



SEED Market Study

Assessing the Export Potential of Eco-
inclusive Enterprises from the SEED
Network in International Markets



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www.seed.uno | info@seed.uno

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Authors: Elena Eckhardt, Jonas Restle-Steinert

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Contact us: info@seed.uno

About SEED

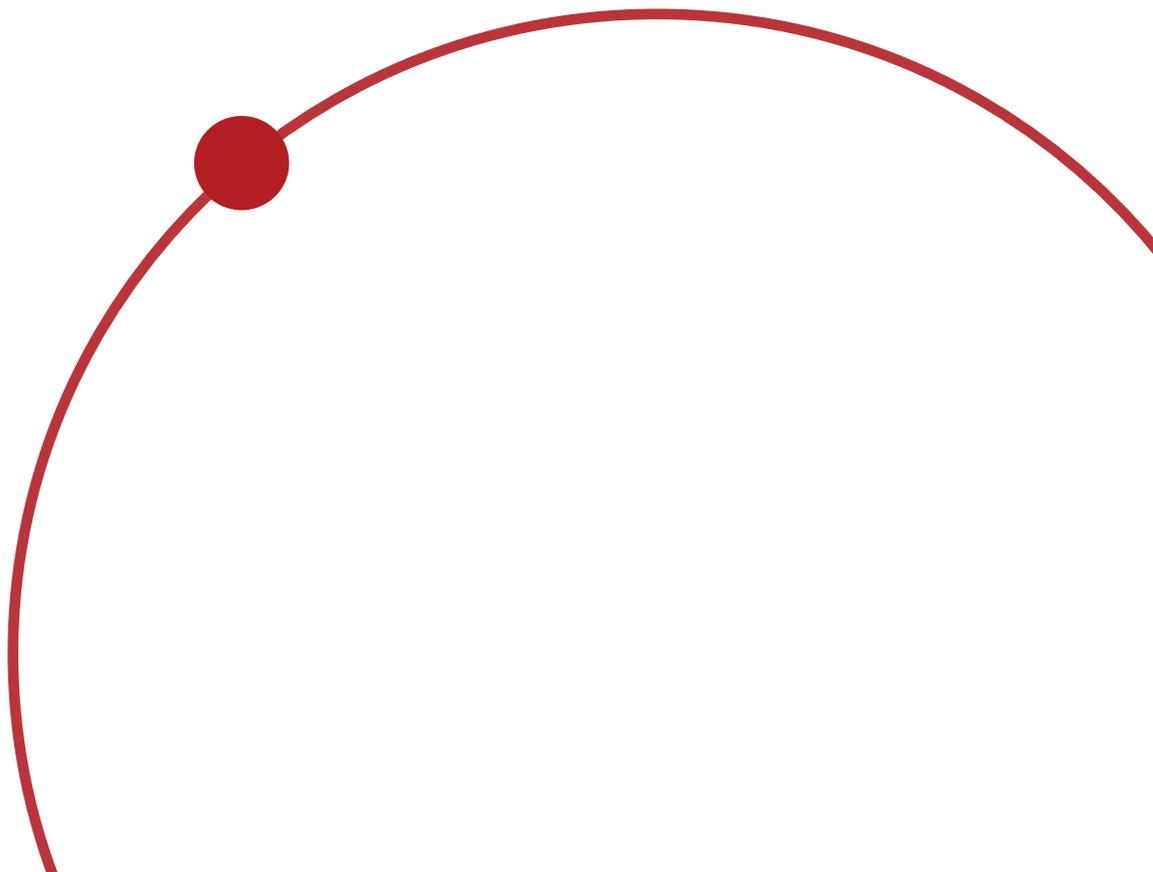
SEED was founded in 2002 at the World Summit on Sustainable Development in Johannesburg by UNEP, UNDP, and IUCN. It is a global partnership for action on sustainable development and the green economy. Today, we seek to unlock the full potential of social and environmentally focused ('eco-inclusive') market-based enterprises. We help to tackle climate change effects and solve the world's social problems, as captured in the Sustainable Development Goals (SDGs).

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EXECUTIVE SUMMARY

Access to international markets helps to foster, disseminate, and scale innovative green and inclusive products by small and medium-sized enterprises (SMEs) from the Global South. Likewise, it capacitates locally embedded eco-inclusive enterprises to adapt to external shocks like extreme weather events or pandemics by diversifying the markets they serve, meanwhile increasing enterprise resilience.

Analysing the export potential of end-consumer goods produced and distributed by eco-inclusive enterprises from the SEED network in the European Union (EU) from the supply and demand side, this report sheds light on market opportunities and challenges faced by SMEs from developing and emerging economies in an exemplary international market.

Eco-inclusive SMEs from the SEED network offer products with export potential in the EU in the following categories: artisan and handicraft products, sustainable fabrics and alternative materials, luxury foods, upcycled and recycled material products, cosmetics, as well as furniture and light manufacturing goods.

When exporting to the EU, eco-inclusive SMEs face both opportunities and challenges:

OPPORTUNITIES

- The demand for sustainable products from the Global South in the EU market is on the rise
- There is a variety of target customer groups for sustainable products from developing and emerging economies, including customers who buy products to act in solidarity with marginalised producers and others who are interested in buying individual, exclusive, and aesthetic products while creating social impact
- The number of potential import partners is growing, whereby main import partners of SMEs from the Global South building bridges to the EU market are fair trade companies and private individuals, including family, friends, and volunteers
- There is rising potential in e-commerce, both through enterprise web stores and online marketplaces

CHALLENGES

- SMEs have to make advance payments for pre-financing customs, transport, and warehousing, which they are often unable to pay for on their own
- Eco-inclusive enterprises also tend to lack access to market information and require support in target market specific branding, design, marketing, and storytelling
- There is a need for collaboration with import partners to be able to access EU markets, which often requires SMEs to sell their goods under the import company's brand
- Scaling product quantities that fill required freight volumes while keeping quality constitutes another challenge when exporting to international markets
- Barriers related to e-commerce include high holding costs and significant shipping fees due to comparatively small export volumes
- Certification, testing, and export documentation for different product categories requires research and time commitment

In sum, the analysis revealed that there is an increasing demand and market opportunity for sustainable products by eco-inclusive enterprises from the Global South in the EU. However, to be able to tap into the EU market for sustainable goods, eco-inclusive enterprises need to form and invest in partnerships in the target market, and potentially invest in certification or digital infrastructure.

Given the fact that there is demand in the EU for products by eco-inclusive enterprises that still face barriers in accessing international markets, supporting SMEs from the Global South in their export endeavours is one way to make the international trading system less discriminatory and more equitable, as postulated by the Sustainable Development Goals (SDGs).

The challenges faced by SMEs from developing and emerging economies in accessing international markets could be mitigated through enterprise business support in three ways:

1. provide tools and peer learning opportunities that increase the capacity of eco-inclusive enterprises to export,
2. support eco-inclusive enterprises in their search for business partners in new markets, and
3. offer an online marketplace for eco-inclusive enterprises to sell their products.

How enterprise business support could support eco-inclusive SMEs from the Global South in accessing international markets



1. BACKGROUND

Manifested through the SDGs and the Paris Climate Agreement, the international community has agreed to tackle prevalent economic, environmental, and social challenges, whereby the private sector and businesses can make a pivotal contribution. Formal and informal SMEs play an integral role in developing and emerging economies, contributing significantly to their Gross Domestic Product (GDP) and employment opportunities (Alibhai, Bell, and Conner, 2017). While economic activity and jobs contribute to societal well-being, economic growth also comes at the cost of an environmental and social footprint (see e.g. Cole, 1999). Yet, SMEs have great potential to mitigate negative impacts and deliver social and environmental benefits through alternative sustainable business models and innovation outside of established paradigms (Koirala, 2018).

SMEs play a central role in environmentally sustainable and socially inclusive development and poverty reduction by offering green products and services and integrating local communities into their business models. In the context of developing and emerging markets, locally embedded SMEs hold significant potential to reach those at the bottom of the pyramid with their products and services by incorporating vulnerable groups into their value chains as suppliers, distributors, employees, and customers (see e.g. GIZ, 2017, SEED 2020a). Indeed, eco-inclusive SMEs with a positive economic, environmental, and social impact are potential drivers of change from which much can be learned and possibly replicated (see e.g. SEED, 2020a, SEED, 2020b).

Trade can serve as a vehicle to foster, disseminate, and scale innovative and sustainable products and services, and increase the adaptability to external shocks and thus enterprise resilience¹ by providing access to alternative markets. This notion is supported by the SDGs, which postulate the promotion of “international trade, and helping developing countries increase their exports” as being key to “achieving a universal, rules-based, open, non-discriminatory, and equitable multilateral trading system” (UNGA, 2015). Sustainable and innovative solutions that contribute to an inclusive green economy, and with regard to the current pandemic situation to a green and resilient recovery from COVID-19, are out there – developed and driven, among others, by SEED-awarded and supported eco-inclusive enterprises.

Among the products and services offered by eco-inclusive enterprises from the SEED network are unique, sustainable, and innovative ideas from diverse sectors including biodiversity, clean energy, green technology, sustainable agriculture, waste management, and water, sanitation, and health (WASH). For 20 years, SEED has supported SMEs from partner countries in Africa, Asia, and Latin America at various stages of enterprise development. The support offered includes targeted workshop and advisory formats plus financial services, growing a network of inspiring entrepreneurs.

The aim of this report is to analyse the international market potential of end-consumer products offered by enterprises from the SEED network from a supply and demand perspective, as well as identifying possible avenues for support. The EU as an exemplary target market and demand-side actor will be examined, including market trends, target customer groups, value chains, and distribution channels. Subsequently, the chances for and barriers to market entry in European markets will be analysed from a supply-side perspective, considering points of view of eco-inclusive enterprises on the roles of partnerships, e-commerce, and certification. Finally, looking at the insights from the supply-demand-analysis through the lens of enterprise business support, recommendations will be drawn.

What is an eco-inclusive enterprise?

Eco-inclusive enterprises are businesses who offer products and services, as well as operate business models that are environmentally beneficial (eco) and socially inclusive. These enterprises are often micro, small, and medium sized, and play a significant role in supporting a country to achieve the SDGs and their Nationally Determined Contributions (NDCs).

¹ Enterprise resilience describes an “enterprise’s ability to respond to external socio-economic or environmental shocks”, including different dimensions like business resilience, financial resilience, organisational resilience, ecosystem resilience, market resilience, and impact resilience (SEED, 2020b, p. 2).

