MARKET REPORT

GATEWAY TO FAIR TRADE FASHION

Home of Fair Trade Enterprises

In partnership with AMANI foundation

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List of Abbreviations

WFTO	World Fair Trade Organization
B2B	Business-to-Business
FT	Fair Trade
WP	Work Package
SAR	Self-Assessment Report
CO	Common Objective
GS	Guarantee System
QR	Quick Response

01

Introduction

Fair Trade enterprises all around the world, both WFTO members and others, work in accordance with ethical and sustainable production practices through which they produce high quality goods among which there are those to be used in the fashion industry in the form of garments, fabrics, accessories and jewelry. These mission-led enterprises put ideals related to the betterment of employment conditions, improvement of livelihoods and care for the environment into actual practice, and therefore demonstrate clearly that an ethical mode of production and an alternative business model to the one of profit-primacy are indeed both attainable.

However, it is clear that there is a noticeable gap in terms of business relations between Fair Trade producers and wholesale or B2B buyers in the fashion industry. Although there is an increasing interest on the part of fashion buyers to engage in sustainable sourcing, unfortunately a significant portion of these efforts do not easily extend to and reach Fair Trade producers who are willing to supply products that would meet the demands and high standards expected on the part of the buyers in the sector. The Gateway to Fair Trade Fashion project builds on the notion that this problem needs to be solved, and a well-informed strategy should be developed to bridge this gap between FT producers and buyers in order to increase FT sourcing in the fashion sector.

Starting off from this notion, the overall project is expected to be implemented in three years across five work packages and in three main research periods/sections. In this respect, while the first work package outlines the overall management, preparation for the project activities and development of the action plan for the initial phase of the project, the following three work packages will constitute the implementation phases of the project with their specific methodologies and timelines. As the ultimate point of action for the project, the final work package's activities will be dedicated to the dissemination of the research findings as well as to the upscaling of the practices that will be tested as a pilot program during the different research phases.

In summary, the work packages are planned as follows:

1. WP1 - Project Management
2. WP2 - Benchmark and Connect
3. WP3 - Design and Delivery of New Solutions
4. WP4 - Pilot Program and Engagement
5. WP5 - Dissemination and Upscaling

This Fair Fashion Market Report is presenting a detailed account of all the activities under WP2, Benchmark and Connect. In the following sections, the report will provide in-depth information on the methodological development and implementation as well as the two analyses constituting the main outcomes of this phase of the project, namely the SAR and the survey analyses and results.

02

Methodology and Implementation

2.1. – Outreach Phase for Participation in the Project

After having completed the concept note for the project at the end of February, the project team first started the implementation of the project with the mapping potential stakeholders from WFTO members to invite to participate in the project. A compiled list of 100 WFTO members has been finalised as of the first last week of February. It should be noted here that the project team decided to use this list as a reference point to consult for fashion industry related WFTO members, and not to use it as the sole contact list to invite participation for the project. As WFTO has a diverse and ever-growing membership network, there is always a small risk of failing to include a relevant member in the project. Therefore, in order to avoid such an unwanted and unintended omission, the project team has decided to reach out to all WFTO members at the early stages of the project and pursue a targeted communication strategy at later stages, if needed.

Furthermore, two forms, one for WFTO members[1] and another for potential participants from wider FT networks[2] whom would be contacted and reached out to in the next phases of the project were created. Both forms also served the function of consent obtainment from potential participants for the purposes of the implementation of the project.

The outreach action of the project started first with the communication to all WFTO members on 15 March 2023 with the sending of the internal WFTO newsletter in which a short project description has been included along with the link to the survey mentioned above to sign up for participation for members. Furthermore, the second outreach action to invite WFTO members took place on 21 March 2023 through sending an email dedicated to the description of the project including an invitation to participate to all WFTO members. At this stage, the project team aimed to get a 10% response rate from the WFTO members and the wider networks which would ideally provide a number of 40-50 stakeholders to work together with for the implementation of the project.

As the project also aims to reach out to more fashion-related enterprises embedded in the FT movement, especially buyers, beyond WFTO membership, the project team further engaged in outreach activities in the initial phase of the implementation. In this respect, the Project Coordinator traveled to Los Angeles to attend the Fair Trade Federation Conference during the last week of March 2023. During the first half of March 2023, the project team, under the guidance of the Branding and Marketing Manager of WFTO, prepared promotional material in the form of flyers with information of the project and a QR link to the participation form to be shared in the conference with potential participants, especially buyers who are not WFTO members. At the conference, the Project Coordinator benefitted from this promotional material, and connected with 2 buyers/brands who expressed interest in the project. In addition to these efforts, the project team published a call on Common Objective platform to increase the participation of external buyers and brands from the fashion industry. Common Objective is the biggest online network/community in the world for any individual or brand working in fashion or interested in sustainable fashion practices with a membership of over 45.000 people and enterprises. WFTO has built a strategic partnership with CO over the past years through collaborative projects, therefore it will be significant to benefit from it in different ways in the future for the Gateway Project, which can be discussed further in the upcoming periods. From the call on CO, the project attracted the consent of 6 brands and buyers who expressed the interest in the project. In order to compile their names, a form on the Jotform[3] platform was created by the project team.

[1] https://docs.google.com/forms/d/e/1FAIpQLSdmad-VQm_rlB1T21M4Fmb5bE40VfwGMvjuHsu2E0drh--BaQ/viewform
[2] https://docs.google.com/forms/d/1acPYy1u4srhrxqx0oAjOPUpQYCWtWxgpXebkgE8CcG4/viewform?edit_requested=true
[3] https://form.jotform.com/231274197926060

After sending another round of targeted emails to the specifically created list from the fashion category of WFTO members, the number of participants from the WFTO ecosystem became finalised by the end of April. Accordingly, the project attracted the interest and the consent of 49 WFTO members, 7 WFTO applicants and 1 WFTO ex-member with a total of 57 enterprises from the WFTO ecosystem. The reason we would like to specifically share this breakdown information has to do with the number of SARs that the project team had the opportunity to work further with for the SAR analysis phase as not all actors from the WFTO ecosystem had completed self-assessment reports. As WFTO affiliation can take the form of ex-membership, whom often re-join WFTO when necessary improvements are met, as well as applicants whom are on the path towards membership, not all enterprises from the WFTO ecosystem are members with completed or up-to-date SARs. As noted above, out of the 57 affiliates of WFTO who expressed interest, an overwhelming majority of 49 were indeed members of WFTO, therefore the SAR analysis conducted included their SAR data only.

Data Collection Development and Implementation Phase

During the first half of April, the project team conducted a closed reading of the SAR to get themselves familiarised with the process as well as to determine the relevant sections from SAR that could be used to draw a cumulative quantitative analysis of the 49 members' data. SAR is a tool designed by WFTO's Guarantee System in order for the FT enterprises to self-evaluate their progress and their business operations. It is an insightful tool that provides significant information about the needs, limitations, obstacles as well as best practices of WTFO members working in relation to the fashion industry. In this respect, the team determined a series of questions and segments from this report based on which they developed a tool on Jotform platform to compile this data in a meaningful and useful manner. During the first half of May, the SARs from the 49 members were obtained by the project team from the GS server, and the relevant data was retrieved and then entered into the Jotform for the complied analysis which was completed during the second week of May and shared with all the project stakeholders. The data showed significant trends regarding the activities, engagements, needs, business practices and expectations on the part of the 49 members from WFTO which is shared in the following section in detail.

Immediately after the completion of the SAR analysis, the project team started working on the development of the surveys to be shared with WFTO affiliates (members, applicants, ex-members) as well as the 8 external brands/buyers who wanted to be part of project based on the outreach the team engaged with in Los Angeles and through the Common Objective platform. During this process, the project team also consulted the Guarantee System team in order to better understand how certain information which is not necessarily obtained through the SAR but is nevertheless beneficial to know about WFTO members can be incorporated into the surveys in a useful manner. Based on the feedback as well as the SAR analysis itself, the project team created 3 surveys for the next phase of the project: one for the producing affiliates of WFTO (primary and secondary producers), one for the non-producing affiliates of WFTO and one final for the external buyers/brands who were incorporated into the project. It should be noted that the first two categories of WFTO affiliates (members, applicants, ex-members) have been determined in accordance with the description of their enterprises they choose in their SARs, application forms or correspondence with WFTO. In the SAR as well as the application form, each enterprise needs to choose a category describing their business from a list of the following categories: 1. A primary producer organisation (co-op, community group, small enterprise or family workshop), 2. A second level producer organisation (e.g. cooperative union), 3. An intermediary, marketing or export organisation, 4. A Fair Trade import organisation, 5. A Fair Trade support organisation, 6. A Fair Trade Network, and 7. Other. In this categorisation, there is a natural divide which can be beneficial in understanding the general needs and activities of WFTO affiliates broadly, which is between producing (categories 1 and 2) and non-producing (categories 3,4,5,6 and 7) enterprises.

Therefore, the project team decided to develop 3 sets of survey questions to be shared through 2 surveys designed on JotForm platform, one for the WFTO affiliates[4] and the other for the external participants[5]. The former was designed in such a way that it allowed for the participants to encounter a different set of questions based on their answer to the third question, namely the one that inquires whether or not they are primary or secondary producers based on the description they provided in their Self-Assessment Reports (SARs).

The project team designed the survey for the producer and non-producer WFTO affiliates in a way that enterprises belonging to either category can express their business processes as clearly as possible and provide more in-depth insights than what the SARs present. Especially in the non-producer category of the WFTO members/affiliates, the project team was highly aware that WFTO had a variety of different businesses as outlined above which do not easily fall into one category. Therefore, the project team also consulted the GS team experts in this process to make sure that the questions can make a general sense for all the participating members/affiliates. For instance, there are questions about importing activities for non-producers but there also exists the option of choosing not applicable in addition to asking questions about whether or not they have exporting activities or domestic market activities. In this way, the project team would like to see how the members/affiliates whom are not defined as primary or secondary producers engage in certain business processes vis-à-vis the enterprises and markets they buy from and sell to at the same time. It is also of significance on the part of any research team to be aware of the shortcomings of any cumulative data collection survey and make sure that data is supported through other means to ensure further clarity and precision. Thanks to the discussion groups which will be formed in the following months of the project to talk about these issues in detail, the project will have the chance to further address the specific needs, concerns and experience of any of the participating enterprises form the WFTO ecosystem specifically, and be able to support the broad data obtained through the survey with in-depth direct insights.

The surveys were shared with the finalised list of 57 WFTO affiliates and 8 external brands/buyers during the last week of May. The project team started gathering the responses immediately, especially in order to double check whether the enterprises with the completed SARs have also filled in the survey form's third and separating question about the organisation being a primary/secondary producer or not in accordance with their responses in their SARs. There were a few responses that were not in alignment with the SAR categorisations of the organisations, and the project team acted swiftly to contact each organisation who were in this position personally to inquire about their survey response and ask them to re-submit their responses correctly. Furthermore, the project team actively contacted the organisations who did not submit their responses in several rounds until 5 July, both collectively and personally, in order to make sure that all 57 whom had expressed interest would be included in the survey analysis and further discussion groups as well. In the end, 48 members and affiliates completed the survey out of the 57 whom expressed interest, and one member officially withdrew from the next phases of the project.

[4] https://form.jotform.com/231343725050345

[5] https://form.jotform.com/231353449979066

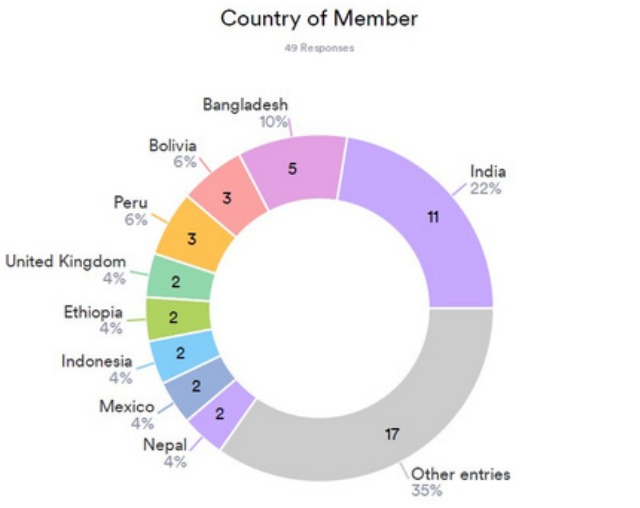
03

Analysis

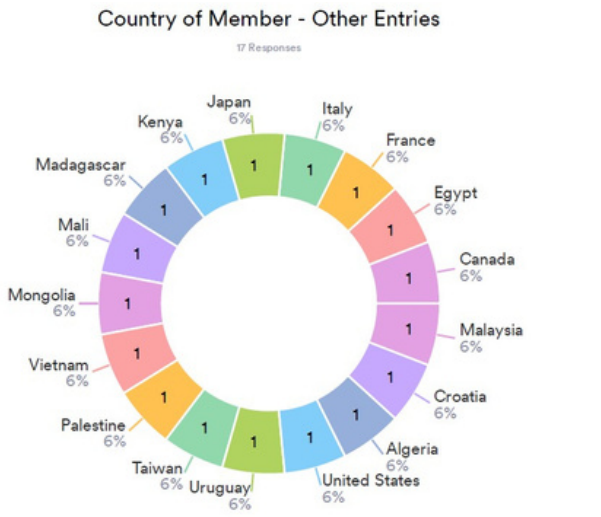
3.1. – Findings of the SAR Analysis

As mentioned above, the SAR analysis has been conducted on the basis of the compiled data coming from 49 WFTO members whom expressed interest in the project. In this analysis, only the members who have completed SARs in the WFTO system have been included. The rest of the 8 affiliates whom are predominantly applicants have not been incorporated due to the lack of a completed SAR at this stage as they are not members yet.

The figures below illustrate the countries in which the 49 WFTO members who expressed interest in the project are located. As expected, India and Bangladesh based enterprises lead the number of participants since both countries are also among the top three countries where our members are based overall. In total, we have managed to reach WFTO members from 26 different countries for this project, which will provide the project team with a wide range of invaluable insights.

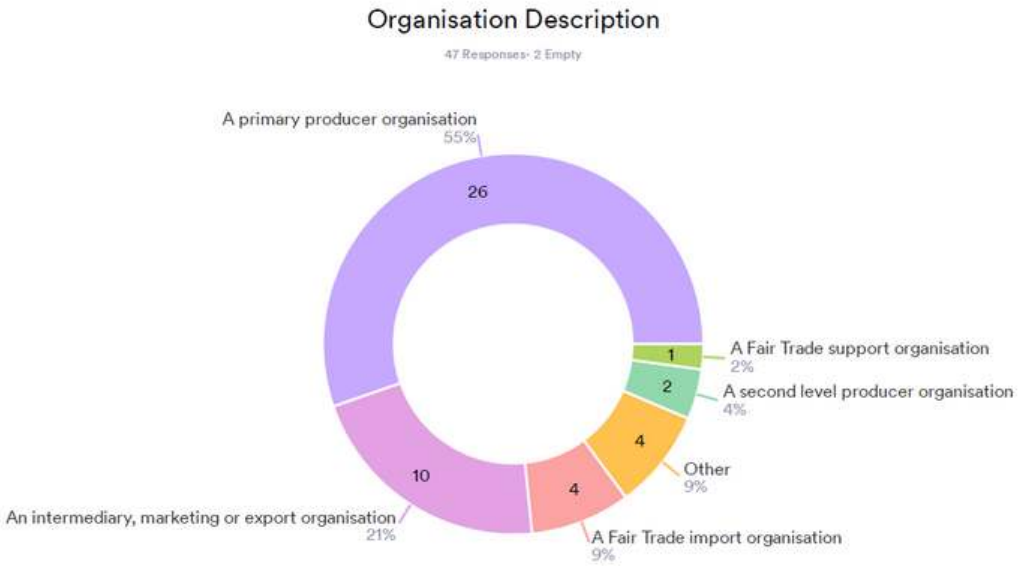


Graph 1.
Country Distribution of Members



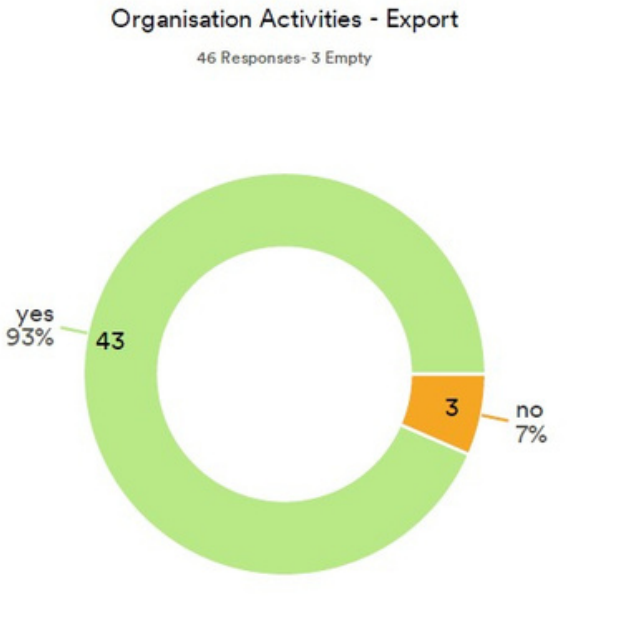
Graph 2.
Country Distribution of Members in Other Entries

Another important figure pertaining to the participating members is related to the description of their organisations. In the SAR, each member organisation is asked to choose a definition for their enterprise from a drop down menu as it was already detailed earlier in this report. As the below figure illustrates, the participants come from a variety of organisations and there is a 28 to 21 ratio between producer organisations (primary and secondary) and the non-producing members which has provided the project team with a balanced picture in terms of the type of the enterprises. As the figure further indicates, we don't have any interest for the project from a Fair Trade Network member from the WFTO membership body.

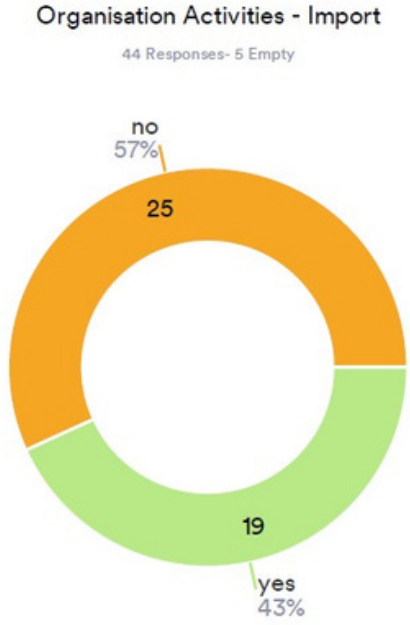


Graph 3.
Organisation Description of Members

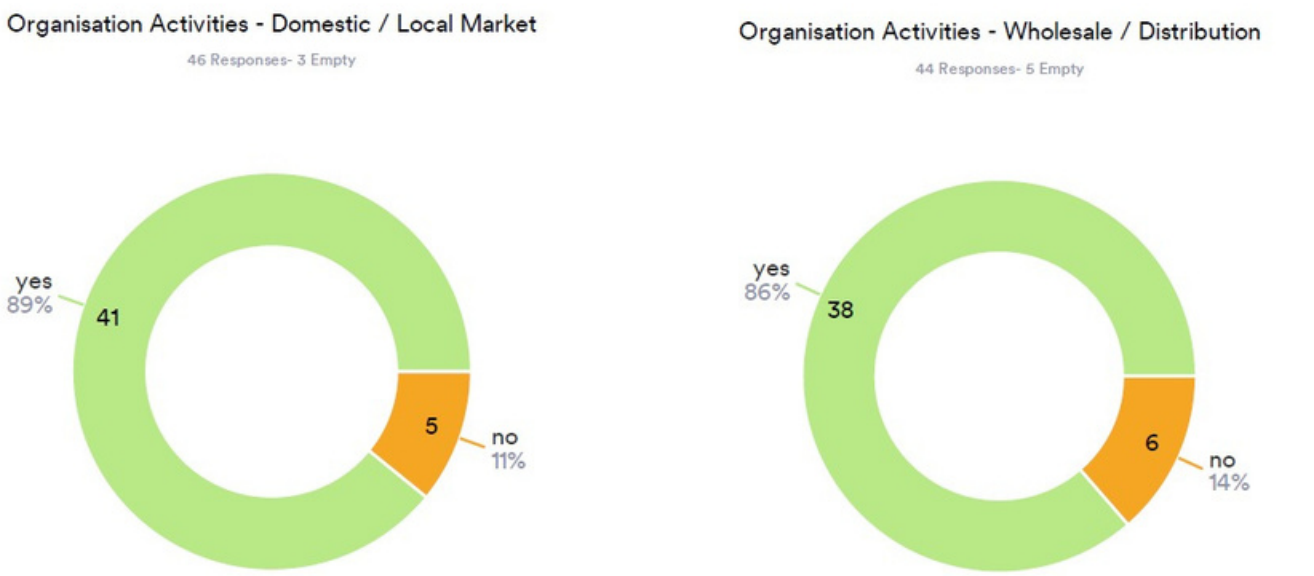
The project team also looked into the details of the 49 WFTO members in terms of their organisational activities as expressed in their SARs. As the figures below illustrate, there is an overwhelmingly high percentage in export, working in the domestic/local markets, engaging in wholesale/distribution, retail and production/processing processes in the overall activities that the 49 members engage in. On the other hand, we see a more balanced ratio regarding import and mail order activities that the members engage in in their business processes.



