

Gender, health, labor, and inequities: a review of the fair and alternative trade literature

Vincent Terstappen · Lori Hanson ·
Darrell McLaughlin

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Abstract Although research into fair and alternative trade networks has increased significantly in recent years, very little synthesis of the literature has occurred thus far, especially for social considerations such as gender, health, labor, and equity. We draw on insights from critical theorists to reflect on the current state of fair and alternative trade, draw out contradictions from within the existing research, and suggest actions to help the emancipatory potential of the movement. Using a systematic scoping review methodology, this paper reviews 129 articles and reports that discuss the social dimensions of fair and alternative trade experienced by Southern agricultural producers and workers. The results highlight gender, health, and labor dimensions of fair and alternative trade systems and suggest that diverse groups of producers and workers may be experiencing related inequities. By bringing together issues that are often only tangentially discussed in individual studies, the review gives rise to a picture that suggests that research on these issues is both needed and emerging. We end with a summary of key findings and considerations for future research and action.

Keywords Fair trade · Alternative trade · Gender · Health · Labor · Equity

Abbreviations

FLO Fairtrade Labelling Organizations International
NGO Non-governmental organization

Introduction

Existing research into fair and alternative trade networks reveals a continuum of practices operating in different contexts around the world. Fair trade itself has become a dynamic social process with different voices and contested agendas being put forward. As this dialogue continues to expand, researchers and other stakeholders must begin to critically examine how fair and alternative trade is operating within different contexts.¹ Thus, there is a need for a comprehensive, critical review of the fair and alternative trade literature.

The need for knowledge synthesis and, subsequently, the development of evidence based research and action programs, policies, and activities is well established (Grimshaw 2010). There is a growing body of research detailing methods of knowledge synthesis and, building on this literature, this project draws on one such method: the scoping review. We were guided in this review by the works of critical theorists, like Horkheimer (1982), and

V. Terstappen (✉) · L. Hanson
Department of Community Health and Epidemiology,
University of Saskatchewan, 107 Wiggins Road,
Saskatoon, SK S7N 5E5, Canada
e-mail: vlt824@mail.usask.ca

L. Hanson
e-mail: lori.hanson@usask.ca

D. McLaughlin
Department of Sociology, St. Thomas More College,
University of Saskatchewan, 1437 College Drive,
Saskatoon, SK S7N 0W6, Canada
e-mail: dmclaughlin@stmcollege.ca

¹ Recent changes within the fair trade certification system, with Transfair USA resigning its membership from Fairtrade Labelling Organizations International (FLO), exemplifies this and provides a timely and vivid illustration of the importance of exploring the social dimensions of fair and alternative trade in different contexts.

therefore strove to contribute to a reflexive process for fair trade, supporting the emancipatory potential of the movement by drawing out some of the contradictions from within.

This review has two primary objectives. First, it seeks to explore, synthesize, and report the extent, nature, and results of research on the various social development outcomes for organized agricultural producers involved in fair and alternative trade networks.² Second, by reviewing what is known, it identifies gaps in the existing literature on the social dimensions of these networks. Two questions guide this review:

1. How, and under what circumstances, does the existing literature define, measure, and report on the diverse lived social dimensions of fair and alternative trade?
2. What is the extent and nature of research on programs, policies, and experiences of Southern producers related to the social dimensions of fair and alternative trade?

Critical theories have emerged in connection with the many social movements like fair and alternative trade that are aimed at decreasing domination and increasing freedom in all their forms. At the risk of oversimplifying this complex group of theories, critical theories not only explain what is wrong with current social structures and processes and identify the actors to change it, but also provide both clear norms for criticism and achievable practical goals for social transformation. What sets our critical review apart from “traditional” theory is the extent that it explicitly seeks to inform human emancipation through fair trade, “to liberate human beings from the circumstances that enslave them” (Horkheimer 1982, p. 244).

What strikes us as especially appealing about critical inquiry is its aim to create the reflective conditions necessary for the practical verification of its inquiry. If one applies the normative ideals of critical theory to the institute of fair trade, then the impact of the structure and process of fair trade on social dimensions impacting one marginalized group, women, for example, becomes a valuable way to move the entire emancipation project of fair trade forward.

Importantly, our focus on the social dimensions of fair trade rather than the economic and environmental dimensions is not meant as a statement of importance nor is it meant to imply that the three are disconnected in any way.³ Instead, the focus on social dimensions is a methodological

decision and a natural extension of our critical lens. Adopting this approach allows us to draw out and report on particular aspects of the fair trade experience that, though they appear in several studies, are not well developed, only briefly mentioned, and frequently included as tangential foci despite calls from community partners, fair trade organizations, and researchers to examine these social dimensions.

Methods

A scoping review drawing on insights from Arksey and O’Malley (2005), Pawson (2002), and the *Cochrane Handbook for Systematic Reviews of Interventions* (Higgins and Green 2009) was considered to be the most appropriate methodology as the primary aim of this project was to map key concepts and the state of the existing research rather than to synthesize particular results to answer specific research questions.⁴ A scoping review differs from other review methodologies in three important ways that supported its use in this context:

1. Scoping reviews focus on breadth and allow for the inclusion of research from a wide array of disciplines and epistemological traditions, which is particularly valuable in this case as no thorough review of the fair trade literature exists⁵ and, as mentioned, producer experiences and contexts differ significantly and are very complex—two factors that support a scoping review approach (Mays et al. 2001).
2. Scoping reviews do not evaluate individual studies’ methodologies. Given the contexts and experiences that characterize fair trade, we chose to include all manner of reports and articles. This was consistent with our objectives as a wide swath of studies influence fair trade policy and practice.
3. Unlike some systematic literature reviews, the goal of a scoping review is not to synthesize and compare specific data points or findings and make statistical claims.

However, because many existing scoping reviews do not detail their methods (Arksey and O’Malley 2005) and are thus characterized as non-systematic (Anderson et al. 2008), we adapted our methods and adopted from the outset an explicit, systematic, and replicable approach to searching, reviewing, selecting, and synthesizing the

² For the remainder of the article, the term “fair and alternative trade networks” will be shortened to “fair trade.” Table 3 illustrates the scope of markets subsumed under this category.

³ In fact, categorizations of the studies examined for this review (Fig. 1) reveal that almost all research into fair trade explores more than one impact area.

⁴ See also the description of a scoping study in Mays et al. (2001).

⁵ Review articles do exist but their methodologies are poorly defined and they focus on a wide swath of impacts and include few case studies. This article expands on existing reviews by focusing on the social dimensions of fair trade as well as by detailing a systematic review methodology.

literature by drawing on Pawson's (2002) descriptive-analytical method and insights from Higgins and Green (2009). These were incorporated as appropriate throughout the scoping review, which followed the following stages described by Arksey and O'Malley (2005).

Identifying the research question

To capitalize on the broad scope afforded by the scoping review methodology and to reflect our critical lens, the research questions articulated earlier enquire about what is known in the literature about the "social dimensions" of fair trade. By synthesizing what is known, we reveal gaps in the literature and practice of fair trade and are given the opportunity to critically reflect on next steps. We define "social dimensions" based on fieldwork experiences and documents from the Fairtrade Labelling Organizations International (FLO). Simply stated, social dimensions of fair trade were considered to be those aspects that were not economic or environmental in nature and through which inequities may be expressed or experienced—making them a key space for critical exploration. The social dimensions under consideration included: health, gender, land ownership, labor, race, class, education, co-operative membership, capacity building, household relations, housing, and food security. It was the original authors' own definitions of these issues that were privileged, not those of the review team.

Identifying relevant studies

Four search methods were used to identify potentially relevant studies. First, 10 electronic databases were searched: Web of Science, Sociological Abstracts, PsycINFO, Academic Search Complete, ArticleFirst (and ECO), Expanded Academic ASAP, Gender Studies Database, JSTOR, EconLit, and the online library of the Fair Trade Resource Network. Searches always used the widest search setting available and included a combination of the keywords: "fair trade," "fairtrade," "ethical trade," "alternative trade," "direct trade," "comercio justo," "comercio equitativo," "comercio equitativo" (separated by the Boolean operator OR), and one of 32 keywords related to social dimensions of trade.⁶

⁶ Keywords included gender*, women, woman, female, health*, "quality of life," wellbeing, "well being," mortality, labour*, labor*, work*, producer, mozo, tenure, ownership, housing, education, "capacity building," literacy, cooperative*, empower*, participation, leadership, membership, equity, class, race, discrimination, "social status," "social development," and security. The Boolean operator * searches for all forms of a root word. Health*, for example, searches for health, healthy, healthcare, and so forth.

