

Trade Fair Live Fair

Synthesis Report Year 1



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Executive Summary

Disclaimer: This Executive Summary was prepared by the Fairtrade Foundation on behalf of the 'Trade Fair, Live Fair' consortium. It does not reflect the views of the Fairtrade Foundation or any individual consortium member. If using content from this Executive Summary, please refer to the Terms of Use and the original source reports from which this summary has been drafted.

'Trade Fair, Live Fair' is the ambitious proposal of the Fairtrade, WTFO and Ethical Fashion movements across Europe to join forces to foster more resilient livelihoods for the producers and workers behind many of the products that European citizens consume. This action is built on the central insight, developed from the consortium members' own extensive research and experience, that the continuing and endemic poverty among many producers and workers in developing countries is the direct result of imbalances of power in supply chains.

The project is enabling us to do **in-depth studies** into the huge challenges that are preventing workers and producers in developing countries to escape poverty, **and suggests practical ways forwards for policymakers in government and business.**

We are using this research to **raise awareness amongst European consumers, and to mobilise them to take action.** This year this has included a survey of 5,000 people aged 16-75 in the five largest European markets, including Germany, United Kingdom, France, Italy and Spain, to find out how supply chain transparency and sustainability impacts EU consumers' purchasing decisions.

As members of the world community, the European Union and European Governments have committed themselves to achieving the [UN Sustainable Development Goals by 2030](#). Our research is demonstrating that without action to make supply chains fairer, the world will fall short on the commitments made in 2015. **We outline how the Fair Trade movement is playing an important role in meeting the goals and targets** to tackle poverty, gender equality, decent work and sustainable consumption. **But we cannot do it alone, and we outline steps governments and businesses need to take to tackle systemic challenges in supply chains.**

About this Report

This Synthesis Report summarises the most important findings, analysis and recommendations developed from the consortium-wide research programme. We have structured this report to make it easy for consortium members to access and use the research findings in their national awareness raising, campaigning and advocacy work. The report contains:

- Briefings – summarising each report and suitable for consortium members to use in advocacy meetings with policymakers
- Key Statistics – by report and by SDG, for use in communications with the public
- Links to Word versions of the reports – to enable consortium members to use the content in their own written and online communications
- Recommendations – A full list of all the recommendations to policy makers contained within this year's research reports

About us

The Fair Trade movement is made up of individuals, organizations and networks that share a common vision of a world in which justice, equity and sustainable development are at the heart of trade structures and practices so that everyone, through their work, can maintain a decent and dignified livelihood and develop their full human potential. The 'Trade Fair, Live Fair' consortium is made up of members of Fairtrade Foundation and the World Fair Trade Organization. WTFO and Fairtrade International have recently signed a new International Fair Trade Charter that enshrines the common vision and fundamental values of the Fair Trade movement to put us on the path to realising the Sustainable Development Goals. The Charter can be read here: [fair-trade.website](https://www.fair-trade.website).

We are joined on this project by our friends from the Ethical Fashion movement, Fashion Revolution. Fashion Revolution work to ensure that clothing is made in a safe, clean and fair way. You can find out more about Fashion Revolution here: fashionrevolution.org/about

Challenges in Supply Chains

Poverty

SDG 1 commits the world to ending poverty in all its forms, everywhere. Yet millions of producers and workers who produce many of the everyday products we take for granted live in abject poverty.

Take coffee, where in 2017, Peruvian and Ethiopian farmers had an average income that was 20% lower than it was 12 years ago, keeping them below the poverty line. Or tea, where in the tea-growing state of Assam in north east India, 1 in 3 people live below the Indian poverty line – significantly worse than the Indian national average of 1 in 5. Garment and textile workers in India fare little better, with most on the lowest legal minimum wage.

Decent Work

SDG 8 commits to full and productive employment and decent work for all. Without living wages and living incomes, this goal will remain elusive for millions of the world's workers and farmers, who will be unable to escape poverty.

Our research into supply chains exposes the low wages and incomes workers and farmers currently get for their produce. The 'unskilled' minimum wage that garment and textile workers in India earn amounts to less than €60 a month. One reason for this is the weak position of trade unions in the sector, with trade union membership estimated to be as low as 4% amongst textile workers, and collective bargaining agreements practically non-existent.

Tea workers in Assam are paid an even lower wage, which is supplemented by 'In-kind' benefits. These include services such as housing, sanitation, health facilities and primary schools, but Traidcraft Exchange's report has shown how those benefits can be of a poor standard. It is hard to hold brands and retailers to account for these low wages because there is a lack of transparency about who is sourcing from what tea estate.

Revenues gained from coffee are on the rise, with roasters and retailers earning €1.2 billion more per year from coffee sales over the last 20 years in France. Yet in that same period farmers and traders have earned just €64 million more. Thus over this period the revenue gained by the producing countries has gone down from 24% of the value in the mid-90s to 16% in 2017.

Gender Equality

SDG 5 commits us to achieve gender equality and empower all women and girls. Women often make up the majority of workers and producers in the supply chains we research and

work on. It follows that the majority of workers and producers struggling to get decent work and escape poverty are women.

An estimated 60% of India's textile and clothing workers are women. They are excluded from positions of responsibility in these factories, or are even victims of dismissal in the event of pregnancy. Most workers who pick tea in Assam are women, yet they often have to use their meagre cash wages to pay for services which should be provided by the tea estate. This often involves making hard choices for their families between sending their children to a decent school, eating properly, accessing health services promptly, spending money repairing their homes, or the regular expenditure of buying clothes and shoes.

Fashion Revolution's Transparency Index has uncovered that whilst brands and retailers are transparent about their policies on discrimination, they disclose little about how they are addressing gender equality in their supply chains. Over three-quarters of the brands and retailers publish a policy on discrimination both within the company (76%) and in the supply chain (79%). But only about 40% of the brands and retailers publish a policy on equal pay both for their own employees and in their supply chain. And only 5% of the brands disclose any data on the prevalence of gender-based labour violations in their supplier facilities.

Sustainable Consumption and Climate Action

SDG 12 commits the world to sustainable production and consumption patterns, and SDG 13 to tackling climate change.

In coffee, our research has found there is an alarming increase in environmental pollution linked to the use of chemical inputs, and continuing deforestation associated with the expansion of the coffee industry and the modernisation of farming. These developments are taking place in the context of the growing impact of climate change on coffee production, especially Arabica: yields and crop quality are regularly affected, with a rise in production costs that can substantially lower producers' incomes.

There is encouraging commitment to address sustainable consumption by fashion brands and retailers, with 55% of brands publishing measurable, long-term commitments or goals on improving environmental impacts.

Consumers Demand Action

Consumers are clear they want action taken to tackle unfairness in supply chains. Fashion Revolution's survey of 5,000 European consumers shows that the majority of people surveyed think it is important for fashion brands to reduce their long-term impacts on the world by addressing climate change (85%), environmental protection (88%), global poverty (84%), and gender inequality (77%). And the majority of consumers (68%) agreed that the government has a role to play in ensuring that clothing is sustainably produced.

Recommendations – Towards Transparency In Supply Chains

The research reports suggest practical steps that policymakers in government and business can take to tackle systemic challenges in supply chains, and ensure they can make progress to achieving the SDGs. Each supply chain is different and complex, yet across this year's studies some common recommendations for action emerge.

The reports call on **governments** to better implement and enforce existing laws that are meant to protect workers and the environment everywhere.

They call on **companies** to pay prices to guarantee decent incomes and wages

And they call on both to **increase transparency in supply chains**.

Transparency is a major theme of this year's research. Transparent disclosure makes it easier for brands, suppliers and workers, trade unions, NGOs and citizens to alert brands and retailers when human rights and environmental abuses occur in the places where their products are made. It means that workers, unions, and NGOs can call upon brands to ensure that abuses stop and workers get remedies. It is essentially about greater corporate accountability.

As such, the research reports call on **governments to look at legislating to support transparency**, such as introducing mandatory due diligence and standardised disclosure by brands on social and environmental issues (including the origin, and distribution of value).

And they also call on companies to be more transparent about their supply chains, including disclosing:

- supplier lists in a searchable format and publish more easy-to-understand information about their social and environmental performance, progress and impacts across the entire supply chain.
- which factories, estates and plantations they buy from.
- where the value goes in a supply chain – especially the percentage of value that goes to producers and workers.
- where possible the daily minimum wage paid and the company's assessment of what a living wage should be. This would show whether workers are being paid a living wage and, if not, what the wage gap is.

A full list of the recommendations from all the reports can be found at the end of this Executive Summary.

How WTFO Members are contributing to the SDGs

'Trade Fair, Live Fair' members are committed to doing our bit to contribute to the achievement of the SDGs. 400 organisations, including 330 Fair Trade Enterprises, across 70 countries, are members of the World Fair Trade Organization (WTFO).

Members of WTFO comply with the [10 Principles of Fair Trade](#). There is a strong correlation between those principles and the goals and targets of the SDGs. The below table gives a summary of those links – and our [briefing on the report by Spain's Coordinadora Estatal de Comercio Justo](#) shows the links in greater detail.