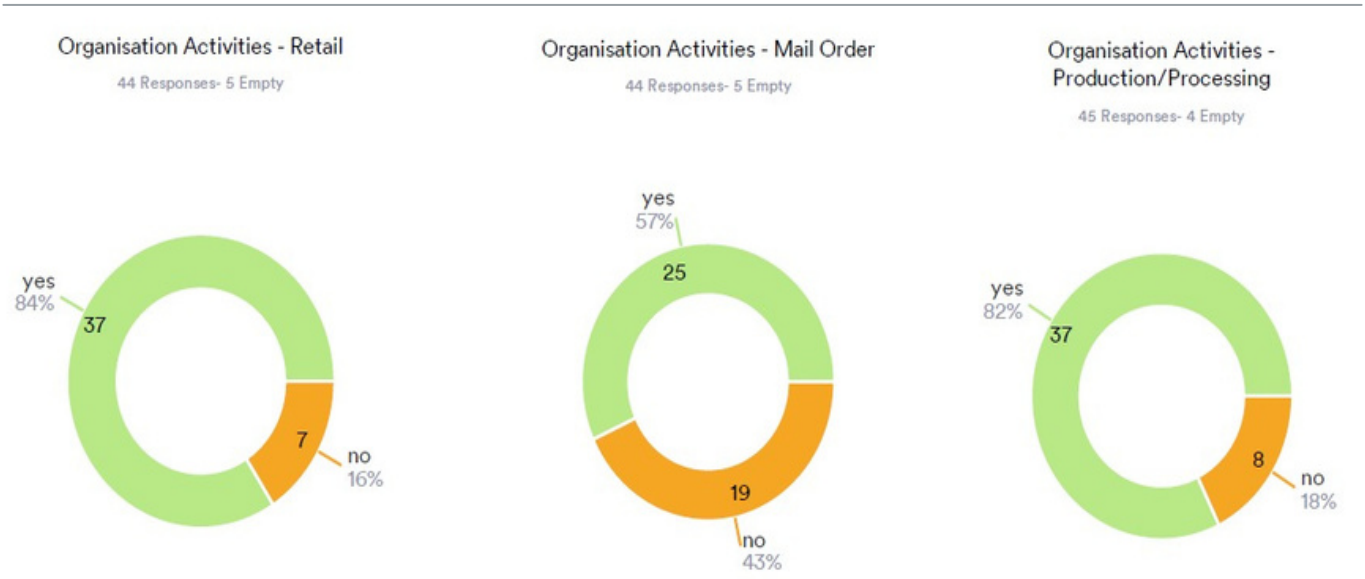
Graph 4.
Organisation Activities of Members in Export



Graph 5.
Organisation Activities of Members in Import

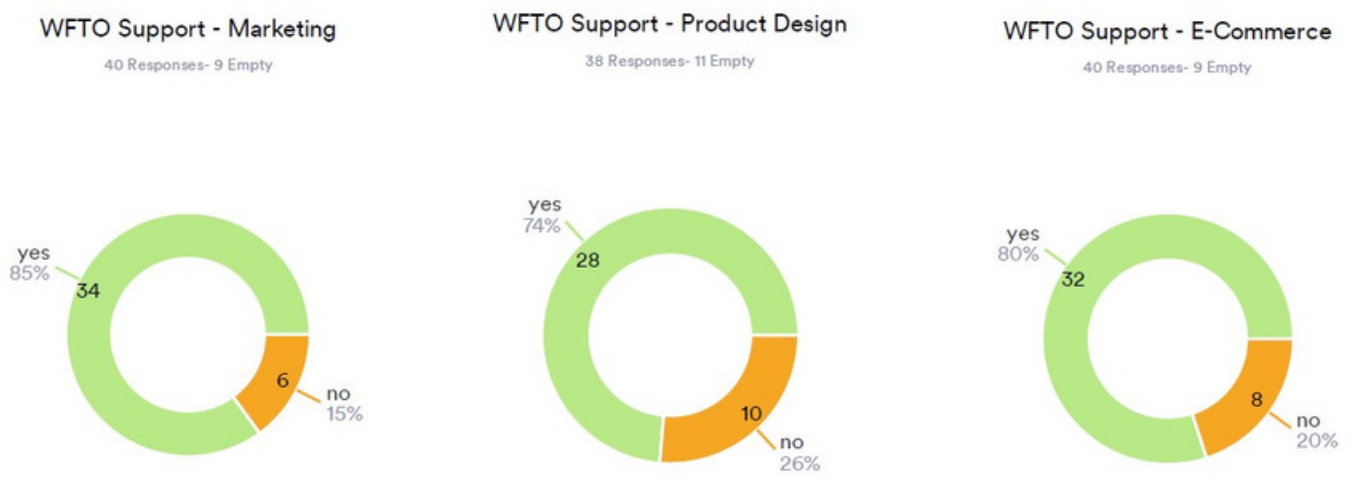


Graph 6.
Organisation Activities of Members in Domestic, Local Market, Wholesale and Distribution



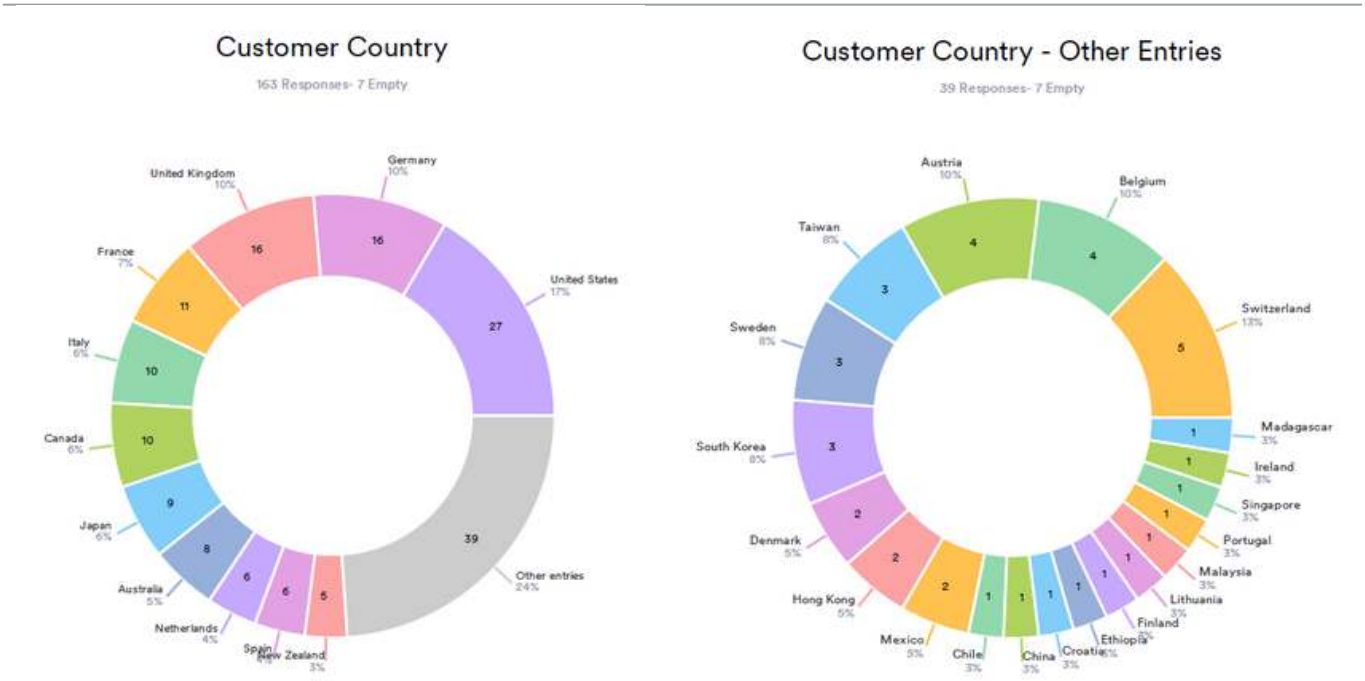
Graph 7.
Organisation Activities in Retail, Mail Order and Production Processing

The project team also inquired into the 49 members' positions vis-à-vis the support that they expect from WFTO in different matters. For the purposes of this project, the team decided to take three points into consideration, namely marketing, product design and e-commerce needs of the members. As the graphics show, there is a significant majority of affirmative responses for all three categories, the biggest of which can be seen for seeking support from WFTO for marketing activities.



Graph 8.
WFTO Support on Members in Marketing, Product Design, and E-Commerce

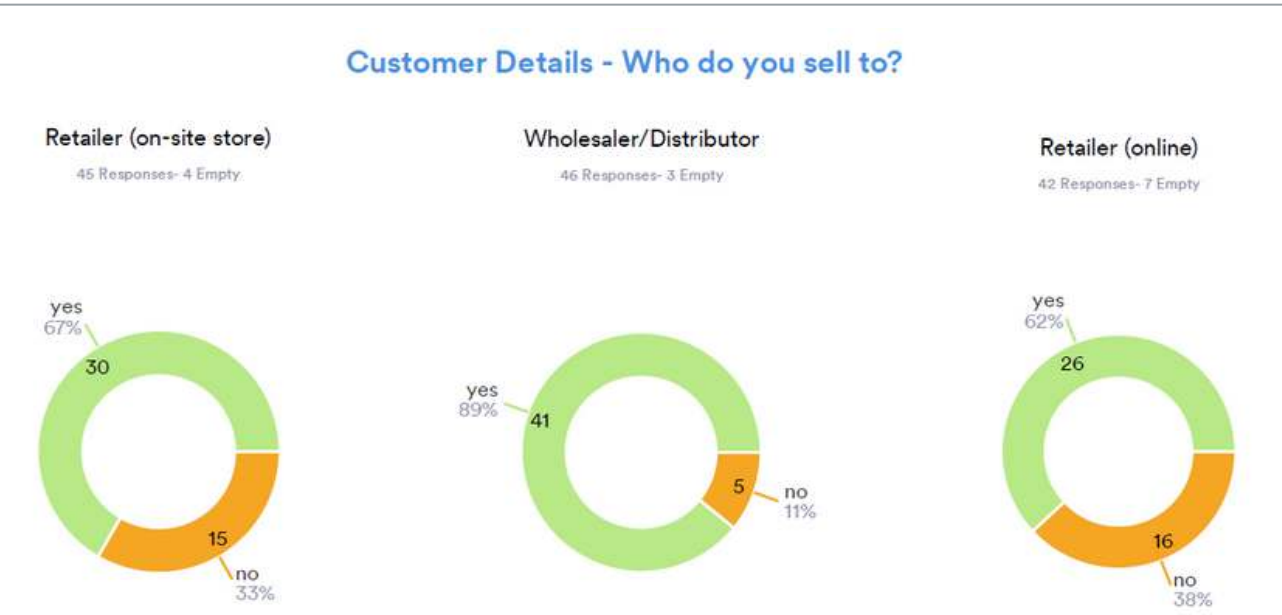
In terms of the customers of the participating WFTO members, the project team looked into their location first. As the data sets demonstrate, a significant majority of their buyers are located in Europe and North America which shows us that there is a stark difference between where the participating trading members are located themselves and where they sell the products to. This finding made it clear for us that we need to address the issues pertaining to logistical, legal and export-related matters more specifically in our survey design, which we incorporated both for producing and non-producing member/affiliate surveys.



Graph 9.
Customer Countries of Members and Other Entries

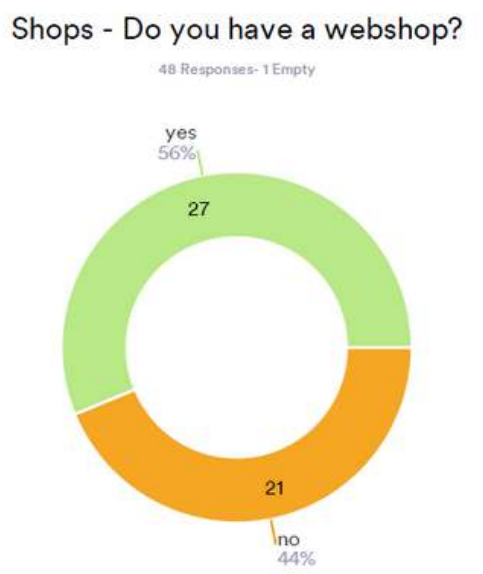
In terms of whom the 49 participating members establish business relations with as buyers, we see that the majority of them do sell directly to customers either online or on-site as well as to retailers in a similar manner. In this section, we see predominantly established relationship with wholesaler and distributors as buyers while manufacturing enterprises do not constitute much significance for these members as buyers to whom they sell products.

Graph 10.
Customer Segmentations of Members for Online Final Customers, Manufacturing, Food Processing Enterprises, and Final Consumer On-site Stores



Graph 11.
Customer Segmentations of Members for On-site Retailers, Wholesaler, Distributors and Online Retailers

Regarding channels through which the participating members sell products, the project team benefitted from the questions in the SARs about whether members have a physical or online shop. As the figures clearly indicate, there is more or less a balanced situation as to the members having an online or on-site shop. These figures show us that although they significantly sell to wholesalers, retailers and distributors, they still have their own platforms to engage directly with customers.



Graph 12.
Webshop Availability and Product Selling Locations of Members

The final finding of the analysis has been obtained based on the below question asked to each member in the SAR. A crucial component of Fair Trade is establishing long-term business relations in order to ensure stability for people whose work is part of mission-led enterprises. Accordingly, our data clearly demonstrates how these enterprises commit to and sustain long-term relations with their trading partners. As the below figure shows, 95% of the participating WFTO members have long-term business partnerships which not only contributes to the sustenance of people's lives, but also shows how reliable Fair Trade enterprises are in business partnerships.

Graph 13.
Percentage of Members with Relationships of 3 Years or More with Traders

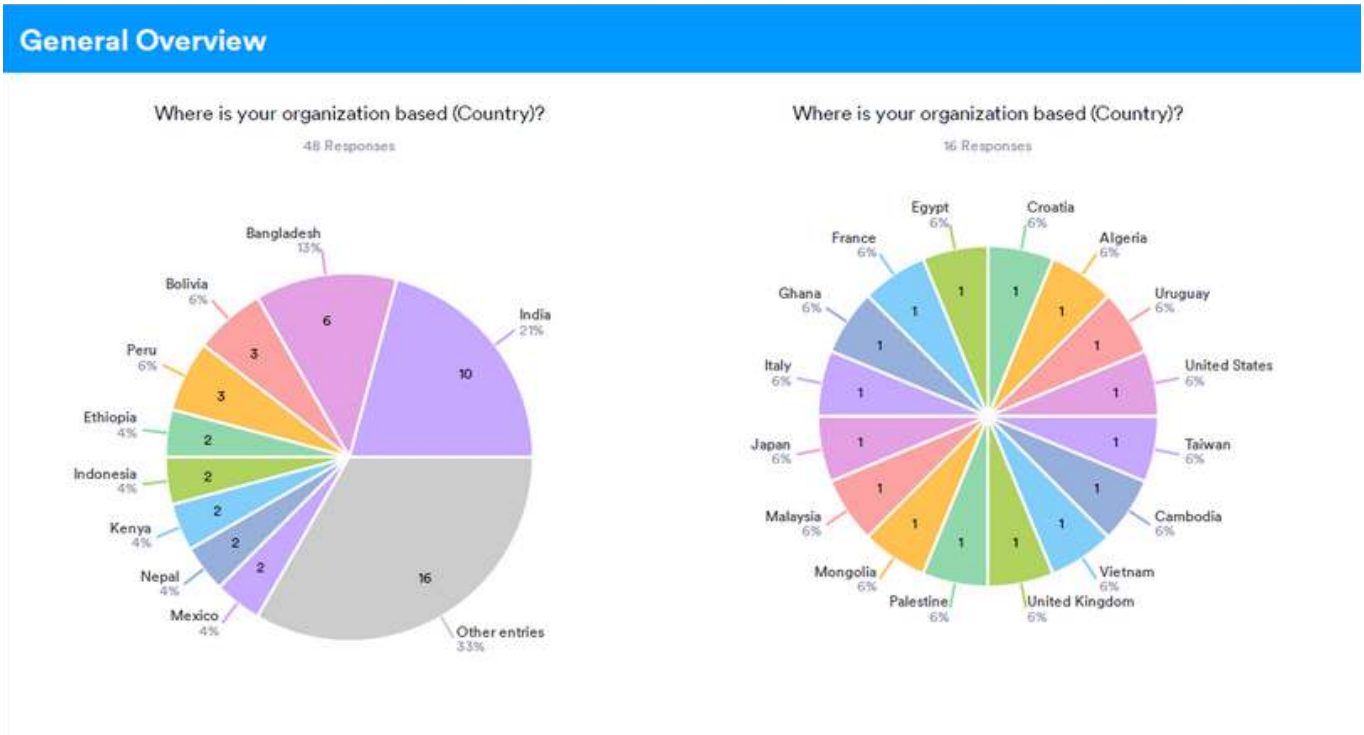
In this section, we outlined the main findings of the SAR analysis conducted based on the reports of the 49 participating WFTO members to this project. The next section will discuss the findings obtained from all WFTO affiliates as well as external buyers through the three surveys developed based on the SAR analysis. This way, the project will be able to present a well-informed account of the issues in the fashion sector for producers, intermediaries and buyers affiliated with Fair Trade which will then inform the discussions of the action groups to be formed later in the project implementation.

3.2. – Findings of the Survey Analysis

3.2.1. – Members and Affiliates

As detailed in the previous section, the members and affiliates whom expressed interest in the project were in total 57. As of the end of May, all of these stakeholders received the invitation to participate in the developed survey which they could fill in until 5th of July. The reason why the data collection phase lasted longer than the initially expected 3-4 weeks was due to the slow response rate of the potential participants whom had already expressed their interest in the project. Weekly reminders were sent over the course of 3 weeks which were then gradually converted to bi-weekly and then to more frequent ones until the 4th of July in order to secure a high number of participation to the survey.

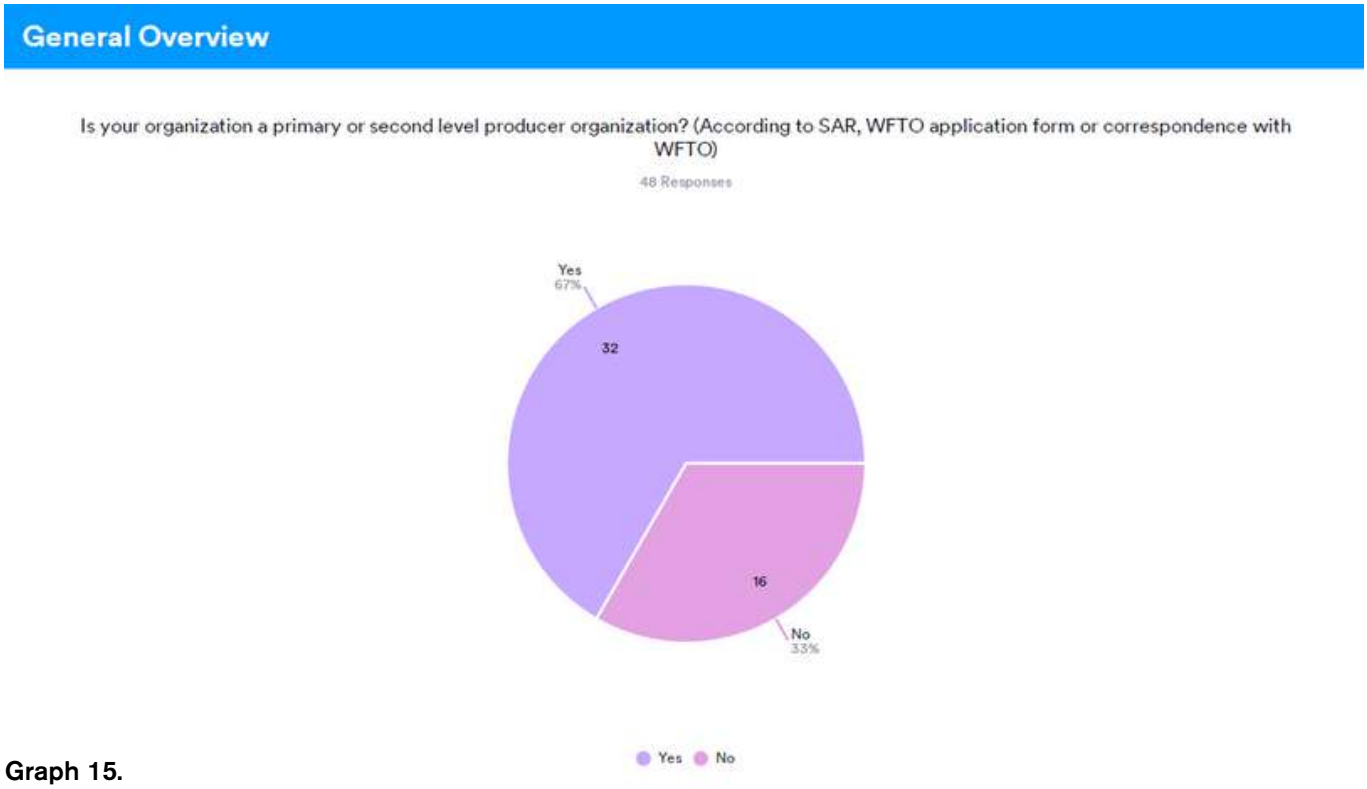
The figures below illustrate the countries in which the 48 WFTO members and affiliates who filled in the survey are located. As expected, India and Bangladesh based organisations have the highest number of participation since both countries are also among the top three countries where our members are based. In total, with this survey, we have managed to reach WFTO members and affiliates from 25 different countries for this project.



Graph 14.
Country-wise Distribution of Members and Their Organisations

As described in the methodology section, the survey for members and affiliates was designed in such a way that it made it possible for the participants to see a different set of questions based on their answer to the third question that asks them whether or not they are primary or secondary producers based on the description they provided in their Self-Assessment Reports (SARs) or applications forms.

The below figure indicates the breakdown between the participants of the survey based on their production status. Accordingly, we can see that one-third of all the respondents are non-producing enterprises whereas the two-thirds majority are producing ones. This is an expected result given that the majority of WFTO members are producing FT enterprises.



Graph 15.
The Producing Level of Organisations

Based on the answer given to this particular question, the survey respondents received a different set of questions that addressed them as producers (22 questions) or non-producers (13 questions) in order to gather data from them appropriately. It should be noted here that throughout the process during which these responses were collected, the accuracy of the submissions were checked regularly by the WFTO project team. In other words, in order not to create any inconsistency between the SARs and the survey responses, each submission was checked to determine whether the status of the respondent was indicated correctly in the survey in accordance with what they had expressed in the SAR. In case there was an inconsistency, the respondent was contacted immediately and was asked to re-submit the survey with the correct information regarding their producing or non-producing status. In total, 11 respondents submitted incorrect information to this question, they either responded yes to it although they are not producing members as per their SAR or vice versa. As mentioned, immediate communication was initiated by the project team, not only in English but also in Spanish and French if needed, with these members to correct this mistake. 10 out of these 11 members corrected their submissions. Only one member did not take any action after 5 rounds of warning emails between 26 June and 5 July, and the project team has decided not to pursue them any further as it was also time to close the survey to start the analysis. The submission was not omitted from the analysis and as incorporated as it was submitted.

The above issue presents us with a number of significant findings regarding WFTO members and the communication that the WFTO office has established with them. First, it might be argued that around 20% of our members participating in this project (or their personnel) either do not know the description of their enterprises or do not have the time or opportunity to check their SARs before they submit a response to a survey. As the below figure shows, the question specifically refers to their SAR, application form or correspondence with WFTO as references to double check with, which was designed as such in order to prevent any wrong answer in case the person responding to the survey was not entirely sure of the answer and therefore they can be forwarded to the right document to check before their answer.

