations	26
Worldshops association	1
Labelling organisation	2
<b>TOTAL</b>	<b>29</b>
<b>Turnovers, in 000 €</b>	
Importing organisations	7,897
Worldshops	12,262
Retail value labelling org.	no
<b>Education / PR / marketing in 000 €</b>	
Importing organisations	252
Worldshops association	no
Labelling organisation	no
<b>TOTAL</b>	<b>252</b>
<b>Name of label</b>	<b>FAIRTRADE / Comercio Justo</b>
<b>Number of label licensees</b>	11
<b>Market shares, in %</b>	
Labelled coffee	no
Labelled tea	no
Labelled bananas	no

The first two **Spanish Worldshops** were opened in 1986. Today, Spain has about 95 Worldshops or "solidarity shops". They are well distributed throughout mainland Spain as well as being present on the islands of Mallorca, Menorca and the Canary Islands.

Much effort has been devoted to raising a common profile for the shops. This has led to the rapid spread of the "Justo aquí" ("Just here") logo. Taking into account the multi-lingual situation in Spain, this logo has four different language versions.

Spanish Worldshops have a variety of styles, reflecting their different backgrounds and the particular importer with which they are associated. In recent years, the Worldshops of Intermón Oxfam and IDEAS have adopted a corporate identity which makes them easily recognisable.

The role of “Worldshop association” is assumed by the *Coordinadora de Organizaciones de Comercio Justo* (see below), which has also become the Spanish member of NEWS! (see 2.4.).

After a good deal of preparation, the Spanish labelling organisation **Asociación del Sello de Productos del Comercio Justo** (Fair Trade product labelling association) went public in October 2005, making Spain the fifteenth European country to adopt this scheme. The association has 9 strong organisations forming its base, among which are the leading importers, *Cáritas* Spain, SETEM (an important development NGO) and the Consumers and Users Confederation.

The national Fair Trade forum, founded in 1996, has also joined the labelling organisation. The **Coordinadora de Organizaciones de Comercio Justo** (Coordination of Fair Trade Organisations) has a membership of 34 Fair Trade organisations. Together these organisations have a workforce of over 90 full-time employees and manage about 1,200 volunteers.

The main objective of the *Coordinadora* is to bring the different Fair Trade players (importers, wholesalers or distributors, Worldshops and development NGOs) together regularly in order to improve the coordination of Fair Trade-related activities and to further raise the profile of Fair Trade in Spain.

## THE FAIR TRADE MARKET IN SPAIN

Currently the three largest Fair Trade importers have a joint turnover of about €7.8m

The dynamic of the Spanish Fair Trade market, even before the labelling initiative is taken into account, is clearly illustrated through comparing this figure to the €3.8m figure of five years ago. The sales of Intermón have doubled within 3 years.

In its study on Fair Trade in Spain<sup>51</sup> SETEM found that between 2000 and 2003 the aggregate turnover of all Fair Trade players in Spain had risen by 47%, from around €7.0m in 2000 to €10.7m three years later. According to this source, 2003 was also a turning point as the sale of food products topped handicraft sales for the very first time. A sustained growth in coffee sales contributed heavily to this result.

This positive trend is likely to continue with the introduction of labelled coffee, tea, chocolate and sugar in autumn 2005. 11 organisations have decided to sign licensing contracts with the labelling organisation and to market labelled products.

There is still much to be achieved within the Spanish context. A consumer survey done in 2003 by the Foundation Grupo Eroski<sup>52</sup> concluded that at the end of 2003 “the concept (of Fair Trade) is still new and hardly known by most of the consumers.” Two thirds of the 5,000 people interviewed said that they had no intention of buying Fair Trade products.

The repetition of the survey in 2004 showed that a large proportion, namely 23% of those interviewed, could not answer the question as to whether or not they had bought Fair Trade products during the last 12 months. This seems to indicate that the “knowledge, visibility, and above all, the differentiation of this type of product is insufficient”.

Attractive marketing to Spanish consumers results in a positive response to Fair Trade. This is highlighted by the tremendous success of the Forum Barcelona in 2004, where Intermón Oxfam, Alternativa 3 and SETEM joined together to stage an exhibition on Fair Trade and to run a Worldshop during the almost 5-month duration of the Forum.

During this time, over 780,000 people viewed the exhibition, more than 80,000 of them signing a petition on workers’ rights in Southern countries and more than 96,000 of them purchasing something from the shop.

<sup>51</sup> SETEM, *El Comercio Justo en España, 2004*

<sup>52</sup> *Barómetro de Consumo 2004*

# SWEDEN

## THE STRUCTURE OF FAIR TRADE

Sweden has four Fair Trade importing organisations, all of which are members of IFAT.

**Sackeus AB** focuses on food products only, with the exception of a few rare non-food products like sports balls or t-shirts. Coffee alone accounts for 75% of its turnover. It supplies the Worldshops, as well as other markets such as institutions, individual commercial stores and chains of commercial stores.

