

Fair trade in Europe

Facts and figures
on the fair trade sector
in 16 European countries

February 1998

The present survey is a publication of the Fair Trade Association (EFTA), a network of twelve fair trade organisations in nine European countries.

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1. Introduction

- This survey of fair trade in Europe was carried out at the request of the European Fair Trade Association (EFTA). Its objective is to provide an updated version of the overview published in 1995, which was an initial attempt to provide a comparative picture of the extent and impact of the fair trade movement in Europe as well as the fair trade labelling initiatives on the European mainstream market. The present survey concentrates on two categories in fair trade:
- Goods imported and sold by the alternative trading organisations (ATOs) according to fair trade criteria, largely sourced from small-scale producers;
- Goods imported and sold commercially, with a trademark indicating that the conditions of trade for these products have been approved by an independent organisation as meeting their fair trade criteria and standards.

In addition to these categories, the European market sees an increasing number of wholesalers and retailers who claim to trade fairly without any guarantees or monitoring. As verification of these claims is impossible, this type of trader has not been included in this report.

The present study covers 16 European countries: Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Luxembourg, Netherlands, Norway, Spain, Sweden, Switzerland and the United Kingdom.

2. Survey methodology

The report consists of 16 country-wide reports of the state of affairs in fair trade and is summarised by information on a European level, containing key data from each country.

For each country various fair trade organisations were identified, including importers, networks of World Shops and national labelling initiatives, almost 100 organisations in total. The EFTA secretariat provided initial European level information, which was extended during the course of the survey. A questionnaire, partially tailored to the various kinds of fair trade actors (importers, distributors, labelling initiatives), was sent to the fair trade organisations identified in the earliest phase. Where necessary, the collection of data was completed by telephone interviews and requests for additional information. The information gathered at organisational level was then collated into individual country reports which were double checked with the leading organisations in each country. The study is based on feedback from 42 organisations. A big thank you goes to all the people who have contributed their time and patience to the development of this survey.

The survey covers: fair trade importers which are current members of the International Federation of Alternative Trade (IFAT) or subscribe to the IFAT Code of Practice; members of the Network of European World Shops (NEWS) and labelling initiatives which are members of the Fairtrade Labelling Organisations (FLO). The list of addresses provided in the annex to this report gives details of EFTA members, NEWS members, FLO members and all ATOs that replied to the questionnaire.

Because the survey covers a great variety of organisations within different cultural contexts, some degree of standardisation both in the collection of data and in the measurement of indicators was needed. Sadly, perhaps, the final result does not give a full picture of the richness and complexity of highly dynamic grassroots movements with a unique history in each European country. It should also be mentioned that when reference is made to studies and surveys carried out in different countries, questions and methodology were not normally identical and sometimes not even similar. This is particularly true for such things as indicators of consumer awareness of fair trade and consumer willingness to pay extra for fair trade products.

3. Fair trade in Europe

3.1 What is fair trade?

Fair trade has the following characteristics:

- remuneration of production that enables producers and their families to earn an adequate living; this implies a fair price, advance payments when needed and a long-term relationship;
- a production environment that does not harm producers' short-term and long-term physical, psychological or social well-being, i.e. that is "fair";
- production that is economically and ecologically sustainable, i.e. that meets the needs of the current generation without compromising the ability of future generations to meet their own needs;
- the use of the most efficient ways to get a product from a producer to the consumer,

by-passing speculators and unnecessary intermediaries;

- preferential treatment for production, trade and marketing that involves indigenous production, small and medium-sized enterprises and the equitable distribution of the generated revenues;
- awareness-raising in the North about the relationship between the consumers' choice and the producers' living and labour conditions;
- campaign and advocacy work that is aimed at changing unfair international trading structures.

3.1 The present fair trade movement in Europe

Fair trade importing organisations buy products from democratically organised producers in the South, paying them a price for their products that enables them and their families to make an adequate living. Fair trade organisations also assist producers in product development, education and training, improving their organisation and marketing and allowing them to share their skills and experience with others.

In Europe, fair trade importing organisations sell their products through so-called World Shops, local groups, exhibitions, campaigns, wholesale and mail-order catalogues. They inform buyers about the producers and their products by means of pamphlets and booklets accompanying the products, slide presentations, exhibitions, magazines, informative meetings and training courses. Along with the promotion of fair trade products, fair trade organisations raise awareness on the unfavourable conditions of production and trade facing producers in the South and campaign for their improvement. Fair trade importers co-operate with other Third World organisations, trying to give people in the South a fair chance and a fair share of the earth's resources.

EFTA, established in 1990, is an association of 12 importers and traders in 9 countries: Austria, Belgium, France, Germany, Italy, Netherlands, Spain, Switzerland, United Kingdom.

World Shops sell products, initiate information activities, exhibitions, educational programmes for schools and conduct joint campaigns. They, along with fair trade importers, invite industry and trade to adopt the fair trade model by, for instance, putting a number of certified fair trade products on the market or by organising political campaigns aimed at the abolition of European protectionism. World shops co-operate on local, regional, national and international levels, supported by their National Associations.

NEWS! is a network of national associations of world shops, representing 3000 shops in 15 member countries: Austria, Belgium, Denmark, Finland, France, Germany, Ireland, Italy, Luxembourg, Netherlands, Norway, Spain, Sweden, Switzerland, United Kingdom.

Fair trade labelling initiatives aim to enlarge the market for fairly traded products by offering these products to the mainstream market (supermarkets, etc.) and at the same time giving consumers an independent guarantee of fair trade standards. The conditions to be met by traders in order to be permitted to label products are laid down

in fair trade product criteria. At the moment, there are labels for the following products: coffee, cocoa, tea, honey, sugar, and bananas.

FLO International is a network of 15 labelling initiatives on fair trade (TransFair, Max Havelaar and Fairtrade Mark) introduced in: Austria, Belgium, Canada, Denmark, France, Germany, Ireland, Italy, Japan, Luxembourg, Netherlands, Sweden, Switzerland, United Kingdom, USA.

In spring 1997, FLO International was set up to co-ordinate the work of international initiatives. The main functions of FLO are to improve the co-ordination of producer related work and communication between the fair trade labelling initiatives and partners in developing countries. FLO has a democratic structure that is made up of both producers (Producer Registers) and fair trade initiatives. This allows it to take effective decisions on potential new products seeking a fair trade label or on developing existing products. The respective FLO Producer Registers include around 300 producer organisations in over 29 countries, with coffee accounting for the majority of these.

IFAT (International Federation for Alternative Trade) was established in May 1989 by alternative trading organisations (ATOs) from Africa, Asia, Australia, Europe, Japan, and North and South America. IFAT is a coalition to promote fair trade and a forum for the exchange of information. It links and strengthens handicraft and agricultural producer organisations from the South and ATOs from both the North and the South. Together, IFAT members work to improve the lives of producers.

3.3 *Market for fair trade at European level*

Surveys reveal that the European public is becoming increasingly discerning in their choice of goods and increasingly willing to pay a higher price for a product reflecting criteria they believe to be important. For example, in the UK 68% of consumers declared they were willing to pay a higher price; and in Sweden 64%. In the UK 86% of consumers are now aware of fair trade, in Sweden the figure is 84% while in the Netherlands and in Belgium 66% and 62% respectively are aware of fair trade labelled products.

In 1997, European fair trade organisations imported from over 800 producer groups. Total retail turnover for all countries covered in this survey is over 200 million ECU. In 1997, European ATOs employed people for an equivalent of 1,500 full-time positions and received support from tens of thousands of volunteers.

On average food products represent more than 60% of retail turnover, of which almost half (globally 30%) is made up of coffee sales.