SDG	WTFO Fair Trade Principles that contribute
Goal 1 – No Poverty	1. Opportunities for Disadvantaged Producers 4. Fair Payment
Goal 2 – Zero Hunger	1. Opportunities for Disadvantaged Producers 3. Fair Trading Practices 8. Capacity Development
Goal 4 – Quality Education	4. Fair Payment

	5. Ensuring No Child Labour and Forced Labour 8. Capacity Development
Goal 5 – Gender Equality	6. Commitment to Non Discrimination, Gender Equity And Women’s Economic Empowerment, and Freedom of Association 2. Transparency and Accountability
Goal 8 – Decent Work and Economic Growth	3. Fair Trading Practices 5. Ensuring No Child Labour and Forced Labour 6. Commitment to Non Discrimination, Gender Equity And Women’s Economic Empowerment, and Freedom of Association 7. Good Working Conditions
Goal 10 – Reduce inequality within and among countries	3. Fair Trading Practices
Goal 12 – Responsible Consumption and Production	9. Promotion of Fair Trade 10. Respect for the Environment
Goal 13 – Climate Action	10. Respect for the Environment
Goal 15 – Life on Land	10. Respect for the Environment
Goal 16 – Peace, Justice and Strong Institutions	2. Transparency and Accountability 5. Ensuring No Child Labour and Forced Labour
Goal 17 – Partnerships for the Goals	9. Promotion of Fair Trade

How Fair Trade is contributing to the SDGs

In addition to the above, the reports also demonstrate some examples of the impact Fair Trade is having in contributing to the SDGs. This includes:

Fairtrade Coffee in France

Fairtrade standards and principles provide the following benefits and help contribute towards the achievement of Goals 1, 2, 8, 10, 12, and 13:

- A minimum price guarantee is implemented to act as a "security net" for producers.
- The Fairtrade premium – the use of which is decided jointly by the producer and worker organisations. It acts as a specific premium to help producers move towards organic farming.
- By organising themselves as a group and in a democratic way, producers and workers can get more of a say when it comes to management and trade.
- Respecting the conventions of the International Labour Organisation and the reduction of environmental impact by adopting good farming practices.
- Double label Fairtrade/organic which delivers the best results, reducing societal costs by 45% in Ethiopia, 58% in Colombia and 66% in Peru.

- Fairtrade coffee sales in France are benefiting farmers in Peru, Mexico, Guatemala, Colombia, Ethiopia and Indonesia.

Across all of their information and awareness campaigns, fair trade movements encourage consumers to think about where the products they are buying come from, and the social and environmental conditions in which they are manufactured.

In 2018, Fairtrade certified coffee sold the most volumes in France in comparison with other certified coffee labels. In 2017, coffee was the best-selling fair trade product in France, with 51% of sales in value, representing a turnover of around €300 million.

Fair Trade Textiles from India

Oxfam-Magasins du monde's comparative analysis of 4 Indian fair trade organisations has shown that fair trade leads to significant improvement relative to the conventional textile sector:

- Core ILO Conventions are respected in the fair trade sector and no violation is found of the working conditions analysis in the study.
- One organisation profiled in the study shows it is possible to make a larger industrial textile player more sustainable within a few years.
- At the large FTO studied in this research, the increase in the rate of trade union membership (membership stood at 90%) and the number of consultations with management in recent years has enabled workers to obtain a certain number of advantages, more specifically at a monetary level. These advances contrast strongly with the low level of trade union freedom prevalent in the Indian textile sector.

The year ahead

2019 will see new research published and greater advocacy towards European governments and the European Union, and brands and retailers.

In the UK, the **Fairtrade Foundation** will be publishing a report demonstrating how progress towards **living incomes can be achieved in cocoa** (SDG 1, 2, and 12). Based on that report, FTF will be launching a Living Income campaign, focused on women's economic empowerment, for [Fairtrade Fortnight 2019](#) at the end of February. The campaign will mobilise the British public to call on the UK Government to support global efforts to boost living incomes, spend more aid helping small farmers, and change its business and human rights policies to support living incomes.

For International Women's Day 2019, **WFTO Global** will publish their study on **gender equity** and its relationship with the distribution of power and value in supply chains (SDG 5 and 12). It will contain desk-based and field research on gender equity and women's rights, involving collecting existing studies, publications, and best practice, and a survey on the status of gender equity in the workplace in key supply chains, exploring links to EU consumption practices.

Fashion Revolution's next big research endeavour is the **Fashion Transparency Index 2019** which will review and rank 200 major fashion brands and retailers.

WFTO Europe will release a research paper on the **Fair Payment system** put in place by the World Fair Trade Organization, highlighting it as an example of best practice for the implementation of the SDGs (SDG 8).

And **Traidcraft Exchange** will release a report on **serious human rights abuses in agricultural supply chains** (SDG 12, 8 and 1). It will explore in-depth the supply chain dynamics and commercial drivers that contribute to these harmful practices and will make recommendations for improved corporate practice and policy change, including exploring the need for improved due diligence and corporate liability.

WFTO and **Traidcraft Exchange** will also research the innovative governance systems and business models that exist within the fair trade movement. They will assess how these contribute to the achievements of the SDGs and how best practices can be supported by investors, buyers and policy makers.

Rising inequality, entrenched poverty and a deepening ecological crisis underline the need for robust action from governments, businesses and citizens to achieve the Sustainable Development Goals.

Over the coming year the Fairtrade, WFTO and Ethical Fashion movements engaged in the 'Trade Fair, Live Fair' project will continue to better understand the systematic challenges preventing workers and producers in developing countries to escape poverty, put forward practical policy suggestions for how policymakers in government and business can address them, and mobilise European citizens to pressurise decision makers to act.

Recommendations

Recommendations from all six reports from year 1 are listed below.

Estatat de Comercio Justo: Fair Trade and Sustainable Development Goals

Recommendations to Government Policymakers

10 measures that the Coordinadora Estatal de Comercio Justo (Fair Trade State Coordinator, Spain) requests political parties to include in their electoral programs:

1. Defend human, labour and environmental rights.
2. Promote fair trade in foreign policy.
3. Foster agreements with countries that promote Fair Trade and the Solidarity Economy.
4. Advocate for Fair Trade as a line of cooperation policy.
5. Promote the ethical public purchase in the State Administrations through the Ethical Public Purchase Law.
6. Modify the Social Economy law to promote fair trade.
7. Promote positive taxation in fair trade products.
8. Promote the consumption of fair trade products in public administrations.
9. Awareness about fair trade. Support the dissemination of its principles and values.
10. Educate children and youth as critical and responsible citizens.

Fashion Revolution: Transparency Index 2018

Recommendations to Government Policymakers

- Better implement and enforce existing laws that are meant to protect workers and the environment everywhere.
- Legislate and support transparency — i.e. mandatory due diligence and standardised disclosure by brands on social and environmental issues.
- Make companies and their executives at home accountable for what happens in the company's supply chains, regardless of whether the company has direct control or where in the world abuses may be happening.

Fashion Revolution: Consumer Survey 2018

Key Points for Government Policy Makers

- The majority of consumers (68%) agreed that the government has a role to play in ensuring that clothing (including shoes and accessories) is sustainably produced.
- The majority of consumers also agreed that fashion brands should be required by law to:
 - respect the human rights of everybody involved in making their products (77%)
 - protect the environment at every stage of making their products (75%)
 - provide information about the social impacts of their business (68%)
 - provide information about the environmental impacts of their business (72%)
 - say if they are paying the workers who make their products a fair, living wage (72%)

Commerce Équitable France: Coffee - The Success Story That Hides A Crisis

To European Governments

Create an enabling framework to incentivise alternatives whose impact has been proven

- Create an obligation of transparency for the consumer (such as the origin, distribution of value, etc)

- Implement the duty of care (especially on the payment of decent income and wages)
- Create a polluter tax on coffee pod packs, depending on their composition and impacts
- Change the VAT rate of coffee products according to socio-environmental impacts

Better regulate and understand better the development and environmental impacts

- Establish a permanent monitoring body/observatory on the sustainability of coffee value chains that begins by publishing annual estimates of prices and margins in the sector
- Fund new field studies on decent income / wages in coffee areas and integrate results into the monitoring body/observatory
- Finance studies on deforestation in coffee areas and integrate the results in the observatory
- Create new tools for regulating international price volatility

To Companies

Engage and guarantee transparency on all their sectors

- Pay prices to guarantee decent incomes and wages (agreements / multi-party contracts on coffee supply)
- Develop pre-financing adapted to the needs of producers and their organizations according to their degree of autonomy and vertical integration
- Ensure transparency on the percentage of value that goes to producers.
- Ensuring transparency on origin for mass / standardized coffees

To Producer Country Governments

Support the collective structuring of producers and the development of diversified agroforestry models

- Develop access to finance for producers and their organizations
- Support producer and worker organizations, their development and their internal democracy
- Document and disseminate knowledge about alternative models of organic coffee / agroforestry
- Develop specific programmes for information and training on the inequalities suffered by women in the coffee industry, and bring about the necessary reforms to resolve them (land, for example)

Oxfam-Magasins du monde: Fair Trade Textiles and Decent Work

Recommendations to European Union (EU) policy-makers

- Utilise the power of public procurement for the benefit of fair trade cotton/textiles.
- Increase support for fair trade cotton and/or textiles in commercial and development policies, e.g. in the "Trade for All" strategy, the sustainable development chapters of the EU's new generation of free trade agreements (FTAs) and in Aid for Trade policies more generally.
- Give priority in the EU's Garment Initiative to fair trade cotton/textile products.
- Further explore opportunities for preferential market access (or "qualified" access) for fair trade (textile) products (and for more broadly sustainable textile products).
- Establish a binding legislative framework requiring due diligence from companies importing textile products on their soil
- Encourage the establishment of national strategies to increase sustainability in the textile industry, strategies which could include:
 - creating a forum for dialogue and exchange between companies regarding good practices;

- developing tax incentives, for example reductions in VAT on fair trade textile products;
- funding research (e.g. the development of techniques for tracing textile products, for mapping supply chains);
- supporting (financial and/or other) campaigns, conferences, information or training programmes aimed at fashion companies regarding fair trade and sustainable textiles;
- promoting existing guarantee systems, such as Fairtrade International's cotton sourcing programme and new Textile Standard, or the WFTO's new product label;
- funding public awareness campaigns about the true production and consumption costs of textile products.

