

TRADING FAIRWILD:



COLIN WINTER/NEALS YARD REMEDIES

Identifying challenges to establishing ethical trade relationships for sustainably sourced wild products, and opportunities to facilitate market links

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The FairWild Standard guides the sustainable and equitable trade of wild-harvested ingredients such as medicinal and aromatic plants (MAPs). It forms the basis of a third party audited certification scheme, in which companies from different parts of the value chain are participating. To reach market share objectives for the next five years and ensure the sustainability and resilience of the fair-trading system, the FairWild Foundation aims to support a substantial increase in the number of participating companies and the volume and diversity of certified ingredients in trade. This requires efforts both to recruit new members, and to encourage and facilitate developing trade relationships under FairWild.

This paper reviews lessons learned from the development of other certification systems (organic, fair trade), and considers their applicability in the context of the FairWild system. Furthermore, it presents the results of consultations with past, current and potential members of the certification scheme to explore barriers to trading and identify actions to be taken in support of expansion. The paper is based on the BA thesis research of the first author (Antosch, 2016), carried out in collaboration with TRAFFIC and the FairWild Foundation.

BACKGROUND

The FairWild Standard was developed in response to environmental and socio-economic concerns arising from the international trade of wild-harvested plants, fungi and lichen. It guides sustainable sourcing of wild species and introduces equitable business concepts for working with harvesters of wild products. The Standard is managed by the FairWild Foundation, a non-profit organization established in 2008 in Switzerland. The Foundation's objective is to transform resource management and business practices to be ecologically, socially and economically sustainable throughout the supply chain of wild-collected products.

The FairWild Standard version 1.0 (Meinhausen *et al.*, 2006) focused primarily on social and fair trade issues, implemented in combination with organic and/or ISSC-MAP standards. It has since been revised to fully integrate ecological aspects in version 2.0 (FairWild Foundation, 2010), providing a comprehensive sustainability framework. The first FairWild certified ingredients became commercially available in 2007, with finished products reaching consumers in 2009. Since this time, the volume and diversity of products on the market has continued to grow. This initial success has in large part been due to the engagement of committed pioneer companies who piloted

▲ Collection of myrrh *Commiphora confusa* resin for supply to Arbor Oils, Kenya, a company that implements principles of the FairWild Standard in arid regions of northern Kenya. The operation was FairWild certified between 2013 and 2016.

FairWild within their value chains. In line with Principle 11 of the Standard, “Promoting FairWild buyer commitment”, traders and manufacturing companies sourcing wild plant ingredients have taken a very active role in developing the scheme and supporting its implementation, such as financing auditing costs for collection operations, provision of technical support and training.

Activities of the FairWild Foundation and partner organizations have up to now primarily focused on developing and implementing the Standard and making the certification scheme operational, including recent efforts to accredit additional certification bodies. The supply of certified ingredients was initially not sufficient in volume or stability to allow a wider promotion in the market, and hence the Foundation’s aim was a gradual growth in participation and market share. This has been encouraged through promotion at trade fairs, and inclusion of FairWild in conservation and development projects on sustainable sourcing. In addition to the formal certification scheme participants, which are listed on the FairWild website, a considerably larger group of companies has been engaged in implementation—over 100 in total, including currently registered companies and applications in process. Certified operators (wild ingredient producers) are spread across Europe, Central Asia, South Asia and East Africa, whereas traders and finished product manufacturers are mainly based in Western Europe and North America.

Although the scheme has grown since establishment, and long-term trends are positive, overall uptake of formal participation has been relatively slow and has fluctuated. One of the factors identified concerns trade links: on the supply side, newly certified wild collection operations may experience difficulties in securing sufficient stable trade relationships for their certified ingredients, and hence in covering annual certification costs. On the demand side, companies approaching FairWild are looking for particular certified ingredients that some operators could potentially supply, if they knew there was interest and a market. Participation in a new scheme can involve risks; manufacturers may be hesitant to commit to switch their product labelling when there is only one certified supplier of a specific plant, as they consider the supply to be potentially unstable. Likewise, producers need assurance on volumes to be purchased that buyers may not initially be in a position to provide. Despite these difficulties, interest in FairWild remains strong, with more and more companies enquiring about how to become involved.

