



Fairtrade UK in Retrospect: From the Niche Genesis to the Revelatory Mainstreaming Marketing Strategy Era (Late 1950s - Late 2000s)

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ABSTRACT

This paper critically and systematically examines the discourse surrounding the history of fairtrade development, stakeholder involvement and the implications of mainstreaming marketing strategy on consumer engagement in the UK from the late 1950s to the early 2010s. It highlights the pioneering role of Oxfam and Traidcraft in the late 1950s; presents a novel structure of the fairtrade industry and highlights the UK fairtrade industry's market leadership and the benefits of mainstreaming. It also espouses the implications of mainstreaming strategy on consumer engagement and the long-term marketing viability of the industry in the UK.

Keywords: Fairtrade UK Industry, Mainstreaming, Consumer Engagement

JEL Classifications: M30, M31, Q01

1. INTRODUCTION

The fairtrade market in the UK has witnessed phenomenal growth over the past two decades (Nicholls and Opal, 2005 and Doherty et al., 2013). Indeed, the range and distribution of fairtrade products across Britain have increased significantly and many established brands have adopted the fairtrade label because of mainstreaming of fairtrade products into supermarkets (Nicholls and Opal, 2005; Fairtrade Foundation UK 2006-2010 and Davies 2007). Interplay of factors such as widened stakeholder participation, increased fairtrade awareness and mainstreaming has influenced fairtrade market growth (Doherty et al., 2013) and these factors invariably will continue to play critical role for the medium to the long-term sustainability of the fairtrade industry.

Existing studies have engaged with multidisciplinary and international perspectives of the fairtrade discourse towards securing the future of such an important movement to deliver

social change (Nicholls and Opal, 2005; Doherty et al., 2013). Notwithstanding such detailed discourse at a global level, there has been no exclusive systematic investigation of the structural development, stakeholder involvement, market development dynamics and the impact of expanded retail industry players on consumer engagement and values in the mainstream environment of supermarkets in the UK. This is the gap this paper seeks to fill.

The paper begins with an overview of the FairtradeMark and concept. This is followed by a historical review of the UK fairtrade market development with special emphasis on fairtrade industry structure and its key players. The next section covers a critical review and analysis of the evolution of fairtrade UK market in terms of growth trends and marketing strategy, particularly mainstreaming. The paper finishes by discussing the implications of mainstreaming strategy on consumer engagement and values, and what such developments mean for the future of fairtrade industry in the UK.

2. BACKGROUND LITERATURE

2.1. The Fairtrademark and Concept

The fairtrade concept has been explained differently by various industry players but common descriptors run through them all. Whilst some have placed emphasis on what it is and what it seeks to do, others have focused on its goals, nature and how it differs from other credence attributes. According to Nicholls and Opal (2008), fairtrade is a consumer-driven consumption and it is not about charity or not-for-profit. Rather, fairtrade represents a redefinition of profitable transactions encompassing and empowering all key stakeholders and, therefore, offers a range of benefits unavailable from traditional business models.

In the view the Fairtrade Foundation (FtF) UK, fairtrade is about better prices, decent working conditions, local sustainability, and fair terms of trade for farmers and workers in the developing world. Hence, by asking companies to pay sustainable prices, fairtrade solves the problem of injustices of conventional trade, which negatively affects the poorest and weakest producers in developing countries (Fairtrade Foundation, 2011). From a process perspective (Strong, 1996), described fairtrade as an approach to buyer-supplier interaction that targets mutually beneficial exchange by factoring into the transaction the power differences between developed and under-developed countries. Ultimately, fairtrade aims to maximise returns to the supplier than the margin of the buyer, within an agreed developmental structure (Nicholls, 2002).

As an alternative approach to conventional international trade, where a trading partnership focuses on sustainable development for the disadvantaged producer (Traidcraft, 2008), its objective is to ensure that producers receive a price which reflects an adequate return on their skill, labour and resources, and a share of the total profit commensurate with their input. The alternative approach is a cardinal principle of the fairtrade concept because it seeks to provide an alternative system of trading that contributes to improving the general wellbeing of the producer and subsequently supports sustainable development goals.

Golding and Peattite (2005) confirmed the potential of fairtrade principles to harness the opportunity for agricultural commodities to significantly contribute to the goals and objectives of sustainable development. This has long been the position taken by many fairtrade commentators and researchers who believe that such potential can be realised if fairtrade stakeholders adopt a combination of commercial and social marketing orientation (Davies, 2007; Doherty, 2013). This approach, termed “blending process,” represented a new relationship between social marketing and commercial marketing to ensure that fairtrade products have both social and commercial features to varying proportions and degrees. Generally, fairtrade is seen as a viable alternative means of directing developing countries towards achieving sustainability rather than following the unsustainable Western model in order to escape “the commodity trap” terminology of fairtrade activists (Strong, 1997).

The FairtradeMark is a certification label that informs shoppers that their fairtrade purchases at a premium price ensures that

commodity producers receive a fair and guaranteed price for their produce and ultimately promote their livelihoods and environmental sustainability.

Fairtrade differs from ethical trade in the sense that it is a development oriented and product specific partnership approach to buyer-supplier transaction that aspires to ensure equity of exchange (Bird and Hughes, 1997, Tallontire, 2000; Strong, 1996). On the other hand, ethical trade is an issue related to corporate policy which is primarily captured by corporate social responsibility (Nicholls, 2002). Fairtrade operationally is defined by ten key practices according to the Network of Fairtrade stakeholders (FINE), namely:

- Agreed minimum prices, usually set ahead of market minimums;
- Focus on development and technical assistance via payment-agreed premium;
- Transparent and long-term trading partnerships;
- Co-operative, not competitive, dealings;
- Provision of credit when required;
- Provision of market information to producers;
- Farmers and workers are organised democratically;
- Sustainable production is practiced; and
- No labour abuses occurred during the production process.