Secondly, it can be argued that this issue might be pointing out to a different problem, namely whether the categories in the SAR to describe the enterprises are comprehensive enough to adequately describe our members. Based on the correspondence we had with some members during their survey response correction processes, it became clear that the categories in the SAR might not be fully or adequately describing some of these enterprises.

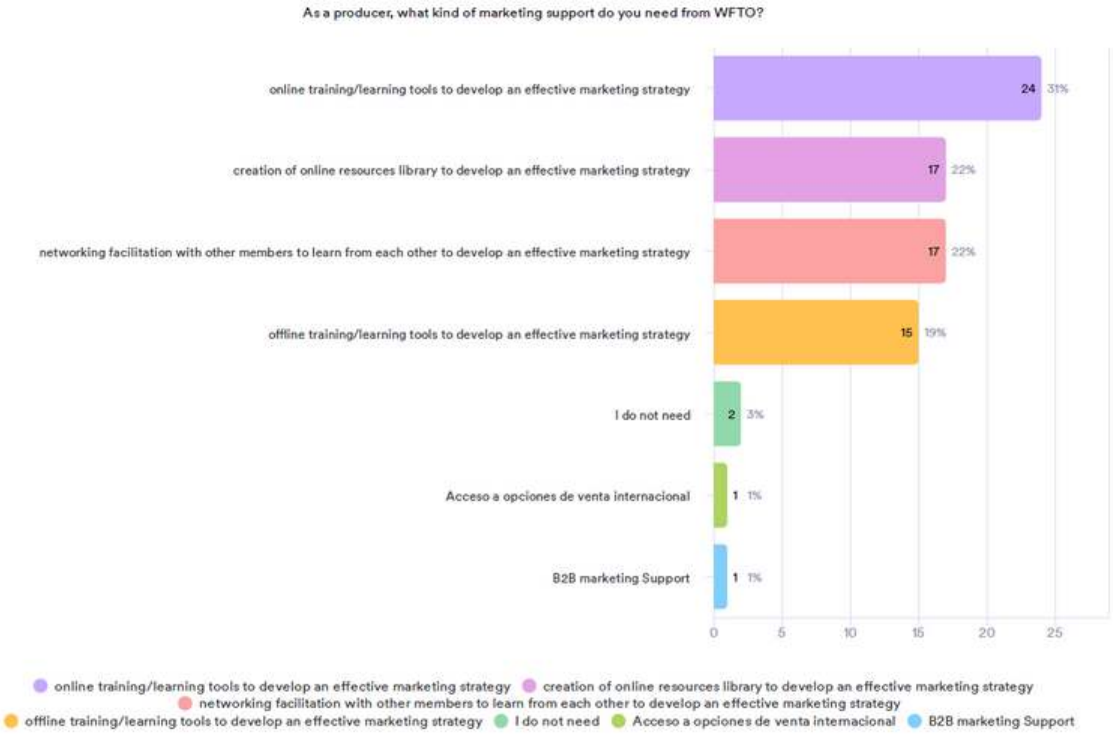
Finally, the fact that the response gathering process took over 5 weeks shows that a better and more effective communication strategy should be developed between WFTO and its members. Although the project team had the most up-to-date contact information of the members who expressed interest in the project thanks to the consent form which was shared earlier to gather consent from members and affiliates to join the project, it took over 5 weeks and 10 rounds of reminder emails to gather 48 responses out of the 57 who expressed interest. With the exception of one member who withdrew their wish to go further, this also means that 8 enterprises who previously expressed interest in the project by signing the consent form (6 Guaranteed Members, 2 affiliates) did not fill in the survey or engaged in any form of communication with the project team to provide any explanation.

This shows that the whole communication strategy between WFTO and its members should be reconsidered and an action plan to establish effective, responsive and proper communication should be developed in this respect.

A. Responses of 32 Producers

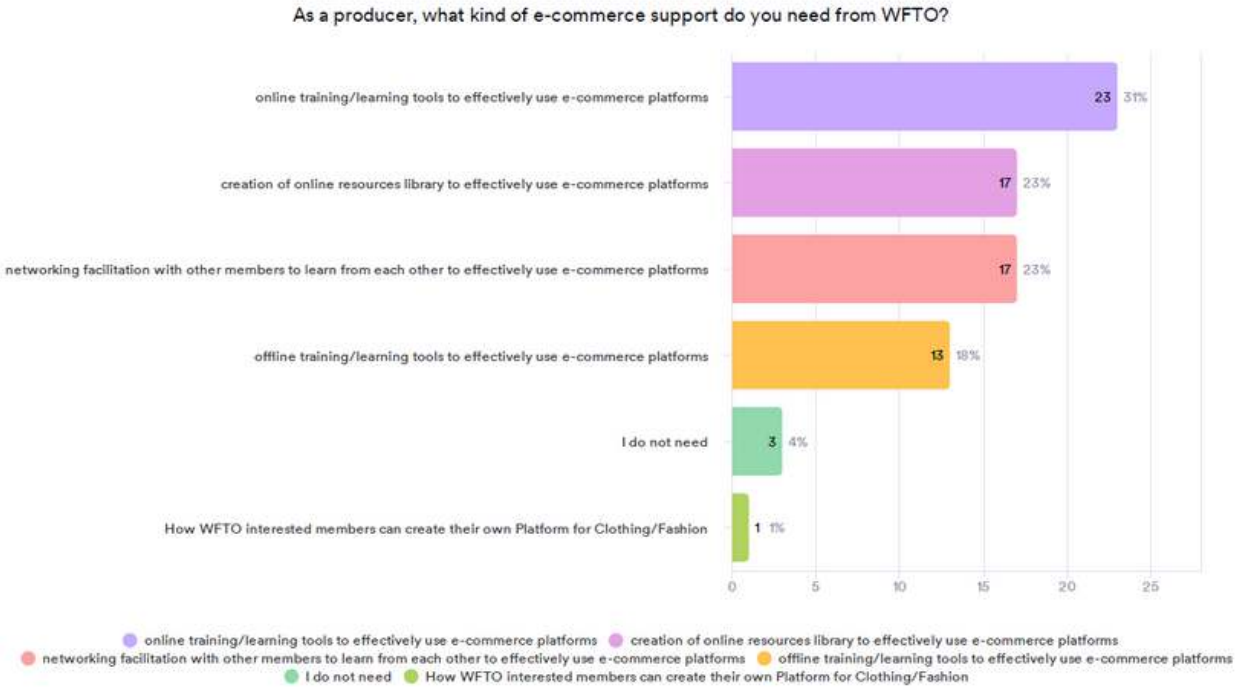
The following three figures show responses to the three different questions with regard to the needs of WFTO members and affiliates as well as their expectations from WFTO to solve related issues. As explained in the previous section, the SAR analysis showed that there is a significant majority of respondents who expressed that they wish to receive support from WFTO for their marketing, e-commerce and design processes. Based on this initial finding, the project team developed the next three questions outlined in the graphs in order to understand in detail what the expected support on the part of WFTO might refer to. These questions allowed multiple choices, and each had 5 options to choose from including one that acknowledges no need, in addition to the option to add one other self-defined one. In each of these results, we see very similar results with online training as the most preferred option and with a very small minority of respondents who expressed that they do not need any support from WFTO in these fields.

Producer Responses - 32 Producers



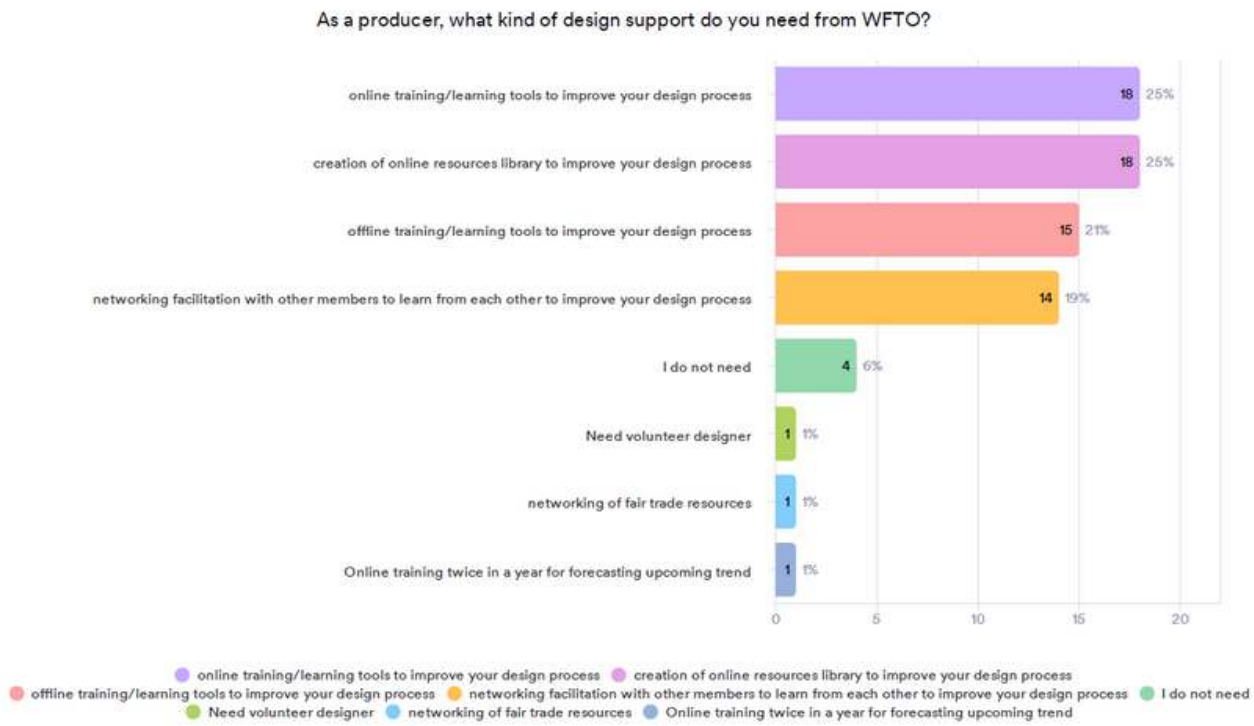
Graph 16.
Marketing Support Requirements of Producers Affiliated with WFTO

Producer Responses - 32 Producers



Graph 17.
E-Commerce Support Requirements of Producers Affiliated with WFTO

Producer Responses - 32 Producers



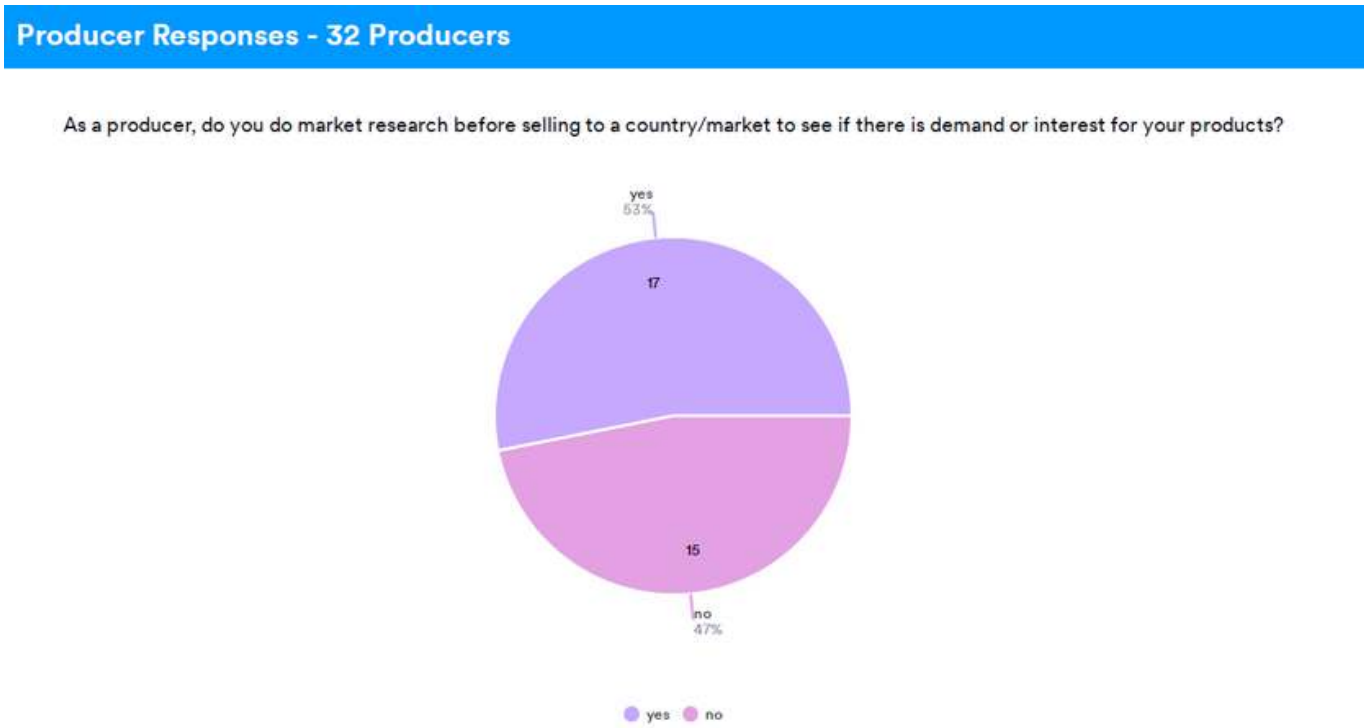
Graph 18.
Design Support Requirements of Producers Affiliated with WFTO

In order to further investigate any possible needs, the survey also asked the respondents whether they would need any quality training for their products for them to meet the expected market standards. Almost two-thirds of the total number respondents responded affirmatively to this question, which demonstrates that there is also a demand for quality training on the part of WFTO members and affiliates which can either be provided by WFTO or externally through their own personal endeavors.

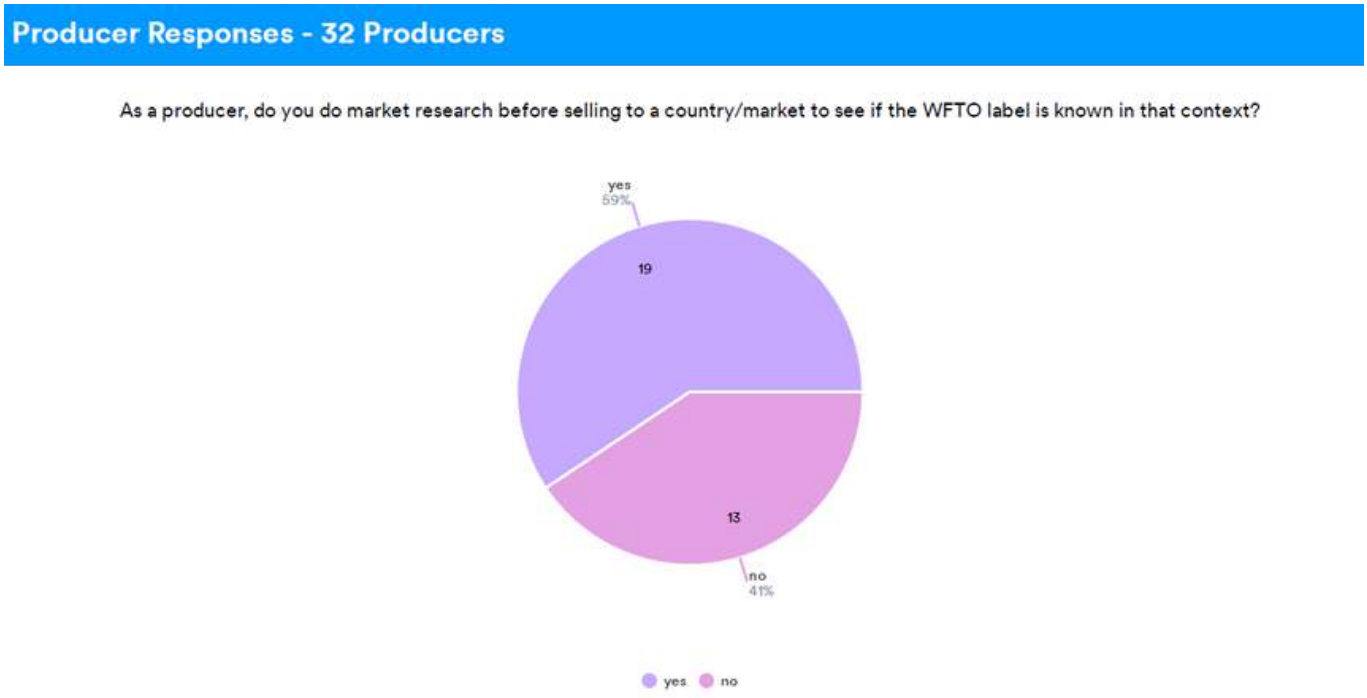
Producer Responses - 32 Producers

Graph 19.
Quality Support Requirements of Producers Affiliated with WFTO

The survey also inquired into the patterns of behavior of the respondents when it comes to conducting market research to sell their products. The results show that while the majority of them engage in market research to understand the relevance of the WFTO label, they do not predominantly look into whether their products are in demand in the markets they intend to or do sell into. This also shows that the respondents should be more attentive to the demands of the markets they engage with in terms of the relevance of their products in order to develop effective sales strategies.



Graph 20.
Market Research Situation of Producers for Selling of an Product



Graph 21.
Market Research Situation of Producers for Awareness of WFTO Label

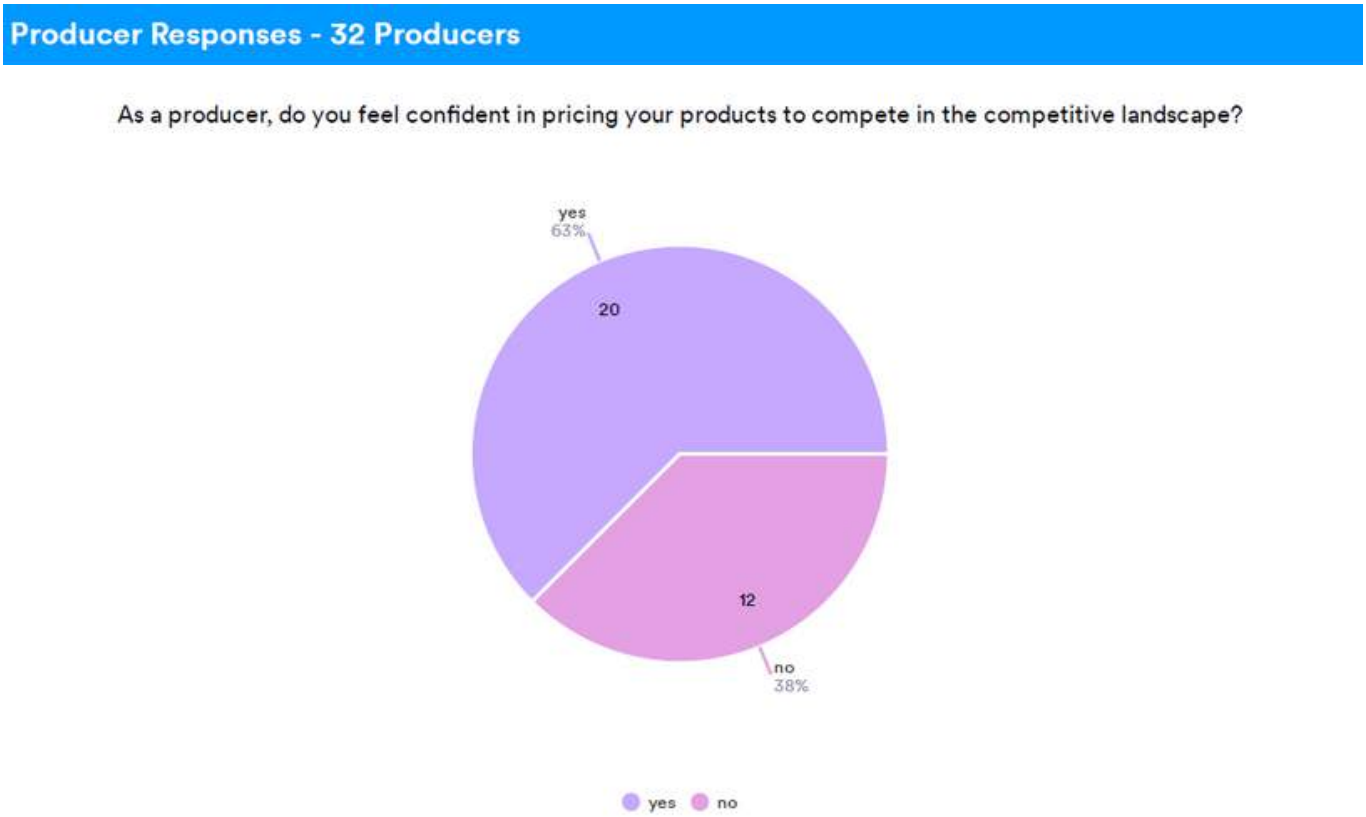
The following six graphs illuminates the dynamics between producers and buyers concerning Fair Trade accreditation and their financial arrangements. From the questions directed to the producers, a significant proportion of buyers (72%) request the proof of Fair Trade accreditation and verification labels. These requests could reflect a growing awareness and emphasis on ethical and sustainable practices in the market and importance of fair trade concepts in the marketplace. Conversely, the remaining small proportion of buyers do not specifically request Fair Trade accreditation.
In terms of financial arrangements, producers were also asked about various facets, including their confidence in competing in the marketplace, negotiating product prices, the necessity for pre-financing production, and their flexibility in negotiating payment terms with buyers. Over half of the producers (63%) expressed their confidence in competitively pricing their products, possibly attributing their products' social value to factors beyond price.

Furthermore, over half of the producers (56%) indicated that they possess control over their product pricing. On the other hand, nearly half (44%) reported facing more stringent pricing structures and limitations during negotiations with buyers. The difference between flexible and rigid pricing strategies profoundly impact businesses' operational choices and their potential success within the Fair Trade market. On the operational front, a significant 72% of producers highlighted the need for prepayments to commence production. This could suggest the producers' financial challenges that they had encountered and how pre-financing influences their efficiency in producing and delivering goods.