Following this, three supplementary search strategies included: reviewing the reference lists of key articles and special issues, tracking citations of noteworthy resources, and browsing the resources of existing networks and key organizations known to the review team.

Given the multidisciplinary nature of the electronic databases used and the breadth of the search terms, articles and reports that were deemed to be obviously irrelevant based on their titles and abstracts were excluded, as were duplicates. This initial exclusion, done without the full text of the resources, followed the *Cochrane Handbook for Systematic Reviews of Interventions* (Higgins and Green 2009), which advises selection at this stage to be "overly inclusive." All other resources were thus deemed to be "potentially relevant" and were inputted into RefWorks bibliographic software.

Selecting studies for inclusion

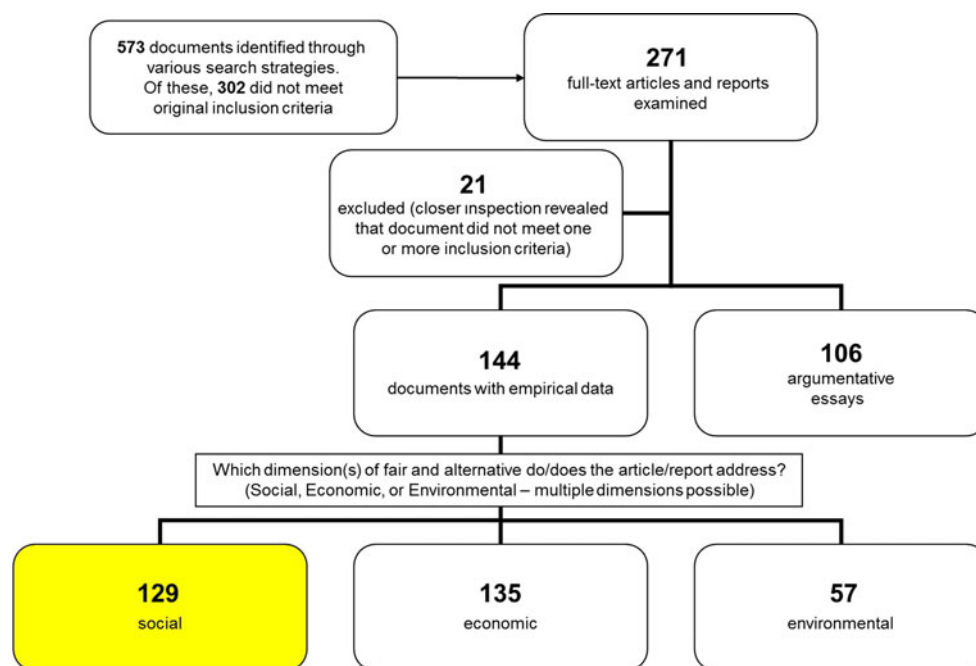
The various search strategies yielded 573 "potentially relevant" resources, which were then subject to the inclusion criteria identified by the research team. Once again following Higgins and Green (2009), we set up inclusion criteria prior to searching for studies.

Specifically, in order to be included in the review, all studies had to include research that:

- Related to fair and alternative trade networks. This refers to concepts such as certified Fair Trade, direct trade, solidarity trade, and others. This excluded research on conventional trade channels, exclusively organic production, World Trade Organisation conceptualizations of "fair trade" (that is, ideas articulated in the Doha Development Round), corporate social responsibility, and corporate-driven ethical sourcing initiatives (like the Ethical Trade Initiative in the United Kingdom).⁷ Notably, many producer organizations and companies are involved in overlapping initiatives so any mention of fair and alternative trade was included, even if a group's primary market focus was

⁷ This criterion allowed for the inclusion of different voices and contested agendas within fair and alternative trade networks and situated fair trade as a dynamic social process. Although they differ in certain regards, the included perspectives all go "beyond the commercial transaction and gives the producers tools of empowerment" (Renard 2003, p. 91). We contrast this with initiatives that operate predominantly through corporate codes of conduct in mainstream markets. Further, fair and alternative trade networks can be seen to be operating at a macro-economic level, aiming to "change unequal trade relationships" as opposed to offering minimum protections for workers (Valor 2006, p. 271). One reason for this admittedly broad definition of fair trade—which allowed for the inclusion of a number of different approaches to fair trade production and a rich variety of producer experiences—was that a number of the original papers were not clear about the certification models under which the producer associations were organized.

Fig. 1 Identification of studies for inclusion in the scoping review



elsewhere (Fair Trade labelled wine, for example, that is also part of an Ethical Trading Initiative).

- Focused on fair trade as experienced by agricultural producers, co-operatives, or comparable producer organizations. Handicraft and mineral organizations were excluded, as were consumer studies.
- Was published or indexed between 1990 and July 2010.
- Was published as a report or journal article. Books, theses, conference presentations, and book chapters were excluded due to time and full text access constraints. We made a conscious choice to include both peer-reviewed and non-peer-reviewed resources in this review because of both the breadth of fair trade experiences that we sought to capture as well as the frequent use of these resources by various stakeholders to evaluate and inform policy and practice.⁸
- Was in English or Spanish.
- Had accessible full text versions.

There were 250 articles and reports that met these criteria and were subsequently categorized based on whether they were empirical or “argumentative essays.”⁹ Empirical studies were further categorized as including any discussion of social, economic, and/or environmental dimensions

⁸ Although we included a wide variety of peer-reviewed and non-peer-reviewed literature, our search strategies used reputable academic databases and accepted scholarly methods, which provided an inherent inclusion filter.

⁹ Argumentative essays were defined as: (a) not containing any original, uncited empirical data or (b) only discussing program or certification objectives rather than impacts. Review articles were excluded from this categorization and considered to be empirical.

of fair trade. Only those articles and reports with some mention of social dimensions of fair trade—129 in total—were ultimately included in this review. Figure 1 details this identification and selection process.

Charting the data

Following the identification of the 129 studies that met the inclusion criteria and described some social dimension of fair trade, we created a data chart to identify and organize key concepts and findings from each study. Guided by Pawson’s (2002, p. 172) descriptive-analytical method, the data chart allowed the researchers to examine the studies “...in relation to a common analytical framework, so the same template of features is applied to each study scrutinized.” The final result is a “data matrix” (Pawson 2002, p. 172) detailing key aspects of each original study. Unlike other types of knowledge synthesis, the focus is on contextualizing, synthesizing, and reporting from a diverse body of evidence and not on specific data extraction or the use of statistical methods. Thus, to allow for the inclusion of a wide array of findings, the data matrix is text based and included fields for the study’s definition of social dimensions, key findings, as well as specific fields for gender, health, and co-operative considerations.

Reporting the results

The final stage of the scoping review is the interpretation and reporting of the results from the data matrix. Because we adopt a critical lens, we follow Pawson (2002) and

Table 1 Products studied

Product	Frequency
Coffee	82
Cocoa	10
Banana	10
Wine/grapes	8
Tea	7
Cut flowers	5
Other horticulture	3
Quinoa	2
Cotton	1
Shea	1
Flower bulbs	1
Brazil nuts	1
Rice	1
Orange	1
Beekeeping/honey	1
Shrimp	1
Banana chips	1
Not specified or “various”	7

focus on interpreting the findings rather than simply summarizing them.

Results

Scope of the literature

Given the importance of focusing on the breadth of experiences and contexts in fair and alternative trade markets, it is encouraging that scholarship in this area represents diverse products,¹⁰ regions, and markets, though research on Fair Trade certified coffee in Central America is the most common area of study.

Table 1 describes the products included in the review. Some articles deal with multiple products, which have each been recorded separately in the table, while other articles speak broadly about fair trade and provide unspecified evidence, in which case they have been categorized as “not specified or ‘various’.”

What is not reported is the type of organization producing the product in question as descriptions and labelling of organizational types is not consistent. While we originally set out to include only those projects that describe agricultural co-operatives, it became clear that fair trade is characterized by vastly different types of co-operatives and organizations—from more traditional groups of a few dozen

producers to large enterprises of thousands of producers. Despite many sharing the label of “co-operative,” these organizations differ significantly in terms of producer relationships, organizational structure, and power dynamics and thus we felt that this initial criterion had created a false category. We therefore revised our inclusion criteria to include a greater variety of organizations, including co-operatives, co-operative federations, plantations, and producer associations.