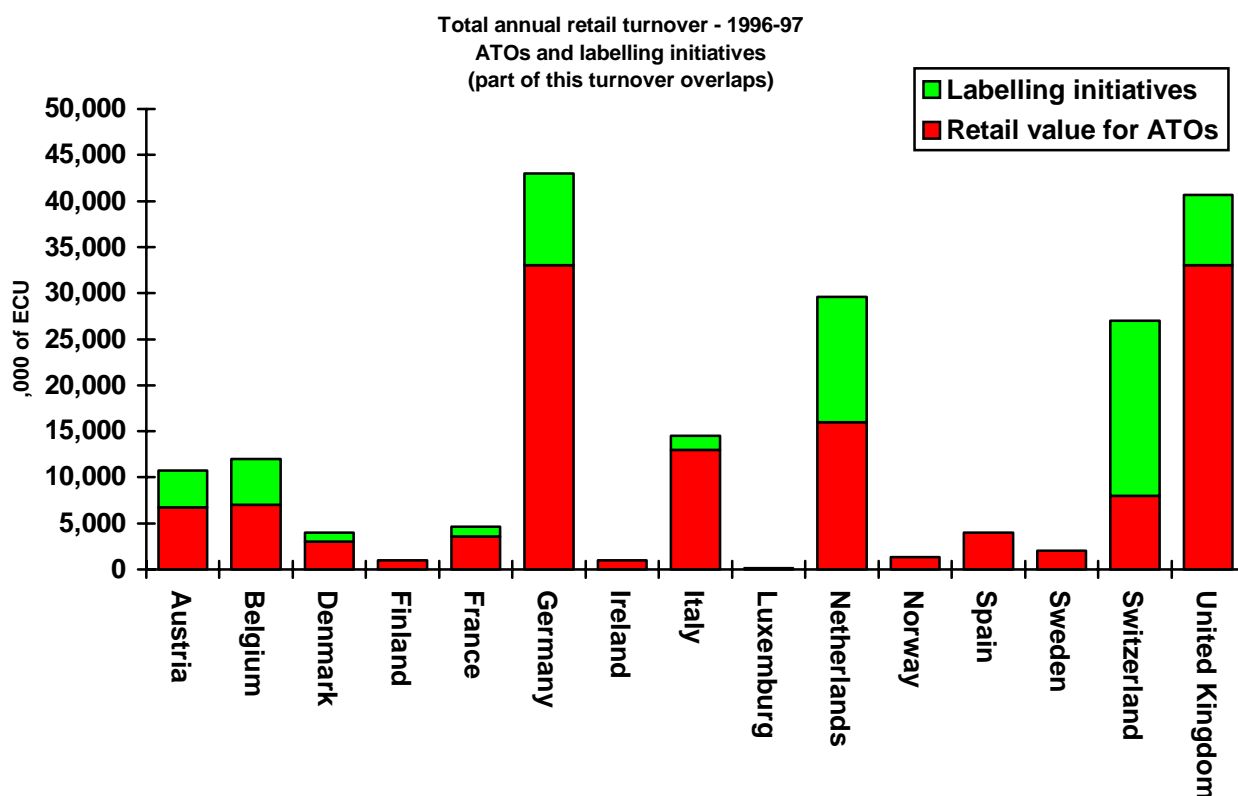
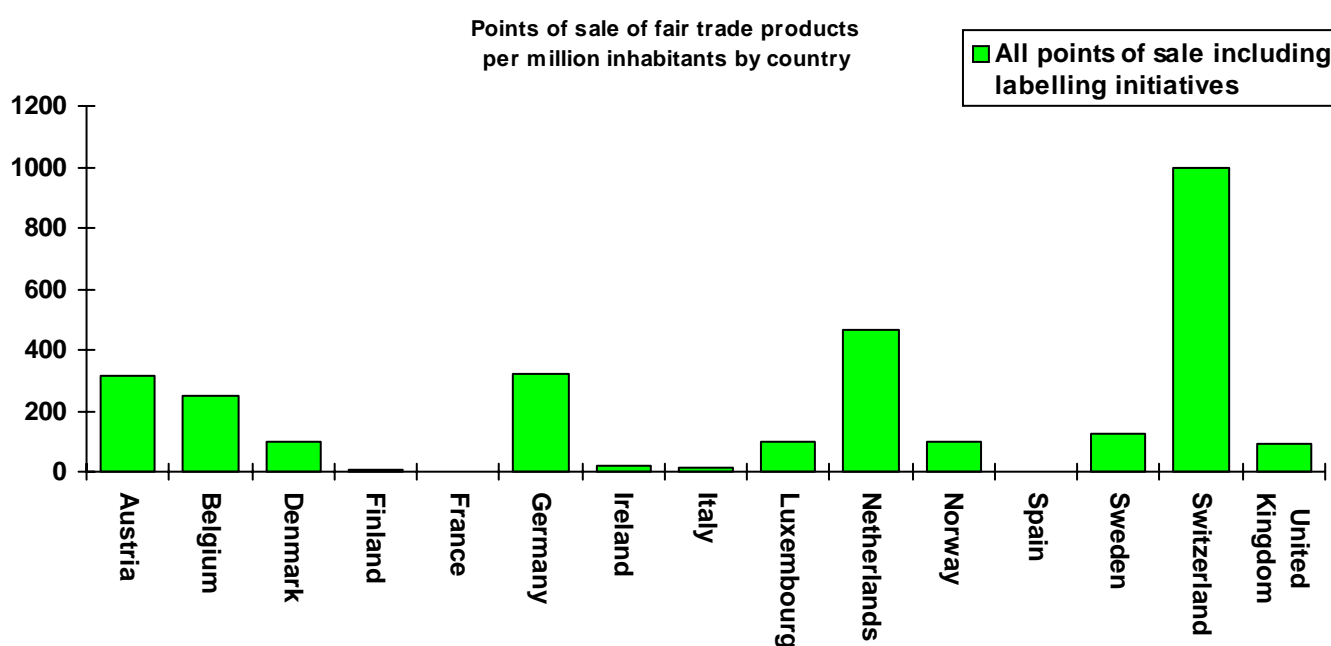


Table with summarised information of the 16 European countries in the study (numbers are rounded off):

Importing organisations:	70+
Selling points:	70,000
Including	
World Shops	3,000
Commercial shops (incl. supermarkets)	33,000
Chains of supermarkets:	50
Employees (equivalent full-time positions):	1,500
Volunteers:	100,000
Labelling initiatives:	Max Havelaar, TransFair, Fairtrade Mark
Budgets for education & public relations:	8 million ECU
Retail turnover:	200 million ECU
Market share of fair trade coffee:	1.7% (European average)



3.4 Perspectives for fair trade in the coming decade

Fair trade is now a well-known concept in most of Western Europe. (Hungary has recently opened the first World Shop in Eastern Europe). Although not included in this survey, it should be stated that many countries outside Europe (the United States, Canada, Japan, Australia, New Zealand, etc.) also have sizeable fair trade sectors.

Fair trade is a concrete form of development co-operation. The experience of countless producer groups shows that fair trade is effective and allows the partners to improve both their economic and social position. In Europe, it attracts increasing numbers of consumers. The extent and impact of fair trade differs from country to country, and seems to depend more on the "age" of the national movement than on the size of the country. In other words: the older the movement, the more impact it has in the country. In most European countries, fair trade is growing by between 10 and 25% per year.

The great innovative strength and the enormous potential of fair trade still have to be developed. One of the most pressing needs expressed by small-scale producers in the South is to expand their presence in the markets in the North, while the evident sympathy of European consumers for fair trade has yet to be reflected in market share. In countries with a long experience of fair trade, sizeable numbers of consumers declare a willingness to pay between 10 and 20% more for fair trade products. To reach these people, fair trade needs to use more sophisticated marketing techniques, increase its access to the media, and improve its management and efficiency. The fair trade movement will also need to continue to conduct campaigns. It will have to ensure that it keeps the fire burning, adheres to its principles, explores the opportunities for new products and markets and continues to be a pioneer. This requires significant

investment both of financial and human (motivated) resources. The challenge to mainstream business should be founded on the same strengths that have determined the success of fair trade thus far.

As far as the South is concerned, producer partners will continue to need guidance and support. The fair trade organisations must continue to convey market trends and consumer needs to small-scale producers who have little access to such information. The fair trade movement must maintain its support for producers as regards product development, quality improvement, efficient organisation of production, and in the transfer of knowledge on administration, cost control, marketing and management.

The fair trade movement will make an increasingly significant contribution to the fight against poverty. It will do so by setting an example and by introducing fair trade principles in regular trade - by means of labels, lobbying and (political) pressure.

4 AUSTRIA

4.1 Structure of fair trade

Three main importers represent the fair trade sector in Austria: **EZA 3. Welt** (*Entwicklungszusammenarbeit mit der Dritten Welt*), **Eine Welt Handel** and **CONA**.

The umbrella organisation for the World Shops, *Arbeitsgemeinschaft Welt Läden - ARGE Weltläden*, was set up in 1982 and now includes 57 retailing associations which market themselves using a common logo. ARGE provides its members with services such as: training in marketing and communication, input for marketing, materials for information campaigns, and information exchange.

TransFair Austria (*Verein zur Forderung des fairen Handels met der 'Dritten Welt'*) is the labelling initiative representing 26 member organisations. The initiative is well established for three products (coffee, tea, cocoa/chocolate) with 21 licensee contracts. Licence-holders import coffee from registered producers in the South and supply 10 chains of supermarkets with their products. In total 2,000-2,500 supermarkets and other retail-outlets sell coffee with the TransFair trade-mark.

EZA is by far the most important importing and wholesaling organisation for fair trade products in Austria and is also a consultant to the Board of TransFair Austria. There is close co-operation between EZA and ARGE whereby the world shop network receives from EZA an additional commission on the turnover achieved by the associated shops.

Table 3: Structure of fair trade in Austria

Importing organisations:	3
Wholesale organisations: (incl. 7 TF licensees)	10
Retailers:	
World Shops	57
supermarkets	10 chains
Selling points:	2,500
Employees (equivalent full-timers):	
EZA	40
TransFair	3
World Shops (co-ordination)	2 paid staff 15 volunteers
Trademarks:	TransFair
Retail channels:	
mail order	yes
individual fair trade stores	yes
chains of fair trade stores	yes
individual commercial stores	yes
commercial chains	yes
Budget for education and PR:	350,000 ECU

EZA is also a member and important financier of AGEZ, the Austrian network of development NGOs.

TransFair has three full time equivalent employees, while EZA employs 38 people of whom most are full-time. Volunteers are the mainstay of the World Shops - with around 900 people (approximately 750 women and 150 men) involved. The World Shops provide employment for 50 women, and 4 men, mostly on a part-time basis. The umbrella organisation employs 2 paid staff and 15 volunteers. In addition, about 3000 volunteers work with unofficial local action groups which sell fair trade products.

During the past few years, the World Shops have become more professional in terms of the location of their premises, the presentation of products and their

opening hours. An increasing amount of money and effort is being put into raising awareness about the origin of products and into improving the marketing system.

4.2 Market for fair trade

The global retail value of the products labelled through TransFair Austria is estimated to be 3.3 million ECU.

