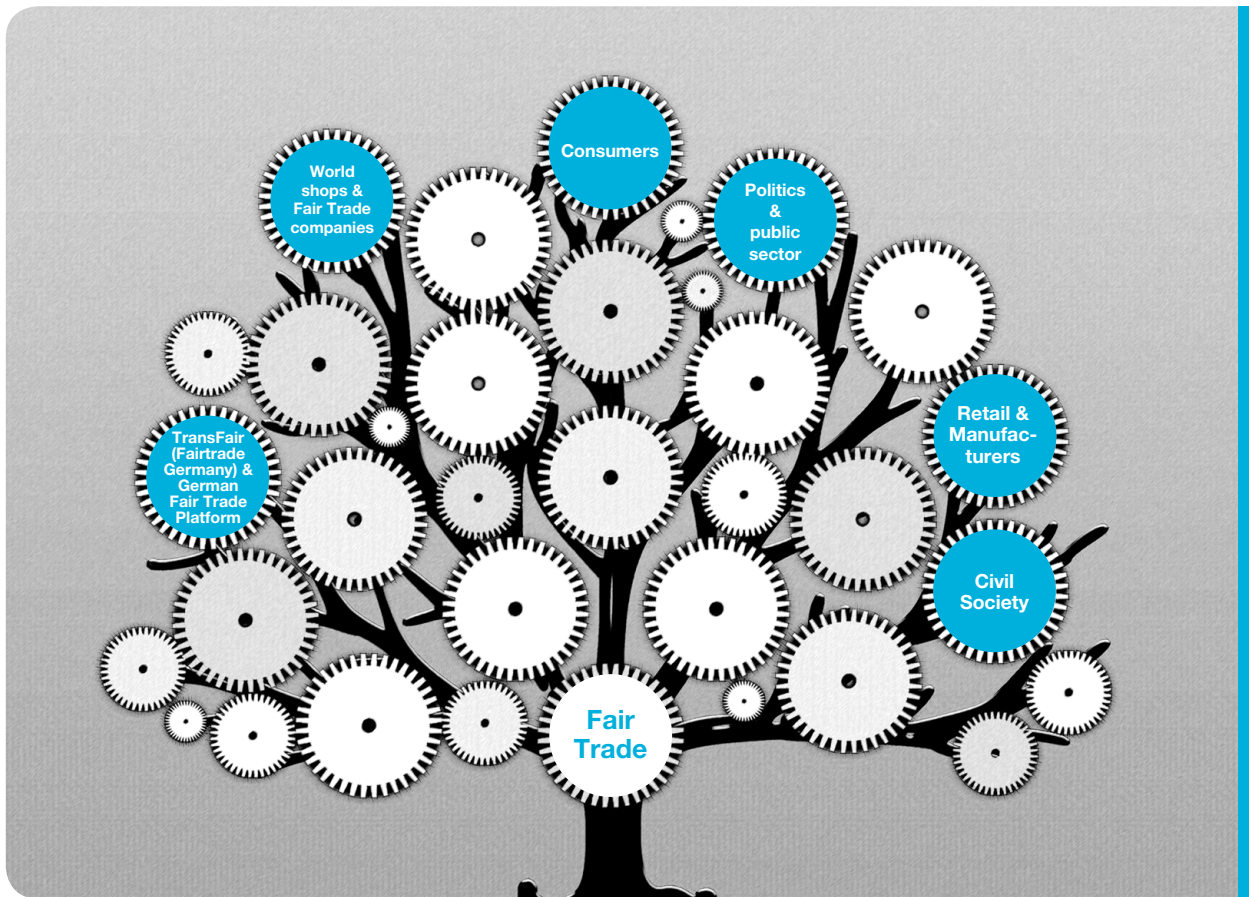


EXECUTIVE SUMMARY: FINAL REPORT

# “Does Fair Trade Change Society?”

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Summary of the trend and impact study

English version published by  
TransFair e.V. (Fairtrade Deutschland)



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This abridged report sums up the key findings from the study.

The full version of the study including the annex was published by CEval GmbH.

It is available in a digital German version on the publisher’s website and via the following download links:

<http://www.ceval.de/modx/webindex.php?id=6>

<https://zenodo.org/record/163639#.WBnYX6t0rVI>

[https://www.fairtrade-deutschland.de/fileadmin/DE/mediathek/pdf/fairtrade\\_wirkungsstudie\\_gesellschaft.pdf](https://www.fairtrade-deutschland.de/fileadmin/DE/mediathek/pdf/fairtrade_wirkungsstudie_gesellschaft.pdf)

Only the full version should be referred to for scientific citation.

# Executive Summary

The study summarized in this abridged version was conducted by CEval GmbH between September 2015 and September 2016, on behalf of TransFair e.V. (Fairtrade Deutschland), the Service Agency Communities in One World/Engagement Global gGmbH<sup>1</sup>, Brot für die Welt - Evangelischer Entwicklungsdienst Evangelisches Werk für Diakonie und Entwicklung e.V.<sup>2</sup>, and Bischöfliches Hilfswerk MISEREOR e.V.<sup>3</sup>, Forum Fairer Handel e.V.<sup>4</sup>, with financial support from the Friedrich Ebert-Stiftung e.V.<sup>5</sup>. It examines the impact of fair trade in Germany.

As a trend and impact study, it starts with an analysis of changes found since the year 2000, both within the Fair Trade movement (especially within the Fair Trade associations and umbrella organisations, the world shops and Fair Trade companies) and for four target audiences of fair trade (civil society, politics and the public sector, retailers and manufacturers, and consumers). This is followed by a targeted investigation to determine if the Fair Trade movement has contributed significantly to these developments.

The investigation focussed on the following key questions:

- How has civil society’s involvement in fair trade changed?
- How far have German politicians created a regulatory framework for fair international trade and sustainable development? How far has fair public procurement been established within public administration?
- What are the developments of fair trade in German food retailing? In what way have business practices of retailers and manufacturers changed in regards to fair trading criteria?
- In what ways have consumer awareness and purchasing behaviour changed in regards to fair trade? What level of potential for support can be found among consumers for the concerns of fair trade?
- In what way has the work of Fair Trade umbrella organisations, associations, of world shops, and Fair Trade companies changed since the year 2000?
- In what way have the efforts of the Fair Trade movement contributed to changes within the relevant social target groups for fair trade?

Designed as a case study, it examined the Fair Trade movement’s impact on social change in Germany through a contribution analysis approach. Being the first study on fair trade on trends and impact in a “consumer country” over a period of 15 years, it serves as a pilot study, offering reference points for further case studies in Germany and other countries of the Global North.

A comprehensive collection and analysis of data, mixing qualitative and quantitative methods, preceded the research conclusions. Since this was a commissioned study and followed a participative approach, the sponsors were repeatedly involved in the study’s examination process. Their involvement mainly occurred within the coordination phase (for the identification of key questions, for example), within data collection (such as the identification of relevant sources of data and interviewees) and within classification of (provisional) research findings

The study concludes that several changes towards fair trade objectives could be observed for the assessment period of 2000 to 2015. For civil society, politics and public sector, for retailers and manufacturers as well as for consumers, a trending change in awareness was notable – albeit to a differing extent for each group.