2. ECO-INCLUSIVE PRODUCTS WITH EXPORT POTENTIAL

Generally, the demand for sustainable products in the EU is increasing (ITC, 2019), making it an attractive potential export target market. In the past, products that were exported by SMEs from the Global South to the EU were often bought by customers who engaged with the fair trade movement² to “do something good”. This paradigm, however, is changing in times in which public attention to global challenges, such as climate change and inequality, is rising. Indeed, customers in the EU market increasingly care about producers’ upholding of human rights and environmental protection along the supply chain generating demand for sustainable products (CEval, 2018).

To reach customers looking for eco-inclusive products - products that constitute an alternative to non-sustainable products - it will be key to communicate the unique nature, history, and quality of the product. Being able to market and brand products with professional photos and storytelling will thus be essential for eco-inclusive entrepreneurs who want to export their products to the EU. Reviving traditional handicrafts and promoting special techniques in handicrafts is one interesting product segment that could be linked to communicating the product’s distinguished story. Looking at the unique nature of the product, its profitability also depends on its potential substitute. Honey, for example, can as well be produced sustainably in Europe, which calls into question the sustainability of honey imports with long transport routes, implying greenhouse gas emissions.

In addition to the potential substitution of green, locally produced products, the profitability of products offered by eco-inclusive enterprises from the Global South in the EU depends on the sales channels chosen. For example, the profitability of a product depends on whether it is sold in an on-site shop or online. Compared to other product segments, like artisan and handicrafts or recycled and upcycled material products, food and cosmetics are rather difficult to sell online. Also, on-site stores, such as the German fair trade shops “Weltläden”, tend to be more price sensitive than concept stores or online stores. In addition, the profitability of a product also depends on whether it is sold in a big or small on-site shop. For instance, there is less space in small on-site shops for large items such as baskets and other furniture. Regarding furniture; several interviewees pointed to the COVID-19 pandemic accelerating the sales of home and interior products.

Enterprises from the SEED network offer various products with export potential that could be of interest to end consumers in the EU, including



artisan and handicraft products,



upcycled and recycled material products,



sustainable fabrics and alternative materials,



cosmetics (e.g. oil, soap, balm),



luxury foods (e.g. coffee, honey),



furniture and light manufacturing.³

² Fair trade emphasises the relevance of fair trade relationships between markets in the Global North and the Global South. While the fair trade movement has taken the form of charities in its early days, fair trade nowadays encompasses different philosophies, proponents, structures, distribution networks, and products. In particular, target customers’ product choice is shifting from supply orientation towards demand orientation, and producers from developing and emerging economies increasingly take on the role of trading partners rather than charity recipients (see e.g. Hauff and Claus, 2018).

³ These categories result from an analysis of products for end consumers offered by SEED-supported enterprises up to 2019, excluding local services, such as ecotourism and childcare, or products that are mainly applicable in a local context, including energy solutions like briquettes or cookstoves. Products and services for which export would require highly specialised public quality control systems and testing procedures, such as juices or nutrients, were also excluded from analysis. To validate the categories identified, interview partners were also asked in which product categories they identified the highest export potential in the EU.

Example eco-inclusive enterprises from the SEED network with product export potential in the EU



Artisan and handicraft products

- [2019 SEED Award Winner Malawi Kibébé](#) trains marginalised artisans to transform chitenje, a traditional African fabric, into lifestyle products
- [2011 SEED Award Winner Egypt Karama](#) markets Egyptian handicrafts linking marginalised artisans to the global market, including products such as mother-of-pearl inlays, patchwork, and embroidered textiles, engraved brass and copper items, as well as blown perfume bottles and ornaments



Upcycled and recycled material products

- [2019 SEED Award Finalist India Aarohana EcoSocial Developments](#) upcycles waste plastic using traditional handlooms to weave it and make upcycled-handwoven products
- [2014 SEED Award Winner South Africa All Women Recycling](#) crafts plastic bottles that are sourced from landfills, street waste collectors, and collection points into unique gift boxes, known as kliketyboxes
- [2011 SEED Award Winner Burkina Faso GAFREH Plastic Bag Recycling Centre](#) collects plastic bags from the streets and makes handicraft products using various craft techniques (weaving, knitting, melting, casting)



Sustainable fabrics and alternative materials

- [2019 SEED Award Winner Indonesia Mycotech](#) produces Mylea, a vegan leather made from mushroom, and collaborates with designers to develop Mylea into end products
- [2019 SEED Award Winner Thailand Fang Thai Factory \(GROW\)](#) provides packaging products made from rice that are biodegradable, water, oil, and grease resistant
- [2013 SEED Award Winner India Tambul Leaf Plates](#) produces and markets biodegradable disposable dinnerware made from fallen sheath of the areca nut palm
- [2011 SEED Award Winner Madagascar SEPALI](#) promotes the production and processing of wild silk from moths raised on indigenous trees



Cosmetics (e.g. oil, soap, balm)

- [2019 SEED Award Finalist India Stonesoup](#) offers products to promote and create awareness on zero waste lifestyle, such as cloth pads and stemless menstrual cups, but also cloth bags, beeswax wraps, or wet waste composters
- [2019 SEED Award Finalist Thailand SunnyCotton](#) is producing reusable menstrual pads from locally sourced materials and production processes
- [2009 SEED Award Winner Brazil The Sustainable Use of Amazonian Seeds](#) produces organic certified oils from Amazonian Ucuuba and Andiroba seeds, as well as handcrafted candles that they sell via Beraca to the cosmetic industry



Luxury foods (e.g. coffee, honey)

- [2017 SEED Award Winner Uganda Gorilla Conservation Coffee](#) works with marginalised smallholder coffee farmers living in remote sub-counties bordering Bwindi Impenetrable National Park and sells coffee beans
- [2014 SEED Award Winner India Last Forest Enterprises](#) provides a marketing platform for organic, fair trade, and forest-based products, including honey and beeswax wraps, timber products, but also organic tea, soaps, and handicraft



Furniture and light manufacturing

- [2018 SEED Award Winner India Daily Dump](#) provides waste management products and services, having designed a home composter, adapted for tight urban spaces in unique terracotta design
- [2015 SEED Award Winner Malawi People of the Sun](#) develops handmade homeware items from waste or natural materials, and is working through artisan enterprises in partnership with internationally recognised designers
- [2014 SEED Award Winner Mozambique Piratas do Pau Upcycling Centre](#) trains young Mozambicans as craftsperson or designer in an upcycling centre which designs appealing modern household products, including furniture, soft furnishings, and bags from reclaimed materials

3. DEMAND-SIDE ANALYSIS: SUSTAINABLE GOODS IN THE EUROPEAN UNION

3.1 Current market trends

The demand for sustainable products in the EU has risen in recent years, and is expected to continue doing so (International Trade Centre (ITC), 2019). Indeed, talking to retailers and consumers in France, Germany, Italy, the Netherlands, and Spain, which constitute large markets for sustainable goods, the ITC (2019) finds that 92% expect a rise in sales in environmentally-friendly goods that are traded fairly in the next five years. The ITC (2019) also points to a 2015 survey conducted by The Nielsen Company covering 60 countries worldwide, which shows 68% of consumers are willing to pay a higher price for a sustainable product. This indicates a clear competitive advantage of green products over non-green products. These findings are also backed by numbers of sales in “Fairtrade” and organic certified products (ITC, 2019).

When looking at products that are certified as fairly and ethically traded, company-based fair trade, which captures the entire business, can be distinguished from product-based fair trade, which focuses on the certification of individual products (CEval, 2018). Even though certification plays an important role in making trade to the EU more transparent, the costs for sustainability standards and a lack of information often hinder SMEs in the Global South from participating in such schemes, constituting certification a non-tariff barrier (UNFSS, 2018). Moreover, seals like “Fairtrade” or organic often imply trade in primary (often agricultural) resources for further processing, less the end product targeted at end consumers in the EU.

Generally, taking the German market as an example, reasons for consumers to buy consciously traded products are the prohibition of child labour, the quality of products, and fair wages, while environmental concerns are also gaining importance (Forum Fairer Handel, 2019). Despite rising sales in fairly traded products in Germany, reasons for customers deciding against such purchases include prices perceived as too high, habitual purchases, and scepticism about the credibility of products labelled ethically traded (Forum Fairer Handel, 2019). Still, approximately one in five respondents asked by the Forum Fairer Handel (2019) said that they buy fair trade products at least once a month.

When looking at “Fairtrade” certified products specifically, most consumers tend to buy the products in supermarkets or discounters (Forum Fairer Handel, 2019). In comparison, only about 8% of the respondents buy “Fairtrade” products in the “Weltläden” (Forum Fairer Handel, 2019). What is noteworthy in the context of the “Weltläden” is the fact that stores that operate under the Weltladen Dachverband e.V. are only allowed to procure products from recognised import companies (Weltladen Dachverband e.V., 2019), not from SMEs from the Global South directly. Looking at decreasing numbers of products

sold in “Weltläden”, the Forum Fairer Handel (2019) points to a difficult economic situation of specialised retail shops in general, which can be seen in many city centres in Germany and elsewhere.

While “Fairtrade” certified products show only a slight increase in online purchases (CEval, 2018), sustainable products in general are increasingly bought online. To give a practical example, the online marketplace for „eco-fashion and green lifestyle” Avocadostore, with the mission of offering a sustainable alternative for every conventional product, is growing between 50-60% per year, with a predicted gross goods volume of over 30 million EUR in 2019 (Hüsing, 2019). Reasons for the rising sales of sustainable products through e-commerce include a new and growing young target group for whom ecological aspects are key in purchasing decisions, as well as the global pandemic and the accompanying curfews that have moved many commercial activities online (see e.g. OECD, 2020).

While still putting emphasis on sales in on-site shops, long-established fair trade players are increasingly turning to e-commerce as well. For example, both German fair trade companies El Puente and Contigo run online shops successfully. While sales in fair trade products in Contigo on-site shops declined in 2020, the company observed a large revenue increase in their online business. The Weltladen Dachverband e.V., within which many German fair trade shops “Weltläden” are organised, is also thinking about setting up a webstore. In addition, new partnerships are emerging: the longstanding fair trade company El Puente, for instance, has launched a business-to-business (B2B) e-commerce collaboration with the young brand Folkdays in 2020 to build on synergies between both companies.

In view of e-commerce, besides the long-established fair trade players, young social enterprises such as Folkdays and Manuyoo enter the space for ethical trade by pioneering new approaches. While Folkdays relies on co-creation with independent artisans, family businesses, and local fair trade organisations from Africa, Asia, and Latin America, Manuyoo goes one step further and offers a platform for independent entrepreneurs from Africa to sell their products “made in Africa” in the EU. Based in Berlin, Manuyoo has started its operations in late 2020 with the help of a crowdfunding campaign aimed at promoting exceptional products by African entrepreneurs. Thereby, Manuyoo’s declared objective is to “trade not aid” and keep the highest added value for producers, by selling products in the Manuyoo webstore under the producing enterprises’ brand.