Traidcraft Exchange: The Estate They're In

Poverty pay and appalling living conditions will not be eradicated on tea estates in Assam overnight. The solution is complex and multi-layered and improvements will require a range of actors to work together. But complexity should not be an excuse for inaction: business-as-usual will not lead to higher wages and better living conditions for women in Assam.

For the UK tea brands

- Start by being transparent about which tea estates and tea factories you buy from
- Publishing your list of suppliers would help open up the secretive world of tea-buying. It would shine a light on exploitation and mean that consumers – and more importantly workers in Assam – could hold tea estates to account.
- The names and addresses of tea factories and estates that you purchase from should be published in a single place, easily accessible on your website and updated at least once per year.
- Where possible additional information should be included too: the daily minimum wage on the tea estate and your assessment of what a living wage should be. This would show whether workers are being paid a living wage and, if not, what the wage gap is.

For tea estates in Assam

- Open yourselves up to scrutiny
- If you are to thrive in the future you will need to change the way you do business.
- Tea estates should not be closed spaces cut off from the normal rules of accountability. Civil society groups, journalists and auditors should have free and unimpeded access to the estates and their workforce.

For UK consumers

- Don't stop buying or drinking tea from Assam but do ask questions
- A boycott of tea from Assam at this point will not help the women who pick it. On the contrary it would be likely to push workers further into poverty as estates struggle to find buyers for their tea.
- Do ask the big brands to use their power to improve the lives of women working in Assam. As a first step ask them to publish the names and addresses of the tea estates they buy from.

Briefings

Briefing - Estatal de Comercio Justo: Fair Trade and Sustainable Development Goals

[Coordinadora Estatal de Comercio Justo](#) (Fair Trade State Coordinator, Spain) conducting research to explore the relationship between the WFTO's Fair Trade principles and SDGs and describes how the WFTO movement contributes to the achievement of Agenda 2030. The research explains how decent labour conditions, fair price and environmental respect, among other things, are core values not only of WFTO but also of the Sustainable Development Goals that we should reach in 2030. This demonstrates that running an organisation in accordance with WFTO's 10 Fair Trade Principles is contributing to the SDGs.

Recommendations to Government Policymakers

10 measures that the Coordinadora Estatal de Comercio Justo (Fair Trade State Coordinator, Spain) requests political parties to include in their electoral programs:

11. Defend human, labour and environmental rights.
12. Promote fair trade in foreign policy.
13. Foster agreements with countries that promote Fair Trade and the Solidarity Economy.
14. Advocate for Fair Trade as a line of cooperation policy.
15. Promote the ethical public purchase in the State Administrations through the Ethical Public Purchase Law.
16. Modify the Social Economy law to promote fair trade.
17. Promote positive taxation in fair trade products.
18. Promote the consumption of fair trade products in public administrations.
19. Awareness about fair trade. Support the dissemination of its principles and values.
20. Educate children and youth as critical and responsible citizens.

Talking Points

Fair Trade Organisations that are part of the World Fair Trade Organization (WFTO) must comply with the 10 Principles of Fair Trade. The following table demonstrates the ways in which Fair Trade Organisations are, through the 10 principles, meeting a wide range of Sustainable Development Goals and targets.

10 Principles of Fair Trade		Contribution to SDG Goals & Targets
1. Opportunities for Disadvantaged Producers		
<ul style="list-style-type: none"> Poverty reduction through trade forms a key part of Fair Trade organisation's aims. They seek to enable producers to move from income insecurity and poverty to economic self-sufficiency and ownership Fair Trade guarantees people have equal rights to economic resources, as well as access to basic services, financial services and microfinance. 	→	<p>Goal 1 – No Poverty</p> <p>1.4 - By 2030, ensure that all men and women, in particular the poor and the vulnerable, have equal rights to economic resources, as well as access to basic services, ownership and control over land and other forms of property, inheritance, natural resources, appropriate new technology and financial services, including microfinance.</p> <p>1.5 - By 2030, build the resilience of the poor and those in vulnerable situations and reduce their exposure and vulnerability to climate-</p>

		related extreme events and other economic, social and environmental shocks and disasters.
<ul style="list-style-type: none"> A large number of the 2,000 Fair Trade small producer organisations around the world are dedicated to agriculture. 	→	<p>Goal 2 – Zero Hunger</p> <p>2.3 - By 2030, double the agricultural productivity and incomes of small-scale food producers, in particular women, indigenous peoples, family farmers, pastoralists and fishers, including through secure and equal access to land, other productive resources and inputs, knowledge, financial services, markets and opportunities for value addition and non-farm employment.</p>
2. Transparency and Accountability		
<ul style="list-style-type: none"> Organizations must be transparent in their management and in their commercial relations. They must favour the participation of its members and workers in decision making. 	→	<p>Goal 16 – Peace, Justice and Strong Institutions</p> <p>16.5 - Substantially reduce corruption and bribery in all their forms.</p> <p>16.6 - Develop effective, accountable and transparent institutions at all levels.</p>
<ul style="list-style-type: none"> Promoting the participation of women in decision making is a key aspect of this principle. 	→	<p>Goal 5 – Gender Equality</p> <p>5.5 - Ensure women's full and effective participation and equal opportunities for leadership at all levels of decision making in political, economic and public life.</p>
3. Fair Trading Practices		
<ul style="list-style-type: none"> In all negotiations, the well-being of producers is sought and profits are not maximized at their expense. In addition, the established commitments are fulfilled, an advance payment is made to the production organization and the work done is rewarded in case of cancellation of the order due to external causes. 	→	<p>Goal 10 – Reduce inequality within and among countries</p> <p>10.2 - By 2030, empower and promote the social, economic and political inclusion of all, irrespective of age, sex, disability, race, ethnicity, origin, religion or economic or other status.</p> <p>10.A - Implement the principle of special and differential treatment for developing countries, in particular least developed countries, in accordance with World Trade Organization agreements.</p> <p>Goal 2 – Zero Hunger</p> <p>2.C - Adopt measures to ensure the proper functioning of food commodity markets and their derivatives and facilitate timely access to market information, including on food reserves, in order to help limit extreme food price volatility.</p> <p>Goal 8 – Decent Work and Economic Growth</p> <p>8.8. - Protect labour rights and promote safe and secure working environments for all workers, including migrant workers, in particular women migrants, and those in precarious employment</p>
4. Fair Payment		

<ul style="list-style-type: none"> The payment of a fair price gives the producers an income with which to cover production costs, including decent wages for workers. 	→	<p>Goal 1 – No Poverty</p> <p>1.4 - By 2030, ensure that all men and women, in particular the poor and the vulnerable, have equal rights to economic resources, as well as access to basic services, ownership and control over land and other forms of property, inheritance, natural resources, appropriate new technology and financial services, including microfinance.</p> <p>Goal 8 – Decent Work and Economic Growth</p> <p>8.5 - By 2030, achieve full and productive employment and decent work for all women and men, including for young people and persons with disabilities, and equal pay for work of equal value.</p>
<ul style="list-style-type: none"> In order to build negotiation and management skills, Fair Trade organizations facilitate leadership training to empower producers. 	→	<p>Goal 4 – Quality Education</p> <p>4.3 - By 2030, ensure equal access for all women and men to affordable and quality technical, vocational and tertiary education, including university.</p> <p>4.4 - By 2030, substantially increase the number of youth and adults who have relevant skills, including technical and vocational skills, for employment, decent jobs and entrepreneurship.</p>
5. Ensuring No Child Labour and Forced Labour		
<ul style="list-style-type: none"> Fair Trade organizations adhere to the Convention on the Rights of the Child and its national / local legislation on child employment. The minimum age of employees must be 17 and these young people must be able to continue their studies. The Fair Trade movement carries out campaigns and positions itself publicly in the complaint of child labor exploitation. 	→	<p>Goal 8 – Decent Work and Economic Growth</p> <p>8.7 - Take immediate and effective measures to eradicate forced labour, end modern slavery and human trafficking and secure the prohibition and elimination of the worst forms of child labour, including recruitment and use of child soldiers, and by 2025 end child labour in all its forms.</p> <p>Goal 16 – Peace, Justice and Strong Institutions</p> <p>16.2 - End abuse, exploitation, trafficking and all forms of violence against and torture of children.</p>
<ul style="list-style-type: none"> Many Fair Trade producer organizations use their premium on educational projects aimed at children; including scholarships, learning aids and supplies, construction and repairs of schools etc. 	→	<p>Goal 4 – Quality Education</p> <p>4.1 - By 2030, ensure that all girls and boys complete free, equitable and quality primary and secondary education leading to relevant and effective learning outcomes.</p> <p>4.2 - By 2030, ensure that all girls and boys have access to quality early childhood development, care and pre-primary education so that they are ready for primary education.</p>
6. Commitment to Non Discrimination, Gender Equity And Women's Economic Empowerment, and Freedom of Association		
	→	

