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# The evolution of the Fair Trade organisational landscape in France and in Belgium

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# L'évolution du paysage organisationnel du commerce équitable en France et en Belgique

**Benjamin HUYBRECHTS**

**Abstract**

Parallel to the dramatic growth of its sales and public awareness, the Fair Trade movement has seen its organisational landscape become increasingly diversified. While Fair Trade nonprofit pioneers were initially relatively homogeneous in terms of goals and structures, the economic development of the initiative, driven by the sales of Fair Trade products in mainstream distribution channels, has led to the emergence of a multitude of new actors with much more heterogeneous behaviours – in spite of the general trend towards a stronger market orientation – (Gendron, 2004; Moore, 2004; Nicholls & Opal, 2005; Renard, 2003). When observing the evolution of Fair Trade organisations (FTOs), i.e., organisations claiming to be totally dedicated to Fair Trade, three trends can be observed: Fair Trade pioneers have adopted more business-oriented profiles and more complex and specialised organisational structures; New small Fair Trade businesses have emerged with a stronger economic specialisation on a particular product or distribution channel ; « Old » and « new » FTOs increasingly gather into networks with two types of purposes: to promote Fair Trade and to have a minimum political representation (advocacy networks) and to face common socio-economic challenges (socio-economic networks). The goal of this contribution is to analyse these three trends with the help of a sample of nearly fourty FTOs in Belgium and in the French Rhône-Alpes region. We can thus illustrate the three trends on the basis of both general observations and precise examples. We also try to compare the two regions and to explore to what extent the evolution of FTOs reveals more global trends within the Fair Trade movement.

**Résumé**

Parallèlement au développement important de ses ventes et de sa notoriété, le mouvement du commerce équitable a vu son paysage organisationnel se diversifier de plus en plus au cours des dernières années. Alors que les pionniers du mouvement, principalement des associations, apparaissaient relativement homogènes en termes d'objectifs et de structuration, le développement économique du secteur, notamment stimulé par la grande distribution, a été accompagné par une multiplication des acteurs et de leur hétérogénéité – malgré une tendance générale à l'accentuation de la dynamique commerciale. En observant l'évolution des organisations de commerce équitable (OCE), c'est-à-dire les organisations qui affirment être totalement engagées dans une démarche de commerce équitable, trois tendances peuvent être observées : les pionniers du mouvement adoptent des profils plus commerciaux et des structures organisationnelles plus complexes et plus spécialisées : de nouvelles petites entreprises de commerce équitable émergent en ciblant davantage un produit ou un canal de distribution particulier ; les « anciennes » et « nouvelles » OCE collaborent de plus en plus au sein de réseaux ayant deux types de finalités : d'une part, promouvoir le commerce équitable et fournir une représentation politique minimale aux acteurs; d'autre part, chercher à faire face aux défis socio-économiques communs. L'objectif de cette contribution est d'analyser ces trois tendances à l'aide d'un échantillon de quarante OCE en Belgique et dans la région Rhône-Alpes. Nous pouvons ainsi illustrer les trois tendances sur la base d'observations générales ainsi que d'exemples précis. Nous tentons enfin de comparer la structuration du mouvement dans ces deux régions et d'analyser dans quelle mesure l'évolution des opérateurs est révélatrice de tendances plus globales du mouvement.

# 1. Introduction

Parallel to the dramatic growth of its sales and public awareness, the Fair Trade movement has seen its organisational landscape become increasingly diversified (Wilkinson, 2007). While Fair Trade nonprofit pioneers were initially relatively homogeneous in terms of goals and structures, the economic development of the initiative, driven by the sales of Fair Trade products in mainstream distribution channels, has led to the emergence of a multitude of new actors with much more heterogeneous behaviours – in spite of the general trend towards a stronger market orientation – (Gendron, 2004; Moore, 2004; Nicholls & Opal, 2005; Renard, 2003). When observing the evolution of Fair Trade organisations (FTOs), i.e., organisations claiming to be totally dedicated to Fair Trade, three trends can be observed:

- Fair Trade pioneers have adopted more commercial-oriented profiles and more complex and specialised organisational structures.
- New small businesses emerge with a stronger economic specialisation on a particular product or distribution channel.
- « Old » and « new » FTOs increasingly gather into networks with two types of purposes: to promote Fair Trade and have a minimum political representation (advocacy networks) and to face common socio-economic challenges (socio-economic networks).

