Part 2

Overview of existing analytical work on the impacts of private standards on trade

Introduction

This chapter presents an overview of existing analytical work related to private standards and trade, with a focus on fruit and vegetable exports from developing countries.

The abstracts provided in this chapter are not summaries, but they rather highlight the content that is most relevant to this topic. Only those case studies that relate to the fruit and vegetable export sector have been included. The overview focuses on private standards, therefore it is far from exhaustive regarding studies on specific import regulations. The publications on regulations included in this overview have relevance for the analysis of the impacts of private standards, for example because of an interesting methodological approach.

For the sake of convenience and in order to give an indication of what aspects have been covered by research, the studies have been sorted by subject headings. However, a paper may address several subjects. In this case the paper has been classified under the subject that is most prominently addressed (to the personal judgement of the author of this overview). Only in rare cases has a paper been mentioned twice.

The overview is far from exhaustive. Many more studies exist, especially on the market aspects (notably on market volumes for labelled products, on consumer preferences and on consumer willingness-to-pay).

1. Extensive research programmes covering various aspects of private standards

Challenges and Opportunities Associated with International Agro-Food Standards (World Bank)

This World Bank research programme was launched in 2002 and the final report was published in 2005. The objective of the research programme is to improve the understanding of the development community regarding the challenges and opportunities for developing country trade associated with rising international food safety and agricultural health standards.

Contact: http://web.worldbank.org/WBSITE/EXTERNAL/TOPICS/TRADE/0,,contentMDK:20334931~menuPK:634021~pagePK:148956~piPK:216618~theSitePK:239071,00.html

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General Papers

1. Jaffee, S. and S. Henson. 2005. Food Safety and Agricultural Health Standards: Challenges and Opportunities for Developing Country Exports. Synthesis report.

Abstract: Strategies: exit, voice and compliance. Costs and benefits of (non) compliance. Distributional effects of standards. Implications for technical assistance.

2. Jaffee, S. and S Henson. 2004. Standards and Agro-Food Exports from Developing Countries: Rebalancing the Debate. World Bank Policy Research Working Paper 3348, June 2004.

Keywords: SPS standards; capacity-building; compliance costs; high-value agro-food trade.

Abstract: Rising standards serve to accentuate underlying supply chain strengths and weaknesses and thus impact differently on the competitive position of individual countries and distinct market participants. Some countries and/or industries are even using high quality and safety standards to successfully (re-)position themselves in competitive global markets.

3. Sewadeh, M. and V. Ferrer. 2004. Donor Support for SPS Capacity Building: taking stock and drawing lessons. Report prepared for the World Bank's International Trade Department. Washington D.C.

Abstract: Most support for capacity building in SPS issues is provided at times of (looming) trade disruptions, when options and acceptable time frame for change are reduced. Bilateral assistance is driven by self-interests for safe food imports. Most projects are sector specific and give no attention to other trade issues. There is little collaboration among agencies. Many projects target either the public or private sector. Partners in the private sector are often the "best" firms, which is cost-effective but re-enforces uneven distributional impact patterns. SPS management should become a mainstream element in strengthening competitiveness and technical assistance should aim at maximizing the strategic options of developing countries.

4. Henson, S., S. Jaffee, C. de Haan and K. van der Meer. 2002.

Sanitary and Phytosanitary Requirements and Developing Country Agro-Food Exports: Methodological Guidelines for Country and Product Assessments.

Keywords: SPS capacity; compliance strategies; country assessment; interview guide.

Abstract: A framework for assessing levels of sanitary and phytosanitary (SPS) management capacity in developing countries and implications for major agricultural and food exports. Considering the strategies adopted to comply with SPS measures in export markets and the associated costs of compliance. Including interview guides.

5. Wilson, J. S. and V. O. Abiola (eds.). 2003. Standards and Global trade: A Voice for Africa.

Keywords: Kenya, Mozambique, Nigeria, South Africa, Uganda.

Abstract: Identifies the specific capacity constraints, opportunities, and institutional reform needed for market-access in five African countries (all five case studies include the horticulture sector). Places trade facilitation measures and standards (both voluntary and mandatory technical standards) within a broader developmental context.

Contact: http://www1.worldbank.org/publications/pdfs/15473frontmat.pdf

Selected case studies producer countries

6. Aloui, O., and L. Kenny. 2004. Case Study on Cost of Compliance to SPS Standards for Moroccan Exports.

Abstract: Focus on tomato and citrus exports. The Moroccan national pesticide registration should be updated. At the farm level, compliance costs with the EurepGAP standard form 8 percent of the total farm gate costs. Small farms require a longer implementation time. For citrus growers, the requirement of mobile sanitation facilities will result in higher costs. At the packing house level, HACCP is fairly new but has already been integrated in several management strategies. Many managers have noted benefits from ISO 9001 implementation: better worker performance, greater efficiency, less rejects and easy tracing of the source of problems. The residue testing required by the British Retail Consortium (BRC) can not be done in the government

laboratory and samples must be sent to Europe. Differences among standards are the most serious problem.
7. Canale, F. 2004. The Phytosanitary Capacity of Developing Countries. (not online)

8. Henson, S. and S. Jaffee. 2004. Jamaica's Trade in Ethnic Foods and Other Niche Products: the Impact of Food Safety and Plant Health Standards.

Abstract: Core SPS management framework and human capital are available, but better coordination of SPS controls is needed. Investment has been reactive, and overall private investment in SPS control systems has been very limited. Other competitiveness problems limit economic benefits of enhanced trade-related SPS controls unless broader efforts to enhance export competitiveness are undertaken. Exporters can also choose to expand sales in value-added processed food products.

9. Jaffee, S. 2003. From Challenge to Opportunity: Transforming Kenya's Fresh Vegetable Trade in the Context of Emerging Food Safety and other Standards in Europe. World Bank, ARD Discussion Paper No. 2. Washington, D.C.

Abstract: The Kenyan fresh produce industry—with the assistance of the Government of Kenya and others—is effectively and proactively complying with rising standards and uses this as a competitive advantage. Remaining challenges are the documentation of safety of fresh produce sourced from smallholders, upgrading of small and medium enterprises and recognition by the European Union of the Kenya Plant Health Inspectorate Service as a "competent authority".

10. Jaffee, S. 2004. Delivering and Taking the Heat: Indian Spices and Evolving Product and Process Standards.

Abstract: Indian spice trade has earned a reputation for product quality and marketing service. Recent changes in regulatory and commercial requirements in some markets have triggered responses in production, post-harvest, and processing practices; in quality assurance and supply chain management systems; and in monitoring and testing products. Via effective private and public sector collaboration India also influences the "rules of the game" internationally. India is fully expected to meet remaining and emerging commercial and regulatory challenges.

11. Manarungsan, S., J. Naewbanij, and T. Rerngjakrabhet. 2004. Costs of Compliance to SPS Standards: Thailand Case Studies of Shrimp, Fresh Asparagus, and Frozen Green Soybeans.

Abstract (asparagus only): Over the last five years asparagus exports to Japan have grown strongly and exporters expanded into new markets. The tightening of residue limits in Japan pressured farmers to shift to organic farming or reduced chemical usage, increasing production costs by 165 percent and lowering yields by 20 percent. But they received a 29 percent price premium over conventional asparagus. For exporters, the cost of compliance is 100 percent higher than before (63 percent laboratory analysis, 37 percent quality systems). The government has invested in: laboratories; standards and guidance for Good Agricultural Practices; pesticide test kits; high-yielding and pest-resistant varieties; and technology to prepare and preserve natural pesticides.

12. Mbaye, A. A. 2004. Sanitary and Phytosanitary Requirements and Developing Country Agrifood Exports: An Assessment of the Senegalese Groundnut Sub-Sector.

Abstract (edible groundnuts only): Recently exports of edible groundnuts dropped by 90 percent as a result of the decline in output and yields in the entire groundnut sector. On the trade side, the main difficulty is meeting aflatoxin standards. A cost/benefit analysis of meeting this standard found a net benefit of 92 billion Franc-CFA

for edible groundnuts through higher prices and the possibility of selling greater quantities.

Selected Buyers Surveys

13. Lamb, J., J. Velez, and R. Barclay. 2004. The Challenge of Compliance with SPS and Other Standards Associated with the Export of Shrimp and Selected Fresh Produce Items to the United States Market.
Abstract: Overview of applicable standards and main SPS issues encountered, including the history of contaminations and entry refusals. The section on fresh produce focuses on raspberries, cantaloupe, asparagus, snow peas and mango. Analyses the strategies of suppliers from the buyers' perception and the cost of non-compliance (including refused shipments at the port etc.)

14. Willems, S., E. Roth and J. van Roekel. 2004. Changing European Public and Private Food Safety and Quality Requirements: Challenges for Developing Country Fresh Produce and Fish Exporters. European Union Buyers Survey. The World Bank, Rural Development Department. Washington, D.C.

Abstract: Transnational companies guarantee quality and safety under a private label in a vertically integrated chain. In collaborative chains, buyers support suppliers to implement standards. In transaction-oriented chains with intermediaries, suppliers are not regularly informed about standards and run the risk of non-compliance. The reasons for changing suppliers include: food safety; volume and reliability of supply; price; quality and packaging; social and ethical issues and political conditions.

Training

Training seminar for World Bank staff, January 27-28, 2004

15. Bureau, J-C. 2004. Raising the Bar on Product and Process Standards: Economic Principles. World Bank, Washington DC.

Articles in journals

16. Jaffee, S. and O. Masakure. 2005. Strategic use of private standards to enhance international competitiveness: Vegetable exports from Kenya and elsewhere. In. Food Policy Vol. 30, nr.3, pages 316-333. Elsevier.

