

Module 11: Marketing Organic Food



Learning outcomes

On successful completion of this module you will be able to:

- Describe the evolution of the organic food market
- Define certified organic food
- Understand the importance of branding in organic food sales
- Understand challenges associated with the future of the global organic food industry

11.1 Introduction

"How we eat determines, to a considerable extent, how the world is used"
Wendell Berry (1990)

"There is little doubt that consumers in Australia determine what food products are available"
David Pearson (2014)

While previous modules have addressed various aspects of food marketing in general, this module focusses specifically on one of the major emerging food categories, organic food.

Many argue that reducing the environmental impact of food production systems on a per unit basis will be a vital component of meeting the food security challenges of the 21st century. Certified organic food represents one example of a production system that explicitly aims to achieve this. It is the most well recognised global 'brand' in this area and is often used by influential organisations (United Nations, WWF and the like) as an example of a more environmentally sustainable food production system.



Activity

Before we continue, spend a few minutes thinking about the impacts of food choices you make:

- On your health
- On use of scarce resources such as water, soil, fossil fuels
- On biodiversity
- On livelihoods of those along the supply chain

We will be exploring the impact consumers have on the food system and the implications of this for food marketing as we progress through this module.

To fully understand the food marketing lessons that may be derived from understanding the organic food movement; we will continue this module by reviewing its history. By doing this, we will be able to examine the environmental, social and economic implications of the organic movement and how these have evolved over the years. We will then look at the requirements for organic certification. This is followed by a review of the current market for organic products around the world and why branding is important in this market. Finally, challenges facing the organic food movement are discussed.

11.2 Evolution of the organic food movement

In many ways, the relationship most people have with food has always been coloured with anxiety. The main issue throughout our history has been the supply, or lack thereof, of food. This has been exacerbated by an uneven distribution of the available food products.

However, for the affluent people around the world today, this has been largely replaced by the concern for the quality attributes of food. In many developed countries, food supply far exceeds demand, and how much an individual can consume, and what types of products, depends solely on their wealth and personal preferences.



Activity

Before we continue, spend a few minutes thinking about food:

- Do you know what your parents ate?
- Do you know what your grandparents ate?
- When you travel, how important is it for you to try different foods? And drinks?

It is interesting to note how much food habits in Australia have changed over the last century, and the diversity of food products that are enjoyed by different cultural groups both within Australia and globally.

The organic movement has a history of over 50 years. However, the concept of organic farming is not new. Organic farming has been practised since humans started moving away from hunter-gatherer origins and first started cultivating land, as all farming was initially organic by default.

In other words, people weren't following organic principles because they were exercising a choice or because they made a conscious decision to do so, but rather because of 'absence of a choice'. Simply put, farmers did not have access to synthetic fertilisers or mechanical apparatuses that have been the cornerstone of industrial agriculture.

However, today organic food is produced by intent, not default.

Organic farming is not just about the farming practises itself, but also its wider reaching socio-cultural aspects that continue to shape, and be influenced by, our society.

The first inorganic fertilisers that marked the start of the 'agricultural revolution' and allowed farming to move towards being 'industrialised', or what is now referred to as 'conventional agriculture', were produced in the 1840s. These new agricultural methods have contributed to increases in yields and the consequent improvement in food supply and security.

In addition to changes in production methods, rural lifestyles and traditions changed as more and more people moved into cities. Furthermore, some people became concerned about degradation of soil quality and reductions in the nutritional content of products from conventional agriculture.

As a result of these issues, some individuals working in the food system started to look for alternatives. While Walter Northborne may have been the first to use the term 'organic farming' in his book *Look to the Land* in 1940, the origins of the organic movement had already been ignited in the early 1900s in different countries.

In Germany, Rudolf Steiner conducted his famous lectures on 'biodynamic agriculture' in 1924, which provided one of the starting points for the organic movement. Steiner's approach was not limited to the health of the soil from a scientific perspective, as the agricultural methods promoted by him included a spiritual element and were linked to cosmic forces. Because of this spiritual aspect, his methods have attracted a lot of criticism and ridicule, but biodynamic, as this approach is now called, was part of a bigger movement, the Anthroposophist Movement, which was especially important in the Western Europe and continues to attract thousands of followers.