The direct turnover of EZA in 1996/97 was about 5.4 million ECU. The retail value of its turnover could be valued at 6.4 million ECU, 55% of which is achieved through the network of the World Shops and 20% through the network of informal groups.

Fair trade awareness is relatively high. 70% of the Austrian population has heard about alternative trade and 56% knows about World Shops; 30% is familiar with EZA, while 20% is aware of the TransFair trademark. The World Shops are also committed to carry out awareness raising campaigns through various initiatives such as direct mailing and advertising in the local press. In the last few years specific campaigns have been carried out on coffee from Uganda, fair trade with Africa, and textiles from India as part of the international campaign "Made in Dignity".

Coffee is by far the most important fair trade product. It represents 90% of TransFair licence income, 41% of EZA retail turnover, and 28% of the World Shops turnover. The market-share of TransFair coffee in retail business is 0.8%.

Coffee or tea sold with a TransFair trademark is between 10 and 30% more expensive than comparable commercial brands. According to EZA fair trade products are marketed at a price premium of between 5 and 20%, although it is difficult to calculate averages on the broad range of products.

The quality of fair trade products is comparable to the standards of commercial importers, especially with regard to coffee and some other food items. The attractiveness of handicrafts varies but is very good for certain items.

Typically, World Shop customers are represented by well-educated women between 25 and 45 years of age, especially in the major cities.

According to a recent TransFair survey, nearly a quarter of the population expresses a willingness to pay more for fair trade products but, as in other countries, it remains to be seen whether this will be reflected in actual buying behaviour.

Recent consumer surveys show that 15-20% of the general public is willing to pay extra for fair trade products with two provisos: that there is a guarantee that the price differential reaches the producers and that fair trade products are widely available in retail outlets, especially in supermarkets. In fact, the main constraints on sales identified by the World Shops are the outlet's location and competition with supermarkets on labelled products. Of lesser importance was the price difference and the quality of certain product ranges.

Fairly traded products, in particular food products like coffee and chocolate, while not representing a significant market share, have given the opportunity to develop public resonance and discussion on international trade issues. For example, recently Südwind-Agentur, the largest Austrian NGO for development education, launched a

campaign on the production and import of orange juice in close co-operation with TransFair and EZA.

Fair trade organisations are not yet recognised for funding by Austrian development co-operation law, although pressure groups are lobbying for revision of such legislation, which might lead to change.

Various fair trade initiatives have been presented to the national Parliament and EZA has, since then, been recognised since as a stakeholder in some committee hearings on international trade. Some public institutions such as offices of Parliament, sections of the Ministry of Foreign Affairs, the Green Party and many educational institutions are using fair trade products, although the overall share of fair trade products in this market does not currently exceed 1%.

The ever-growing interest of the commercial sector and of the media is leading to the emergence of an increasing number of self styled fair trade suppliers. These make it more difficult for conscious consumers to understand and differentiate between suppliers and products. Another interesting trend is a growing expectation among consumers for the availability of organically produced, or at least environment-friendly, fair trade food products.

One result of this is a new co-operation between EZA 3. Welt and the *Ernte für das Leben* (Harvest for life Association), which represents more than 12,000 Austrian farmers dedicated to organic production. It is hoped that this will lead to a new partnership between organic farmers in the South and organic farmers in the North.

Table 4: Market of fair trade in Austria

Retail value:	
EZA	6.7 million ECU
TransFair	3.3 million ECU
Public awareness of fair trade:	
TransFair	20%
EZA	30%
World Shops	56%
Public awareness of fair trade products	70%
Willingness to pay more	25%
Market shares:	
TransFair coffee	0.8%
Organic coffee (EZA)	70% (of organic coffee market)
EZA coffee	0.4%
EZA honey	0.5%
Turnover of fair trade products per product category (EZA 1995/96)	Food: 67% Non-food: 33%

BELGIUM

5.1 Structure of fair trade

In Belgium, the main actors in the field of fair trade are **Magasins du Monde - Oxfam** (Wallonia), **Oxfam Wereldwinkels** (Flanders) along with the sales department of the Dutch **Fair Trade Organisatie**. Magasins du Monde Oxfam and Oxfam Wereldwinkels are both importers and national shop associations. Magasins du Monde Oxfam specialises in handicrafts and Oxfam Wereldwinkels specialises in food products, while Fair Trade Organisatie sells handicrafts to the Flemish World Shops. Besides those organisations there are also **Miel-Maya Honing**, which imports only honey, and **Balam**, which imports textiles from Guatemala.

Fair trade products are sold through 227 World Shops and several hundred supermarkets (belonging to eight major chains) in Belgium.

The network of World Shops employs 30 paid staff in the Flemish region and 10 people in the Walloon region plus 4,000 volunteers.

Max Havelaar België-Belgique, the Belgian labelling initiative, was set up in 1991 and has, so far, limited its activities to coffee and bananas. Some new products, such as chocolate, are expected to be launched in 1998. Max Havelaar-labelled coffee is used by 12 commercial roasters and the 2 EFTA member organisations, Magasins du Monde Oxfam and Oxfam Wereldwinkels.

The products are mainly sold through World Shops and supermarkets, and to a very limited extent through individual commercial stores.

Table 5: Structure of fair trade in Belgium

Importing organisations:	4
Wholesaling organisations: (incl. 12 MH coffee licensees)	17
Retailers: world shops (160 in Flanders and 67 in Wallonia) supermarkets informal local groups (not registered)	227 10 chains many
Selling points:	2000 - 2500
Employees: Importing organisations Max Havelaar World Shops	60+ 3 60+ (and around 7,000 volunteers)
Trademarks:	MAX HAVELAAR
Retail channels: Mail order Individual fair trade shops Chains of fair trade shops Individual commercial shops Commercial chains	yes yes yes yes yes
Budgets for education and PR	400,000 ECU

The World Shops play a very active role in providing information and raising political awareness. Increased awareness and training of World Shop staff in the field of marketing has shown a remarkably positive effect on sales in these shops.

5.2 Market for fair trade

Total retail turnover for the two main importers is estimated to be more than 7 million ECU, with a steady growth over the past few years, especially for Oxfam Wereldwinkels which almost doubled its turnover between 1994 and 1996. No retail figures are available for the labelling initiative, although licence income has been growing since 1994.

The main food products sold are, in order of importance, wine, coffee, honey, nuts, cocoa (for chocolate) and fruit juices. Coffee sold by Oxfam Wereldwinkels is one of the most important products in terms of market share (0.6%), with a wholesale value of 1.6 million ECU.

Public awareness of fair trade is estimated to range between 60 and 70%, while 17% of the population are willing to buy fair trade coffee.

Retail prices of fair trade products are somewhat higher than those of comparable commercial products, but the price differences are said to be smaller than in the other European countries.

Coffee is about 5-10% more expensive when the world price is high but can be up to 40% more expensive when the commercial market is experiencing low prices. Chocolate is, on average, 20% more expensive, while wine is very competitive being only 10% above average commercial prices.

The most successful World Shops seem to be those located in medium-sized towns, where people do their day-to-day shopping in a number of different shops. Every year, around 10 new World Shops are opened.

The typical customers are women, 20-45 years old with secondary or higher education, employed in the social sector, and with an above average income.

Great attention is given to the production and dissemination of information and education. A huge variety of information material is distributed throughout the network of World Shops and campaigns and lobbying activities are frequently undertaken eliciting an active response from the media (eg cocoa, coffee and "Clean Clothes Campaign", "Made in Dignity"). Each year a specific public awareness campaign is carried out in October, together with a campaign day in May and Christmas sales during December.

Table 6: Market for fair trade in Belgium

Retail turnover: Oxfam Wereldwinkels and Magasins du Monde:	7 million ECU
Public awareness of fair trade	62%
Public awareness of fair trade: population willing to buy fair trade products	17%
Market shares: Max Havelaar coffee	1%
Coffee – Oxfam Wereldwinkels	0.6%
Turnover per product category Coffee – Oxfam Wereldwinkels	1.6 million ECU

6. DENMARK

6.1 Structure of fair trade

There are three important importers who are also wholesalers in the Danish fair trade sector: **U-Landsimporten**, **Butik Salam** and **Svalerne**.

The main retailers for the smaller products are mainly the World Shops and speciality shops.

A **Max Havelaar** organisation was established in Denmark in 1994 and the first labelled product, coffee was introduced in April 1995. In spite of the relatively recent launch, the initiative is well known throughout the country and labels now cover coffee, bananas and tea. Other products, like cocoa, honey and sugar are being prepared and will be launched shortly. Max Havelaar products are also being distributed through large supermarket chains.

Fairnet, the Danish association of World Shops, co-ordinates some national information campaigns undertaken by the seven independent fair trade shops.

In addition about 40 commercial stores and 150-300 supermarkets sell some fair trade products. The supermarkets mainly sell food products imported by U-landsimporten. Retail networks also include mail order catalogues.

In the sector there are about 10 salaried employees along with about 100 volunteers working in the importing organisation or in the World Shops.

Information on trade issues is disseminated by newsletters and brochures produced independently by the individual World Shops or co-ordinated by the newly established network. Magazines and local media are also involved especially since the launch of the labelling initiative, and when special events are organised for the presentation of products in local supermarkets.

Funds to carry out education and information campaigns are also provided by development NGOs and public bodies.