In recent years, the Foundation has been exploring opportunities to facilitate market links, as well as working to more clearly define the role of the Foundation and partners in this process. To increase both the number of participating companies and the volume and diversity of certified ingredients in trade, there is a need to evaluate interventions which can be applied to facilitate trade and support the match of supply and demand within the FairWild scheme. To create solid development plans, information is required on the challenges in establishing and maintaining trade relationships that are perceived by different (potential) actors in FairWild value chains. Furthermore, opportunities for actors to become active players in facilitating these market links need to be defined.

METHODS

The objective of the research was to obtain insight into issues of matching supply and demand for FairWild certified products, and to identify and prioritize actions for the FairWild system.

The project took place in three stages. First, a desk study of possible approaches to trade facilitation was conducted. Concepts applied by other comparable certification schemes were examined, particularly their early stages of development. The review included analysis of approaches taken by—or advised to—organizations from the organic and fair trade sectors, consulting reports on sustainable trade initiatives, their history and progress, as well as on successful business development. A conceptual framework was developed against which the FairWild system could be compared.

Second, an analysis of the problems and needs for improvement at meso (i.e. system) or micro (i.e. individual valuechain) level perceived by different actors was undertaken. A series of semi-structured interviews was conducted during April–June 2016 with actors of the value chain. Individuals from seven different categories were approached (Table 1). In total, eight interviews were conducted with past, current and potential certification scheme participants (Groups 1–6), and five with chain supporters (Group 7), i.e. “agencies and...organizations representing the collective interest of the...community and providing support services” (Springer-Heinze, 2007). The last group includes the FairWild Board, Secretariat and partner organizations such as TRAFFIC, a non-governmental organization working on wildlife trade issues, and *ProFound-Advisers in Development*, a consulting organization.

The interviews aimed to identify the problems perceived by different actors in (potential) FairWild value chains as leading to a mismatch in supply and demand. Furthermore, the aim was to find out what concrete ideas and requests for interventions are suggested by interview partners. The latter included evaluation of interventions already considered by the FairWild Foundation, these being drawn primarily from an internal report (Brinckmann *et al.*, 2014). The information obtained was analyzed according to how many interview participants mentioned a dimension and by relating the different categories and their cross relations.

The final phase involved presentation and discussion of these preliminary results in a consultation meeting with the FairWild Board of Trustees in June 2016. This article is a summary of the main findings, with additional discussion by the authors.

	Description	No. of participants
Group 1	Certified collection operations	1
Group 2	Registered traders/ processors	2
Group 3	Registered licensees	1
Group 4	Potentially certified collection operations (including previously certified)	1
Group 5	Potential traders and processors	1
Group 6	Potential licensees	2
Group 7	Chain supporters	5

Table 1. Categories of interviewees and number of participants per group.

RESULTS

Learning from other voluntary sustainability standards

Since voluntary sustainability standards (VSS) and certification schemes were introduced towards the end of the 20th century, a valuable body of experience has accumulated with regards to their implementation. Problems experienced in matching supply and demand of certified produce have been apparent since the beginning in most VSS markets. Experts acknowledge that in general “too many projects have been set up where it was not at all clear that there would be demand for the products” and as a result “in many international trade commodities demand never seems to match supply” (van Elzakker and Eyhorn, 2010). However, several approaches can be taken to increase the likelihood of success.

Before a sustainable trade scheme is ready to reach for a higher market share, the literature indicates that certain preconditions should be met.