<ul style="list-style-type: none"> Fair Trade establishes as one of its fundamental principles the equality of salary between workers for the same tasks. The presence of women on management and decision-making bodies is encouraged. Many Fair Trade producer organizations deliver awareness-raising projects, in their communities, on gender equality. 		Goal 5 – Gender Equality 5.1 - End all forms of discrimination against all women and girls everywhere. 5.5 - Ensure women's full and effective participation and equal opportunities for leadership at all levels of decision-making in political, economic and public life.
<ul style="list-style-type: none"> Fair Trade organisations comply with ILO conventions guaranteeing the fundamental rights of all workers; and promote workers participation in unions and networks. 	→	Goal 8 – Decent Work and Economic Growth 8.5 - By 2030, achieve full and productive employment and decent work for all women and men, including for young people and persons with disabilities, and equal pay for work of equal value. 8.7 - Take immediate and effective measures to eradicate forced labour, end modern slavery and human trafficking and secure the prohibition and elimination of the worst forms of child labour, including recruitment and use of child soldiers, and by 2025 end child labour in all its forms. 8.8 - Protect labour rights and promote safe and secure working environments for all workers, including migrant workers, in particular women migrants, and those in precarious employment.
7. Good Working Conditions		
<ul style="list-style-type: none"> Fair Trade organizations provide a safe and healthy working environment for workers. Working hours and conditions comply with national legislation and ILO conventions. The Fair Trade movement seeks to raise awareness about the importance of safety and health at work. 	→	Goal 8 – Decent Work and Economic Growth 8.5 - By 2030, achieve full and productive employment and decent work for all women and men, including for young people and persons with disabilities, and equal pay for work of equal value. 8.8 - Protect labour rights and promote safe and secure working environments for all workers, including migrant workers, in particular women migrants, and those in precarious employment.
8. Capacity Development		
<ul style="list-style-type: none"> Fair Trade organizations deliver programmes, including workshops and training plans, to help producers improve their management skills, production capabilities and access to markets. 	→	Goal 4 – Quality Education 4.3 - By 2030, ensure equal access for all women and men to affordable and quality technical, vocational and tertiary education, including university. 4.4 - By 2030, substantially increase the number of youth and adults who have relevant skills, including technical and vocational skills, for employment, decent jobs and entrepreneurship. Goal 2 – Zero Hunger 2.3 - By 2030, double the agricultural productivity and incomes of small-scale food

		producers, in particular women, indigenous peoples, family farmers, pastoralists and fishers, including through secure and equal access to land, other productive resources and inputs, knowledge, financial services, markets and opportunities for value addition and non-farm employment.
9. Promotion of Fair Trade		
<ul style="list-style-type: none"> Organizations communicate the principles of Fair Trade to others; and raise awareness of commercial injustice, inequality, working conditions, responsible consumption and more related topics. These initiatives reach a variety of audiences including consumers, companies, educational institutions, the media, and public authorities. 	→	<p>Goal 12 – Responsible Consumption and Production</p> <p>Goal 17 – Partnerships for the Goals</p> <p>17.10 - Promote a universal, rules-based, open, non-discriminatory and equitable multilateral trading system under the World Trade Organization, including through the conclusion of negotiations under its Doha Development Agenda.</p> <p>17.11 - Significantly increase the exports of developing countries, in particular with a view to doubling the least developed countries' share of global exports by 2020.</p>
10. Respect for the Environment		
<ul style="list-style-type: none"> Organisations which produce Fair Trade products maximise the use of raw materials from sustainably managed sources in their ranges, buying locally when possible. They use production technologies that seek to reduce energy consumption and where possible use renewable energy technologies that minimise greenhouse gas emissions. Other measures include limiting waste, transporting goods by sea where possible – and in the case of agriculture using organic or low pesticide use production methods. 	→	<p>Goal 13 – Climate Action</p> <p>Goal 12 – Responsible Consumption and Production</p> <p>12.2 - By 2030, achieve the sustainable management and efficient use of natural resources.</p> <p>12.A - Support developing countries to strengthen their scientific and technological capacity to move towards more sustainable patterns of consumption and production.</p> <p>Goal 15 – Life on Land</p> <p>15.3 - By 2030, combat desertification, restore degraded land and soil, including land affected by desertification, drought and floods, and strive to achieve a land degradation-neutral world.</p>

Briefing - Fashion Revolution: Transparency Index 2018

[Fashion Revolution](#)'s Transparency Index is a review of 150 of the biggest global fashion brands and retailers ranked according to how much they disclose about their social and environment policies, practices and impact.

SDG Focus: Goal 8, Decent Work; Goal 5, Gender Equality; Goal 16, Peace, Justice and Strong Institutions

Recommendations to Government Policymakers

- Better implement and enforce existing laws that are meant to protect workers and the environment everywhere.
- Legislate and support transparency — i.e. mandatory due diligence and standardised disclosure by brands on social and environmental issues.
- Make companies and their executives at home accountable for what happens in the company's supply chains, regardless of whether the company has direct control or where in the world abuses may be happening.

Talking Points

Ten brands and retailers lead the path towards greater transparency amongst the major corporate players

- Adidas and Reebok top the Index again this year scoring 58% or 144.5 out of 250 possible points followed by Puma, H&M, Esprit, Banana Republic, Gap,
- Old Navy, C&A and Marks & Spencer in the 51-60% range. ASOS is shortly behind at 50%, having increased their level of disclosure by 18% since last year. The mean average score amongst all 150 brands and retailers is 52 (21%) out of 250 possible points.

The brands and retailers we reviewed last year have increased their level of transparency by 5%

- When we compare the 98 brands and retailers that were included in both the 2017 and 2018 Fashion Transparency Index, we have seen these brands and retailers increase their level of transparency by an average of approximately 5% overall and across each section of the methodology
- This suggests that inclusion in the Fashion Transparency Index has influenced brands and retailers to disclose more.

Major luxury brands move towards transparency

- Hugo Boss, Calvin Klein, Tommy Hilfiger, Gucci, Bottega Veneta, YSL and Burberry score in the 31-40% range, with Hugo Boss increasing its score by 11%, Calvin Klein and Tommy Hilfiger increasing their score by 9%, Gucci, Bottega Veneta and YSL increasing their score by 8% and Burberry increasing their score by 7% this year.

Too many big brands and retailers continue to lack transparency

- 12 brands and retailers (8%) have scored 0% in 2018, compared to three (3%) in the 2017 report.
- These brands and retailers' lack of disclosure brings down the overall average score, despite many brands disclosing considerably more information this year compared to 2017.
- Dior, Heilan Home and s.Oliver continue to disclose nothing, and this year we are seeing next to nothing from Barney's New York, Desigual, Jessica Simpson, Longchamp, Liverpool, Max Mara, Mexx, Nine West and Sandro. 48 brands and

retailers (32%) are scoring in the bottom 0-10% range overall, compared to 32 brands and retailers (32%) last year

- This shows that many brands and retailers are still lagging far behind, disclosing very little about their social and environmental practices.

Many more brands and retailers are disclosing their suppliers

- 37% of the brands and retailers are publishing a list of their manufacturers (tier 1), up from 32% of the brands in 2017 and 12.5% in 2016.
- These supplier lists have become a lot more detailed too, including information such as factory street address, types of products they make and the number of workers.
- 18% of the brands and retailers are disclosing their processing facilities (tier 2), up from 14% of the brands in the previous year.
- Only one brand, which is ASOS, discloses where they source raw materials. No brands were disclosing this information last year.

Publicly available supplier lists can help fix problems faster

- Having quick, immediate access to these supplier lists can be crucial to solving problems swiftly.
- Transparent disclosure makes it easier for brands, suppliers and workers, trade unions and NGOs to alert brands and retailers when human rights and environmental abuses occur in the places where their products are made.
- It means that garment workers, unions, and NGOs can call upon brands to ensure that abuses stop and workers get remedies. It is essentially about greater corporate accountability.

More talk about policies and commitments than practices and impacts

- Brands and retailers give a lot more time and space to explain their values and beliefs rather than their practices and impacts.
- On average, the brands and retailers scored 46% in section one, which looks at what information they publish about their policies and commitments.
- 31 (21%) brands and retailers scored more than 80% on policy and commitments and all but 10 brands were publishing at least one policy.
- However, on average the brands just scored 11% when it comes to traceability and 17% when it comes to publishing procedures and outcomes of supplier assessments.

Focus on discrimination but little disclosed about addressing gender equality

- Over three-quarters of the brands and retailers publish a policy on discrimination both within the company (76%) and in the supply chain (79%).
- But only about 40% of the brands and retailers publish a policy on equal pay both for their own employees and in their supply chain.
- Meanwhile, less than half (47%) of brands and retailers disclose the percentage of women in executive and management positions within the company, and only 14% of the brands and retailers publish the annual gender pay gap within the company.
- When it comes to workers in the supply chain, of which an estimated 80% are women, only 13% of the brands publish detailed guidance on issues facing female workers in the supply chain and only 5% of the brands disclose any data on the prevalence of gender-based labour violations in their supplier facilities.

Information shared by major brands and retailers remains difficult to navigate, jargon-heavy and shallow

- The disclosure of meaningful information and data by brands and retailers is often buried in company websites, housed on external micro-sites, in 300+ page annual reports or simply not available at all.

- Brands present information in many different formats, using all sorts of unclear language and industry jargon and presented in an array of different visuals.

Still a long way to go towards transparency for all brands and retailers

- No brand or retailer is scoring above 60% of the total possible points.
- Whilst we are seeing brands and retailers begin to publish more about their social and environmental efforts, there is still much crucial information that remains concealed.

Fashion Revolution believes that laws and regulations are key to transforming the fashion industry.