3.2 Target customer groups

Target customer groups in the EU for products offered by eco-inclusive enterprises are composed of different socio-demographic and psychographic factors, such as value attitudes. Generally speaking, a high level of education is a more important determinant of fair purchasing behaviour than, for example, high income (Weltladen Dachverband e.V. und Forum Fairer Handel, 2011). Furthermore, a declining number of consumers buy a fairly and ethically traded product from the Global South “to do something good”, instead appreciate the unique nature, history, and quality of a given product.

While all target customer groups showcase medium to high education levels, other characteristics referring to age, values, aesthetics, and preferences vary (Weltladen Dachverband e.V. and Forum Fairer Handel, 2011). For instance, whereas some target customers might buy products from SMEs in the Global South to act in solidarity, support marginalised producers, and live a sustainable and postmaterialist lifestyle, others might be interested in such products due to individualism, exclusivity, or aesthetics while creating social impact. Given these differences in characteristics, the interplay between the product offered, its price, the place where it is sold, and how it is advertised then determine certain target customer groups.

Target customer groups for products offered by SEED-supported eco-inclusive enterprises in the European Union

 Liberal-intellectual	 Performer	 Socio-ecological	 Adaptive-pragmatic	 Generation Y and Z
40 to 50 years	30 to 50 years	30 to 60 years	Below 40 years	Born after 1980
Highly educated	Highly educated	Highly educated	Relatively well to highly educated	Relatively well to highly educated
High income	High income	Middle to high income	Middle to high income	Diverse income range
Live according to the principles of an achievement-oriented society	Live according to the principles of performance and efficiency orientation	Are sceptical towards economic growth and globalisation, and live according to the principles of post materialism	Look for security, anchoring, and belonging, but at the same time for success and professional establishment	Grew up with advanced technologies, and often shop online
Well-off educated elite that is open-minded and interested in post materialism	Are career oriented and material success is important to them	Are open towards different cultures and “politically correct”	Identify with performance and competitive society	Are concerned about climate change, and look for products that are ecologically sustainable and environmentally friendly
Are career oriented and material success is important to them	Are competitive and cosmopolitan at the same time	Adhere to principles of responsibility and solidarity	Combine liberal, pragmatic, and unideological attitudes	Look for products that offer a solution to a problem
Wish for individualism and authenticity	Have a neoliberal attitude and believe in the freedom of markets	Consume less but sustainably, and live a sustainable lifestyle	Open for new trends	Look for quality, functionality, and uniqueness of products
Allocate time for education, aesthetics, and culture	Look for exclusiveness			

Source: adapted from Weltladen Dachverband e.V. and Forum Fairer Handel (2011) complemented with information from interviews

Five exemplary target customer groups in the EU that may be interested in the products offered by eco-inclusive enterprises from developing and emerging economies include:

- **The liberal intellectual** is a highly educated person in the age⁴ between 40 to 50 years with a high income. While they are interested in post materialism, liberal intellectuals are also career oriented and pursue material success, yet allocate time for education, aesthetics, and culture, and thus look for individualistic and authentic products.
- **The performer** is a highly educated person in the age between 30 to 50 years with a high income. The performer's life strives towards efficiency, and includes career-oriented high performers. They have a neoliberal attitude and do not have a critical stance towards globalisation, they are cosmopolitan and look for exclusive products.
- **The socio-ecological** is a highly educated person in the age between 30 and 60 years with a medium to high income. Being sceptical towards economic
- **The adaptive-pragmatic** is a medium to highly educated person of below 40 years with a medium to high income. Not following any specific ideological values, the adaptive-pragmatic is looking for professional establishment and security at the same time, and is open to new trends and spontaneous, uninformed, yet price-sensitive purchasing.
- **Generation Y and Z** include persons born after 1980, that are relatively well to highly educated, and have grown up being exposed to advanced technologies. Being technically savvy, persons belonging to this target group often purchase products online. As Generation Y and Z are also aware of global issues, such as climate change and inequality, they seek functional products that are environmentally sustainable and ecologically friendly, of good quality, and solve a problem another product may not be able to solve.

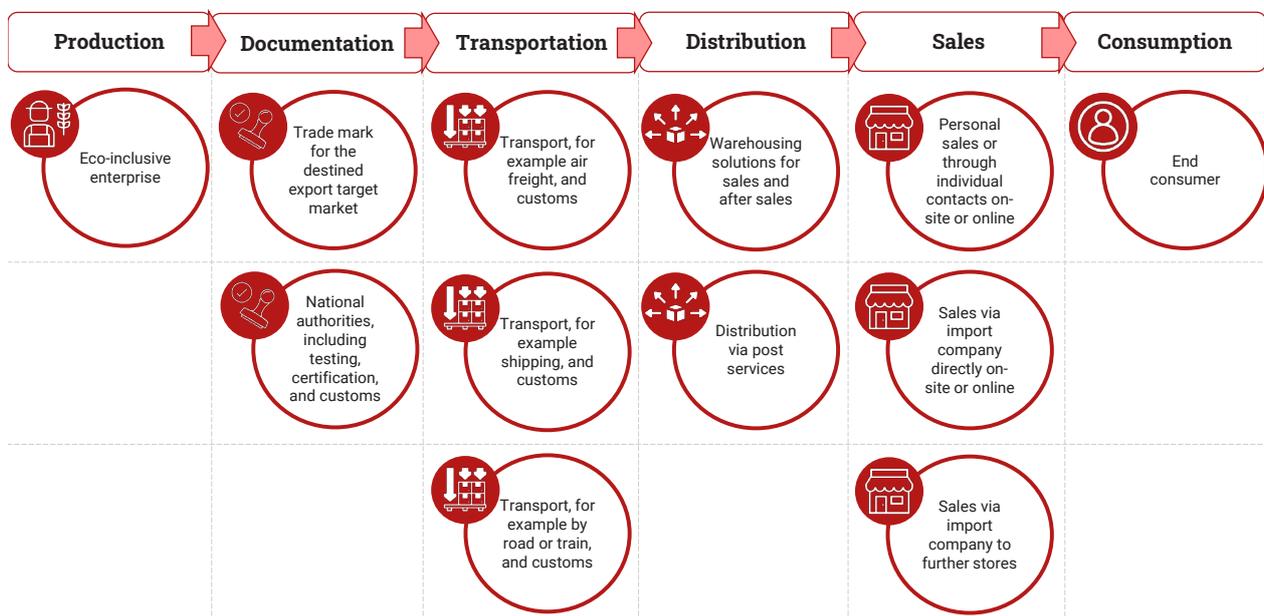
3.3 Value chains and distribution channels

The export value chain results from various opportunities to connect between the eco-inclusive enterprise and the end consumer in the EU. The value chain starts with the eco-inclusive enterprise, which operates either as a company or is channelled through a cooperative, which can obtain raw materials from other actors or, for example, employ artisans or marginalised groups as part of their business model. After having obtained trademarks, export documentation, and having arranged transport modalities, the product can enter the EU market. In some cases, logistics in the EU is subsequently handled by individuals or shops that sell the products to the end consumers directly.

While eco-inclusive enterprises could capture higher profit margins from direct trade, an import partner is usually required to access the EU market. Effectively, online market places such as Avocadostore are not able to source from SMEs in the Global South because they would require somebody taking care of warehousing and after-sales in the EU market. This gap or "missing link" is often filled by fair trade importers, which support SMEs from developing and emerging economies in accessing the EU market with technical and financial support. In return, however, they often require the products to be sold under the fair trade company's brand.

4 Please note that the ages for the liberal intellectual, the performer, the socio-ecological, and the adaptive-pragmatic stem from a report by Weltladen Dachverband e.V. and Forum Fairer Handel, which was published in 2011.

What steps does the export value chain entail?



Eco-inclusive enterprises from the SEED network can export their products through a variety of value chains and distribution channels, but partnerships with corporates or individuals in the target market are key no matter which avenue is chosen. Eco-inclusive enterprises can choose different options to export their products, one of which includes a collaboration with an import company in the country of destination. Such importers can range from profit-oriented wholesalers with a focus on ecological products, and established fair trade importers, to small import entities that are run by individuals. “Business-as-usual” wholesalers often are the less practical option, as higher up-front costs are required than for collaboration with family, friends, volunteers, or specialised fair trade importers.

Import organisations that specialise in fair and ethical trade whose purpose is to support SMEs from the Global South in gaining access to international markets are distinctive in certain characteristics. For example, to be accepted to the list of suppliers of the German fair trade shops “Weltläden” that are associated under the Weltladen Dachverband e.V., an importer has to 1) maintain long-term relationships with the producers, 2) not engage with intermediate trade, 3) guarantee an advance payment of at least 50% upon request of the producers, and 4) ensure that goods deliveries are paid for promptly (Konvention der Weltläden, 2019). Indeed, in many cases, importers support enterprises in the form of advance payments and the organisation of logistics.

While partnerships between fair trade companies and producers used to be established, for example, during travels or trade fairs, nowadays importers are approached by an ever-increasing number of interested suppliers. As fair trade importers are cultivating long-term partnerships with their suppliers, the number of potential collaboration is limited due to two reasons. First, fair trade importers are potentially less interested in collaborating with enterprises that offer products similar to already established partnerships to avoid competition. Second, fair trade companies are often family-owned businesses that are not necessarily profit-oriented, but value driven. To elaborate on this statement, a fair trade importer pointed to the fact that their profit margin is comparatively low and that no profit has ever flown out of their own fair trade company, but has been reinvested into the company’s purpose.

Besides specialised fair trade importers, there are classic, profit-oriented companies from the wholesale sector that import ecologically sustainable products. The downside for SMEs from the Global South working with these companies is that they often cannot guarantee advance payments and are unlikely to support with logistics, relying on the producers to get their product to them. Given these limitations, such partnerships are often unfeasible for SMEs in the Global South. At the same time, a wholesale company might deem it risky to invest in quantities of a product by SMEs required to fill an air freight or a shipping container. One solution that would address this problem is to bring together various wholesalers and organise joint orders per country of origin.

How Gorilla Conservation Coffee exports to the United Kingdom



Enterprise Profile

Gorilla Conservation (GC) Coffee pays a premium price to enable marginalised small-holder coffee farmers living in remote sub-counties bordering Bwindi Impenetrable National Park to improve their lives, which keeps them from resorting to damaging the forest through activities like poaching and removing resources like wood. This in turn helps protect the gorillas and their habitat. GCCoffee also provides training and capacity building to farmers to improve sustainable agriculture practices. GCCoffee targets coffee drinkers and tourists via shops, tourist lodges, airports, and international distributors to market and sell coffee.