The goal of this contribution is to analyse these three trends with the help of a sample of nearly fourty FTOs in Belgium and in the French Rhône-Alpes region. This paper is divided into six sections, including the present introduction and the conclusion. Part 2 describes our sample of FTOs, how we have defined and selected these FTOs and how the field study has been conducted. Part 3 then focuses on the evolution of the pioneer actors (first trend), while part 4 describes the emergence of new actors with different foci (second trend). The interactions among old and new actors, their networking initiatives and the new organisational landscape emerging from this (third trend) are presented in part 5. Part 6 concludes and considers some implications for both the field actors and the academics.

## 2. Sample and methodology

Our empirical material is provided by two field studies led in 2007 in Belgium and in the French region of "Rhônes-Alpes". The reasons for choosing a particular region in France are (1) the very high number of FTOs in this country (more than 250 according to the "Plate-Forme pour le Commerce Equitable"), (2) the wide geographical area which would have caused many travels and (3) the fact that a similar study was being conducted simultaneously in the central "Ile-de-France" region, making it difficult to ask FTOs in that region to ask for a second interview in the same period.

In both Belgium and Rhône-Alpes, lists of "100% Fair Trade"[1] importers or distributors have been obtained through local Fair Trade support structures: the "Fair Trade Centre" in Belgium (www.befair.be) and "Equisol" in Rhône-Alpes (www.equisol.org). As there is no legal definition of what a "Fair Trade organisation" is, the appearance of an organisation on a "peer-recognised list"[2] has been considered as a necessary (and sufficient) selection criterion. All the organisations listed by the mentioned support structures and located within the two areas (four departments in the Rhône-Alpes region and all provinces in Belgium) have been contacted by e-mail. Only the FTOs which have replied are present in our sample, which obviously causes some bias. However, the proportion of the sample with regard to the total listed population (52% in Rhône-Alpes[3] and 80% in Belgium[4]) allows considering our results, if not totally representative, at least greatly indicative of the trends in the sector. Moreover, the diversity of FTOs in our sample seems to reflect the diversity of the whole sector, including for instance both old and new FTOs, both importers and distributors, working with both food and non-food products.

The semi-structured interviews on a high number of organisations (with regard to the size of the sector) provide both quantitative survey results (e.g. resources, age or size) and rich qualitative insights (in terms of entrepreneurial dynamics, goals, governance

[1] I.e., organisations dealing with products the majority of which are either labelled or self-declared as respecting the international Fair Trade definition by FINE in 2001.
[2] Even though the two support structures are not representative networks of FTOs, they play a major role in the structuration of the field and it is reasonable to assume that the organisations included in their lists are accepted – at least tacitly – as FTOs by their peers.
[3] 24 interviewed FTOs on a total of 46 on the departments of Ardèche, Drome, Isère and Rhone.
[4] 16 interviewed FTOs on an approximate total of 20, including 2 FTOs which have gone bankrupt after the interviews.

structures,…) which will now allow us exploring the three trends presented in the introduction.

## 3. Increased professionalism of Fair Trade pioneers

Fair Trade pioneers are FTOs from the "first Fair Trade wave", which have emerged in the 1970s and 1980s (Diaz Pedregal, 2007; Lemay, 2007; Raynolds & Long, 2007) and represent one third of or sample (14 FTOs). They are the first actors on the market and often propose a wide range of food and non-food products. They are mainly nonprofit organisations (Becchetti & Huybrechts, 2007; Huybrechts, 2007), some of which have started as NGOs and keep strong roots in the civil society (Poncelet *et al.*, 2004). The best known examples of Fair Trade pioneers in the two areas are Artisans du Monde in France and Oxfam (Magasins du Monde for craft and Wereldwinkels for food) in Belgium, which have developed wide networks of specialised outlets ("worldshops"). Beyond these famous initiatives, other smaller pioneers are still active in Fair Trade, such as Ayllu and Aux 4 coins du Monde in Rhône-Alpes or Miel Maya, Fair Trade Organisatie and Sjamma in Belgium.