- There are plenty of international standards set by the United Nations and related bodies such as the International Labour Organisation, and many countries actually have living wages, workers' rights and environmental protections written into their Constitutions.
- However, enforcement of existing laws is often absent, implementation is weak and there is little opportunity to address violations through the courts. This needs to change.
- Transparency is beginning to become subject to legislation. For example, France requires companies to report annually on environmental, social and corporate governance issues. In the UK, companies must now disclose their gender pay gap.
- The UK Modern Slavery Act and California's Transparency in Supply Chains Act require companies to disclose their efforts to eradicate human trafficking and slavery from their supply chains. The U.S. has recently banned the import of goods made by child and forced labour.
- The European Union is currently discussing a number of measures that would legally require companies to carry out risk- assessments across their supply chains.
- We hope the Fashion Transparency Index helps to demonstrate the need for mandatory due diligence and reporting. We would also like to see governments make companies and their executives legally responsible for what happens in the company's supply chains, regardless of whether the company has direct control or where in the world abuses may be happening.
- Citizens deserve to know that the clothes they buy and wear have not contributed to exploitation and environmental degradation.

Briefing - Fashion Revolution: Consumer Survey

[Fashion Revolution](#) commissioned a survey of 5,000 people aged 16-75 in the five largest European markets, including Germany, United Kingdom, France, Italy and Spain, to find out how supply chain transparency and sustainability impacts EU consumers' purchasing decisions when shopping for clothing, accessories and shoes.

SDG Focus: Goal 8, Decent Work; Goal 5, Gender Equality; Goal 16, Peace, Justice and Strong Institutions; Goal 12, Sustainable Consumption

Key Points for Government Policy Makers

- The majority of consumers (68%) agreed that the government has a role to play in ensuring that clothing (including shoes and accessories) is sustainably produced.
- The majority of consumers also agreed that fashion brands should be required by law to:
 - respect the human rights of everybody involved in making their products (77%)
 - protect the environment at every stage of making their products (75%)
 - provide information about the social impacts of their business (68%)
 - provide information about the environmental impacts of their business (72%)
 - say if they are paying the workers who make their products a fair, living wage (72%)

Talking Points

The survey questions were designed to correlate with the following United Nation's Sustainable Development Goals

- SDG 1 – End poverty in all its forms, everywhere.
- SDG 5 – Achieve gender equality and empower all women and girls.
- SDG 8 – Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all.
- SDG 12 – Ensure sustainable production and consumption patterns.
- SDG 13 – Take urgent action to combat climate change and its impacts.

When buying clothes, more than one in three consumers surveyed across the five largest EU markets said that they consider social (38%) and environmental impacts (37%).

More people (39%) said that buying clothes made by workers paid a fair, living wage was important than any other topic surveyed, including: environmental protection (37%), safe working conditions (31%), animal welfare (30%), local production (10%) and use of recycled materials (6%).

The majority of people think it is important for fashion brands to reduce their long-term impacts on the world by addressing global poverty (84%), climate change (85%), environmental protection (88%) and gender inequality (77%).

The majority of consumers want to know more about the clothes they buy:

- 67% of people would like fashion brands to tell them where the materials used in their products come from;
- 59% would like to know how their clothes are manufactured;
- 61% of people are interested in learning about what fashion brands are doing to minimise their impacts on the environment and to protect their workers' human rights;
- 59% of people are interested in learning what fashion brands do to improve the lives of people in the societies where they manufacture their products.

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- provide information about the environmental impacts of their business (72%)
- say if they are paying the workers who make their products a fair, living wage (72%)

72% of people said that fashion brands should do more to improve the lives of women making their clothes, shoes and accessories.

When choosing a fashion brand to buy, consumers said it is important for brands to:

- publish how products are sustainable on the packaging (72%)
- explain what products are made from on the packaging (77%)
- make it clear where they source materials, ingredients and components from and who manufactured the product (77%)
- share detailed information about wages and working conditions for people in its global supply chain (66%)
- provide information about how they apply socially responsible practices (70%)
- provide information about how they apply environmentally responsible practices (74%)

A large majority of consumers think that fashion brands should publish the factories used to manufacture their clothes (80%) and which suppliers they use to source the materials used in their clothing (77%).

N. B. This survey also asked consumers how supply chain transparency and sustainability impacts EU consumers' purchasing decisions when shopping for food – analysis of this will be included in the TFLF Synthesis Report for Year 2

Briefing - Commerce Équitable France: Coffee - The Success Story That Hides A Crisis

At a time when international coffee prices are falling, to such an extent that some Latin-American producers are refusing to sell their crops, [Commerce Équitable France](#), [Max Havelaar France](#), the [Rethinking Global Value Chains Network](#) and [BASIC](#) have published a ground-breaking study about coffee based on a socioeconomic analysis of the sector and three specific case studies (Colombia, Ethiopia and Peru).

SDG Focus: Goal 10, Reduce Inequalities; Goal 8, Decent Work; Goal 13, Climate Action; Goal 12, Sustainable Consumption; Goal 1, No Poverty

Recommendations to Policymakers

To European Governments

Create an enabling framework to incentivise alternatives whose impact has been proven

- Create an obligation of transparency for the consumer (such as the origin, distribution of value, etc)
- Implement the duty of care (especially on the payment of decent income and wages)
- Create a polluter tax on coffee pod packs, depending on their composition and impacts
- Modulate the VAT rate of coffee products according to socio-environmental impacts

Better regulate and understand better the development and environmental impacts

- Establish a permanent monitoring body/observatory on the sustainability of coffee value chains that begins by publishing annual estimates of prices and margins in the sector
- Fund new field studies on decent income / wages in coffee areas and integrate results into the monitoring body/observatory
- Finance studies on deforestation in coffee areas and integrate the results in the observatory
- Create new tools for regulating international price volatility

To Companies

Engage and guarantee transparency on all their sectors

- Pay prices to guarantee decent incomes and wages (agreements / multi-party contracts on coffee supply)
- Develop pre-financing adapted to the needs of producers and their organizations according to their degree of autonomy and vertical integration
- Ensure transparency on the percentage of value that goes to producers.
- Ensuring transparency on origin for mass / standardized coffees

To Producer Country Governments

Support the collective structuring of producers and the development of diversified agroforestry models

- Develop access to finance for producers and their organizations
- Support producer and worker organizations, their development and their internal democracy
- Document and disseminate knowledge about alternative models of organic coffee / agroforestry
- Develop specific programmes for information and training on the inequalities suffered by women in the coffee industry, and bring about the necessary reforms to resolve them (land, for example)

Talking Points

Skyrocketing value creation...

- **In France, coffee sales have doubled in value since 2003** thanks to new marketing strategies linked, in particular, to **the** emergence of premium Arabica coffees in preportioned sizes (pods and capsules), proposed by all main roasters and retailers, and for which France has become the number one consumer per capita.
- **The increased revenues generated by this trend benefit an increasingly concentrated industry:** the three primary coffee players in the French market, Nestle (34%), JDE (30%) and Lavazza (17%) now represent 81% of the market, compared with 70% in 2008. This concentration of dominant players is reinforcing their bargaining power throughout the supply chain.

...however, it does not trickle down to the farmers

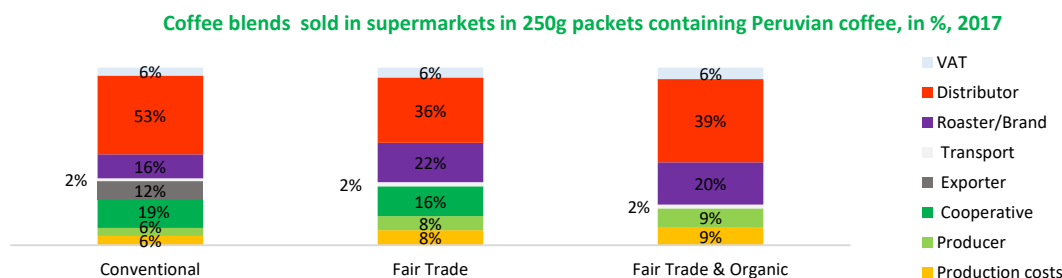
- **At 20 years interval over a same given period (of 4 years) roasters and retailers have reaped an additional 1.177 billion euros from annual coffee sales, while farmers and traders have earned just 64 million euros more.** Thus over this period **the revenue gained by the producing countries has gone down from 24% of the value in the mid-90s to 16% in 2017.**
- Yet the majority of coffee farmers today are suffering a decline in their standard of living and in their working conditions. Faced with regularly falling worldwide coffee prices and increasing production costs linked to labour and inputs, and dependent on their buyers, growers are also suffering from a critical lack of working capital. As a prime example, **in 2017, Peruvian and Ethiopian farmers had an average income that was 20% less than that of the previous 12 years**, keeping them below the poverty line.

Growing societal impacts exacerbated by climate change

- Results: coffee growers and their families report malnutrition, illiteracy, even child labour, and on a broader scale, migration or drug trafficking. Other alarming trends are **an increase in environmental pollution linked to the use of chemical inputs, and continuing deforestation associated with the expansion of the coffee industry and the modernisation of farming.**
- **These developments are taking place in the context of the growing impact of climate change on coffee production, especially Arabica: yields and crop quality are regularly affected, with a rise in production costs that can substantially lower producers' incomes.**
- Taken together, these economic, social and environmental impacts weigh heavily on the economies of producing countries: for example, **in Peru and Ethiopia, each dollar linked to coffee exports in 2017 generated between 85 and 90 cents of hidden costs at the expense of these countries and their populations** (the "societal costs"); Colombia was not as badly affected thanks to a greater added value of coffee for export. **These results illustrate the unsustainability of the value chain in these two countries.**
- An emblematic Fairtrade product, the **coffee sector has many initiatives that claim to take an "alternative" approach deemed to be better for the environment and/or on the social front.**
- Based on our case studies, sustainable agriculture certification such as Rainforest and UTZ - which have now merged - **is characterised by the scarcity of studies and independent information, making it difficult to assess their impact.** Available documentation expresses a vision of economic sustainability for producers **based on increased yields leading to improved profitability and revenues.** This is based on the assumption that market forces can resolve the chain's social and environmental problems once downstream companies adopt relevant criteria, an assumption that is not at all supported by the evidence. On the ground, these initiatives are generally adopted by producers who have above-average means and support.