Among the most visible changes regarding fair trade is the availability of a continually widening range of fairly traded products, not only at increasingly professional Fair Trade specialist retailers, but also at conventional retailers. Sales have also increased rapidly, especially since the middle of the 2000s, due to factors including the increased availability of products and greater awareness among new consumer groups. But fair shopping is not only a matter for private individuals. The keyword here is “fair public procurement” – public authorities making fair purchases – which is gaining relevance and is supported by civil society organisations, who switch to fair trade products where possible for their own use and events. Also today’s business world is faced with the issues of fair and sustainable management to a much higher degree than 15 years ago, increasing the focus on production and labour conditions along their own supply chains. The study’s results suggest that the Fair Trade movement’s information and educational activities – as well as its public outreach, its networking with various societal actors, its political lobbying and campaigning together with other social forces – has contributed to this development.

Despite the increased significance of social sustainability for business, politics, and society, there is still considerable potential for change. The principles of fair trade haven’t been comprehensively implemented in German food retailing, for example – unfair trade practices still occur. Also, despite positive trends, consumers and public procurement bodies don’t focus consistently on the social factors of production and trade for their purchasing decisions. Additionally there is further regulatory scope at the international, European, and national levels to establish frameworks fostering equality in global trade and sustainable development. Finally, the Fair Trade movement itself still has potential to increase the impact of fair trade activities and thereby

<sup>1</sup> German non-profit limited organisation Engagement Global – Service für Entwicklungsinitiativen (Service for Development Initiatives). Public body, subdivision of the German Ministry for Development Cooperation <sup>2</sup> Bread for the World – Protestant Development Service globally active development and relief agency of the Protestant Churches in Germany <sup>3</sup> MISEREOR – the German Catholic Bishops’ Organisation for Development Cooperation <sup>4</sup> German Fair Trade Platform <sup>5</sup> Foundation of the German Social Democratic Party

contribute to further social change. To realise such potential, the study suggests an even closer coordination between Fair Trade protagonists as well as a strengthening of strategic co-operation with other (civil) society actors.

# 1. Introduction

The Fair Trade movement is united by a vision that focusses on fairness in international trade and sustainable development. From the beginning, fair trade was dedicated to educational activities and raising awareness. Hence under fair trade, trading has always been connected with information and educational activities, campaigning, and political work. Implemented by various bodies, these measures were aimed at promoting fair trade in civil society, at education institutions, at contracting public authorities, in municipalities, trade, with manufacturers and consumers.

Despite its more than 40-year history, there hasn't yet been a comprehensive understanding of fair trade's impact in consumer countries like Germany. While there have been numerous scientific studies, evaluations and reports<sup>6</sup> on fair trade's positive impact on the structural, ecological and above all social living conditions in producer countries<sup>7</sup>, the impact of fair trade in consumer countries is not well understood. This study dedicates itself to exactly the latter. It is designed as a **trend and impact study**. Its key objectives are, firstly, to present trends and changes in fair trade in Germany between the years 2000 and 2015. Secondly, the Fair Trade movement's contribution to these changes (i.e. the impact of fair trade) was examined. Therefore the following overarching **hypothesis** needed to be verified:

*“Since 2000 the awareness and behaviour of various actors have changed according to fair trade aims. The Fair Trade movement has contributed significantly to these changes.”*

Here, fair trade was perceived as a **concept** of a special kind of trade and trading practice – i.e. it advocates an alternative trading model. It aims at trade justice and sustainable development based on certain fair trade criteria and principles (WFTO/ FLO 2009; see box on page 6).

## Fair trade

- enables market access for marginalised producers,
- maintains long term, transparent, and partnership-based trade relations and eliminates unfair intermediaries,
- pays producers fair prices that cover their costs of production and living expenses, and offers pre-financing on request,
- empowers and ensures rights of producers, especially small-scale farmers, workers and their organisations in the Global South,
- contributes to capacity building among producers and trading partners in the Global South,
- ensures production complies with core ILO Conventions,
- safeguards the rights of young people and fosters equality for women,
- promotes environmental protection, for example by switching to organic farming,
- does educational work and runs political campaigns to make the rules of world trade fairer,
- ensures compliance with its criteria through monitoring procedures.

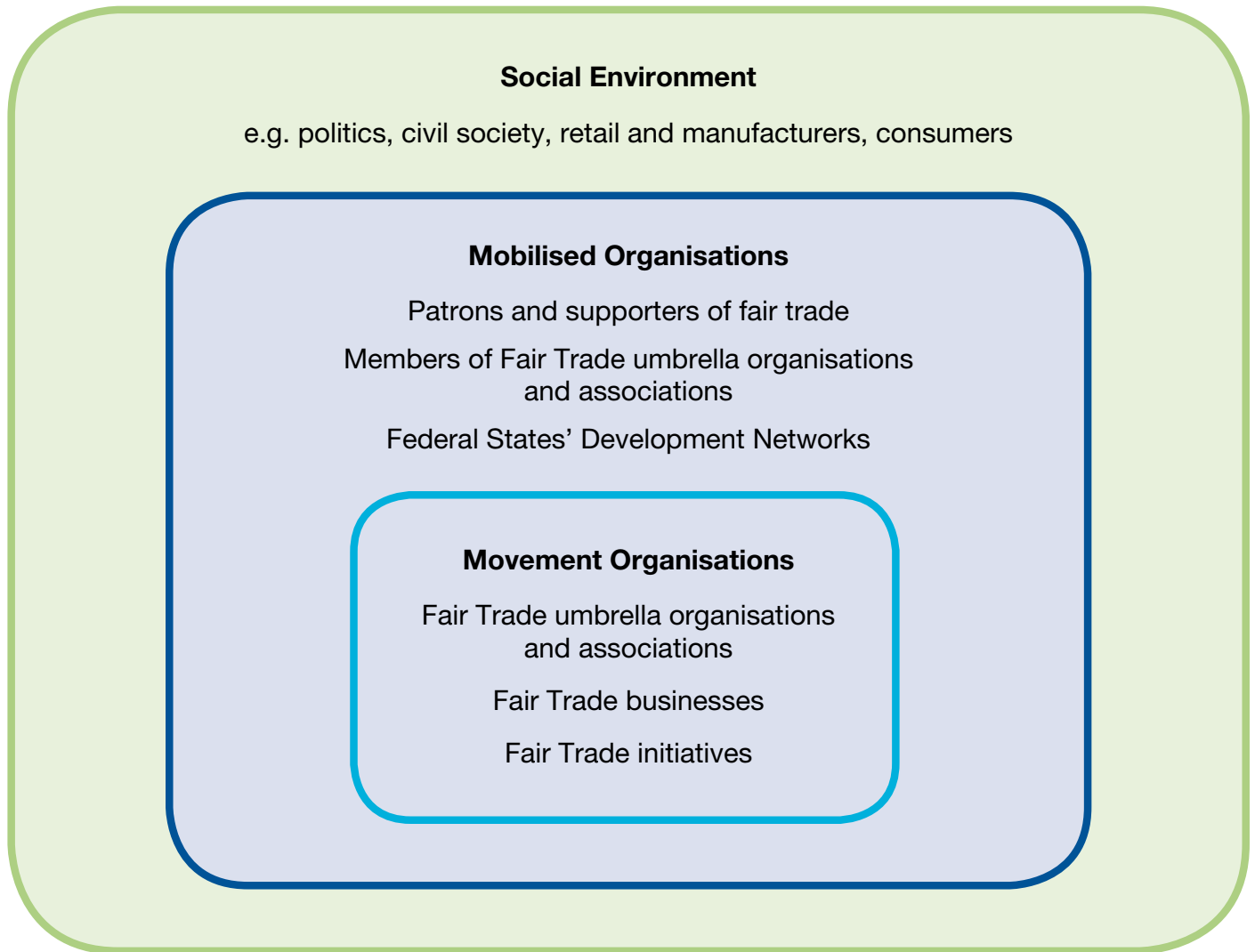
The **movement** promoting fair trade in Germany spans a variety of different actors and is highly heterogeneous. The study examined organisations whose main focus is on fair trade (so called social movement organisations – see diagram on page 7), as well as those for whom fair trade is one of their key areas of work, and who are significant supporters of and/or mobilisers for fair trade (so called mobilized organisations, see diagram on page 7).