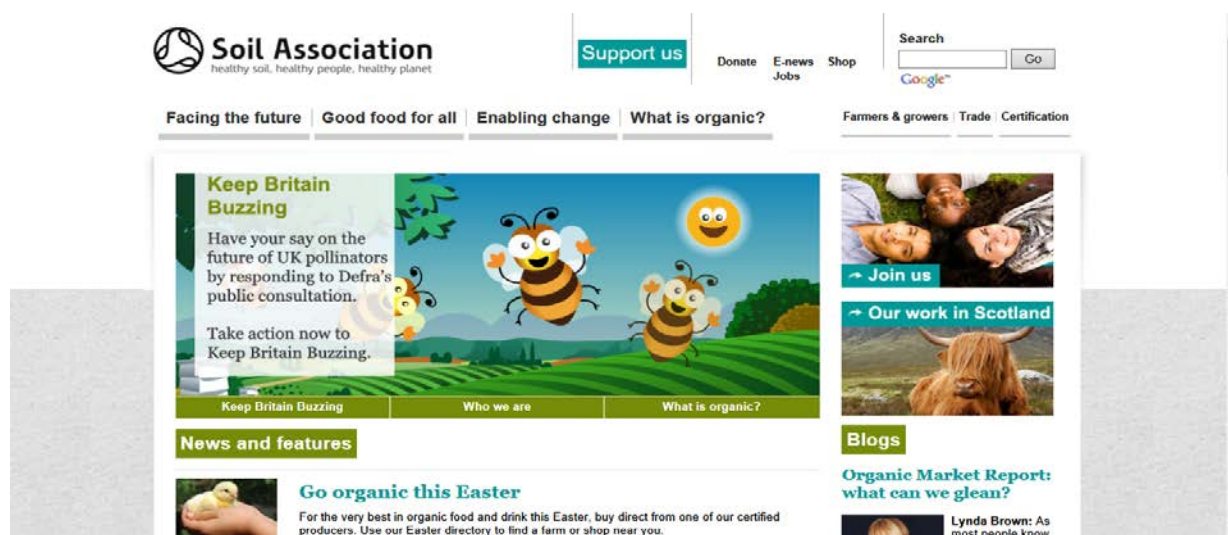
Notable individuals in the English speaking world are Albert Howard and William Albrecht, who both drew direct links between the health of soil and the health of people eating food from it. Lady Eve Balfour, who co-founded The Soil Association in 1946, which is now the leading charity campaigning for sustainable agriculture in the UK, also contributed.



Website

Certification and advocacy organisation in UK

Spend 5 to 10 minutes looking at the issues the Soil Association now addresses as well as the resources they provide for various stakeholder groups. Their website is available through this [link](#).



Despite the dispersed global interest in organic farming, it remained a minority business in most parts of the world in the years following the Second World War. As the world was recovering from the physical and economic consequences of the war, the pressure was on the farmers to produce more food than ever before, and the use of pesticides increased rapidly in many countries. Advances in technology also contributed to this, as for example, aircrafts that were able to spread fertilisers and pesticides quickly and efficiently over the large areas.

The term 'Green Revolution' is used to refer to a range of research, development, and technology initiatives that ran from the 1940s to the 1970s. In particular, it involved the development of high-yielding varieties of grains, the modernisation of farm management techniques and the expansion of large-scale irrigation infrastructure. The distribution of hybridised seeds and synthetic fertilisers and pesticides to farmers were also key elements of the movement.

Initially, the 'Green Revolution' was heralded as a great success and was credited with significantly reducing famine in many countries. However, the limitations of the new methods and crop varieties became increasingly apparent from the 1960s onward. As pesticide use increased, the scientific evidence of the negative effects of synthetic chemicals started to become more and more apparent. Rachel Carson, an American marine biologist, started to investigate the environmental problems they caused in the 1950s. Her book 'Silent Spring' (1962) brought consumers' attention to these issues. The book also played a significant part in the final ban of the use of DDT as a pesticide in 1972 within the USA.