Fairtrade: a necessary tool...

- The greater number of **studies and publications on Fairtrade show that this system allows for improvements in producers' livelihoods**, especially in terms of income earned from their activities:
- **By imposing the collective organisation of producers as a prerequisite for Fairtrade certification.** This strengthens their bargaining power.
- **By proposing a safety net (a minimum price) as well as a premium**
- By offering an organic premium, which eases the transition to organic production and encourage an agroforestry model that is more resilient to climate change.



Comparison of the value share of 250g packets of ground coffee between conventional value chains and Peru-France Fairtrade ones. Source: Basic.

Furthermore, it is the double label Fairtrade/organic which delivers the best results, as an examination of the hidden costs deferred to the society reveals: for each dollar linked to coffee exports, the societal costs are reduced by 45% in Ethiopia, 58% in Colombia and 66% in Peru. The tools used by Fairtrade are necessary because they affect the key points at the root of the value chain's problems.

...but which alone cannot solve current issues

- Nonetheless, **the effectiveness of Fairtrade varies enormously** according to the amount of coffee sold under Fairtrade terms by cooperatives - often too little in comparison to their total sales - and according to region.
- In particular, more needs to be done:
 - **to rebalance power in the supply chain**, which is currently in favour of the main buyers, which results in cases of unfair trading practices
 - **to the question of the value distribution along the chain**: although Fairtrade allows producers to receive a larger share of the final price of coffee when it is sold in 250g packets, this is greatly diminished in the case of capsules, where 85% to 90% of the final price goes to the coffee roasters and retailers.

A need for a regulatory framework

- **The issue of value distribution is absolutely key**: in an increasingly concentrated sector, the main actors are successfully privatising an increasing share of the value generated by the value chain, whereas the producers, more than ever, need the financial resources to fight against the effects of climate change.
- On a global level, it now seems essential **to think collectively, to link up and coordinate Fairtrade and organic certifications, agroforestry and public regulations (SDG 8, 10, 12, 13 + 5 and 17).**

Briefing - Oxfam-Magasins du monde: Fair Trade Textiles and Decent Work

SDG Focus: Goal 8, Decent Work; Goal 5, Gender Equality

Recommendations to European Union (EU) policy-makers

- Utilise the power of public procurement for the benefit of fair trade cotton/textiles.
- Increase support for fair trade cotton and/or textiles in commercial and development policies, e.g. in the "Trade for All" strategy, the sustainable development chapters of the EU's new generation of free trade agreements (FTAs) and in Aid for Trade policies more generally.
- Give priority in the EU's Garment Initiative to fair trade cotton/textile products.
- Further explore opportunities for preferential market access (or "qualified" access) for fair trade (textile) products (and for more broadly sustainable textile products).
- Establish a binding legislative framework requiring due diligence from companies importing textile products on their soil
- Encourage the establishment of national strategies to increase sustainability in the textile industry, strategies which could include:
 - creating a forum for dialogue and exchange between companies regarding good practices;
 - developing tax incentives, for example reductions in VAT on fair trade textile products;
 - funding research (e.g. the development of techniques for tracing textile products, for mapping supply chains);
 - supporting (financial and/or other) campaigns, conferences, information or training programmes aimed at fashion companies regarding fair trade and sustainable textiles;
 - promoting existing guarantee systems, such as Fairtrade International's cotton sourcing programme and new Textile Standard, or the WFTO's new product label;
 - funding public awareness campaigns about the true production and consumption costs of textile products.

Talking Points

Challenges Facing Textile Workers in India

- India is the 3rd largest world exporter of textile products and clothing, which makes this sector one of the pillars of the Indian economy. It represents a total turnover of \$33 billion, 4% of the gross domestic product (GDP) and 12% of the total value of exports.
- The textile/clothing sector represented nearly 35 million workers in 2013, 8 million of these solely in the area of clothing. Overall, 60% of these workers are women.
- These official figures do not take into account that informal working is very high in India. many employers in the sector offer their employees neither a contract nor access to legal protection, while a growing number of workers work from home, either as self-employed subcontractors, or on an employed basis. Both categories are particularly exposed to the irregularity or cancellation of orders, the absence of reliable supplies of raw materials, late payments and rejected merchandise.
- While most observers consider forced labour to be relatively rare in the clothing sector, it is reportedly more widespread within the intermediary stages, weaving in particular.
- The Fair Wear Foundation (FWF) recently noted an almost total absence of complaint committees in Indian textiles factories, which are however required by the 2013 sexual harassment law, as well as a low level of awareness among workers. In addition, women

are very often excluded from positions of responsibility in these factories, or are even victims of dismissal in the event of pregnancy.

- Workers belonging to a trade union (or seeking to join one) are for their part often persecuted or even dismissed on false pretexts. One of the most visible consequences of the relative weakness of trade unions in India is the low level of wages.
- Minimum wage levels do exist, but wage levels vary according to the skill level of workers. In reality, most of them are confined to the “unskilled” category because no system actually exists for evaluating and certifying skill levels. Furthermore minimum wage legislation does not cover a significant proportion of informal workers and even when minimum wages exists, they are not always adhered to.
- Many textile workers effectively have no choice other than to work many hours of overtime to supplement their low incomes, which means less free time and often even family separation.
- The most frequent violations of health and safety noted by inspection services in the textile industry are reportedly overcrowding, a lack of crèche facilities (for factories with more than 30 employees), a canteen (250 employees), or even adequate toilets.

The Benefits of Fair Trade Textile Organisations in India

- [Oxfam-Magasins du monde](#)'s comparative analysis of 4 Indian fair trade organisations has shown that **fair trade leads to significant improvement** relative to the conventional sector.
- Overall, the core ILO Conventions are respected in the fair trade sector and no violation is found of the working conditions listed in the context analysis of the study.
- One organisation profiled in the study shows it is **possible to make a larger industrial textile player more sustainable within a few years**. Indeed, at the beginning of the 2000s, the FTO was still only a conventional textile producer. Its orders of organic or fair trade products represented only a few percent of its turnover at this time, compared to a turnover entirely from organic products today. In this respect, the work of various NGOs at the beginning of the 2000s has borne fruit and would benefit from being replicated (although it is evident that with the current state of demand, all companies cannot occupy this niche in the market). From this point of view, it must be hoped that the recent introduction of a new system of textile certification by Fairtrade International will contribute to the development of the sector.
- Another conclusion is that the establishment of **a good level of social dialogue is a key element in improving the labour law of an FTO**. The fair trade sector is no different from the conventional sector in this respect, a democratic approach to work being the best guarantee of adherence to the social criteria of fair trade. At the large FTO studied in this research, the increase in the rate of trade union membership (membership stood at 90%) and the number of consultations with management in recent years has enabled workers to obtain a certain number of advantages, more specifically at a monetary level. These advances contrast strongly with the low level of trade union freedom prevalent in the Indian textile sector, and in manufacturing industries more generally. Again, the Fairtrade International label, which places a strong emphasis on this component, could lead to the proliferation of developments of this type.
- A smaller **artisanal FTO covered in the study suffers from numerous structural disadvantages at the economic level**, among other things because of the low-skilled and disadvantaged nature of the craftspeople that it employs. It is logical that these FTOs

therefore face many challenges, for instance at the level of wages and coverage of the supply chain. Beyond an active participation in the projects and systems of the WFTO (living wage and internal monitoring systems), improvements in these areas necessitate significant resources and economies of scale which are made difficult by their size.

- **Increasing their margins and sales volumes is therefore crucial for these FTOs.** Given the competition, the best option could be to diversify their base of small specialised (fair trade, organic, sustainable) buyers, taking advantage of product innovation and “social marketing”. From this point of view, an increased involvement in campaign work and advocacy (for example through the WFTO and Fair Trade Forum India networks) could lead to them better communicating their social impact and better promoting their specificities (informal and marginalised nature of their target audiences, social protection, artisan empowerment, etc.).

Briefing - Traidcraft Exchange: The Estate They're In

[Traidcraft Exchange](#)'s research focused on the tea supply chain, and the roles and responsibilities of different actors in addressing the poor pay and living conditions on tea estates in Assam, in North East India.

SDG Focus: Goal 8, Decent Work; Goal 1, No Poverty

Recommendations for Policymakers

Poverty pay and appalling living conditions will not be eradicated on tea estates in Assam overnight. The solution is complex and multi-layered and improvements will require a range of actors to work together. But complexity should not be an excuse for inaction: business-as-usual will not lead to higher wages and better living conditions for women in Assam.

For the UK tea brands

- Start by being transparent about which tea estates and tea factories you buy from
- Publishing your list of suppliers would help open up the secretive world of tea-buying. It would shine a light on exploitation and mean that consumers – and more importantly workers in Assam – could hold tea estates to account.
- The names and addresses of tea factories and estates that you purchase from should be published in a single place, easily accessible on your website and updated at least once per year.
- Where possible additional information should be included too: the daily minimum wage on the tea estate and your assessment of what a living wage should be. This would show whether workers are being paid a living wage and, if not, what the wage gap is.