Following the establishment of the labelling initiative the national fair trade sector is experiencing steady growth and is also now attracting the interest of the commercial sector, which had initially been quite sceptical towards

Table 7: Structure of fair trade in Denmark

Importing organisations:	3
retailers:	
World Shops	7
commercial shops	40
supermarkets	150
employees:	
importers	20
Max Havelaar	6 (4 paid + 2 vol.)
	2 paid staff +
World Shops (co-ordination)	15 volunteers
trademarks:	Max Havelaar
retail channels:	
mail order	yes
individual fair trade stores	yes
chains of fair trade stores	no
commercial stores	yes
commercial chain of stores	yes
budgets for education and PR:	150,000 ECU

fair trade issues.

6.2 Market for fair trade

The retail turnover achieved through World Shops in Denmark is estimated to be around 3 million ECU, plus another one million ECU worth of labelled coffee and tea.

The public awareness of fair trade is still low (10-15%) - owing partly to the small number of shops. However, products may be better known (25-30%), because people buy not for the sake of fair trade, but because of product originality. Price differences are not so relevant, because many fair trade products cannot be compared to similar products in the commercial market, especially for handicrafts. The shops have rather good locations and the availability of the products is reasonable and improving. Non-food products are still more important than food products. For retailers they make up 80 to 85% of their global turnover. Butik Salam and Svalerne sell mainly clothes, jewellery, gifts, basketry, toys and instruments. U-Landsimporten specialises more in food products like coffee, tea, cocoa, sugar, spices, nuts and honey. Max Havelaar labelled coffee makes up approximately 90% of the licence income and has a market share of about 2%, which is quite impressive considering its relatively recent launch. Tea makes up 10% of the licence income and has a market share slightly below 1%. The average Max Havelaar labelled product costs approximately 10% more than a similar commercial product.

Particular constraints are identified as the relatively high prices of some products and the lack of knowledge and information on fair trade issues.

Since its establishment Max Havelaar has invested in the provision of information to the general public with both direct (ads, Max Havelaar magazine) and indirect information (newspaper articles, supermarket presentations and other special events).

Fair trade organisations are recognised with government funding but only for awareness raising activities.

Max Havelaar tea and coffee is now served in the National Parliament as well as in some governmental organisations.

Table 8: Market for fair trade in Denmark

Retail value:	
Max Havelaar	1 million ECU
World Shops	3 million ECU
Public awareness of fair trade:	10-15%
Public awareness of fair trade products:	25-30%
Willingness to pay more:	not relevant as products are distinct
Market shares:	
Coffee (Max Havelaar)	2%
Turnovers per category:	non-food 80-85% food 20-15%

7. FINLAND

7.1 Structure of fair trade

In Finland there are four importing organisations, (based in the biggest Finnish towns of Oulu, Tampere, Turku and Helsinki) which together with the network of World Shops provide the basis for the wholesaling and retailing network for fair trade products.

More than 40 World Shops are represented in the umbrella organisation (**Maailmankauppojen liitto ry**), which was set up in 1987 and covers the vast majority of fair trade organisations in the country. It produces a quarterly magazine and undertakes a networking role for the exchange of information. Members of the umbrella organisation share a newly introduced common logo, and a project has been started to introduce a labelling initiative.

7.2 Market for fair trade

The fair trade market in Finland has not changed much during the past few years apart from the introduction of a broader and better quality product range in the World Shops. The global retail value of the sector has been estimated to be around 1m ECU.

Academic research on consumer attitudes towards fair trade products has been carried out but findings are not yet available.

Like other NGOs, fair trade organisations are recognised by the international co-operation law and are eligible for funding for information and development project initiatives.

Table 9: Structure of fair trade in Finland

Importing organisations:	4
Wholesaling organisations:	10
Retailers:	
World Shops	41
Supermarkets	some
Employees:	
Importing organisations	n.a.
World Shops	n.a.
Umbrella organisation	7 volunteers
Trademarks:	NONE
Retail channels:	
Mail order	No
Individual fair trade stores	Yes
Individual commercial stores	Yes
Commercial chains	Yes
Budgets for education and PR:	
Umbrella organisation	10.000 ECU

In the near future more emphasis could be given to awareness raising campaigns focusing on the impact of consumption on the environment and on the economies of developing countries.

Government plans are aimed at the re-establishment of import promotion offices for developing countries and their producers.

8. FRANCE

8.1 Structure of fair trade

In France, there are at least three organisations importing and wholesaling fair trade products from the South: **Solidar'Monde**, **Andines**, and **ASPAL**. In addition to these organisations there is a labelling initiative, **Max Havelaar France**, which mainly focuses on coffee.

Of these, Solidar'Monde is the main supplier of World Shops, which are represented in the **Fédération Artisans du Monde**.

Fair trade products are sold through the 67 registered members of the Fédération Artisans du Monde, through organic co-operatives and through mail order catalogues.

Coffee with the Max Havelaar trademark is sold mainly through commercial outlets, although the total number of selling points is unknown.

Solidar'Monde employs 19 people and the Fédération Artisans du Monde has 4 full time paid employees. Most of the World Shops are run by volunteers. Their estimated number varies between 800 and 1500.

Table 10: Structure of fair trade in France

Importing organisations:	3+
Wholesaling organisations:	10
Retailers:	
World Shops	67
Employees:	
Importing organisations	22+
World Shops	mainly volunteers
Trademarks:	MAX HAVELAAR.
Retail channels:	
Mail order	Yes
World shops	Yes
Commercial stores	Yes
Supermarkets	Yes

8.2 Market for fair trade

In 1996 the retail turnover of Solidar'Monde was estimated at around 3.8 million ECU, of which 45% was represented by food products, including coffee, and 54% by handicrafts (textiles, jewellery, and wooden products).

In France, fair trade has grown substantially, especially during the last three years, but a large potential market remains to be tapped. An important impact has already been achieved through awareness raising campaigns but this seems not yet to have been translated into changes in consumer behaviour.

Table 11: Market for fair trade in France

Retail turnover:	3.8 million ECU+
Public awareness of fair trade	n.a.
Public awareness of fair trade products:	13%
Willingness to pay more	37%
Market shares:	
Max Havelaar coffee	n.a.
Turnover per product category	
Food products	45%
Handicrafts	54%

According to a consumer survey, 37% of the French general public is prepared to pay more for products which are being traded fairly. Major constraints are identified the limited number of World Shops and other selling outlets.

9. GERMANY

9.1 Structure of fair trade

The three main importing and wholesaling organisations are **GEPA, El Puente** and **Dritte Welt Partner Ravensburg**. Various other smaller organisations claim to be fair trade importers but are not unanimously recognised as such by the fair trade movement. Other organisations, specialising in specific products, are also Banafair, Pal pool, and Rugmark Deutschlandbüro. Fair Trade e.V. is an NGO based in Wuppertal which finances producer organisation projects in the South and educational projects in the North.

The umbrella organisation for the World Shops, *Arbeitsgemeinschaft Dritte Welt Läden –AG3WL*, was set up in 1975 and now includes 200 World Shops. Members agree to abide by 7 basic criteria: trade must be fair and environmentally sustainable, there must be transparency in pricing, continuity of supply, awareness building implemented through information activities, a not for profit aim, democratic structures and decision-making, and a focus on products from developing countries. The network is working on the establishment of a specific mark that will identify all fair trade shops conforming to the criteria. In addition to those World Shops represented by the network, some 600 other World Shops and numerous action groups sell fair trade products and constitute the main retail outlet for German fair trade importers.

TransFair Germany, the labelling initiative, represents various fair trade actors, social, religious and development NGOs and other civil rights organisations. There are four licensed products (coffee, tea, honey, and cocoa/chocolate) and more than 70 licensee contracts. In coffee trading TransFair Germany enjoys the co-operation of 35 licensees and has recently scored a legal victory by winning a court injunction against the coffee market leader Jacobs, which had engaged in unfair competition advertisements.

The overall retail network is composed of more than 30,000 selling points which distribute TransFair-labelled products (mostly coffee) including big supermarket chains.

Table 12: **Structure of fair trade in Germany**

importing organisations:	5+
Wholesale organisations:	5+
retailers:	
World Shops	700
action groups	6,000
other selling points	25,000
employees	
GEPA	114
trademarks:	TransFair
retail channels:	
mail order	Yes
individual fair trade stores	Yes
chains of fair trade stores	Yes
commercial stores	Yes
commercial chains of stores	Yes
budgets for education & PR:	700,000 ECU

A reliable distribution channel is also represented by a network of 6,000 informal groups, mainly church-related, which sell fair trade products on an informal basis.

Since 1994 the World Shop network has encouraged a process of restructuring and modernisation. It has also fostered the refurbishment and redesign of the outlets in order to make them more attractive for the public.

9.2 Market for fair trade

In the financial year 1996/97 the retail value of products imported by GEPA was 31.8 million ECU, of which 51.7% was represented by coffee products and 29.4% by other foodstuffs. During the past three years the retail turnover of GEPA has remained stable and has confirmed its undisputed position as the leading fair trade importer in Europe.

There is a high awareness of fair trade issues and fair trade products. According to recent market surveys, 40% of the population believe fair trade is a good idea and 11% already buy TransFair-labelled tea or coffee, although the market share for those products is just 2% and 1% respectively. Although some fair trade products, especially food, can be up to 40% more expensive, people are prepared to pay more for it. (Almost 37% of Germans are willing to pay a higher price for coffee if it is guaranteed that the benefits are distributed to producers in developing countries). Fair trade handicrafts are, in general, distributed at very competitive prices. Commercial importers, traders and retailers are beginning to show a greater interest in labelled products.