Keywords: Private standards; Food safety; Brand reputation; Supply chain restructuring.

Abstract: Leading Kenyan fresh produce suppliers have re-positioned themselves at the high end segments of the market – those most demanding in terms of quality assurance and food safety systems. Factors having influenced this positioning include: relatively high freight costs and low labour costs, the emergence of more effective competition in mainstream product lines, and strong relationships with selected retail chains.

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Regoverning Markets (IIED)

Securing Small-scale Producer Participation in Restructured Agri-food Systems

The research project is implemented by the International Institute for Environment and Development (IIED) with collaboration from the International Farming Systems Research Methodology Network (RIMISP) and the Royal Tropical Institute (KIT).

The project analyses concentration in the processing and retail sectors of national and regional agrifood systems and its impacts on rural livelihoods. The role of primary producers and their economic organizations in negotiating market access and improving terms of trade in specific chains is examined.

Because this programme looks into domestic and regional markets rather than

international markets, only a few abstracts have been included in the overview. Contact: http:/www.regoverningmarkets.org

Papers

17. T.A. Reardon, J.A. Berdegué, M. Lundy, P. Schütz, F. Balsevich, R. Hernández, E. Pérez and P. Jano. 2004. Briefing Paper: Supermarkets and Rural Livelihoods: A Research Method (as tested in Central America).

18. B. Vorley. 2004. Briefing Paper: Global dynamics of grocery retail restructuring: questions of governance.

19. D. Boselie and P. van der Kop. 2004. Briefing Paper: Institutional and organisational change in agri-food systems in developing and transitional countries: identifying opportunities for smallholders.

20. P. Rondot, E. Biénabe and M. Collion. 2004. Briefing Paper: Rural economic organizations and market restructuring: What challenges, what opportunities for small holders?

21. Regoverning markets. 2004. Final report of Phase 1
Contact: http://www.regoverningmarkets.org/docs/phase1.pdf

Regional papers and selected country studies

- East Africa, Kenya and Uganda
- Southern Africa, South Africa and Zambia
- Latin America, Guatemala - tomatoes, Nicaragua – tomatoes, Nicaragua -Cooperativa de Prodión y Comercialización, Guatemala - Asociación de Usuarios de Miniriego de Palencia
- China
- South Asia, Bangladesh and Pakistan
- South-East Asia, Philippines, Thailand and Viet Nam
- Central and Eastern Europe

Most of these reports are drafts for discussion. Only country studies which include the horticultural sector are listed here.

Contacts: http://www.regoverningmarkets.org/resources.html

Articles in journals

22. Berdegué, J.A. F. Balsevich, L. Flores and T. Reardon. 2005. Central American supermarkets' private standards of quality and safety in procurement of fresh fruits and vegetables. In. Food Policy. Vol. 30, nr.3, pages 254-269. Elsevier.

Keywords: Fresh produce; Supermarkets; Standards; Safety; Central America.

Abstract: Leading supermarket chains in Central America are imposing private standards. At the same time they are cutting costs through organizational change. The implementation of these private standards is good for consumers but a challenge for producers. Field study in Costa Rica, Guatemala, El Salvador, Honduras and Nicaragua from 2002 to 2004.

2. On methodology

Methodologies for quantifying impact of technical barriers to trade

4. Henson et al. 2002. Sanitary and Phytosanitary Requirements and Developing Country Agro-Food Exports: Methodological Guidelines for Country and Product Assessments. (see above under World Bank project).

23. Maskus, K.E. and J.S. Wilson (eds.). 2001. Quantifying the Impact of Technical Barriers to trade: Can it be Done? University of Michigan Press, Ann Arbor.

Abstract: The emergence and enforcement of stronger standards among developed economies could result in diminished trade opportunities for developing countries. At the same time, standards could expand market access through resolving consumer information problems. Among the issues addressed in this collection are restrictions on genetically modified foods and pesticide use and compatibility standards for computers. The publication includes essays by prominent international trade specialists.

23a. Maskus, K. E., J. S. Wilson and T. Otsuki (2001). An Empirical Framework for Analyzing Technical Regulations and Trade.

24. Beghin, J.C. and J-C. Bureau. 2001. Measurement of Sanitary, Phytosanitary and Technical barriers to Trade. OECD, Paris.

Abstract: Assessment of various methodologies for measuring non-tariff trade barriers in the agricultural and food sectors: Analytical framework. The price-wedge method. Inventories-based approaches. Survey-based approaches. Gravity based approaches. Risk assessment-based cost-benefit measures. Stylised microeconomic approaches. Quantification using sectoral or multimarket models.

Contact: Wayne.Jones@oecd.org - http://www.oecd.org/dataoecd/1/36/1816774.pdf

25 (=38). Henson, S.J. 2001. Measuring the Economic Impact of Technical Measures on Trade in Agricultural Commodities. FAO (ESC), Rome.

Contact: http://siteresources.worldbank.org/INTRANETTRADE/Resources/Topics/Accession/Standards&TradeOverview_Eng.doc

26. Maskus, K. and J.S. Wilson. 2000. Quantifying the Impact of Technical Barriers to Trade: A Review of Past Attempts and the New Policy Context. World Bank, Washington DC.

27. Roberts, D., T. Josling, and D. Orden. 1999. A Framework for Analyzing Technical Trade Barriers in Agricultural Markets. Economic Research Services. United States Department of Agriculture, Washington, D.C.

Methodologies for value chain analysis

28. Barrientos, S., C. Dolan and A. Tallontire. 2003. A Gendered Value Chain Approach to Codes of Conduct in African Horticulture In. World Development Vol. 31, No. 9, pp. 1511–1526, 2003. Elsevier

Key words: Africa, gender, codes of conduct, employment, export horticulture.

Abstract: Combining global value chain and gendered economy approaches, this paper provides a framework, the "gender pyramid", for assessing the gender content of codes of conduct. It analyses labour codes currently applied in three industries

exporting to Europe: South African fruit, Kenyan flowers and Zambian vegetables and flowers. It concludes that the gender sensitivity of the codes of conduct needs to be greatly enhanced.

Contact: Available at http:/www.sciencedirect.com

29. Kaplinsky, R. and M. Morris. 2001. A handbook for value chain research. Prepared for IDRC.

Abstract: What is a value chain and why is it important? Methodology: the point of entry for value chain analysis; mapping value; product segments; how producers access final markets; benchmarking production efficiency. Governance and upgrading in value chains: distributional issues, rents and barriers to entry.

Contact: Global value chain initiative hosted by the Institute for Development Studies (IDS): http://www.ids.ac.uk/globalvaluechains/index.html http://www.ids.ac.uk/ids/global/pdfs/VchNov01.pdf

Authors: kaplinsky@ids.ac.uk, morrism@ukzn.ac.za

30. Raikes, P., M. F. Larsen and S. Ponte. 2000. Global Commodity Chain Analysis and the French Filière Approach: Comparison and Critique. In. Economy and Society 29(3), 2000.

Abstract: Reviews two approaches to the study of economic restructuring which focus on commodity specific dynamics of change approach and the francophone "filière" tradition.

Contact: Centre for Development Research, Copenhagen, Denmark.

3. On the impact of governmental regulations

On the impact of import regulations: SPS measures

31. Henson, S. and J. S. Wilson (eds.). 2005. The WTO and Technical Barriers to Trade. 560 pp Edward Elgar Publishing.

Keywords: Standards, technical barriers, WTO, trade.

Selected articles:

PART I Theoretical And Quantification Issues

31a. Fischer, R. and P. Serra (2000), Standards and Protection

31b. (=24) Beghin J.C. and J-C. Bureau (2001), Quantitative Policy Analysis of Sanitary, Phytosanitary and Technical Barriers to Trade (see Chapter 3)

PART II Standards And Trade In Goods

31c. C. Perroni and R. Wigle (1999), International Process Standards and North-South Trade

PART III Sanitary And Phytosanitary Measures

31d. Wilson J.S. and T. Otsuki (2003), Food Safety and Trade: Winners and Losers in a Non-Harmonized World

31e. Henson S. and R. Loader (2001), Barriers to Agricultural Exports from Developing Countries: The Role of Sanitary and Phytosanitary Requirements

PART IV Institutional Issues

31f. Casella, A. (2001), Product Standards and International Trade. Harmonization through Private Coalitions?

31g. Vogel, D. (2001), Is There a Race to the Bottom? The Impact of Globalization on National Regulatory Policies

Contact: www.e-elgar.com (Ordered by ESCP)

32. Teisl, M. F. and J. A. Caswell. 2003. Information Policy and Genetically Modified Food: Weighing the Benefits and Costs. Working Paper 2003-01, Department of Resource Economics, University of Massachusetts, Amherst.

Keywords: GMOs, biotechnology, labelling, benefits, costs

Abstract: This paper discusses the merits of various studies of the costs of GMO labelling schemes, with a particular emphasis on the impact of the design of the labelling programme on benefits and costs. Mandatory versus voluntary. Positive versus negative. Segmentation based on testing or traceability (identity preserved) systems.

http://www.umass.edu/resec/workingpapers/Teisl%20&%20Caswell%20Working%20Paper.pdf (or via http://www.umass.edu/resec/workingpapers/index.html)

33. Buzby, J. (ed.) 2003. International Trade and Food Safety: Economic Theory and Case Studies. United States Department of Agriculture. Agricultural Economic Report No. 828. Washington, D.C.

http://www.ers.usda.gov/publications/AER828/

Keywords: BSE, dioxin, economic theory, food safety, grains, international trade, meat, poultry, produce, regulation, regulatory trends, Salmonella, seafood, ERS, USDA. Selected chapters:

33a. Mitchell, L. Chapter 2. Economic Theory and Conceptual Relationships between Food Safety and International Trade

Abstract: The market generally does not provide socially desired levels of food safety. This gives reason for regulations, which impact on trade.