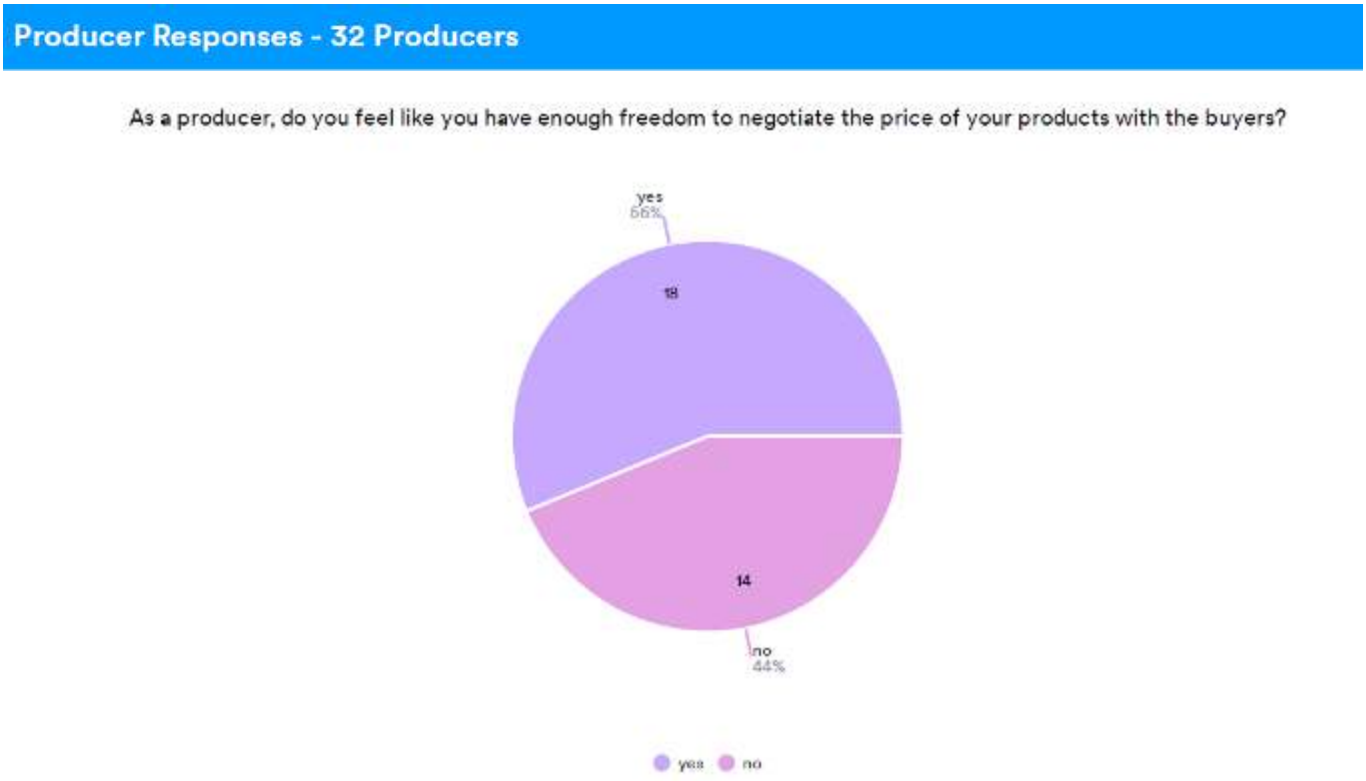
Lastly, the overwhelming majority of producers (88%) express comfort and flexibility in arranging payment terms with buyers. This disposition towards accommodating diverse payment terms cultivates the relationships between producers and buyers, potentially fostering long-term collaborations and facilitating business expansion. Furthermore, based on the responses provided by the producers in Graph 27, it is indicated that a majority of buyers (91%) communicate their expectations, such as service quality, quantity, and other specifications, during the product production process.

Producer Responses - 32 Producers

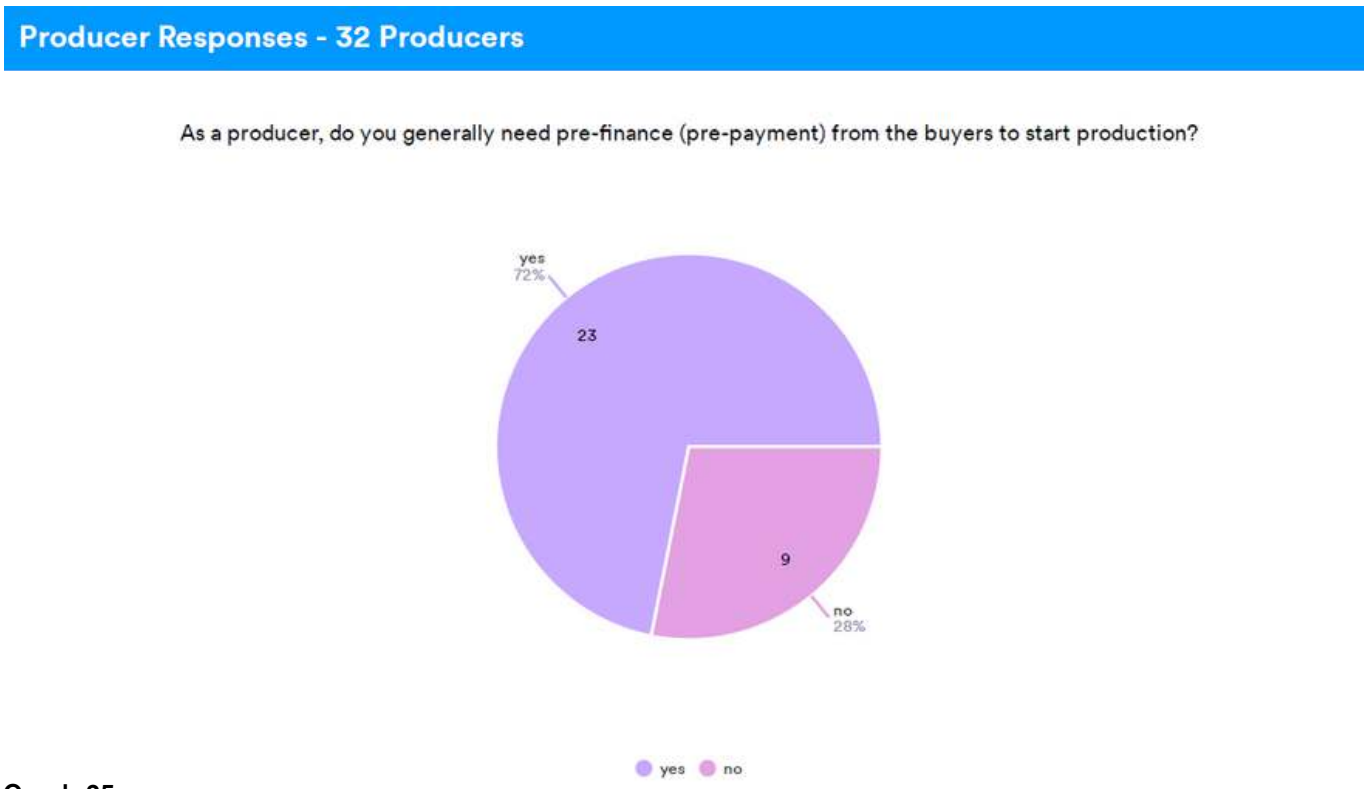
Graph 22.
Status of Fair Trade Accreditation and Verification Requests



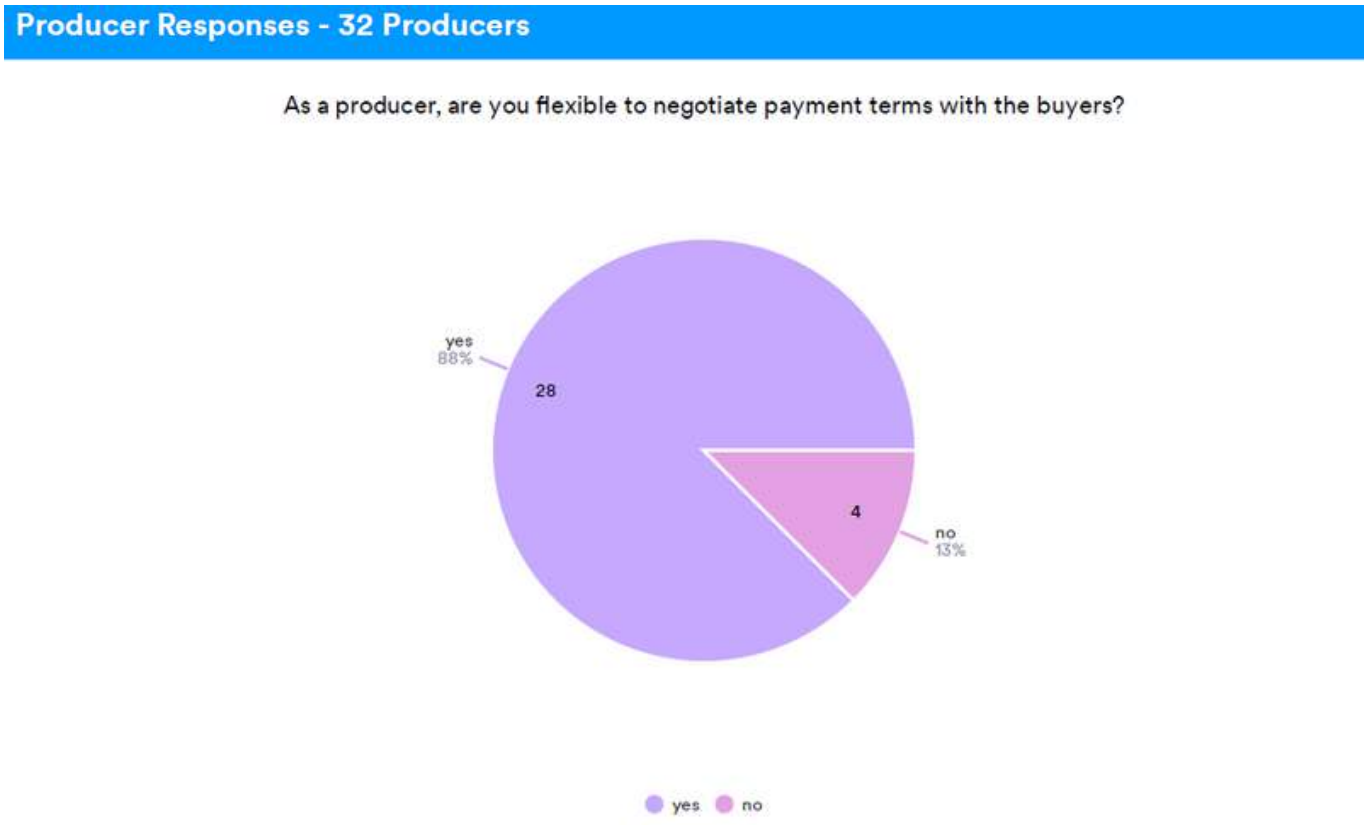
Graph 23.
Confidence Level of Producers in Pricing



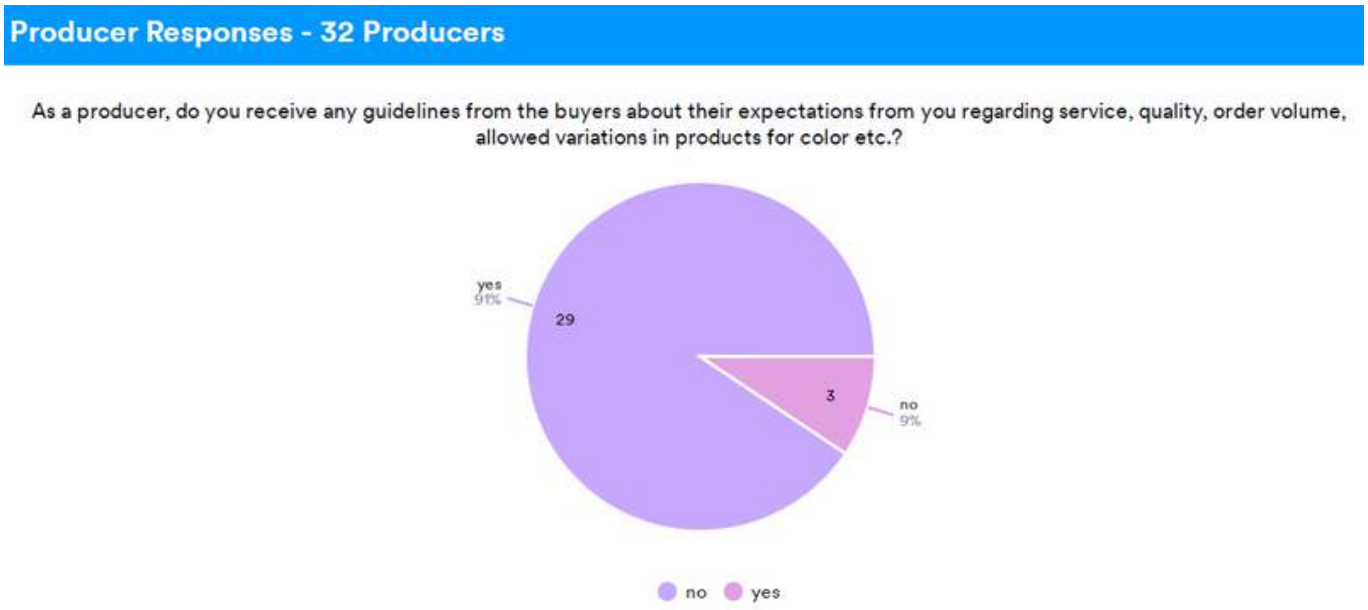
Graph 24.
Producer Control and Pricing Dynamics in Negotiations with Buyers



Graph 25.
Pre-Financial Needs of Producers

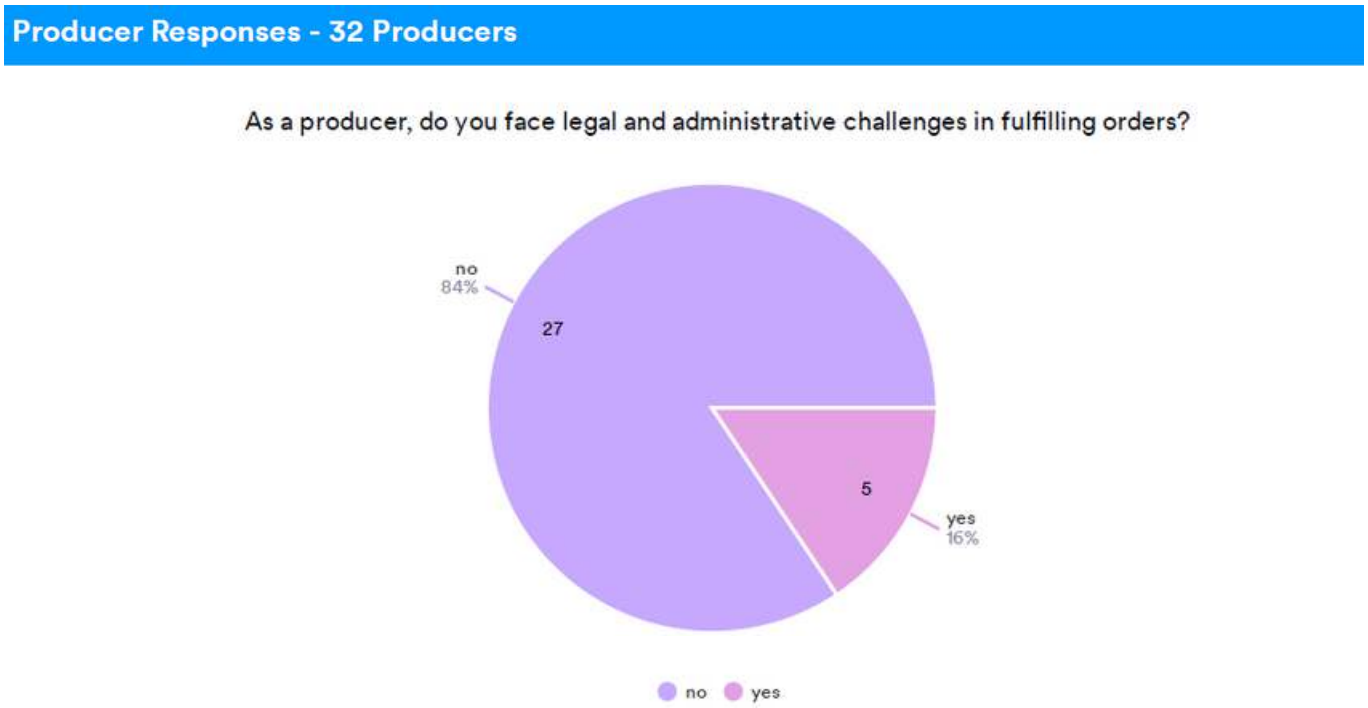


Graph 26.
Flexibility of Producers on Negotiations with Payment Terms



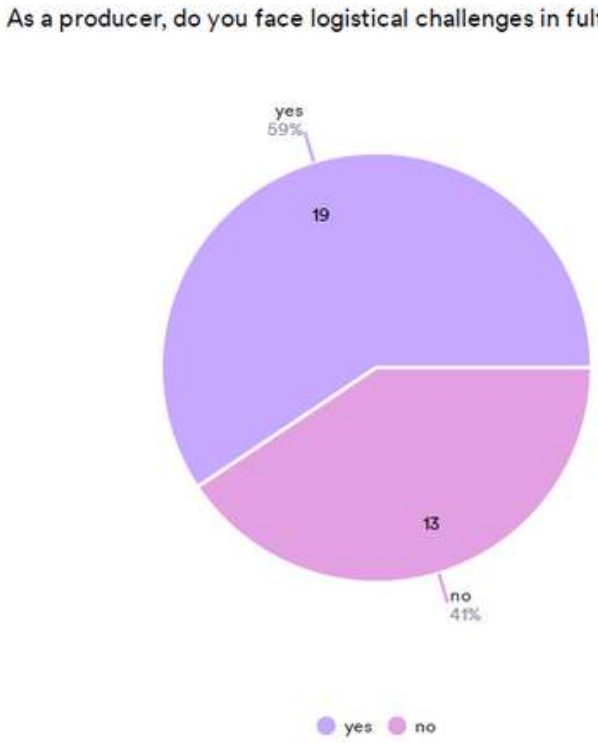
Graph 27.
Buyers' Expectations

The following 3 graphs delved into external challenges of the producers that are designed to encompass and address administrative and regulatory constraints as well as logistical intricacies involved in order processing and delivery. The data shows that a vast majority of producers (84%) grappled with legal and administrative impediments when fulfilling orders. On the other hand, a smaller but still notable proportion of producers (59%) cited logistical complications that may span a range of issues, from coordinating with shipping partners and optimising transportation routes to managing inventory effectively. All these factors play a pivotal role in ensuring that products reach buyers promptly. Moreover, a significant segment of producers (72%) articulated concerns over lead time and delivery discrepancies with adhering to delivery schedules.



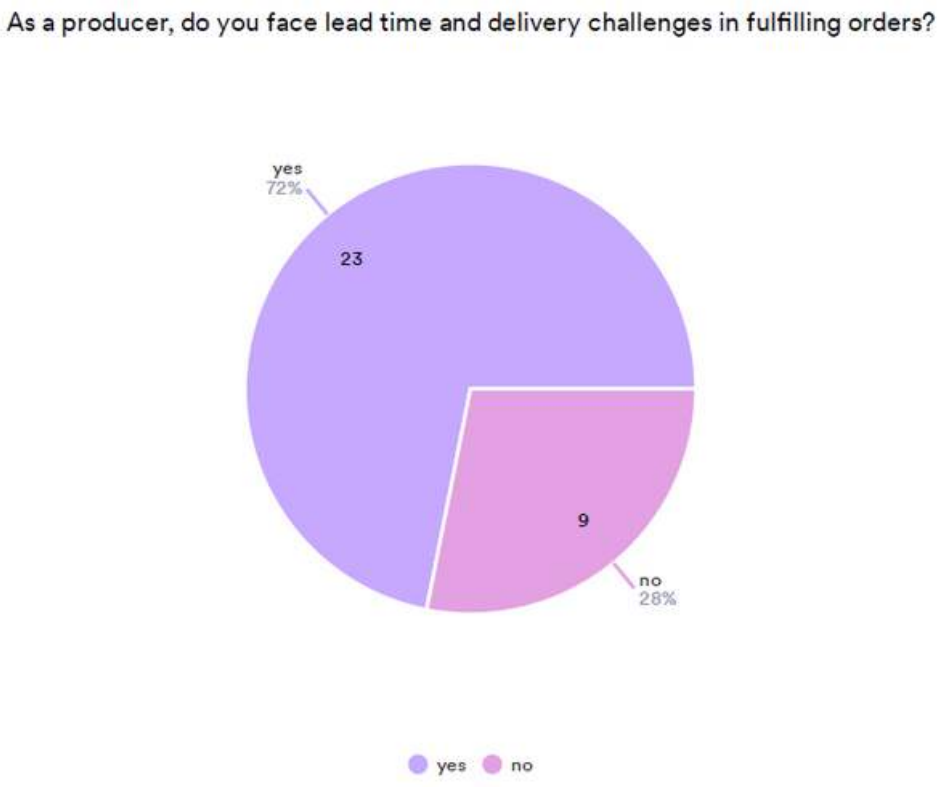
Graph 28.
Administrative and Legal Challenges that Producers Encountered

Producer Responses - 32 Producers



Graph 29.
Logistical Challenges that Producers Encountered

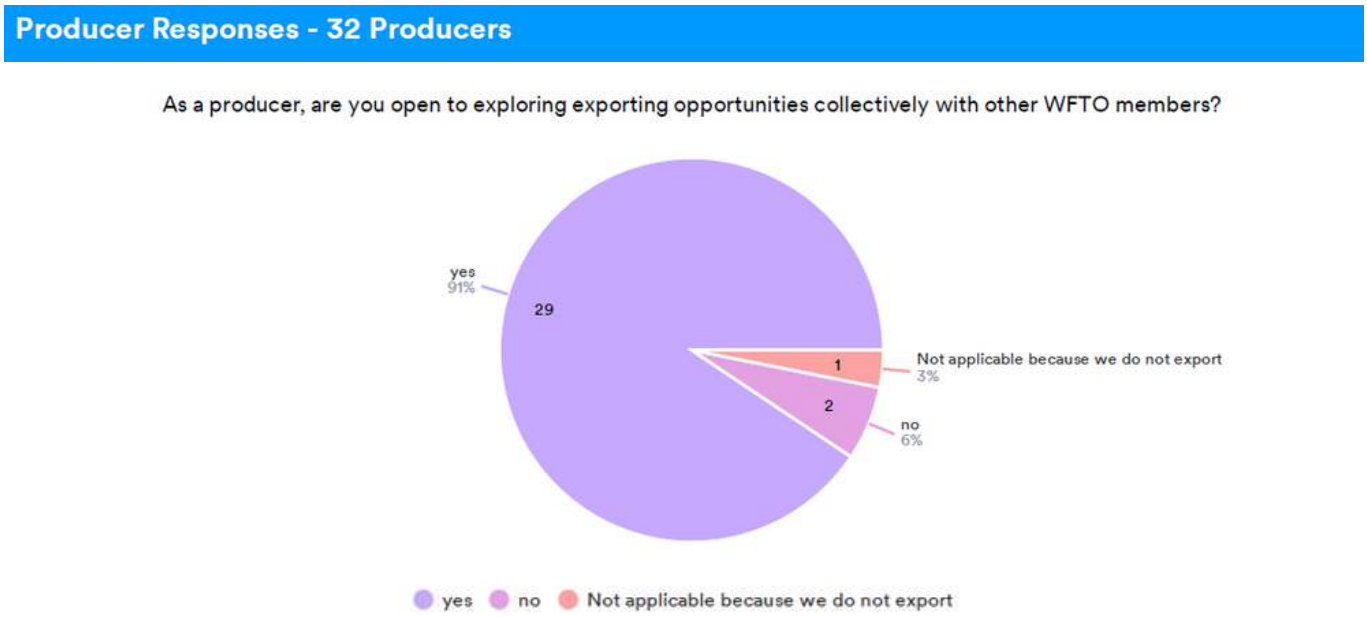
Producer Responses - 32 Producers



Graph 30.
Time and Delivery Challenges that Producers Encountered

When it comes to collaboration, the following 2 graphs show clear willingness on the part of the respondents to act together and or engage in sharing experiences. A vast majority of producers (91%) expressed their openness to collectively explore exporting opportunities with other World Fair Trade Organization (WFTO) members. Conversely, only a small proportion of producers (6%) stated that they are not interested in exploring exporting opportunities collectively, while an additional 3% mentioned that this aspect is not applicable to them as they do not engage in exporting. Despite this minority, the positive response from the majority reflects a positive outlook on collaborative ventures for mutual benefit within the Fair Trade ecosystem.