It was the aim to investigate the changes and impact of the Fair Trade movement on six **key fair trade targets**: Fair Trade companies, Fair Trade umbrella organisations and associations, civil society, the public sector and politics, manufacturers and retailers, as well as consumers.

<sup>6</sup> In the interest of an easier understanding the following text only uses short versions of the publishing organisations' names

<sup>7</sup> See CEval 2012, Coder 2013, Dragusanu et al. for example 2014.

Figure 1  
The Fair Trade Movement in Its Social Environment



## 2. Fair Trade in a New Millennium – Trends and Developments

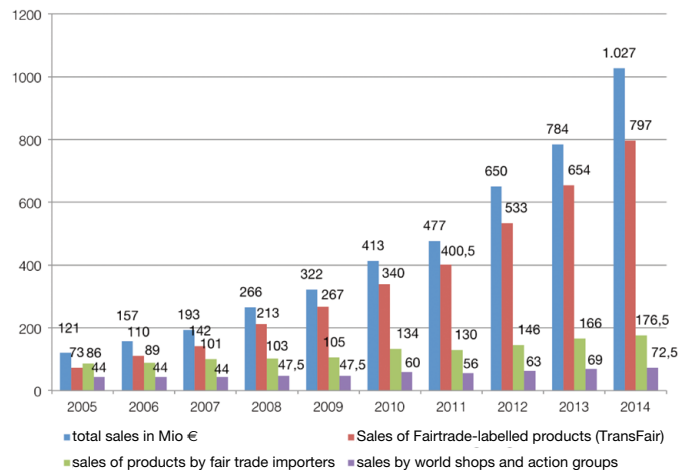
In Germany fair trade and its movement began in the 1970s with the foundation of the so-called **Aktion Dritte-Welt-Handel** (“Third World Trading Initiative”). The campaigners’ idea was to raise awareness for conditions in third world producer countries by selling their products. Originally focussing mainly on educational work, over time the Aktion Dritte-Welt-Handel developed into the so-called **alternative trade** and finally into today’s **fair trade**. In addition to the educational work approach, in recent times the actual trade with goods from developing countries under fair terms has gained increasing importance.

In this context, efforts have been made to **expand** the trade of fairly produced goods from the late 1980s, after a long period of sales exclusively by special groups of volunteers and in world shops. The introduction of the TransFair mark (today: Fairtrade mark) in 1992 enabled consumers to identify fairly traded products at mainstream food retailers. This paved the way for the distribution of these products through mainstream retailers, which, in turn, allowed mainstream manufacturers to add fair trade products to their range and opened up new sales opportunities for producers from the Global South.

Since then, fair trade and its movement have developed quite dynamically. The initial years of the new millennium were dominated by efforts to establish new structures and consolidate existing ones. At that time, Fair trade wasn’t yet widely established in society, which was why the Fair Trade movement channelled their resources mostly into raising awareness and advertising fair trade. This is when the **“Faire Woche”** (Fair Trade fortnight) was born, a nation-wide campaign of activities in connection with fair trade, which still takes place annually in September. Additionally a major public campaign named **“Fair Feels Good”** was conducted around that time, which, like Faire Woche, aimed to raise awareness for fair trade in Germany and boost sales of fair trade products. The discount retailer **Lidl** began its commitment to selling fairly traded goods around that time as well. Not only did this create significant new sales opportunities for fair products, but it also led to much controversy within the Fair Trade movement.

Figure II

Sales performance of fair trade 2005 – 2014, in million Euro



From the mid-2000s a period of strong **growth** followed, and fair trade developed into an increasingly differentiated and professional economic sector, with broader participation from a variety of actors besides the traditional protagonists of the movement. Both mainstream manufacturers and retailers, as well as a steady growing number of dedicated Fair Trade retailers, entered the market and sales increased notably. In view of these changes, and to secure a stake in further developments, the Fair Trade actors needed to transform their own frameworks and areas of activities (see chapters 2.1 and 2.2).



## 2.1 Fair Trade Umbrella Organisations and Associations

Like fair trade itself, the umbrella organisations and associations have evolved into a broader and differentiated landscape of Fair Trade actors, with institutions like the Forum Fairer Handel (founded 2002) and the recently created Fair-Band (wordplay with the German expression for association, suggesting a short form of Fair Association, founded 2013). Together with the Weltladen-Dachverband (WLDV, an umbrella organisation of German world shops) and TransFair there are currently four nationwide, membership-based non-governmental organisations, which focus on fair trade and in each case fulfil specific tasks in this area.

The **Weltladen-Dachverband**, as a voice (of a part) of the world shop movement in Germany, focuses on fair trade in world shops. Meanwhile, it is **TransFair's** key concern as national Fairtrade organisation to foster the expansion of fair trade in retail. The **Forum Fairer Handel** sees itself as the political voice of fair trade in Germany, and the **Fair-Band** as platform and representation of small and medium Fair Trade import organisations.

The three older organisations have changed considerably since the year 2000. Firstly they have consolidated their organisational structure and created new human and financial **resources** for their fair trade activities. Secondly they thereby laid the foundation to expand and intensify their respective tasks. With differing priorities, the three organisations reinforce each other's efforts in public relations and marketing – on the one hand targeting consumers and the demand side; retailers and manufacturers – on the supply side – on the other.

Furthermore, in light of the growing variety of stakeholders in fair trade, reflecting and enhancing **principles and criteria** of fair trade became an increasingly important field of engagement for WLDV, Forum Fairer Handel and TransFair. In this context, the strengthening of **monitoring** and **verifying practices** plays a vital role to ensure reliable compliance with fair trade requirements. The Fairtrade system is also subjected to the ISO (International Standards Organisation) standard 17065 requirements for bodies certifying products, processes and services and since 2002 to the ISEAL (International Social and Environmental Accreditation and Labelling Alliance) Code of Good Practice for Setting Social and Environmental Standards.

Through these efforts fair trade has been distinguished from imitators, has become regarded as a tool for sustainable development, whose credibility is secure and verifiable. From around 2010 Fair Trade associations and umbrella organisations intensified their **political activities**, although fair trade was expanding continu-

ously, political and structural barriers to fairer global trade continued to exist.

Despite their different roles and their slightly different approaches to fair trade, WLDV, Forum Fairer Handel and TransFair still cooperate in various areas, particularly on an operational level. For instance, they jointly participate in the annual “Faire Woche” (Fair Trade fortnight). There has hardly been any strategic co-operation within the investigated period and the institutionalised exchange between the organisations was even reduced in this period.<sup>8</sup>

Under such circumstances there is a great potential for synergies to foster fair trade that remain untapped.