33b. Calvin, L. Chapter 5. Produce, Food Safety, and International Trade Response to U.S. Foodborne Illness Outbreaks Associated with Imported Produce.

34. Unnevehr, L. J. (ed.) 2003. Food Safety in Food Security and Food Trade. International Food Policy Research Institute, Washington, D.C.

http://www.ifpri.org/2020/focus/focus10.htm

Selected articles:

34a. Caswell. J.A. 2003 Trends in Food Safety Standards and Regulation: Implications for Developing Countries.

34b. Henson, S. Food Safety Issues in International Trade.

34c. Wilson, J.S. and T. Otsuki. 2003. Balancing Risk Reduction and Benefits from Trade in Setting Standards.

34d. Calvin, L., L. Flores, and W. Foster. 2003. Case Study: Guatemalan Raspberries and Cyclospora.

Abstract: Description of a public-private effort to solve a food-safety problem, where strict standards did not repair past reputation damage.

34e. Norton, G.W., G.E. Sanchez, D. Clarke-Harris and H. Koné Traoré. 2003. Case Study: Reducing Pesticide Residues on Horticultural Crops.

Abstract: three examples how to balance pesticide residue limits and phytosanitary requirements through IPM and pre-inspection protocols.

34f. Berdegué, J.A., F. Balsevich, L. Flores, D. Mainville and T. Reardon. 2003. Case Study: Supermarkets and Quality and Safety Standards for Produce in Latin America.

34g. Unnevehr, L.J., L. Haddad and C. Delgado. 2003. Food Safety Policy Issues for Developing Countries.

35. Josling, T., D. Roberts and D. Orden. 2003. Food Regulation and Trade: Toward a Safe and Open Global System. Institute for International Economics, Washington DC.

36. Wilson, J.S., T. Otsuki. 2002. To Spray or Not to Spray: Pesticides, Banana Exports, and Food Safety. Development Research Group (DECRG), World Bank.

Abstract: Gravity model results suggest that a 10 percent increase in regulatory stringency - tighter restrictions on the pesticide chlorpyrifos - leads to a decrease in banana imports by 14.8 percent. In addition, findings suggest that lack of consensus on international standards and divergent national regulations on pesticides is costly.

(Note: From a technical plant protection perspective a 15 percent import reduction is unlikely)

37. Otsuki, T., J.S. Wilson and M. Sewadeh. 2001. A Race to the Top? A Case Study of Food Safety Standards and African Exports. World Bank, Washington DC.

38 (=25). Henson, J. 2001. Measuring the economic impact of technical measures on trade in agricultural commodities, Working Paper, FAO (ESC), Rome.

39. Henson, S.J., R. Loader, A. Swinbank, M. Bredahl, and L. Lux. 2000. Impact of Sanitary and Phytosanitary Measures on Developing Countries. Department of Agricultural and Food Economics, University of Reading.

40. Otsuki, T., M. Sewadeh and J.S. Wilson. (2000) Saving Two in a Billion: A Case Study to Quantify the Trade Effect of European Food Safety Standards on African

Exports. World Bank, Washington DC.

Abstract: Uses the gravity equation method to determine the effects of European aflatoxin standards on African exports of dried fruits and nuts.

41. WTO. 2000. The Development Challenge in Trade: Sanitary and phytosanitary Standards. Submission by the World Bank. World Trade Organization, Geneva.

On the impact of import regulations: Organic and other standards

42. Garcia Martinez, M. and F. Bañados. 2004. Impact of EU organic product certification legislation on Chile Organic Exports. In. Food Policy, Vol. 29, No.1, pp.1-14

Keywords: Organic products; Chile; Certification legislation; Trade barriers; EU

Abstract: This paper presents the results of a study on the impact of EU organic certification legislation on Chilean organic exports. The lack of an equivalent system forces Chilean organic exports to enter the European Union through the "back door", that is, through special import permits, with the resulting increase in transaction costs as products accepted in one EU country may not be accepted in another. The paper reports also on the recent legislative developments to establish a national organic certification system in Chile and the problems encountered to make it operational.

Contact: marian.garcia@imperial.ac.uk

43. World Bank. 2001. Standards, Developing Countries and the Global Trading System. In. Global Economic Prospects and the Developing Countries 2001. World Bank, Washington DC

On the impacts of governmental regulations in export countries: labour rights

44. Kucera, D. and R. Sarna. 2004. How do trade union rights affect trade competitiveness? Working Paper No. 39. ILO

Abstract: The paper uses a bilateral trade gravity model to evaluate the effects of Freedom of Association and Collective Bargaining (FACB) rights and democracy on exports for the 1993 to 1999 period, including data for up to 162 countries. The paper finds robust relationships between stronger FACB rights and higher total manufacturing exports. However, the paper finds no robust relationship between FACB rights and labour-intensive manufacturing exports.

Contact:

http://www.ilo.org/public/english/bureau/integration/download/publicat/4_3_233_wp-39.pdf

45. Kucera, D. and R. Sarna. 2004. Child Labour, Education and Export Performance. Working Paper No. 52 ILO

Abstract: The paper uses a gravity trade model to estimate the effects of child labour and education on exports for the 1993 to 1999 period including data for up to 162 countries. This paper states that there is robust statistical evidence that child labour is bad and education is good for exports, including for unskilled labour-intensive manufacturing exports.

Contact: http://www.ilo.org/public/english/bureau/integration/download/publicat/4_3_302_wp-52.pdf

46. Chau, N.H. and R. Kanbur. 2000. The Race to the Bottom, From the Bottom

Abstract: South-South competition to export to the North, and its impact on labour conditions in developing countries. The paper argues that larger exporters will have better labour conditions for their workers than small exporters. (In the case that market requirements in the North do not include compliance with certain labour standards)

http://www.arts.cornell.edu/poverty/kanbur/ck15.pdf

4. On the impact of private and voluntary standards

47. Bazoche, P., E. Giraud-Héraud and L-G. Soler. 2005. Premium Private Labels, Supply Contracts, Market Segmentation, and Spot Prices, Journal of Agricultural & Food Industrial Organization: Vol. 3: No. 1, Article 7.

Abstract: European retailers have modified the market segmentation by implementing new private labels, imposing more demanding production requirements and relying on contractual relationships with upstream producers. This paper proposes a model of vertical relationships between producers and retailers in order to analyse the interest of producers to commit to these new private labels, their effects on spot market prices, and the resulting market segmentation between the spot market and supply contracts.

http://www.bepress.com/jafio/vol3/iss1/art7

48. Kilian, B., C. Jones, L. Pratt and A. Villalobos. 2005. The value chain for organic and fairtrade products and its implication on producers in Latin America. CIMS paper presented at the IAMA 15th Annual World Food & Agribusiness Symposium.

Abstract: Comparison of conventional, organic and fair-trade prices at FOB and retail levels for bananas and at farm gate, exporter, toaster and consumer level for coffee. Analysing the results with a standardized market model showed that price distortion along the value chain seriously affects the benefits distributed by sustainable production, favouring the retail and wholesale sectors instead of the production sector.

Contact: bernard.kilian@incae.edu, CIMS

http://www.ifama.org/conferences/2005Conference/Papers&Discussions/1042_Paper_Final.pdf

49. Basu, A., N. Chau and U. Grote. 2004. On export rivalry and the greening of agriculture: the role of eco-labels. Paper presented at the European Development Research Network (EUDN) second academic Conference on Trade, aid, FDI and international migration.

Keywords: Eco-labelling in Agriculture, Export Rivalry, Strategic Complementarity.

Abstract: (Note: the authors use the term "eco-labelling" to mean organic farming and other environmental certification programmes). The presented theoretical framework yields a set of empirical implications in a subgame perfect Nash equilibrium, and highlights: (i) the selection criteria of countries that adopt ecolabelling, and (ii) the endogeneity of labelling incentives and the welfare consequences of observed labelling initiatives. The theoretical findings are tested by investigating the time pattern of ecolabelling adoption by countries. Food industry export orientation appears to be correlated with the speed with which countries implement their own ecolabelling programmes.

Contact: http://www.eudnet.net/Member/afd_2004/Basu_Chau_and_Grote.pdf or

http://www.eldis.org

50. Duprez, C. and J.M. Baland. 2004. Made in Dignity: The Effects of Labelling on Child Labour. European Development Research Network (EUDN)

Abstract: This paper analyses the impact of both social and geographical labelling on child labour. A simple model of North-South trade is developed, which shows that social labelling will not have any effects in several cases.

Contact: http://www.eudnet.net/Member/afd_2004/Duprez_and_Baland.pdf or http://www.eldis.org

51. Morrison, J., K. Cushing, Z. Day, and J. Speir. 2000. Managing a Better Environment: Opportunities and Obstacles for ISO 14001 in Public Policy and Commerce. Pacific Institute report. Oakland, California.