- **Ensure information on production capacity is available.** Experience from the organic sector stresses the importance of complete and up-to-date information (participants/production/volume) to be realistic “when and what quantity of products will be available” (Van Elzakker and Eyhorn, 2010). Detailed information should be available at supplier level (for enquiring buyers), but it is also important for the sustainability scheme to have an overview.
- **Adapt organizational structures and activities to suit delivery at scale.** As the fair trade movement has developed, organizations from the sector have established regional networks and auditing capacity to reduce cost and strengthen local capacity (Redfern and Snedker, 2002). Asen *et al.* (2012) stress that the effect of activities to support trade links will be greater if all chain actors are involved in their design and implementation.
- **Ensure producer security.** As a scheme develops, it can be anticipated that producers may have problems selling all their certified products at premium prices, due to the potential mismatch of supply and demand. Lessons from the organic sector show that producers may need to be prepared to adapt to changes in demand and price and build a buffer by diversifying selling channels and products, as well as having a “fall back” such as conventional (non-certified) markets (van Elzakker and Eyhorn, 2010). However, mechanisms should also be prepared for rapidly scaling up in response to increasing demand (van Elzakker and Eyhorn, 2010).
- **Ensure chain transparency to facilitate communication.** Good communication is vital to maintain relationships between value chain actors, e.g. between producer groups and their clients or potential clients (van Elzakker and Eyhorn, 2010). A high degree of transparency and traceability of the value chain will help to improve linkages.

In driving a scheme expansion, Molenaar *et al.* (2013) reflect that the “key driver for producer uptake is market demand, while key drivers for buyers are reputation management, brand value and security of supply”. Overall, the imbalance of demand and supply is one of the main potential barriers to success and must be carefully managed. Different strategies may help to achieve a better match of supply and demand, and to increase market demand overall.

- **Encourage industries in key markets to set targets.** The advisors of the International Finance Corporation (IFC) point out that it will be easier to increase demand in existing markets (especially Europe and the USA) and suggest encouraging companies and national industries in northern key markets to set “sustainable import targets” (Molenaar *et al.*, 2013). To promote demand in harder-to-reach “new” or southern markets, they suggest the involvement of multi-national companies, generating local awareness and involvement in local standards.
- **Increase consumer demand with clear messaging and strategic product choice.** Although initial successes in working with producer organizations led to a wide offer of products certified by the Fairtrade Labelling Organisation (FLO, now renamed Fairtrade International), at first there was not enough consumer demand. Approaches which led to the current level of success were the development of a product range with a focus on commodities characterized by a high consumer demand (e.g. coffee, cocoa, banana) combined with big media campaigns on issues which addressed public concern, such as child labour and slavery (Redfern and Snedker, 2002). A wider product range was then introduced at a later stage. The authors also note that working with mainstream businesses—rather than developing alternative parallel supply chains—helped to achieve more Fairtrade products in the shops and higher overall sales.
- **Ensure support service provision for producers.** The experience from the fair trade movement highlighted a “lack of effective export marketing service providers in developing countries” (Redfern and Snedker, 2002). To fill this gap, many European organizations offered business development services to producers in the form of training, consultancy and sharing of market information. However, these services could not be sustained financially over time. This led to experiments with “NGO sister organizations” to provide inputs through donor supported activities, a measure which was effective but, again, too expensive to sustain. Efforts next focused on developing local capacity, leading to the establishment of different national organizations, of which some were successful and others failed. Redfern and Snedker (2002) also describe how several business development service providers in producer countries developed their own trading company as a “bridge between producers and markets”.
- **Enhance the role of intermediaries to reduce friction.** As described by Asen *et al.* (2012), business matchmaking and information sharing are among the key tasks of intermediaries, who may, among others, be “business people along the value chain, investment advisors, NGOs, donor agencies, international organizations”. Intermediaries can play a critical role, helping to match investors and projects, as well as producers and markets. They should help in building management capacity and providing information, mediating between buyers and sellers by providing trust to both.
- **Support new producer entry.** Ultimately, to increase supply in line with demand it will be important to promote uptake among new producers. Mechanisms to support producer entry may include a better adaptation of standards to different sourcing contexts, lower entry requirements linked to systems of continuous improvement, and recognition between different standards to lower the cost of certification.