Although Central America is overrepresented in the research literature—not surprisingly given the origins of the certified Fair Trade label and the prominence of specialty coffee in the region—the review includes research from around the world, as seen in Table 2.¹¹ As in Table 1, if studies included multiple sites, each of these was noted in the table. If the study presented findings from a broader geographical region, they were categorized as having a continental focus. As is the case with review articles, where no single regional focus existed, articles were categorized as “not specified.”

As noted, several different alternative markets are included in the review, though Fair Trade certified (the label of the FLO) is by far the most common (Table 3). Notably, however, Fair Trade is framed in different ways by different researchers. While some researchers frame Fair Trade as a counter-hegemonic, solidarity-based challenge to conventional trade, others see it as a development intervention or as merely a set of standards.

Other markets discussed in the literature include direct trading relationships, codes of practice with a more pronounced social agenda, and sustainable coffee—a catch-all term for many different types of coffee certification. In some cases, authors were not clear about defining which certification model is guiding the producers’ operations. In addition, the vast majority of the organizations studied are involved in multiple, overlapping alternative markets, especially the pursuit of organic certification along with fair trade. These different, sometimes overlapping certifications being interpreted and experienced in different contexts will result in unique impacts on the social dimensions that we explore in this review. As such, it is difficult to attribute specific impacts to fair trade exclusively, and for this reason we strive to highlight contexts and experiences, not speculate about causal pathways.

Finally, a scoping review allows for the inclusion of work from a variety of scholarly disciplines and, as a result, a number of methodological traditions. In Table 4, the research methods adopted by each article and report are categorized

¹⁰ Thank you to the anonymous reviewer who noted the important distinction within fair trade between the terms product and commodity.

¹¹ By virtue of including only those articles that explored producer experiences within fair and alternative trade networks, the review became limited to research geographically located in the Global South.

Table 2 Country or region of the association or producers studied

Country/region (of association/producers in study)	Frequency
Central America	
Mexico	29
Guatemala	16
Nicaragua	14
Costa Rica	8
El Salvador	5
South America	
Peru	8
Bolivia	5
Ecuador	2
Venezuela	1
Chile	1
Colombia	1
Brazil	1
Africa	
South Africa	11
Tanzania	8
Kenya	7
Ghana	6
Burkina Faso	2
Mali	1
Zambia	1
Caribbean	
Windward Islands (including St. Vincent, St. Lucia, Dominica, Martinique, Grenadines, and Grenada)	3
Dominican Republic	4
Asia	
India	2
Indonesia	2
Thailand	2
Philippines	1
China	1
Latin America (unspecified)	5
Africa (unspecified)	1
Not specified (e.g., in review article)	17

Table 3 Primary alternative market focus of the included studies

Primary market focus	Frequency
Fair trade (FLO certified)	90
“Sustainable coffee” (multiple certifications including Utz Kapeh, fair trade, bird friendly, CAFE, shade-grown, Eco-O.K. (rainforest alliance), and organic)	17
Other “alternative” markets	10
Codes of practice (i.e., ethical sourcing, but with more pronounced social agendas. Includes BEE, WIETA, worker-owned, etc.)	9
Direct trading relationship	5

Table 4 Research methodologies used in the included research studies

Research methods	Frequency
Qualitative	40
Quantitative (e.g., survey, close-ended interviews, etc.)	4
Mixed	33
Not given or not clear (i.e., “field research”)	40
Review article	12

into broad categories of qualitative, quantitative, and mixed. The most popular method in the articles was interviewing, most often semi-structured, and this and other qualitative methods were occasionally complemented by quantitative approaches (categorized as “mixed” in the table). Purely quantitative approaches—such as the use of close-ended surveys only—were rare. Perhaps the most important finding here is that nearly one-third (31 %) of articles and reports either did not explain their methods or did not describe them clearly enough so as to allow for categorization into even the broadest of methodological traditions. This should be seen as a major concern for fair trade researchers as it calls into question what type of information is being used to inform fair trade’s emancipatory potential and to make policy and program decisions in fair trade networks. Even articles that could be categorized as quantitative, qualitative, or mixed very rarely gave adequate descriptions of their methods beyond simply naming them. As previously discussed, the quality and rigor of individual studies will not be explored in this scoping review; however, the difficulty we had categorizing empirical research into methodological traditions speaks to the urgent need for more systematic and rigorous research into fair and alternative trade networks.

We now move into a discussion of the social dimensions of fair trade. The four considerations included in this review were chosen because of their frequency in the literature and because of their role in either supporting or minimizing the ability of fair trade to meet its general objective of supporting and empowering marginalized groups. Thus, this review will critically detail the scope of the literature in the areas of gender, health, labor, and equality.

Gender

Despite being an explicit objective of most fair and alternative trade networks and a consideration within FLO’s new global strategy¹² (FLO 2009), gender equity and the

¹² For a more thorough description of FLO’s new global strategy, see FLO (2009), which notes that to maximize the impact of fair trade, FLO “will improve our understanding of the particular contexts in which different groups of people experience hardship. This will include strengthening our policies on equality and diversity within organisations in respect of issues such as gender” (p. 6).

gendered dimensions of fair trade are repeatedly described in the literature as areas in need of further investigation (Nelson and Pound 2009). Although some case studies reveal that important progress is being made in fair trade, most research that considers gender shows little progress and, in some cases, finds that fair trade may even be reinforcing existing inequitable institutions and systems.

Before detailing those findings, it is important to note that gender equity and women's involvement in fair trade still maintains a very low profile in the research literature—Nelson and Pound (2009, p. 32) note a “complete lack of systematic and disaggregated data in the evidence base.” Of the articles we reviewed, 39 % do not include any mention of gender or women at all and an additional 12 % only briefly allude to gender by mentioning a single women's program supported by the producer organization or by an external non-governmental organization (NGO) (Brown 1997; Cycon 2001, 2005; Hudson and Hudson 2003; Macdonald 2007; Milford 2004; Mutersbaugh 2005; Nel et al. 2007; Nigh 2002; Otero 2004; Pirotte et al. 2006; Raynolds et al. 2004; Raynolds and Ngcwangu 2010; Rice 2003; VanderHoff Boersma 2009; Wilson 2010). The initiatives named—and that is essentially all that is done—in these studies include a women's group responsible for creating the packaging for Rooibos tea in South Africa co-operatives (Nel et al. 2007), targeted education programs in Mexican coffee co-operatives (Milford 2004), a premium funded printer for a women's newsletter in Ghana (Brown 1997), and a women's coffee brand (Rice 2003). Some of the initiatives (Brown 1997; Nigh 2002; Otero 2004; Raynolds et al. 2004; VanderHoff Boersma 2009) are specifically named as projects funded by the Fair Trade social premium while others (Cycon 2001; Macdonald 2007; Pirotte et al. 2006; Wilson 2010) are NGO projects based out of the producer organization. The latter situation, also noted in other articles (Bacon 2010a; Bassett 2010; McMurtry 2009; Taylor 2002), implies that women's projects may be initiated only in response to pressure and funding from those outside of local organizations (Fisher 1997), which calls into question both their sustainability and empowerment potential.

Specific women's programs are also mentioned in the articles from various contexts with a more developed gender focus (Arce 2009; Bacon 2010a; Eshuis and Harmsen 2003; Jones and Bayley 2000; Lyon 2007a, b; McMurtry 2009; Murray et al. 2006; Nelson et al. 2002; Ronchi 2002; Simpson and Rapone 2000; Taylor 2002; Tulet 2010). However, regardless of the extent of gender considerations in the study, these programs remain by and large unevaluated in the literature and are most often simply listed alongside other projects like infrastructural improvements and scholarship programs. Importantly, these women's projects are often found outside of the

realm of the production of the fair trade product (e.g., coffee) (Eshuis and Harmsen 2003; Jones and Bayley 2000; Murray et al. 2006; Nelson and Pound 2009) and include programs such as the distribution of corn mills and marketing of chickens in a Mexican coffee co-operative (Simpson and Rapone 2000) and the production of marmalade on a Peruvian co-operative (Tulet 2010). Regarding the efficacy of such interventions, Ronchi (2002, p. 21), working with a Fair Trade certified co-operative in Costa Rica, found that “sporadic efforts of the co-operatives to contribute to the empowerment of women have had limited success, and this mainly due to the unfocused nature of the projects and interventions.”