Keywords: ISO 14001, trade, environment

Abstract: Analysis of the creation of the standards, and their implications, benefits and limitations. The authors argue for changes in the ISO membership. Three case studies describe the emergence of ISO 14001 as an environmental regulatory tool in the United States. The authors make recommendations on how the ISO 14000 standards might be integrated into commercial practices, regulatory structures, and trade regimes in a socially equitable and environmentally beneficial manner.

Contact: http://www.pacinst.org/topics/globalization_and_environment/public_policy/isoes.pdf

52. UNCTAD. 1997. Expert Meeting on Trade and Investment Impacts of Environmental Management Standards, particularly the ISO 14000 series, on Developing Countries. Geneva, 29-31 October 1997.

52a. UNCTAD. 1997. Environmental management standards, Particularly the ISO 14000 series: Trade and investment impacts on developing countries

Background Report prepared by the UNCTAD secretariat for the meeting.

52b. UNCTAD. 1997. Report of the meeting TD/B/COM.1/10, TD/B/COM.1/EM.4/3

http://www.unctad.org/en/docs/c1em4d3.en.pdf

52c. UNCTAD. 1997. Recommendations adopted by the expert meeting.

TD/B/COM.1/EM.4/L.1

Contact: rene.vossenaar@unctad.org

http://www.unctad.org/Templates/Meeting.asp?m=4220&intItemID=1942&lang=1

5. Case studies

Case studies on market entry barriers/reasons for adoption

53. Hattam, C. (PhD in progress) Small Farmer Organic Agriculture: Perceptions and Impacts of Certification.

Keywords: Organic agriculture, small farmer, adoption

Methodology: Household survey of organic and conventional producers of avocado in Mexico. Technology adoption theory, market entry work, the theory of planned behaviour for attitude variables.

Contact: c.e.hattam@reading.ac.uk

54. Fouayzi, H., J.A. Caswell and N.H. Hooker. Forthcoming. Motivations of Fresh-Cut Produce Firms to Implement Quality Management Systems. In. Review of Agricultural Economics.

55. O'Brien, T.M. and A. Díaz Rodríguez. 2004. Mejorando la competitividad y el acceso a los mercados de exportaciones agrícolas por medio del desarrollo y aplicación de normas de inocuidad y calidad. El ejemplo del espárrago Peruano. Reporte del Programa de Sanidad Agropecuaria e Inocuidad de Alimentos del Instituto Interamericano de Cooperación para la Agricultura (IICA)

Keywords: supply chain partnerships, quality standards, adoption, success case

Contact: http://infoagro.net/shared/docs/a3/esparrago_peru.pdf

56 (=8). Henson, S. and S. Jaffee. 2004. Jamaica's Trade in Ethnic Foods and Other Niche Products: The Impact of Food Safety and Plant Health Standards.

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Centre for Environmental Investigation and Planning (CIPMA)

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Contact: IISD/ICTSD Trade Knowledge Network

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Keywords: Rules of origin; cost of compliance; preferential trading agreements
Abstract: In the case of NAFTA, average compliance costs with rules of origin are found to be around 6 percent in ad-valorem equivalent, undoing the tariff preference (4 percent on average) for a large number of tariff lines.
Contact: Jose.anson@unil.ch; Olivier.Cadot@unil.ch; antonie@iadb.org;
demelo@ecopo.unige.ch; akiko.suwa@ens.fr; Bolormaa.TumurchudurKlok@unil.ch

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Contact: Seth_Gogoe@sgs.com.

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64a. Organic agriculture in El Salvador: the case of fresh vegetable in Las Pilas
Abstract: Technical assistance helped small farmers to convert a maize-vegetable system into a year-round organic vegetable production system for supermarkets in the capital. This led to higher labour demand and higher prices.
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Abstract: A farmer association was brought in contact with a buyer of organic cocoa. The buyer provided seed capital. This enabled the association to rehabilitate abandoned cocoa fields into mixed certified organic systems with bananas, fruits, tubers and shade trees.

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Abstract: Two marketing firms contracted small-scale producer associations for which they managed organic certification. Compared with conventional small producers, organic producers faced on average 8 percent higher production costs but the price premium resulted in a 52 percent rise in the net revenue. However, the farmers had difficulties meeting increased quality demands and sometimes had to sell to the domestic market.

Contact: odamiani@usa.net

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Contact: Mehmet Arda, mehmet.arda@unctad.org http://r0.unctad.org/infocomm/Diversification/

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On retailer power in the food chain

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Abstract: Develops a model of price transmission where both oligopoly and oligopsony power co-exist. It shows that taking the degree of price transmission in a perfectly competitive market as a benchmark, oligopoly and oligopsony power do not necessarily lead to imperfect price transmission, although they can.

Note: May be relevant to analyse distribution of certification costs through price transmission along the chain.

Contact: lexhab@nottingham.ac.uk PDF copy on file

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Keywords: buyer-driven chains; small producers; voluntary and regulatory standards

Contact: tom.fox@iied.org and bill.vorley@iied.org

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Keywords: Buyer/supplier relationships, trust, fairness, justice, UK supermarkets

Abstract: An empirical study of suppliers' perceptions of their trading relationships with the UK supermarkets. Conceptual framework based on Kumar's (1996) theory of justice. The results provide evidence of good practice in some supermarket relationships but show considerable room for improvement in others. Most significantly, the results suggest that a retail strategy based on low prices does not necessarily imply an abuse of market power or unfair treatment of suppliers.

Contact: a.fearne@imperial.ac.uk

http://www.racetothetop.org/documents/reports/Fearne_et_al_EAAE-Paris.pdf

See also briefing note: Methodology for quantitative comparison of UK multiple retailers' terms of trade with primary producers http://www.imperial.ac.uk/agriculturalsciences/cfcr/pdfdoc/brief3.doc

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Race to the Top developed a benchmark for supermarkets with scoring methodology (indicators) on: environment, nature, consumer health, producers, workers (both within the company and in the supply chain) and local sourcing. Six UK chains participated in the pilot scoring, but only 3 in the second year, after which the project had to stop and tracking of progress was not possible.

Contact: http://www.racetothetop.org/documents/RTTT_final_report_full.pdf

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Abstract: In the United Kingdom, large supermarkets have captured most of the market for fresh vegetables. They specify cost, quality, delivery, product variety, innovation, and food safety and quality systems. The paper analyses how they have structured the horticulture export industries in Kenya and Zimbabwe.

Contact: http://www.ids.ac.uk/ids/bookshop/wp/wp96.pdf

80. Dolan, C., J. Humphrey. 2000 Changing Governance Patterns in the Trade in Fresh Vegetables between Africa and the United Kingdom

Abstract: Large UK retailers have adopted competitive strategies based on quality, year-round supply and product differentiation. Global value chain analysis is used to explain why supply chains have become much more vertically integrated. While the current trends may lead to a changing role for importers, the tendency towards the concentration of production and processing in Africa in the hands of a few large firms is likely to continue.

Contact: http://www.gapresearch.org/production/IFAMSubmission.pdf

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Available at www.competition-commission.org.uk/reports/446super.htm. (See especially Chapter 11 and Appendix 11.3.)

On governance of food chains, including standards and certification

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Keywords: global value chains, convention theory, governance, coordination, quality, standards, Africa

Abstract: Convention theory helps to understand governance in global value chains through analysis of "quality". "Lead" firms "drive" chains through relatively loose forms of coordination. They have been able to embed quality information into widely accepted standards, certifications, and codification procedures.

Contact: spo@diis.dk Danish Institute for International Studies

http://www.ids.ac.uk/globalvaluechains/publications/ponte-conventions.pdf

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Abstract: Challenges to reduce rural poverty in developing countries through increasing export of agricultural products arise in the areas of competition and from the increasing importance of standards in trade. Using a global value chain perspective, this study examines the implications of these challenges for policies (technical assistance, local institutional capabilities, producer organizations, etc.) and for the institutional framework that regulates agricultural production and trade, including standards-setting, intellectual property rights and global competition policy, as well as trade capacity building and trade promotion initiatives.

Contact: http://www2.gtz.de/dokumente/bib/05-0280.pdf

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Keywords: Food safety; Standards; Certification

Abstract: Third Party Certification reflects the growing power of supermarkets to

regulate the global agrifood system. At the same time, it also offers opportunities to create alternative practices that are more socially and environmentally sustainable.

Contact: hatanaka@msu.edu, lbusch@msu.edu.

Corrected proof available at http://www.sciencedirect.com/

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Keywords: Feedback; Food system; Management; Agriculture; Ecosystem; Society

Abstract: Discusses the importance of tightening feedback loops between ecosystems, actors in the food production chain and consumers. Where distances between resource and resource user are too large, feedback has to be directed through institutions on an overarching level, e.g., policy measures or environmental and social labelling of products.

Contact: asasun@infra.kth.se (Å. Sundkvist). Tel.: +46 8 79086 26.

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Presented at the International Livestock Congress—2005 in Houston. Copyright: International Stockmen's Educational Foundation.

Contact: G.C. Smith, Center for Red Meat Safety, Colorado State University, Fort Collins, CO 80523-1171. L. Saunders, IMI Global, Inc., P.O. Box 1291, Platte City, MO 64079

www.livestockcongress.com

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Work plan 2005-2006:

- Private standards and trade: consultants' report reviewing the use of private standards in sourcing agro-food products from developing countries, with a focus on Latin America

- Interplay between private standards and government regulation: stakeholder workshop followed by economic analysis of the various options for governance of the food sector.