However, Fair Trade pioneers have evolved in many aspects to adapt to the evolution of the market. The main and most challenging evolution has been the introduction of Fair Trade-labelled products in the supermarkets, or "Fair Trade mainstreaming" (Moore, 2006), which can be considered as a "second Fair Trade wave" (Lemay, 2007; Nicholls & Opal, 2005). Whereas many fears have initially emerged that supermarkets would constitute an important threat for Fair Trade pioneers, it appears that competition among the two types of actors has remained limited, both in Belgium and in Rhône-Alpes. According to the interviewed managers, there are three reasons for this.

First, the total Fair Trade market has kept growing, even outside the supermarkets, so that pioneers have also benefited the growing interest of consumers for Fair Trade (Krier, 2005). Second, managers have often reported – and several studies (e.g. Becchetti & Rosati, 2005) have shown – that the consumers' profiles are quite different in the worldshops and in the supermarkets: the former's are "social activists" or at least politically sensitised consumers, whereas the latter's are closer to mainstream

consumers. As a result, there seem to have been few consumers' transfers from worldshops to supermarkets. Third, some pioneers have been actively involved in Fair Trade mainstreaming through the distribution of their own products in the supermarkets. Such strategy has been adopted by Oxfam-Wereldwinkels in Belgium, resulting in a huge growth for this FTO. Products sold by Oxfam under the "Oxfam Fair Trade" brand, both in worldshops and in supermarkets, have given a higher notoriety to the "Oxfam" name than to the "Max Havelaar" Fair Trade label (IDEA Consult, 2004). Artisans du Monde in France, however, has not been directly involved the mainstreaming movement and has known a much slower growth, allowing supermarkets or other FTOs addressing the mainstream consumers.

Whatever the involvement in Fair Trade mainstreaming, pioneers have had to adapt to the evolution of the market. This has been translated into major evolutions in their organisational architecture. The scenario chosen by many pioneers has been to split or at least to clearly distinguish the economic, social and socio-political dimensions of their activity. Artisans du Monde, Miel Maya and Oxfam-Wereldwinkels have created a separate commercial company to handle the trading activity, keeping the social (producer support) and political (education and advocacy) functions in a nonprofit structure – the latter having the majority of shares of the former –. The organisational architecture of these "Fair Trade groups" is often complex and varies along the cases, with beside crossed participations in each partner's capital, the maintaining of common boards of directors or of a common manager. Oxfam-Magasins du Monde has not created a separate company, but has isolated the trading activity in its accounts in order to evaluate it separately and make it self-sustainable. Other smaller pioneers, however, have remained with the same structure but with an increased professionalism.

The move towards professionalism is a common preoccupation of all the interviewed pioneers, even though such term can have different meanings. For some worldshops, it has meant hiring employees and reducing the proportion of volunteers in their workforce (Krier, 2005). For others, it has meant improving the quality of the products or reorganising their commercial strategy dramatically. Most interviewed FTOs report an increase in the proportion of sales towards their total incomes.

In spite of their evolution towards a more commercial profile, pioneers distinguish themselves from incomers – which we will explore in the next section – on several aspects. First, they have all chosen (even partially) a nonprofit or a co-operative legal form. Most pioneers' directors report that this choice was considered as evident in that period. Some consider that they would do differently if they had to start a new organisation now. Second, most pioneers have a wider (and more traditional) product assortment than newcomers: most worldshops and importers handle both craft and food products. Third, resources are often diversified and include non-commercial resources such as public subsidies (especially in Belgium) and voluntary work. If the working hours of volunteers in pioneer FTOs from our sample were to be paid[5], we have calculated that they would count for approximately half of their resources.

## 4. Emergence of new actors

After 2000, many new organisations have appeared in the import and/or distribution of Fair Trade products (two thirds of the FTOs of our sample; nearly half of our total sample is even born after 2004). This constitutes what we call a "third Fair Trade wave", probably more discrete and less debated than Fair Trade mainstreaming, but certainly as important for the shaping of the sector. Even though there is a strong diversity among these new Fair Trade initiatives, we can point at several features which distinguish them from their pioneer counterparts (apart, obviously, from their age).