**Rättvis Handel Import AB** was founded in 2001 by the combined effort of the Swedish Worldshops, who are also the biggest customers. The organisation sources from 45 different producer groups and focuses largely on handicrafts, which account for 75% of its sales. The remaining 25% derives from the sale of coffee, tea, chocolate, sweets, sauces and spices.

**La Maison Afrique AB** imports handicrafts from 27 micro-enterprises in Madagascar and the Comoros exclusively.

**North & South Fair Trade AB** deals in both handicrafts and food products.

The Swedish Worldshops Association **Världsbutikerna for Rättvis Handel** has 35 full members. Most of the work of the shops is done by an estimated 1,000 volunteers, there being very few paid staff.

There have been Worldshops in Sweden for over 30 years, and they started to meet together on a regular basis in 1986.

Today the members use the name "Världsbutik" (Worldshop) and the common logo appears in all of their communications. Although some shops have closed down in recent years, new shops have opened and some established shops have moved to better locations. Overall, the number of shops has increased over the last few years. A need is felt to further professionalize the shops, but this seems to be restrained by the limited number of personnel and financial resources.

Many of the food products available in the Worldshops have the organic label KRAV.

The Fairtrade labelling organisation **Föreningen för Rättvisemärkt** was set up in 1996. Today it embraces

Fair Trade in Europe 2005	Sweden
<b>Importing organisations</b>	4
<b>Points of sale</b>	
Worldshops	35
Supermarkets	n/a
Others	300
TOTAL	340
<b>Paid staff (in full-time equiv.)</b>	
Importing organisations	10
Worldshops association	2,0
Labelling organisation	5,0
TOTAL	12,5
<b>Turnovers, in 000 €</b>	
Importing organisations	2,188
Worldshops	728
Retail value labelling org.	5.480
<b>Education / PR / marketing in 000 €</b>	
Importing organisations	41
Worldshops association	46
Labelling organisation	n/a
TOTAL	87
<b>Name of label</b>	FAIRTRADE / Rättvisemärkt
<b>Number of label licensees</b>	15
<b>Market shares, in %</b>	
Labelled coffee	< 1,0
Labelled tea	< 1,0
Labelled bananas	< 1,0

a large coalition of church organisations, the two largest unions, consumer associations and foreign aid institutions. Aided by the existence of 25 licensing contracts, a broad range of Fairtrade labelled products can be found in supermarkets all over the country.

Although distances in Sweden tend to hinder joint campaigning, cooperation among the Fair Trade actors has significantly improved in the last years, encouraged through the European-wide campaigns promoted by NEWS! (see 2.4.).

## THE FAIR TRADE MARKET IN SWEDEN

The four importers Sackeus, Rättvis Handel Import, North&South Fair Trade and La Maison Afrique have a joint turnover of about €2.2m.

The 35 Worldshops account for a joint retail value of about €730,000, half of which is through sales of handicrafts.

The biggest portion of the Fair Trade market in Sweden is comprised of products sold under the Rättvisemärkt label. The estimated net retail value amounts to €5.5m, reflecting a growth of 40% between 2003 and 2004. The market share for all products is still lower than 1%.

The Swedish Parliament, the Swedish Government, SIDA (the Swedish Development Cooperation Agency) and parts of the Swedish Church are among the

most prominent users of Fairtrade labelled coffee in Sweden. Many municipalities and companies are following this example.

Following a national survey in all Swedish municipalities regarding their use of Fair Trade products, the labelling organisation is encouraging citizens to send in so-called "citizen propositions" calling on the town councils to change to Fair Trade products. In these activities, as well as those aimed at enterprises, the labelling organisation is helped by a large number of interested people. Since 1998 more than 600 so-called "Fair Trade ambassadors" have been trained.

All these activities seem to be very successful. An awareness study carried out on behalf of Max Havelaar/Rättvisemärkt Sweden in 2004 and repeated in 2005, showed that awareness of the label among Swedish consumers had risen from 39% to 47% in just one year.

## SWITZERLAND

### THE STRUCTURE OF FAIR TRADE

The largest Swiss importing organisation is **claro fair trade AG**. claro fair trade is not only an importing organisation but also has a strong network of Worldshops all over Switzerland. The organisation is well known to consumers all over Europe for its state-of-the-art chocolate product line called Mascao.

The second largest importer, **Caritas Fairness**, sources from some 60 producer groups and has a strong emphasis on handicraft products coming mainly from Asia and honey from Latin America. The organisation runs three UNICA-shops of its own in Lucerne, Zurich and since October 2005 also in Basel.

**gebana** builds on the expertise of people campaigning around banana-related questions for more than 30 years. Founded in 1988 the trading company counts among the very pioneers of Fair Trade in Europe, although it has taken long before the banana has finally found its place in the Fair Trade system. In recent years they have diversified and the product range now also includes dried fruit, nuts, spirits, etc. In a joint venture with claro ag both partners run a sophisticated web shop offering 150 different food products from both companies.

Other smaller importers are **TerrEspoir**, **Zur Kalebasse** and **Helvetas**.