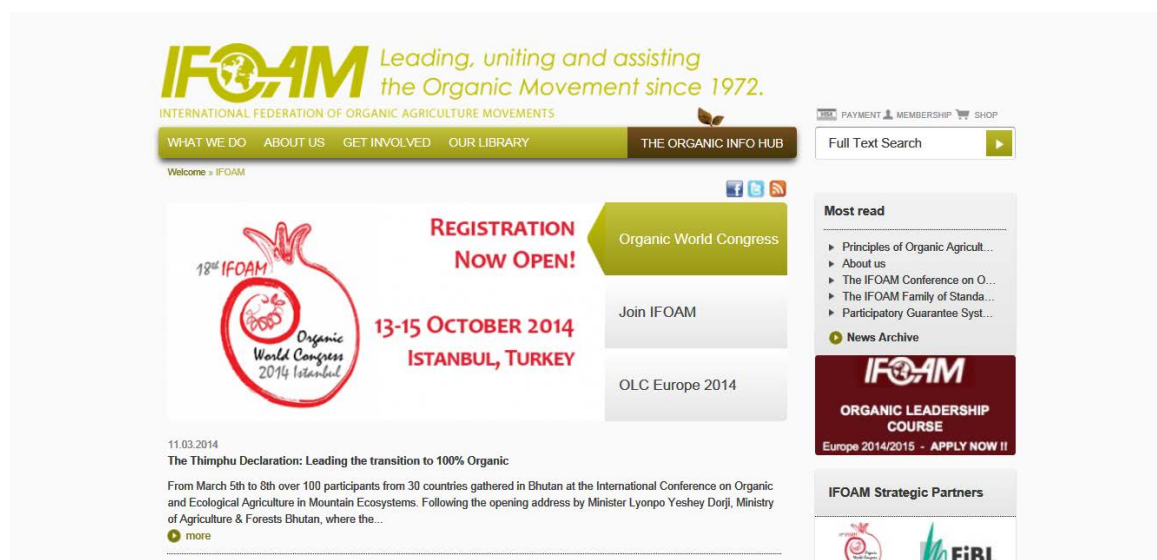
In terms of the history of the organic movement, 1972 also signalled the foundation of the International Federation of Organic Agriculture Movements (IFOAM).



Website

Umbrella organisation for global organic food movement:
International Federation of Organic Agricultural Movements –

Spend a few minutes looking at the 'What we do' section of this website (available [here](#)) to see the diversity of activities undertaken by this organisation.



The following global social trends are seen by many to have contributed to the growth of what has become known as the organic food movement:

- Great social and political upheaval worldwide, combined with heightened public awareness of environmental threats;
- Greater suspicion of synthetic chemicals in all aspects of food;
- Growing concerns from farmers about their own health; and finally,
- The countercultural revolution, particularly dominant in the 1960s, which also promoted 'back-to-the-land' ways of living.

In summary, the practise of organic agriculture, with its emphasis on minimising the use of artificial chemicals and other external inputs, is not new - as it exists in all systems operating without human contributions, whilst its philosophical position emerged as a reaction against the increased 'industrialisation' of food production that occurred in developed countries around the 1940s. Organic agriculture is now established as one of the crucial components of the global food system.

11.3 What is certified organic food?



Activity

Before we continue, spend a few minutes thinking about organic food:

- Do you know what is required to label food as organic?
- How is organic food produced? Processed? Retailed?
- How is organic food marketed?

It is interesting to note how often consumers buy food, and how passionate some are about specific foods, yet how little many actually know about them.

The International Federation of Agricultural Movements (IFOAM) has developed the following definition for organic agriculture.

It is important to note that its scope is beyond a widely held misconception that organic agriculture simply relates to the use, or lack thereof, of chemical inputs such as fertilisers and pesticides.