Moreover, an equal proportion of producers (91%) also indicated their willingness to share their experiences and successful practices in exporting with other experienced WFTO members highlighting a culture of knowledge sharing and peer support within the community of producers.

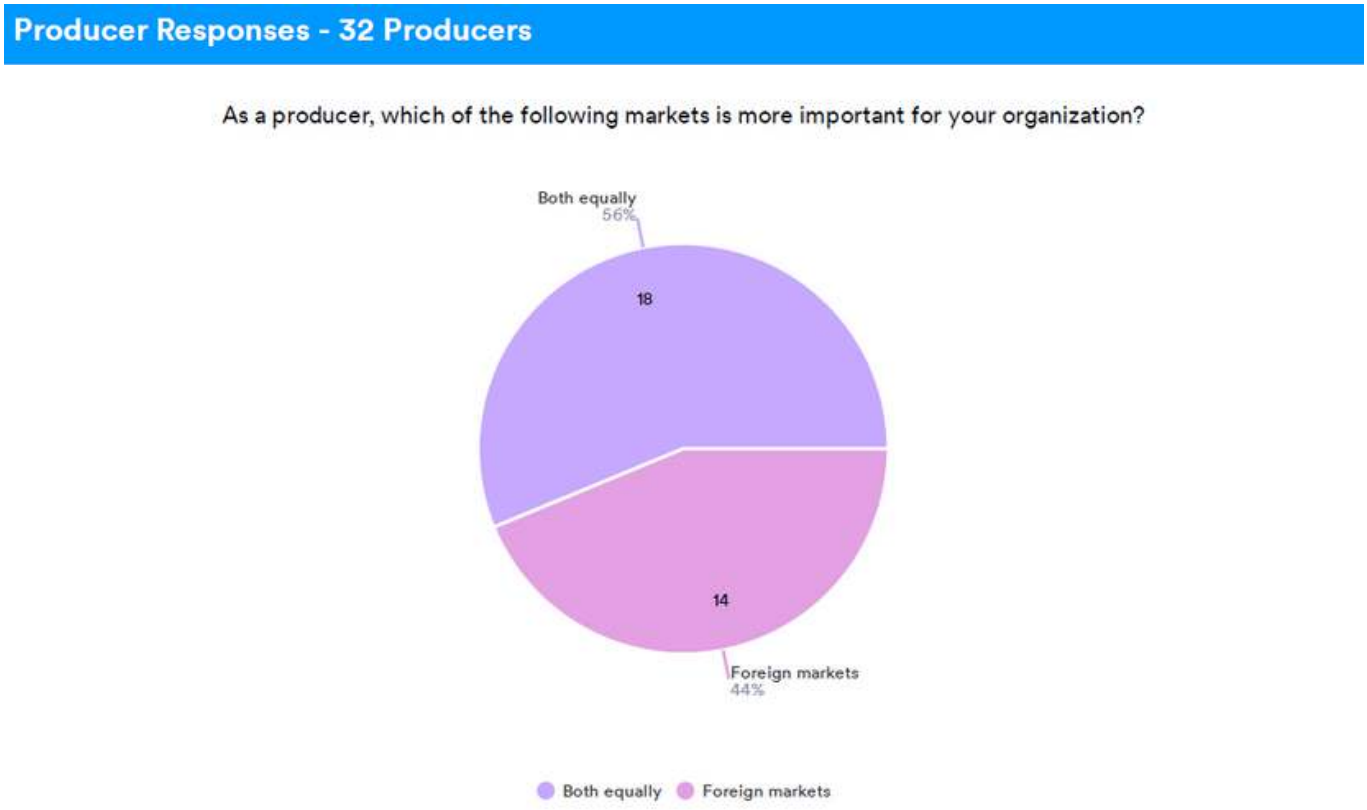


Graph 31.
Exporting Openness of Producers

Graph 32.
Sharing Experiences and Successful Practices of Producers

Following graph is an explanation of varying priorities of Fair Trade producers regarding their target markets. A considerable proportion of producers (56%) indicated that they give equal importance to both the domestic and foreign markets. This balanced approach suggests that these producers recognise opportunities and demand in both local and international settings, and they aim to maintain a presence in both markets. On the other hand, a notable proportion of producers (44%) expressed a clear preference for focusing on foreign markets. The contrasting responses between the two groups of producers highlight the diversity of strategies and market orientations within the Fair Trade community. While some prioritise the local market and maintain a global presence, others are keen on expanding primarily in foreign markets.

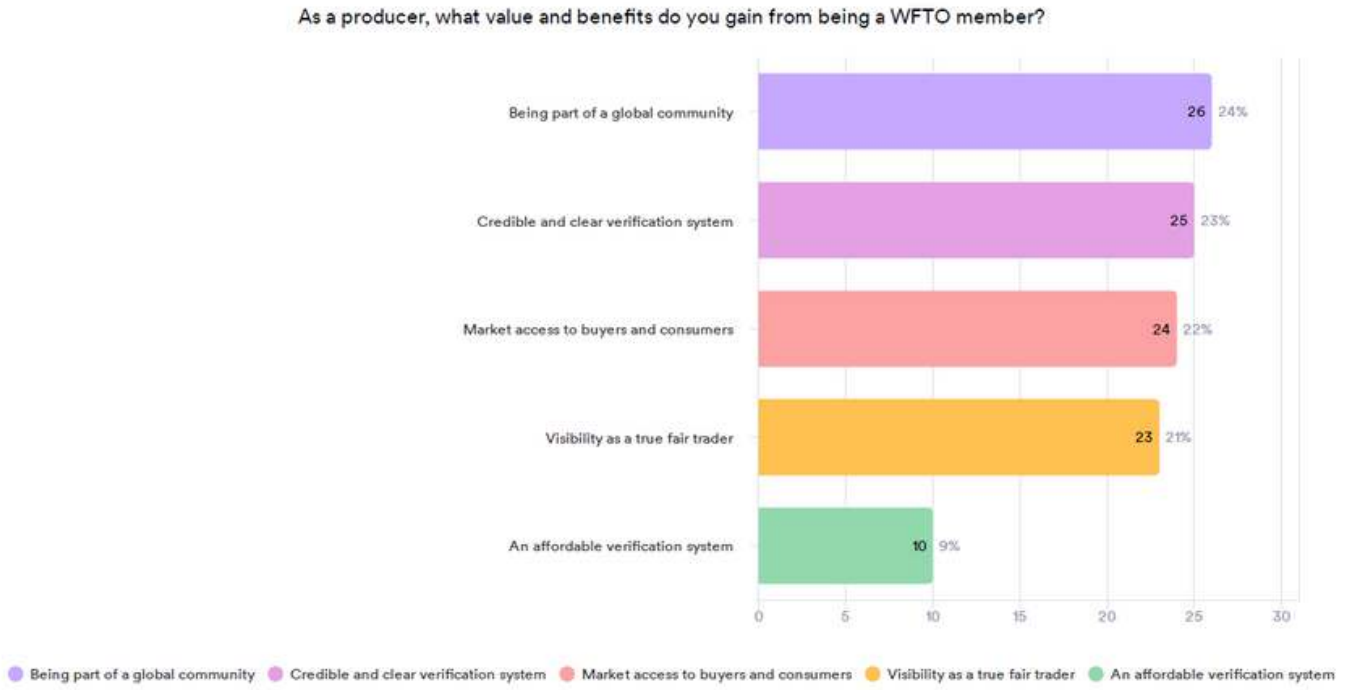
It is noteworthy that none of the participants chose the option presented only for domestic markets. The lack of interest in the domestic market option suggests that these producers may perceive greater potential for growth and impact in international trade, possibly due to the higher demand for Fair Trade products in foreign markets or the desire to promote Fair Trade principles globally.



Graph 33.
Importance of Markets for Producers

The following graph demonstrates that Fair Trade producers perceive approximately equal gains from being a World Fair Trade Organization (WFTO) member when it comes to certain benefits. These benefits include being part of a global community, involvement in a credible and clear verification system, enhanced market access to buyers and consumers, and increased visibility as a fair trader. However, only a small proportion (10%) expressed their contentment about the affordability of the verification system, hinting at potential financial challenges that may hinder application of potential members to WFTO.

Producer Responses - 32 Producers



Graph 34.
Values and Benefits of Producers Gained from Being a WFTO Member

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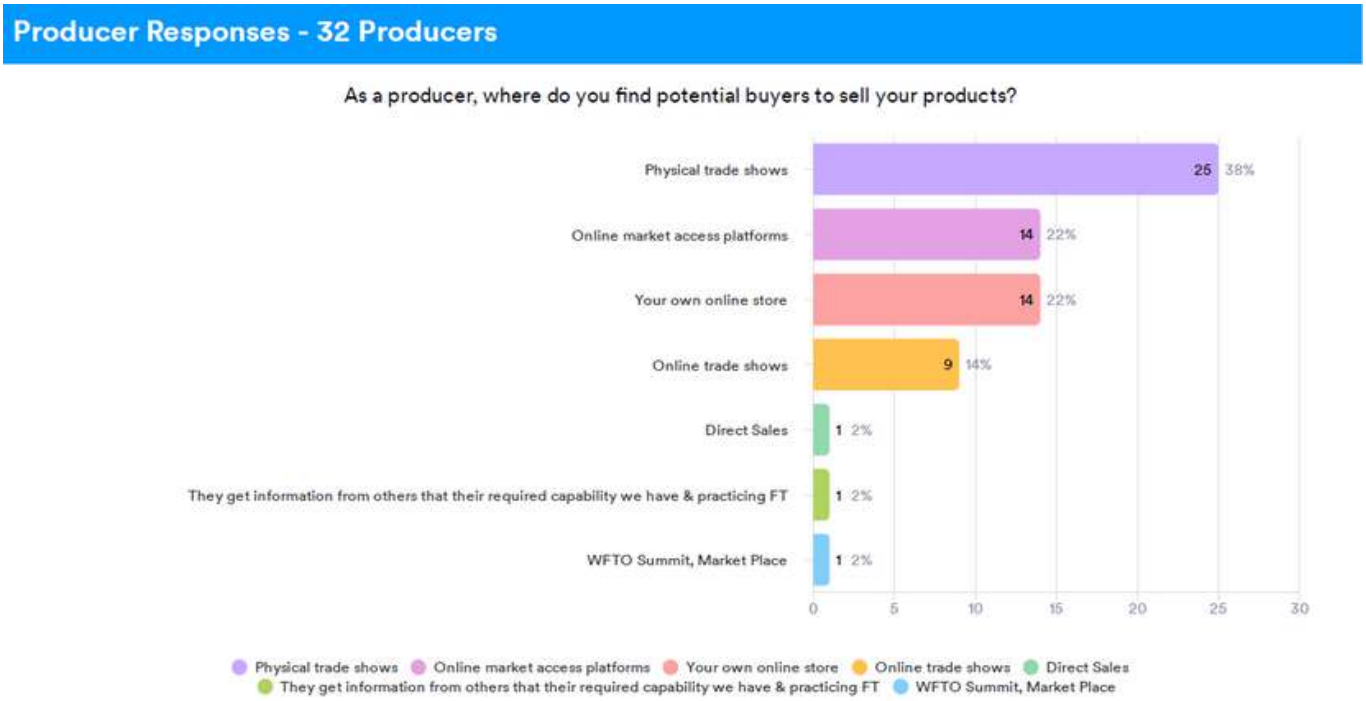
The bar chart displays which channels through which producers find potential buyers to sell their products as World Fair Trade Organization (WFTO) members. As an outcome of the survey, physical trade shows emerge as the most commonly mentioned space, with 38% of producers expressing this option as the most prominent one. In addition to this, online market platforms and online stores are equally popular, with 22% of producers each opting for these digital avenues. Additionally, there is a significant utilisation of online trade shows, accounting for 14% of producers' sales strategies, indicating a growing interest in virtual events and digital marketing.



Graph 35.
The Channels of Producers Where They Found Their Potential Buyers

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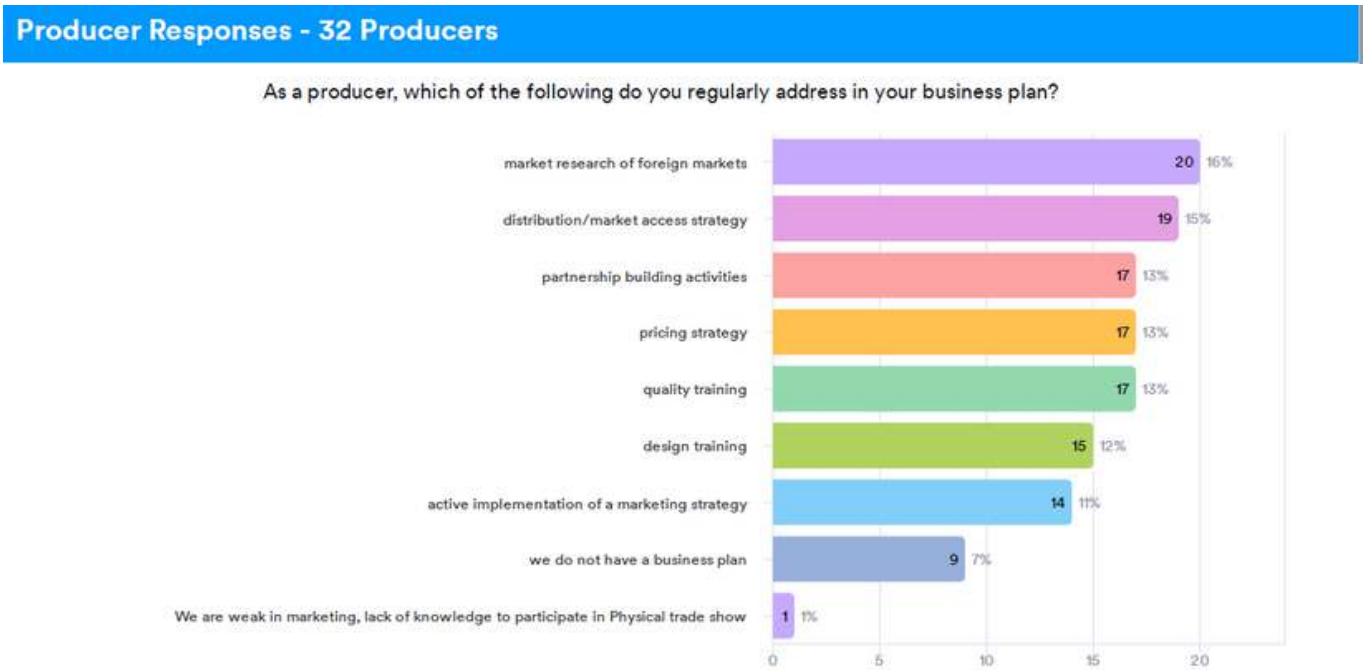
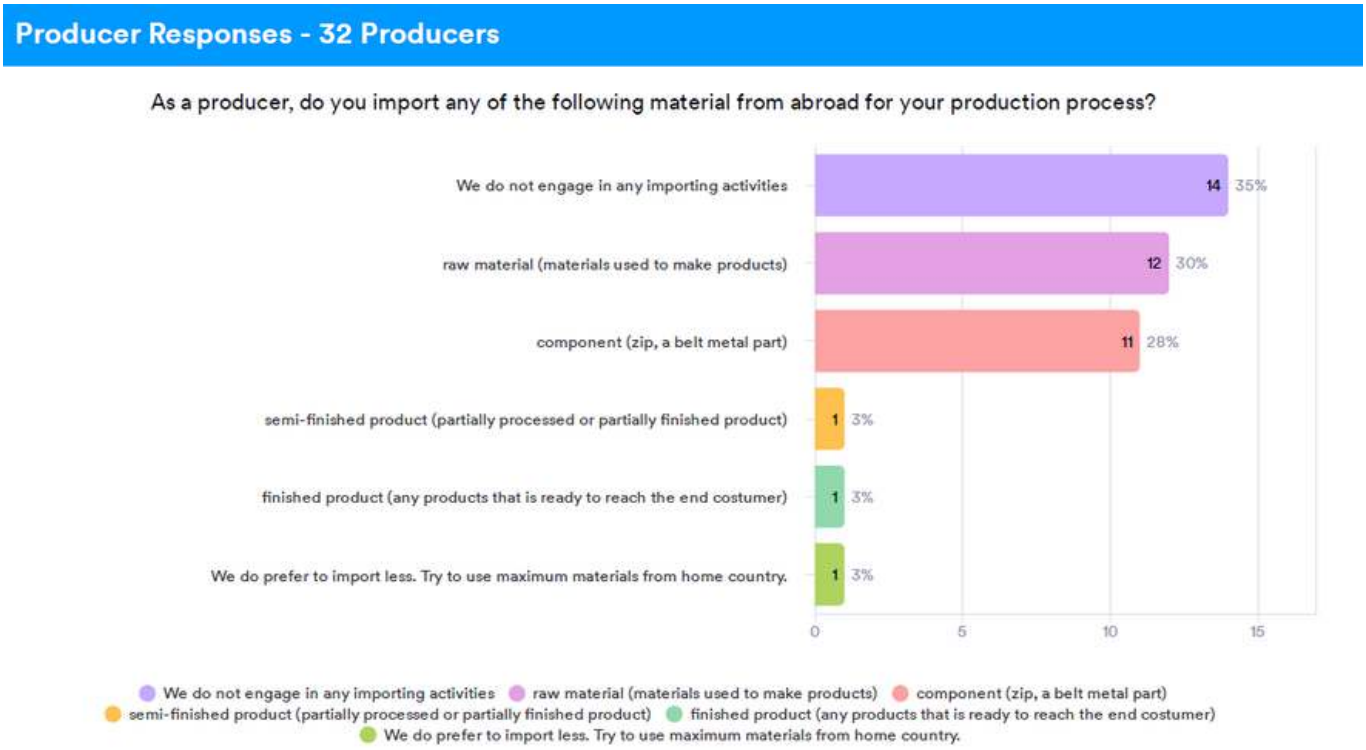
The graph labeled as 36 provides insights into the fundamental components that producers commonly incorporate into their business plans and they underscore the paramount importance of comprehensive market research and effective distribution strategies when formulating successful business plans for Fair Trade producers. Notably, foreign market research (16%) and distribution/market strategy (15%) stand out as crucial aspects. Partnership activities, pricing strategy, and design training closely follow, each being addressed by 13% of producers.



Graph 36.
Resources of Producers for Addressing Their Business Plans

The bar chart below shows the importing activities pertaining to different materials utilised in the production processes of Fair Trade producers, encompassing both raw materials for product manufacturing and components. Among the surveyed participants, a notable majority (35%) indicated their non-engagement in any importing activities, signifying a significant proportion of producers reliant on locally sourced materials. Meanwhile, 30% of producers reported the import of raw materials, underscoring the significance of global supply chains for specific products needed for the production processes. Moreover, 11% of respondents indicated the import of other components, implying the necessity to incorporate international purchasing activities within their production processes.



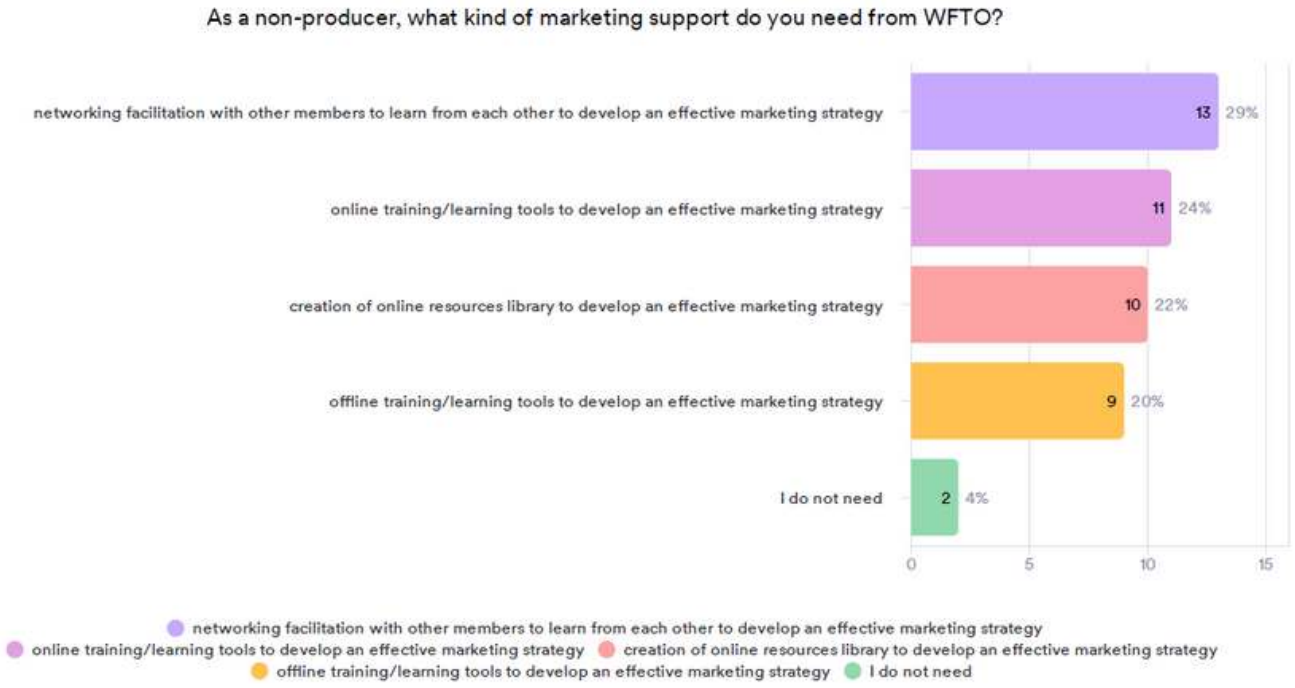
Graph 37.
Importing Materials of Producers for Production Process

B. Responses of 16 Non-Producers

This section of the report below contains the responses of 16 non-producers to the survey. The graphics that are related to each other, according to the content of the questions, are indicated as follows with their explanations.