The claro shop formula "**claro-Weltläden**" (claro Worldshops) is a well developed cooperation model. Some 140 so-called claro A-shops have committed themselves to strict criteria regarding their location and size, their opening hours, a corporate design and joint promotion activities.

There are a further 71 Worldshops and 17 partner shops, which are regular claro customers. Additional customers of claro fair trade are about 50 bio-shops, 72 retailers, 30 parishes and 44 key accounts with a variably large part of Fair Trade products on offer.

The **Association Romande des Magasins du Monde** (French-speaking Association of World Shops) occupies a second Swiss seat within NEWS! About 1,000 volunteers run 40 Worldshops in French-speaking Switzerland. After a restructuring process the association has decided to reduce the wholesaling business to claro fair trade in order to focus more strongly on campaigning, education and information, professionalise the shops, etc. In the future, the shops will get most of their products directly from claro fair trade.

Reflecting the multi-lingual situation in Switzerland there are also a few Italian-speaking shops, forming part of the claro shop group but also maintaining close ties with the Italian Worldshops association.

**Max Havelaar Switzerland**, the Swiss labelling organisation, founded in 1992, is one of the big Fair Trade successes.

From the very beginning the two largest Swiss food retail chains, Migros and Co-op (who together represent more than 75% of the Swiss food retail market), have been keen to have Fairtrade labelled products on their shelves. This very broad distribution has led to huge popularity of the Fair Trade concept in Switzerland.

As a result, Max Havelaar has, to date, been able to sign about 60 license contracts. The product range has been constantly growing, and apart from the classical Fair Trade products like coffee or tea, it now also includes fresh fruit, flowers, cotton and textile, just to name a few. Currently labelled products may be purchased in more than 2,500 supermarkets all over the country.

A national forum on Fair Trade was founded in March 1999 under the name of SFFH – **Schweizer Forum Fairer Handel** (Swiss Forum on Fair Trade), with the aim of strengthening cooperation in the field, enabling a regular exchange of information and coordinating all Fair Trade related activities. Among the members are claro fair trade, the Association Romande des Magasins du Monde, Max Havelaar, gebana, and the most important Swiss development NGOs.

## THE FAIR TRADE MARKET IN SWITZERLAND

claro fair trade's turnover is among the highest of import organisations in Europe, with €11.8m. It is largely food product-based (86%) and nearly half of it is generated through exports to other Fair Trade organisations in Europe.

The other important importers gebana and Caritas have both a turnover of approximately €2.2m each. Market penetration of Max Havelaar labelled products is one of the highest in Europe. Tea, coffee and rice have between 5 and 6% each, sugar reaches 10%, honey 14% and flowers even 28%. The top-selling Fair Trade bananas have an unprecedented (and probably never dreamed-of) 47% market share. This commercial success has meant that the Swiss Max Havelaar Foundation has become completely independent of any outside finance other than its license fees.

The retail value of labelled products has been soaring from €73m in 2002 to €101m in 2003 and again to €136m in 2004.

Fair Trade in Europe 2005	Switzerland
<b>Importing organisations</b>	7
<b>Points of sale</b>	
Worldshops	300
Supermarkets	2,500
Others	20
<b>TOTAL</b>	<b>2,820</b>
<b>Paid staff (in full-time equiv.)</b>	
Importing organisations	43,9
Worldshops association	3.4
Labelling organisation	15.8
<b>TOTAL</b>	<b>63.1</b>
<b>Turnovers, in 000 €</b>	
Importing organisations	15,655
Worldshops	1,980
Retail value labelling org.	136,028
<b>Education / PR / marketing in 000 €</b>	
Importing organisations	157
Worldshops association	13
Labelling organisation	486
<b>TOTAL</b>	<b>656</b>
<b>Name of label</b>	Max Havelaar
<b>Number of label licensees</b>	31
<b>Market shares, in %</b>	
Labelled coffee	6.0
Labelled tea	5.0
Labelled bananas	47.0

The decision of the large chain Coop to stop selling any other bananas than Max Havelaar bananas has played an important part in this development, as well as the launch of such a new product like flowers, which were introduced only in 2004.

In a situation like the Swiss one, new questions begin to appear on the Fair Trade horizon. They deal with the remaining sources for growth in partly stagnating consumer markets, with the pressure to launch new products again and again, with increasing competition from very big players and multinationals, and so on.

All players agree that the years ahead hold a lot of challenges for everybody involved. Observers from the outside will have the opportunity to continue learning from the extraordinary Swiss experience!

# UNITED KINGDOM

## THE STRUCTURE OF FAIR TRADE

In the last five years the United Kingdom has proved to have probably the most dynamic Fair Trade structures of all European countries.

They have undergone a far-reaching restructuring process and have simultaneously experienced incredible growth rates.

One of the two big traditional Fair Trade players has almost totally withdrawn from trading. Following an in-depth study into the effects of Fair Trade on 18 producer groups in seven countries across Asia, Africa and Latin America, **Oxfam GB** has indeed stopped its importing activities.