The first major difference is that many of these FTOs have been created by idealistic entrepreneurs who have a business background, contrarily to the often social activist background of most pioneers' founders. The new Fair Trade entrepreneurs have often set up a partnership with one or several producers groups from a particular region after a travelling or a humanitarian experience. Compared to pioneers, new FTOs are rarely created by a group of people but rather by an individual (e.g. Sol'Alter and Vinomundo), a couple (e.g. Citizen Dream and Karawan) or a family (e.g. Saldac).

[5] By this, we do not claim that volunteers should be paid nor that their contribution has only an economic value. We just want to show to what extent voluntary work is a valuable – albeit decreasing – resource for pioneer FTOs. For our calculation, mean salaries of the nonprofit sector have been used and updated (Lefèbvre & Mertens, 2001).

Coherent with this, it appears that nearly all newcomers have traditional business forms ("société anonyme" in both countries, "SPRL" in Belgium and individually owned companies). A few number of newcomers have chosen the nonprofit (SGAP and Souffle de l'Inde in Rhône-Alpes) or co-operative form (Emile in Belgium, Ethiquable Gourmand and Soli'gren in France). All the other new FTOs have business forms and most managers claim that it is a deliberate choice to prove their professionalism and commercial – albeit fair – purpose.

Linked to the business form, most new FTOs rely only on commercial resources, contrarily to the pioneers. Refusing public subsidies, private gifts or voluntary work is even, for many of these FTOs, a proof professionalism. This is one of the most commonly heard claims, sounding like "*we want to show that it is possible to do Fair Trade with a sustainable business model, functioning without any external support*". In Rhône-Alpes, Fair Trade businesses have benefited from some public support but only to the same extent as what is available for all small new businesses.

Another common feature of newcomers is the specialisation on a particular product, product range or distribution channel. Whereas pioneers often keep proposing wide product assortments, newcomers, especially importers, are much more focused. Particular products can be T-shirts (Laspid and Quat'rues), chocolate (Delvas and Sol'Alter) or wine (Vinomundo). Other FTOs propose different products but from the same range (gadgets for Signaléthique or cosmetics for Karawan) or from the same country (Indian craft for Souffle de l'Inde, Palestinian products for SGAP, Latin-American food for Saldac,…).

Another possible specialisation process lies in the distribution channel. New Fair Trade distributors try, indeed, to investigate channels which are covered neither by worldshops nor by supermarkets. The most striking examples are corporate gifts (Signaléthique and Ethic Store) and Internet sales (Equomondo, Ethic Store, the T-shirt FTOs,…). Of course, some newcomer FTOs still open generalist shops with no such strong focus (e.g. L'épicerie equitable or Au cabanon equitable in Lyon). However, even then, there is often an intent to differentiate oneself from traditional worldshops, for instance by

choosing a professional layout able to attract the people "*not because it is Fair Trade but because the products are high quality and interesting*".[6]

Among Fair Trade newcomers, heterogeneity is strongest when it comes to political action (e.g. education and advocacy). All the interviewed managers consider that this is a part of the Fair Trade project which is important. However, contrarily to most pioneers, few newcomers concretely conduct education and advocacy activities. The main reason sounds like this: "*we would like to but we don't have the time, and others do it much better than we would*". This doesn't mean that newcomers are not sensitive to political issues surrounding Fair Trade. However, instead of devoting organisational resources to these issues, they often delegate the advocacy role to regional or national networks, for instance for representing them in the preparation of the Fair Trade law.[7] In France, a country where the debates around Fair Trade are stronger than anywhere else, typically concerning mainstreaming, the most politically involved companies are the ones of the "Minga" network (e.g. Saldac and D'ici et de là-bas in Rhône-Alpes). Finally, when advocacy is done, it is often separated from the commercial activity. For instance, the two FTOs working with T-shirts(Laspid and Quat'rues) both have, beside their official website, a more informal blog in which they can express political point of views.