Problems in matching supply and demand for FairWild certified ingredients: interview outcomes

Many of the factors above were revealed to be important in the FairWild context. Interview participants described various issues leading to a potential mismatch in supply and demand, which would need to be overcome as part of the efforts to support a successful scaling up of the scheme.

An overarching concern identified is that too few consumers are aware of the presence of wild-collected ingredients in the products they use. Even manufacturers may not realize that they are sourcing from the wild. Hence there is little awareness about wild collected plants and related sustainability issues, and few companies/consumers know about the FairWild Standard. Demand for FairWild-certified ingredients is therefore limited, and needs to be further built.

A significant obstacle for finished product companies to enter certified supply chains is the perceived instability of supply. Companies would only enter the FairWild scheme if more suppliers were available in the system (to spread risk). They may require multiple sources of an ingredient to be available before committing to a change of product labelling.

A lack of transparency was also noted as an issue potentially preventing the expansion of sales from current certified suppliers. In some cases, the FairWild certificate is held by a trading company (certificate mandator) paying certification costs and providing oversight to implementation. The name of the certified operator is then not publicly listed and hence not available to other buyers.

Lack of market demand was identified as the main factor limiting producer uptake overall. Operators do not yet certify all the species and quantities they could potentially supply. Other challenges mentioned were inspection and certification costs, and difficulties in complying with the Standard and meeting quality requirements of their buyers.

Interviewees also highlighted that since the FairWild Standard was developed, the sustainability standards landscape has evolved, becoming increasingly competitive. Other certification schemes have now started to apply their own standards to wild-harvested plants, focusing to a greater or lesser extent on each of the different sustainability issues: ethical trading rules or organic/environmentally sustainable sourcing systems. Some interview partners believed that these certification systems are in comparison not only characterized by more demand (having pre-existing buyers), but may be easier and cheaper for a producer to implement. The latter would particularly be the case for schemes not requiring an annual onsite audit, or being less comprehensive in issue coverage than FairWild.

Facilitating trade: suggested interventions for the FairWild system

A number of strategies have been proposed to improve the match of supply and demand for FairWild certified ingredients and support market development—through the research interviews, and from FairWild’s own internal analysis.

First, activities could focus on increasing the demand. Together with some of its partner organizations (such as TRAFFIC, WWF), the FairWild Foundation could organize campaigns to highlight threats related to wild sourcing and to promote the FairWild Standard as a successful tool to assure sustainable sourcing of wild plant material used in cosmetics, herbal medicine and food. To this end, interviewees stressed the need to distinguish

clearly between industry- and consumer-focused communications, and to target campaigns accordingly. Interviewees had mixed opinions on the value of adopting a communications approach focused on particular species and/or products (beyond some broader sectoral priorities already established in Brinckmann *et al.*, 2014). They highlighted the diversity of different species that FairWild aims to cover as its greater mission. However, there was support for associating FairWild with “flagship” species, of conservation concern and/or high market value and consumer interest (e.g. liquorice, baobab or frankincense).

Companies from the buying industry would like to know more of what is or could potentially be available in the FairWild scheme. In the cross-cutting activity areas of information sharing and enabling communication between chain actors, the FairWild Foundation and/or partners may take an active role in matchmaking and providing more information on supply potentially available in the FairWild system, e.g. through additional news services tailored to the industry. However, some of the information on scarce resources may be considered commercially sensitive.

Publishing profiles of all suppliers and creating a searchable online database of certified ingredients would help to increase transparency and information availability. Producer profiles could contain more information of relevance to the industry such as yield expectations, harvesting calendars and quality specifications. Interviewees proposed considering a rule change on naming of sources, to increase transparency at producer level.

Interview participants also appreciated the idea of developing an online platform where companies can express their interest in offering or buying certified ingredients. This platform, and other tools and industry events aiming to support match-making, should also be made available for producers that had previously participated in the scheme and would be interested to re-enter.