88a. OECD. 2004. Private Standards And The Shaping Of The Agro-Food System. OECD Working Party on Agricultural Policies and Markets. AGR/CA/APM (2004)24

Keywords: private standards, food chain governance, policy issues

Abstract: Based on interviews with food retailers, standards' owners and manufacturers. Minimum quality standards set by government prompt higher quality firms to increase quality even further to remain competitive, but price premiums are reduced. However, food safety is seen by retailers as a non-competitive issue. Some private standards pre-empt regulation and often are later incorporated into regulation. According to interviewed GFSI members, they already require 100 percent certification from developing country suppliers.

Contact person: Linda Fulponi (E-mail: linda.fulponi@oecd.org)

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Keywords: Global value chains; governance; networks; transaction costs; value chain modularity

Abstract: Theoretical framework that uses transaction costs economics, production networks, and technological capability and firm-level learning. Three important factors: (1) the complexity of transactions, (2) the ability to codify transactions, and (3) the capabilities in the supply-base. Five types of global value chain governance – hierarchy, captive, relational, modular, and market. Four case studies: apparel, bicycles,

horticulture and electronics.
Contact: http://www.soc.duke.edu/~ggere/web/Governance_GVCs_RIPE_Feb%202005.pdf

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http://www.farmfoundation.org/documents/Jean-MarieCodron-final3-13-03_000.pdf

On labelling

On economics of labelling (economics of information)
91. Grolleau, G. and J. A. Caswell. 2005. Interaction Between Food Attributes in Markets: The Case of Environmental Labeling. University of Massachusetts Amherst, Department of Resource Economics, Working Paper No. 2005-5
Keywords: Environmental labelling, food attributes, food marketing, quality perception
Abstract: Results suggest that the market success of eco-friendly food products requires a mix of environmental and other verifiable attributes that together signal credibility.
Contact: g.grolleau@enesad.inra.fr tel. (33)380-772443,
caswell@resecon.umass.edu tel. (1)413-545-5735
http://www.umass.edu/resec/workingpapers

92. Grolleau, G. and J. A. Caswell. 2003. Giving Credence to Environmental Labeling of Agro-Food Products: Using Search and Experience Attributes as an Imperfect Indicator of Credibility. In. Ecolabels and the Greening of the Food Market, ed. W. Lockheretz, pp. 121-129. Boston, MA: Tufts School of Nutrition Science and Policy.
http://nutrition.tufts.edu/pdf/conferences/ecolabels/proceedings.pdf

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Keywords: Asymmetric information, credence goods, consumers' beliefs, label.
Contact: olivier.bonroy@univ-pau.fr marc.laclau@univ-pau.fr

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Abstract: Multicriteria analysis of costs (including enforcement costs and distributional effects along the chain), benefits, risks and uncertainties associated with a number of options for GM labelling. Options evaluated: status quo, voluntary GM-free, mandatory GM (derived from/derived with help from).
Contact: Edward.bramley.harker@nera.com, john.dodgson@nera.com,
michael.spackman@nera.com; http://www.foodsafetynetwork.ca/gmo/fsagmlbl.pdf;

96. Caswell, J. A. 2000. Analyzing Quality and Quality Assurance (Including Labeling) for GMOs. AgBioForum. Published by Illinois Missouri Biotechnology Alliance 3 (4/Winter).
Key words: GMOs; quality assurance; labelling.
Contact: http://www.agbioforum.org/v3n4/v3n4a08-caswell.htm
(413)545-5735, caswell@resecon.umass.edu
http://www.umass.edu/resec/faculty/caswell/#Economics%20of%20Food%20Labeling

On markets for labelled products

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Yearly publication.

Contact: Hard copies can be ordered online or the full document can be downloaded at: www.ifoam.org or www.fibl.org/english/shop/

98. Centro de Inteligencia de Mercados Sostenibles (CIMS)

CIMS publishes regular market studies for organic and other certified products which are of interest to Latin America. These studies are for sale, but some can be downloaded for free when registered (registration is for free). All documents are available in Spanish, some also in English. Recent studies:

98a. Perfil de mercado de piña sostenible 2005

98b. Análisis del mercado del aguacate convencional y orgánico en la Unión Europea

98c. Requisitos y regulaciones para la importación de frutas tropicales a los Estados Unidos: Capítulos específicos para: aguacate, banano, mango, papaya

98d. Análisis del mercado de papaya convencional y orgánica en la Unión Europea

Contact: http://www.CIMS-LA.com

99. Rozan, A., A. Stenger and M. Willinger. 2004. Willingness-to-pay for food safety: an experimental investigation of quality certification effects on bidding behaviour. In. European Review of Agricultural Economics. Vol. 31(4) Wageningen.

Contact: http://www.sls.wau.nl/aae/erae/erae_issues.htm

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Keywords: GM food, experimental auction

Abstract: The median level of compensation demanded by English and French consumers to consume a genetically modified food was more than twice that in any of the United States locations.

Contact: jlusk@purdue.edu http://www.agecon.purdue.edu/staff/jlusk/USEU%20AJAE.pdf

101. Umberger, W.J. and Feuz D.M. 2004. The Usefulness of Experimental Auctions in Determining Consumers' Willingness-to-Pay for Quality-Differentiated Products. In. Review of Agricultural Economics, Vol.26 nr.2 page 170.

Abstract: The validity and effectiveness of using experimental auctions to elicit consumers' willingness-to-pay for closely related, quality-differentiated products is examined. Demographic variables are poor predictors of bids and auction winners. Panel size and initial endowment influence auction results. Relative willingness-to-pay values elicited through experimental auctions appear valid, while actual willingness-to-pay values are influenced by experimental design.

Contact: http://www.blackwell-synergy.com/toc/raec/26/2

102. Consumers International. 2004. Green Food Claims. An international survey of self-declared green claims on selected food products. Consumers International's Office for Developed and Transitional Economies (ODTE).

Abstract: The paper explores whether European and US consumers can trust the information displayed on everyday food labels/packaging.

Contact: www.consumersinternational.org

103. Sligh, M. and C. Christman. 2003. Who Owns Organic? The Global Status, Prospects, and Challenges of a Changing Organic Market. RAFI-USA

Keywords: Organic market, US, concentration

Abstract: Includes an overview of the corporate structure of the bigger organic food companies and retailers and concentration trends.

Contact: http://www.rafiusa.org/pubs/OrganicReport.pdf,

Michael Sligh, msligh@rafiusa.org

104. UNCTAD. 2003. Organic Fruit and Vegetables from the Tropics. Market, Certification and Production Information for Producers and International Trading Companies.

Abstract: Organic production practices by crop. Brief market outlook and certification requirements.

105. Lohr, L. 2001. Factors Affecting International Demand and Trade in Organic Food Products. In. Changing Structure of Global Food Consumption and Trade. A. Regmi (ed.). ERS WRS No. 01-1, USDA Economic Research Service, Washington, DC, p. 67-79.

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On standard setting and the design og conformity assessment programmes

108. Courville, S. (forthcoming). Standards and Certification. In. Kristiansen, Paul and Acram Taji (eds.) Organic Agriculture: A Global Perspective. Collingwood: CSIRO Publishing.

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http://www.isealalliance.org/documents/pdf/COI_Feb05_PD1.pdf

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Keywords: environmental and social requirements, access, scheme typology

Abstract: Review of 95 existing case studies on impact and market access of environmental and social requirements. Analysis of the relation between typology of the certification scheme (mandatory/voluntary, stakeholder participation, transparency etc.) and the extent to which it acts as barrier to trade.

Background case studies:

110a. Amariei, L. 2004. Learning from Social and Environmental Schemes for the ECL Space: ETI and EurepGAP case studies.

110b. Quinoñes, B.R. 2004. Learning from Social and Environmental Schemes for the ECL Space: FLO case study.

110c. Raste, A. 2004. Learning from Social and Environmental Schemes for the ECL Space: IFOAM case study.

110d. Acuña, E. 2004. Learning from Social and Environmental Schemes for the ECL Space: ISO 14001 case study.

Contact: Pierre Hauselmann phauselm@piec.org

http://www.piec.org/ecl_space/07-CG_section/Knowledgebase/knowledgebase.pdf

http://www.piec.org/ecl_space/07-CG_section/casestudies.html

111. Michaud, J., E. Wynen and D. Bowen (eds.). 2004. Harmonization and Equivalence In Organic Agriculture - Volume 1. FAO, IFOAM and UNCTAD.

Selected contributions:

111a Courville, S. and D. Crucefix (2004). Existing and Potential Models and Mechanisms for Harmonization, Equivalency and Mutual Recognition.

112. Courville, S. 2004. Making Sense of Corporate Responsibility Tools. In. Galea, Chris (ed.) Teaching Business Sustainability –Volume 1. Sheffield: Greenleaf.

113. Smith, G. and D. Feldman. 2004. Implementation mechanisms for codes of conduct. Study prepared for the CSR Practice, Foreign Investment Advisory Service

Investment Climate Department, The World Bank/International Finance Corporation

Keywords: CSR; monitoring; apparel; footwear; agribusiness

Abstract: With the exception of a few leading initiatives, monitoring of the implementation of codes of conduct in the agribusiness sector is close to nonexistent. Unique to this sector is the use of large external NGOs as third-party verifiers. Common problems (all industries):

- A lack of convergence in codes and in the training of monitors
- The need for more multi-stakeholder initiatives
- Disagreements over how far down the supply chain companies should monitor
- Insufficient transparency and inadequate education of workers on their rights

Contact: http://www.ifc.org/ifcext/economics.nsf/AttachmentsByTitle/Implementation+mechanisms/$FILE/Implementation+mechanisms.pdf

114. Jahn, G., M. Schramm and A. Spiller. 2004. Trust in Certification procedures: An Institutional Economics Approach Investigating the Quality of Audits within Food Chains 2004. Paper presented at the IAMA World Food & Agribusiness Symposium 2004

Keywords: Certification, Audit Theory, Institutional Economics, Low Balling-Effect

Abstract: Only a reliable control procedure can reduce the risk of food scandals. This paper presents a model to enhance the efficiency of certification systems building on findings from financial auditing and the theory of the New Institutional Economics. Dumping prices on the certification market and differences in performance reveal the need for changes. Strategies are suggested to reduce auditors' dependence, intensify liability, increase reputation effects and minimise audit costs.