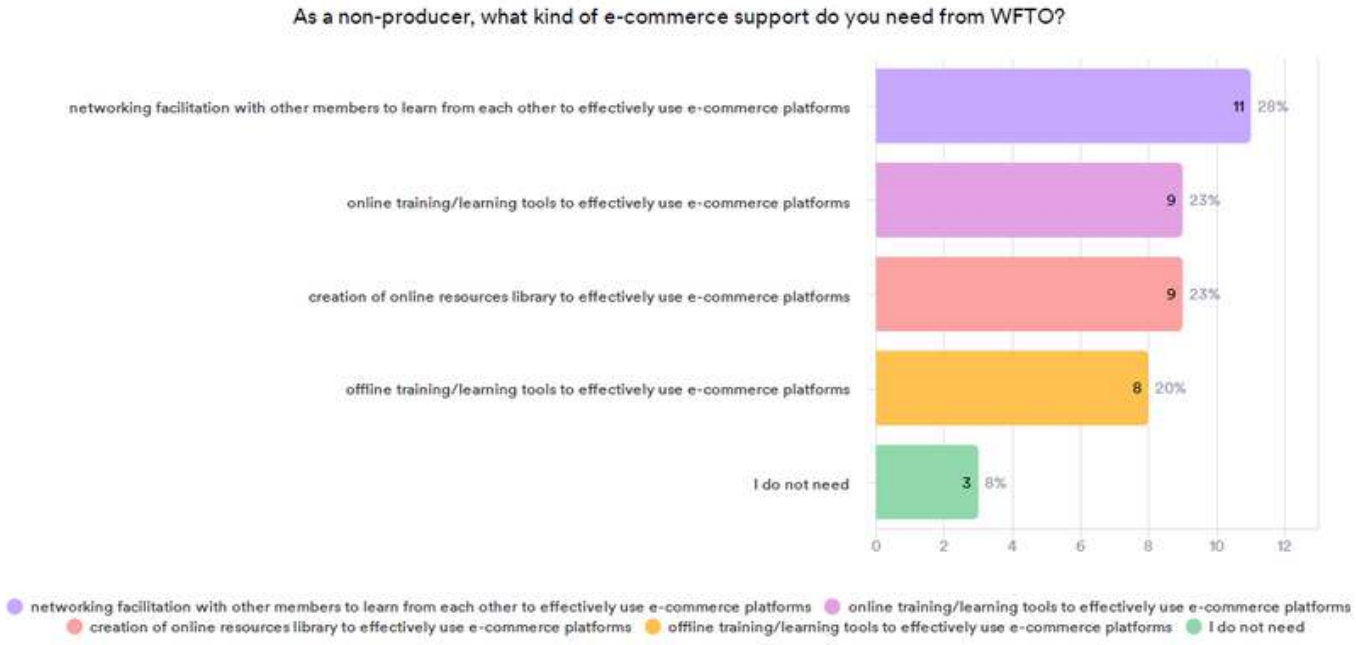
The following three graphs highlight the fundamental needs of non-producers concerning marketing, e-commerce, and design support from the World Fair Trade Organization (WFTO). Based on these three graphs, networking facilitation with other members stands out as a crucial requirement for both marketing(29%) and e-commerce (28%), indicating the significance of collaboration within the Fair Trade community for non-producers. Additionally, online training and learning tools are consistently sought after for both marketing and e-commerce, underscoring the importance of digital skills and knowledge acquisition. In contrast, design support responses are equally emphasising online tools and networking facilitation as primary issues to be addressed in this regard.

Non-producer Responses -- 16 non-producers



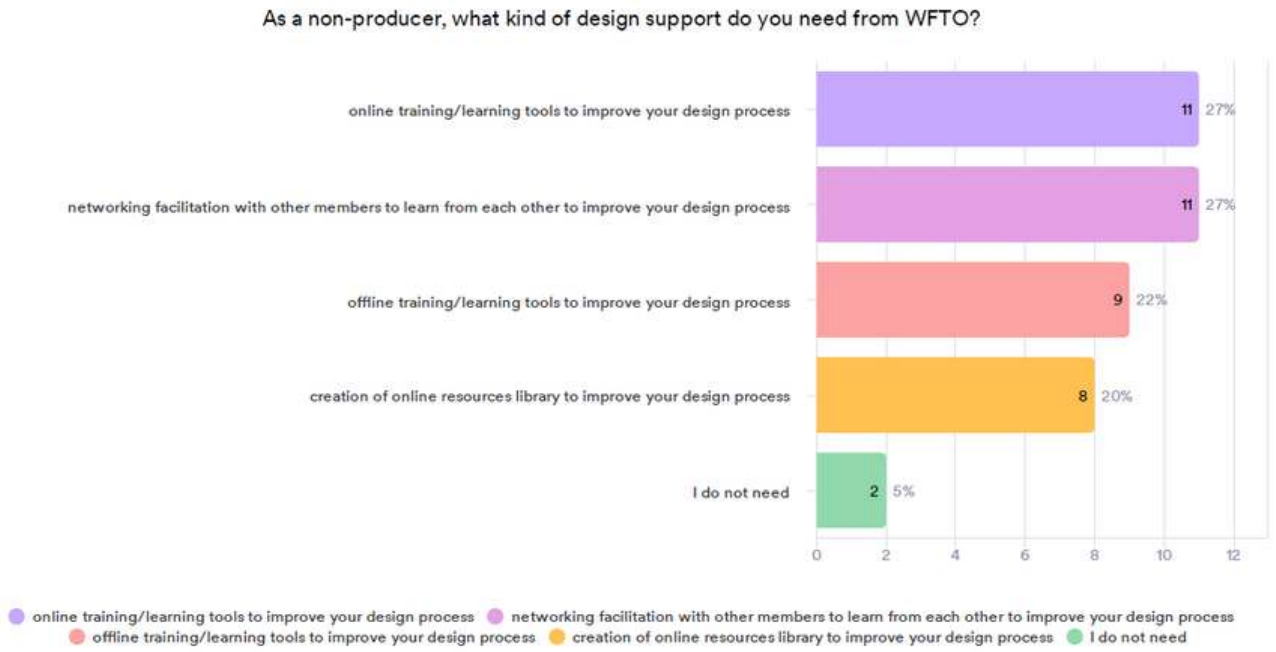
Graph 38.
Marketing Support Requirements of Non-Producers

Non-producer Responses -- 16 non-producers



Graph 39.
E-Commerce Support Requirements of Non-Producers

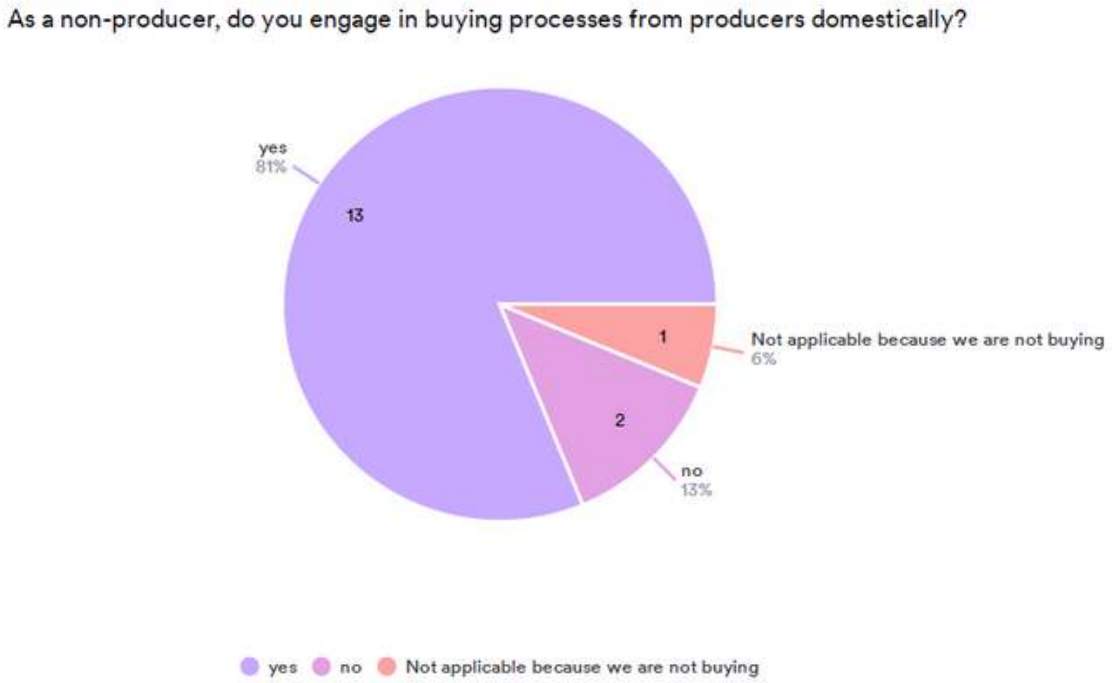
Non-producer Responses -- 16 non-producers



Graph 40.
Design Support Requirements of Non-Producers

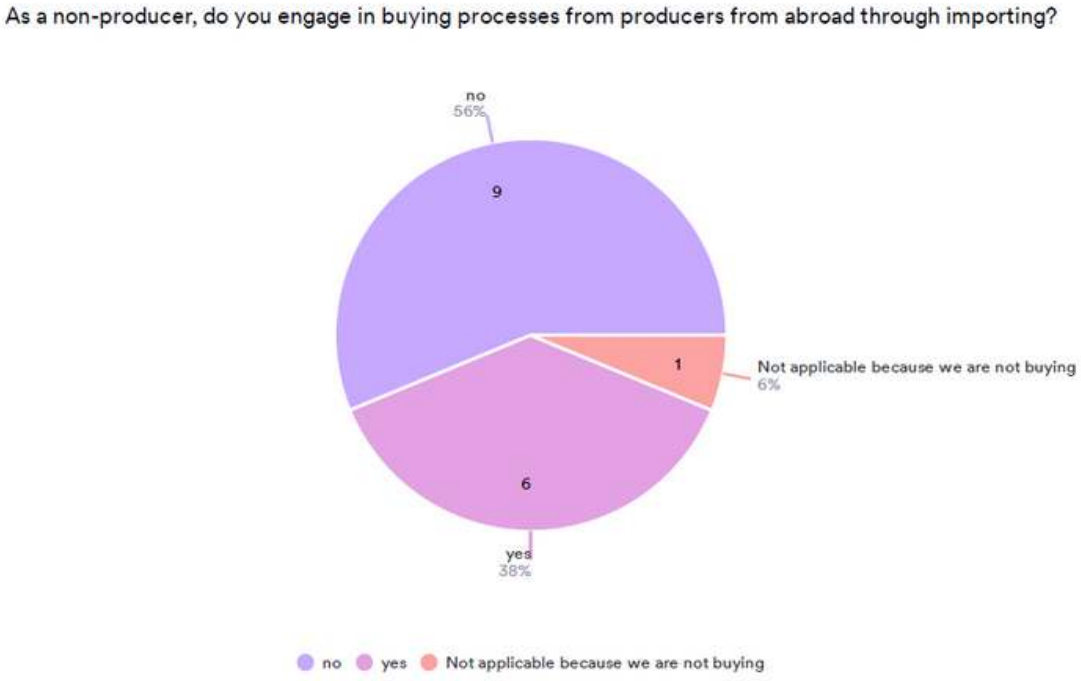
The following three graphs display the export and import data of the 16 non-producers. According to the survey results, the majority of participants (81%) stated that they are effectively engaging with purchasing processes with local producers. However, in procurement processes involving foreign manufacturers, it was found that they are involved with them with a lower capacity than the domestic ones (56%). Furthermore, a significant percentage of non-producer participants (88%) indicated being engaged with exporting processes in their business operations. These findings suggest the strong capability of non-producers in handling local purchasing and exporting activities, while also highlighting a lower engagement with foreign manufacturers in their purchasing activities.

Non-producer Responses -- 16 non-producers



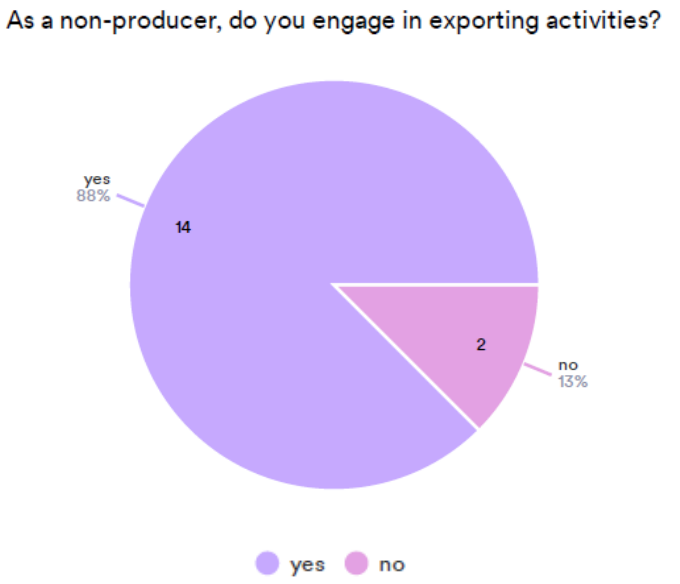
Graph 41.
Procurement Engagement of the Non-Producers from Domestic Producers

Non-producer Responses -- 16 non-producers



Graph 42.
Procurement Engagement of the Non-Producers from Producers Abroad

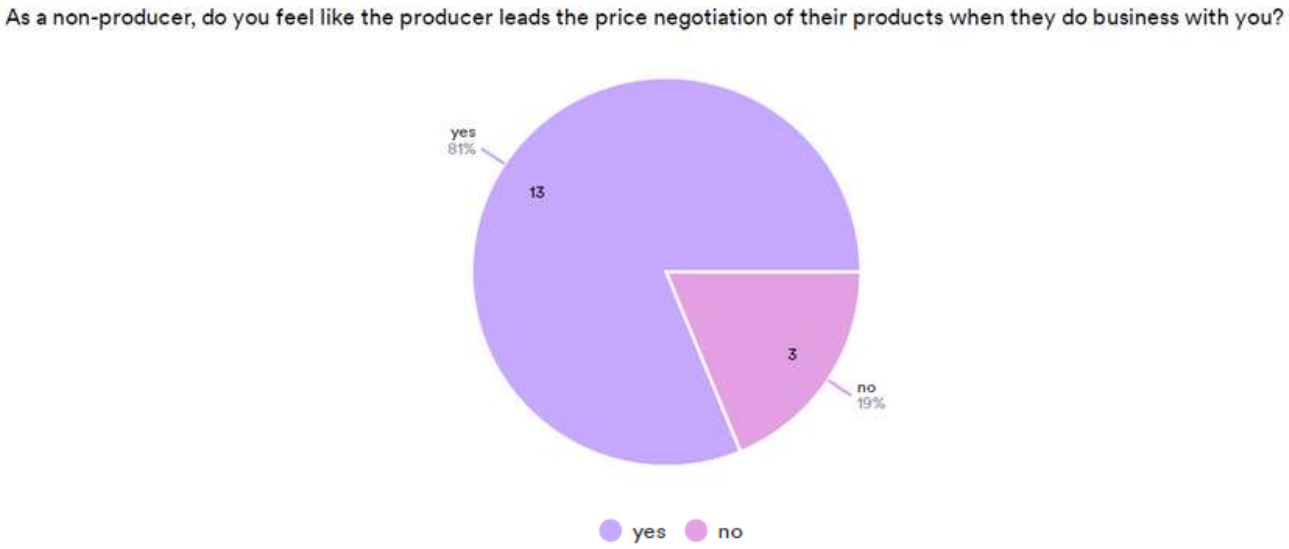
Non-producer Responses -- 16 non-producers



Graph 43.
Engagements in Exporting Activities of Non-Producers

Among non-producers, a high proportion (81%) feel confident in leading price negotiations with producers, while an equal percentage (81%) provide prepayments to producers before initiating the production process. Additionally, almost an overwhelming majority of the participants (94%) indicated that they provide guidelines to producers concerning product service, quality, and other variations, showcasing their proactive approach in upholding Fair Trade principles and maintaining consistent standards.

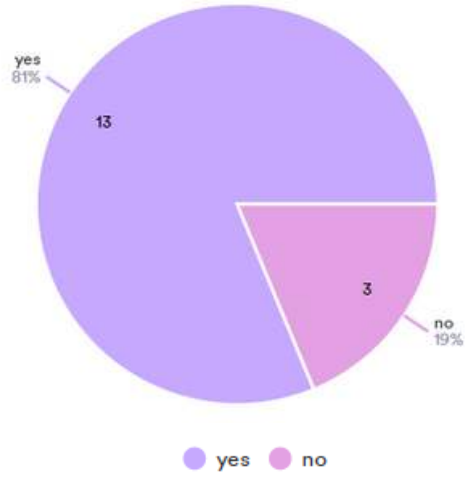
Non-producer Responses -- 16 non-producers



Graph 44.
Non-Producers' Price Negotiations with Producers

Non-producer Responses -- 16 non-producers

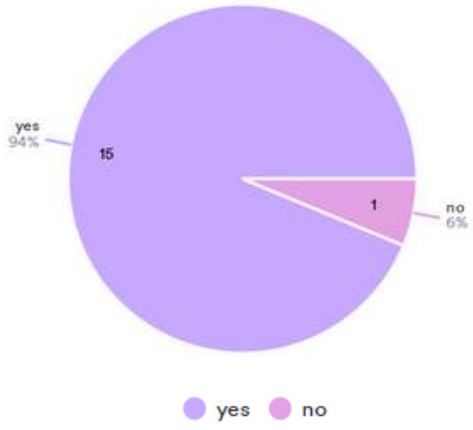
As a non-producer, do you generally provide pre-finance (pre-payment) to the producers before they start production?



Graph 45.
Non-Producers' Pre-Finance Provision to Providers

Non-producer Responses -- 16 non-producers

As a non-producer, do you provide any guidelines to the sellers about your expectations from them regarding service, quality, order volume, allowed variations in products for color etc.?



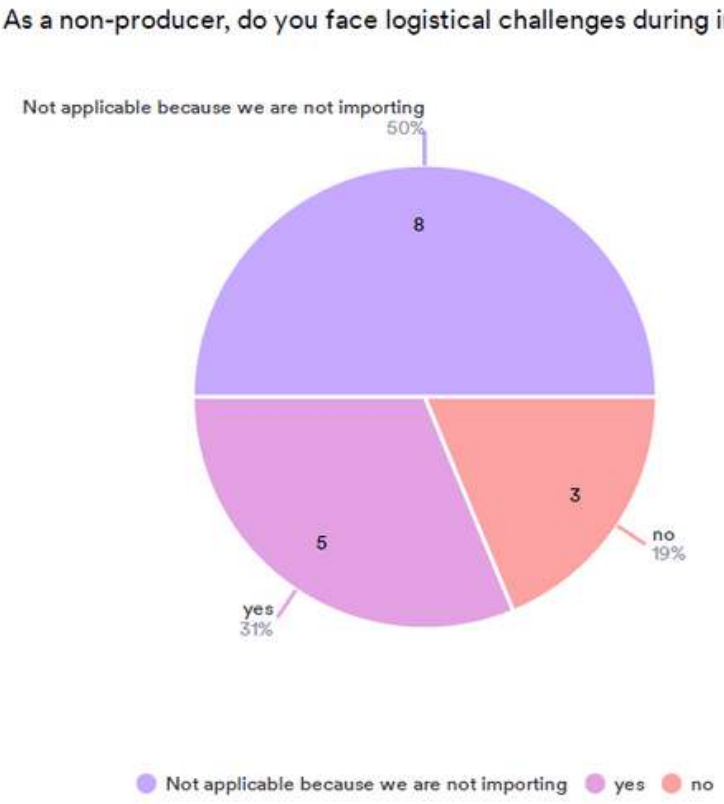
Graph 46.
Providing Expectations with Guidelines of Non-Producers

The two graphs below address the legal, administrative, and logistical problems encountered by 16 non-producing participants during the importing process.Notably, half of the participants do not engage in importing activities, resulting in "N/A" responses to the question. For the remaining half, their problematic experiences in importing showed an equal proportion of negative and positive responses. Regarding logistical problems, the absence of import activities led to a slightly higher proportion (31%) of participants facing such issues. However, the lack of import activities in both graphs limits the possibility of making definitive interpretations about these challenges. Despite this limitation, the graphs shed light on the complexities that non-producers may encounter during the importing process, emphasising the need for further exploration and understanding to facilitate smoother import operations in Fair Trade practices.