For tea estates in Assam

- Open yourselves up to scrutiny
- If you are to thrive in the future you will need to change the way you do business.
- Tea estates should not be closed spaces cut off from the normal rules of accountability. Civil society groups, journalists and auditors should have free and unimpeded access to the estates and their workforce.

For UK consumers

- Don't stop buying or drinking tea from Assam but do ask questions
- A boycott of tea from Assam at this point will not help the women who pick it. On the contrary it would be likely to push workers further into poverty as estates struggle to find buyers for their tea.
- Do ask the big brands to use their power to improve the lives of women working in Assam. As a first step ask them to publish the names and addresses of the tea estates they buy from.

Talking Points

- The women who pick tea on estates in the Indian state of Assam are trapped in poverty with no easy way out.
- Tea grown and harvested in Assam is a key ingredient in many blends sold by UK tea companies, prized for its unique malty flavour.
- Wages are pitifully low, living conditions have deteriorated and progress has stagnated.
- The owners of tea estates have a legal duty to provide 'in kind' benefits to their workforce including housing, schools and health facilities under Indian law, as well as a cash wage
- But evidence gathered by researchers working for Traidcraft Exchange found that on estates that are believed to supply UK tea companies:

- A culture of surveillance and control by management goes unchecked
- Wages – agreed across the Assam tea sector – are below Assam and Indian minimum wage levels
- Housing is often leaky and in a state of disrepair
- Sanitation is minimal or non-existent with open defecation the norm when working
- Local health facilities often lack medicines and staff and better ones are far away
- Food rations are insufficient and of poor quality
- Tea remains one of the most popular drinks in the UK with 165 million cups drunk every day.
- The ‘Big 6’ UK brands – PG Tips, Twinings, Tetley, Yorkshire, Typhoo, and Clipper – together comprise about 70% of the UK tea market with annual sales of around £500 million and all use tea grown in Assam as part of some of their blends.
- They know about the conditions for women working on tea estates in Assam but aren’t doing enough to change them.
- As a first step the big UK brands should be transparent about which estates they buy from. Publishing their list of suppliers would help open up the secretive world of tea-buying. It would shine a light on exploitation and mean that consumers – and more importantly women workers in Assam – could hold tea estates to account.

Campaign successes so far

- The report received widespread media coverage upon publication. Global media coverage of the report launch was 92 million OTVs– with articles in the UK, India, Myanmar, Nigeria and Austria. Major UK publications included the Grocer, Daily Mail, Thompson Reuters and the World Tonight on Radio 4
- Following the start of Traidcraft Exchange’s campaign, 10,000 campaigners have contacted the UK’s six biggest tea brands asking them to publish which tea estates they buy from in Assam, as part of the ‘Who picked my tea?’ campaign.
- As of December 2018 four of the brands have done what Traidcraft Exchange has asked and published their Assam supplier list on their websites. This represents 45% of the UK tea market (by share of retail value).
- Traidcraft Exchange’s next steps will be to:
 - engage in further dialogue with the remaining two companies
 - produce a consolidated list of estates supplying the UK market that will be shared with workers and civil society partners in Assam to strengthen their hand in negotiating fairer wages and better conditions.

Key Statistics

Please note: The primary references to the statistics contained in this Synthesis Report can be found in each research report.

By Report

Fashion Revolution: Transparency Index 2018

- 39% of brands publish an Equal Pay policy that applies to direct employees
- 41% of brands publish an Equal Pay policy that applies to supply chain workers
- 79% of brands publish a policy on Forced or Bonded Labour in the supply chain
- 53% of brands disclose how their Forced or Bonded Labour policy is put into practice
- 77% of brands publish a Child Labour policy
- 39% of brands disclose how their Child Labour policy is put into practice
- 37% of brands publish measurable, long-term commitments or goals on improving human rights
- 55% of brands publish measurable, long-term commitments or goals on improving environmental impacts

(Of 150 brands reviewed by Index)

Fashion Revolution: Consumer Survey 2018

- When buying clothes, more than one in three consumers surveyed across the five largest EU markets said that they consider social (38%) and environmental impacts (37%).
- More people (39%) said that buying clothes made by workers paid a fair, living wage was important than any other topic surveyed, including: environmental protection (37%), safe working conditions (31%), animal welfare (30%), local production (10%) and use of recycled materials (6%).
- The majority of people think it is important for fashion brands to reduce their long-term impacts on the world by addressing global poverty (84%), climate change (85%), environmental protection (88%) and gender inequality (77%).
- The majority of consumers want to know more about the clothes they buy:
 - 67% of people would like fashion brands to tell them where the materials used in their products come from;
 - 59% would like to know how their clothes are manufactured;
 - 61% of people are interested in learning about what fashion brands are doing to minimise their impacts on the environment and to protect their workers' human rights;
 - 59% of people are interested in learning what fashion brands do to improve the lives of people in the societies where they manufacture their products.
- The majority of consumers (68%) agreed that the government has a role to play in ensuring that clothing (including shoes and accessories) is sustainably produced.
- The majority of consumers also agreed that fashion brands should be required by law to:
 - respect the human rights of everybody involved in making their products (77%)
 - protect the environment at every stage of making their products (75%)
 - provide information about the social impacts of their business (68%)
 - provide information about the environmental impacts of their business (72%)
 - say if they are paying the workers who make their products a fair, living wage (72%)
- 72% of people said that fashion brands should do more to improve the lives of women making their clothes, shoes and accessories.
- When choosing a fashion brand to buy, consumers said it is important for brands to:
 - publish how products are sustainable on the packaging (72%)
 - explain what products are made from on the packaging (77%)

- make it clear where they source materials, ingredients and components from and who manufactured the product (77%)
 - share detailed information about wages and working conditions for people in its global supply chain (66%)
 - provide information about how they apply socially responsible practices (70%)
 - provide information about how they apply environmentally responsible practices (74%)
- A large majority of consumers think that fashion brands should publish the factories used to manufacture their clothes (80%) and which suppliers they use to source the materials used in their clothing (77%).

Commerce Équitable France: Coffee - The Success Story That Hides A Crisis

- In France, coffee consumption at home has increased 54% in 15 years.
- France is 1st in the world market for coffee capsule & pods in per capita consumption.
- Capsule & pods made up 58% of coffee consumed at home in 2017
- There is a high level of market concentration of the coffee sector. In France 3 roasters are controlling 81% of the coffee market and 5 biggest coffee traders account for almost 40% of coffee exports & imports.
- An individual coffee capsule costs on average 50/60 euros per kg, compared to only 3 euros for a pack of Arabica of ground coffee of 250 grams. Consumers are buying their coffee at a very higher price, yet it doesn't at all trickle down to the producers.
- Over the last 20 years roasters and retailers have reaped an additional 1.177 billion euros from annual coffee sales, while farmers and traders have earned just 64 million euros more per year.
- Over the last 20 years the revenue gained by the coffee producing countries has gone down from 24% of the value in the mid-90s to 16% in 2017.
- In 2017, Peruvian and Ethiopian farmers had an average income that was 20% less than that of the previous 12 years, keeping them below the poverty line.
- In Peru and Ethiopia, each dollar linked to coffee exports in 2017 generated between 85 and 90 cents of hidden costs at the expense of these countries and their populations (the "societal costs").
- Double label Fairtrade/organic deliver the best results (in the study), as an examination of the hidden costs deferred to the society reveals: for each dollar linked to coffee exports, the societal costs are reduced by 45% in Ethiopia, 58% in Colombia and 66% in Peru.

Oxfam-Magasins du monde: Fair Trade Textiles and Decent Work in India

- India is the 3rd largest world exporter of textile products and clothing, which makes this sector one of the pillars of the Indian economy.
- It represents a total turnover of \$33 billion, 4% of the gross domestic product (GDP) and 12% of the total value of exports.
- The textile/clothing sector represented nearly 35 million workers in 2013, 8 million of these solely in the area of clothing.
- Overall, 60% of textile/clothing workers are women.
- According to the official figures, 93% of the total number of workers in all sectors combined are employed informally, one of the highest rates in the world.
- The most recent national census (2011) ascertained the number of children working in India to be 4.3 million (about 2% of all children aged 5 to 14 years), predominantly in agriculture (about two thirds, including in cotton farming).
- Trade union membership in the textile industry is estimated to be only 4%. In contrast, 90% of workers were members of a trade union in one of the large industrial Fair Trade textile organisations covered in this study.

- The number of collective bargaining agreements in textiles is practically non-existent (estimated at only 3% in the formal sector generally).

Traidcraft Exchange: The Estate They're In

- Tea remains one of the most popular drinks in the UK with 165 million cups drunk every day.
- The 'Big 6' UK brands – PG Tips, Twinings, Tetley, Yorkshire, Typhoo, and Clipper – together comprise about 70% of the UK tea market with annual sales of around £500 million and all use tea grown in Assam as part of some of their blends.
- Maternal mortality in Assam is the worst in India with 300 women dying per 100,000 live births. This compares with an Indian average of 167 and a UK average of 10.
- Maternal mortality is even worse in tea estate areas reaching 404 deaths per 100,000 live births – comparable to levels in Sub-Saharan Africa.
- 1 in 3 people in Assam live below the Indian poverty line – a higher rate than most other Indian states and significantly above the Indian national average of 1 in 5.
- Poverty is being reduced more slowly in Assam than in most other Indian states – with meagre progress since 2005.
- Assam tea workers are paid a daily wage of 137 rupees. This is below the Indian national minimum wage of 300 rupees per day for unskilled agricultural workers. This is justified by tea estate owners who point to the 'in kind' benefits they are obliged to provide. 'In-kind' benefits include services such as housing, sanitation, health facilities and primary schools.