Contact: a.spiller@agr.uni-goettingen.de

http://www.ifama.org/conferences/2004Conference/Papers/Spiller1023.pdf

115. Jahn, G., M. Schramm and A. Spiller. 2004. Differentiation of Certification Standards: The trade-off between generality and effectiveness in certification systems. Paper presented at the IAMA World Food & Agribusiness Symposium 2004

Keywords: Certification, Information Economics, Crowding Effect, Harmonization

Abstract: A growing number of certification systems indicates the importance of third party audits but implies the danger of "audit tourism" and, as a consequence, rising transaction costs. The driving forces of this differentiation process are analysed. The trade-off between generality of a system and its effectiveness is revealed, which can be traced back to the disadvantages of general management system audits.

Contact: gjahn@gwdg.de

http://www.ifama.org/conferences/2004Conference/Papers/Jahn1024.pdf

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http://www.isealalliance.org/documents/pdf/R028_PD1.pdf

117. Barling, D. and T. Lang. 2003 Codex, the European Union and Developing Countries: an analysis of developments in international food standards setting. Department of Health Management and Food Policy Institute of Health Sciences, City University.
A report for the Programme of Advisory Support Services (PASS) for the Rural Livelihoods Department of the UK Department for International Development (DfID). PASS project code TR0033.
Keywords: Codex, food safety, barriers.
Contact: d.barling@city.ac.uk, t.lang@city.ac.uk

118. Courville, S. 2003. Social Accountability Audits: Challenging or Defending Democratic Governance? In. Law and Policy 25(3). Pp. 267-297.

119. Lohr, L. and B. Krissoff. 2001. Consumer Welfare Effects of Harmonizing International Standards for Trade in Organic Foods. In. Global Food Trade and Consumer Demand for Quality. B. Krissoff, M. Bohman and J.A. Caswell (eds.). Kluwer Press (= 94.)
Contact: llohr@agecon.uga.edu http://www.agecon.uga.edu/faculty/llohr/index.html

120. Barrientos, S., C. Dolan and A. Tallontire. 2001. Gender and Ethical Trade: A Mapping of the Issues in African Horticulture. Chatham, UK. NRI/NRET
Keywords: South Africa, Kenya, Zambia, export, gender, codes.
Contact: http://www.nri.org/NRET/genderet.pdf

On relations between private standards and (inter)governmental standards

On relations between private standards and governmental regulations

121. Codron, J-M., E. Giraud-Héraud and L-G. Soler. 2005. Minimum quality standards, premium private labels, and European meat and fresh produce retailing. In. Food Policy. Vol.30, nr.3, pages 270-283. Elsevier.
Keywords: Food quality; Standards; Labelling
Abstract: The nature and determinants of retailer strategies following the mad cow crisis compared with food safety strategies in the fresh produce sector. Analysis of how the levels and enforcement of governmental standards influence the strategies of retail chains. Conclusions regarding what variables governments should take into account when they define minimum quality standards.
Contact: codron@ensam.inra.fr, giraude@poly.polytechnique.fr, soler@ivry.inra.fr.
Corrected proof available at http://www.sciencedirect.com/

122. Mainville, D.Y., D. Zylbersztajn, E.M.M.Q. Farina and T. Reardon. 2005. Determinants of retailers' decisions to use public or private grades and standards: Evidence from the fresh produce market of São Paulo, Brazil. In. Food Policy, Vol.30, nr.3, pages 334-353.Elsevier.
Keywords: Retailers; Food; Grades and standards; Fresh produce; Brazil
Abstract: The importance of the product in the firm's activities or sales, market power, scale of operations and investment in brand capital and reputation are key firm-specific factors encouraging the use of private G&S regimes over public.

Contact: mainvill@vt.edu, reardon@msu.edu
Corrected proof available at http://www.sciencedirect.com/

123. Courville, S. (forthcoming). Understanding NGO-Based Social and Environmental Regulatory Systems: Why We Need New Models of Accountability. In: Dowdle, C. (ed.) Rethinking Public Accountability. Cambridge: Cambridge University Press.

124. Fetter, T.R. and J.A. Caswell. 2002. Variation in Organic Standards Prior to the National Organic Program. In. American Journal of Alternative Agriculture 17(2):55-74.

125. Mojduszka, E.M. and J.A. Caswell. 2000. A Test of Nutritional Quality Signaling in Food Markets Prior to Implementation of Mandatory Labelling. In. American Journal of Agricultural Economics 82(May):298-309.

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Contact: www.isealalliance.org nvallejo@piec.org jmorrison@pacinst.org phauselm@piec.org2004

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Abstract: Environmental requirements are becoming more frequent, stringent and complex. Governmental standards and regulations, which fall under the TBT Agreement, represent only a small part of environmental requirements. There is a need to (a) more effectively involve developing countries in standard setting; (b) improve access to information on environmental requirements; and (c) strengthen developing countries' response capacities by promoting proactive adjustment policies.
Contact: http://www.unctad.org/en/docs/tdxibpd1_en.pdf

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129. Rotherham. T. 2003. Labelling for Environmental Purposes: A review of the state of the debate in the World Trade Organization - Full Report
Contact: http://www.tradeknowledgenetwork.net/pdf/tkn_labelling.pdf

130. IATRC (2001). Agriculture in the WTO: The Role of Product Attributes in the Agricultural Negotiations. International Agricultural Trade Research Consortium, St Paul.

On policy options

131. Henson, S., and T. Reardon. 2005. Private agri-food standards: Implications for food policy and the agri-food system. In. Food Policy, Vol. 30, nr.3, pages 241-253. Elsevier.
Keywords: Private standards; Food safety; Food quality; Trade
Abstract: Introduction to the evolution and nature of private food safety and quality standards, highlighting the resultant impacts on the structure and modus operandi of supply chains. Introduction to a series of papers.
Contact: shenson@uoguelph.ca, reardon@msu.edu.
Corrected proof available at http://www.sciencedirect.com/

132. Giovanni, D. and S. Ponte. 2005. Standards as a new form of social contract? Sustainability initiatives in the coffee industry. In. Food Policy, Vol. 30, nr.3, pages 284-301. Elsevier.

Keywords: Grades and standards; Coffee

Abstract: In the past, markets were embedded in a normative framework generated by government and labour unions. Now, standard-setting processes operate as new forms of social contract. This case study addresses standards' effectiveness in creating new markets, addressing collective and private interests and delivering sustainability. What is the role of public policy?

Contact: dgiovanni@worldbank.org, spo@tele2adsl.dk (S. Ponte).

Corrected proof available at http://www.sciencedirect.com/

133. Garcia Martinez M. and N. Poole. 2004. The development of private fresh produce safety standards: Implications for developing Mediterranean exporting countries. In. Food Policy, Vol. 29, No. 3, pages 229-255

Keywords: Private standards; Food safety; Developing Mediterranean countries; Fresh produce

Abstract: Part of EU research project. This article examines the impact of increasing demands for food safety and quality by European food retailers. The fundamental structure and culture of supplier organizations required by European retail chains are major entry barriers for developing Mediterranean fresh produce exporting countries and for developing countries in general. To sustain international demand for their products they have to take structural, strategic and procedural initiatives.

Contact: marian.garcia@imperial.ac.uk, available online at http://www.sciencedirect.com

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135. UNCTAD. 2004. Trading opportunities for organic food products from developing countries. Strengthening research and policy-making capacity on trade and environment in developing countries.

Abstract: There are important potential benefits of organic agriculture in developing countries. For export development, however, complex import and certification / accreditation procedures need to be addressed. Subsidies for organic agriculture in developed countries impact competitiveness. Comprehensive policies at both national and international levels are required. For small developing countries and LDCs, assistance from donors, as well as sharing the costs of certification with developed country partners (e.g. projects, fair-trade), may be the preferred option. For developing countries with a relatively large organic potential, developing a national certification system may be a priority.

Contact: http://r0.unctad.org/trade_env/test1/publications/organic.pdf?docid=4502%2B%22ItemID=2068)

136. Wilson, J.S. and V.O. Abiola. 2003. Standards and Global Trade: A Voice for Africa. World Bank, Washington DC. (See Chapter 2 under World Bank)

137. Pick, D. 2003. Product Differentiation and Asymmetric Information in Agricultural and Food Markets: Defining the Role for Government: Discussion In. American Journal of Agricultural Economics Vol. 85 Issue 3 Page 742 August 2003

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Developing Countries. (see Case studies on market entry barriers, Chapter 6)

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139a. UNCTAD. 2001. Expert Meeting Report: TD/B/COM.1/41, TD/B/COM.1/EM.15/3.

Abstract: Summary of conclusions and recommendations: policy options for Governments, the international community and UNCTAD. http://www.unctad.org/en/docs/c1em15d3.en.pdf

139b. UNCTAD. 2001. Expert Meeting Background note by the Secretariat.