'Organic agriculture is a production system that sustains the health of soils, ecosystems and people. It relies on ecological processes, biodiversity and cycles adapted to local conditions, rather than the use of inputs with adverse effects. Organic agriculture combines tradition, innovation and science to benefit the shared environment and promotes fair relationships and a good quality of life for all involved' (IFOAM, 2014).

This definition takes into account the whole food supply chain - from farmer to consumer. Thus the focus is not solely on production factors, but also on the social impacts of the process of producing, processing, selling and consuming food. It is inclusive of all products, people and places, and able to be applied to suit a wide variety of situations.

IFOAM expands on its definition by providing four principles, namely, health, ecology, fairness, and care (IFOAM, 2014).

Health: This principle states that organic agriculture "*should sustain and enhance the health of soil, plant, animal, human and planet as one and indivisible*". In this context, health is considered to be the wholeness and integrity of living systems. Hence it is not simply the absence of illness, but the maintenance of physical, mental, social and ecological well-being. Thus, organic agriculture aims to produce high quality, nutritious food that contributes to wellbeing as a form of preventive healthcare. This is achieved by minimising the use of fertilisers, pesticides, animal drugs and food additives that may have adverse health effects.

Ecology: This principle states that organic agriculture "*should be based on living ecological systems and cycles*". Thus, organic farming, pastoral and wild harvest systems should fit the cycles and ecological balances in relation to the culture and scale in the natural local environment. Inputs should be reduced by reuse, recycling, and efficient management of materials and energy. And finally, organic agriculture should aim to protect and benefit the common environment including biodiversity, as well as variety of habitats and landscapes.

Fairness: This principle states that organic agriculture should "*build on relationships that ensure fairness with regard to the common environment and life opportunities*". This is amongst people, and with other living beings. Individuals should have a good quality of life; hence organic agriculture aims to

contribute to food self-sufficiency and the reduction of poverty. Further, animals should be provided with the conditions that accord with their natural behaviour.

Care: This principle states that organic agriculture should *"be managed in a precautionary and responsible manner to protect the health and well-being of current and future generations and the environment"*. This incorporates a blending of scientific developments with traditional wisdom. Thus, organic agriculture aims to prevent significant risks by adopting appropriate technologies and rejecting unpredictable ones, such as genetic engineering.

Based on these principles, IFOAM has developed standards and associated certification systems for organic products. Organic standards are used to create an agreement about what an 'organic' claim on a product means, and in many cases it is communicated to consumers through a certification symbol or logo.

IFOAM provides a minimum set of requirements for organic production and processing. This substantial document provides details for production (crops, animals, and aquaculture), processing, handling, labelling and social justice. Both private standards and government regulations are eligible for consideration for official endorsement with this IFOAM baseline through a process referred to as 'equivalence'.

The requirements for certification of organic food are very detailed. See, for example, those from one of the seven organic certification organisations in Australia:



Website

Australian Certified Organic Standard 2013, available [here](#).



AUSTRALIAN CERTIFIED ORGANIC
STANDARD 2013



The existence of credible certification process for organic products is extremely important for both the producers and consumers.

Certification aims to ensure consistency of the quality attributes embodied in organic products. Thus, it reduces opportunities for fraud and increases consumers' confidence in the product. In Australia, this is supported by Federal Government involvement and industry representation.



Federal Government involvement with organic food through Department of Agriculture. Available [here](#).

Websites

Umbrella organisation for Australian organic food movement: Organic Federation of Australia. Available [here](#).

Certification and advocacy organisation in Australia: Australian Organic. Website available [here](#).

The screenshot shows the Australian Government Department of Agriculture website. The header includes the Australian Government logo and navigation links: Home, About Us, Grants & Assistance, Media Centre, Publications, Ministers, Languages, and Contact Us. Below the header is a breadcrumb trail: DAFF Home » Agriculture and Food Home » Food » Organic and Biodynamic Produce. A left sidebar menu lists various food-related topics, with 'Organic and Biodynamic Produce' highlighted. The main content area is titled 'Organic and Biodynamic Produce' and contains three sections: 'The Department of Agriculture's role in the organic and biodynamic food industry', 'Certification of organic produce in Australia', and 'Labelling of organic and biodynamic produce for Australia's domestic market'. Each section provides detailed information about the department's role, certification standards, and labelling requirements. A search bar and a 'Go' button are visible on the right side of the page.