FINE is a network of key fairtrade stakeholders, made up of Fairtrade Labelling Organizations (FLO International), International Federation for Alternative Trade (IFAT), Network of European World Shops, and European Fairtrade Association summarise the fairtrade concept and their key activities as: “A trading partnership, based on dialogue, transparency and respect, which seeks greater equity in international trade. It contributes to sustainable development by offering better trading conditions to, and securing the rights of, marginalised producers and workers – especially in developing countries. Fairtrade organisations backed by consumers are engaged actively in supporting producers, awareness raising and in campaigning for changes in the rules and practice of conventional international trade” (FLO, 2010). According to FINE, the strategic intent of fairtrade is as follows:

- To deliberately cooperate with marginalised producers and workers in order to help them move from a position of vulnerability to security and economic self-sufficiency;
- To empower producers and workers as stakeholders in their own organisations;
- To actively play a wider role in the global arena to achieve greater equity in international trade.

2.2. The UK Fairtrade Market Development (Late 1950s – Post Mainstreaming Era)

The fairtrade idea can be traced to the late nineteenth century. It was a period characterised by the development of the co-operative movement resulting in the formation of co-operative organisations, owned and run by its members for their benefit in order to avoid the adverse effects of competitive capitalism emanating from the early nineteenth century industrialisation. One significant event at this point of history was the publication of ‘Max Havelaar’ in 1860 - a book that identified unfairness in the coffee trade between Indonesia and the Netherlands (Gould, 2003). The idea of fairtrade remained relatively inactive until the 1950s when it experienced

steady growth and expansion. The earliest traces of Fairtrade in Europe dates back to the late 1950s with Oxfam UK as a pioneer to who sold crafts made by Chinese refugees in Oxfam shops. In 1964 Oxfam created the first Fairtrade Organisation in the UK.

It is also worth noting that the operational word at the beginning was not “fair” as it is today, but “alternative” trade. Carol Wills of the International Federation of Alternative Trade (IFAT) noted that the word alternative was suitable because the core principle was to provide an alternative way of trading in terms of distribution channels and work force (Nicholls and Opal, 2005). However, it was later found out that the word alternative was unpopular in many countries and gained negative associations. Starting with the formation of the FtF in the 1990s, “fairtrade” has gradually replaced “alternative trade” tag.

The genesis of fairtrade market development can be traced to the “goodwill selling” era, which was spearheaded by Alternative Trade Organisations (ATOs) such as Oxfam and Traidcraft. ATOs are non-governmental organisations or businesses that are often political or religious based and aligned to fairtrade. During this period, the ATOs facilitated the establishment of direct trading links that helped producers in developing countries to gain access to developed markets of Western Europe and North America (Fairtrade Foundation, 2003). This period of market development was characterized by marketing products on the basis of social solidarity. Similarly, other fairtrade commentators termed this period of development as the “solidarity era” between 1970 and 1990, where handicraft was the main fairtrade product sold. Sales transactions were in the form of mail order (Traidcraft) and in-shop purchases (Charities - Oxfam, or Specialist Alternative Trading Organisations [ATOs]). Stakeholders worked primarily to connect grower communities and handicraft makers directly with consumers. The operational model was to meet producer rather than consumer need. Guarantee of fairtrade was solely based on the credibility of the trading organisation.

The next stage of fairtrade market development is the commercialisation phase, which began in 1988 and involved marketing fairtrade labelled products such as coffee. Consumers were able to access fairtrade products from traditional outlets like ATOs as well as the mainstream retailers in agro-food marketing. The significant change from the previous era was the review of the production chains of products entering fairtrade shops by both British Association for Fair Trade Shops and Suppliers (BAFTS) and The IFAT. These organisations ensured information flow between producers and retailers. They also developed guidelines for prospective members joining them. Assurance of fair trading could only be inferred from the name of the ATO involved. On the commodity front, national fairtrade initiatives began. The FtF UK as an independent non-profit organisation was established in 1992 by CAFOD, Christian Aid, Oxfam, Traidcraft, the World Development Movement, and the National Federation of Women’s Institutes to license the use of the Fairtrade Mark on products in the UK in accordance with internationally agreed Fairtrade standards (Fairtrade Foundation, 2012). This shift culminated in the formation of the Fairtrade Labelling Organisation (FLO) to audit, accredit and label using a jointly agreed set of fairtrade guidelines (FLO, 2010).

The main feature of this era was the “emergence” of fairtrade branders such as Sainsbury’s, Tesco and Nestle, among others. Granting these supermarkets, food processors and multinationals licenses to carry the fairtrade label was a major step away from the initial principles of fairtrade authorities (Davies, 2007; Nicholls, 2010), which sought to work primarily with ATOs such as Cafédirect, Equal Exchange Trading, Traidcraft, Oxfam, Twin Trading and Divine Chocolate (Davies, 2007). This is due to the fact the fairtrade authorities do not control these multinationals and there was some stakeholder suspicion of large supermarkets’ long-term interest in the development of fairtrade.

Other licensing schemes that have been developed within this era include “original own labellers” such as The Day Chocolate Company in the UK (Davies, 2007), acting as the middleman and redirecting its existing suppliers to adopt fairtrade principles (Smith, 2006). Some organisations have been allowed to carry the fairtrade mark by buying a given quantity of fairtrade products already on the market.

The next phase of fairtrade market development after the “New Initiatives” stage was a period characterised by cooperation among stakeholders dealing with both fairtrade and own-labelled products (Nichols and Opal, 2008). Key market development indicators include businesses sourcing and managing fairtrade transactions independent of ATOs, and involving major retailers such as Tesco, Sainsbury’s and the Cooperative Group (Karjalainen and Moxham, 2013). This development was a strategic shift from niche marketing to mass marketing of fairtrade products known as a mainstreaming strategy (Doherty et al., 2013). The main reason for the fairtrade industry to pursue a mainstreaming strategy was to achieve rapid growth in market share by placing fairtrade products in conventional markets.