Key Success Factors

- Personal and individual contact
- Real life tasting and quality experience
- Protection of product trade mark



Key Challenges

- Local partner in export target markets
- Upfront payments for transportation
- Producing sufficient product quantities

Collaboration between 2017 SEED Award Winner GCCoffee and Moneyrow Beans

GCCoffee’s export journey started when an individual from the United Kingdom tasted their coffee while traveling and was convinced of its taste and quality, remembers Lawrence Zikusoka. While GCCoffee has already received **certification from national coffee bodies and secured trade mark** for the EU, Switzerland, and the United States, so far they are only exporting their coffee to the United Kingdom with the help of Moneyrow Beans, whom are placing orders every month. Even though the legal and regulatory frameworks would be set for further export destinations, the enterprise is still looking for partnerships to export to further countries for which they would **need in-country partners** with an interest to collaborate with them. Having protected their product, the enterprise requires distributors which buy their coffee in advance, as **upfront payments for shipping are quite high**, and to whom they can send their purchase orders.

How Last Forest exports to the European Union



Enterprise Profile

Last Forest focuses on developing the market for untapped and under-valued sectors. By providing a marketing platform for organic, fair trade, and forest-based products, Last Forest increases the demand for organic agricultural production and offers indigenous communities a sustainable source of income. Products include honey, timber products, garments, organic tea, and handicrafts.



Key Success Factors

- Delegation trip for partnership formation
- WFTO membership and certification
- Time to sort out export documentation



Key Challenges

- Export documentation for individual products
- Costly testing procedures per product
- Fulfilment of certain testing parameters

Collaboration between 2014 SEED Award Winner Last Forest and El Puente

The 2014 SEED award-winning eco-inclusive enterprise Last Forest has been **involved in the fair trade movement** in India for several years, but has only started to export to Europe in 2020. During a **delegation trip** to Germany organised by Eine Welt Leipzig e.V., Last Forest had the opportunity **to visit the El Puente headquarters and meet relevant decision makers**. Since then, Last Forest's products have been promoted by El Puente in the form of gift packages at the Ambiente trade fair in Frankfurt am Main, for example.

In the summer of 2020, in the midst of a global pandemic, Last Forest made its first delivery to El Puente in Germany. Whereas the **first delivery** was an **air freight**, the **second order**, which will include soaps and other personal care products, will be **delivered by ship**. In addition to El Puente, Last Forest is also in contact with importers in the Netherlands (private individual) and Austria (EZA). To date, Last Forest has exported beeswax food wraps to Germany, which are sold through El Puente, and are even available online at Avocadostore, the marketplace for sustainable products.

Last Forest describes the **delegation trip and meeting relevant decision-makers as an important first step building confidence between the trading partners**. In the follow-up process, Last Forest **took care of all documents required for export in India, which are preceded by a costly testing procedure and the fulfilment of certain parameters**. The logistics and customs costs also mean that the price of the products for export is approximately five to seven times the domestic price. Last Forest benefited from the fact that during the pandemic everything was a bit slower and the company had enough time to find out what was needed for the **export documentation, which varies from product to product**.

After the product is delivered to Europe, El Puente takes over. According to Last Forest, it is essential for the import company that the **products come from fair trade and that this is demonstrable**. Last Forest is a member of the WFTO, for instance, and is allowed to identify itself as a member of the organisation that fulfils certain principles. This means that El Puente as well as customers in Europe know that they can trust Last Forest as an ethical company that adheres to fair trade standards. In the end, there is a product from El Puente on the shelf, but the label also contains information on the producer the product is procured from.

How All Women Recycling exports to the European Union



Enterprise Profile

All Women Recycling sources discarded plastic bottles from landfills, street waste collectors, and collection points located in schools around Cape Town. Female employees of All Women Recycling craft the bottles into unique gift boxes, known as kliketyklikboxes, which serve a worldwide niche market. Collection vehicle drivers, dump site sorters, and street waste collectors profit from having additional sources of income. The process of recycling plastic bottles raises awareness of environmental concerns, keeps townships clean, and contributes to mitigating climate change.

Key Success Factors

- Product's story and saleability
- Fair and transparent value chains
- Triple bottom line impact

Key Challenges

- Product branding and marketing
- Scaling product quantities and volumes
- Expanding sales and distribution channels

Collaboration between Contigo and 2014 SEED Award Winner All Women Recycling

The former managing director of Gepa, Europe's largest importer of fair trade food and handicraft products, Ingo Herbst, founded Contigo in 1994. He founded the company with the aim of distributing stylish and high-quality products, especially from the non-food sector, which might be too expensive to sell in traditional fair trade shops "Weltläden". Although the company, which generated a turnover of EUR 10.5 million in 2019, shows increasing sales year after year, Ingo Herbst describes the company's business model as an alternative economic model, with an average profit margin of two per cent. **Fair trade products from partners in the Global South are not only imported by Contigo, but product and export advice and support are also provided.** They engage in such **close partnerships** that even during the COVID-19 pandemic no orders were cancelled.

Contigo finds their partners via development aid organisations, the internet, exhibitions, visits, trips, or on recommendation. After the contact is established, the social enterprises **send an initial sample, upon the success of which an audit process (self-assessment) begins.** If this self-assessment is successful, a **Basic Agreement on Fair Trade is signed**, which includes the 10 principles of Fair Trade (as per the WFTO). Subsequently, the data is recorded in the Contigo Fair Trade System (CFTS, <https://fairtrade.contigo.de>), the first publicly visible and traceable **fair trade record**, and **replaces any fair trade certificates.** The data is monitored and updated in regular intervals. Monitoring also takes place through regular personal visits to the production sites.

Contigo operates a number of brick-and-mortar shops, but also an online shop whose turnover has tripled in 2020 alone (interview, as of autumn 2020). The **main challenge** is not described as purchasing, but rather **marketing the products, scaling the volumes, and expanding the channels.** In many cases, Contigo has been working with its trade partners for 20 years, since 2010 with the SEED award-winning project All Women Recycling, which upcycles PET bottles to gift products in South Africa. **Contigo is convinced of the idea and the product, the working conditions, but also the fulfilment of the triple bottom line:** fighting poverty, promoting women, and upcycling to protect the environment. In fact, in the end, the **story of the producer also plays as much a decisive role in successful sales in Europe as the transparency along the value chain**, according to Ingo Herbst.

4. SUPPLY-SIDE ANALYSIS: ECO-INCLUSIVE ENTERPRISES FROM THE GLOBAL SOUTH

4.1 Partnerships with stakeholders in the target market

Eco-inclusive SMEs identify the establishment of partnerships in target countries as one of the most important steps for a successful export to the EU, but also as a major obstacle. There are various ways for eco-inclusive enterprises to establish partnerships, for example travel, personal contacts, friends, family, and volunteers, but also development programmes or memberships in fair trade initiatives. These contacts are not only necessary for the SME to gain the trust of consumers in the EU market in their product, but to gain market knowledge. Established entities, including fair trade companies, are trusted by the end consumers, which facilitates market entry for eco-inclusive enterprises.

The import partner in Europe, the enterprise itself, or both working together organise the logistical process sending the goods to Europe, where the import partner then takes over to store, distribute, and sell the products. The eco-inclusive enterprise procures necessary materials for production and is responsible for all processes that are related to the production of the end product. Then, in most cases, the enterprise takes all necessary measures in the country of origin, such as documentation and testing required for export, but also secures trade mark in the export target country. At this stage, it becomes relevant to calculate production capacities and product quantities in order to determine the pricing strategy, which has to capture costs for documentation and logistical processes needed for export.

Eco-inclusive enterprises face several hurdles, which partnerships with local entities in the European market can help mitigate. One challenge related to exports is the provision of required product quantities needed to fill an air freight or shipping container. Collaboration with import partners often helps eco-inclusive enterprises to secure orders in advance, which in combination with advance payments ensures planning reliability. Besides the provision of a certain quantity required for exports, eco-inclusive enterprises need time and internal capacity to gather relevant information on documentation required

for their export activities, such as quality confirmation through testing or an export permit, and calculate prices. If only a small quantity of a product is to be traded, it is often not worth going through bureaucratic processes for individual product groups.

In the context of fair and ethical trade, specialised importers not only help to secure the supply of goods, but also support enterprises with additional services, e.g. product design advice, export advice, material advice, advice on product and labour safety, timely information on developments in sales markets, but also financial support such as advance payments. The logistical support often includes the organisation of an air freight or shipping container, warehousing, storage, marketing, and distribution in the target market. Logistical support along transport routes can also be case-specific as Manuyoo's experience shows; the Berlin-based team points to the issue that transport routes connecting the African continent with Europe are still rare, making existing ones costly, yet again highlighting the relevance of SMEs local in-country knowledge on service providers available on such routes.

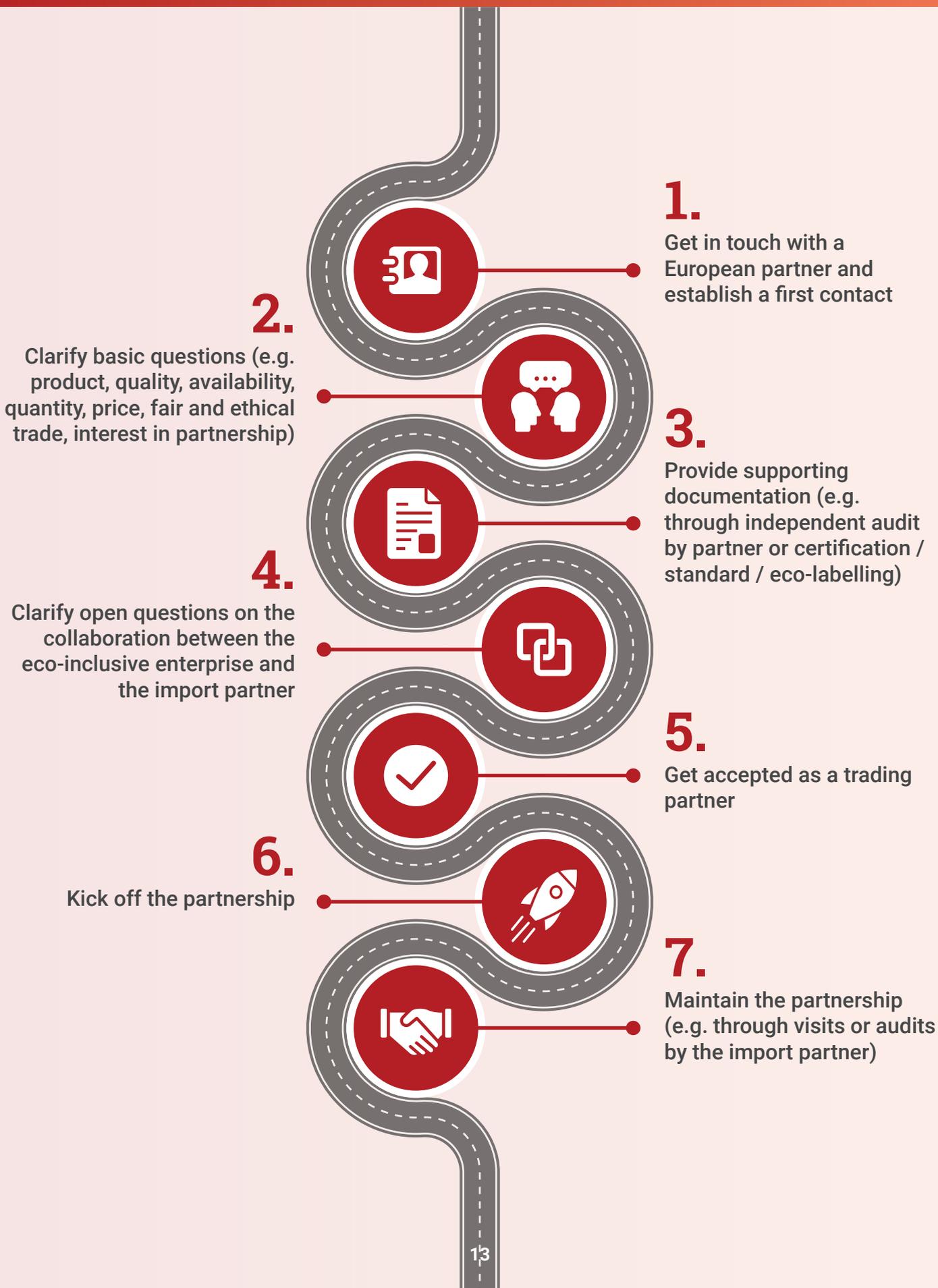
While collaboration with established import companies eases market access for SMEs from the Global South, a small group of eco-inclusive enterprises is exporting with the help of individuals based in the target market. For example, Gorilla Conservation Coffee is cooperating with a boutique coffee importer selling their products under the Ugandan enterprise brand, and Kibébé is collaborating with friends and volunteers who help sell their products through their very own webshop in the United Kingdom and the United States. Gorilla Conservation Coffee relies on upfront payments for shipping, while Kibébé works with its partners on commission. Hence, thinking about potential collaborations, it is key to consider costs and benefits of different partnership forms, taking into account product availability and quantity, quality assurance, prices, and logistical support needs.