Women's participation is a common, though arguably insufficient, measure of gender equity in producer organizations. Further, some authors have cautioned that participation figures may be overstated (Bassett 2010; Ronchi 2002), as in one case in West Africa wherein Fair Trade certification requirements for cotton may result in women being named on paper as producers for fair trade markets only to allow men to continue to produce for the conventional market, which would otherwise not be possible (Bassett 2010). Nonetheless, many authors report very low women's participation (Bacon et al. 2008; Bacon 2010a; Bassett 2010; Dolan 2008; Eshuis and Harmsen 2003; Fisher 1997; Fridell et al. 2008; Jones and Bayley 2000; Le Mare 2008; Lyon 2007a, b, 2008; Murray et al. 2006; Ronchi 2002; Ruben et al. 2009; Shreck 2002; Simpson and Rapone 2000; Tiffen 2002; Utting-Chamorro 2005). There are a few exceptions to this (Doherty and Tranchell 2005; Moore 2010; Moseley 2008; Torgerson 2010) including a cocoa co-operative in Ghana that was initially proposed by women (Doherty and Tranchell 2005) and a South African land reform initiative currently producing wine (Moseley 2008) that mandated equal gender participation in order to access government grants. Bassett (2010) writes about a co-operative in Burkina Faso with 40 % female membership, though this is linked to the organization's direct relationship with a Northern company whose CEO purposefully sought to involve women (a co-operative in a similar region without this direct relationship reported women's participation at 6 %).

Five articles (Bezaury 2007; Lyon et al. 2010; Torgerson 2007, 2010; Utting 2009) with findings from Mesoamerica and the Caribbean noted that women's participation is increasing, with some (Bezaury 2007; Tulet 2010) claiming that increasing women's participation and promoting gender equity are explicit objectives in the organization. In other cases where equal participation is written directly into codes, standards, or policies, the impact is unclear (McEwan and Bek 2006; Raynolds and Ngcwangu 2010), prompting some authors to comment that the standards do not go deep enough (Lyon 2008;

Tallontire et al. 2005)—ignoring issues like maternal rights and maternity leave—that compliance is low and that structural gender issues are too big for any one code or label to address (McEwan and Bek 2009a). Tallontire (2002) finds that the use of codified and broadly applicable standards is inherently gender blind. These are particularly valuable findings for certification organizations like FLO, for example, which currently codifies gender equity predominantly as “non-discrimination,” with a long-term progress standard encouraging organizations to directly support the participation of “disadvantaged or minority groups” and “to give special attention to the participation of female members” (FLO 2011, p. 32).

To begin to address women’s low participation in fair trade, we look to several authors who suggest reasons that include existing household and other labor burdens (Dolan 2008; Lyon et al. 2010; Ronchi 2002), male control and disruption (including machismo) (Bacon 2010a; Bassett 2010; Chi 2002; Lyon 2008; Nelson and Pound 2009; Ronchi 2002; Tallontire 2000; Utting-Chamorro 2005), health concerns in areas of conventional production and pesticide use (Bassett 2010), lack of education and self-esteem (Lyon 2007b; Utting-Chamorro 2005) and limited access to productive resources, capital, and support (Dolan 2008; Lyon 2008; Utting-Chamorro 2005). These studies include findings from Kenya, Nicaragua, Costa Rica, Guatemala, Mexico, Mali, Burkina Faso, and China across various types of products. Regarding a coffee co-operative in Guatemala, Lyon (2008, p. 263) finds that female co-operative members are “largely an afterthought, second to the business at hand, coffee commercialization.” Most importantly, research out of Tanzania notes that women are not represented in the coffee co-operative despite providing essential labor (Tallontire 2000), a finding also noted in horticultural production in southern Africa (Tallontire et al. 2005), where women workers, despite outnumbering men in many positions and providing substantial labor inputs, are underrepresented in workers’ committees and unions associated with their plantations. This serves as an important reminder that low participation should not be interpreted as lower burdens of productive work or lower investments of time and energy by women. Nelson and Pound (2009, p. 35) found that “the increased workload incurred by new certification requirements ... tends to fall more upon the shoulders of female producers and yet often they have less control over cash crop income.”

Further exploring the characteristics of women’s participation, there is conflicting data with regards to women’s involvement in administrative roles within the producer organization. Some studies of cocoa in Ghana and bananas in the Windward Islands find women’s involvement to be quite high (Doherty and Tranchell 2005; Tiffen 2002; Torgerson 2010) and Bacon (2010a) reports that women

occupy general manager positions in Nicaragua’s three largest Fair Trade co-operatives. Lyon (2008), reporting on a coffee co-operative, notes some decision-making roles for women though notes that these are concentrated in specific non-coffee projects. Further, Simpson and Rapone (2000) find that women affiliated with a coffee co-operative in Mexico were only involved in administrative roles locally and not at the national level. In most cases, however, women’s participation in administrative roles is found to be very low (Bacon 2010a; Besky 2008; Fridell et al. 2008; Imhof and Lee 2007; Le Mare 2008; Lyon 2008; Lyon et al. 2010; Ronchi 2002; Taylor 2002; Wright and Madrid 2007). Other roles may be appearing for women through fair trade, however, as they have been documented taking on more responsibilities in roles such as inspectors in Mesoamerica coffee communities (Lyon et al. 2010) and promoters in an ethical cocoa production and trading scheme run by a church-based organization in Ecuador (Nelson et al. 2002).

Other studies have also found benefits to women participating in fair trade. These findings describe women’s access to credit (Bacon et al. 2008), the promotion of entrepreneurship (Doherty and Tranchell 2005), access to training opportunities for women (Bezaury 2007; Imhof and Lee 2007), and health benefits as in the case of citrus farms in South Africa (Robins et al. 1999). Additionally, because women members can participate in discussions regarding the allocation of the Fair Trade premium, targeted community investments have been reported (McMurtry 2009; Torgerson 2007) as women have exerted their influence by voting to spend the social premium on services such as childcare in banana-producing organisations in the Windward Islands (Torgerson 2010). In some co-operatives with high gender awareness, household relations are reportedly improving (Bacon 2010a; Chi 2002; Lyon et al. 2010; McMurtry 2009; Utting 2009), as are women’s autonomy, self-esteem, and sense of empowerment (Bacon 2010a; Bezaury 2007; Chi 2002; McMurtry 2009; Mercado Carreon 1996; Utting 2009). Ultimately, however, it is difficult to say with certainty that women members do benefit in the same way as men, as most fair trade researchers do not report gender disaggregated data and use non-differentiated terms like “farmer” and “producer.”

Where findings are disaggregated, many studies (Arce 2009; Bacon et al. 2008; Bacon 2010a; Dolan 2008; Lyon 2007a; Nelson et al. 2002; Shreck 2002) report that the impacts of fair trade on producers are not equitably distributed, with men benefiting disproportionately. On this note, authors working in Ecuador and the Dominican Republic (Nelson et al. 2002; Shreck 2002) note that there is a risky assumption that may lead to this inequitable distribution, notably that producer associations and

organizations are erroneously assuming a trickle-down effect of income and benefits from male heads of household and male producers to women. Many studies in various contexts have noted that fair trade has not changed unjust household relations (Fridell et al. 2008; Le Mare 2008; Lyon 2008; McEwan and Bek 2006; Ruben et al. n.d.) and that men maintain control over decision making (Ruben et al. n.d.; Taylor 2002). Lyon (2008, p. 261) comments that fair trade “standards avoid opening the black box of household relations, including the work conditions of the ‘family labor force’ and the distribution of economic benefits.” In addition, where women’s projects are underway or where women are attempting to get involved in the producer organization, studies of various producer groups in Guatemala, Nicaragua, China, and Burkina Faso have noted that men have not been supportive (Arce 2009; Bacon et al. 2008; Bacon 2010a; Chi 2002; Elias and Carney 2007; Lyon 2008; Lyon et al. 2010; Utting-Chamorro 2005), evidenced by their unwillingness to share resources such as land (Elias and Carney 2007; Lyon 2008) and their uncompromising stance on women’s household labor responsibilities (Lyon et al. 2010).