## 2.2 World Shops and Fair Trade Companies

Fair trade's expansion to mainstream manufacturing and retail, as well as the emergence of new Fair Trade companies and speciality shops, gained significant momentum in the 2000s. This development challenged traditional Fair Trade companies to position themselves in an increasingly complex and competitive environment. Importers and world shops therefore felt the need to **distinguish** themselves from newer competitors. There was a particularly strong wish to distance themselves from the product-oriented fair trade, at the beginning mainly represented by TransFair and its licensees combined with the Fairtrade mark, and to emphasise the specific characteristics of the business-oriented fair trade of Fair Trade retail importers and world shops. Among others this led to stronger self-marketing of importers and emphasis of the “World Shop” brand.

<sup>8</sup> On the one hand there were organisational overlaps for nearly all of the assessment period between the three organisations: TransFair was a Forum Fairer Handel member until 2013, the WLDV was member of TransFair till 2014 and is also a member of the Forum. On the other hand a trend of differentiation between the organisations became clearer within the assessment period. Thus TransFair decided in 2013 to end their membership in the Forum, but still contributes as network partner in the Forum's working groups. 2014 the Weltladen-Dachverband umbrella organisation of German world shops) chose to terminate its TransFair membership (INT).

In the context of this study, **business-related fair trade** refers to the path of Fair Trade, represented by world shops and Fair Trade companies like GEPA, El Puente, dwp, Contigo and others. This approach aims for fair business and trade practices and compliance with the principles of Fair Trade in regards to all products and business areas. Whereas **product-related fair trade** denotes a form of Fair Trade in the context of this study, based on the certification and labelling of selected products. Businesses striving for certification of some of their products must ensure compliance with the relevant product standards regarding production and trade of these products, and allow independent audits.

Another development in connection with the desire to create a distinct profile was the trend towards a strengthening of **transparency and verification**. The organisations’ own expectations towards their fair trade work and compliance with fair trade criteria should be comprehensible and verifiable for outside observers. For this reason, measures such as monitoring systems were adopted and memberships in recognised Fair Trade networks and associations established, like the World Fair Trade Organization (WFTO), which introduced a Fair Trade guarantee scheme and a corresponding logo in 2014. Furthermore several importers increasingly used the label „Naturland Fair“ for certification of their products. This was introduced in 2010 as a combined organic and fair trade label, and also allows certification of products from the global North.

Finally, the professionalisation of structures and processes became inevitable for Fair Trade importers as well as for many world shops in an ever denser market environment. With the growth of fair trade, for example, customer profiles of world shops and importers changed towards higher expectations, greater awareness of quality, and more critical attitudes. It became not only necessary to focus on fair trade target groups, but also to find new ways for marketing and developing product ranges. Furthermore this also necessitated the professionalisation of the actors’ own structures. For some world shops this triggered a stronger positioning as dedicated “Fair Trade specialist retailers” with a contemporary shop layout, attractive central locations, and trained sales staff. Being supported by mainly non-profit initiatives, the world shops were expected to demonstrate their roots in civil society and continue as a home for development education at the same time.

## 3. Social Change and Impact of Fair Trade in Germany

Not only among Fair Trade actors, but also within the Fair Trade movement’s social target groups, several changes regarding fair trade issues occurred between 2000 and 2015. Promoted by public relation efforts and the increased visibility of fair trade products and shops, fair trade’s recognition rose. Its convincing concept and targeted marketing attracted an ever broadening range of actors and fair trade started reaching beyond its established target groups. In many ways the Fair Trade movement has contributed significantly to this development, not least since their protagonists and other supporters from civil society evolved dynamically (see chapters 2 and 3.1). On the other hand overall social developments and other social groups added to this as well, influencing each other in a complex interplay.

### 3.1 Civil Society: Fair Trade’s Target Group and Multiplier

The strengthening of civil society involvement is one of the primary concerns of Fair Trade’s protagonists in Germany. Firstly, this should strengthen the work of the Fair Trade movement itself. Secondly, the movement hopes for the support of wide parts of the public, who are mobilised for their concerns. Thus changes in society should be achieved in areas like trade, consumers or policy making.

The **Christian relief services** Brot für die Welt (Bread For The World) and MISEREOR as well as Evangelical and Catholic **youth organisations** (Arbeitsgemeinschaft der Evangelischen Jugend, AEJ and Bund der Deutschen Katholischen Jugend, BDKJ) continue to be important supporters and multipliers of fair trade, and are therefore a crucial pillar of the Fair Trade movement. They participate in various Fair Trade organisations and networks, promote development education on fair trade topics, and integrate fair trade in their public relations work and political lobbying towards policy makers and business representatives. In addition, the above-mentioned organisations strive to act along the principles of fair trade and thus to achieve a changeover for church structures and institutions to eco-fair consumption. Finally, they are particularly trying to enshrine the issue of fair trade in the active ecclesiastical environment, and to offer it as a model for intervention.

This model is used by the so-called **church action groups** for example, which, together with the world shops supported by members of the civil society, constitute an important constant of fair trade’s support base. These groups have been involved from the early beginnings in the 1970s, particularly through selling fair trade goods in their parish and beyond. Though there are still

many such sales groups, some of them have withdrawn from fair trade within the last 15 years. With the spreading of fair trade into mainstream retail, these sales have become less attractive as a form of action. In the same way as the world shops, it is increasingly difficult for action groups to attract young volunteers for fair trade, which is why there is often a lack of human resources.

Nonetheless engagement in fair trade by civil society members has risen since 2000 due to integration of and networking activities with new actors. On a regional level the 16 federal states gained relevant multipliers with the increasing emergence of Federal States’ **One World Networks**. As higher level structures, these regional networks link local development actors from the respective area, advise them and offer qualification activities – as well as giving the federal development scene a voice towards federal and communal policy makers, in order to assert political demands. Often the world shops had brought fair trade into these (new) structures as field of activity. After some regional networks’ support, mainly of public relation activities for fair trade through large-scale federal campaigns in the early 2000s, fair trade became increasingly integrated into the various activities of the networks. Hence the one world networks, which exist in all German federal states, are often the designated Fair Trade advisor, supporting actors such as the Fair Trade action groups and world shops. Some regional networks have created special positions to deal with fair trade issues through the One World Promoter Programme of the federal government and the federal states. Additionally they take up fair trade in their lobbying activities on development issues, for example to draw up development guidelines for the federal states, or to demand sustainable and fair public procurement.

And also on a local level, civil society’s support for fair trade has pluralised in the assessment period. Here **schools** are an increasingly interested target group, requesting information, education, and consulting activities more frequently, and taking up participation offers and fair trade activities more often. An ever growing number of schools recognise fair trade as an educational tool and a field for practical experience, although there is still significant potential to be realised. Fair trade is rarely an explicit part of federal curricula, and, as a rule, is mostly an optional subject. Nevertheless, fair trade has become a more popular item in school education than it was at the start of the assessment period, especially in the context of education for sustainable development. Fair trade offers multiple connections to other subjects and helps to gain better insight into complex and abstract issues of the global economy, development and equality. Additionally there seems to be a trend at schools to experience the issue of “fair trade” first hand, for example through opening up one world school shops or school world shops, setting up stalls, or establishing regular

topical activities. Besides all this, some schools use fair trade for their profiling. It is an ideal tool for such purpose, not only due to its positive reputation, but just because it can be integrated as a common thread through various areas of school life (lessons, projects, school canteen, etc.).