Fairtrade market development revolves around stakeholders including Producers, Fairtrade authorities, Importers and Suppliers, Manufacturers, Fairtrade ATOs, Fairtrade companies/manufacturers, wholesaler suppliers, Fairtrade adopters, Fairtrade branders, Fairtrade producers and Fairtrade shoppers/consumers. All these players have their particular motivation for their involvement in Fairtrade marketing. Currently, Fairtrade UK is represented nationally by the FtF, UK; whose members as at June 2014 has been expanded from the four founding members to include: Banana Link, Methodist Relief and Development Fund, National Campaigner Committee, Nicaragua Solidarity Campaign, People and Planet, Scottish Catholic International Aid Fund, Shared Interest Foundation, Soroptimist International, Tearfund and Commitment to Life/United Reformed Church (Fairtrade Foundation, UK, 2014). Under the auspices of FtF UK significant milestones have been achieved.

3. UK FAIRTRADE INDUSTRY STRUCTURE AND KEY PLAYERS

The development of the fairtrade industry has been accompanied by structural changes to the fairtrade system to accommodate

growth in the market and the entry of new stakeholders. At the onset of the fairtrade concept, an initial simple structure was developed by ATOs and Charities, such as Oxfam, to facilitate the direct connection between commodity producers in developing countries and consumers in the UK.

Over the last two decades, the simple structure has evolved into a complex network of stakeholders playing different roles across the fairtrade supply chain in the UK. The most significant change to the structure and roles of key players has been the entry of larger and traditional mainstream companies into the fairtrade market (Moxham, 2012). Despite the existence of a general umbrella fairtrade structure, individual products have their structural peculiarities, as a result of their different supply chains and participants.

The fairtrade industry structure has developed as a result of the changing scope and nature of activities carried out by the various stakeholders (Davies, 2007, Doherty et al., 2013, Nicholls and Opal, 2005) involved in the production, manufacturing, distribution, retailing, certification, campaigning, purchasing and consumption of fairtrade products. As such, fairtrade stakeholders encompass Producers, Importers, Manufacturers, Wholesalers, Distributors, Retailers and shopper/consumers. Figure 1 shows a

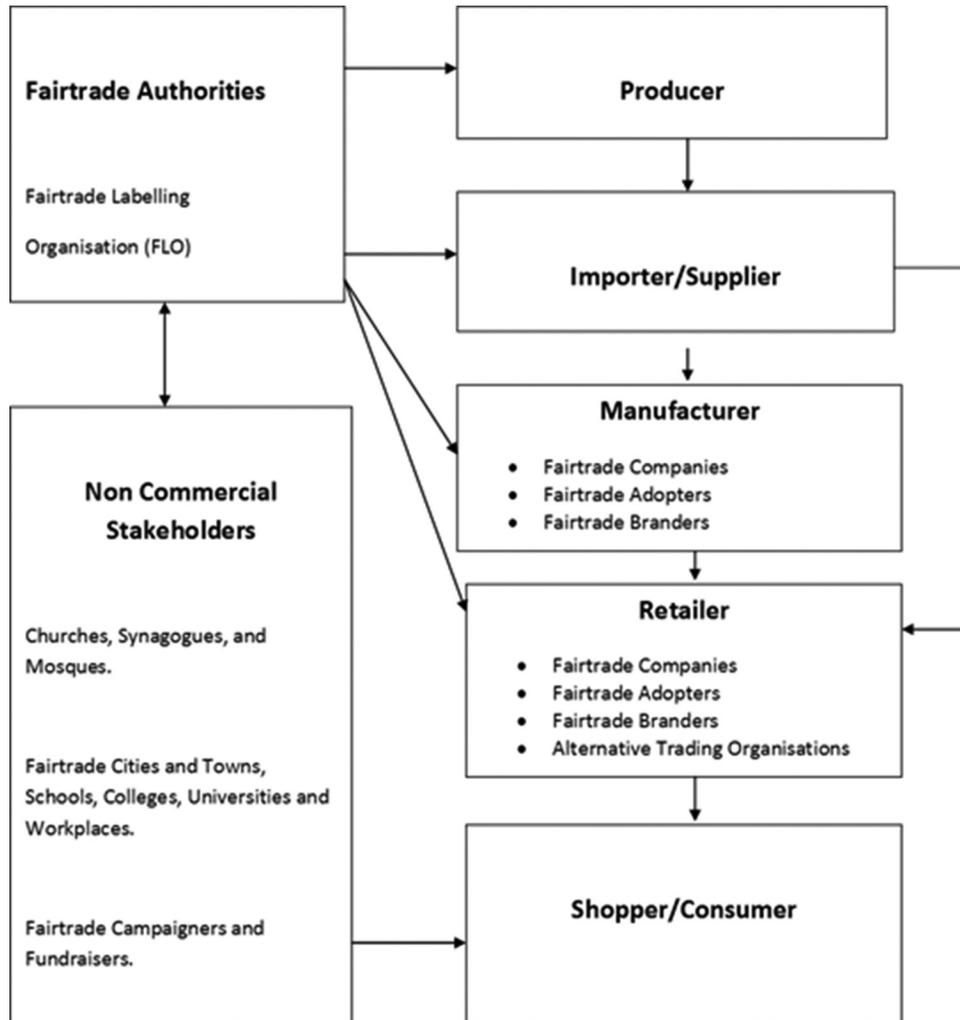
diagrammatic representation of a general structure of the Fairtrade Industry in the UK post mainstreaming era.