The study concluded that Oxfam had much more impact through its work on capacity-building and market access than through buying and reselling products. Following this decision, Oxfam GB also withdrew from the European Fair Trade Association (EFTA).

Today Oxfam GB is very active in campaigning and lobbying on international trade issues<sup>53</sup>.

The largest Fair Trade organisation in terms of staff numbers and product range is Traidcraft, with over 140 employees. **Traidcraft** has an extensive network of Fair Traders who are local representatives. They buy products and sell them on at stalls in their churches, workplaces, and neighbourhoods or to friends and family members. There are currently more than 5,000 Fair Traders whose sales account for 50% of Traidcraft's turnover. The organisation also operates an important mail order catalogue business with more than 42,000 regular customers.

Traidcraft Exchange, the separate but associated development charity, works on market access and development with organisations in the south. It also has a strong policy department, lobbying both at the UK and EU level.

**Cafédirect** plc, founded 15 years ago, was responsible for launching the UK's first Fair Trade coffee product and has since become the UK's largest Fair Trade hot drink company. It is the fourth largest roast and

ground brand in the British coffee business and the eighth largest tea brand. Its brands, Cafédirect 5065, Cafédirect Roast & Ground, Teadirect and Cocodirect, are stocked in most of the major retailers, independent retailers and whole food stores, and they have a growing profile in the out of home sector.

Cafédirect buys from 36 producer organisations in 11 countries, ensuring that over a quarter of a million producers and their families receive a decent income from their trade. In 2004 it successfully issued shares and now has 4,500 shareholders including producers, who are represented on the Board of Directors. Through its unique Gold Standard Fair Trade model Cafédirect goes beyond the minimum Fair Trade criteria. A defining principle of the model is its commitment and relationship with its partner producers; it reinvests parts of its profits (8% of gross profit in 2004) into their businesses in order to strengthen their capacities and knowledge.

Cafédirect was set up as a joint venture by a group of four organisations, namely Oxfam GB, Traidcraft, Equal Exchange and Twin Trading.

**Twin Trading**, which calls itself the "leading alternative trading company in the UK", has also been behind the founding of two more Fair Trade organisations in the UK.

The **Day Chocolate Company** was created to give Ghanaian cocoa producers direct market access. Its brands "Divine chocolate" and "Dubble" are not only well-known in the UK, but also in the Netherlands, the US and Canada. In 2001 Twin launched **AgroFair UK** to market fresh fruit to retailers in the UK.

The **Body Shop** runs a community-trade department and sources an impressive volume of materials from producers in the South under Fair Trade conditions. Although the Body Shop per se is not a Fair Trade organisation, it shares the values of Fair Trade and is therefore an associate member of IFAT, the International Fair Trade Association.

Smaller importers include **Equal Exchange** (based in Edinburgh), **Tearcraft** (specializing in handicrafts and celebrating its 30<sup>th</sup> anniversary in 2005), **FM**

**Foods – Tropical Wholefoods** and the **Bishopston Trading Company**, concentrating heavily on clothes sold mainly in five of its own shops.

The network of independent Worldshops is the **British Association for Fair Trade Shops (BAFTS)**. The association currently has 70 members, which runs a total of about 100 shops.

BAFTS was established in 1995 and operates with an annual budget of about €20,000. The amount and range of services and support provided for members is increasing, along with the use of IT and the Internet to deliver these services. The association publishes a UK Directory of Fair Trade Importers which is regularly updated.

The **Fairtrade Foundation** is the UK member of FLO (see 2.4). It was founded in 1992 to certify the use of the FAIRTRADE Mark and to introduce Fair Trade products into British supermarkets. The Foundation has 13 member organisations and some 60,000 individual supporters. To date it has signed 178 contracts with licensees that market over 1,100 products, the widest range of Fairtrade labelled products available in any country. Products bearing the FAIRTRADE Mark are now available in all British supermarkets chains.

The **Fair Trade Leaders Forum** established with the help of IFAT is an informal organisation comprising of chief executives of the major UK Fair Trade organisations, i.e. the Fairtrade Foundation, BAFTS and all UK members of IFAT. It meets three times a year and discusses common concerns related to the development of Fair Trade in the UK; it engages with other networks and tries to have an impact upon the international debates on trade.

## THE FAIR TRADE MARKET IN THE UNITED KINGDOM

The UK seems to be the fastest growing Fair Trade market in the world.

Traidcraft's turnover has doubled over the last four years to €20.3m, reflecting sustained growth throughout the different channels of sale.

Cafédirect plc has experienced a yearly growth rate of 20%. It now has a turnover of €25.2m and represents 35% of UK Fair Trade coffee and tea retail sales.