In addition to developments in education policies and factors for schools, the **Fair Trade movement** has contributed as well. In regards to lessons, more accessible materials and information for teachers and pupils have proven particularly crucial. Actors like the Forum Fairer Handel, TransFair, Fair Trade e.V., the initiative „Jugend handelt fair“ (“young people act/trade fair”), the Protestant and Catholic youth associations, as well as the local world shops (together with additional global learning actors) contributed above all through the development, pooling, and systematic distribution of materials. Targeted approaches by members of the Fair Trade movement to invite participation in Fair Trade campaigns, days of action, or school competitions, have also inspired practical engagement.

In addition to the regional networks and the world shops, Fair Trade initiatives and schools on a local level, fair trade receives support from further organisations and groups rooted in civil society. Many **non governmental organisations** (NGOs) in the areas of development and environmental policy, unions and consumer protection initiatives share the basic concerns of fair trade, which is why there are numerous thematic overlaps – though these haven’t yet led to a very close political cooperation. In the course of the assessment period, however, an increasingly differentiated and critical attitude towards fair trade has formed within the NGO sphere. While consumer rights organisations advocate changes in respect to transparency and labelling of fair trade products for consumers, environmental groups complain mainly about ecological issues in fair trade. Apart from these, there are also voices with a more fundamental criticism, who focus on standards and requirements of fair trade, while, at the same time, criticise the political activities of Fair Trade actors for being too tame. Seeking closer political alliances would actually offer the potential to expand each other’s respective impact. Such potential hasn’t yet been fully realised.

### 3.2 Politics and Public Sector: Partner and Addressees for Demands

Policy makers and the public sector are two important target groups for the Fair Trade movement’s activities. Firstly, one aim is to gain interest and support for fair trade. Secondly, the focus is on impacting political frameworks regarding global trade justice and sustainable development. Thirdly, public administration practices have gained increasing public attention within the assessment period, and with it the fair (socially acceptable) conduct of public procurement.

The study concludes that by 2015 fair trade received broader **support** on all political levels than at the beginning of the assessment period, which is due, among other things, to its rise in popularity, its positive reputation, as well as its ability to connect to various political issues. In particular the German Federal Ministry for Economic Cooperation and Development (BMZ) and the Service Agency Communities in One World (“Servicestelle Kommunen in der Einen Welt”, SKEW) on behalf of the BMZ have evolved into promoters and advocates of fair trade. While for the BMZ fair trade serves mainly as a vehicle for educational work on development politics and a tool for the realisation of social standards, the SKEW finds opportunities for connections in regional development policy and fair public procurement.

Overall, increased political support for fair trade is expressed in perceptible verbal appreciation and endorsement. In the case of the BMZ it is also noticeable in increasing financial support from the ministry, hitherto mainly for educational work on development politics by Fair Trade actors (see table, page 13). Contributing factors to this development in the recent past have, on the one hand been political priorities that attach more importance to issues like social and environmental standards. On the other hand the Fair Trade movement promoted this development through its actors in regular exchanges with the BMZ, at all levels of the ministry, including its executive.

Table I

## Development of BMZ funding for fair trade 2011-2015

All figures in €

Year	Funding total for educational work on development politics	Funding for programmes supporting Fair Trade	Percentage funding for fair trade compared to total funding
2011	11,845,000	587,568	5 %
2012	19,783,000	1,098,000	6 %
2013	18,591,000	895,936	5 %
2014	21,142,000	2,139,000	10 %
2015	23,925,000	2,632,000	11 %

The awareness of and support for fair trade has also increased on a local level since 2000, where there are strong connections with fair trade through Local Agenda and municipal sustainability efforts. Though this trend is not yet a major one, it is reflected in increasing participation in fair trade activities like the rising number of municipalities that have aspired to achieve and did achieve the title Fairtrade Town, or have participated in the competition “Hauptstadt des Fairen Handels” (Capital of Fair Trade), organised by the SKEW. At least those municipalities participating in such activities seem to focus on this issue, reflected above all in more information and publicity work about fair trade, increased awareness for “fair public procurement”, and stronger ties to civil society actors regarding fair trade issues. A major influencing factor behind this development is often the involvement of individual organisations or individuals from civil society, politics and public administration. Again and again, the study highlighted the crucial role of local world shops, as well as One World initiatives and providers of development education as drivers of this commitment. In addition, it became apparent that campaigns like TransFair’s Fairtrade Towns and the SKEW’s competition “Capital of Fair Trade” provided the impetus for municipal engagement.

Despite a general endorsement of fair trade and its concerns, the structural changes of **regulatory frameworks** sought for by fair trade have not been achieved in the assessment period. Fairer trade between the so-called Global North and South as well as fair production conditions constitute the original common benchmarks of the Fair Trade movement, though there is much more common ground about issues like human rights, food security, rural development, and so on. Indeed, concerns like sustainability and the issue of international standards and responsible supply chain management in particular have gained political relevance within recent years. For example, the Sustainable Development Goals (SDG) as well as the UN Guiding Principles on Business and Human Rights have been positive approaches. However, voices from the Fair Trade movement and other civil society ac-

tors criticise the lack of binding regulations for responsible business practices and the reliance on solely voluntary commitments. Even though the EU’s trade strategy from 2015 commits to promoting its values through sustainable and fair trade policies, the principles of trade liberalisation and deregulation still dominate in European and International trade policy, and are reflected in the proposed bilateral and multilateral free trade agreements such as CETA and TTIP.

Despite the lack of structural or political change there have been various developments in German politics, which together suggest increased concern about issues advocated by fair trade. Apart from rising awareness of sustainability, social standards and responsible supply chain management, sustainable (fair) public procurement in particular needs mentioning in this context. **Fair public procurement** refers to socially responsible procurement, whereby social criteria like compliance with the core ILO (International Labour Organization) Conventions are taken into account. The most significant change observed in relation to public procurement in Germany is the reform of the legal framework for public service contracts at the European, federal, regional and local government levels. Until recent years, public procurement relied almost exclusively on criteria like the suitability of a product or service, and its economic efficiency. However, in the course of the assessment period it became possible to take into account environmental and social criteria, due to various reforms of the European public procurement directives, the adjustment of the German act against restraints of competition (Gesetz gegen Wettbewerbsbeschränkungen, GWB), the development of laws on collective bargaining and public procurement in the federal states, and the review of municipal procurement guidelines. There are multiple reasons for this development. In addition to political power structures, the efforts of various civil society initiatives have also contributed to these reforms.

The (social) sustainability of procurement practices is difficult to assess, due to a lack of reliable data about public procurement in

Germany. However, the study has succeeded in generating estimations on changes in procurement of local governments within the assessment period. Its findings suggest a gradual trend towards fair procurement. According to several experts this development is still in its initial phase, and the extent of the change is minor. Moreover, fair procurement is typically limited to certain product ranges (besides fair trade classics like coffee, tea, chocolate and flowers: occasional sports balls, natural stones and textiles).

Various factors have contributed to the observed timid advances, such as a committed civil society. Specialised organisations like the Christliche Initiative Romero (Christian Initiative Romero - CIR), WEED (World Economy, Ecology & Development) or Femnet should be highlighted in this context, most of which operate beyond the realm of the Fair Trade movement. They have promoted the practical implementation of fair procurement on a municipal level, for example through activities like information services and guidance, as well as through hands-on projects with several municipalities. Several actors from the **Fair Trade movement** were able to contribute at various levels as well, however. Firstly, their work for fair trade generally leads to the availability of verified socially sustainable products, with an ever broadening range and in response to the needs of public bulk consumers. Moreover, through activities such as the initiation of and participation in campaigns like Fairtrade Towns or the “Capital of Fair Trade” competition, the Fair Trade movement has contributed to intensified public relation activities, public awareness and increased acceptance of the issue of fair procurement in public administration in several municipalities, which has proven an important prerequisite for a fair procurement practice. Such processes were occasionally able to strengthen the co-operation between public administration, politics, and civil society, which has also proven to be a success factor in those municipalities that progress in the area of socially sustainable procurement.