In terms of the proliferation of other standards covering wild-harvested ingredients, interview participants stressed the need to investigate harmonized approaches for implementing FairWild together with other standards, and to pursue recognition strategies with other schemes. These are approaches already being taken by the FairWild Foundation, with several other systems now formally recognizing FairWild as fully or partially meeting their requirements for product labelling (e.g. Fair for Life, FTUSA). Attention is being paid to synergizing requirements and document systems with e.g. organic standards, in collaboration with certifiers and partners.

The Foundation has prioritized improvements to the certification system to reduce complexity and cost of participation—including establishing a new accreditation system and auditor training programme to expand coverage. The interviews highlighted that certified collection operations may also need increased incentives to avoid them exiting the scheme, and to ensure they can be economically sustainable in the face of fluctuating demand. In this regard, a stronger focus could be placed on producer security and increasing their capacity with regard to business planning, enabling them to plan prices that cover the real cost of production, and negotiate long-term commitments.



DAVID BRAZIER /
B'AYOBA, ZIMBABWE



ANASTASIYA TIMOSHINA / TRAFFIC



HILARY SOMERLATTE / ARBOR OILS

Left to right: collecting baobab *Adansonia digitata* seeds for supply to B'Ayoba, Zimbabwe, a FairWild-certified operator; liquorice *Glycyrrhiza* sp. confectionery on sale, Borough Market, London, UK; collecting myrrh *Commiphora* sp. resin, Isiolo District, Kenya.

To implement the proposed interventions, strong partnerships and alignment with other organizations focused on market access were seen as key to success, particularly for value chain development and match-making. This would allow the Foundation itself to focus on more neutral and cross-cutting activities such as facilitating information exchange. However, the Foundation should work to sensitize all actors to the FairWild model: emphasizing the need to ensure that buyer commitment is secured from the start, and the operator is committed to a continuous improvement approach.

The requirement for additional work to achieve the preconditions necessary for a scale-up was also highlighted. Internal organizational capacities and systems need to be reconfigured, to maximize efficiency when operating with a larger number of certification scheme participants. To gain a more comprehensive overview on production capacities of operators and the volumes currently sold with the certificate (versus potential supply), additional data would need to be collected and assessed.

DISCUSSION AND CONCLUSIONS

The challenges identified with the FairWild system reflect the issues in trade relationships encountered in other certification schemes; notably that demand remains behind supply (Molenaar *et al.*, 2013).

In considering interventions, it is useful to reflect on specific issues of importance in the FairWild context: the MAPs trade sector is complex and the trade is not very transparent. This is particularly the case for conventional (non-certified) ingredients. Sustainability concepts are taken up slowly in the sector and few stakeholders are aware of the threat unsustainable collection practises pose on the resources they use.

More awareness among both companies and consumers is needed to increase market demand. However, the FairWild Standard started to reach markets when other labelling initiatives such as organic and fair trade already had a strong position. As most brand companies with a focus on their sustainability profile already apply organic and/or fair trade certification systems and often use a mix of cultivated and wild-sourced ingredients, they may have difficulties to fit FairWild in their business model and marketing concepts. The unique benefits of FairWild must be clearly articulated to increase the brand value for companies that are interested to communicate about their

use of wild products. Meanwhile, continuing to pursue strategic recognitions with other labels will be needed for sectors and products where there is less potential for consumer recognition of the label. In addition, the more intrinsic benefits of a FairWild-certified supply chain can be promoted—providing comprehensive assurance on sustainability issues, guaranteeing traceability from the point of collection, and providing evidence to help meet the increasingly stringent regulatory requirements in major markets.

The complexity of the sector and diversity of species harvested also complicates research into production and trade volumes. Investing further efforts into data collection and analysis of actual versus potential certified supply would help to understand better the dimension of any current and future mismatch in supply and demand, as well as to know (and potentially help communicate to buyers) what is available in the system. Reconsidering and updating systems of data collection and information sharing will be part of preparing for an upscale in the FairWild system.