Sunny Cotton, Thailand

The road to partnerships

How a partnership with a European importer can be formed



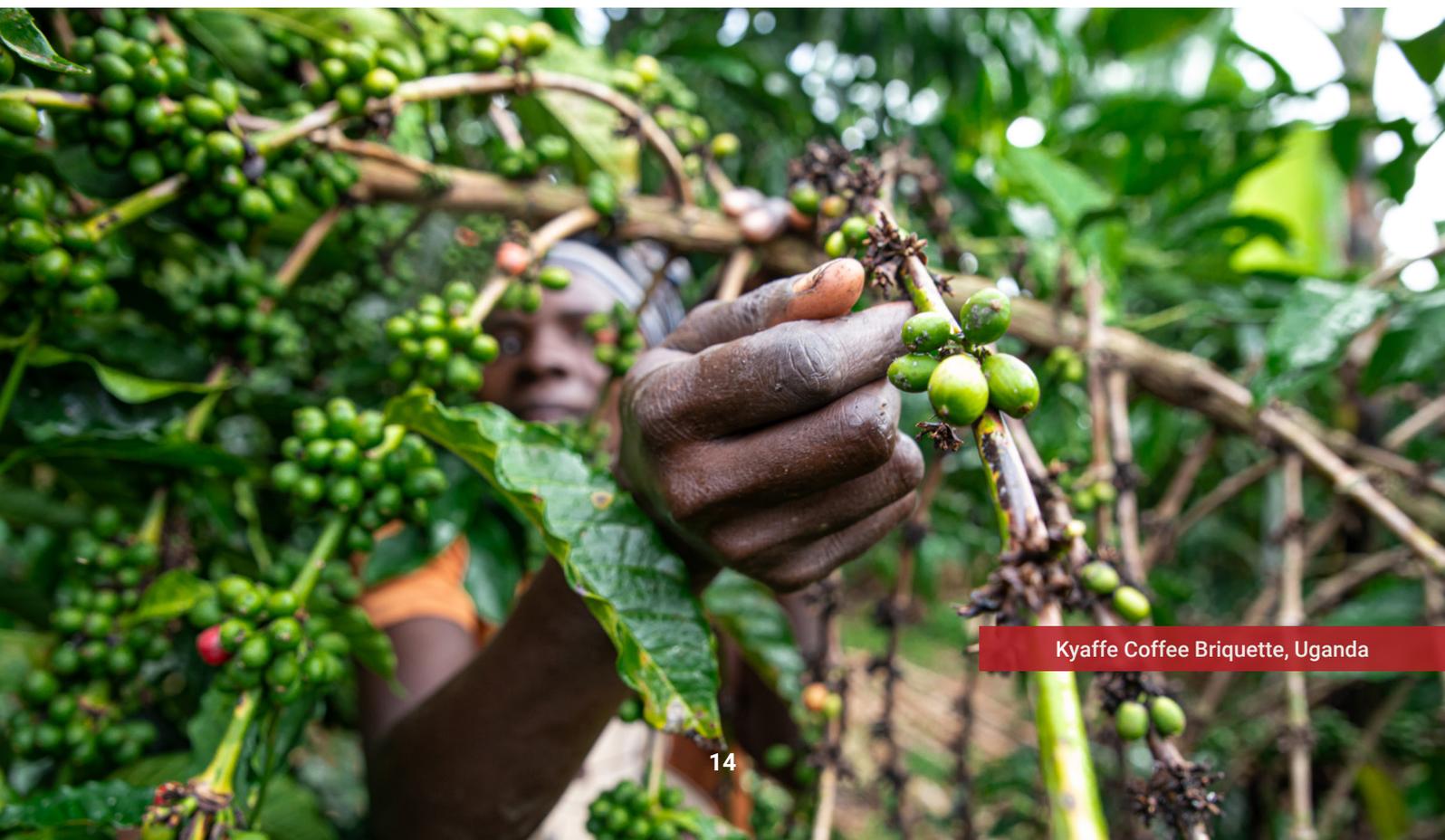
4.2 Rising potential of e-commerce

In addition to the option of accessing the EU market with the support of import partners, there is the possibility of operating an own online store or using existing digital structures and platforms to reach new markets. Indeed, Africa's e-commerce market, for example, was projected to rise from USD 8 billion in 2013 to USD 50 billion in 2018 (ITC, 2016), offering an opportunity to disintermediate trade and directly connect businesses to consumers nationally and internationally, even from landlocked countries. However, SMEs from developing and emerging economies often face hurdles such as lack of access to international payment facilities, few affordable and reliable logistics service providers that ship directly to the consumer, lack of access to appropriate technologies, as well as required financial and technical support in overcoming legal, regulatory, and customs hurdles (ITC, 2018).

If feasible, for enterprises to overcome challenges in e-commerce, the ITC recommends setting up international business structures or a registered company in a foreign jurisdiction (ITC, 2020). According to the ITC (2020), this would enable the enterprise to access services only available to local enterprises, direct market access, better import process control, control of distribution channels, and better logistics and returns management. However, in the case of eco-inclusive SMEs, the enterprise might just start diversifying markets and expanding internationally, which would probably not justify the costs incorporating in a foreign market through a formal entity would entail, rendering this option unrealistic in many cases.

If setting up company structures in foreign markets is too expensive, another option is to a) operate from the country of origin as a single seller or b) work through a representative partner in Europe. Both options are practiced by eco-inclusive enterprises from the SEED network; whereas Last Forest, All Women Recycling, Gorilla Conservation Coffee, and Kibébé sell online through partners that are based in the target market, Mycotech and Stonesoup sell online from their country of origin. Generally, the difficulty of accessing e-consumers in European markets can be determined by looking at the ease of exporting, EU trade agreements, access to payment service providers, access to EU marketplaces, foreign exchange controls, costs of human resources, production, logistics costs of operating in the EU, and the type of jurisdiction suitable (ITC, 2020).

Besides setting up an own web shop, it is possible to sell products at online marketplaces, which require enterprises to compare the different solutions and customer targeting offered by individual platforms. There are different online marketplaces an enterprise can work with, depending on the product offered and resources available. Common marketplaces to reach new customers in the EU market are ebay, Amazon, and Etsy, for example (ITC, 2016). Comparing their registration and verification procedures, access to value-added services, non-requirements of value added tax (VAT) registration, local return requirement, and key performance indicators (KPI), SMEs can choose what platform best suits their operations, capacities, and export endeavours (ITC, 2020). Whereas this option entails less technical knowledge than maintaining an own web shop, it comes with high shipping and warehouse fees, and the need for marketing, which renders this option costly and often unrealistic for eco-inclusive enterprises.



Kyaffe Coffee Briquette, Uganda

Tapping into e-commerce

Factors to consider when moving sales online



1. Look at different potential target countries and compare the ease of exporting, trade agreements, foreign exchange, jurisdiction, and logistics costs
2. Compare access to payment service providers and access to marketplaces
3. Decide whether to operate an online shop using e-commerce platforms or to sell via existing online marketplaces and retailers
4. Compare different platforms regarding registration and verification procedures, access to value-added services, non-requirements of VAT registration, local return requirement, and key performance indicators
5. Choose platform that suits your operations, capacities, and export endeavours

Source: adapted from ITC (2016, 2020), complemented with information gathered through desk research

Examples: E-commerce support structure

Online marketplace

- **eBay** is an online auction site with operations in many countries around the globe. Sellers need to pay a fee when they list an item and when they sell an item, the size of which depends on the product category. Buyers can access the auction site for free.
- **Amazon** is an e-commerce retailer with operations in a plethora of countries. Enterprises need to pay a fee to feature and list their products on the webpage. Warehousing and order fulfilment, including customer and return service, can be provided by Amazon.
- **Etsy** is an online marketplace that focuses on handmade, vintage, and craft items, including jewellery, bags, clothing, home decor, and furniture. Etsy charges a commission for each item and for each transaction.

E-commerce platform

- **Shopify** is a popular e-commerce platform that more than one million people use for the creation of their webshop. It is user-friendly and offers different plans starting from USD 29 per month. The platform with different payment and shipping options is useful for small enterprises, but can grow along.
- **WIX** is a user-friendly e-commerce platform that is useful for small enterprises, as it does not come with transaction costs. Plans start from EUR 20 per month. The webshop can be connected to social media and online marketplaces. Yet, it does not include a merchandise management interface.