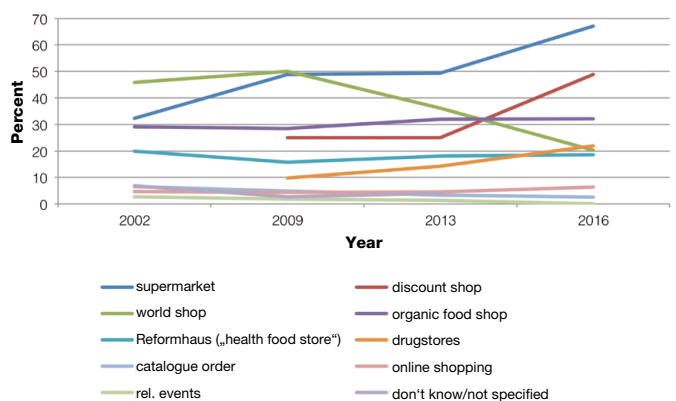
Overall though, municipal procurement practices have so far lagged behind the established legal possibilities, so that there is still significant potential for increased commitment from Fair Trade actors.

### 3.3 Retailer and Manufacturers: Engine of Growth and Target

Throughout the history of fair trade, conventional retailers and manufacturers have increasingly developed into a key target group for fair trade. Firstly, they had to be convinced to add fairly traded products to their range, and to take part in fair trade, thereby facilitating a wider distribution. Furthermore, the aim was to change general commercial practices of manufacturers and retailers in Germany, so they comply fully with the principles of fair trade and not merely in respect of a (limited) range of fairly traded products.

As a matter of fact, fair trade has **grown** significantly among conventional manufacturers and retailers since 2000 – as is indicated by a considerable increase in sales, rising numbers of sale outlets selling fair trade products, as well as by a broader product range and product variety.

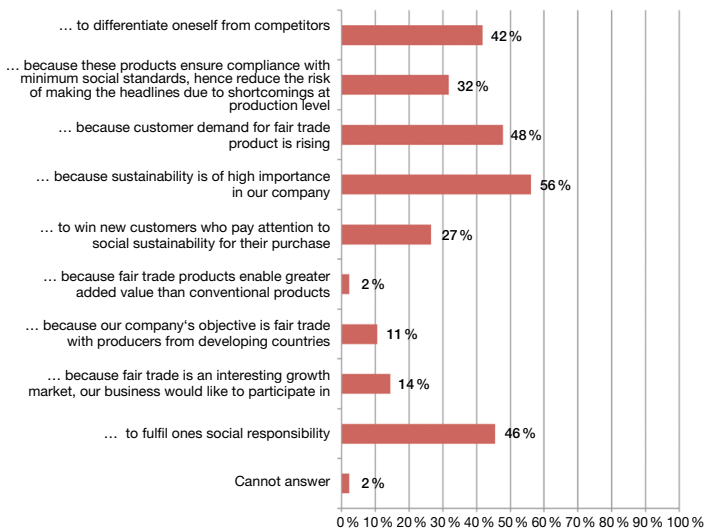
Figure III  
Points of sale for fair trade products



The food sector exhibited particularly strong growth, amounting to approximately 80 percent of fair trade sales in Germany. Despite the huge growth, which sometimes reached annual growth rates of more than 30 percent in the assessment period, fair trade is still a comparatively small niche, accounting for less than one percent of total German retail sales.

Figure IV

Reasons for manufacturing of fair trade products or for adding them to the range of products on offer



Source: online survey of TransFair licensees

This makes it all the more remarkable that more and more businesses are deciding to offer fair trade products, and indeed that a commitment to fair trade is even seen as an investment by some of them. Fair trade however presents itself as compatible with the economic objectives and sustainability efforts of businesses, which makes it a practical option for a growing number of businesses. Apart from communicating their sustainability commitment, it serves businesses as a tool to implement a sustainable product policy for a certain range, and, furthermore, as means of differentiation within an increasingly concentrated and competitive German food retail trade. Also customer demand for such products has influenced business decisions to offer fair trade products. However, the study also shows that customer demands haven't reached an exceptionally high level yet (see chapter 5.4). Instead the change on the supply side, where large market players put their competitors on the spot by introducing fair trade products, seems to be of significant impact on businesses' decisions to engage in fair trade.

Apart from incentives for businesses and fair trade's compatibility with their sustainability agenda, the **Fair Trade movement** has also contributed to the changes described above. The availability of a suitable quality and quantity of fairly traded goods, for example provided through GEPA, the only long-established German Fair Trade company with a large-scale presence on the shelves of German retailers, played a significant role – as did the increased

professionalism of actors like the national Fairtrade organisation TransFair. The latter succeeded in convincing a rising number of businesses to become licensing partners, through its marketing activities targeted at businesses, and through selective networking with industry and corporate representatives. Additionally the Fair Trade movement has managed to raise public awareness for fair trade and created a positive and, above all, credible image, which increases its appeal to businesses.

Though fair trade products have seen widespread distribution across food retailers, fair trade and the Fair Trade movement failed to extend their principles to retail **business practices** on a broader scale. There haven't been any fundamental changes to retailers' business practices within the assessment period, according to a number of observers. Instead, there have been several indicators of unfair business practices in the past, and of disruptions in certain product ranges. Pricing pressure, for example, is seen as one of the reasons why basic social standards are often violated at production facilities in supplier countries in the Global South. Some interview partners mentioned that competition and price pressures on the market had actually increased over the assessment period.

However, in recent years issues like social sustainability and global supply chain responsibility have noticeably gained importance against a backdrop of events like Rana Plaza, their media coverage and public discussions by NGOs – also from the Fair Trade movement – as well as due to increased media coverage of production conditions in developing countries. Therefore there are at least some approaches in the trade to build more responsible supply chains. They range from the shortening of their own supply chains, through voluntary codes of conduct, corporate codes or guidelines from retailers to their suppliers, one-off participations in capacity building activities for suppliers, increased sourcing of raw materials that have been produced in a socially responsible way, and to the implementation of certification schemes like those of the product-related fair trade. The review mechanisms behind certification schemes like Fairtrade or Naturland Fair, which monitor compliance with the respective social and ecological standards, make the vital difference in comparison to many other voluntary measures by the industry, where independent audits by a third party are not a given.

The reasons for this development are, again, many and varied. On the one hand there are, in part, very clear economic business interests, such as avoiding negative media coverage or securing scarce resources. On the other hand, in several expert interviews owner- or family-run companies also attested that they acted out of a certain social responsibility and conviction. But what is the

role of fair trade and the **Fair Trade movement** in this all? According to the results of this study, their contribution lies less in creating targeted pressure on policy makers and businesses, but rather in influencing the public discourse. Increasing sales of fair trade goods, to which Fair Trade actors have actively contributed, have sent a message to the industry that a growing, albeit so far limited, consumer segment cares about fairness in trade and raised awareness, according to several business representatives, for fair trade issues. Furthermore Fairtrade’s accommodation of business requests to be allowed to use single certified ingredients covered by the Fairtrade standards – seen as a controversial step within the Fair Trade movement – can be considered as a contribution to the trend towards more social responsible sourcing. With the existing, established, Fairtrade system and the introduction of the sourcing programmes, Fairtrade offers businesses a solution for their supply chain issues and therefore a practical option.