Non-producer Responses -- 16 non-producers

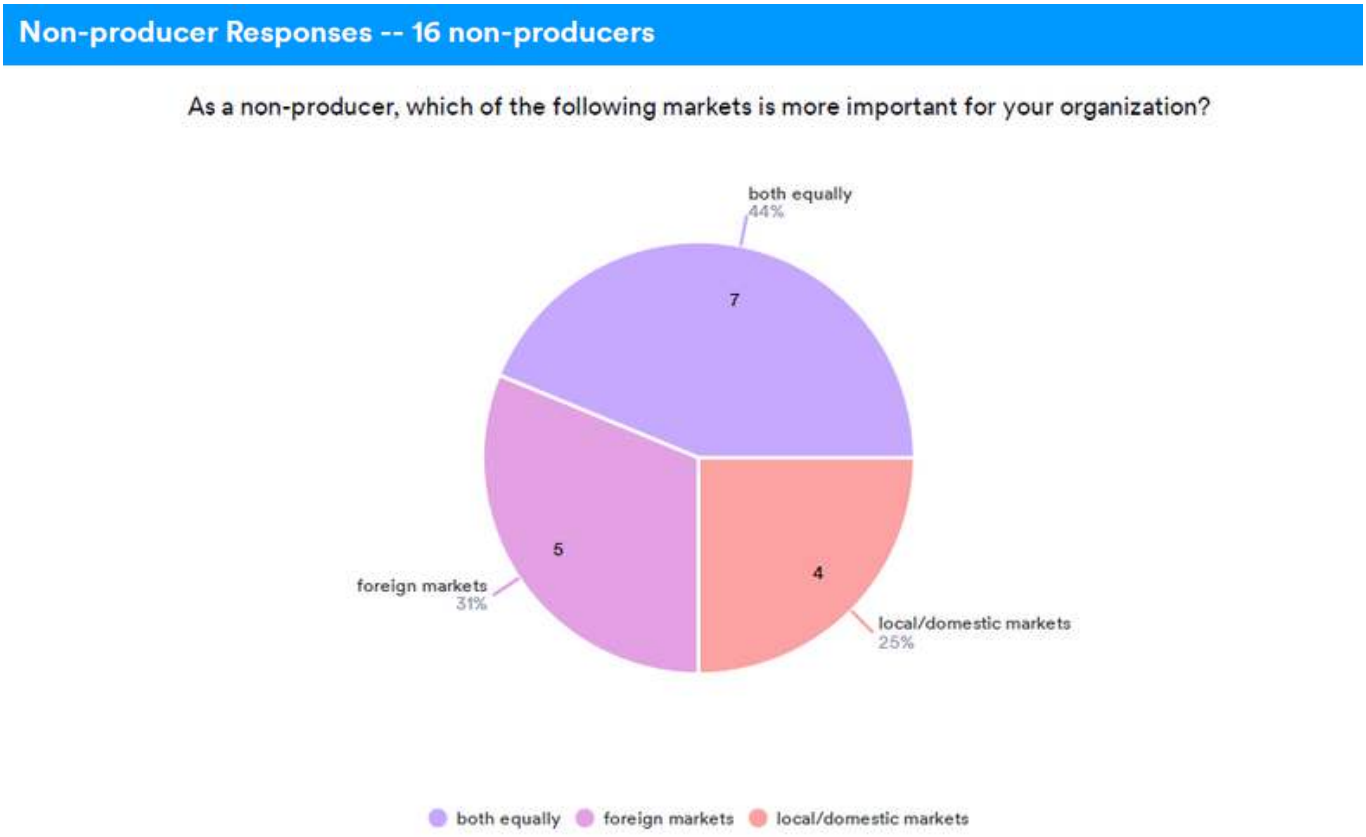
Graph 47.
Administrative and Legal Challenges Faced by Non-Producers in Importing Activities

Non-producer Responses -- 16 non-producers



Graph 48.
Logistical Challenges Faced by Non-Producers in the Importing Activities

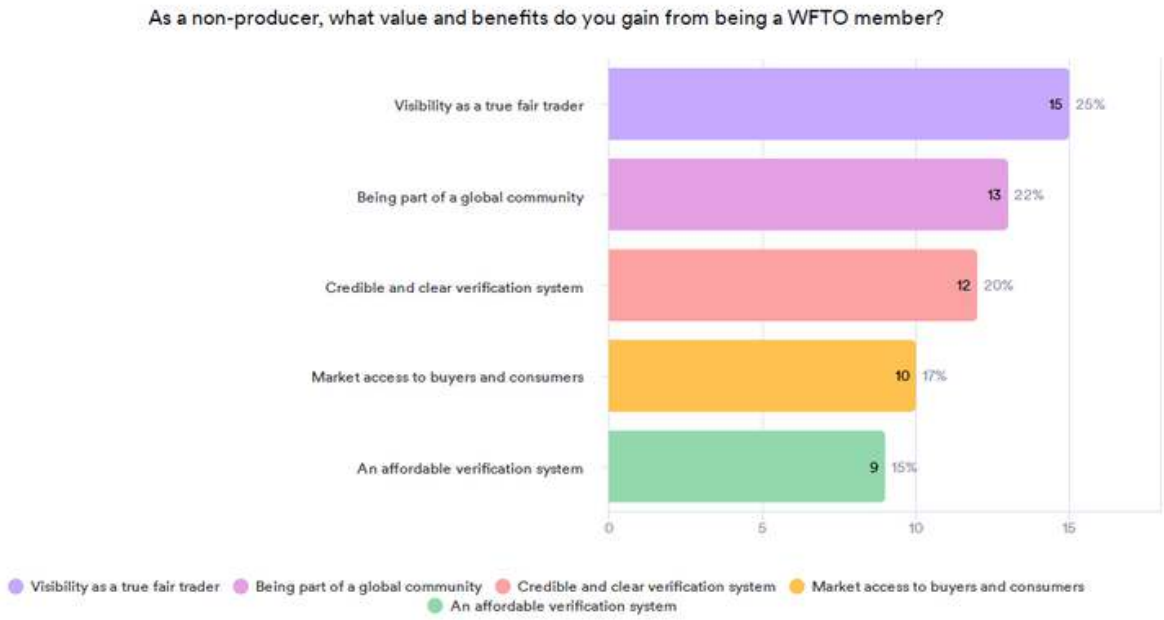
Moreover, according to the responses of non-producing participants, both foreign markets and local markets hold equal importance for 44% of them, while 31% consider foreign markets and 25% prioritise local markets. These findings indicate that a significant proportion of non-producers value both foreign and local markets equally, recognising the potential benefits and opportunities that each market offers. However, a notable segment still shows a preference for either foreign or local markets, suggesting diverse strategic approaches in their business operations.



Graph 49.
Market Importance for Non-Producers: Foreign vs. Local Markets

Finally, in the survey non-producing participants stated that as WFTO members, they gain significant visibility as a true fair trader, become part of a global community, and benefit from a credible and transparent verification system in a similar capacity. Moreover, they believe that WFTO membership substantially enhances access to buyers and consumers. Finally, 15% of the participants expressed that the verification system is affordable.

Non-producer Responses -- 16 non-producers

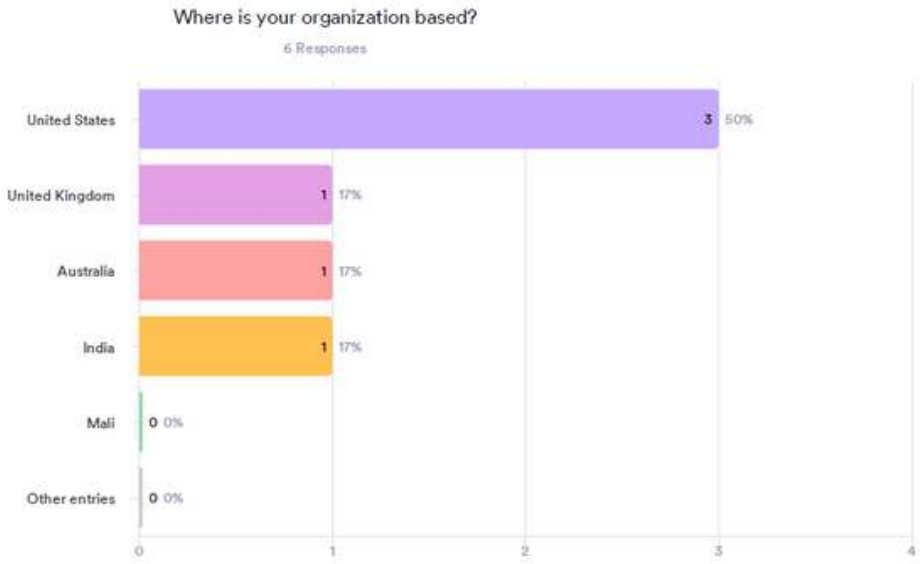


Graph 50.
Perceived Benefits of WFTO Membership for Non-Producers

C. External Buyers

This part of the report was prepared based on the answers of external buyers and brands. The participants were reached via the Common Objective platform and the Fair Trade Conference held in California in March 2023. Notably, 50% of these external brands and buyers are based in the United States and the remaining participants are equally distributed among the United Kingdom, Australia, and India.

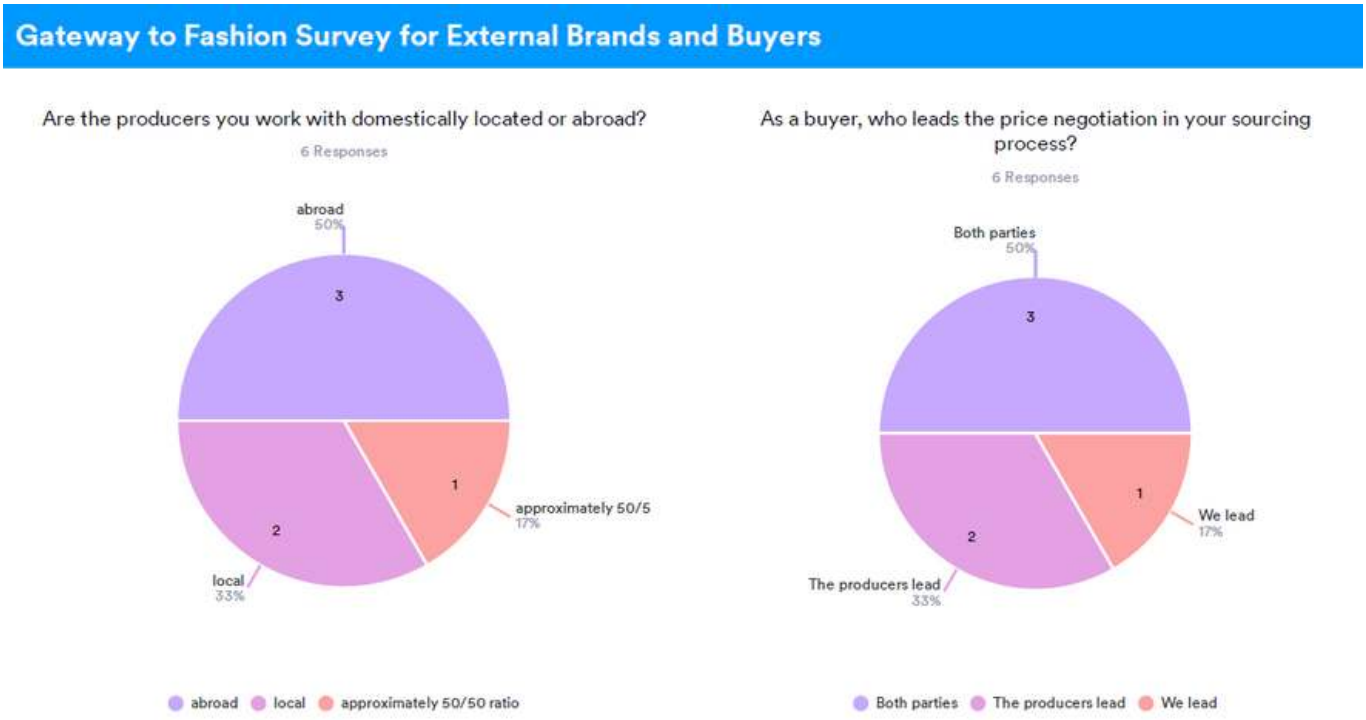
Gateway to Fashion Survey for External Brands and Buyers



Graph 51.
Country Distribution of External Brands and Buyers

Graph 52 illustrates the distribution of producers for external brands with whom buyers primarily work. 50% of the producers of buyers are located abroad. In contrast, 33% of buyers work with local producers and 17% work with a mix, evenly split between local and international producers. It should be noted that the significant cumulative percentage of buyers working with local producers underscores the relevance of local supply chains.

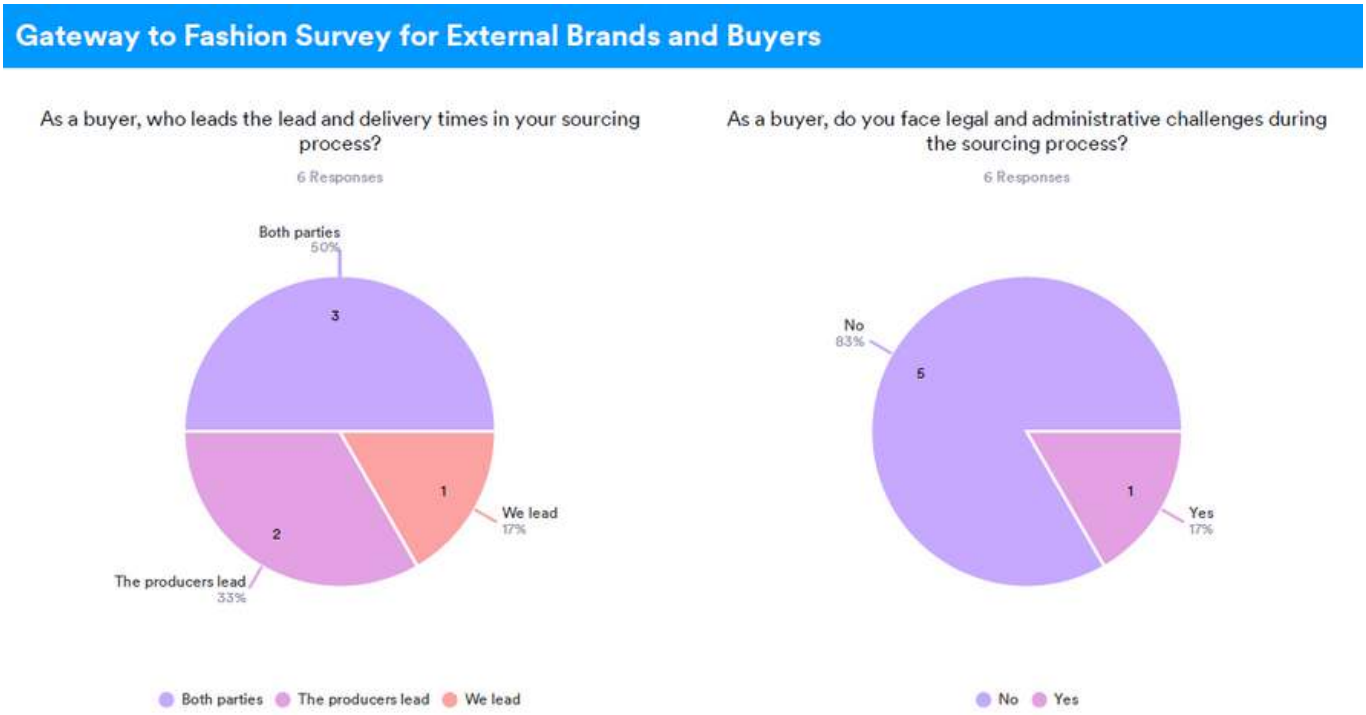
Furthermore, the graph on the right shows how sourcing processes are negotiated and it shows a balance of power, with decision-making often shared. In 50% of the cases, decision-making is shared equally by both parties. However, in 33% of the situations, producers lead the negotiations, while in 17% of the instances, buyers have the dominant role.



Graph 52.
Distribution of Producers for External Brands and Buyers

Graph 53.
Negotiation Dynamics in Sourcing Processes between External Brands/Buyers and Producers

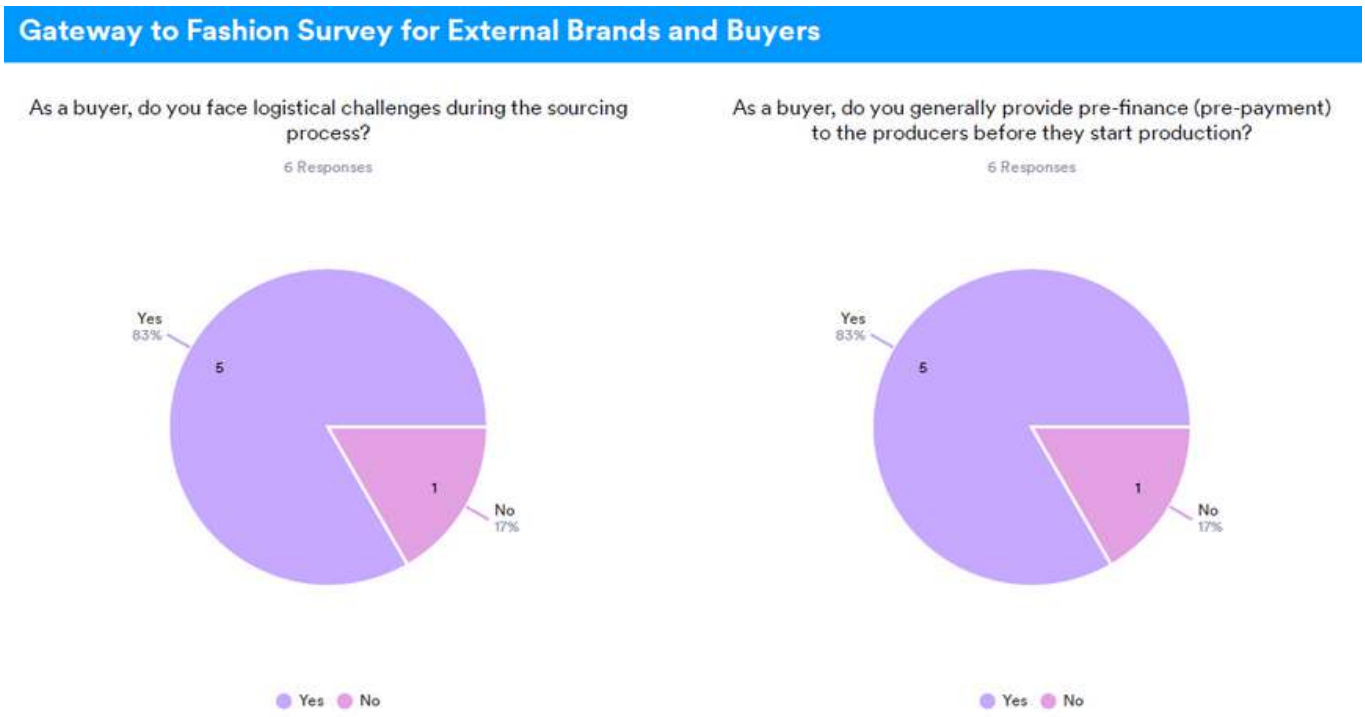
Following graph presents an insight into the leadership in setting delivery times and the legal and administrative challenges that external brands and buyers encounter during their sourcing processes. According to the gathered responses, 50% of participants share the responsibility of setting delivery times equally, with 33% of the process being led by producers and 17% by buyers. Interestingly, a significant majority of buyers (83%) have reported that they did not face any legal or administrative challenges during the sourcing process.



Graph 54.
Leadership in Setting Delivery Times

Graph 55.
Legal and Administrative Challenges

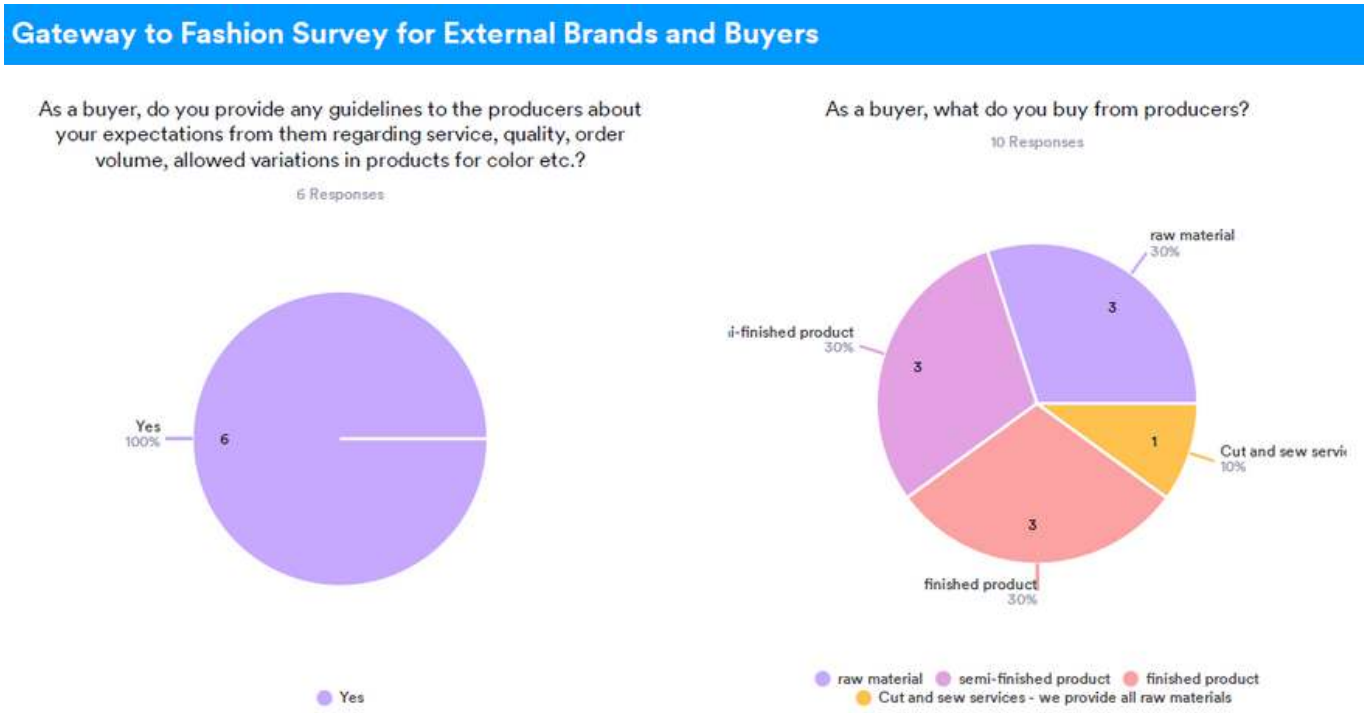
As shown in the below graphs, buyers were also surveyed about their experiences with logistical issues during the sourcing process and their prepayments to manufacturers prior to production initiation. Accordingly, it was revealed that a significant majority (83%) has a smooth sourcing, reporting no logistical problems. The same proportion of buyers (%83) makes prepayments to producers before production commences as well.