How enterprises from the SEED network make use of e-commerce



Mycotech

Indonesia

2019 SEED Low Carbon Award Winner



Learn more about Mycotech

2019 SEED Award Winner Mycotech has been operating a webstore, [myclstore](#), since summer 2020, from which the eco-inclusive enterprise sells individual products made from their vegan mushroom leather abroad. However, the company emphasises that the main **objective of setting up the webstore is to serve as a showcase for their products**, with the aim of building larger partnerships with business-to-business (B2B) distributors in other countries. The secondary objective is that business-to-consumer (B2C) buyers make use of the webstore. The enquiries and statistical records of the webstore prove that there is worldwide demand for Mycotech's products, with about 30 per cent of the orders coming from Europe. **Target countries in Europe include the United Kingdom, France, Germany, Switzerland, the Netherlands, and Portugal.** From the experience of trade relations already established with collaborators in Japan, Mycotech knows that **it is important to 1) do market validation, calculate cost structures, and find distributors as well as 2) extend the trademark into the region** they aim to export to.



Stonesoup

India

2019 SEED Low Carbon Award Finalist



Learn more about Stonesoup

2019 SEED Award Finalist Stonesoup is also trying its hand at exports via e-commerce. To this end, they are testing an expansion of their online store operating in India in the United Kingdom, as well as **distribution via Amazon in the United States**. So far, the team is focusing on exporting menstrual cups. The company has already set up the infrastructure on the Indian side, the logistics have been clarified, and necessary permits have been obtained. However, they have **not yet gained sufficient market knowledge about the European market, e.g. about CE certification**. In regard to exports through existing platforms, the company has found distribution via Amazon to be very costly for the following reasons: Without sufficient advertising in the target market, the product sits for a long time in **Amazon's warehouses, for which fees have to be paid**. Also, shipping the products is quite costly in general, which can lead to a **shipping fee that is almost as high as the product price**. Hence, according to Stonesoup, partnerships will be key to improve the export journey and generate market insights.



Kibébé

Malawi

2019 SEED Africa Award Finalist



Learn more about Kibébé

2019 SEED Award Winner Kibébé is running webstores for their lifestyle products in the United States and the United Kingdom. One platform they make use of is **"Shopify", which they operate with the help of friends and volunteers that are living in the country** they are shipping to. It is also the relationship to these friends that spread the word and reach new customers. As key steps in setting up a webstore for export Kibébé describes the following: **1) register the organisation, 2) obtain a trade mark, 3) get local directors and trustees on board in the target market, 4) research labelling requirements in the target market, 5) find storage space for inventory**. One option to raise money for export produce and stock Kibébé describes is **crowdfunding**, with the help of which enough stock for initial shipping can be produced. In this case, the helpers pay the enterprise upon successful wholesale. **Two challenges** the enterprise describes in the context of exporting via e-commerce are **proving consistent quality control of products** and, if exporting via friends and volunteers, **having enough storage**.

4.3 Certification and transparency along the value chain

Accessing international markets like the EU market sometimes requires an enterprise to qualify for public or private certification and sustainability standards. The assurance the certification brings that social and environmental standards are adhered to along the value chain is a door opener to reach international clients. In reality, however, SMEs in developing and emerging economies face barriers in implementing certification and sustainability standards, especially due to limited access to information on the requirements and high costs for introducing and maintaining such standards (see e.g. UNFSS, 2018). Furthermore, a plethora of available certification schemes has emerged over time, making it difficult for an enterprise to choose a (voluntary) standard, and affecting the credibility and trust of certified products (UNFSS, 2018).

Contrary to certification that refers to a specific product, such as “Fairtrade” or organic seals, the World Fair Trade Organisation’s (WFTO) Fair Trade Standard focuses on the management and operation of a social enterprise as a whole. The WFTO was founded in 1989 and nowadays consists of 364 members that are social enterprises fully practicing fair trade according to ten principles, including opportunities for disadvantaged producers, transparency and accountability, neither child labour nor forced labour, gender equity, good working conditions, and respect for the environment (see e.g. Doherty et al., 2019). Enterprises that aim to obtain the “Guaranteed Fair Trade” designation usually become a (paid) member of the organisation, and continuously submit self-assessment reports, and undergo independent audits as well as peer reviews. 2014 SEED Award Winner Last Forest from India is WFTO certified and describes the membership as one key factor that helped them build new partnerships with importers from Europe.

While enterprises such as Last Forest point to the WFTO standard as an important success factor in their export journey towards the European market, there are also voices criticising the WFTO standard and certification more broadly. In fact, despite having previously been a member, Contigo (2018) is now critical of the WFTO, as it is a membership-based organisation offering a voluntary sustainability standard without public mandate. As the WFTO is not a public body, Contigo hence questions the legitimacy of such a standard as an often necessary precondition to enter international markets, which in turn potentially discourages new groups to export (Contigo, 2018). Alternative pathways can be observed in practices by Contigo, an importer who collaborates with 2014 SEED Award Winner All Women Recycling from South Africa and has established an independent transparency system with its partners, or Manuyoo, whose team has selected few entrepreneurs and products they aim to support in their export journey to Europe individually.

Several initiatives have emerged to help entrepreneurs from the Global South collect information about international markets in general and the European market in particular, including the International Trade Centre (ITC) and the Centre for the Promotion of Imports from Developing Countries (CBI) that is run by the Dutch Ministry of Foreign Affairs. For instance, the ITC Market Access Map provides information on import and export requirements and allows the analysis and comparison of different markets, competitors, and products, but also trade agreements. The Standards Map, another tool offered by the ITC, lists information on mandatory and voluntary sustainability standards. Moreover, CBI provides export coaching, technical support for business development service providers to assist their members with exports, market information on specific sectors with export potential in Europe that is publicly accessible online, including trends and necessary framework conditions such as certificates.



Amaati Group, Ghana

5. OPPORTUNITIES AND CHALLENGES

Opportunities



- **Demand for sustainable products from the Global South in EU markets is on the rise**

The present analysis shows that the demand for fairly and ethically traded green products offered by eco-inclusive enterprises from the Global South in the EU exists and is increasing. This becomes clear not only by looking at data on recent developments in the context of fair trade, but sustainable goods more broadly. Products by eco-inclusive enterprises from the Global South with high export potential include artisan and handicraft products, upcycled and recycled material products, sustainable fabrics and alternative materials, cosmetics, luxury foods, as well as furniture and light manufacturing.

- **Variety of target customer groups for sustainable products from developing and emerging economies**

Besides target customer groups that are known to consume fair trade products, including for example liberal intellectual and socio-ecological customer personas, generation Y and Z increase the diversity of customers demanding sustainable products. Customers can be accessed by communicating the individuality, quality, and positive impacts along the triple bottom line of the respective product and deploying appealing design, storytelling, and visual marketing and communication material.

- **Growing number of potential import partners**

Numerous import companies and individuals, on-site stores and an increasing number of online shops are involved in the sale of eco-inclusive products from the Global South to end consumers in the EU, depicting a variety of distribution channels available to eco-inclusive enterprises for export. Specialised fair trade importers in particular avoid intermediary trade to be able to pay reasonable prices to eco-inclusive enterprises.

- **Rising potential in e-commerce, both through own web store or online marketplaces**

While fair trade importers postulate to disintermediate trade, they still constitute another actor in the value chain that hinders direct trade between the eco-inclusive enterprise and the end consumer in the EU market. Maintaining an own web presence or selling products through online marketplaces constitutes an opportunity to diversify markets and create a strong presence for the enterprise brand in new geographies.

Challenges



- **Need for collaboration with import partners to be able to access EU markets**

While many on-site stores and online shops would be interested to sell products from eco-inclusive enterprises, they are often not able to import themselves and provide the “missing link” needed to get the product from the enterprise to the store. Instead, they rely on import companies for purchasing, which restricts the sales channels of SMEs from the Global South in the EU to certain importers which are able to provide them with required support.

- **Upfront payments for pre-financing, customs, transport, and warehousing**

Eco-inclusive enterprises are often not able to invest huge sums into logistics that would be required for collaboration with general importers and wholesalers. Gaps that specialised fair trade import partners often have to fill are related to pre-financing, customs, transport, and warehousing. Therefore, it constitutes a realistic option for eco-inclusive enterprises to make use of existing structures and collaborate with such importers. Yet, collaborating with established fair trade importers often implies giving up brand identity, and having products sold under the importer’s brand, only mentioning the eco-inclusive enterprise as the producer.

- **Access to market information and support in branding, design, marketing, and storytelling**

Besides logistical challenges, eco-inclusive enterprises also have difficulties to access market information to make pricing strategies, plan their deliveries, and get their message out to the market. This implies that, without an import partner in the target market, it is more difficult to understand and reach potential customers. No matter which entity supports the eco-inclusive enterprise in the target market, enterprises often rely on research support concerning regulations and consumer safety, but also market developments and potential business partners.

- **Scaling product quantities and volumes while keeping quality**

While independent fair trade shops exist, these cannot serve as a key target customer group, as such shops are often price sensitive and not able to order in large bulks, which render them cost-inefficient for eco-inclusive enterprises. Before having set up partnerships with large orders, enterprises often have to use air freight for small quantities which is costly and not environmentally friendly. Once enterprises are able to ship, they still need to be able to ensure quality and product availability, which may be influenced by external factors like extreme weather events or the pandemic.

- **Barriers related to e-commerce**

Eco-inclusive enterprises use e-commerce to access new markets, e.g. either to analyse the potential demand or to fully tap into the market. If the enterprise considers using e-commerce for B2C activities, it might be relevant to have a warehouse in the target market, as storage solutions by online marketplaces come with high costs. Besides high holding costs for product storage, other challenges related to B2C e-commerce include access to international payment facilities and affordable transport. A lack in technical knowledge when operating an own web shop constitutes a challenge, in addition to legal, regulatory, and customs requirements.

- **Certification, testing, and export documentation for different product categories requires research and time commitment**

While public standards can be made mandatory to access foreign markets, including safety standards that would need to be met, voluntary sustainability standards can help an enterprise gain a green competitive advantage. Yet, for SMEs from the Global South, both are difficult to obtain due to a lack of access to information and finance. Therefore, certification, in addition to customs and other (non-) tariff barriers, often constitute hurdles for SMEs from the Global South that look to access international markets.



Kibebe, Malawi

6. INSIGHTS ON SUPPORTING SMEs IN ACCESSING NEW MARKETS

Looking at existing SME support in the context of market access to the EU, insights on how to support eco-inclusive enterprises from the Global South in their export endeavours can be derived.

Current initiatives make use of webstores and (virtual) trade fairs, including showcases and matchmaking, to connect enterprises from developing and emerging economies to European markets, and sometimes offer business support as well.