# 5. New landscape and networking

Both pioneer and newcomer FTOs are increasingly joining together in networks. Whereas national networks are famous (e.g. Artisans du Monde and Minga in France), there are also a number of local networks aiming a particular region or city (Lyon – the "Clace" – and Grenoble). Specific structures support such networking. In Belgium, the public structure "Fair Trade Centre" has, among its several missions, to promote collaboration among FTOs. In Rhône-Alpes, "Equisol" is a major catalyst for networking. Such networking certainly contributes to giving a new shape to the Fair Trade sector. In our view, networks are created to fulfil two types of purposes, sometimes jointly.

[6] Words of the founder of Citizen Dream, a Belgian FTO which has gone bankrupt but whose example is often quoted in Belgium as the typical vision of the "third Fair Trade wave".
[7] A law on Fair Trade has been voted by the French parliament. In Belgium, three law proposals have been issued by political parties and should be debated in the course of 2008.

First, advocacy networks gather FTOs that have a common conception of Fair Trade but without necessarily working together on the economic side. The goal of such networks is to conduct advocacy based on certain claims related to Fair Trade. For instance, the already mentioned French network "Minga" is opposed to the mainstreaming of Fair Trade and is in favour of including local trading relationships under the name "Fair Trade". This vision of Fair Trade has been advocated, for instance, during the preparation of the French law intended to define Fair Trade (Diaz Pedregal, 2007).

Second, FTOs create formal or informal "socio-economic" networks. The main reason for such networks lies in the common economic difficulties faced by most FTOs. Indeed, even if the demand for Fair Trade products continues to grow – though less rapidly than in the last years –, the economic constraints inherent to the Fair Trade criteria are heavy, especially for smaller FTOs. The prefinancing of part of the orders to the producers in the South puts a particular pressure on the treasury. More generally, the fact of working with small and sometimes less skilled producers brings regular problems of quality and delays. A majority of the interviewed importers complain about delay problems. Finally, with the growing number of FTOs, there is more competition than before, albeit "soft" competition.

The economic pressure is even stronger for FTOs dealing with craft products. Therefore, it is no wonder that, in Belgium, FTOs active with craft products have decided to meet in order to think of common solutions to overpass the difficulties linked to this type of products. This informal gathering could lead to the creation of a common quality agency in the South and of a common logistic platform to manage transport and stocks for these FTOs. Equisol is coordinating a similar project of platform near Lyon, with the help of local authorities.

Other more informal economic networks include multilateral collaborations among FTOs performing different economic functions. Typically, a distributor and an importer develop a common product strategy, or a transforming FTO builds alliances with product-related importers (for instance an FTO printing T-shirts negotiates with another FTO importing textiles). Most interviewed managers acknowledge they will probably increase such collaborations as the economic situation becomes more difficult.

Many networks combine in fact political and economic functions. This is the case for most local networks gathering FTOs in a particular city or region. In Rhône-Alpes, the cities of Lyon and Grenoble provide striking examples of local networks which gather the quasi-totality of FTOs, whatever their type, size or affiliation. Such networks are intended to promote Fair Trade on a local basis, which implies both economic and political dimensions. Typically, the organisation of trade fairs (very common during the Christmas period) allows the different FTOs exposing their products but also advocating together for Fair Trade. Local networks often play the role of common interlocutor in front of partners, particularly public authorities able to support Fair Trade both economically (through public purchases of Fair Trade products) and socio-politically (through legislation or public funding for educational purposes).

In both economic and political networks, even when all the actors of an area are involved, it is striking to observe that small FTOs, especially newcomers which do not belong to an already existing national network (such as Minga or Artisans du Monde in France), are more in demand of such networking processes and thus participate more actively to them. When asked why they do so, managers of "small non-affiliated newcomers" express the need of peer-recognition as a motivation to networking ("*we want to be part of the movement*") but also a need to collaborate to face common challenges. While some of them dream of strong collaborations (for instance organising joint imports or developing joint products), most agree on the minimum challenge to increase consumers' and governments' awareness to Fair Trade.

In fact, we can consider that networking is a process through which FTOs (especially smaller ones) focus on their "core business" while being represented politically or reinforced economically.