3.1. Fairtrade Authorities

One key player in the fairtrade industry is the Fairtrade Authorities, comprising the FtF, FLO, and the IFAT. They are responsible for supervising, auditing and granting licenses for certification marks to relevant organisations (FLO, 2010, Davies, 2007). Unlike the other fairtrade stakeholders, these organisations do not trade in fairtrade products.

The FLO has, since its formation in 1997, played a key role in fairtrade certification. The entire process of fairtrade certification is internationally coordinated by FLOs International. The work done by this important fairtrade stakeholder leads to the award of a fairtrade mark under the authority of one of its labelling members FLO. FtF UK has a full membership status. FLO is a non-profit, multi-stakeholder association involving 23 member organisations and still being added on, which develops and reviews Fairtrade standards and provides support to Fairtrade Certified Producers by assisting them in gaining and maintaining Fairtrade certification and capitalising on market opportunities (FLO, 2010). The stakeholders forming the FLO are either Labelling Agency or Producer Network.

Figure 1: A generalised structure of the fairtrade industry in the UK



The actual certification is done by an independent international certification company called FLO-CERT GMBH. This company is responsible for the inspection and certification of producer organisations and traders against the fairtrade standards. There were 746 certified Fairtrade producers worldwide by December 2012 (FLO, 2014). The fairtrade label is a “Certified™ label” which guarantees that the product (s) carrying the label have been certified against internationally agreed fairtrade standards. Prior to the fairtrade certification label, consumer guarantee of fairtrade products was associated with the selling location of fairtrade products (Nicholls and Opal, 2005). Notable examples were places such as the charity shops in the UK (Davies, 2007) before the establishment of the FtF UK in 1992 to be an independent auditor for fairtrade standards for selected fairtrade products. There was a gradual shift to include the credibility of the ATO involved in the fairtrade transaction seen in the niche-market era of 1990 – 2002 (Nicholls and Opal, 2005, Davies, 2007).

The FtF UK refers to its Fairtrade Mark as “an independent consumer label which appears on UK products as a guarantee that they have been certified against internationally agreed Fairtrade standards.” It shares internationally recognised fairtrade standards with initiatives in 20 other countries, working together globally with producer networks as FLOs International. The Fairtrade mark indicates that the product has been certified to give a better deal to the producers involved – it does not act as an endorsement of an entire company’s business practices (Wielechowski and Roman, 2012, Fairtrade Foundation, 2014). The FtF UK has reported many milestones over two decades of operations which confirm s their key marketing achievements.

The marketing milestones includes series of announcements by retailers players converting existing brands to fairtrade or switching own label products to fairtrade. Fairtrade industry reports (Globescan, 2009; Fairtrade Foundation, 2013) and earlier fairtrade studies (Nicholls and Opal, 2005, Davies 2007) have described the growth in fairtrade sales motivated by these announcements to a market-driven ethical consumption. However, in management of organisational behaviour terms this trend could be associated with operationalising of Herzberg’s hygiene factor theory, where fairtrade is seen by supermarkets as a necessity to stay competitive. Therefore, ones a competitor adopts fairtrade its counterparts for strategic reasons have no option than to do likewise. Indeed, the level of commitment of mainstream fairtrade actors have been highlighted as an area that require thorough investigation (see Doherty et al., 2013; Nicholls, 2002; The Daily Telegraph, 2002; The Observer, 2006; Davies, 2007 and Nicholls and Opal, 2005).

Another inference that can be drawn from the literature and industry reports is that mainstreaming fairtrade via branded products in supermarkets has attracted more people to buy fairtrade products and not necessarily more people concerned about fairtrade to buy more. It is most likely that there are more people buying branded fairtrade products rather than more ethically-driven shoppers buying fairtrade labelled products.

3.2. Non Commercial Fairtrade Stakeholders

Playing a key role in raising fairtrade awareness and advocacy are faith groups (Churches, Synagogues, and Mosques), Fairtrade

cities and towns, schools, colleges, universities and workplaces, and Fairtrade campaigners and fundraisers (Fairtrade Foundation, UK, 2010). Faith groups like churches agree to follow certain practices including using fairtrade products after church services and meetings. Upon completion of an application, a certificate is issued to confirm a fairtrade church status. A commitment on the part of a corporation, government institution, town, city, and county, or borough to support fairtrade and use fairtrade products leads to conferring of fairtrade status. The same procedure and principle applies to schools, colleges and universities. There were over seventy (70) Fairtrade universities and colleges in the UK and this has more than doubled over 5 years to 160 (Fairtrade Foundation, 2014). Oxford Brookes University is on record as the premier fairtrade university in the UK (Fairtrade Foundation, 2009).

One area suffering from under reporting by the FtF UK is the retail sales accruing to non-commercial stakeholders. In view of this omission, all fairtrade sales are attributed to the UK consumer. It is however obvious that many people who are non-fairtrade shoppers consume fairtrade products at work and at social gatherings because of institutional adoption of the fairtrade status, making fairtrade consumption apolitical and a passive activity (Doherty et al., 2013). Such lack of reporting does mask greater clarity and transparency on the part of the FtF UK, about the degree to which fairtrade purchases are consumer ethics driven as opposed to a widespread adoption of fairtrade status by non-commercial stakeholders.

Fairtrade campaigners have, over the years, worked to create awareness by challenging trade rules that are seen as a contributory factor to poverty for producers in developing countries (Jaffee, 2010; Golding and Peattie, 2005; Davies, 2007). Some groups and individuals donate directly or sponsor fairtrade activities to raise funds for the work of the FtF, UK. An example of such contribution to the FtF was the UK Government’s £12 million support over the 4 years since 2009 in funding to Fairtrade and its international partners in the FLOs International in order to advance its work supporting farmers in developing countries to access better terms of trade in international markets.