Fair Trade in Europe 2005	United Kingdom
<b>Importing organisations</b>	60
<b>Points of sale</b>	
Worldshops	100
Supermarkets	3,100
Others	5,000
TOTAL	8,200
<b>Paid staff (in full-time equiv.)</b>	
Importing organisations	237.0
Worldshops association	0.5
Labelling organisation	18.3
TOTAL	245.8
<b>Turnovers, in 000 €</b>	
Importing organisations	59,556
Worldshops	10,401
Retail value labelling org.	206,289
<b>Education / PR / marketing in 000 €</b>	
Importing organisations	8,496
Worldshops association	20
Labelling organisation	1,453
TOTAL	9,969
<b>Name of label</b>	FAIRTRADE Mark
<b>Number of label licensees</b>	178
<b>Market shares, in %</b>	
Labelled coffee	20.0
Labelled tea	0.5
Labelled bananas	0.5

The Day Chocolate Company and AgroFair Ltd. have turnovers of €8.2m and €2.9m respectively. The four smaller importers; Equal Exchange, Tearcraft, FM Foods – Tropical Wholefoods and the Bishopston Trading Company total an aggregate sales level of approximately €6.3m.

The members of BAFTS have a total net retail value of approximately €10.4m.

The value of products sold under the FAIRTRADE Mark have more than doubled between 2002 and 2004, increasing from a net retail value of around €91m to over €206m, thus making the UK market the largest

53The "Make Trade Fair" campaign and Oxfam's involvement in the "Trade Justice Movement" can be cited as good examples of this.

single market of Fairtrade labelled products in Europe. Today more than 3 million Fair Trade hot drinks are consumed daily in the UK.

Institutions using Fair Trade products include the House of Commons, the Scottish Parliament, The Welsh National Assembly, the Department of Trade and Industry, the Department of Health, the Department for International Development and the Treasury. Many local authorities have become supportive of Fair Trade through the "Fair Trade Town" movement. There are now 140 Fair Trade towns and cities in the UK, whose councils have passed resolutions supporting Fair Trade and who have committed themselves to using Fair Trade products. There are also over 1,700 churches in the UK who have declared themselves "Fair Trade churches".

Through these local Fair Trade schemes, awareness of Fair Trade has been on the rise for several years now. Between 2002 and 2005 recognition of the FAIRTRADE Mark has more than doubled, with 20% of the adult population recognising the mark in 2002 compared to 50% in 2005. According to the latest MORI poll published in May 2005 the highest level of recognition of the FAIRTRADE Mark comes from the 25-34 age group. Together with the fact that the majority of those buying Fairtrade labelled products are "recent converts", this suggests that there is a great future for Fair Trade in the UK.

# PART THREE

## Annexes

**Annex 1: Contact details of the Fair Trade organisations  
which participated in this survey**

**Annex 2: Detailed summary table**

**Annex 3: Notes on the summary table**

**Annex 4: International membership list**

**Annex 5: Methodological remarks**

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Web: [www.wereldwinkels.nl](http://www.wereldwinkels.nl)  
E-mail: [info@wereldwinkels.nl](mailto:info@wereldwinkels.nl)  
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### Stichting Max Havelaar

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Web: [www.maxhavelaar.nl](http://www.maxhavelaar.nl)  
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E-mail: [maxhavelaar@maxhavelaar.no](mailto:maxhavelaar@maxhavelaar.no)  
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## POLAND

### Stowarzyszenie Sprawiedliwego Handlu / Polish Fairtrade Association

ul. ks. Józefa Zator Przytockiego 3  
PL-80-245 Gdańsk  
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## PORTUGAL

### Coordenação Portuguesa de Comércio Justo

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### Equação

#### Associação de Comércio Justo

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Fax: +386 1 439 71 05  
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## SPAIN

### ALTERNATIVA 3, S.COOP.

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## SWEDEN

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### Rättvis Handel Import AB

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Tel: +46 31 224696  
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Web: [www.rattvishandel.se](http://www.rattvishandel.se)  
E-mail: [info@rattvishandel.se](mailto:info@rattvishandel.se)

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### **Bishopston Trading Company**

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### **FM Foods**

#### **(Tropical Wholefoods)**

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Fax: +44 191 516 9946  
Web: [www.tropicalwholefoods.co.uk](http://www.tropicalwholefoods.co.uk)  
E-mail: [Karen@fmfoods.co.uk](mailto:Karen@fmfoods.co.uk)  
Contact: Karen Hetherington

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Web: [www.tearfund.org](http://www.tearfund.org)  
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## INTERNATIONAL

### European Fair Trade Association

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Fax: +31 43 325 84 33  
Web: [www.eftafairtrade.org](http://www.eftafairtrade.org)  
E-mail: [efta@antenna.nl](mailto:efta@antenna.nl)  
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### Fairtrade Labelling Organizations

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Fax: +49 228 242 1713  
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Fax: +31 8 47 47 44 01  
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### Network of European Worldshops

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Contact: Anja Osterhaus

## ANNEX 2 SUMMARY TABLE

All figures as available per October 2005. Most figures refer to the financial year 2004, i.e. the business year ending between 1 July 2004 and 30 June 2005; a very small number of the figures refer to earlier years. All figures are minimum figures. For a detailed explanation see Annex 3.