The research highlighted the need for a review of transparency to the public on sources and producers. However, the issue is not straightforward to address, as such decisions are agreed between supply chain actors, and may be considered beneficial to both parties. In most cases, the first buyer covers certification costs because the producer cannot afford to do so, and furthermore commits to purchase 100% of the FairWild certified ingredients harvested as well as provide technical support. In considering feasibility of a rule change, the extent to which this is truly limiting expansion of trade in certified ingredients (e.g. if the first buyer does not purchase all available ingredients as FairWild) should be considered, alongside other factors such as producer empowerment and transparency to consumers.

In the creation of greater market demand, ultimately, two strategies are possible. One approach would see FairWild prioritize consumer awareness, working with other organizations to make the public aware of wild species in trade, the associated problems and promoting the FairWild Standard as a solution. The other would see FairWild take a more business-focused approach, working with the industries involved to make them aware of the threatened resource they are using and encouraging them to set sustainable sourcing targets.

To establish FairWild as a globally relevant framework for wild-harvesting and value-adding trade, a business-focused approach would seem central. Not all species

(and finished products using wild ingredients) have the same potential to resonate with consumers. Also, while increasing consumer awareness was seen by interviewees as highly desirable, it was considered less achievable, given existing resources and the complexity of the wild ingredients sector. Efforts may hence focus on developing a more stable supply of many different species, fitting the range of ingredients searched by product developers. In parallel, more companies of the sector need to be encouraged to make commitments on adopting FairWild as a tool to protect the resources they are using.

However, there is a clear desire—and a potential market niche—to harness the drive of consumers as advocates for sustainable wild collection; something of importance also to FairWild licensees (manufacturers) planning their own consumer awareness efforts. While FairWild's own communications may remain broad, the Foundation could partner with others on campaigns organized around selected species, where conservation concerns are more apparent—especially those that are very popular among consumers.

The FairWild Foundation is already actively working on a number of projects which will help the market to develop. Activities to “de-risk” the system with regards to the perceived instability of supply (e.g. developing a more comprehensive policy on labelling derogations, in case of ingredient non-availability), should encourage entry. Ideally, manufacturers will start to realize that the true “risks” come from *not* addressing issues of sustainability and traceability in their supply chains.

There is much that can be and is already being done to increase information provision and aid linkages. Improving operator profiles with additional information and designing a platform or communication system to help buyers and sellers find each other more effectively, is a high priority. The FairWild Foundation and the certified producers can also do more to provide information and images in support of companies upstream in the value chains, helping them to communicate to consumers about wild plants, the FairWild label and its core values.

Moving from a relatively small-scale system to a larger initiative requires adaptation. The FairWild Foundation has already prioritized the training and accreditation of more certification bodies, to expand auditing capacity worldwide. The research indicated that a similar development may be needed in terms of delivery of support services to producers. Much of the technical support is currently provided through industry partnerships; while this can be expected to continue, one could also envision a more specialized service provision developing, with FairWild Foundation and/or partners taking an enhanced role. While support systems for producers were not a major focus of this research, the review highlighted valuable lessons from other initiatives to bear in mind, i.e. maximizing local capacity and building on existing structures wherever possible. A tool in development by partner organization *ProFound-Advisers in Development* also holds promise with regards to producer support, and in lowering the cost of obtaining multiple certifications. The “CheckApp” will help wild collection operations put in place a management and documentation system for

the harvest and trade of wild ingredients, assisting them to fulfil the FairWild requirements in combination with other schemes that may be requested by their buyers (i.e. organic or other fair trade standards).

The FairWild system has already demonstrated its potential as a framework for wild product sustainability, and a further mobilization is now building to take it to a higher level of market share. However, the effect will be greater if all stakeholders are involved in the process—collectors, traders, processors, brand companies and consumers. Let's trade FairWild!

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