3.3. Fairtrade Food and Commodity Producers

Producers of agricultural food and commodities in developing countries are at the centre of the fairtrade trading system. As at September 2009 twenty-three fairtrade commodity producing countries supplied the UK fairtrade market. This number has since increased to 63 producer countries mostly located in the global south who buy from 697 farmer groups as per the 2012/2013 annual report (Fairtrade Foundation, 2013). The current number represents over 200% increase in producer countries involved in fairtrade over a period of 5 years.

Fairtrade commodity producers are normally grouped into producer cooperatives (Fairtrade Certified Producer Groups) to coordinate and consolidate members’ production and post-harvest activities. These producer networks liaise with fairtrade authorities and other trade partners to ensure compliance of fairtrade standards, payment of the fairtrade premiums and information dissemination

(FLO, 2010, Fairtrade Foundation, 2014). After certification, producer cooperatives are listed on the fairtrade product register to enable registered companies to buy from them under the terms and conditions of fairtrade authorities (FLO, 2009).

All the key operational practices of fairtrade are potential motivational factors for fairtrade producers in developing countries to engage in fairtrade marketing. However, Oxford Policy Management (2000) identified five key attractions of fairtrade to producers, namely:

- Direct relationship between producer and the buyer;
- Support against price fluctuation;
- Payment of premium price as well as social premium;
- Pre-financing facility;
- Information provision on design, standards and prices.

Moore (2004) indicates that access to markets in the developed countries in Western Europe and North America offered by fairtrade is the most important factor that attracts producers in developing countries to participate in fairtrade. This is followed by the pricing system in the order of importance under the fairtrade model. The argument that commodity producers in developing countries have stronger commitment to the market benefits of fairtrade than the developmental elements has also been reported.

A case in point is when coffee producers in Tanzania had problems with Café direct as a result of the producer network's "weak" commitment to developmental standards (Tallontire, 2000). It is, however, believed that fairtrade producers in developing countries find the fairtrade principles very attractive. On the other hand, fairtrade authorities depend hugely on the continuous interest of fairtrade producers in the developing countries in the fairtrade concept as a key evidence of success. By the year 2008, more than 1.5 million producers and workers in 58 developing countries were involved in fairtrade transactions with their counterparts in Europe, North America and Japan (Fairtrade Foundation, 2008).

3.4. Importer/Supplier

Certified fairtrade importers/suppliers based in the UK serve as an important link between fairtrade certified producer groups in developing countries of Africa, Asia, Caribbean and Latin America and fairtrade manufacturers in the UK (Davies, 2007; Fairtrade Foundation, 2009). Fairtrade importers/suppliers buy commodities, and fresh fruits and dried fruits from producer cooperatives on fairtrade terms and conditions to supply manufacturers in the UK who are predominantly fairtrade companies. Some suppliers, however, sell unbranded fairtrade certified fresh and dried fruits directly to the retail market.

The BAFTS was established 1995 by Aileen Garden, then Manageress of Gateway World Shop, Durham to provide a forum for fair trade shops and suppliers to share ideas and best practices. BAFTS has a membership of over seventy-eight suppliers/importers as at December 2013 and work through Fairtrade retailing and campaigning to promote social justice for commodity producers in developing countries.

3.5. Fairtrade Manufacturers

Fairtrade manufacturers play a key role by processing fairtrade commodities into fairtrade products for the retail market in the UK. For example, the cocoa beans produced by producer cooperatives in Ghana are processed into cocoa products such as chocolates by fairtrade manufacturers (Nicholls and Opal, 2005). From the point of view of the fairtrade industry, fairtrade manufacturers are categorised into fairtrade companies, fairtrade adopters and fairtrade branders (Davies, 2007). Some of the fairtrade manufacturers import their commodities directly from producer cooperatives in developing countries.

Fairtrade companies undertake processing and marketing of fairtrade products for profit. Some well known fairtrade companies are Café direct, Day, Equal Exchange and Traidcraft. These companies are ATOs as well but do differ because they are set to achieve specific commercial and ideological targets. The commercial purpose is to maximise profit and the ideological objective is to foster relationships with fairtrade licensed producers towards improved livelihoods and also to bring about change in the prevailing market system. Many fairtrade companies have retail outlets for fairtrade products. Divine, for example, sells fairtrade drinking chocolates, cocoa powder and chocolate bars via Divine online chocolate shop. Fairtrade companies differ from fairtrade adopters because they deal exclusively in fairtrade products whilst the adopters offer other products with credence attributes such as organic products.

Typical fairtrade adopters are Green and Blacks, and Clipper and Percol. They are involved in the marketing of ethical products including fairtrade. These organisations are well known for marketing organic products. However, since the emergence of fairtrade consumerism, they have adopted the fairtrade concept and are actively participating in fairtrade marketing. It appears participating in fairtrade is a natural progression towards expanding their portfolio of products. Both organic and fairtrade products have credence attributes, and this makes adopting fairtrade very attractive because they are able to market fairtrade products without making significant changes to their operational philosophy and marketing strategies.

The fairtrade branders are major players behind the mass marketing of fairtrade products in Europe, North America and Japan. These are traditional food industry players such as Sainsbury's, Fyffes, Tesco and Nestlé (Davies, 2007), Costa Coffee, Starbuck, Sara Leeare (Nicholls and Opal, 2005), and Cadbury. These companies have engaged in the marketing of many non-fairtrade product lines for a long period but have decide to create own label fairtrade products to participate in the growing fairtrade industry. The earlier hesitation on the part of these major players in the agro-food market to adopt fairtrade created a level of suspicion when they decided to get involved. Consequently, researchers (Doherty and Trachell, 2007; Doherty et al., 2013), and other stakeholders questioned their commitment towards the long term sustainability of the fairtrade principles (Nicholls, 2002; The Daily Telegraph, 2002; The Observer, 2006; Davies, 2007 and Nicholls and Opal, 2005).