Fair Trade in Europe 2005	Austria	Belgium	Denmark	Finland	France	Germany	Ireland
<b>Importing organisations</b>	6	5	1	5	18	41	3
<b>Points of sale</b>							
Worldshops	100	295	6	25	165	800	6
Supermarkets	2,000	700	1,000	3,000	10,000	23,000	250
Others	1,250	50	31	n/a	132	9,800	n/a
TOTAL	3,350	1,050	1,040	3,050	10,300	33,600	260
<b>Paid staff (in full-time equiv.)</b>							
Importing organisations	38.9	44.7	0.3	7	39	187.0	6.8
Worldshops association	2.6	30.0	1.0	20	21	7.3	no
Labelling organisation	7.0	8.5	4.0	5	25	9.0	2.3
TOTAL	48.5	83.2	5.3	32	85	203.3	9.05
<b>Turnovers, in 000 €</b>							
Importing organisations	12,805	17,055	780	300	9,474	55,035	615
Worldshops	7,460	7,735	282	794	9,300	20,000	710
Retail value labelling org.	15,781	20,000	12,000	7,700	69,000	58,000	5,000
<b>Education / PR / marketing in 000 €</b>							
Importing organisations	232	200	2	20	223	1,441	28
Worldshops association	142	81	125	41	500	445	no
Labelling organisation	325	288	400	239	750	600	50
TOTAL	699	569	527	300	1,473	2,486	78
<b>Name of label</b>	FAIRTRADE	Max Havelaar	Max Havelaar	FAIRTRADE	Max Havelaar	TransFair	FAIRTRADE Mark
<b>Number of label licensees</b>	23	32	9	17	74	87	24
<b>Market shares, in %</b>							
Labelled coffee	2.3	1.7	2.0	0.4	n/a	1.0	2.0
Labelled tea	2.1	no	< 1.0	n/a	n/a	2.0	0.5
Labelled bananas	2.3	4.0	0.9	5.0	n/a	n/a	0.5

Italy	Luxembourg	The Netherlands	Norway	Portugal	Spain	Sweden	Switzerland	United Kingdom	TOTAL
9	direct	27	1	1	12	4	7	60	200 +
500	6	412	n/a	9	95	35	300	100	2,854 +
4,000	80	3,100	4,000	no	n/a	n/a	2,500	3,100	56,700 +
n/a	n/a	1,810	n/a	11	850	300	20	5,000	19,300 +
4,500	90	5,320	4,000	20	1,090	340	2,820	8,200	78,900 +
128.0	no	82.4	n/a	0	26	10.0	43.9	237.0	851 +
0.5	no	17.1	no	no	1	2.0	3.4	0.5	107 +
n/a	2.4	7.2	3.5	no	2	5.0	15.8	18.3	113 +
128.5	2.4	106.7	3.5	0	29	17.0	63.1	245.8	1,071 +
41,165	no	20,643	n/a	92	7,897	2,188	15,655	59,556	243,300 +
n/a	800	30,340	no	294	12,262	728	1,980	10,401	103,100 +
20,000	2,000	35,000	4,540	no	no	5,480	136,028	206,289	597,000 +
210	no	104	n/a	2	252	41	157	8,496	11,400 +
n/a	8	320	no	5	no	46	13	20	1,700 +
n/a	100	325	108	no	no	n/a	486	1,453	5,100 +
210	108	749	108	7	252	87	656	9,969	18,300 +
TransFair	TransFair-Minka	Max Havelaar	Max Havelaar	no	FAIRTRADE/Com. Justo	FAIRTRADE	Max Havelaar	FAIRTRADE Mark	
n/a	39		21	no	11	15	31	178	590 +
n/a	n/a		1.0	no	no	< 1.0	6.0	20.0	
n/a	n/a		0.3	no	no	< 1.0	5.0	0.5	
n/a	n/a		1.5	no	no	< 1.0	47.0	0.5	

# ANNEX 3 EXPLANATIONS RELATING TO THE SUMMARY TABLES

All data show well-documented minimum figures.

As part of the information is not available, the real figures are higher.

n/a: not available or not applicable

## 1. IMPORTING ORGANISATIONS

The number of importing organisations is given according to the information at hand.

## 2. RETAIL CHANNELS

a) The number of **Worldshops** has been checked with the national association and cross-checked with the figures of the largest national importer(s), who, as a general rule, supplies all those shops. The number of Worldshops provided here comprises all Worldshops, i.e. those which are members of NEWS! and those which are not. Nevertheless the use of the term "Worldshop" is not always consistent, neither on national levels, nor on international level, the minimum requirement being a fixed location with an address. In some countries "Worldshop" implies a minimum number of opening hours per week, in others it doesn't. In certain countries it means a very high percentage of Fair Trade products, in other countries or shop schemes Fair Trade may only be a small part of the assortment. Thus what is called "Worldshop" in one country, might not necessarily qualify for the same definition in another.

b) The number of **supermarkets** has been taken from the information provided by the labelling organisations on the number of outlets where Fairtrade labelled products may be bought. Care has been taken to make sure that this figure does not include the Worldshops of that country.

c) The category **others** describes all kind of other sales outlets that are neither Worldshops nor supermarkets. The variety of this group covers independent commercial stores, gift shops, etc. plus irregularly attended stalls, local representatives or so-called action groups that might be active and selling only once or twice a year.

d) The number of **total sales outlets** is the sum of the three categories: Worldshops, supermarkets and others. This figure gives a rough idea on the density of the Fair Trade net, at its best. Care has been taken in order to avoid double counting wherever possible. The figures given are very often the minimum number.