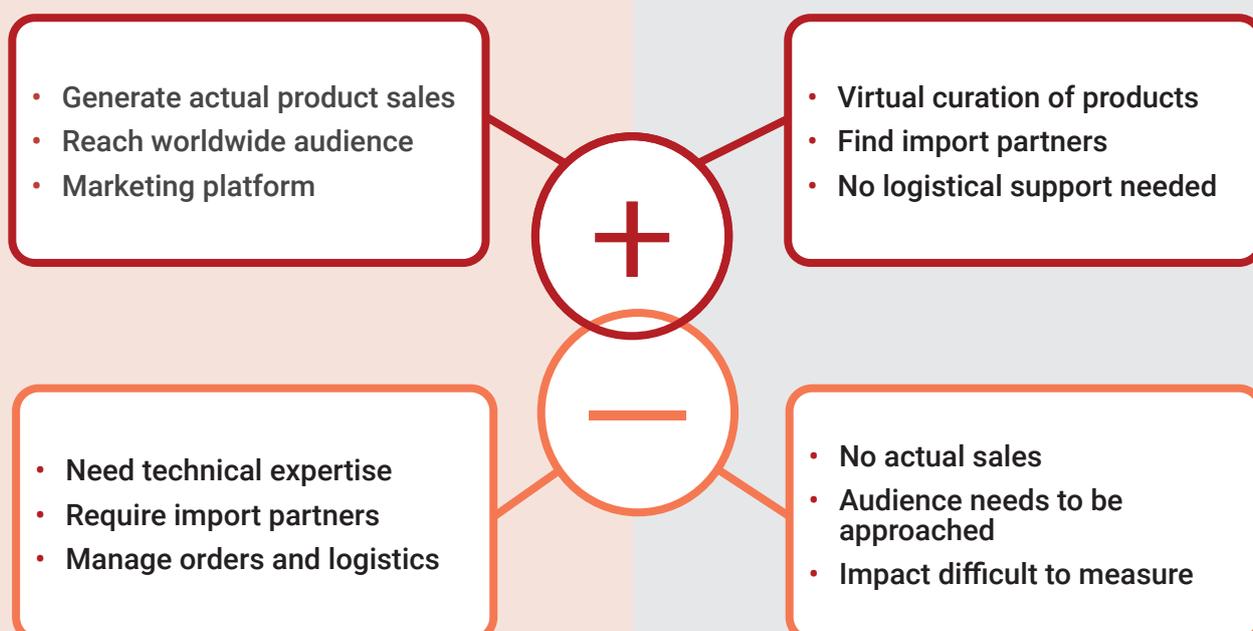
One key solution on the level of enterprise business support is the setup of a (virtual) trade fair that helps eco-inclusive entrepreneurs find partners in their destined export target market. Examples for virtual trade fairs include curated webpages like “Beyond Beautiful” by the WFTO, but also matching platforms like leverist.de. The virtual curation of individual products has the advantage that no logistical support is required on the programme level. On the other hand, the direction of relationships formed cannot be influenced, which makes it difficult to measure the positive impact of such an activity. While the virtual trade fair could help SMEs to access a worldwide audience, this audience would need to be made aware of the product catalogue proactively and does not guarantee sales.

Another essential solution is setting up a curated webstore for individual products of enterprises with a limited geographic reach and a fixed time window. Examples include the shops of White Label Project, MADE51 by UNHCR, or Manuyoo. The advantage of a webstore, similar to the virtual trade fair, is the creation of a global marketing platform that speaks to a wide audience. For this platform to work, it will need to address the “missing link” in import, taking on centralised import to Europe, logistical processes, pre-financing and other payment modalities, warehousing, distribution, and aftersales, underpinning the need for an import partner. From the point of view of enterprise business support, it might thus make sense to work on a webstore for SMEs for a certain geographical region for a given period of time.

Complementing other support activities, current initiatives engage in capacity building measures to support SMEs to tap into new markets, addressing challenges revolving around necessary prerequisites concerning partnerships, certification, e-commerce, among others.

WEBSTORE

VIRTUAL TRADE FAIR



Export support for SMEs from the Global South

VIRTUAL TRADE FAIR

WORLD FAIR TRADE ORGANISATION (WFTO)

Tackling the challenges posed by the COVID-19 pandemic, such as movement control restrictions and related shutdowns of business, the **World Fair Trade Organisation (WFTO)**, a global community of over 1,000 social enterprises and 1,500 shops (as of 2021), and verifier of social enterprises that fully practice fair trade, is breaking new ground to increase the visibility of their members. Indeed, the WFTO has recently started the implementation of a one-year project “**Beyond Beautiful**” funded by Isabel Martín Foundation that serves as a **virtual trade fair and exhibition of individual products**. The **debut collection** follows **different categories** curating a **selection of products** by social enterprises from the WFTO network. While promoting inspirational stories of enterprises that put people and planet first, the project aims at **reaching retailers and importers** wishing to expand their offer. The webpage incorporates **background information and contact details** of the enterprises that offer a respective product. Focusing on craft artisans, the debut collection of “Beyond Beautiful” includes woodwork, ceramics, weaving, metalwork, basketry, and embroidery, for example.

FAIRLING

FAIRLING describes themselves, a start-up in retail tech, as the **digital trade show** of the 21st century offering a **virtual matchmaking application** that is cost-effective, flexible, and **available throughout Europe**. It targets brands that offer products in the fields of design and gifts, fashion and accessories, living and interior, cosmetics and beauty care, paperware and stationery, baby and kids. Enterprises apply to get access to the platform with a **monthly subscription**, on which they can be found by and get in touch with wholesalers and retailers from major European cities.

LEVERIST.DE

The **matchmaking platform leverist.de** aims to **bring together companies and service providers from around the globe with cooperation partners from the Global South, being supported by organisations active in international cooperation**. The platform states that it aims to ease access to new markets meanwhile creating opportunities for local development. Creating mutual benefits, leverist.de postulates that the platform’s purpose is **to create reciprocal exchange**: On the one hand jewellery importers from the EU might be interested to collaborate with the artisan scene in Namibia to source new goods, on the other hand further companies might offer their expertise for the implementation of biodiversity-friendly agriculture solutions in a given country.

FAIRE.COM

Faire.com promotes **local retail activities** by supporting independent entrepreneurs, from artisan to shopkeeper, through an **online wholesale marketplace**. Thereby, the platform connects small business owners with independent brands to buy and sell online at wholesale rates.

WEBSTORE

WHITE LABEL PROJECT

White Label Project is a **virtual community platform and web shop** that promotes direct value chains by **curating and selling sustainable fashion and interior design brands** mainly from the Global South. The project currently works with more than 20 sustainable design brands that again work with more than 1,200 crafters and creatives across 11 countries. White Label Project is funded by the Vinnova, Sweden's Innovation Agency, and operates from a warehouse in Stockholm.

MADE51 BY UNHCR

The project **MADE51 by UNHCR**, the global organisation dedicated to saving lives, protecting rights, and building a better future for refugees, forcibly displaced communities, and stateless people, pairs refugee artisans with social enterprises to "design, produce, and market" artisanal home décor and accessories to international markets. It thus is a market-based instrument that supports the creation of livelihoods for both refugee artisans and their social enterprise partners, and promotes their inclusion in **global value chains**. With the help of strategic partners, the project adds technical expertise and builds capacity to bring the MADE51 collection to life. Within the partnership, the social enterprise **manages orders, production, and logistics**, for which they are also supported through the provision of a business toolkit and legal advice. Using their **global reach**, MADE51 as a brand offers a **marketing platform that curates, brands, and presents** the artisanal product lines to a **worldwide audience**. For that purpose, MADE51 is also running a **webstore** through which orders can be placed. Orders are subsequently distributed by an import partner.

MANUYOO

Using crowdfunding, the **social start-up Manuyoo** from Berlin has created a **webstore** with the aim to **promote the sales of products made in Africa in the EU**, meanwhile working towards diverse and inclusive trade on eye level. Tackling the issue that less than 10% of imports to Europe are imports from Africa, and the majority of imports being primary goods, with value creation not staying where resources come from, Manuyoo aims to provide a "stage" for showcases, which helps African entrepreneurs to sell their products, including sneakers, dried mangoes, or chocolate, at the European market. Lessons learned after the first imports include that **imports and transport routes from Africa are still rare and thus costly**, that **local partners might know local logistic chains best**, and that **shipping containers, which would be less expensive and more sustainable than air freight, are difficult to fill with small product volumes**.

SOKO

SOKO is a San Francisco-based start-up that was founded to **include artisans from Kenya in global value chains**. It is a **women-led ethical jewellery brand and tech-powered manufacturing platform** that aims at putting people first. They describe themselves as a virtual factory that works via **mobile applications** developed to connect artisans from Kenya with the SOKO team, but also global customers, who can **place orders and direct their payments** via the platform. As a result, SOKO can offer a variety of affordable and fashionable jewellery that is ethically and sustainably hand-made in Kenya, meanwhile creating income and jobs for local economies and communities.

HOLY SHIT SHOPPING

HOLY SHIT SHOPPING runs a **curated and limited online store** with design products, which are always small series and often unique pieces, from a pool of over 600 young designers **that reinvents itself every few weeks**.

7. SYNTHESIS AND RECOMMENDATIONS

Given the fact that there is demand in the EU for products by eco-inclusive enterprises that still face barriers in accessing international markets, supporting SMEs from the Global South in their export endeavours is one way to make the international trading system less discriminatory and more equitable, as postulated by the SDGs. Supporting eco-inclusive enterprises in market diversification endeavours can be beneficial, as long as value creation remains primarily at the source of origin. Therefore, bearing in mind opportunities and barriers that SMEs face, the question *whether* to support eco-inclusive enterprises from developing and emerging economies in their export endeavours should be answered with a: yes. *How* this support could look like should take into account the impacts of COVID-19 and an ongoing transformation of businesses towards digital solutions.

The following section outlines recommendations on how to support eco-inclusive enterprises from the Global South in accessing new markets with a focus on enterprise business support. Indeed, enterprise support programmes could:

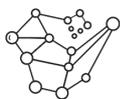
1. provide tools and peer learning that increase eco-inclusive enterprises' capacity to export,
2. support eco-inclusive enterprises in their search for business partners in new markets, and / or
3. offer an online marketplace for eco-inclusive enterprises to sell their products.

Provide tools and peer learning that increase eco-inclusive enterprises' capacities to export



In order to capacitate eco-inclusive SMEs to access new markets, enterprise support programmes could include specific tools that support eco-inclusive enterprises in diversifying their market reach. These tools could be integrated into existing business toolkits and trainings.

Topics covered could include how to conduct market research in foreign markets, how to choose export markets, how to determine documentation required for export, how to find and approach partners in new markets, how to choose suitable distribution channels and expand value chains, or how to find and adopt suitable mandatory or voluntary product or enterprise certification. In addition, such tools could include advice on target group specific understanding, branding, and storytelling, communication and presentation of products, or communication of triple bottom line impacts to an intercultural audience. Finally, tools related to setting up e-commerce could help an enterprise choose suitable platforms, or determine pricing strategies and target group specific advertising in the digital space.