Graph 56.
Logistical Issues Faced by Buyers during the Sourcing Process

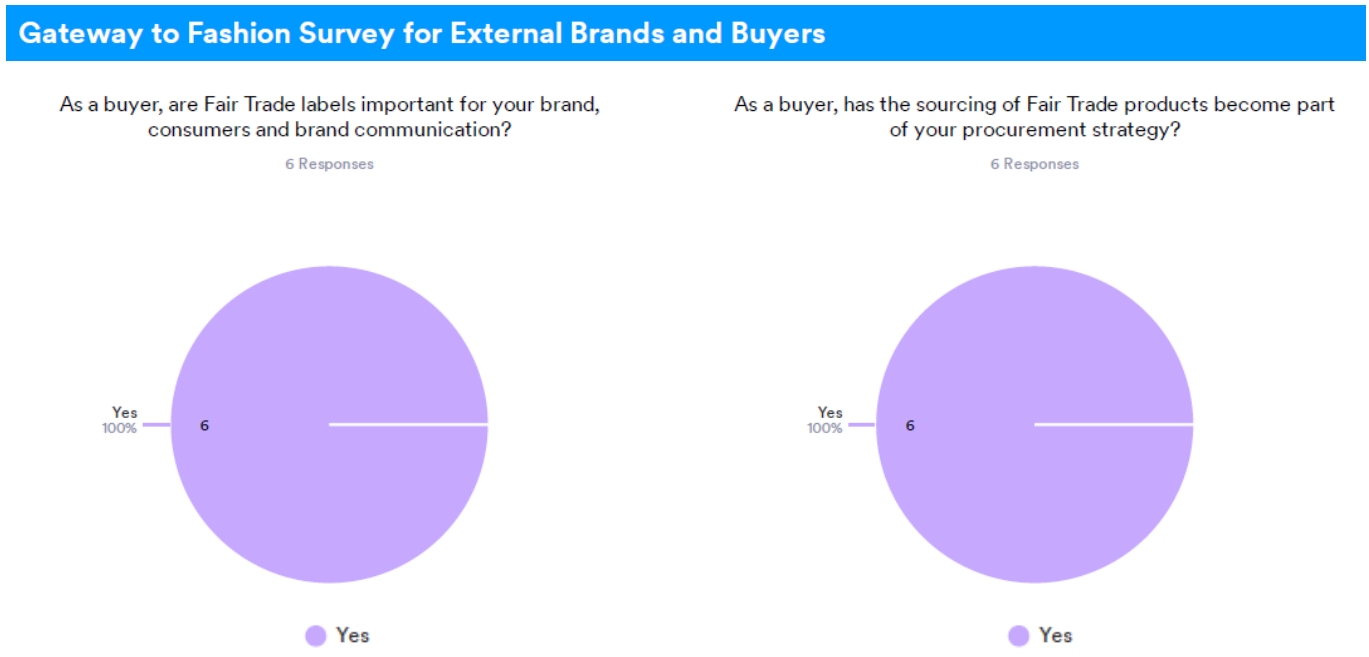
Graph 57.
Prepayment Practices of Brands and Buyers to Producers before Production Initiation

As shown in the below graphs, buyers were also surveyed about their experiences with logistical issues during the sourcing process and their prepayments to manufacturers prior to production initiation. Accordingly, it was revealed that a significant majority (83%) has a smooth sourcing, reporting no logistical problems. The same proportion of buyers (%83) makes prepayments to producers before production commences as well.



Graph 58.
Guidelines Shared by Brands and Buyers with Producers for Expectations and Purchases

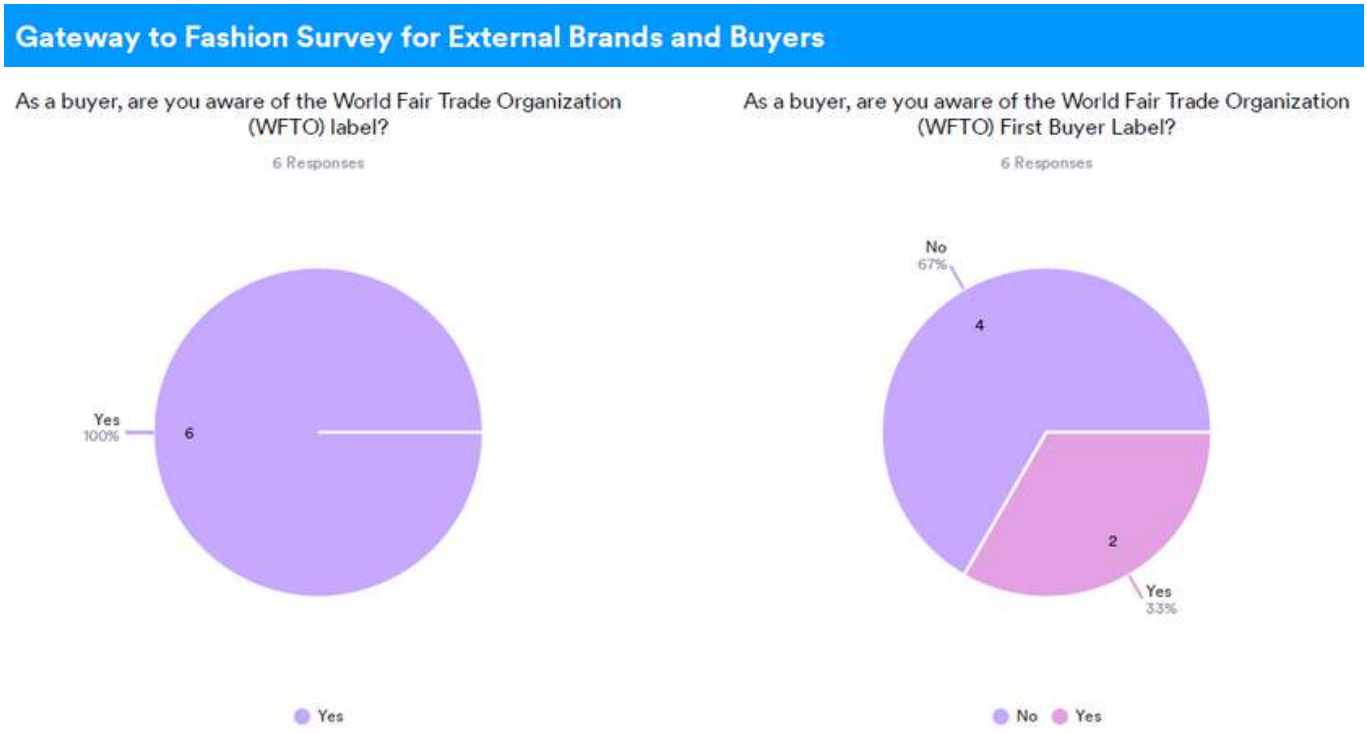
Graph 59.
Proportion of Products Procured by Brands and Buyers at Different Production Stages from Producers



Graph 60.
Importance of Fair Trade Label in Brands' and Buyers' Procurement Decisions

Graph 61.
Impact of Fair Trade Label on Brands' and Buyers' Procurement Strategies for Fair Trade Products

Complementing the earlier responses, it was found that all participants were aware of the WFTO (World Fair Trade Organization) label. However, a significant majority (67%) did not possess substantial knowledge of the First Buyer Label. This finding demonstrates the broad recognition of the WFTO label among buyers, whereas understanding of the First Buyer Label is less pervasive, indicating a need for potential improvement areas for awareness.

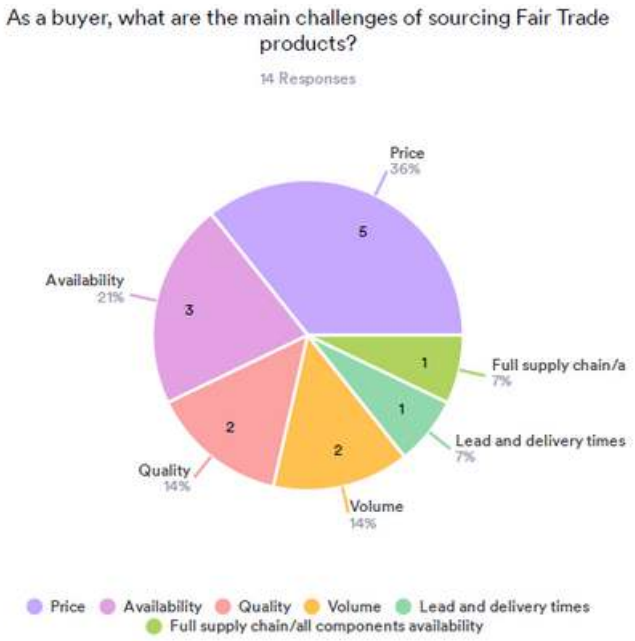


Graph 62.
Awareness of WFTO (World Fair Trade Organization) Label among Brands and Buyers

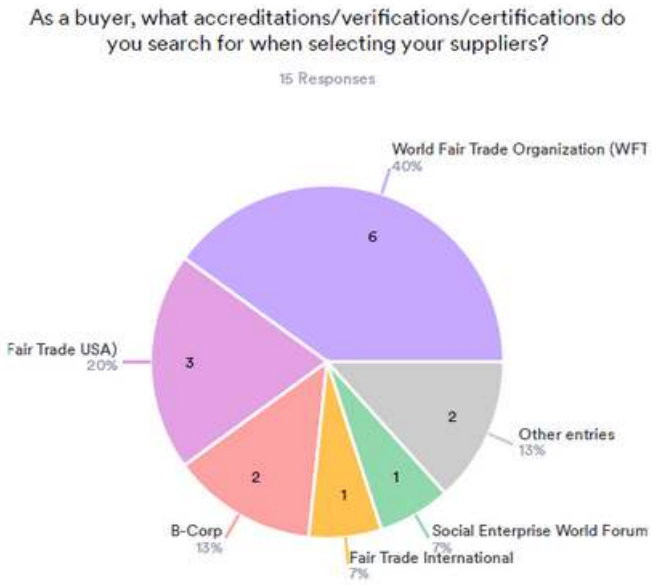
Graph 63.
Familiarity with the First Buyer Label among Brands and Buyers

Further inquiries about the primary challenges that buyers encounter with Fair Trade products and the accreditations, verifications, and certifications used for supplier selection revealed interesting findings. A significant majority identified price, eligibility, quality, and volume as key challenges, suggesting obstacles in fair trade commitments. Additionally, participants' responses showed varied reliance on certification labels: 40% use the WFTO label, 20% the Fair Trade USA label, and 13% the B-Corp label, indicating a diverse trust in these certifications/verifications most likely due to their global presence, credibility, or specific criteria.

Gateway to Fashion Survey for External Brands and Buyers



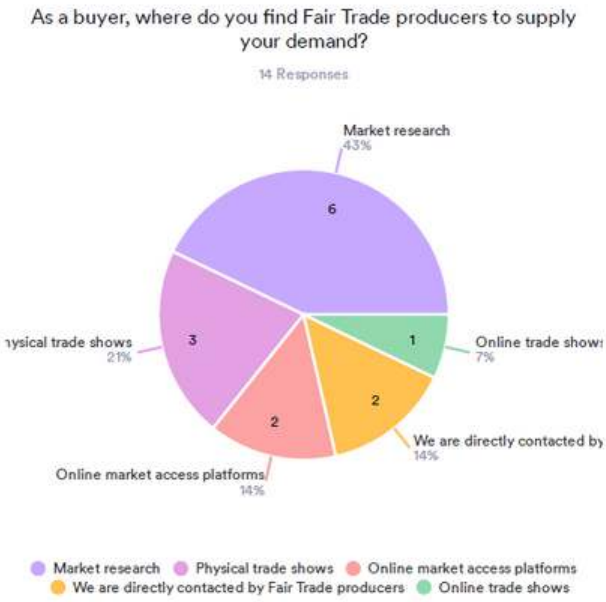
Graph 64.
Primary Challenges Brands and Buyers Encounter with Fair Trade Products



Graph 65.
Certifications Used by Brands and Buyers for Supplier Selection in Fair Trade Products

When asked how buyers locate Fair Trade producers to fulfill their requirements, the responses varied. A significant majority (43%) reported utilising market research, while 21% benefited from physical trade shows. Direct contact and online market access platforms were preferred by respondents with 14% for each option. Additionally, 7% of buyers disclosed that they find manufacturers through online trade shows. These diverse methods reflect the multi-channel approach buyers employ to discover and engage with fair trade producers, leveraging both traditional and digital platforms for sourcing.

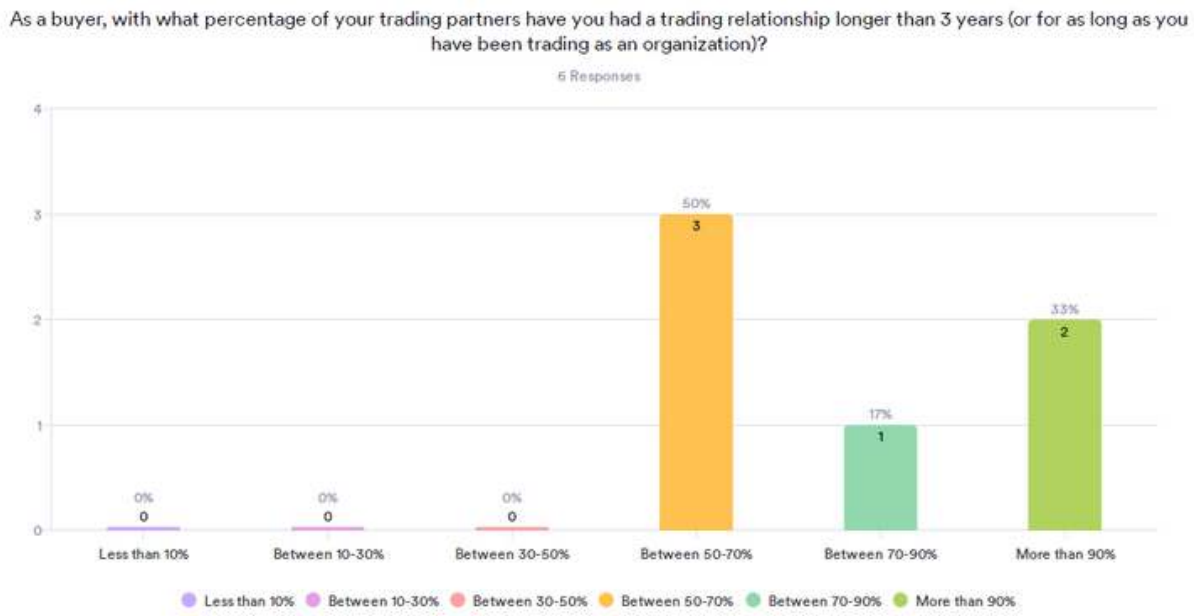
Gateway to Fashion Survey for External Brands and Buyers



Graph 66.
Methods Used by Brands and Buyers to Locate Fair Trade Producers

In the final phase of the survey, participants were prompted to express the longevity of their business partnerships, specifically, the proportion that has exceeded a duration of three years. Responses revealed that 33% of respondents stated that more than 90% of their partnerships have surpassed this milestone. Concurrently, 17% indicated a ratio between 70% and 90%, whereas a significant 50% reported a proportion within the 50% to 70% bracket, still showing a majority.

Gateway to Fashion Survey for External Brands and Buyers



Graph 67.
Longevity of Business Partnerships in the Commercial Sector

04

Conclusion and Recommendations

As The World Fair Trade Organization (WFTO), we have prepared the Gateway Fashion Market Report by gathering survey data from its diverse member base, which includes producers, non-producers as well as affiliates such as applicants and also external buyers. This report centers on three main objectives to understand the current needs of Fair Trade organisations, pinpointing areas for enhancement, and proposing strategies for progress. Notably, for the "Benchmark and Connect" segment of the project, the study has presented an in-depth evaluation of these prevailing practices. Specifically, this report has aimed to lay the groundwork for establishing industry standards and forging stronger ties within the Fair Trade community.

The report has also explored the geographical distribution of members working in the fashion sector, their organisational activities, WFTO's role in marketing, design, and e-commerce, customer segmentation, e-commerce requirements, production and procurement processes as well as several other facets, and it has underscored the importance of Fair Trade in the commerce. Additionally, the report has furnished insights into the challenges encountered by buyers and producers, marketing and procurement methodologies, the significance of fair trade certifications, and label awareness. Broadly, it sheds light on the viewpoints and necessities of all participants in the fair trade ecosystem, illuminating the operations of this ethical and sustainable trade format on a worldwide scale. Following the initial findings of this report, we've delineated a set of recommendations to guide future trajectories:

1. Producer Expertise-Based Grouping

Organising members according to their domain expertise can enhance a streamlined and focused implementation, comprising producers, non-producers, and external buyers affiliated with WFTO.

2. Championing Cross-Functional Synergy

Harness diverse perspectives and talents by distributing each category—producer, non-producer, and buyer—across different groups can promote a holistic understanding of challenges and solutions.

3. Departmental Segmentation

Considering the varied experiences with Fair Trade among groups, it is prudent to segment them based on functional areas such as logistics, design, and marketing. For example, members who are facing design challenges could engage in meaningful dialogues with counterparts who possess relevant expertise, fostering knowledge transfer.

4. Geographical Consideration

Dividing the groups into their geographical sones identified in the survey, such as the Middle East, Europe, Africa, and Asia can provide insights into regional nuances, particularly beneficial for market research, and enable a more localised approach to strategies and solutions.

5. Building Feedback Mechanisms and Continual Advancement

A dedicated action group discussion trajectory should be established to solicit and analyse feedback that can inform future projections and highlight areas for immediate operational improvements.

6. Nurturing Innovation and Forward-Thinking

Creating an action group discussion trajectory focused on innovation and strategic foresight that can brainstorm and develop forward-looking market strategies, ensuring the organisation remains at the cutting edge.

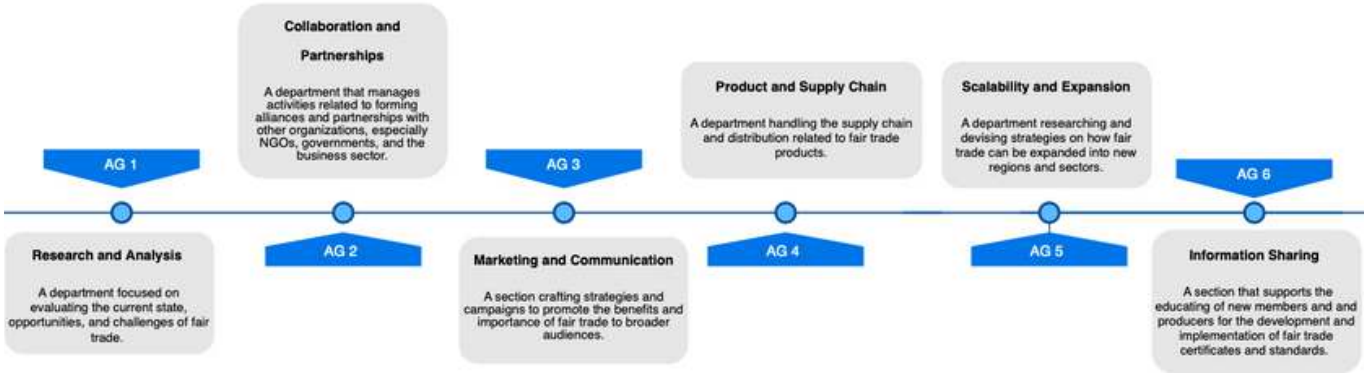
7. Strengthening Communication Channels

A robust communication action group discussion trajectory should be designated to manage both internal and external communications. This ensures that stakeholders remain informed about project trajectories and outcomes, fostering transparency and engagement.

8. Continuous Learning and Development

For enhancing the effectiveness of these action group discussion trajectories, we can consider establishing a group dedicated to learning and development that can help members stay updated with the latest industry practices, refine their skills, and thereby contribute more effectively to their respective groups.

Finally, as also illustrated in the subsequent Graph 68, targeted action groups can be further categorised into several distinct subgroups.



Graph 68.
Categorisation into Subgroups of Targeted Action Groups (discussion trajectories)

Annex I

Fashion Industry and Sustainability: A Global Overview

1. Sustainability and Fashion

The concept of sustainability in fashion pertains to the conscientious integration of social responsibility, economic welfare, and ecological health into the life cycle of clothing items. The rise of fast fashion - the rapid production of inexpensively made, 'trendy' clothing - has increased concerns regarding overconsumption, waste, and the exploitation of labor in developing countries Many brands and consumers are now turning to sustainable fashion as an answer to these concerns (Fletcher, 2014).

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2. Fair Trade and Fashion

The notion of Fair Trade in the fashion industry implies a commitment to ensuring equitable trade partnerships that are based on dialogue, transparency, and respect. Such partnerships seek to create greater equity in the global fashion trade. Fair trade in fashion ensures that artisans and workers are paid fair wages and work in safe conditions, further emphasising environmental sustainability throughout the production process.

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3. Fairly Traded Fashion Industry and its Global Impact

3.1. Fashion Industry in the Middle East

The Middle East, known for its historic trade routes and luxurious textiles like silk and cashmere, has a burgeoning fashion scene. The WFTO's Middle East members have been active in fostering partnerships between local artisans and global markets (Stillman, Y. 2017). Their efforts have brought fair trade principles to the region's fashion industry, allowing smaller artisanal brands to gain visibility while emphasising traditional craftsmanship (WFTO, 2020: 24).

3.2. Fashion Industry in Europe

Europe, with cities like Paris and Milan at its core, commands a significant position in the global fashion hierarchy. The WFTO has numerous European members that are active in promoting sustainable fashion through fairs, educational programs, and partnerships (Joergens, 2006). Many European consumers, influenced by the initiatives of the WFTO and similar organisations, are more inclined to pay for ethically sourced garments (WFTO, 2019: 12).

3.3. Fashion Industry in South America

From the side of South America offers unique materials for fashion derived from its vast Amason rainforest and Andean highlands. WFTO's presence in South America has been pivotal in emphasising fair trade principles in the region's fashion industry (Bird, 2018). Through various events and initiatives, WFTO's South American chapters have been proactive in championing the rights of indigenous artisans and promoting traditional art forms (WFTO, 2019: 18).

3.4. Fashion Industry in Africa

Africa, with its rich textile heritage, has seen a significant shift towards sustainable fashion practices, partly due to the efforts of WFTO's African members. Their work in fostering partnerships, educating artisans about their rights, and promoting fair trade principles has revitalised the continent's fashion sector (Remy et.al., 2016). Countries like Ghana and Kenya are witnessing the establishment of more fair trade cooperatives, supported by WFTO's ongoing activities (WFTO, 2020: 20).

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4. The Future of the Fashion Industry

As concerns over the environment and social justice continue to grow, the future of the fashion industry seems intrinsically tied to sustainability and fair trade. Brands and manufacturers are expected to increasingly turn to recycled materials, embrace transparency, and adopt responsible production practices. Furthermore, the role of technology, especially with regards to tracing product origins and verifying fair trade claims, is predicted to be pivotal (Shen, 2014).

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