The major difference between fairtrade branders and adopters is that the former offer a variety of fairtrade and non-fairtrade products and the later offer exclusively products with credence attributes including fairtrade. The manner in which fairtrade branders and adopters have been distinguished suggests that the fairtrade industry is still production orientated. In view that, its infrastructure is built largely from a supplier perspective and not with the view to find out what shoppers/consumers want to subsequently deliver more. The difference between fairtrade branders and adopters communicates exclusively to suppliers and not consumers.

3.6. Retailers Offering Fairtrade Products

The fairtrade retail market is serviced by the retail outlets of fairtrade companies, fairtrade adopters, fairtrade branders, and ATOs and independent retailers. Apart from fairtrade companies that are exclusively involved with fairtrade marketing, all other retailers offer either additional credence product (s) or a variety of non-fairtrade products. ATOs are a unique group of fairtrade retailers because they are not-for-profit organisations whose aim is to better the working and living standards of fairtrade producers at the community level.

A key platform used in their work is awareness creation about pervasive poverty across the developing world. Examples of such organisations are Oxfam, World Development Movement and Twin Trading.

3.7. The Fairtrade Shopper/Consumer

In addition to the other stakeholders, the fairtrade shopper or consumer is another key player and the driving force behind the growth in fairtrade food product marketing. The traditional fairtrade consumer in the UK was viewed as the AB1 consumer segment in the UK. According to Moore (2004), the people most willing to pay a premium between 10 and 18% for fairtrade products were women of the AB1 consumer group. A survey commissioned by FtF in the UK reported that the “AB1” consumer segment which is characterised with a high level of education and affluence was most likely to buy fairtrade products (Fairtrade Foundation/MORI, 2004).

A contrasting observation was reported by Nicholls and Opal (2008) that there is an emerging fairtrade consumer segment among younger age groups. Wright and Heaton (2006) also reported that UK consumers drawn from ABC1 group were the least associated with interest in fairtrade products. These findings contradict most of the survey reports commissioned by the FtF UK and other interested agencies in the UK. The evidence above highlights a challenge to clearly work out who buys fairtrade food products. In the niche marketing era, it was very easy to find out who actually buys fairtrade food products because they were churchgoers which, on average, would be an older person.

Despite adopting a mass-marketing approach, the fairtrade industry seems to assume that it is the same people who used to buy at church that are buying at supermarkets. But it could be that placing fairtrade products in supermarkets has resulted in the introduction of new demographic segments that are not being

treated any differently, because of the assumption that they are buying fairtrade products for the same reason as the people who bought at Oxfam shops and the church.

4. FAIRTRADE BRITAIN – A GLOBAL MARKET LEADER

The fairtrade market has grown exponentially across Europe, North America and Japan over the past decade (Nicholls and Opal, 2005). The global retail sales of fairtrade certified products exceeded 2.3 billion Euros (£1.6 billion) in 2007. The growth is accounted for by both increased market size and the introduction of new fairtrade products into existing and new markets (Fairtrade Labelling Organisation, 2008). The UK has been a major market for fairtrade products over the past three decades. France, Germany and Switzerland are the other key fairtrade markets in Western Europe; they all recorded over €150,000,000 retail sales in 2008. Canada and USA are the most significant markets outside Western Europe. Fairtrade global annual report 2008-2009 indicates that “no markets fell back” despite the impact of the global recession. But out of 19 countries recorded reduced growth rate and this includes France, Switzerland, the UK and the USA. Global retail sales for fairtrade products have achieved steady growth over the past decade. However, there are signals that growth is slowing in key fairtrade markets.

4.1. UK Fairtrade Market Growth Trends

According to Davies (2007), the UK fairtrade market has seen significant growth in retail sales and the variety of fairtrade products on the market within the past two decades. The findings of the TNS CAPI OmniBus survey estimated retail sales in the UK increased by 72% between 2006 and 2007 (Fairtrade Foundation, 2006). The fairtrade industry in the UK achieved a further retail sales increase of 44.4 % over the 2007 value in 2008. Retail sales value of fairtrade foods in the UK increased by 2.39%, and sales volume declined by 2.27% between 2008 and 2009 (Dunnhumby, 2009).

Most of the leading supermarkets in the UK are marketing fairtrade products after adopting the fairtrade label. For example:

- Waitrose launched loose fairtrade certified bananas in 2007, a year after Sainsbury launched its 100% fairtrade banana;
- The co-op’s group switched own-label hot beverages to fairtrade in 2008;
- Tate and Lyle also converted their branded sugar to 100% fairtrade in 2008;
- Cadbury dairy milk committed to fairtrade in 2009;
- Starbucks espresso-based fairtrade coffee was launched in UK and Ireland in 2009;
- Ben and Jerry also launched its 4th fairtrade flavour in 2009; and
- Sainsbury converted its own-label roast and ground coffee to fairtrade in 2009.

From the very few fairtrade products on the market in the mid-1980s, there were over 300,000 fairtrade certified products on the UK market by October 2009 (Fairtrade Foundation, 2009).

According to TNS Worldpanel (2006), Tesco had a 26.7% share of the fairtrade market in the UK, followed by Sainsbury (22.6%), The Co-operatives (19.1%), Asda (10.9%), Waitrose (9.1%), Morrisons (6.5%) and Somerfield (3.0%). In view of these announcements by key players in the UK grocery industry and the cumulative retail sales increases over the past decade, there is a sense of optimism for continuing growth on the part of the fairtrade industry. However, detailed analysis of the supermarket shopper loyalty card data raises serious questions about the development of the UK market and opportunities for growth. Firstly, evidence beneath the headline figures shows that increasing retail sales growth is not consumer-demand driven based on actual fairtrade shopper data gleaned from Clubcard database. The analysis of the actual behaviour data from dunnhumby indicates that shoppers are spending more per visit because the average prices have gone up; fewer people are buying fairtrade food products; and distribution in terms of stores selling fairtrade food products has gone up (Dunnhumby, 2009).