In addition, enterprise support programmes could support the set-up of a peer learning network that connects eco-inclusive enterprises with an interest in market diversification and exporting with likeminded enterprises to discuss success stories as well as failures. These peer learning sessions could be moderated and facilitated by team members of the enterprise support programme, meanwhile promoting a strong network dedicated to knowledge exchange on market access for SMEs from the Global South.



In addition to tools that can be used as part of training of trainers and trainings for enterprises, enterprise support programmes could provide knowledge products, such as fact sheets or case studies with good practice examples on accessing new markets, such as exporting to the EU market. These knowledge products should focus on the context and needs of eco-inclusive enterprises specifically.

Support eco-inclusive enterprises in their search for business partners in new markets

Enterprise support programmes could train SMEs on partnership building with potential business partners and ecosystem actors in foreign markets, and support them directly in setting up these links. Options include setting up a virtual trade fair that showcases products of eco-inclusive SMEs, supporting selected enterprises to take part in product-specific trade fairs in new markets like the EU or providing a booth at a trade fair, collaborating with matchmaking platforms, or organising (virtual) business delegation trips to selected markets.



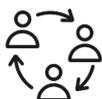
For the purpose of reaching new clients for individual products with export potential, a selection of enterprises could be invited to present their products as part of a virtual trade fair, as practiced by the “Beyond Beautiful” project of the WFTO. Ecosystem actors as well as pre-identified potential business partners could be invited by the enterprise support programme explicitly to take part in the virtual trade fair, at which potential partners can read about the stories of the enterprise and its product plus get in touch. Additionally, first contacts could be facilitated by the project team members as part of a follow-up.



Once movement control restrictions that were put in place as a response to the COVID-19 pandemic are lifted, enterprise support programmes could collaborate with selected trade fairs in Europe, and sponsor either a booth at which selected enterprises showcase their products, or sponsor a trade fair visit by individual enterprises. Interest on the side of trade fair organisers exists, as evidenced by interviews as well as previous collaborations between UNHCR’s MADE51 project with Ambiente trade fair in Frankfurt am Main as well as Maison et Objet in Paris. However, to be part of a booth, eco-inclusive enterprises would need to be able to accept orders or be willing to build up production capacities in case of requests.



As new partnerships are often built following personal encounters and stimulating conversations, (virtual) business delegations for eco-inclusive enterprises from the Global South to the EU or other international markets and vice versa could be organised by enterprise support programmes. Considering current movement control restrictions caused by COVID-19, but also carbon footprints from traveling, such delegation trips could be implemented digitally. These (virtual) business delegation trips contribute to understanding target market regulations by establishing contacts and informative sessions with relevant authorities, and personal meetings with suitable import and other business partners.



Another option would be to collaborate with existing online matchmaking platforms like FAIRLING, Faire.com, or leverist.de, that aim to connect providers of specific products with wholesalers, retailers, and concept stores. While leverist.de was established with a focus on international cooperation specifically, FAIRLING works with applications and a payment system, while focusing on actors within the European market only, which might entail some entry barriers for eco-inclusive enterprises from the Global South. Otherwise, it might also be an option to set up a similar platform focused on eco-inclusive SMEs as part of an enterprise support project.

Offer an online marketplace for eco-inclusive enterprises to sell their products



Another possibility would be for enterprise support programmes to provide an online marketplace for eco-inclusive products. For example, UNHCR’s MADE51 project, which supports market access for refugee artisans, opened such a webstore in collaboration with an importer based in the United Kingdom for a selection of products. Operating a project webstore thus seems to be possible, but rather with few selected products. Setting up a webstore does have its difficulties and there remain some open questions regarding import procedures, technicalities, management of orders, payments, and logistics that would need to be considered in advance. Considering transport modalities, it might be an option to limit the duration and geographic coverage of available products.

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ANNEX

Methodology and limitations

Product selection

To obtain a list of products offered by SEED-supported eco-inclusive enterprises with export potential, we compiled a list of all enterprises from the SEED network that either received an award or were categorised as runners up, and compared it against several exclusion criteria. Specifically, we excluded products such as food and beverages (e.g. juices and nutrients), local services (e.g. ecotourism and childcare), local solutions (e.g. energy, agriculture, building and construction), and apps – as these solutions are either tailored to the local context or come with highly complex export requirements. In addition, we excluded products that cannot be categorised as products for end consumers, but rather serve business to business or business to government sales. This resulted in a list of approximately 50 enterprises offering green and inclusive products for end consumers, including artisan and handicraft products, upcycled and recycled material products, sustainable fabrics and alternative materials, cosmetics (e.g. oil, soap, balm), luxury foods (e.g. coffee, honey), and furniture and light manufacturing.

Research method

This report was further enriched with information gathered through desk research as well as semi-structured interviews. Semi-structured interviews are understood as a qualitative data collection strategy, as part of which we asked selected experts open-ended questions, but also left room for the interviewees to share some more details and insights on individual experiences. During the course of 2020, 19 interviewees in total from the supply side, which included eco-inclusive enterprises from the SEED network, as well as from the demand side, which included stakeholders and potential business partners from the target market in the EU, were selected, contacted, and spoken to. Whereas the primary aim of the interviews with SEED-supported enterprises was to find out more about their export journeys, as well as opportunities seized and barriers faced, the ultimate goal of the interviews with stakeholders active in the EU market was to find out more about trends in the target market as well as its structures, including potential target customers, as well as sales and distribution channels.

Limitations and future research

This research is not without shortcomings. First, as this research is mainly centred around SEED-supported enterprises, we do not claim to make conclusions that are applicable to any SME from any geographical region in the Global South. However, our findings may still be useful for other eco-inclusive enterprises that see themselves operating in a similar setting. Second, as the research focus is on products that can be offered to end consumers in export markets, this report does not touch upon business to business or business to government sales. Likewise, it exceeds the scope of this study to analyse every international market in detail. As the EU constitutes a big international market and the largest single market area globally, it may still serve as a proxy and as a good starting point to look at when analysing exports by SMEs from developing and emerging economies to international markets in the Global North. Subsequently, due to its research focus, this report does not cover regional trade collaboration and South-South trade. Finally, as this report is based on qualitative research, we do not aim to make generic statements based on large samples, but provide insights and good practice examples based on information generated through desk research and interviews with selected experts.

Hence, future research would benefit from closer looks into a) product selections that cover business to business and business to government goods, and b) further target markets in the Global North, regional trade, and South-South trade.

Questionnaires

Questions for semi-structured interviews (demand side)

1. Do you work with small and medium-sized enterprises (SMEs) from developing and emerging markets?

If yes:

2. How does this cooperation look like?

3. What products of such enterprises do you distribute or sell to the European market?

4. Please rank the following product categories of products for end consumers offered by eco-inclusive enterprises according to their relevance to the European market:

- Artisan and handicraft
- Upcycled and recycled material products
- Sustainable fabrics and alternative materials
- Cosmetics (e.g. oil, soap, balm)
- Luxury foods (e.g. coffee, honey)
- Furniture and light manufacturing

5. Of the products you can see in the catalogue presented, what are the five products most relevant to European markets? Would you sell any of these or know somebody who would?

6. What characteristics and attributes would describe the potential target customer well?

7. What opportunities and barriers do SMEs face when expanding their activities to the European market? How can the opportunities be seized and barriers be circumvented?

8. Do you know of any further interview partners or potential partners?

Questions for semi-structured interviews (supply side)

1. Do you export products for end consumers to the European market?

If yes:

2. Since when (i.e. enterprise development stage) do you export your products to the European market?

3. What are your country-specific and product-specific target markets?

4. What are the opportunities you seize and the barriers you face?

5. Who are your most important partners in this export process and how do you build such partnerships?

6. What support would you need to improve your expansion to the European market?

If no:

7. Do you aim to export your products to the European market?

8. What barriers do you face in regard to exporting your products to the European market?

9. What would be needed / what support would you need to start exporting to the European market?

General:

10. 10. How could SEED support your expansion to the European market (e.g. topics, tools, etc.)?

List of interviewees

Type of organisation	Organisation	Name
Association	Weltladen-Dachverband e.V.	Dominik Gabel
Association	World Fair Trade Organisation	Jette Ladiges
E-commerce	Avocado Store	Mimi Sewalski
Eco-inclusive enterprise	Gorilla Conservation Coffee	Lawrence Zikusoka
Eco-inclusive enterprise	Last Forest	Mathew John
Eco-inclusive enterprise	Kibébé	Floris Magambi
Eco-inclusive enterprise	Kyaffe	Nalugemwa Elizabeth
Eco-inclusive enterprise	Mycotech	Adi Reza Nugroho
Eco-inclusive enterprise	Nature's Nectar	Katherine Milling
Eco-inclusive enterprise	Stonesoup	Smita Kulkarni, Malini Parmar, Bhavna Bhargava
Fair-trade shop	Weltladen Langen	n.a.
Fair-trade shop	Weltladen Leipzig	n.a.
Fair-trade shop	Weltladen Stuttgart	n.a.
Importer	Contigo	Ingo Herbst
Importer	GLOBO	n.a.
Importer	El Puente	Anna-Maria Ritgen
Trade fair	WeFair	Wolfgang Pfoser-Almer
Wholesaler	Bio Bio	Mark Verlohr
Independent expert	Independent fair trade expert	n.a.

Actor landscape in the European Union

STAKEHOLDER MAPPING

Importers and / or sellers



WeltPartner eG
 GLOBO Fair Trade Partner GmbH
 El Puente GmbH
 CONTIGO Fairtrade GmbH
 EZA Fairer Handel GmbH
 Commerce Equitable France
 Folkdays
 Manuyoo
 Avocado Store
 White Label Project

Trade fairs and matching platforms



Bazaar Berlin
 Ambiente
 Fairgoods
 Fair Handeln
 Maison et Objet
 WeFair
 Faire.com
 FAIRLING
 leverist.de

World Fair Trade Organisation (WFTO)
 European Fairtrade Association
 British Association of Fair Trade Shops and Suppliers
 Weltladen Dachverband e.V.
 Forum Eine Welt e.V.
 VENRO
 INKOTA Netzwerk e.V.
 Fair-Band
 FAIR-NETZ



Private and other initiatives

World Trade Organisation (WTO)
 International Trade Centre (ITC)
 European Export Helpdesk
 Centre for the Promotion of Imports from Developing Countries (CBI)
 Import Promotion Desk Germany (IPD)
 Swiss Import Promotion Programme
 Make Trade Sweden
 Finnpartnership
 Engagement Global



Public and government initiatives

Please note that this is a non-exhaustive list of stakeholders in the field of fair and ethical trade and trade in sustainable goods that are active in the EU.



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