# 6. Conclusion

The Fair Trade landscape has evolved towards more diversity and more complexity. In the 1990s, academics mentioned a civil society initiative carried by mainly nonprofit and politically active organisations considered close to NGOs (some of which having a history of traditional NGOs). Then, with the development of labelling, allowing the

distribution of Fair Trade products in mainstream markets, most authors have described (and still do so) the Fair Trade movement as being composed of two wings: one the one side, an "integrated" channel of NGO-like importers selling non-labelled products through worldshops, and on the other side, a "labelled" channel of mainstream businesses selling through supermarkets. At an international level, the first vision being carried by IFAT and the second by FLO.

While this distinction can still be accurate in some contexts (for instance in Italy), our field study in Belgium and in the French Rhône-Alpes region has shown that the Fair Trade landscape is now more complex than this "two-wing" vision and that FTOs cannot be put into one single box. First, Fair Trade pioneers have evolved towards an increased professionalism. Most of them have increased their paid staff and their proportion of commercial resources, importers diversify their distribution channels and are sometimes selling their own-branded products through supermarkets. The example of Oxfam Fair Trade in Belgium, selling both through worldshops and through supermarkets, shows that the frontiers between the integrated and labelled channels, when they still exist, are increasingly blurring.

The "second wave" of newcomer FTOs, consisting in a variety of small businesses specialised in a particular product or distribution channel, appears different from both pioneers and labelled mainstream businesses. While these two types of players are sometimes opposed as the respectively political and commercial extremes of the Fair Trade spectrum, new FTOs seem to bridge the dichotomy with a rather pragmatic approach. Even though there is a wide variety among them, newcomers are characterised by a strong market orientation combined with a close relationship with producers. As far as political dimensions are concerned, newcomer FTOs often do not conduct them internally but delegate them to local or global networks.

Networking is precisely the third trend we have explored. Both pioneer and newcomer FTOs seem to collaborate increasingly, either for exploring possible economic partnerships or for jointly promoting Fair Trade, particularly towards consumers and public authorities. Local networks often gather the totality of FTOs in an area, thereby bypassing the distinctions observed at a higher level (for instance, in France, among

Minga, Artisans du Monde and Max Havelaar networks). They allow FTOs, especially the smaller ones, to be part of the movement and to delegate dimensions which they find important but cannot handle internally (for instance raising citizens' awareness).

Finally, when comparing the two regions, our field study shows that the first trend in mainly observed in Belgium, where medium and large pioneers still dominate the sector and new businesses have emerged only recently. In Rhône-Alpes, on the contrary, we see a strong dynamics of Fair Trade thanks to a multitude of new small businesses specialised on one particular product or distribution channel. Local networks are very active there to promote Fair Trade and to provide a minimal political representation to these multiple operators. In Belgium, networking processes are emerging more slowly and rather on the economic dimension, to face common challenges (mainly in craft).

Our study obviously includes a number of limitations. We have based our observations on two particular regions in Europe and do not pretend to have provided a picture which reflects the situation of the whole Fair Trade movement. Nevertheless, other studies made elsewhere, for instance the PICRI study in Ile-de-France and two field studies we are preparing in Italy and the United Kingdom, seem to go more or less in the same way, in spite of the specific context of each country. It should also be mentioned that the local networks and support structures in the two areas have provided an enthusiastic feed-back to our observations. The second limitation lies in our methodology. Indeed, the high number of cases did not allow in depth-studies or a crossing of the managers' point of views with other persons' in each FTO.

In spite of the weaknesses of our methodology, we would like to draw the attention on two of its strengths which could be useful for future research. First, with the increased diversity of the Fair Trade landscape which we have tried to document, it appears that it could be dangerous to deduce general considerations on FTOs of Fair Trade based on one particular example. What can be said for an FTO is not necessarily true for another one, especially when witnessing very different types of FTOs. The same remark has in fact been made for the study of producers in the South, which are far from constituting a homogeneous group either (Lemay, 2007). The second observation linked to the first one is that case studies are often made one the biggest and most famous FTOs (e.g.

Cafédirect, Traidcraft, Artisans du Monde, Oxfam,…). Focusing only on these organisations would lead to a biased vision of Fair Trade operators, which would not include the smaller and newer organisations. Our article has tried to also include these less famous Fair Trade initiatives thanks to a local approach, thus contributing to a better knowledge of the diversified and rapidly evolving Fair Trade sector.

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