The screenshot shows the Organic Federation of Australia website. The header features the Organic Federation of Australia logo, which consists of a stylized orange circle with the text 'OrganicFederation OF AUSTRALIA' inside. Below the logo is a navigation menu with links: HOME, ABOUT, MEMBERSHIP, NEWS, EVENTS, RESOURCES, and CONTACT. The main content area is a large image showing a close-up of a hand holding several ripe, red strawberries.



In summary, as consumer trends throughout the developed world are towards 'one-stop-shopping' for food products, such as weekly purchases from supermarkets, where there is no direct connection with producers. In these circumstances, organic certification logos provide a vital role in identifying the production method used.

11.4 Organic food market



Activity

Before we continue spend a few minutes thinking about organic food:

- Do you or anyone you know buy organic foods?
- What do they buy?
- Why do they buy them?

It is interesting to note the great diversity of food products, and consumer motivations, in an affluent country like Australia.

Global sales of organic food and drink have grown over three-fold over the last ten years, to over \$US60 billion in 2012.



Website

Report on global organic food market –

Willer, H and Lernoud, J (Eds) 2014, *The world of organic agriculture. Statistics and emerging trends*, FiBL-IFOAM – Available [here](#).



Despite growth, global market share, and land used for organic agriculture, is still quite low (at around 1%). Denmark has one of the highest market shares, with sales at 7%. This has been attributed to a large extent as being the result of sustained government support for development of the whole organic food supply chain.

The market for organic food products in Australia is estimated to be around the global average market share of 1%, or over \$1 billion of sales per annum. Further, most food buyers (65% in Australia) purchase organic food some of the time.



Website

Report on organic food sales and marketing in Australia –

Monk, A, Mascitelli, B, Lobo, A, Chen, J & Bez, N 2012, Australian Organic Market Report – Available [here](#).



Attributes of organic food that appeal to consumers: health and environmental sustainability

Consumers are remarkably consistent across cultures and over decades as to the most important attraction to organic food products, which is the perception that they are better for their health. However, it is important to note that this consumer perception is not supported by conclusive scientific evidence (Smith-Spangler et al., 2012).

Of less importance to consumers is the view that food from organic supply chains has a lower negative impact on the natural environment.

Attributes of organic food that deter consumers: higher price and limited availability

In many cases, the prices of organic products are a lot higher than those from the conventional supply chain, and this deters many buyers. The variation in actual prices for a specific product is large, and may be up to 10 times more.

In Australia (and many other developed countries), over recent decades, the availability of organic products has expanded from complementary retail outlets (such as farmers markets, health food stores and the like) into more mainstream shopping outlets (such as supermarket chain stores). This ease of access has enabled many of those who would not have made the effort to seek out organic products to start purchasing them, and those who were to purchase them, do so more often.



The following [video](#) overviews academic literature which analysed whether organic food is healthier than conventional alternatives and whether there is any evidence that organic is healthier.

Video

The growth in organic food sales has attracted attention from retailers, and now supermarket chains in Australia all offer a wide range of organic products. This growth has also resulted in a significant body of academic literature that adds to our understanding of the organic food market and behaviour of consumers who support it.

In summary, organic food is currently a niche market, where the perception of being healthier is sufficiently attractive to overcome its higher price for most buyers (some of the time).

11.5 Why is branding important in the organic food market?



Activity

Before we continue, spend a few minutes thinking about brands:

- Why do brands exist?
- Who owns a brand?
- Who invests to create and maintain a brand?
- Who benefits from successful brands?

Brands have become prolific in affluent societies, particularly in consumer markets. It is interesting to note that this has not always been the case, and that not all brands are successful.

What is a brand?

The extensive use of brands around the globe is supported by a significant body of academic knowledge. Within this, a brand is generally defined as a mark, or 'identifier', on a product or service, which enables it to be recognised by individuals.