One encouraging finding pertaining to what is being asked and reported in the research itself is that a relatively high number of articles discuss to varying degrees the gendered dimensions of labor in agricultural communities affiliated with alternative trade networks (Bacon et al. 2008; Besky 2008; Bezaury 2007; Brown 2007; Dolan 2008; Fridell et al. 2008; Le Mare 2008; Lewis and Runsten 2008; Lyon et al. 2010; Martin et al. 2006; McEwan and Bek 2006, 2009a; Moseley 2008; Nelson et al. 2002; Riisgaard 2009; Ruben et al. 2009; Tallontire et al. 2005; Utting-Chamorro 2005; Wright and Madrid 2007). Though some simply note their finding that work burdens differ between men and women, others explore this more profoundly. In general, these studies find that alternative agriculture requires more labor inputs than conventional agriculture and go on to suggest that women often assume this increased labor burden (Fridell et al. 2008; Imhof and Lee 2007; Le Mare 2008; Mercado Carreon 1996). In some cases, including amongst coffee producers in Bolivia and Mexico (Fridell et al. 2008; Imhof and Lee 2007; Le Mare 2008), fair trade is found to increase women’s work even outside of the context of harvest. However, some authors working with coffee-producing organizations in Peru, Costa Rica, and Ghana report that the greater labor demands in alternative systems of production actually increased women’s bargaining power as their labor was in higher demand (Ruben et al. 2009). More commonly, however, gender roles and gendered divisions of labor—linked to cultural traditions and national gender inequities (Dolan 2008; Wright and Madrid 2007)—limited women’s ability to participate in and benefit from alternative trade (Dolan 2008).

Based on the review, a promising way forward for gender equity suggested by several researchers appears to be women’s land ownership and stewardship, as a number of authors write about the crucial role land tenure plays in the equitable distribution of the benefits of fair trade (Bacon 2010a; Dolan 2008; Lyon et al. 2010). In area where producers are organized into co-operatives, land ownership also facilitates co-operative registration and hence access to fair trade benefits. Unfortunately, men control land in most regions, which creates a situation of dependency for women and limits their access to fair trade (Bassett 2010; Tallontire 2000). Unfortunately, Fair Trade standards do not have any direct impact on the gendered dimensions of land ownership and there are no reports of fair trade impacting land ownership with the exception of one coffee-producing region in Mexico where the interaction between male migration and certification requirements led to the transfer of land titles to women (Lyon et al. 2010).

Health

Like gender, health¹³ has a limited profile in the research literature. While 57 % of the articles mention health, for nearly one-third (31 %) of those articles, the only mention of health is the brief naming of health related programs amongst other projects supported either by the fair trade social premium or, in three cases (Ballve 2007; Taylor 2002; Wilson 2010), by NGOs or external donors. Examples of health-related social premium investments—which were simply named and not explored or evaluated—include a mobile clinic supported by a Fair Trade premium in Ghana (Tiffen 2002), improvements to medical facilities in various settings (Brown 1997; Brown 2007; Fridell et al. 2008; James 2000; Linton 2008; Macdonald 2007; Otero 2004), support for specific medical services or health promotion (Bacon et al. 2008; Chi 2002; Raynolds and Ngcwangu 2010), public health measures like potable water (Otero 2004), health education programs (Eshuis and Harmsen 2003; Milford 2004), the purchase of medicines or medical supplies in various settings (Brown 1997; Parrish et al. 2005; Raynolds et al. 2004; Torgerson 2007, 2010), hiring and training health care workers (Eshuis and Harmsen 2003) and the development or subsidizing of health insurance schemes (Raynolds 2009; Ruben et al. 2009; Ruben et al. n.d.).

For findings beyond such health programs, other articles describe the health impacts of fair trade most commonly in reference to the environmentally sustainable production

¹³ The original authors’ conceptualization of health was prioritized when charting the data. No pre-existing definition of health was assumed.

requirements of the alternative trade networks, which in most organizations involves organic certification. In particular, several authors note improved occupational health and safety in organizations that have some interface with fair trade and other standards (Martin et al. 2006; McEwan and Bek 2009b; Nelson et al. 2007; Robins et al. 1999; Taylor 2007), even in cases where compliance with standards was low, as in the case of certain wine-producing organizations in South Africa (McEwan and Bek 2009a). Others report better health outcomes in organizations associated with fair trade due to lower chemical usage and more environmentally sustainable production methods (Conroy 2001; Cycon 2001; Torgerson 2007, 2010; Udomkit and Winnett 2002). Additional health impacts for producers associated with fair trade organizations or producing under fair trade standards include better access to health care (Arnould et al. 2009; Martin et al. 2006; Moore 2010; Nelson et al. 2007), lower child mortality (Becchetti and Costantino 2008; Le Mare 2008), and access to better facilities (Cycon 2001; Torgerson 2007) and health education (Nelson et al. 2007) compared to producers operating outside of the scope of fair trade. In a few articles, authors report general health benefits, without detailing specific areas or determinants of health (Le Mare 2008; Reynolds et al. 2004; Renner and Adamowicz n.d.; Torgerson 2010). These findings have been reported in various contexts and settings. The most explicit and comprehensive exploration of the health outcomes of fair trade can be found in a study by Arnould et al. (2009) who use a health index involving several different indicators to evaluate several coffee-producing co-operatives in Nicaragua, Peru, and Guatemala. They conclude that co-operatives that had been certified longer had better health outcomes than more recently certified co-operatives and that, given the multi-layered nature of health and disease, the relationship between fair trade and health is “complex but positive” (Arnould et al. 2009, p. 199).

Other authors find a more indirect link to health, noting that the higher incomes resulting from fair trade in Tanzania, Mexico, Nicaragua, Guatemala, and El Salvador were used to buy medicines (Fisher 1997; Nelson and Pound 2009; Reynolds 2002; Utting-Chamorro 2005), access basic health care services (Franzen and Borgerhoff Mulder 2007; Utting-Chamorro 2005) and improve household wellbeing in general (Reynolds et al. 2004). Some studies also note that fair trade may improve general health by lowering environmental disease risks through eco-labelling initiatives (Boot et al. 2003), decreased deforestation (Taylor 2007), and a reduced incidence of water-borne illness (Doherty and Tranchell 2005) in fair trade.

Some producer organizations have made explicit policy based attempts to include health in their activities, such as a Bolivian group producing quinoa that bans pesticide use

for health reasons (Ballve 2007), a group producing wine in South Africa that promotes awareness of occupational health and safety standards (McEwan and Bek 2009a), and a coffee co-operative in Mexico that has created a health committee (Simpson and Rapone 2000). Where organizations and certifiers are carrying out health related audits, Moore (2010) cautions that these may only serve to identify and evaluate superficial health and safety indicators rather than assessing health equity. Interestingly, several authors have found that for certain producers, the health benefits of fair trade—especially those related to organic production—are key motivations for leaving conventional production and joining organizations associated with fair and alternative trade (Oelofse et al. 2010; Renner and Adamowicz n.d.; Ronchi 2002; Valkila 2009). These findings include producer organizations in Brazil, Costa Rica, Nicaragua, and Thailand. Organic production was found to be perceived as a solution to health problems (Lyon 2009) and the holistic health benefits may resonate with producers’ own worldview (Gómez Tovar et al. 2005), linking environmental health and human health in an intricate way (Simpson and Rapone 2000; Taylor 2007). One fair trade coffee co-operative in Mexico frames health as “ultimately located in a relationship correctly linking nature, the community, and the spiritual world” (Simpson and Rapone 2000, p. 51).

Similarly, a number of authors working in Kenya, South Africa, and Mexico describe community or individual struggles related to health (Dolan 2008; Hernández Castillo and Nigh 1998; McEwan and Bek 2006; Moseley 2008) and suggest that these struggles influence the organizations’ decision to participate in alternative trade systems. These struggles include alcoholism related to the dop system¹⁴ in South Africa (Moseley 2008), pesticide related diseases in Central America (Cycon 2001), lack of health care services in Kenya (Dolan 2008), inadequate sick leave in Nicaraguan mills (Valkila and Nygren 2010), and poor health and safety standards in South Africa (McEwan and Bek 2006). Unfortunately, the impact of fair trade on these experiences characteristic of conventional production is unclear due to the underreported nature of health related dimensions in fair trade. In addition, because many of the direct health impacts occur during production and harvest, the lack of information on seasonal laborers represents a crucial blind spot for examinations of health in fair trade (Renner and Adamowicz n.d.). Laborers face a double burden of experiencing harmful labor conditions more directly and, as non-members of the producer organization,

¹⁴ The dop system (also known as tot system) involves using cheap wine to partially compensate farm workers. The practice has been illegal since 1965 but its impacts and legacy continue to cause problems.

being unable to access many of the services and programs described earlier.