During the past few years many product-specific campaigns have been carried out in order to disseminate information on fair trade issues and to raise awareness among German consumers. Particularly successful examples have been the campaign on the substitution of cocoa butter in chocolate in 1995, a campaign on child labour in the carpet industry and, more recently, a World Shop initiative during the Christmas period on working conditions in toy production.

Although German consumers are increasingly willing to buy products traded under fair conditions, public institutions have failed so far to give substantial support to the movement. This is only partially compensated for the adoption of fair trade products by some important public and private institutional consumers at state and national level.

Two major trends can be identified in the German fair trade market: a growing openness in the World Shop movement to professionalise their approach and the growing recognition of fair trade as an important issue for the consumer, and hence a more focused attention by commercial competitors on studying this new marketing trend. More and more World Shops, along with commercial traders, recognise that more

Table 13: Market for fair trade in Germany

Retail value: GEPA	31.8 million ECU
Positiveness of fair trade issues	40%
Population buying fair trade products	11%
Willingness to buy fair trade products	17%
Willingness to pay more for fairtrade coffee	37%
Market shares:	
TransFair coffee	1%
GEPA coffee	0.4%
TransFair tea	2%
GEPA tea	1%
Turnovers per category: GEPA coffee	16.4 million ECU

Germans are willing to buy fairly traded products than originally thought. At the same time it is understood that the consumer would like to buy those products in convenient and attractive selling points at a competitive price.

After the fashionable popularity of green consumerism in the 1980s, international trade is now slowly discovering social justice as a marketing argument. More and more companies claim to use fair trade criteria or to

respect the producers and their products. This situation poses threats and opportunities. The danger is that fair trade becomes an empty concept without substantial content or credibility. The challenge is that it will become an appealing public issue and attract the fascination of the media.

10. GREECE

10.1 Structure of fair trade

In Greece, where development co-operation is less well known than in other EU countries, fair trade has a similarly low profile. **Cosmos Art** is the only importing and wholesaling organisation specialising in handicrafts produced in Africa, Latin America and Asia. Four years ago Cosmos Art adopted fair trade principles in their business and was supported in this by the Dutch importing organisation Fair Trade Organisatie. The two organisations co-operate through joint orders from fair trade co-operatives and in providing feedback to the producers on the requirements of the Greek market.

Cosmos Art have produced a good variety of information material about fair trade as well as on local traditions and production techniques. Cosmos Art have about 300 customers all over Greece although there are no fair trade shops.

11 IRELAND

11.1 Structure of fair trade

In Ireland, (North and South) there are two fair trade importers. **Fair Trade Eireann** (formerly Traidereann), which imports mainly from Asian producers, and Oxfam Ireland. Fair trade products are also available from a number of wholefood wholesalers, who act mainly as distributors of goods imported from the major British fair trade organisations.

The retail network is composed of 6 independent fair trade outlets (in five locations: Athlone, Belfast, Galway, Port Laoise and Waterford), four of which are members of an umbrella organisation (**Association of Fair Trade Shops in Ireland**). There is a large network of Oxfam Shops, many of which sell fair trade products, though not exclusively. Apart from these outlets, fair trade goods are available in health food stores throughout the country. One product - cafedirect - is available in a large number of supermarkets. During the last year, Bewley's - the main coffee roaster in Ireland - has launched Bewleys Direct, the first fair trade labelled product produced by an Irish company. This is now 'listed' for all the main supermarkets, and is the top-selling brand in Bewley's own prestige Grafton Street outlet in Dublin. Altogether, fair trade products are available in over 100 outlets in Ireland even if, in some cases, the only product available is coffee.

Traidcraft, the British-based fair trade organisation is very active in Northern Ireland. Its mail order catalogue is widely available and it has an active network of voluntary fair traders. Attempts to extend operations to the South (where postal charges are much greater) have so far been unsuccessful, but this may change.

The Irish Fair Trade Network is the Irish fair trade labelling organisation (jointly with the Fairtrade foundation in Northern Ireland), and is an associate member of FLO (Fair Trade Labelling Organisations International). It was responsible for the introduction of

Table 14: Structure of Fair trade in Ireland

Importing organisations:	2
Retailers:	
World Shops	4
Supermarkets	
Selling points:	100
Employees:	
Importing organisations	2
World Shops	4
Umbrella organisation (IFTN)	7 volunteers
Trademarks:	IFTN Fairtrade Foundation
Retail channels:	
Mail order	yes
World Shops	yes
Commercial stores	yes
Commercial chains of stores	yes
Budgets for education: IFTN	150,000 ECU

Bewley's Direct, and runs a number of educational campaigns.

It also assisted in setting up a small mail order service for fair trade tea and coffee for schools, and is actively promoting fair trade labelled tea and coffee in a wide range of institutions. It is particularly active in campaigning for fair trade bananas, and together with DEFY (Development Education for Youth) has recently been involved in a campaign to get supermarkets to adopt a code of conduct for their Third World imports. One result of this is that Senator Feargal Quinn, who is also managing director of a supermarket chain, is convening a meeting of all supermarkets to discuss how to take this forward.

Oxfam Ireland, which is currently establishing itself in its own right (having hitherto been part of Oxfam UK and Ireland), has chosen fair trade as its main campaign for 1998.

Although exact figures are hard to obtain, the total education and advocacy budget for fair trade in Ireland is estimated to be about 150,000 ECU.

11.2 Market for fair trade

The total fair trade market in Ireland is small. Fair trade coffee sales are still less than one per cent, but growing. Data on consumer attitudes is scarce, but the recent EUROBAROMETER survey conducted by the European Commission on support for fairly traded bananas showed a good awareness and support in Ireland.

The products available range from food to crafts and clothing. Fair trade Eirann concentrates on handicrafts - clay products, baskets, jute bags, wood and stone being the main products. Food products are receiving a very positive response. Distribution continues to be a problem since most products come through Britain and transport costs and currency fluctuations continue to create difficulties.

Overall, the signs are positive. The establishment of a labelling initiative in Ireland; the beginning of work on codes of conduct for the main retailers; and a significant degree of political interest from government and opposition parties in the South and from the British Secretary of State for International Development in the North are all very welcome.

12. ITALY

12.1 Structure of fair trade

The Italian setting for fair trade is characterised by the presence of two main importers: **CTM** (*Cooperazione Terzo Mondo*), which is the largest, and **Commercio Alternativo**, founded in 1992.

Other smaller importers, such as **RAM** - *Robe dell'Altro Mondo*, and **Equomercato** either work independently or in co-operation with one of the two main importers.

There are over 200 World Shops in Italy, a number which has almost doubled in the past four years. The World Shops are represented by a national association (**Associazione Botteghe del Commercio Equo e Solidale Italia**), of which most of Italian World Shops are members.

A labelling initiative, **TransFair Italia**, was established in 1994 by some major NGOs, consumer associations and fair trade organisations (Association of World Shops, CTM, Commercio Alternativo, RAM, Equomercato) and other organisations representing civil society, such as Pax Christi, ARCI, ACLI. Currently 90% of the activities focus on coffee, distributed by 5 licensees, but tea has recently been introduced as a newly labelled product.

There are more than 1,000 points of sale for fair trade products and, although most of the turnover is achieved through the World Shops' network, some commercial shops and some chains of supermarkets are also important retail outlets.

The importing organisations and the World Shops' network altogether employ more than 125 people.

An important role is being played by an savings alternative bank, structured in the form of a financing co-operative, **CTM-MAG**, which grants loans, mainly to fair trade organisations in Italy and abroad.

There is good press coverage on fair trade issues, which have attracted so far the attention of the most progressive media for the innovative nature of the ethical business. The national parliament, following many local councils and regional assemblies, has

Table 15: **Structure of fair trade in Italy**

Importing organisations:	4+
Retailers:	
World Shops	200+
Selling points:	1,000
Employees:	
CTM	25
Retail network	100+ (including World Shops)
Trademarks:	TransFair
Retail channels:	
Mail order	yes
Individual fair trade shops	yes
Chains of fair trade shops	no
Commercial shops	yes
Commercial chains of shops	yes
Budgets for education & PR:	
CTM (excluding personnel)	130,000 ECU

adopted fair trade coffee as its official beverage.

Great emphasis has been placed on the production of information material, which is considered to be part of the trading activity. CTM produces a bi-monthly newsletter along with various materials on producers and products. Visits by producers give the opportunity to people working in the World Shops and to the consumers to establish a more direct link

with the reality of trade with the South.

In 1997, a product-specific campaign was organised for the first time on cocoa, in co-ordination with other European organisations.

12.2 Market for fair trade

The global retail turnover was estimated to be around 13 million ECU in 1996, of which 9 million was represented by CTM (including products labelled with the TransFair mark). Almost 90% of the products imported by CTM are distributed through the network of World Shops, which also sell as wholesalers to other commercial retailers (food stores and health-food shops) as well as to informal groups in their geographical area.

The main product categories are food: coffee, tea, honey, cocoa, chocolate, dried nuts, spices, cane sugar, dried fruits and exotic fruit jams); and handicrafts: decorations, furniture, bags and cases, clothing. Food makes up approximately 60% of the global turnover, of which 25% of the total is coffee, while non-food represents 40%.

Prices of fair trade products do not vary greatly from their traditional competitors (especially for coffee and honey).