Brands include United Nations and Coca-Cola – both with a global reach, through to those with only local relevance - such as a marking placed on livestock by farmers and a signature on an artwork.

As it requires effort to undertake branding, the proliferation of brands in industrialised countries is a testament to their relevance. This potential for a brand to add value may be considered from perspectives of the brand's originator and the resulting brand's audience.

Value of a brand

The value of branding to originators, whether they are multinational organisations or individuals, emerges from diverse areas. Prominent examples include being able to detect ownership (e.g. livestock), ascertain authenticity (e.g. artwork), create awareness and encourage consumer purchases in a competitive market place (e.g. Coca-Cola), or reputation for advocating peace and human development (e.g. United Nations).

Brands may also provide value to an audience who are often potential buyers of the branded product. The potential value emerges from brands that create a sense of being different from alternatives in meaningful ways, and importantly, providing some assurance or consistency of quality.

Successful brands have the potential to reduce the effort from the audience required to search for and evaluate alternative brands. For example, the consistency of a thirst quenching experience from a branded soft drink. In this situation, consumer awareness is supported by advertisements that have created a positive brand image, and from personal experience. Other examples of audience-originator connections formed through the creation of brands range from individuals (for example, supporters of Greenpeace) through to specific countries (for example, national governments who are members of the United Nations).

A brand is usually centred on the visual form of a logo. Prominent and enduring brands tend to incorporate mutually supportive features, which assist in creating a brand image

that creates a unique position from the audience's perspective, relative to alternative offerings. These features may be seen as being either functional (objective measures such as cost, size, colour etc.) or intangible (healthy, reliable, quality and the like).

Branding organic products

A product which is differentiated with an intangible feature, such as organic, is an example of a credence good. These pose challenges for consumers, who are often overcome with the creation of a brand.

Credence attributes are difficult for consumers to judge even after purchase (such as health or environmental credentials), in contrast to search attributes; which may be evaluated prior to purchase (such as price), and experience attributes; which may be evaluated after purchase (such as taste).

However, it is challenging to create one 'brand' for all organic products, as there is a large number of independent organisations who collectively make up the organic food movement.

Many products are owned by an individual organisation, thus allowing them to control all promotional activities for those products. The evolution of global brands such as Coke for carbonated beverages or Chiquita for fresh bananas are examples. However, to date, the diversity in the organic industry has precluded the development of a global brand or even dominant national brands in most countries.

The reasons for this relate partly to the organic certification organisations. These independent organisations (there are seven in Australia) have their own logo, or brand, placed on products to indicate that it has been certified by them. Whilst undoubtable benefits accrue from the competition generated between these organisations, it has diminished the awareness of organic as a 'brand' in the customer's mind, as they see different certification brands instead of one clearly identifiable brand on all certified organic products.

Examples of organic certification logos

From Australia:



From the European Union:



From the USA:



The potential power of an organic brand has been further diminished by the use of the word 'organic' on products that are not certified organic. Organic bottled water is a common example. Organic in this case refers to the natural state of the product, not its certification standard.

Another example includes products that use the word organic in a totally different context in which it has no relevance to certified organic, such as hair care products called 'organics'. In this instance, the product range contains many ingredients that would not be permitted under organic certification standards.

In summary, having a clear and credible organic brand is vital to assure consumers that the product has come from a certified organic supply chain. However, due to the diversity of organic brands, it is difficult for them to create strong awareness amongst consumers and cut through the cluttered information environment.

11.6 Challenges in the global organic food movement



Activity

Before we continue, spend a few minutes thinking about the organic food movement.

- What are the key factors for success in the organic food movement?
- Which of these are relevant to marketing food products in your area of interest?
- In which areas is the organic food movement vulnerable?
- In which areas is your food product vulnerable?

It is interesting to note the extent to which success may be attributed to factors within, or outside, an organisation's control.

The three most pressing challenges for the organic food movement are:

- Maintaining credibility of the organic brand
- Coordinating its diversity, and
- Fending off challenges from other food brands.