Labor

As we have seen, the gender and health dimensions of fair trade both touch on aspects related to labor and if we are to fully assess the social dimensions of fair trade, it is important to move beyond the fair trade “producer” and explore fair trade’s impact on laborers and labor relations. Unfortunately, most fair trade literature—including the FLO standards which define small producers as not reliant on workers year round (FLO 2011)—overlooks the fact that fair trade producers are often supported by a team of laborers, which may or may not extend beyond their family. This oversight is misguided as several authors (Arce 2009; Ballve 2007; Becchetti and Costantino 2008; Fridell et al. 2008; Giovannucci and Ponte 2005; Gómez Tovar et al. 2005; Hatanaka 2010; Lyon 2007a, 2009; Lyon et al. 2010; Mutersbaugh 2002; Nelson and Pound 2009; Oelofse et al. 2010; Reynolds 2008; Reynolds et al. 2004; Ruben et al. 2009; Smith 2007; Taylor et al. 2005; Torgerson 2010; Valkila 2009; Wilson 2010) note that fair trade production—and especially organic production—actually creates more work for producers and organizations compared to conventional production and trade systems, a finding reported across multiple contexts. Only one study (Dolan 2010) found less work in alternative trade systems and attributed this to higher investments in production infrastructure. The heavier labor requirement has been found to include both production and administration related work (Calo and Wise 2005; Gómez Tovar et al. 2005) and may involve an increased reliance on family labor (Lyon et al. 2010; Wilson 2010) but more often relies on external labor. Reliable access to labor resources is key to success in fair trade (Arce 2009; Reynolds et al. 2004) and labor access issues can generate inequities. As Arce (2009, p. 1032), working with Guatemalan coffee producers, notes: “while some producers are able to fulfil fair trade and organic requirements, those households that have severe restrictions on labor tend to withdraw from fair trade, engendering social differences and fracturing the life worlds of producers.”

It has also been found that fair trade creates jobs in the community (Bacon et al. 2008; Becchetti and Costantino 2008; Boot et al. 2003; Hernández Castillo and Nigh 1998; Nel et al. 2007; Nelson and Pound 2009; Reynolds et al. 2004; Ruben et al. 2009; Taylor 2002). These jobs may be production related (as in the case of contract laborers) or may stem from social premium investments in community projects. The impact of fair trade on wages for these jobs is unclear, with Eshuis and Harmsen (2003) and Ruben et al. (2009) noting improvements in wages, Bacon et al. (2008) writing that wages vary in the contract situations that they

found in Nicaragua, and others finding no impact of fair trade on wages (Imhof and Lee 2007; Ruben et al. n.d.). Further, the spillover effect of fair trade on wages or prices in the wider community is contested and difficult to measure, though some authors describe potential ripple effects from fair trade (Giovannucci and Ponte 2005; Nelson and Pound 2009; Ronchi 2002), noting specifically its potential and observed role as a community watchdog (Jones and Bayley 2000), a source of market information (Milford 2004), an indicator of floor conditions (Ruben et al. n.d.), and a potential competitor to intermediaries (Eshuis and Harmsen 2003; Imhof and Lee 2007; Tallontire 2002).

Regarding the experiences of individual laborers, several authors working in various contexts have found that they are not benefiting from fair trade (Berndt 2007; Besky 2008; McEwan and Bek 2006; McMurtry 2009; Nelson and Pound 2009; Nelson et al. 2002; Pirotte et al. 2006; Tallontire et al. 2005; Utting-Chamorro 2005; Valkila 2009; Valkila and Nygren 2010; Weber 2007; Wright and Madrid 2007), either because there are no standards or criteria in place to protect them or because the existing standards and criteria are not deep enough to transform labor relations (Moore 2010)—a critique similar to that made in reference to gender inequities. This latter finding was specifically reported in two cases in South Africa and Kenya (McEwan and Bek 2006; Tallontire et al. 2005) wherein some improvements to work conditions were found but worker empowerment was not occurring. Similarly, McEwan and Bek (2009b, p. 263) describe the impact of codes and fair trade provisions on workers as “technical and apolitical” rather than transformative. In some regions, it is argued that national laws (Courville 2003; Valkila and Nygren 2010) or a positive managerial environment (Nelson et al. 2007) may have more of an impact on labor relations and workers than fair trade.

Not benefiting from fair trade is, however, different from being negatively impacted by it. Some authors do report the latter, as in reports of fair trade criteria being interpreted so as to contribute to the replacement of unions in India (Besky 2008), the increased casualization of labor in South African wine production (McEwan and Bek 2009b), or the accrual of benefits exclusively to managers in India (Moore 2010). In addition, by not challenging existing labor norms and practices in hired labor situations, the result may be that “historical inequalities in terms of land-ownership and international trade ... are therefore *solidified* in Fair Trade practice, with no incentive to change these economic realities” (McMurtry 2009, p. 35). Other authors conclude that the impact of fair trade on labor relations depends on contexts (McEwan and Bek 2009a; Moore 2010; Riisgaard 2009), which in some regions, especially wine producing regions in South Africa, may include a racialized division of labor (Bek et al. 2007; McEwan and Bek 2006, 2009a, b).

Importantly, there are also examples of fair trade programs and initiatives that have had a positive impact on labor relations and on laborers themselves. For example, although Valkila and Nygren (2010, p. 331) conclude that “the labor rights of hired workers on Nicaraguan coffee farms and in coffee processing facilities have not been enhanced significantly as a result of Fair Trade,” they found that the social premium impacted hired coffee laborers in Nicaragua since they may benefit from community development programs without having to produce coffee or join an organization. Valkila (2009) also finds higher pay-per-basket for hired labor in fair trade fields in Nicaragua compared to neighboring farms, but tempers this finding by noting that the work is more strenuous than in conventional fields. Other programs associated with fair trade have benefited laborers and labor relations (Giovannucci and Ponte 2005; McEwan and Bek 2006, 2009a; Moseley 2008; Nelson et al. 2007; Riisgaard 2009; Ruben et al. 2009) either directly, as with better occupational health and safety standards as well as more job security, or indirectly, by setting a new tone for labor issues (McEwan and Bek 2009a).

Other interesting aspects of labor in fair trade merit further exploration. In a few cases in Mexico, Peru, Costa Rica, and Ghana (Gonzalez and Nigh 2005; Mutersbaugh 2002, 2005; Ruben et al. n.d.), fair trade has fundamentally re-organized labor relations because of certification criteria and the perceived need for new professionals such as technicians, inspectors, administrators, and others. Similarly, co-operative organizations in fair trade may be less able to rely on volunteer commitments (Gonzalez and Nigh 2005) because of stringent certification requirements, while power relations have been challenged with new actors in the community such as local inspectors. Ruben et al. (n.d.) found that the added income for producers resulting from fair trade has shifted work away from the family and towards wage labor, which has increased family leisure time (though the uncertain impacts of fair trade on workers calls into question the net benefit of this shift). An interesting inequity also exists between permanent workers and casual workers in hired labor situations. In South Africa and Kenya, in companies that have adopted ethical codes including the Flower Label Programme and Max Havelaar Fair Trade for horticultural production, permanent workers are found to be benefiting more from the codes than casual laborers (Martin et al. 2006; Nelson et al. 2007; Tallontire et al. 2005). Similarly, Valkila and Nygren (2010) note that casual and seasonal laborers, like those engaged in mill work in coffee, operate outside of the scope of most fair trade initiatives. Reported linkages between labor and migration related to fair trade (Arce 2009; Calo and Wise 2005; Lewis and Runsten 2008) reveal complex relationships wherein migration, through remittances, may pay for

extra fair trade labor but may also create labor scarcity and thereby increase wages.

Equality

A common thread that weaves together the social dimensions of fair trade is the idea of equity and access within the network. Given the values of justice and solidarity that formed the basis of fair trade, a particularly disconcerting phenomenon reported in myriad contexts is the creation of inequities and elite groups within and amongst producers. By the nature of its standards and niche market status, fair trade may be excluding the most marginalized producers and organizations and may be deepening inequities that exist in Southern communities. Though sometimes reported as a passing finding, this possibility has yet to be fully explored in the existing research, perhaps because many authors and research teams have chosen to focus on successful, well-established producer organizations within fair trade, as Hatanaka (2010) and Smith (2007) argue.