Italian consumers still seem to be poorly informed about fair trade issues and about the difference between traditional trade and fair trade. In 1994, around 15% of consumers were aware of fair trade issues. In 1996 the percentage of people willing to buy fair trade products (especially coffee) had increased to 25%. Customers would also be prepared to pay a little more for products which are 'ethically sound'. They appear to buy primarily because of the high quality of fair trade products (26%) and their originality (17%). An obstacle to further development of fair trade in Italy is the insufficient availability of fair trade products to the consumer in the mainstream market.

The network of World Shops is not yet wide enough to reach most consumers and the is still concentrated mainly in the Northern part of the country.

According to a recent market survey, 60% of the customers of the World Shops are women, within the age range of 20-45, and 20% of them have a university degree while 36% have at least secondary education. 73% of World Shop customers prefer supermarkets for the regular purchase of food products. Most clients of World Shops are regular customers.

The market share of fair trade coffee is only 0.1% but is expected to increase considerably following the introduction of the labelling initiative

The spectacular growth in turnover of CTM at the beginning of the decade is now slowing down, although the rate of growth is still more than 10% per annum. The potential of the fair trade market does not seem yet to be fully exploited and further developments are expected following the establishment of the labelling initiative TransFair.

Table 16: Market for fair trade in Italy

Retail turnover:	13 million ECU
CTM	9 million ECU
Public awareness of fair trade:	15%
Public awareness of fair trade products:	-
willingness to pay more:	15%
Market shares:	
Coffee:	0.1%
Turnovers per product category:	
Coffee	25%
Other food	35%
Handicrafts	40%

13. LUXEMBOURG

13.1 Structure of fair trade

The Grand-Duchy may have a small market but consumers are quickly becoming aware of products with a fair trade label. In 1992, when **TransFair-Minka** was founded, fair trade coffee was only sold in the four World Shops (in Bettembourg, Esch/Alzette, Ettelbrück and Luxembourg). In only six years fair trade coffee has reached 3% of the national coffee market. In 1994 TransFair tea was introduced and in May 1996 labelled chocolate made its breakthrough to the Luxembourgian population. TransFair labelled chocolate has proven to be so well accepted by consumers that by 1997 it had already reached a 0.5% share of a very hard market.

Luxembourg has three national coffee licensees, of which two roast their own blend of coffee and very soon those will be joined by a third big Luxembourgian coffee roaster. The most relevant quantities however are distributed by Belgian, German and Dutch coffee licensees. The retail distribution of coffee, tea, chocolate and sweets is covered by two companies, while a few supermarket chains import their own TransFair products. Fair Trade products are also sold in the World Shops, the three main supermarket chains (Monopol, Match and Cactus) and in over 80 health and wholefood shops all over the country, resulting in a global coverage of over 70% of Luxembourgian retail outlets.

For historic reasons and because of the small size of the country, Luxembourg has 2 fair trade labels: **TransFair** and (only for coffee) **Max Havelaar**.

Since January 1996 TransFair-Minka has employed one person, whereas the World Shops are still run entirely by volunteers. Since the World Shops are all members of the labelling initiative, TransFair has become a kind of umbrella organisation for the fair trade sector. In addition to the shops, TransFair has 17 other member organisations from the Third World solidarity, environmental, church and youth sectors.

Table 17: Structure of fair trade in Luxembourg

Importing organisation:	5
Retailers:	
World Shops	4
Natural food shops	21
Chains of supermarkets	3
Selling points:	70% of all food stores
Employees:	1
Trademarks:	Max Havelaar and TransFair
Retail channels:	
Mail order	No
Individual fair trade stores	Yes
Chains of fair trade stores	No
Commercial stores	Yes
Commercial chains of stores	Yes
Budget for education & PR:	20,000 ECU

The budget for education and marketing amounts to 20,000 ECU meaning that most of the publicity work is done through volunteers. Information on fair trade is disseminated through radio, television, articles and publicity in newspapers and magazines, press conferences, information leaflets, presence at 2 national fairs and at many regional markets, posters,

seminars, lessons and development education activities in schools.

A highlight in Luxembourg is the use of TransFair chocolate in eight bakeries, bakery schools and in the St Nicholas bags offered by 20% of Luxembourgian communes. For Easter 1997, the first chocolate Easter figures were offered to the children of Princess Maria Theresa of Luxembourg.

13.2 *Market for fair trade*

No studies are available on public awareness of the fair trade sector. Interest has been shown by commercial retailers, as is reflected by the large number of supermarkets engaged in the sale of fairly traded coffee.

The products sold in the World shops include a range of food and non-food products. The customers appear to be relatively wealthy, which may have a certain effect on their willingness to pay more than for other products.

14 NETHERLANDS

14.1 Structure of fair trade

Of the many importing/wholesaling organisations within the Dutch alternative market, **Fair Trade Organisatie** – formerly SOS Wereldhandel - is the most significant, followed by De Evenaar. Amongst the others, mainly importing handicrafts and meeting the criteria of Nivah (Ned. Imp. Verg. van Altern. Handel. - Dutch Association of fair trade importers) are: Adesa, Amandla, Cusco, Esperanza, Flash, Goed Werk, Hasla, Kanika, Lanka lamai, Mandat Nepal Handel, Only Natural, Sarana, Tahoua Niger, Tito de Allencar, Wisnu.

The retail channels are represented by a solid network of World Shops, mail order catalogues, some commercial shops and 50 supermarket chains selling a complete variety of fair trade food products. The alternative retail market consists mainly of 1,250 fair trade selling points, including 395 World Shops which are members of the **National Association of World Shops** - *Landelijke Vereniging van Wereldwinkels* - and the 6 shops managed directly by Fair Trade Organisatie. The umbrella organisation of the World Shops provides co-ordination for the promotion of education campaigns and training in marketing and financial management for the member organisations, which are recognisable by a common logo.

Max Havelaar was the first labelling initiative in Europe, established in 1988, and is now a trademark organisation labelling four products (coffee, cocoa, honey and bananas) marketed through more than 23 licensees for coffee and 9 licensees for cocoa. Max Havelaar products are now marketed through 90% of Dutch selling points.

Considering the importing organisations, the Third World Shops network and the labelling initiatives, the fair trade sector employs more than 200 people altogether.

Table 18: Structure of fair trade in the Netherlands

importing organisations:	20+
wholesale organisations:	30+
Retailers:	
World Shops	395
Fair trade shops	6
Supermarkets with fair trade	50
Selling points:	
Fair trade	1,250
Fair trade in supermarkets	50
Max Havelaar in supermarkets	7,000
Employees:	
Fair Trade Organisatie (paid staff)	100+
(volunteers)	125+
World Shops Co-ordination	12
Max Havelaar (paid staff)	8
Trademarks:	Max Havelaar
Retail channels:	
Mail order	yes
Individual fair trade shops	yes
Chains of fair trade shops	yes
Commercial stores	yes
Chains of supermarkets	yes
Budgets for education & pPR	1.4 million ECU

The budgets allocated by FTO for public awareness and marketing is around 1 million ECU.

14.2 Market for fair trade

For Fair Trade Organisatie, retail turnover in 1996 amounted to 16 million ECU, of which 41% is made up of coffee products, 22% of other foodstuff and 34% of handicrafts. The main food products are coffee, tea, wine, cocoa and nuts, while the main categories of handicrafts are decorations, jewellery, clothing and fashion, toys and musical instruments. FTO's turnover is mainly achieved through the World Shops network (45%), FTO's Fair Trade Shops (11%) and through the institutional market.

According to market surveys, 80% of the Dutch public is familiar with the name World Shop and 70% of the public knows the Max Havelaar trademark, while 15% of the public said to they would be willing to buy fair trade products and to pay more compared to regularly traded products. The average profile for customers of World Shops is defined as women with a higher level of education and above average income.

In recent years many awareness-raising and/or product-specific campaigns have been promoted and co-ordinated at national level on trading issues such as the campaign on child labour, the Clean Clothes campaign, the successful lobbying at European level on cocoa butter. A growing and positive trend among commercial importers and retailers is the increasing attention and concern for their ethical image. The concept of ethical business promoted by fair trade actors during the past few decades is becoming an important issue to improve the consumer friendliness of all sorts of products.

Over the past few years 200 World Shops have been adopting the "corporate" style of the Landelijke Vereniging van Wereldwinkels, and World Shops tend to have fairly good locations, regular opening hours and a modern image. Nevertheless, constraints are still identified in low profit margins which prevent World Shops from finding better locations where high rents are payable.

Table 19: Market for fair trade in the Netherlands

Retail turnover: Max Havelaar FTO	33 million ECU 16 million ECU
Public awareness of fair trade: Max Havelaar World Shops	70% 80%
Public awareness of fair trade: willingness to pay more:	15% 12-15%
Market shares: FTO coffee Max Havelaar coffee Max Havelaar cocoa Max Havelaar bananas	0.7% 2.6% 1% 8%
Turnovers per category (FTO): Coffee Other food Handicrafts	41% 22% 34%

The institutional market represents quite an important outlet for fair trade products and to date many local councils and national governmental organisations, along with the national Parliament, are using fair trade products, mainly coffee. The Ministry of International Development is now considering new legislation which will promote and support social and environmentally friendly products imported from the South. The Dutch government has decided to support labelling initiatives and will lobby the EU to lower tariffs for ethically labelled products.