All brands are dynamic, and may be seen as existing in a competitive environment subject to the constant forces of creation and destruction. The major challenges faced by the organic brand, which is vital for consumers to identify these products, relate to maintaining credibility with consumers. Its most vulnerable characteristic is the fact that consumer perception of superior health qualities is not consistently supported by scientific evidence.

Whilst there is significant momentum and evidence of success, the organic food movement represents a diverse constituency, ranging from global to local scale activities and almost every conceivable food product. In a sense, this diversity provides resilience, however, it is constantly vulnerable to the possibility of disintegrating into its constituent parts. Such an outcome would have a massive negative impact on the organic brand.

And finally, organic food represents a niche market where consumers are able to choose from many substitute products. Whilst organic food offers an alternative to conventional food, there are other food brands that compete for consumer attention in the alternative food space. At the moment, the concept of 'local food' is the greatest threat. This low 'food mile' option, where the food is produced, processed and purchased in the local area (such as within 100 km), is seen by many to be offer a suite of benefits to both producers and consumers that may, over time, take sales away from certified organic products.

11.7 Conclusions

The concepts and philosophies underpinning organic food have evolved since the 1940s as an alternative to the increasing industrialisation of food production. Today, a wide range of certified organic products are grown and made available to consumers throughout the world. These are sourced using distribution channels, ranging from subsistence farming though to supermarkets with multinational supply chains.

Marketing organic food is enacted by many independent organisations who benefit from the organic brand. Its credibility is enhanced by global leadership from the International

Federation of Organic Agricultural Movements; with its principles of health, ecology, fairness and care that are now manifested in certification systems for organic food products throughout the world. As such, organic food provides an example of a food system, and associated marketing, which gives explicit emphasis to human health and environmental sustainability.

The continuation of sales growth for organic food products is anticipated as more consumers seek information about the source of their food and, as part of this, place value on organic certification. However, like all brands, organic food is vulnerable to more appealing offers being provided by competing brands.

Fairtrade

Fairtrade offers an alternative to conventional trading procedure between producers and traders, and businesses and consumers. Fairtrade is an organisation (operating within 24 different countries) that promotes the rights of farmers and producers, and implements standards to protect the environment from harmful production practises (Fairtrade 2011f).

Fairtrade's vision is 'a world in which all producers can enjoy secure and sustainable livelihoods, fulfil their potential and decide on their future.' Their mission is to connect disadvantaged producers with consumers, promote fairer trading conditions and to empower producers to combat poverty and to take more control of their lives (Fairtrade 2011e).

Standards of operation encompass small producer organisations, hired labour, contract production and trade. There are four common principles of these standards. The first is social development, requiring organisations to be transparent; providing training opportunities and health and safety practises to enable a product to be sold. The second principle is economic development, requiring buyers of Fairtrade products to pay a 'Fairtrade Premium' or a 'Fairtrade Minimum Price' to producers. The Fairtrade Premium exists to improve the quality of life of workers, farmers and the community. The Fairtrade Minimum Price enables the producer to cover the cost of sustainable production. The third principle is environmental development, requiring environmentally sound agricultural practises. This is displayed through safe use of chemicals, proper management of waste, maintaining soil fertility and the prohibition of GMOs. Though organic certification isn't required, Fairtrade offers a higher Minimum Price for organic products. Lastly, forced labour and child labour are prohibited (Fairtrade 2011a).

Fairtrade certifies producers and traders that abide by their established standards. All potential candidates are inspected and audited to ensure that they operate within the standard, and are then granted a Fairtrade Mark to use on their product's packaging (Fairtrade 2011b). Over 27,000 different products (including foods and drink, cotton, clothing and jewellery) carry the certification logo, available in over 120 countries (Fairtrade 2011c). The Fairtrade Mark (featured above) symbolises Fairtrade's mission: blue sky for optimism, green for growth, and a raised arm for empowerment (Fairtrade 2011d).

In 2012, there were 1149 Fairtrade producer organisations, comprised of 1.3 million farmers and workers, their products generating €4.8 billion in sales (Fairtrade 2013).



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