Key Statistics By SDG

GOAL 1: No Poverty	
<ul style="list-style-type: none"> The majority of people think it is important for fashion brands to reduce their long-term impacts on the world by addressing global poverty (84%) 	Fashion Revolution Consumer Survey (of 5000 surveyed)
<ul style="list-style-type: none"> In 2017, Peruvian and Ethiopian farmers had an average income that was 20% less than that of the previous 12 years, keeping them below the poverty line. Double label Fairtrade/organic deliver the best results (in the study), as an examination of the hidden costs deferred to the society reveals: for each dollar linked to coffee exports, the societal costs are reduced by 45% in Ethiopia, 58% in Colombia and 66% in Peru. 	Commerce Équitable France: Coffee - The Success Story That Hides A Crisis
<ul style="list-style-type: none"> 1 in 3 people in Assam live below the Indian poverty line – a higher rate than most other Indian states and significantly above the Indian national average of 1 in 5. Poverty is being reduced more slowly in Assam than in most other Indian states – with meagre progress since 2005. 	Traidcraft Exchange: The Estate They're In
GOAL 5: Gender Equality	
<ul style="list-style-type: none"> 39% of brands publish an Equal Pay policy that applies to direct employees 41% of brands publish an Equal Pay policy that applies to supply chain workers 	Fashion Revolution Transparency Index (of 150 brands reviewed)
<ul style="list-style-type: none"> The majority of people think it is important for fashion brands to reduce their long-term impacts on the world by addressing gender inequality (77%). 72% of people said that fashion brands should do more to improve the lives of women making their clothes, shoes and accessories. 	Fashion Revolution Consumer Survey (of 5000 surveyed)
<ul style="list-style-type: none"> 60% of India's textile/clothing workers are women 	Oxfam-Magasins du monde: Fair Trade Textiles and Decent Work in India
<ul style="list-style-type: none"> Maternal mortality in Assam is the worst in India with 300 women dying per 100,000 live births. This compares with an Indian average of 167 and a UK average of 10. Maternal mortality is even worse in tea estate areas reaching 404 deaths per 100,000 live births – comparable to levels in Sub-Saharan Africa. 	Traidcraft Exchange: The Estate They're In
GOAL 8: Decent Work and Economic Growth	

<ul style="list-style-type: none"> • 79% of brands publish a policy on Forced or Bonded Labour in the supply chain • 53% of brands disclose how their Forced or Bonded Labour policy is put into practice • 77% of brands publish a Child Labour policy • 39% of brands disclose how their Child Labour policy is put into practice • 37% of brands publish measurable, long-term commitments or goals on improving human rights 	Fashion Revolution Transparency Index (of 150 brands reviewed)
<ul style="list-style-type: none"> • 39% said that buying clothes made by workers paid a fair, living wage was important • When choosing a fashion brand to buy, consumers said it is important for brands to share detailed information about wages and working conditions for people in its global supply chain (66%) 	Fashion Revolution Consumer Survey (of 5000 surveyed)
<ul style="list-style-type: none"> • The Indian textile/clothing sector represented nearly 35 million workers in 2013, 8 million of these solely in the area of clothing. • According to the official figures, 93% of the total number of workers in all sectors combined are employed informally, one of the highest rates in the world. • The most recent national census (2011) ascertained the number of children working in India to be 4.3 million (about 2% of all children aged 5 to 14 years), predominantly in agriculture (about two thirds, including in cotton farming). • Trade union membership in the textile industry is estimated to be only 4%. • In contrast, 90% of workers were members of a trade union in one of the large industrial Fair Trade textile organisations covered in this study. • The number of collective bargaining agreements in textiles is practically non-existent (estimated at only 3% in the formal sector generally). 	Oxfam-Magasins du monde: Fair Trade Textiles and Decent Work in India
<ul style="list-style-type: none"> • Assam tea workers are paid a daily wage of 137 rupees. This is below the Indian national minimum wage of 300 rupees per day for unskilled agricultural workers. This is justified by tea estate owners who point to the 'in kind' benefits they are obliged to provide. 'In-kind' benefits include services such as housing, sanitation, health facilities and primary schools. 	Traidcraft Exchange: The Estate They're In
GOAL 10: Reduce inequality within and among countries	

<ul style="list-style-type: none"> • Over the last 20 years roasters and retailers have reaped an additional 1.177 billion euros from annual coffee sales, while farmers and traders have earned just 64 million euros more. • Over the last 20 years the revenue gained by the coffee producing countries has gone down from 24% of the value in the mid-90s to 16% in 2017. 	<p>Commerce Équitable France: Coffee - The Success Story That Hides A Crisis</p>
<p>GOAL 12: Responsible Consumption and Production</p>	
<ul style="list-style-type: none"> • 55% of brands publish measurable, long-term commitments or goals on improving environmental impacts 	<p>Fashion Revolution Transparency Index (of 150 brands reviewed)</p>
<ul style="list-style-type: none"> • When buying clothes, more than one in three consumers surveyed across the five largest EU markets said that they consider social (38%) and environmental impacts (37%). • The majority of people think it is important for fashion brands to reduce their long-term impacts on the world by addressing global poverty (84%), climate change (85%), environmental protection (88%) and gender inequality (77%). • The majority of consumers want to know more about the clothes they buy: <ul style="list-style-type: none"> ○ 67% of people would like fashion brands to tell them where the materials used in their products come from; ○ 59% would like to know how their clothes are manufactured; ○ 61% of people are interested in learning about what fashion brands are doing to minimise their impacts on the environment and to protect their workers' human rights; ○ 59% of people are interested in learning what fashion brands do to improve the lives of people in the societies where they manufacture their products. • The majority of consumers (68%) agreed that the government has a role to play in ensuring that clothing (including shoes and accessories) is sustainably produced. • When choosing a fashion brand to buy, consumers said it is important for brands to: <ul style="list-style-type: none"> ○ publish how products are sustainable on the packaging (72%) ○ explain what products are made from on the packaging (77%) ○ make it clear where they source materials, ingredients and components from and who manufactured the product (77%) ○ share detailed information about wages and working conditions for people in its global supply chain (66%) ○ provide information about how they apply socially responsible practices (70%) ○ provide information about how they apply environmentally responsible practices (74%) 	<p>Fashion Revolution Consumer Survey (of 5000 surveyed)</p>

<ul style="list-style-type: none"> A large majority of consumers think that fashion brands should publish the factories used to manufacture their clothes (80%) and which suppliers they use to source the materials used in their clothing (77%). 	
<ul style="list-style-type: none"> In France, coffee consumption at home has increased 54% in 15 years. France is 1st in the world market for coffee capsule & pods in per capita consumption. Capsule & pods made up 58% of coffee consumed at home in 2017. There is a high level of market concentration of the coffee sector. In France 3 roasters are controlling 81% of the coffee market and 5 biggest coffee traders account for almost 40% of coffee exports & imports. An individual coffee capsule costs on average cost 50/60 euros per kg, compared to only 3 euros for a pack of Arabica of ground coffee of 250 grams. Consumers are buying their coffee in a very higher price, yet it doesn't at all trickle down to the producers. In Peru and Ethiopia, each dollar linked to coffee exports in 2017 generated between 85 and 90 cents of hidden costs at the expense of these countries and their populations (the "societal costs"). 	Commerce Équitable France: Coffee - The Success Story That Hides A Crisis
<ul style="list-style-type: none"> Tea remains one of the most popular drinks in the UK with 165 million cups drunk every day. The 'Big 6' UK brands – PG Tips, Twinings, Tetley, Yorkshire, Typhoo, and Clipper – together comprise about 70% of the UK tea market with annual sales of around £500 million and all use tea grown in Assam as part of some of their blends. 	Traidcraft Exchange: The Estate They're In
GOAL 13: Climate Action	
<ul style="list-style-type: none"> 55% of brands publish measurable, long-term commitments or goals on improving environmental impacts 	Fashion Revolution Transparency Index (of 150 brands reviewed)
<ul style="list-style-type: none"> The majority of people think it is important for fashion brands to reduce their long-term impacts on the world by addressing climate change (85%) and environmental protection (88%). 61% of people are interested in learning about what fashion brands are doing to minimise their impacts on the environment and to protect their workers' human rights; When choosing a fashion brand to buy, consumers said it is important for brands to: <ul style="list-style-type: none"> publish how products are sustainable on the packaging (72%) provide information about how they apply environmentally responsible practices (74%) 	Fashion Revolution Consumer Survey (of 5000 surveyed)

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Links to Reports

Published PDFs

- Estatal de Comercio Justo: Fair Trade and Sustainable Development Goals – [Spanish](#) and [Catalan](#)
- [Fashion Revolution: Transparency Index 2018](#)
- [Fashion Revolution: Consumer Survey 2018](#)
- Commerce Équitable France: Coffee - The Success Story That Hides A Crisis - [French](#) and [English](#)
- Oxfam-Magasins du monde: Fair Trade Textiles and Decent Work - [French](#)
- [Traidcraft Exchange: The Estate They're In](#)

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Click here to view the [Basecamp folder containing all the reports](#). Or click on the individual links below to download the reports directly.

- Fair Commerce: Fair Trade and Sustainable Development Goals – [Spanish](#) and [English Summary](#)
- [Fashion Revolution: Transparency Index 2018](#)
- [Fashion Revolution: Consumer Survey 2018](#)
- Commerce Équitable France: Coffee - The Success Story That Hides A Crisis – [French](#) and [English](#)
- [Oxfam-Magasins du monde: Fair Trade Textiles and Decent Work](#)
- [Traidcraft Exchange: The Estate They're In](#)