The actual shopper data analysis for 52 weeks from 06 April, 2009 to 04 April, 2010 further suggests that the demand for fairtrade food products has not increased as envisaged there was not much shopping across the fairtrade food product categories (Dunnhumby, 2011). Despite any indication that increasing fairtrade retail sales growth is consumer-demand driven estimated retail sales value of Fairtrade products in the UK rose from £712 million in 2008 to reach £1.53 billion in 2012. This growth represents over two hundred and 5% over 4-year period. Such growth trends require a careful critical investigation to understand the key driver behind such phenomenal growth.

Although coffee, tea and bananas account for two-thirds of fairtrade food products retail sales, shoppers buying one of them do not buy any of the other two. Thus, people are selectively buying individual products and not a collection of them, as one would expect from shoppers motivated by a growing concern for disadvantaged commodity producers in under developed countries.

4.2. Key Drivers for Fairtrade Retail Sales

The fairtrade success story has featured predominantly the steady increase in consumer awareness among the public in the UK as the key factor driving retail sales value of fairtrade products (Fairtrade Foundation Reports, 2006; 2007; 2009). FtF UK's survey data released in June 2009 indicates increased awareness among UK consumers from 57% in 2007 to 70% by May 2008. Indeed, more recent industry report indicates that 89% of UK public trust the fairtrade mark (Fairtrade Foundation Annual Review (2012/2013). Estimated retail sales by country further show that the UK is still the market leader for fairtrade products recording over Euro 1.9 billion in the year 2012 (Fairtrade International Annual Report, 2012/2013). This is seen as a significant increase in the general public's claim of recognising and trusting the fairtrade mark. Earlier survey reported that 64% of the public in the UK connects the mark with "a better deal for producers in developing countries" (Fairtrade Foundation/TNS CAPI OmniBus, 2008). If the increasing sales value trend for fairtrade products is attributable to increased awareness among the UK population then, by extension, more people are becoming conscientious and ethically driven in their purchase behaviour.

By attributing increased retail sales to increased awareness as a result of sensitisation and promotional activities of fairtrade authorities and their non-commercial counterparts, the fairtrade authorities are suggesting that more UK consumers have understood and accepted the fairtrade concept and, as a result, altered their purchasing behaviour in favour of fairtrade products. Judging from the analysis of supermarket loyalty data adduced to earlier, it is not obvious that the growth being experienced by fairtrade retail sales is because of increased awareness and may, after all, be growing without any careful targeted marketing.

The Tesco Clubcard Loyalty data (dunnhumby) shopper data attributed fairtrade food retail sales value increases between 2007 and 2009 to average price increases (Dunnhumby, 2009). At a time when the fairtrade industry reports that 7 in 10 people in the UK recognise the fairtrade mark which has contributed to increased retail sales (Fairtrade Foundation Annual Review, 2008/2009), dunnhumby shopper data shows that <25% of shoppers purchased fairtrade food products between November 2008 and November 2009.

More recent figures based on the Clubcard analysis further (Dunnhumby, 2014) show that at the time when almost 9 in 10 people in the UK recognise and trust the fairtrade label <20% of shoppers purchased fairtrade products between May 2013 and May 2014. Indeed, what people say and what they do are different, hence this huge attitude – behaviour gap (Nicholls and Lee, 2010) which has rather worsened between 2008 and 2014. One key indicator that supports the growth in sales is the increased distribution of fairtrade across the UK (Dunnhumby, 2009; 2014). This confirms increased UK public recognition; awareness and vouching trust for the label does not always translate into purchase. Many studies have shown that consumers' positive attitudes towards sustainable products rarely translate into actual purchase behaviour (Gruber and Schlegelmilchwhen, 2014) and we argue that fairtrade is no exception.

This situation creates doubts about the general notion that consumers purchase fairtrade products because they care about disadvantaged food commodity farmers in developing countries. It could be that shoppers buy fairtrade food products to feel better for doing something "good" or just on impulse or accidental and not because of the respective environmental and ethical principles behind them.

Another possible reason for retail sales value growth is that fairtrade may be experiencing the "Tipping Point" effect; - a principle that espouses the belief that "simply by finding and reaching those few "special people" who hold so much social power in society, can shape the course of social epidemics" (Gladwell, 2001, pp. 259). The possible inference here is that fairtrade retail sales value is growing because fairtrade stakeholders have found and reached some special and powerful people in political leadership, academics, and religious and renowned media outlets with the fairtrade message. The message has subsequently captured the imagination, commitment and endorsement of this unique target group and this has induced a "tipping point effect," reflected in other people including many institutions buying fairtrade as a

result. There is a need to find a more reliable means of explaining what drives fairtrade food shopper purchasing behaviour since the awareness argument is not sustainable.

5. SHIFTING FROM NICHE MARKET TO MAINSTREAM: IMPLICATIONS FOR CONSUMER ENGAGEMENT

On the basis of the assertion that increasing retail sales value is a direct result of increased awareness, the fairtrade industry adopted and implemented a strategy of shifting from a niche market to mainstream (Fairtrade Foundation, 2009) about two decades ago. In terms of fairtrade sales of fairtrade products there is no doubt that mainstreaming strategy has been very successful (Karjalainen and Moxham, 2013; Yamoah et al., 2014).

In addition to retail sales benefits, adopting and implementing mainstreaming has significant benefits: (1) Increased fairtrade awareness among the general population, especially non-commercial stakeholders such as corporations, academic institutions and faith groups, (2) provision of a community for engagement by stakeholders (retailers, ATOs, FtF, BAFTS) to share ideas and best practices, (3) minimized the effect of real/perceived product availability barriers that was identified as a major challenge to shoppers (Nicholls and Opal, 2005, De Pelsmacker et al, 2005), (4) reinforced the need to promote social justice through fair and better prices, decent working conditions, local sustainability and ethical consumerism (Doherty et al., 2013).