## 3. PAID STAFF

Figures are given in full-time equivalents for the importing organisations, the Worldshops associations (as an organisation) and the labelling organisations. The total of these three categories is also given.

The figures referring to the importing organisations are mostly minimum figures, as generally speaking exact data have only been available for the largest importing organisation(s).

## 4. TURNOVERS, IN 000 €

a) Under **importing organisations** the total turnover of all those organisations that have responded to the questionnaire is given. The list of the respondents appears in Annex 1. In nearly all cases this is the minimum figure for that particular country.

b) The net retail turnover of the **Worldshops** is the final consumer price minus the VAT, given for those Worldshops that are members of the national association.

c) The net retail value under the **labelling organisation** gives an estimate by the labelling organisation as to the value of all products sold under its label in its national territory.

## 5. EDUCATION / PR / MARKETING, IN 000€

This gives the budget for education / PR / marketing for those importing organisations where the data are available, for the national Worldshops associations and for the national labelling organisations, where applicable and available. The total of the three sums is also given. All figures under 4. and 5. are given in thousands of Euros (000 €).

## 6. MARKET SHARES

This is information provided directly from the labelling organisations. All data were collected between April and November 2005 and give the latest available figures.

# ANNEX 4 INTERNATIONAL MEMBERSHIP LISTS

October 2005

**Note:** In countries not listed in this annex no organisation has so far become a member of one of the international Fair Trade networks

PART 1	FLO	IFAT	NEWS!	EFTA
<b>Austria</b>	• FAIRTRADE Austria	• EZA Fairer Handel	• ARGE Weltläden	• EZA Fairer Handel
<b>Belgium</b>	• Max Havelaar Belgium	• Citizen Dream • Oxfam-Magasins du monde • Oxfam-Wereldwinkels	• Oxfam-Wereldwinkels	• Oxfam-Wereldwinkels • Oxfam-Magasins du monde
<b>Denmark</b>	• Max Havelaar Danmark		• Fair Trade Danmark	
<b>Finland</b>	• Reilun kaupan edistämisyhdistys ry	• Tampereen Kehityskauppa	• Finnish Association of Worldshops	
<b>France</b>	• Max Havelaar France	• ALTER ECO • Artisanat SEL • Fédération Artisans du Monde • Solidar'Monde • Boutic Ethic • Plate-Forme pour le Commerce Equitable	• Fédération Artisans du Monde	• Solidar'Monde
<b>Germany</b>	• TransFair e.V.	• CONTIGO Fair Trade Group • dwp mensch + zukunft eG • EL PUENTE GmbH • gepa Fair Handelshaus • IFOAM: Int. Fed. of Organic Agriculture Movements (associate member) Network of European World Shops • TopQualiTea	• Weltladen-Dachverband e.V.	• gepa Fair Handelshaus
<b>Ireland</b>		• Fairtrade Mark		

PART 2	FLO	IFAT	NEWS!	EFTA
<b>Italy</b>	<ul style="list-style-type: none"> <li>• TransFair Italy</li> </ul>	<ul style="list-style-type: none"> <li>• Commercio Alternativo</li> <li>• Cooperativa Chico Mendes</li> <li>• Ctm Altromercato</li> <li>• Equo Mercato</li> <li>• EQUOLAND</li> <li>• Libero Mondo</li> <li>• ROBA dell'Altro Mondo</li> </ul>	<ul style="list-style-type: none"> <li>• Associazione Botteghe del Mondo</li> <li>• Ctm Altromercato</li> </ul>	<ul style="list-style-type: none"> <li>• Ctm Altromercato</li> </ul>
<b>Luxembourg</b>	<ul style="list-style-type: none"> <li>• TransFair-Minka</li> </ul>			
<b>Malta</b>		<ul style="list-style-type: none"> <li>• Koperattiva Kummerc Gust (KKG)</li> </ul>		
<b>Netherlands</b>	<ul style="list-style-type: none"> <li>• Stichting Max Havelaar</li> </ul>	<ul style="list-style-type: none"> <li>• AgroFair Benelux</li> <li>• Barbosa do Brasil</li> <li>• De Evenaar</li> <li>• Discovery Interior Trading</li> <li>• European Fair Trade Association</li> <li>• Fair Trade Organisatie</li> <li>• Nederlandse Importeurs Vereniging Alternatieve Handel</li> <li>• OIKOCREDIT</li> <li>• Stichting Goed Werk</li> <li>• Stichting Sawa Hasa</li> </ul>	<ul style="list-style-type: none"> <li>• Landelijke Vereniging van Wereldwinkels</li> </ul>	<ul style="list-style-type: none"> <li>• Fair Trade Organisatie</li> </ul>
<b>Norway</b>	<ul style="list-style-type: none"> <li>• Max Havelaar Norway</li> </ul>			
<b>Portugal</b>			<ul style="list-style-type: none"> <li>• Coordenação Portuguesa de Comércio Justo</li> </ul>	
<b>Spain</b>	<ul style="list-style-type: none"> <li>• Asociación del Sello de Productos del Comercio Justo</li> </ul>	<ul style="list-style-type: none"> <li>• Alternativa 3</li> <li>• Iniciativas de Economía Alternativa y Solidaria (IDEAS)</li> <li>• Intermón Oxfam</li> <li>• Solidaridad Internacional</li> </ul>	<ul style="list-style-type: none"> <li>• Coordinadora Estatal de Comercio Justo</li> </ul>	<ul style="list-style-type: none"> <li>• Intermón Oxfam</li> <li>• Iniciativas de Economía Alternativa y Solidaria (IDEAS)</li> </ul>