15. NORWAY

15.1 Structure of fair trade

The major fair trade organisation importing fair trade products is **Alternativ Handel Bergen** which took over the leading role for importing such products after its sister organisation in Oslo, the Foundation for Alternative Trade ceased trading in 1997. Alternativ Handel Bergen has its own shop in Bergen, and sells to a variety of smaller solidarity groups around the country. In addition, a variety of solidarity groups, private organisations, and World shops import products of their own. Filling the void created on the retail side in Oslo, Norwegian People's Aid have a shop in the centre of town. Norwegian People's Aid is currently the only NGO producing a mail order catalogue.

The Max Havelaar fair trade mark was introduced in Norway in September 1997. It has been well received in the market, and is receiving funding from the Norwegian government. So far, the Max Havelaar mark is only used for coffee, but there are plans to extend it to tea, sugar, bananas, and other foodstuffs in due course.

Table 21: Structure of fair trade in Norway

importing organisations:	2
retailers:	2
world shops	3
action groups	several
commercial stores	several
selling points:	50
Trademarks:	-
Retail channels:	
mail order	yes
individual fair trade stores	yes
chains of fair trade stores	no
commercial stores	yes
commercial chains of stores	no
budgets for education & PR:	none

15.2 The Market for fair trade

Stiftelsen Alternativ Handel commissioned Gallup to carry out a public opinion poll in June 1997. The poll was carried out in the south-east of Norway (the most densely populated area of the country) using computer assisted telephone interviewing.

The poll showed that there was a fair degree of awareness of fair trade. (26% said that they had heard of alternative trading, although there may have been some confusion over the term 'alternative trading'.) When asked whether they would have a positive attitude towards purchasing goods bearing a fair trade mark, 64% said they would be very positive.

Table 20: Market for fair trade in Norway

Retail turnover: Alternativ Handel	
public awareness fair trade:	26%
willing to buy fair trade products familiar with fair trade	64%
willingness to pay more:	yes

16. SPAIN

16.1 Structure of fair trade

There are three main importers active in Spain: **Intermón, Alternativa 3, Ideas**. Other smaller importers are Mercadeco and Equimercado. Intermón and Alternativa 3 are also retailers together with s'Altra Senalla and Setem. At national level there is a co-ordinating group of fair trade organisations. A common labelling initiative has yet to be established.

In the past few years some importing organisations have merged creating economies of scale and some new importers are being set up because of the great potential of the market. In general terms, the national fair trade market has grown considerably both in terms of turnover and points of sale and especially in its product range. Food products have only been introduced relatively recently and are rapidly becoming more important as a percentage of the retail value.

There are currently more than 60 points of sale expressly dedicated to fair trade products. The three main importers employ more than 30 people and benefit from the contribution of about 30 volunteers.

The retail channels are mainly represented by the network of the World Shops but products are also distributed through mail order catalogues and commercial stores. The World Shops have been created or supported by different (importing) organisations and have developed various criteria for membership.

16.2 Market for fair trade

National retail turnover is estimated to be over 4 million ECU, where Intermón represents almost 30% of the national turnover followed by Ideas and Alternativa 3. An impressive growth trend is being experienced by Alternativa 3 (of more than 60% over the past year). Alternativa 3 provides products to a network of 32 World Shops, 12 of which are strictly linked to the co-operative.

The major constraints to a more rapid growth have been identified as the limited variety in the product range and pricing which is not competitive with the commercial sector.

The points of sale are found to be attractive and inviting as time and effort has been invested in attractive outlets.

Fair trade products are predominately handicrafts, (wall hangings, home textiles, re-cycled

Table 23: Structure of fair trade in Spain

Importing organisations:	5+
Wholesaling organisations:	4
Selling points:	60+
Employees:	
Importing organisations	30+
Trademarks:	n.a.
Retail channels:	
Mail order	yes
World Shops	yes
Commercial stores	yes
Commercial chains of stores	yes

paper, jewellery, wooden products, musical instruments and toys) rather than food products, which currently represent only 25% of retail turnover. Recent trends show that the introduction of coffee products has had the effect of stimulating and expanding the sales of other food products. Unlike other European countries, coffee is not yet the flagship product although in recent years it has become more important.

Currently, Spanish fair trade customers are mostly women, aged between 17 and 30, open-minded, and either students or employees.

In the last four years, retail turnover has grown spectacularly, with annual increments of more than 15%. In the near future new points of sale are expected to be opened mainly through World Shops. Attention from the commercial sector is also predicted because public awareness is increasing and the media is becoming more interested in fair trade issues.

Table -24: Market for fair trade in Spain

Retail turnover:	4 million ECU
Intermon	1 million ECU
Alternativa 3	1.5 million ECU
Public awareness of fair trade:	n.a.
Willingness to pay more:	12%
Market shares:	
Coffee (labelling initiative)	0.7%
Turnover per category: (Intermon)	food: 20% handicrafts: 80%

17. SWEDEN

17.1 Structure of fair trade

In Sweden several organisations import fair trade products, the most important being **Sackeus**, (which represents almost 50% of the fair trade market), **Afrika Import**, **Alternativ Handel** and **North & South Exchange**.

In August 1996, the national labelling initiative, **Rättvisemärkt**, was set up by representatives of church organisations, the two largest unions, foreign aid institutions and consumer associations. The establishment of the Swedish labelling initiative can rely on a broad base in Swedish society. After the initial period needed to recruit personnel and establish an office, the association started external activities in March 1997. The first products to be launched with a fair trade mark were coffee and tea. Labelled products are sold through the fair trade retail network but also through chains of supermarket and commercial stores.

Since 1986 an association of most of the Swedish fair trade groups, (**Världsbutikerna för rättvis handel**), has co-ordinated the activities of 46 members, of which 15 are World Shops. Recently the structure has been strengthened and will be able to provide training for volunteers, information and educational material and support for the organisation of seminars and campaigns. From this year members can apply for the use of a common registered logo which guarantees the respect of fair trade criteria in retailing.

17.2 Market for fair trade

The retail value of the Swedish fair trade market is estimated to be more than 2 million ECU. The retail turnover of the main importer, Sackeus, consists mainly of food products (coffee, marmalades, chocolate) followed by handicrafts (jewellery, T-shirts, baskets).

The initial phase of the labelling initiative has seen the launch of coffee and tea, while chocolate will soon be added to the product range.

Table 25: Structure of fair trade in Sweden

Importing organisations:	4+
Wholesaling organisations:	4
Retailers:	
World Shops	15
supermarkets	n.a.
selling points:	1,000+
employees:	
importing organisations	20+
labelling initiative	3.5
umbrella organisation	1.5
trademarks:	Rättvisemärkt
retail channels:	
mail order	yes
World Shops	yes
commercial stores	yes
commercial chains of stores	yes
budget for education:	200,000 ECU+

The product range in the World Shops is growing faster than the product range of the importers. Frequently World Shops have to buy products from fair trade organisations in other countries to provide customers with the variety of products they expect, but even this does not seem to meet consumers' expectations. The development of the World Shops seems to be restrained by the limitation of the product range. At the same time the products imported are limited because of

the insufficient number of World Shops.

Because of the size of the country and the distance between fair trade actors, co-operation between the various importers, World Shops and selling points is difficult and expensive. Nevertheless, efforts will be made in the future to develop closer co-ordination and a long-term strategy between fair trade actors in Sweden.

The number of points of sale, is increasing especially as a result of the interest raised by the labelling initiative. Correspondingly the market share for fair trade in Sweden is expected to increase considerably over the next few years.

In a consumer survey carried out last year, 84% of the interviewees expressed their favourable interest in the fair trade labelling initiative and 64% said they were willing to pay more for fairly traded products. For the labelled products currently on the market the price difference with the commercial sector is only marginal.

Over the past few years dynamic efforts have been made by various organisations to raise awareness of fair trade issues. In 1995 an environmental NGO carried out a campaign on fair trade coffee, World Shops days were organised in 1996 and 1997 together with a specific campaign on coffee to launch of the labelling initiative. Fair trade fairs and presentations were also held. A private foundation, the Fair Trade Centre, conducts surveys on fair trade and carries out public awareness campaigns on current issues such as the textile industry (Clean Clothes Campaign), sports shoes and toys.

With the launch of the labelling initiative the institutional market is increasing in importance. For example, the Church of Sweden recommends that labelled coffee and tea should be served after Sunday services.

Recently the Swedish Foreign Ministry expressed positive support for the Swedish labelling initiative especially for its co-ordination with established initiatives in other European countries.

Table 26: Market for fair trade in Sweden

Retail turnover:	2 million ECU+
Public awareness of fair trade:	15-20%
Positiveness on labelling initiative	84%
Willingness to pay more:	64%
Market shares:	
Coffee (labelling initiative)	0.7%
Turnovers per category: (Sackeus)	food: 25% jewellery: 20% toys: 16% ceramics: 15% accessories: 15%

18. SWITZERLAND

18.1 Structure of fair trade

Two main fair trade importing organisations are currently active in Switzerland: **OS3/Claro** and **Caritas Fairness Handel**. Since the establishment of the labelling initiative **Max Havelaar** in 1992, several commercial importers are also importing products under fair trade conditions from licensed exporters in the South, including Blaxer, Narimpex, Migros, Coop and Volg.