Because of low market demand for fair trade products and certain requirements needed to access fair trade—such as being organized into a co-operative and having sufficient quality assuring infrastructure in the case of FLO-certified coffee—several studies across different contexts have noted that fair trade may be privileging those organizations that already have market access, technical support, and existing infrastructure (Arnould et al. 2009; Diaz Pedregal 2009; Getz and Shreck 2006; Jones and Bayley 2000; Lyon 2009; Méndez et al. 2010; Nel et al. 2007; Nelson and Pound 2009; Paul 2005; Reynolds 2008; Reynolds et al. 2004; Renard 1999; Smith 2007; Tallontire 2002; Taylor 2002; Taylor et al. 2005; Utting-Chamorro 2005; Valkila and Nygren 2010; Weber 2007). Jones and Bayley (2000, p. 31) attribute this to the need of Northern organizations to work with “potentially viable groups,” a characterization that inherently excludes certain communities. An excerpt from Diaz Pedregal (2009, p. 12), worth quoting at length, summarizes this finding:

Both in theory and in practice fair trade snubs most partners from the South. Either in fact or in law, organisations in the South that are too weak to meet the fair trade requirements, individual, non-organised producers, organisations in the South that cannot find international buyers ... producers living in dictatorial lands, citizens of mean or high GDP countries ..., and anyone without adequate resources to produce and sell a product are excluded from this type of trade.

This privileged access is not necessarily about having more money than other producer organizations (Mutersbaugh

2002), but also about connectedness, a finding confirmed by Paul (2005) who notes that social capital can be considered as both a precondition to, and impact of, fair trade. More generally, the benefits of fair trade have been found to beget more benefits for existing fair trade groups (Raynolds et al. 2004) and in some cases, as in some Nicaraguan coffee producing regions, it has been reported that early entrants to fair trade control the market (Valkila and Nygren 2010; Weber 2007). Several authors (Le Mare 2008; Milford 2004; Raynolds et al. 2004) describe this as an equity-efficiency or democracy-efficiency dilemma, with Northern buyers wanting to ensure consistent and reliable quality (efficiency), which requires working with the same established producer organizations (inequity) and technical staff (non-democratic). Thus, fair trade organizations have been found to employ professional technical advisors and administrators (Bacon 2010a; Doppler and González 2007; Murray et al. 2006; Mutersbaugh 2002; Wright and Madrid 2007), which may therefore exclude organizations without the necessary financial or human resources. Arnould et al. (2009, p. 199) argue that fair trade has become established in areas where the population is “receptive” and where “other conditions that were desired by a fair-trade organization coalesced.”

The finding that Northern fair trade groups are driving fair trade relates to several authors’ findings that fair trade standards and initiatives are top-down, do not adequately incorporate local knowledge, and are at times even inappropriate in local contexts (Bacon 2010b; Dolan 2008; Elias and Carney 2007; Getz and Shreck 2006; Gonzalez and Nigh 2005; Hatanaka 2010; Lyon 2006, 2009; Moberg 2005; Moore 2010; Mutersbaugh 2002; Nelson and Pound 2009; Otero 2004; Renard 2005; Shreck 2005; Taylor 2002; Tulet 2010). In addition to being top-down, Lyon (2006, p. 378), working with coffee producers in Guatemala, notes that Northern idealized and romantic notions of coffee production result in “a rigid certification system whose requirements may appear irrational and excessive within a local agricultural system.” Similarly, external inspectors have been found to be “outsiders who are unfamiliar with local culture, history and politics; possess little local agricultural knowledge or expertise; and whose class and ethnic backgrounds differ from those of producers” (Lyon 2009, p. 236). There are examples, however, of local knowledge being incorporated into fair trade, as with the promotion of local inspectors in Venezuelan coffee organizations (Robins et al. 1999). This bottom-up approach has been described as a key to fair trade’s success (Le Mare 2008; McEwan and Bek 2009a; McMurtry 2009), as a means to resist mainstreaming (Nel et al. 2007), and as a way to strengthen and develop local structures based on self-determination (Cycon 2001).

In addition to privileging access for certain organizations, fair trade has also been found in some cases to be

limiting its impact to a certain group of “elite” individuals. According to Tallontire (2002, p. 16) a more accurate representation of fair trade may be that it “benefits small producers in poor countries as opposed to saying that fair trade benefits the poor *per se*.” Several authors (Arce 2009; Diaz Pedregal 2009; Dolan 2008, 2010; Getz and Shreck 2006; Gonzalez and Nigh 2005; Gómez Tovar et al. 2005; Lyon 2008; Lyon et al. 2010; McEwan and Bek 2009a, b; McMurtry 2009; Mutersbaugh 2002; Nelson et al. 2002; Pirotte et al. 2006; Smith 2007; Taylor 2002; Valkila and Nygren 2010; Weber 2007) have explicitly reported on and discussed the creation of divisions within communities between those with access to fair trade and those without. Land ownership has been found to be a key component of this exclusion (Dolan 2008; Nelson et al. 2002), as fair trade impacts and privileges do not extend to landless laborers. Other factors limiting individuals’ ability to participate in fair trade include language requirements, travel issues, cost, time and labor inputs, and high quality standards. In the case of tea, Dolan (2008, p. 312) writes “by ascribing moral considerability to certain identities (land owners, men, those with resources to mobilize community support), Fairtrade risks creating a privileged space, where only certain concerns are aired, legitimized, and addressed.” Through a gender lens, the risk of the selective sharing of concerns is particularly exclusionary as Lyon (2008) found that it is typically male voices that determine what information is shared. Only Murray et al. (2006) explicitly counter discussions of exclusion within fair trade, finding that fair trade organizations do effectively support new and young co-operative organizations.

Perhaps because of the need for existing resources, support, and infrastructure, the importance of NGOs and external donors in accessing and sustaining one’s involvement in fair trade initiatives has been found in several cases across various contexts (Bebbington 1997; Brown 1997; Chi 2002; Diaz Pedregal 2009; Doherty and Tranchell 2005; Doppler and González 2007; Elias and Carney 2007; Gonzalez and Nigh 2005; Linton 2008; Lyon 2007a; Neilson 2008; Nel et al. 2007; Oelofse et al. 2010; Otero 2004; Paul 2005; Raynolds et al. 2004; Utting-Chamorro 2005; Valkila and Nygren 2010; Weber 2007). In some, as in Kenyan tea production and Tanzanian beekeeping, NGO support is so strong and visible that producers consider fair trade to be a charitable aid endeavour rather than a trading one (Dolan 2010; Fisher 1997). This runs counter to the narrative espoused by FLO and other Northern fair trade groups who, in their jointly written charter of fair trade principles, state that “Fair Trade is not charity but a partnership for change and development through trade” (WFTO and FLO 2009, p. 8). Another aspect of NGO involvement in fair trade initiatives is the “honeypot effect” reported in several organizations (Bacon

2010a; Lyon 2007a; Macdonald 2007; Nelson and Pound 2009; Nelson et al. 2002; Pirotte et al. 2006; Udomkit and Winnett 2002; Wilson 2010), wherein the organizational strengthening that results from fair trade attracts further NGO investment and NGO projects, another example of the potential for fair trade to limit its benefits to certain organizations. The stronger producer organizations have also been found to leverage their influence to attract investment and projects from government and other groups or to lobby more generally for producers' interests (Le Mare 2008; Milford 2004; Nelson and Pound 2009; Robins et al. 1999). Although this may certainly benefit the producer organization, when it interacts with the exclusionary aspects of fair trade described above, it may also create "little islands of prosperity in an expansive sea of poverty" (Bassett 2010, p. 45), as in the cases of cotton production in Mali and Burkina Faso.

In addition to this type of exclusion through fair trade, several case studies have also found that beyond a few public goods supported by the social premium, the benefits accruing to producer organizations are not being distributed to the broader community (Bassett 2010; Brown 1997; Diaz Pedregal 2009; Giovannucci and Ponte 2005; Moseley 2008; Nelson and Pound 2009; Nelson et al. 2002; Parrish et al. 2005; Pirotte et al. 2006; Shreck 2002, 2005; Tallontire 2002; Utting-Chamorro 2005). In the case of certain coffee producing organizations in South America (Diaz Pedregal 2009), the co-operative purposefully does not extend its membership to less well established producers so as to maintain a higher quality product and maximize benefits.