This major strategic move raises interesting questions about fairtrade attracting new customers with diverse values relative to the ethical consumer values associated with the traditional fairtrade niche market segment. It has been a significant policy change and strategic shift intended to make fairtrade products more accessible to the general public. This shift implies that customers that used the traditional Oxfam and Church outlets can now buy their fairtrade food products from their regular supermarkets. In the light of this change, the industry could lose some of the people who used to buy from these traditional outlets in case they do not have easy access to a supermarket or their supermarket does not stock the specific fairtrade products they often buy. There is also the possibility of some traditional fairtrade customers withdrawing for feeling it is no longer a special feature to buy fairtrade products.

Another issue that could potentially jeopardise the future of fairtrade is the arousal of customer suspicion about the motives of large supermarkets getting involved with fairtrade marketing. Such sentiment has been expressed about the motives of Nestlé UK launching fairtrade coffee by Twin Trading - a fairtrade non-governmental organisation (Jones, 2005) and Divine, a UK-based fairtrade company (Doherty and Tranchell, 2007). In view of the points raised above, it is possible that the current mainstreaming strategy could have implications for shopper perception, loyalty, market growth and the long-term sustainability of the fairtrade industry. Mainstreaming of fairtrade products also means that people with diverse values are presently buying fairtrade products and not just the traditional churchgoers and Oxfam customers who

are noted for their concerns for the disadvantaged producers in developing countries.

As a result of mainstreaming, there is the likelihood that one will find less engagement on the part of fairtrade purchasers. The foregoing discussion highlights the importance of understanding the underlying values behind shopper behaviour towards fairtrade products, and not to continue assuming that educated affluent and traditional Oxfam customers are driving the market. The bad news, however, is that, even if these people were carrying on this behaviour, the dwindling church membership across Britain would mean that one cannot have enough of them to sustain fairtrade food as a mainstream product.

Major highlights of the mainstream strategy by the FtF, UK give room for further questioning of what other lasting benefits of mainstreaming in the medium to long term. For example, since Cadbury and Nescafe have adopted the fairtrade concept and use the fairtrade label on their products, shoppers will buy these products because they are both well-known brands with a loyal customer base. At present, Sainsbury shoppers can only buy fairtrade bananas since it switched to 100% fairtrade bananas in 2006. The Co-op's group, Tate and Lyle, and other key food industry players in the UK are involved with fairtrade marketing. The resultant increases in retail sale values points more to a wider distribution strategy than building a loyal consumer based on the principles of fairtrade.

It seems the fairtrade industry believes that about 90% of the general public in the UK are aware and will vouch for the credibility of the fairtrade mark. Therefore, everyone can buy fairtrade products. Hence, it is prudent to continue with the mass-marketing strategy (mainstreaming). The supermarket loyalty card (Dunnhumby) data shows that <1 in 5 people actually buy fairtrade products. Would it not be a better option for the fairtrade movement to try and find out those people who can afford to pay for what they care about and charge them more, rather than continuing mainstreaming and selling to everybody, adding to the market as many fairtrade products as possible, widening up the premium and raising prices?

Mohan (2010) has suggested the need for the fairtrade industry in the UK to set a boundary within which mainstream marketing strategy will operate without diluting its core its fundamental principles. Similarly, Doherty et al., (2013) highlighted the dwindling sales of ATOs as a result of the increasing presence of own label and big brands adopting fairtrade as well as questioning the commitments of supermarkets to fairtrade principles.

Behind this background of mainstreaming announcements and activities, could it also be that fairtrade products purchasing behaviour is synonymous to that of most organic customers who buy these products because they like them and not necessarily because they are organics? Mainstreaming strategy has widened shopper access to fairtrade products but does not appear to be building shopper interest and loyalty on the basis of fairtrade principles.

In a nutshell, the fairtrade movement would have us believe that the key driver to fairtrade retail sales growth is high levels of fairtrade awareness. The evidence just presented suggests there could be other major reasons for this growth, and it is more plausible that the growth is centred on distribution marketing and merchandising, and not fundamental changes in the way the consumer thinks about fairtrade.

6. CONCLUSIONS

This paper has set out the history of the fairtrade industry in the UK from a marketing perspective from the late 1950s to the early 2010s. The paper has provided a novel in-depth exploration of the three fundamental UK fairtrade market development phases highlighted the pioneering role of Oxfam UK and Traidcraft, stakeholder engagement, and developed a structural representation of the fairtrade industry depicting the connections between key players. The paper has further demonstrated the extent to which the shift from niche to mainstream market impacts on consumer engagement, ethical values dilution and the long-term marketing viability of the fairtrade industry in the UK. To stem the tide of passive purchasing behaviour, less consumer engagement and possible ethical values dilution, focussing mainstreaming around people who care about fairtrade and can afford to pay more for more, rather than targeting everybody by adding to the market as many fairtrade products as possible is essential. The authors' conclusion is that the fairtrade market in the UK is at a serious risk of experiencing less consumer engagement and loyalty with the transformative message of fairtrade, which would not guarantee the long-term viability of such an important market for the social movement.

The paper highlighted several areas that require further research. In retrospect, it is possible (if not likely) that mainstreaming fairtrade products into supermarkets has attracted new shopper segments with diverse values, who buy fairtrade products for different reasons from those who were responsible for the early development of the fairtrade market in the UK. If these new shoppers have different values, then their needs may differ and their treatment by manufacturers, retailers and marketers of fairtrade produce should differ too. Looking ahead through a marketing lens, it is critical for future fairtrade marketing research to provide a comprehensive and objective understanding of the characteristics of the UK fairtrade shopper, the marketing drivers of fairtrade retail sales growth and the role that different human values play in the purchasing behaviour of fairtrade products in the mainstream environment of the UK supermarkets.

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