### 3.4 Consumers: Market Participants and Citizens

From the very beginning, consumers have been one of the most important target groups in fair trade. The objective was and is firstly to create awareness in this group for the reasons and importance of fair trade, and secondly to influence their shopping behaviour towards fair consumption. Finally, they should be mobilised in their capacity as citizens to actively support the fair trade cause.

The study concluded a positive development for **awareness of fair trade issues** in Germany. This was not only confirmed by numerous experts from fields like politics, the economy and civil society, but could be underpinned with empirical data. Telephone interviews revealed that many people have an at least basic knowledge of fair trade, associating it closely with fair wages (in developing countries), fair prices for producers (in developing countries) and fair working conditions.

Without a doubt, there are a number of social factors contributing to people’s awareness of fair trade issues. International political processes like those around the Millennium Development Goals (MDG) or the Sustainable Development Goals (SDG) should be mentioned in this context, as well as an intensified media coverage of problems and developments in the Global South, and the availability of new information and communication technology, which have in turn shortened the distance to what is happening in other parts of the world. Also the Fair Trade movement has contributed as well, though with mixed results. On the one hand the movement has undertaken lots of public relations and information activities about fair

trade and questions of a fair global trade, throughout the assessment period. On the other hand the study’s results suggest that the reach of these activities has been limited, which is why these efforts – in contrast to the other factors mentioned above – can only serve as part of the explanation.

Regarding the change in **shopping behaviour** of consumers in Germany, the study concludes that there has been an increased interest in buying fair trade products since 2000, and that new groups of consumers were won among the buyers of fair trade products. The percentage of those surveyed who claimed to buy fair trade products in the survey has almost doubled throughout the assessment period – although these figures should be interpreted with caution, particularly in relation to the actual sales figures and market share of fair trade products in retail. Socially desirable response behaviour often leads to assessment biases and there is still a discrepancy between self-reported and actually observed fair consumption.

In search of the causes for this development, the study looked at the supply side and concluded that the increased availability of fair trade products in German retail, greater public awareness and improved recognisability of products, as well as fair trade’s high credibility significantly contributed to this development. The Fair Trade movement has made relevant contributions to all these aspects, among other things, through efforts such as marketing and public relations activities, in addition to monitoring, transparency, and verification, thereby creating the necessary conditions for increasing the number of buyers.

On the other hand consumer demand itself has to be taken into consideration. In this context the study’s assessment suggests that besides socio-economic factors, the main reason appears to be a general shift in values among consumers. Though the sustainability of a product – compared to other criteria like price or brand – is usually not the crucial factor for the decision to purchase, it is still a factor considered by an increasing number of people. Fair trade satisfies several facets of sustainability, and Fair Trade actors have also managed to incorporate specific sustainable consumer trends into their product marketing. Thus new groups of shoppers could be won for fair trade, broadening today’s spectrum of customers far beyond the “traditional world shop customers”. However, research about fair trade also shows there are certain social groups that are still more likely than others to buy fair trade products. The results of previous market research show a particularly high percentage of buyers among individuals with higher education, but especially low numbers among very young individuals (14 to 29 years), and individuals with a low net household income.



Besides their role as critical consumers, people are also citizens – not only capable of engaging in shopping-basket politics, but also of demanding changes from policy makers and economic decision makers through civic participation. This poses the question for the Fair Trade movement: how far are consumers willing to support fair trade? The telephone interviews showed that there actually is quite a **potential for support** among the general public for activities towards a fairer global trade. However, these are mainly limited to buying fairly traded products and forms of action with easy participation, like signing petitions. Hence the Fair Trade movement’s challenge will be to increase the existing potential through appealing participatory activities.

## 4. Fifteen Years of Fair Trade in Germany: A Synthesis

As shown above, fair trade and its actors have developed quite dynamically within the last 15 years, and indeed have opened up new areas of social influence. Promoted by large-scale public relation efforts and the increased visibility of fair trade products and shops, the popularity of fair trade increased. Its convincing concept and targeted marketing attracted an ever broadening range of actors and fair trade started reaching target groups beyond its established ones. Due to its increased presence, people today come in contact with fair trade more often in various contexts, from daily shopping, to hotel or restaurant visits, at school, public services, in church parishes, and other public places.

The actors of the Fair Trade movement have contributed significantly to this development. At the same time, social change around fair trade, and within its target groups in particular, has influenced Fair Trade activists in turn. In particular, during the assessment period the following developments were identified within the movement:

### **Fair Trade umbrella organisations and associations**

- The Forum Fairer Handel established in 2002 became a relevant umbrella organisation for fair trade, complementing the work of TransFair and the Weltladen-Dachverband (umbrella organisation of German world shops).
- The three organisations serve different functions and cooperate in various areas. Synergies haven't been taken full advantage of, due to a lack of strategic coordination.
- All three organisations consolidated their structures within the assessment period, and broadened or enhanced the scope of their activities. Their efforts focussed particularly on public relations and marketing, as well as consolidating fair trade criteria, principles, concepts, and tools for monitoring and verification.
- Faced by persisting structural barriers on the way to fairer global trade, all three organisations had intensified their lobbying efforts for development issues by the end of the assessment period.

### **Fair Trade companies and world shops**

- The market environment for world shops and Fair Trade companies has become increasingly complex with the entry of new operators, who regard fair trade as an attractive business opportunity.
- With the rising diversification, expectations increased towards world shops and Fair Trade companies. They became more professional throughout the assessment period and paid closer attention to the demands of their target groups.
- They strengthened their own principles, criteria and unique

assets for the sake of profiling and for a better position towards new Fair Trade operators. They introduced and extended monitoring systems and review mechanisms.

### **Civil society supporters, multipliers and grass root initiatives of fair trade**

- Religious NGOs and youth organisations provide important continuity in fair trade, both as pillars of civil society support, and as a critical voice from the inside.
- Besides world shops, religious action groups form the foundation of the fair trade basis. Faced with the recent changes to fair trade it has become increasingly challenging for them to be competitive as attractive places of engagement.
- In some German federal states new collaborations have emerged with the regional networks within the assessment period. For many of them, fair trade has turned into a field of activity, whereby the regional one world networks became multipliers for fair trade.

In regard to fair trade's external target groups, we were able to observe developments – or at least positive approaches – in several areas in line with the changes sought by fair trade. In other areas there is still clear inertia posing an obstacle to fundamental change, and in these cases transformation processes were hardly noticeable. In particular the survey found the following:

### **Civil society**

- Within civil society, fair trade's most important role lies in development education. The literal tangibility of this topic and its compatibility with people's everyday lives makes fair trade attractive for many development educators.
- Through Education for Sustainable Development there is an increasing interest in fair trade at schools, where it figures as a tool for educational work, practical engagement and profiling. Fair trade's compatibility with school objectives and requirements, as well as the targeted provision of educational and participation programmes by the Fair Trade movement, are among the contributing factors to this development.
- There are clear overlaps of ideas and demands between the Fair Trade movement and other ecological, development, human rights and trade policy initiatives. These actors often acknowledge fair trade as an example of existing alternatives to the dominant practices in economy and trade.
- At the same time, there are more critical voices from civil society about the growing fair trade; such voices would appreciate a stronger political commitment of Fair Trade actors.
- Seeking closer political alliances with other civil society actors has the potential to expand the respective impact, for example by utilising the various networks of the actors for common

concerns. However, this potential hadn't been fully realised within the assessment period.