Nevertheless, such claims have been countered by other authors who found that fair trade benefits are indeed "trickling down" and that by virtue of generating employment, attracting NGO projects, and supporting community development work, fair trade is impacting the broader community (Dolan 2008; Lyon 2007a, b; Macdonald 2007; Nel et al. 2007; Nelson and Pound 2009; Ruben et al. 2009). Interestingly, the question of re-distribution has generated some resentment amongst fair trade producers in one Kenyan organization (Dolan 2008) who question why their commitment and work is benefitting non-affiliated community members. Moving beyond the geographic community, several authors in various contexts discuss the involvement of producer organizations in broader movements, networks, and inter-co-operative collaborations as a crucial intangible benefit of fair and alternative trade systems that contributes to the broader distribution of benefits (Arce 2009; Bacon 2005; Bezaury 2007; Eshuis and Harmsen 2003; Fridell et al. 2008; Le Mare 2008; Lyon 2007a; McEwan and Bek 2009a; Murray et al. 2006; Mutersbaugh 2005; Méndez et al. 2010; Parrish et al. 2005; Pirotte et al. 2006; Raynolds 2008; Raynolds

et al. 2004; Tallontire 2000; Taylor 2002; Taylor et al. 2005; Torgerson 2010).

Conclusion

This scoping review was initiated with the intent of summarizing the diverse body of research exploring the social dimensions of fair and alternative trade so as to be able to develop and guide future evidence based research and action programs. We adopted a critical lens not to condemn or vilify fair trade, but rather to highlight best practices and challenges in different contexts with the objective of contributing to fair trade's true emancipatory potential. Briefly, our research questions were: (1) to what extent does the existing literature define, measure, and report on the diverse lived social dimensions of fair and alternative trade and (2) what is the extent and nature of research on programs, policies, and experiences of Southern producers linked to the social dimensions of fair and alternative trade?

Existing research does often address the social dimensions of fair trade and we believe that it offers several important insights that will contribute to the aforementioned emancipatory potential of fair trade. It is our hope that by using a scoping review methodology to present a wide variety of findings that may otherwise be regarded as passing remarks if viewed in isolation, we are providing a mirror for the fair trade community to use as it builds on experiences from around the world. This review noted several key findings, summarized below, that are novel in that we highlighted the frequency of their appearance in the research literature and their existence across contexts, be it coffee production in Nicaragua or cotton growing in Burkina Faso.

Our examination of gender in fair trade revealed a lack of disaggregated data in existing research, and, where data was disaggregated, high labor burdens for women in fair trade despite very low official participation (e.g., cooperative membership)—this caused predominantly by systemic inequities. We also found several targeted women's programs based out of producer organizations, though their impact and effectiveness is not clear. In the area of health, we found a wide array of health programs in producer organizations associated with fair trade and found that in many contexts, the desire for health and safety benefits is an important motivating factor for joining fair trade organizations. In addition, fair trade was found to impact health both by promoting good health and access to health services as well as by reducing risks of disease and injury. With regards to labor, we reported that many fair trade organizations are blind to the concerns of laborers and thus having little impact on workers due in part to

laborers being left out of fair trade standards. This is especially problematic because across multiple contexts, fair trade was found to require more labor than conventional production. We also found, however, that fair trade has the potential to create jobs in producer communities and can significantly alter or re-organize labor relations in certain contexts. Our exploration of equity issues revealed that fair trade may be privileging select organizations and individuals in producer communities, may be being imposed in a top-down way that is not appropriate to local contexts, and may not be having the trickle-down effect that is often assumed. We also found here that NGO involvement plays a crucial role in determining the impact of fair trade and that fair trade producer organizations are being connected to broader regional and global movements.

A single theme that unifies a number of these findings is that there are important inequities in the access to and impact of fair trade that are being reported and experienced along several social dimensions. While these inequities may be noted as a passing finding in various research studies, when taken together—as they are in this review—they present an important challenge to the fair trade community.

We wish to conclude by highlighting five points that ran through the four thematic foci of the review and offer important insights for future research and action. First, if the fair trade knowledge base is to grow, if fair trade itself is to evolve, and if the people involved are to have the information required to act with greater intentionality, researchers must conduct rigorous research and must fully report their methodological choices. This scoping review revealed that nearly one-third (31 %) of articles and reports could not reliably be categorized as qualitative or quantitative. Fair and alternative trade systems will be unable to move forward in an evidence-based manner if it is not clear how research has been conducted and how data has been gathered. We suggest that researchers be more transparent in their methods, that rigorous studies be highlighted, and that methodologically weak studies be used only cautiously and transparently in policy and program decisions.

Second, though it was not the focus of the review, land tenure permeated discussions of gender equity, inclusion and exclusion from fair trade, and labor relations. Land tenure appears to play an important role in determining who benefits from fair trade and in what way those benefits are experienced, but there is a lack of focused research and action exploring the idea. Because of the way that land tenure intersected with various concepts in this review, we argue that more information is needed to understand two potentially actionable areas: access to land and access to fair trade benefits. Based on the findings of this review, promoting more equitable access to land may contribute significantly to the emancipatory potential of fair trade,

especially for historically marginalized groups. Land ownership and re-distribution may be beyond the scope of fair trade in most contexts, however, in which case it becomes vital to explore how to ensure equitable access to fair trade and its benefits regardless of land tenure, which may include innovative models of distributing social premiums or stronger considerations regarding labor.

Third, our review suggests that a limited descriptive language may be contributing to the silencing of important marginalized voices. In explicitly searching for impacts of fair trade on gender and labor—and thereby searching for terms highlighting the experiences of marginalized groups—we came across a dominant language of “producers” and “co-operatives” that implies a harmonious homogeneity that conceals the different experiences within fair trade and limits learning potential. Researchers should be more explicit in differentiating, for example, between men and women, co-operatives and plantations, land owners and landless workers, large agribusiness and small farms, professional staff and co-operative members, voting and non-voting members, etc.

Further, the concept of the “co-operative” seems to have an assumed meaning in the fair trade literature, leading to confusion. As noted, the original intent of the review to focus on agricultural co-operatives was rendered difficult by language that by its nature equated 30 member co-operatives with co-operatives involving hundreds of members and, in some cases, co-operative unions. Though many studies provide basic demographic information for the co-operative, the varied experiences of different types of producer organizations are not clear. This is not to say that there is an “ideal type” of producer and organization that researchers should try to identify; rather, this is an argument in favor of documenting the richness of varied experiences within fair and alternative trade.

Fourth, it is important to examine more critically the role of “outsiders” in fair trade producer communities, including NGOs, activists, certifiers, government, academics, and others. It is evident that the support of certain external groups has been vital to accessing and benefiting from fair trade in a variety of areas and that certain producer organizations survive because of ongoing external support. What is largely missing from the literature examined above is a critical exploration of the potential for a new dependency, the origin of ideas and policies, and the link between fair trade and self-determination and empowerment.

Finally, one of the most obvious findings from this review is that one cannot universalize a single set of experiences or structures of fair trade. Fair trade is characterized by a wide spectrum of rich and diverse stories and each case must be contextualized within the history and lived experiences of a specific community.

We would argue that if the above five conclusions are kept in mind when conducting future research, we will be better positioned to obtain a holistic understanding of the factors and practices that contribute to the observed outcomes in relation to the social dimensions of fair and alternative trade networks and move forward towards the just, liberated, and emancipatory worldview espoused by fair trade organizations and supporters.

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Author Biographies

Vincent Terstappen, MSc worked with a grassroots feminist organization in Nicaragua to complete his graduate thesis, "A case study of gender, health, and fair trade in Nicaragua" in 2010 as a student of the Department of Community Health and Epidemiology, University of Saskatchewan. His research interests include the social determinants of health and the promotion of gender equity in actions toward health and social justice. Terstappen has published articles in *Development in Practice* and the *Journal of Agromedicine*. He is currently working as a project coordinator for a community-based organization that offers social and environmental justice education to youth in Vancouver, British Columbia, Canada.

Lori Hanson, PhD is an Associate Professor in Community Health and Epidemiology at the University of Saskatchewan. She teaches and conducts research in global health, focusing on social determinants of health and actions toward health equity, as well as sexual and reproductive health rights. Her fair trade research has primarily involved Nicaraguan feminist movement actors and co-operatives, and has led to publications in *Development in Practice* and the *Journal of Agromedicine*.

Darrell McLaughlin, PhD is an Associate Professor of Sociology at St. Thomas More College, University of Saskatchewan. He comes from a background in farming and farm activism. His primary publication and research interests are the social relations surrounding sustainable agriculture and globalization, social justice, and food sovereignty. He is the author of *Differing Developments of Organic Agriculture in Canada and Sweden: Experiences of Farmers Themselves*, published in 2008, and co-editor of *Our Boards Our Business: Why Farmers Support the Canadian Wheat Board*, published in 2007.