Claro, formerly OS3, is the most important fair trade importer of food and handicraft products. Twenty NGOs are represented on its board, among which are the three associations of World Shops (**V3WL - Vereinigung Dritte Welt Läden**, **Magasins du Monde** and **Prodotti Terzo Mondo**). Caritas Fairness Handel is the fair trading branch of Caritas Switzerland. It concentrates mainly on handicraft products (garments and clothing accessories, decorative items and jewellery) and runs eleven Caritas Shops all over Switzerland.

The Swiss World Shops are represented by three associations which reflect the three major national linguistic groups, respectively in the Italian-, French- and German-speaking parts of the country.

Max Havelaar Switzerland is the best established labelling initiative with six labelled products (coffee, honey, chocolate, tea, bananas, and sugar) and significant market shares (6% for honey, 5% for coffee). More than 50 brands of coffee, (which represent almost 70% of the license income) and ten brands of honey are available.

In March 1997 fair trade bananas were launched, supported by an appropriate information campaign and have immediately attracted the attention of Swiss consumers, reaching a very encouraging market share of around 13% in only few months.

The total number of points of sale for fair trade products is estimated to be about 7,000 which is between 80 and 90% of the average national retail distribution.

The retail network consists of World Shops and charity shops of various NGOs (Caritas, Kalebasse, Helvetas, UNICEF), independent commercial outlets such as organic food shops as well as chains of specialised commercial stores (health food shops, drugstores) and chains of supermarkets (e.g. Migros, Coop, Volg). The World Shops have gone through a process of internal restructuring, motivated by the

Table 28: Structure for fair trade in Switzerland

Importing organisations:	Less than 13
Wholesaling organisations:	11
Retailers:	
Informal groups	140
World Shops	60
Commercial outlets	7,000
Selling points:	7,000+
Employees (excl. World Shops):	
Claro	15
Max Havelaar	11
Trademarks:	Max Havelaar
Retail channels:	
Mail order	yes
Individual stores	yes
Chains of fair trade stores	yes
Commercial stores	yes
Chains of commercial stores	yes
Budgets for education & PR:	
Claro	120,000 ECU
Max Havelaar	300,000 ECU

increased competition brought in by the success of the Max Havelaar initiative.

Excluding the World Shops, Swiss fair trade importing or labelling organisations employ more than 30 people.

Information on fair trade issues and products is disseminated through a variety of channels, including TV spots, newsletters, bulletins, PR and information campaigns, most of which are product specific (e.g. carpet and textile label campaigns).

18.2 Market for fair trade

The retail turnover of Claro was 5.9 million ECU in 1996 (a decrease from 7.1 million ECU in 1994). The product range focuses primarily on food products, where coffee represents 28% of the total retail value. Caritas Fairness Handel achieved a retail turnover of 2.5 million ECU, mostly through the network of World Shops and Caritas Shops but also via a mail order catalogue.

Max Havelaar labelled products have generated an estimated retail turnover of more than 19 million ECU, largely concentrated on coffee brands. Considerable success has also been achieved for imported honey and the recently launched bananas. Market surveys show that consumer awareness of the labelling initiative is one of the highest in Europe, at more than 57% of the population.

The main constraints to a larger scale success seem to rest on the relative lack of choice in the product range and on the limited promotional activity carried out by the licence holders.

However, since the founding of the labelling initiative the fair trade sector in Switzerland has become firmly established in mainstream commerce and fair trade issues enjoy growing coverage in the media.

Table 29: Market of fair trade in Switzerland

Retail turnover:	
OS3/Claro	5.9 million ECU
Caritas Fairness Handel	2.5 million ECU
Max Havelaar	19 million ECU
Public awareness of labelling initiative	57%
Public awareness fair trade products:	
Familiarity with fair trade coffee	36%
Willingness to pay more:	n.a.
Market shares:	
Coffee (retail market)	5%
Honey (import market)	6%
Bananas (estimated since March 1997)	13%
Turnover per category (OS3):	
Coffee	28%
Other food	48%
Handicrafts	24%

The labelling initiative has been welcomed by the Federal Office for Foreign Affairs and is considered to be coherent with government policies. This has also been beneficial in introducing fair trade products into the catering market where many public institutions are promoting labelled products in their cafeterias.

19. UNITED KINGDOM

19.1 Structure of fair trade

In the United Kingdom there are various fair trade organisations among the most important of which are: **Traidcraft, Oxfam Trading, Twin Trading, Equal Exchange** and **Shared Earth**. The Body Shop Foundation has a fair trade department and therefore can only partially be considered an ATO.

In January 1995 an umbrella organisation of World Shops, the **British Association for Fair Trade Shops – BAFTS**, was established to co-ordinate the promotion of fair trade through a network of 65 members. BAFTS members share common aims and standards which help differentiate genuine fair trade shops from others.

Apart from those independent World Shops Oxfam and Shared Earth run their own chains of shops, most of them relying on volunteers. In addition to those "specialised" outlets, the retail network consists of some 3,000 other independent shops which sell fair trade products within their usual range of goods. Overall, the British retail network consists of World Shops, chains of fair trade shops (mainly the 200 Oxfam Shops selling fair trade products) and some mail order catalogues.

There is a good degree of co-operation between the various fair trade organisations. A good example is the Cafédirect consortium - a joint collaboration between Oxfam, Traidcraft, Twin Trading and Equal Exchange - which was set up to market a fair trade brand of coffee in the supermarkets. Regular co-operation, extended to development NGOs, is also common for the implementation of information campaigns on ethical issues such as clothing codes and international trade in tropical products.

The importing organisations employ more than 150 people. This excludes World Shops which benefit from the work of around 1,000 voluntary staff, most of whom are women.

The fair trade label, the **Fairtrade Mark**, operated by the Fairtrade Foundation, is

Table 29: **Structure of fair trade in UK**

Importing organisations:	7+
Retailers:	4+
Selling points:	3,000
of which	
World Shops	80+
Outlets as chains of fair trade shops	200+
Employees:	
Importing organisations	150 (excl. World Shops)
plus more than 1,000 volunteers who run Fair Trade shops	
Trademark:	Fairtrade Mark
Retail channels:	
mail order	Yes
individual fair trade shops	Yes
chains of fair trade shops	Yes
commercial shops	Yes
chains of commercial stores	Yes
Budgets for education & pr:	
Fairtrade Foundation	50% of the total budget

currently labelling coffee (roast and ground and freeze-dried instant), teas and chocolate and in the near future will also launch fair trade bananas. Fairtrade marked products are available from the major supermarket chains - Sainsbury's, Safeway, Tesco, ASDA, Waitrose, Somerfield, Morrison, CWS and CRS (Co-ops) - and from a range of healthfood shops, smaller stores and independent retailers totalling over 3,000 selling points.

The Fairtrade Foundation devotes a high percentage of its total budget to education and promotion, with information disseminated through the media and campaigning activities carried out in co-ordination with its member

agencies.

19.2 Market for fair trade

The retail turnovers of the two major organisations are, respectively, 16m ECU for the Oxfam Fair Trade Company and 12.6m ECU for Traidcraft. Overall, the retail value of products imported by fair trade importers in the UK is estimated to be well over 30m ECU per annum, which thus makes it one of the most important fair trade markets in Europe.

Handicrafts have, in general, been the most important category of product but in recent years food products have become increasingly significant. In 1996 food and beverage sales for Traidcraft rose by 6.5 per cent to reach an overall value of almost 5 million ECU. Traidcraft used to sell just teas, coffee and some dried fruit and nuts but their extended range of high-quality breakfast mueslis, chocolate bars and snack products are proving increasingly popular with consumers. Adjusted for inflation Traidcraft's overseas purchases of fair trade goods have grown by 30 % since 1990.

Marketing surveys conducted over the last few years indicate that there is growing awareness of, and demand for, fairly traded products. The strongest opinion identified in the survey was 'that trading fairly with a Third World country is a better way to help that country develop than giving aid'. 86% of the sample agreed with this statement. Agreement that 'workers in the Third World are exploited and don't get enough for their produce' was almost 85%. Other research findings show that 85% of the sample agreed that 'they would like to see fairly traded products in their supermarket'. The majority (68%) of the sample agreed that 'they would pay more for fair trade products, if they could be sure that farmers and workers in the Third World received a fair return'. Agreement was strongest amongst women at 73%. Another survey carried out in 1994 indicated that four out of ten people questioned were aware that fair trade products were on sale in supermarkets. Of these, one in four had bought a fair trade product within the last month. This means that 10% of the entire sample bought a fair trade product within this period.

Table 30: Market of fair trade in UK

Retail turnover:	
Traidcraft	12.6 million ECU
Oxfam	16.0 million ECU
Fairtrade labelled products	8.0 million ECU
Support for fair trade:	85%
Willingness to pay higher prices for fair trade products	68%
Market share:	
Cafedirect	2.8%
turnover per category:	
coffee	5%
other food	22%
handicrafts	36%
other products	37%

The best-selling product labelled with the Fairtrade Mark, Cafédirect coffee, has been a remarkable success as the first fairly traded product to achieve mainstream distribution. Available in all the major supermarket chains, it has gained a 2.8% market share. In recent government policy papers, ethical trade has been mentioned as an effective way to sustain development and labelled coffee and tea have been adopted as official beverages by the House of

Commons.

Generally speaking, fair trade importers have made important improvements in terms of design, quality and presentation of products, although the public image of such fair trade products is still low. The product range is improving, although low and unpredictable supply and poor design, still represent major constraints. Inconvenience of shop location and space limitation, which affects display and presentation have been identified as weak points to be tackled, especially now that competition from commercial retailers is increasing.

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