Abstract: World markets are increasingly competitive and demanding, with a multitude of standards to be met. New skills are required in both the public and the private sectors and this often requires international cooperation. Rapid demand growth for organic food is likely to create temporary supply shortages. Such short-term opportunities can, however, only be seized if certification requirements can be met. As long as developing country producers retain significant production cost advantages, they might be able to consolidate the market shares gained in the short term.

140. Caswell, J.A. 2000. Labeling Policy for GMOs: To Each His Own? In. AgBioForum Vol. 3 (1) 53-57.

Key words: GMOs; biotechnology; labelling policy; trade disputes.

http://www.agbioforum.org/v3n1/v3n1a08-caswell.htm

On technical assistance

141. Wiig, A, and I. Kolstad. 2005. Lowering barriers to agricultural exports through technical assistance. In. Food Policy 30 (2005) 185–204. Elsevier

Keywords: Food policy; Agriculture; Exports; Aid evaluation

Abstract: Under the SPS Agreement, developed countries are to provide technical assistance to developing countries, to help them meet SPS requirements. A survey reveals, however, that assistance is allocated in an ad hoc manner. Data is presented which highlights the major problems of developing countries in exporting to the European Union and the United States.

Contact: arne.wiig@cmi.no, ivar.kolstad@cmi.no

142. MSU, Institute of International Agriculture. EurepGAP Certification Study

Abstract: USAID-funded study under the RAISE/SPS IQC on the effects of third party certification on developing countries. The goal is to enhance USAID's capacity to assist smallholders, agribusinesses and government agencies to seed in meeting the challenges of private standards imposed by the supermarket sector.

Interviews being conducted August 2005

Contact: Dr Deepa Thiagarajan at thiagara@msu.edu Tel. (1) 517 432 8211

143. ITC and Commonwealth Secretariat. 2003/2004. Influencing and Meeting International Standards: Challenges for Developing Countries. Vol. 1, 2003: Background Information, Findings from Case Studies and Technical Assistance Needs. Vol. 2, 2004: Procedures Followed by Selected International Standard-Setting Organizations and Country Reports on TBT and SPS. International Trade Centre, Geneva

Abstract: Conclusions and recommendations for technical assistance based on case studies on standards and quality management conducted in Jamaica, Kenya, Malaysia, Mauritius, Namibia and Uganda.

Contact: http://www.intracen.org/eshop/f_e_Publications.asp?LN=EN

http://publications.thecommonwealth.org/publications/html/DynaLink/cat_id/44/pub_id/341/pub_details.asp

144. Rotherham, T. 2003. Implementing Environmental, Health and Safety (EH&S) Standards, and Technical Regulations: The Developing Country Experience

Keywords: Standards; Conformity assessment; Institutional infrastructure; WTO; harmonization; technical assistance

Contact: http://www.tradeknowledgenetwork.net/pdf/tkn_standards.pdf

145. Gibbon. P. 2003. Commodities, donors, value-chain analysis and upgrading.

Paper prepared for UNCTAD

Abstract: There is a need for national sector-wide organization and assistance. This implies in-country and international donor coordination. The recent emphasis on encouraging production for niche markets has been probably excessive. While support to large cooperatives and large outgrower schemes offer possibilities to be more socio-economically inclusive, it should be recognised that they embody dynamics of differentiation and therefore internal marginalization. More attention should be given to complementary international interventions. These could range from consumer market development and removal of subsidies in the North to unbundling global market oligopolies.

Contact: pgi@diis.dk

64. Damiani O. 2001-2002. Series of case studies for IFAD

In addition to a cost benefit analysis these case studies also analyse the existence of supporting institutions and the types of technical assistance that has been received by the concerned farmers. (See Case studies on cost benefit analysis)

Other literature

146. IAAS. 2003. Food Quality a Challenge for North And South. Proceedings of the IAAS World Congress 2003. 319 pages.

Part I: Food quality and agriculture

146a. Schnug, E. 2003. Organically grown crops in the South – challenges and implications. page 81. Part II: Food quality and food industry

146b. Gellynck, X., W. Verbeke and J. Viaene. 2003. Interactions in the food chain: towards integrated quality management. page 121

146c. Mathijs, E. 2003. Marketing food quality: the role of labels and short chains. page 157

Part III: Food quality and the consumer

Part IV: food quality and food policy

146d. Kabwit Nguz, A. 2003. Food safety and international trade: a challenge for developing countries. page 293

Contact: IAAS Belgium vzw info@iaas.be

Order address: Kasteelpark Arenberg 20, B-3001 Heverlee, Belgium

147. Commission on Human Rights. 2005. Report of the United Nations High Commissioner on Human Rights on the responsibilities of transnational corporations and related business enterprises with regard to human rights. CHR 61st session, Item 16 of the provisional agenda. E/CN.4/2005/91

Keywords: Business; human rights; responsibility; standards

Abstract: The report reviews existing initiatives and standards on corporate social responsibility from a human rights perspective, noting that there are gaps in understanding the nature and scope of the human rights responsibilities of business.

Contact: http://www.ohchr.org/english/bodies/chr/sessions/61/lisdocs.htm

http://daccessdds.un.org/doc/UNDOC/GEN/G05/110/27/PDF/G0511027.pdf?OpenElement

148. Fearne A, M. Garcia Martinez, N. Bourlakis, M. Brennan, M. Temple and L. de Motte 2004. Mapping of Potential Research Areas for Economics Analysis. Document prepared for the Food Standards Agency under the contract RRD10/D03/B. Imperial College London, 16 March 2004

Contact: a.fearne@imperial.ac.uk

http://www.food.gov.uk/science/research/researchinfo/supportingresearch/economics/economicresearch/d03projdetails/d03003/ (report not available on the web)

149. Fearne A, M. Garcia Martinez, N. Bourlakis, M. Brennan, J.A. Caswell, N. Hooker and S. Henson. 2004. Review of the Economics of Food Safety and Food Standards. Document prepared for the Food Standards Agency under the contract RRD10/D03/A. Imperial College London, 24 February 2004

Contact: a.fearne@imperial.ac.uk

http://www.food.gov.uk/science/research/researchinfo/supportingresearch/economics/economicresearch/d03projdetails/d03002/ (report not available on the web)

Annex 1 - Alphabetical list of referenced authors

The authors of the studies quoted in the overview above are listed below in alphabetical order. In the overview, the studies have been numbered. If the author was first author of a publication, the number of the publication appears in the second column. If the author was co-author of a publication, the number of the publication appears in the third column (other reference). (Note: an author may have published on other subjects that were not listed in the overview and thus do not appear in this table).

Author	First author reference	Other references
Abiola, V.O.		5 (=136)
Acuña, E.	110d	
Aloui, O.	6, 73d	
Amariei, L.	110a	
Anson, J.	62	
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Commonwealth Secretariat		143
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Courville, S.	108, 111a, 112, 118, 123	
Crucefix, D.		111a
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Author	First author reference	Other references
Morrison, J.	51	126
Morrow, B.W.		100
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MSU Institute of International Agriculture	142	
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Stenger, A.		99
Sturgeon, T.		89
Sullivan, G.H.		61
Sundkvist, A.	86	
Suwa-Eisenmann, A.		62
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Tallontire, A.		28, 120
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Temple, M.		148
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Tulip, A.		59
Tumurchudur, B.		62
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Part 3

Overview of operational initiatives related to private standards and trade

Introduction and notes for the reader

This chapter intends to give a concise overview of current and recent operational initiatives related to private standards and trade, with a focus on fruit and vegetable exports from developing countries. As there are numerous projects by bilateral donors and NGOs and it is not possible to know them all, this paper focuses on the activities of FAO and other international organizations. This overview is therefore not comprehensive.

1. FOOD AND AGRICULTURE ORGANIZATION OF THE UNITED NATIONS (FAO)

FAO has standard setting activities, notably through the Codex Alimentarius Committee, but also in the fisheries sector and through various other conventions. Under the WTO agreements, national governments have an obligation to take international conventions into account when developing national regulations. Setting standards at the international level is therefore a tool for preventing the creation of barriers to trade.

However, the private sector also demands compliance with standards. Such private sector standards may be developed by buyers, by industry associations or by NGOs. Whatever the source, suppliers of food products are faced with a growing number of standards with which they have to comply.

Recognizing this reality, several units in FAO have developed activities to address issues related to private standards and market opportunities. Summary information on each initiative is given below with contact details for more information.

Food Safety and Quality Service (ESNS)

Technical assistance provided by ESNS to member countries.

Objectives: increase food quality and safety

Standards: Codex

Commodity: all

Geographical focus: global

Funding source: Regular Programme, Prevention of Food Losses Trust Fund, Trust fund for enhanced cooperation in Codex, bilaterally funded projects.

Short description and output to date:

- Policy advice on the assessment and reorganization of national food control systems for more effectiveness;
- Capacity building of food safety services: legislation, inspection and certification, laboratory facilities, quality assurance; application of GAP, GHP, GMP, HACCP, etc. Over 100 field projects dealing with different aspects of food safety.
- Training materials; practical manuals; methodologies; etc.

The scope of ESNS activities does not specifically address private standards. However, the general improvement in food quality and safety contributes to meeting requirements of private standards, the more so because in the field of food safety private standards refer often to Codex standards and guidelines.