### Politics and Public Sector

- Fair trade now enjoys approval and support at all political levels. The BMZ (German Federal Ministry for Economic Co-operation and Development) and the SKEW (Service Agency Communities in One World), acting on behalf of the BMZ, developed into active promoters of fair trade during the assessment period.
- Since 2000, fair trade has received more attention at the municipal level in particular, offering compatibility with local agendas and local sustainable development strategies. Members of the Fair Trade movement have contributed to this through networking and suggesting specific activities.
- Fair trade has proven to be compatible with matters in many other policy areas, such as the debates on international social standards and responsible supply chain management, which have gained political relevance recently.
- In regards to fairer global trade, however, there hasn't been a significant change of the regulatory framework towards fair trade's aims within the assessment period – either at the international or the national level.
- At best, the field of fair public procurement profited from regulatory reforms and the commitment of numerous civil society initiatives demanding a change of procurement practices – even though fair procurement is currently far from being the norm. From time to time actors from the wider Fair Trade movement also contributed to changes, although they remained largely in the background compared to other initiatives.

### Manufacturers and Retail

- Fair trade has seen a considerable expansion among conventional manufacturers and retailers. Its concept is compatible with businesses' economic objectives and sustainability efforts. Due to their increasing professionalism, credibility and fair trade's positive image, its major actors increased the attractiveness of fair trade to retailers and manufacturers.
- Within the assessment period, social sustainability and responsible supply chain management became of ever greater importance for retail, particularly in the light of increased transparency shed by the media and civil society. In this context, the structures provided by product-related fair trade offer options for participation, and have been taken up by an increasing number of businesses.
- There hasn't been any fundamental change to the general rules and common business practices in German retail, however. Fair trade principles are not guiding mainstream trade.

### Consumers

- Consumers show an increasing awareness of fair trade. In addition to changing social parameters and other social forces like the media and civil society, the Fair Trade movement has contributed to this development through information and educational activities, as well as its public outreach.
- The public interest in buying fair trade products has increased since 2000, and new groups of consumers were won. The Fair Trade movement has strengthened the supply side through its marketing efforts, thereby creating a necessary requirement for an increase in buyers.
- Despite this expansion to new consumer groups, a clear discrepancy is noticeable between self-reported purchasing behaviour and actual sales figures. Fairness in production and trade constitutes just one of many criteria for the decision to buy – and for many this is not the most relevant factor.
- There is a certain amount of support in the population of activities to promote fairer global trade. However, this is mainly limited to low-threshold activities. The challenge lies in generating even more support through offering appealing ideas for engagement.

The study concludes that several changes towards fair trade objectives could be observed for the assessment period of 2000 to 2015. For civil society, politics and the public sector, for retailers and manufacturers as well as for consumers, a trending change in awareness was notable, albeit to a different extent for each group. Moreover, the study's results suggest that the Fair Trade movement has added a relevant contribution to this development through its information and educational activities, as well as its public outreach, its networking with various societal actors, its political lobbying and campaigning, in addition to other social forces. Depending on each actor's area of activity, the extent of their contributions varied. Nonetheless, it remains to be said that much persuasion still has to be done to actually achieve structural change.

Engaged Fair Trade supporters' efforts benefit directly from the increased importance that sustainability issues have gained both globally and nationally within the assessment period. At the same time, fair trade stimulates the debate about sustainability. It combines all three pillars of sustainability – environmental, social, economic – in its concept. Despite the fact that not all of the potential has yet been realised, fair trade proves to be compatible for a number of actors concerned with sustainability issues.

## Analytical approach, methods and practical implementation

This commissioned study is basically a **pilot study**, since it is the first to examine the macro-social effects of fair trade in the Global North comprehensively, over a period of 15 years from 2000-2015. Though fair trade and the Fair Trade movement operate world-wide, in this case the focus lies on Germany in particular. Therefore the study is also designed as a **case study**, providing reference points for further studies in other countries.

Since the individual (consumers), institutional (Fair Trade umbrella organisations and associations, manufacturers and trade, public institutions, civil society) and systemic (for example trade policy, public procurement) changes fair trade strives for are located in the same area of intervention, where numerous external factors from outside the Fair Trade movement are in effect, an *attributional analysis*<sup>9</sup> in terms of a clear assignment of impact to fair trade or to activities of the Fair Trade movement was not possible. Instead, and to take account of the complex interactions of various factors, the study is based on a **contribution analysis approach**. This approach aims to find out if a certain intervention can be plausibly identified as one of the causes which have contributed to the observed changes. To achieve this, an investigation is conducted into reasons for certain changes and the role of the respective intervention (in this case: fair trade and the activities of the Fair Trade movement) as well as into other influencing factors (for example political developments on a European or global level, activities of other social actors).

The study is based on a theoretical and participative approach and applied a balanced mix of methods. As part of the **data collection** a number of activities were conducted, including a comprehensive literature review, guided expert interviews, as well as focus group discussions, a semi-structured online survey with representatives of TransFair licensees, a semi-structured e-mail survey among German municipalities and telephone interviews with consumers (Computer Assisted Telephone Interview, CATI). For **data analysis** qualitative content analysis, descriptive and inferential statistics as well as time series analysis were applied.

The study was conducted in two phases: throughout the first, exploratory step changes and trends for the various target groups were documented, while in phase II the focus was on the impact and therefore the analysis of fair trade's / of the Fair Trade movement's contribution.

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<sup>9</sup> The attribution of impact demands that a clear allocation of observed changes to a specific measurement (cause) is possible. In this process usually the share of a specific cause in an observed change will be identified.

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For the full list of references please see the comprehensive version of the study, available at:

[http://www.ceval.de/modx/uploads/pdf/161124\\_A\\_Trend-und%20Wirkungsstudie\\_Ver%C3%A4nderter%20der%20Faire%20Handel%20die%20Gesellschaft.pdf](http://www.ceval.de/modx/uploads/pdf/161124_A_Trend-und%20Wirkungsstudie_Ver%C3%A4nderter%20der%20Faire%20Handel%20die%20Gesellschaft.pdf)

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## Imprint

This English version was published by TransFair e.V. (Fairtrade Deutschland)

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V.i.S.d.P. (responsible according to German press code): Claudia Brück, managing director TransFair e.V.

Concept and design:  
Dreimalig Werbeagentur, Cologne

Title photo:  
pixabay.de / geralt

Translation:  
Regina Volkmer, Translations and Communication Services

Druck:  
Thiekötter Druck, Münster. Climate neutral printing on 100% FSC-certified recycling paper.

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The full version of the study was published in German by CEval GmbH and is available in German at:

<http://www.ceval.de/modx/webindex.php?id=6>

<https://zenodo.org/record/163639#.WBnYX6t0rVI>

[https://www.fairtrade-deutschland.de/fileadmin/DE/mediathek/pdf/fairtrade\\_wirkungsstudie\\_gesellschaft.pdf](https://www.fairtrade-deutschland.de/fileadmin/DE/mediathek/pdf/fairtrade_wirkungsstudie_gesellschaft.pdf)

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