	FLO	IFAT	NEWS!	EFTA
<b>Switzerland</b>	<ul style="list-style-type: none"> <li>• Rättvisemarkt</li> </ul>	<ul style="list-style-type: none"> <li>• La Maison Afrique AB</li> <li>• North &amp; South Fair Trade AB</li> <li>• Rättvis Handel Import AB</li> <li>• Sackeus AB</li> </ul>	<ul style="list-style-type: none"> <li>• Världsbutikerna för Rättvis Handel</li> </ul>	
<b>United Kingdom</b>	<ul style="list-style-type: none"> <li>• Max Havelaar-Stiftung</li> </ul>	<ul style="list-style-type: none"> <li>• Caritas Schweiz Fairness Handel</li> <li>• claro fair trade gebana ag</li> <li>• Fairtrade Village</li> </ul>	<ul style="list-style-type: none"> <li>• claro fair trade</li> <li>• Association Romande des Magasins du Monde</li> </ul>	<ul style="list-style-type: none"> <li>• claro fair trade</li> </ul>
	<ul style="list-style-type: none"> <li>• The Fairtrade Foundation</li> </ul>	<ul style="list-style-type: none"> <li>• Bishopston Trading Company</li> <li>• Bookchair Company Ltd</li> <li>• British Association for Fair Trade Shops</li> <li>• Cafédirect Ltd</li> <li>• Day Chocolate Company</li> <li>• Equal Exchange Trading Ltd</li> <li>• One World Shop</li> <li>• Oxfam GB</li> <li>• Oxfam Ireland/Northern Ireland</li> <li>• PhytoTrade Africa</li> <li>• Shared Earth</li> <li>• Shared Interest</li> <li>• Tearcraft</li> <li>• The Body Shop Foundation (associate member)</li> <li>• Traidcraft Exchange</li> <li>• Traidcraft Plc</li> <li>• Tropical Forest Products Ltd</li> <li>• FM Foods/Tropical Wholefoods</li> <li>• Twin Trading</li> </ul>	<ul style="list-style-type: none"> <li>• British Association for Fair Trade Shops</li> </ul>	<ul style="list-style-type: none"> <li>• Traidcraft PLC</li> </ul>

## ANNEX 5 | METHODOLOGICAL REMARKS

Information from the questionnaires was used to write a first draft of the different chapters, which were then revised against other available background information, like books and brochures, annual reports, product leaflets, etc. The Internet helped as a valuable source of information, since most of the organisations run extensive websites (see Annex 1 for the website/address list) and an abundance of material is available online.

This first draft was submitted for comments to the Fair Trade Advocacy Office and to the managers of FLO, IFAT, NEWS! and EFTA. The country chapters were sent to resource persons in the different countries for comments. Based on feedback received the final draft was then concluded.

### A WORD OF CAUTION

As a result of the limited manpower available to many of the Fair Trade organisations which are the subjects of the survey, it is not always easy to acquire up-to-date, precise, accurate, and comparative figures within the sector. There is, therefore, much scope for guesswork, and the resulting estimates should not be mistaken for facts. This is particularly

true for some of the Worldshops associations, although the situation differs greatly from one country to another.

Another source of uncertainty is that definitions and categories are not always used very consistently (for more details see also Annex 3).

Bearing these factors in mind, figures have been double-checked, and when figures from different sources varied a lot, the lower of the figures was always used (to obtain robust minimum estimates).

A shortage of detailed data makes it difficult to compile precise aggregate Fair Trade turnover figures. Consequently, multiple counting of the same product cannot always be recognized and taken adequately into account. Multiple accounting occurs, for example, when national figures for the turnover of a product might include both wholesaler and retailer figures. It also happens when sales figures of different importers are summed, if they happen to sell to each other within their country or internationally. A degree of caution is therefore necessary, when it comes to evaluating highly aggregate turnover figures.



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Brussels, December 2005



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With growth rates of more than 20% every year  
since the beginning of the 21st century,  
fairly traded products have left the “niche market”  
and are entering more and more into the mainstream.  
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about the structure and the market  
of Fair Trade in 25 European countries.  
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