Some specific activities that are (in)directly related to private standards and market opportunities:

- International Portal for Food Safety, Animal and Plant Health: authorized official international and national information. Link: http://www.ipfsaph.org/En/default.jsp
- Food additives database.
- Link: http://apps3.fao.org/jecfa/additive_specs/foodad-q.jsp
- Publications on HACCP, mycotoxins prevention, traceability and other related topics. Link: http://www.fao.org/es/ESN/eims_search/publications.asp?lang=en
- Project Strengthening compliance of the SPS requirements for expanded exports of fresh and processed fruits and vegetables. Geographical focus: Thailand. Contact: Mary.Kenny@fao.org

- Project Enhancement of Coffee Quality through Prevention of Mould Formation. Funded by Common Fund for Commodities.
- Contact: Renata.Clarke@fao.org
- Sub-regional Programme to facilitate trade: Food standards and food safety management. SADC member countries.
- Global Inventory Reference Materials and Food Safety Training Programme to Improve the Safety and Quality of Fresh Fruit and Vegetables. Geographical focus: Initially Latin America, expanded to Asia and Africa. Fresh Fruit & Vegetables Quality & Safety database with public and private initiatives, standards, training materials, etc.
- Link: http://www.fao.org/es/esn/fv/ffvqs?m=catalogue&i=FFVQS&p=nav; Manual. Train-the-trainers workshops, national action plans, case studies on incentives and disincentives for producers to implement quality and safety assurance programmes: 1. Cape gooseberry in Colombia; 2. Small citrus producers in Uruguay; 3. Broccoli in Ecuador.
- Contact and links: Maya.Pineiro@fao.org,
- http://www.fao.org/es/ESN/food/food_fruits_en.stm.

Animal Production and Health Division/Basic Foodstuffs Service (AGA/ESCB)

Title: Joint initiative on livestock markets, standards and market exclusion

Objective: Minimise the economic and social cost of market exclusion caused by livestock sanitary and technical standards and standard setting processes

Standards: Food safety and animal health standards

Commodity: Livestock products

Geographical focus: global

Funding source: pro-poor livestock…, Regular Programme

Short description and outputs to date:

- AGA Expert Consultation: The dynamics of sanitary and technical requirements; assisting the poor to cope. Rome, June 2004
- ESCB Symposium: Meeting international standards affecting the livestock sector: The challenge for developing countries. Winnipeg, 17 June 2004. For the Intergovernmental Group on Meat and Dairy.
- Report: The value chain approach as a tool for assessing distributional impact of standards on livestock markets: guidelines for planning a programme and designing case studies. By J. Humprey and L. Napier, IDS. January 2005.

Contact:

AGA: Anni.McLeod@fao.org

http://intranet.fao.org/en/departments/es/en/64748/73729/77807/index.html

Agricultural Management, Marketing and Finance Service-1 (AGSF-1)

Title: Cross country study on capacity building and investment needed to comply with EurepGAP standards in the Fresh Fruit and Vegetable sector
Standard: EurepGAP
Commodity: Fresh Fruit and Vegetables
Geographic focus: South Africa, Kenya, Chile, Malaysia
Funding source: regular programme
Short description:
The study will describe the status of EurepGAP implementation in the country; organizational structures required to assist with farmer compliance; analysis of capacity building and investments needed by government, private sector and farmers to comply with and implement EurepGAP standards.
Contact: Pilar.Santacoloma@fao.org

Agricultural Management, Marketing and Finance Service-2 (AGSF-2)

Title: Appraisal of certification costs for farmers and farmers' organizations under alternative certification schemes
Objective: Appraise cost/benefit and managerial skills involved in organic production, marketing and certification by farmers and farmer's organizations
Standard: organic
Commodity: rice, fresh and processed fruits and vegetables
Geographic focus: India, Thailand, Czech Republic, Hungary and Brazil
Funding source: Regular Programme
Short description:
Case studies on successful stories of market linkages. Methodology: review of secondary information on context of production and marketing and interviews and focus group-discussion with relevant stakeholders.
Contact: Pilar.Santacoloma@fao.org

Environment and Natural Resources Service/Organic Priority Area for Inter-disciplinary Action (SDRN/Organic PAIA)

a. UNCTAD/FAO/IFOAM International Task Force on International Harmonization and Equivalence in Organic Agriculture
Objective: seek solutions to international trade challenges that have arisen as a result of the numerous public and private standards and regulations for organic products that now prevail worldwide.
Standard: organic
Commodity: all
Geographic focus: global
Short description
Review the existing organic agriculture standards, regulations and conformity assessment systems including inter alia their impact on international trade in organic agriculture products. Formulate proposals on

- Opportunities for harmonization;
- Mechanisms for the establishment of equivalence;
- Mechanisms for achieving mutual recognition among and between public and private systems;
- Measures to facilitate access to organic markets, in particular by developing countries and smallholders.

Projects

- Tunisia: Appui au Développement et à l'Organisation de l'Agriculture Biologique.
- Objective: Améliorer les revenus et la sécurité alimentaire dans les zones

rurales à travers la diversification de la production et la valeur ajoutée que porte l'agriculture biologique.

- Croatia: Diversified Value-added Production and Certification in Environment Friendly Farming Systems.
- Objective: To improve rural income and food security through diversified production and specialty marketing of high-value and high quality products with environment enhancing production methods.
- Turkey: Formulation of a project for the development of organic agriculture and alignment of related Turkish legislation.
- Brazil: Consolidation and expansion of organic production in the Northeast of Brazil.
- Objective 2 and 3: Improved access to local, regional and international markets and access to conformity assessment systems according to market requirements.

Contact: Nadia.Scialabba@fao.org
http://www.fao.org/organicag

Raw Materials, Tropical and Horticultural Products Service-1 (ESCR-1)

Title: Socially and environmentally responsible horticulture production and trade

Objective: Provide information on niche markets that are of potential interest to developing countries and promote collaboration between certification programmes.

Standards: organic, fair-trade, Rainforest Alliance, SA8000

Commodity: fruit and vegetables and some other tropical products

Geographical focus: global

Funds: Regular Programme, CTA, ITC, World Bank

Short description and outputs to date

- Recent Market studies:
- The market for non-traditional agricultural exports. ESC technical paper 3. 2004
- The Japanese Market for Environmentally and Socially Certified Agricultural Products from Central America. 2004. IFOAM-Japan, RUTA, FAO, WB
- Environmental and social standards, certification and labelling for cash crops, Commodities and trade technical paper 2. 2003 (Includes literature review of cost/benefit analysis of standard implementation).
- Brochure ¿Es la certificación algo para mí? A practical guide to help producers and exporters in Central America with decision making about certification. Will be adapted for West Africa, East Africa and Asia.
- Regional conferences:
- Conference on Supporting the Diversification of Exports in the Caribbean/ Latin American Region through the Development of Organic Horticulture Trinidad and Tobago, October 2001.
- Production and export of organic fruit and vegetables in Asia. Proceedings of the seminar held in Bangkok, Thailand, November 2003. ESC technical paper 6, 2004.
- Working Group on Environmentally and Socially Responsible Horticulture Production and Trade and Expert Meetings. The latest working group meeting and the Fourth Expert Meeting on Voluntary Standards and Certification for Responsible Agricultural Production and Trade were held in 2004.
- Economic and Financial Comparison of organic and Conventional Citrus-growing Systems. 2001
- Increasing incomes and food security of small farmers in West and Central Africa through exports of organic and fair-trade tropical products.
- Objective: Generation of incomes and employment from increased production

and exports of organic and fair-trade products supported by effective grassroots institutional networks. Standards: organic and fair-trade

Commodity: cocoa, pineapple, shea butter, mango Funds: German Government.

Short description: after 6 month formulation phase the project is about to start.[65]

Contact: Pascal.Liu@fao.org

Portal page: http://www.fao.org/es/esc/en/20953/20987/highlight_44152en.html

Raw Materials, Tropical and Horticultural Products Service-2 (ESCR-2)

Title: Private Standards in the US and EU fruit and vegetable markets; implications for developing countries

Objective: Help stakeholders to understand the degree of penetration of private standards and certification and provide policy makers with relevant information for related national policy decisions

Standards: Private sector standards

Commodity: fruits and vegetables

Funds: FNOP

Short description:

Phase 1: Overview of existing private sector standards and relations to national regulations and international agreements. Overview of ongoing initiatives by international agencies that address market opportunities and constraints that result from private standards.

Contact: Pascal.Liu@fao.org

Agricultural Sector in Economic Development Service (ESAE)

Title: Opportunities and constraints facing small farmers as a supply source for supermarkets

Objective: Identify, and where possible, quantify barriers for linking small-scale producers with the supermarket supply chain and other expanding markets. Facilitate dialogue to improve the governance of chains.

Standards: not about standards per se, but those identified as barriers.

Commodity: vegetables

Geographic focus: Honduras, El Salvador

Funds: FNOP

Short description:

Strategic assessment of: i. logistics, fulfilment, quality and safety requirements of supermarkets and other outlets; ii. Constraints faced and investments and technical improvements needed by small farmers; iii. alternative institutional and organizational arrangements and possible financing mechanisms to meet these requirements. Participatory value chain analysis workshops to facilitate dialogue between chain actors to identify bottlenecks in the chain and design action plans.

Contact: Madelon.Meijer@fao.org

[65] Consultant, World Bank

Agriculture Department/Priority Area for Inter-disciplinary Action (AGD/Prods PAIA)

Title: Good Agricultural Practices (GAP) activities

Objective: help developing countries cope with changing and globalizing food systems and the proliferation of GAP standards.

Commodity: all

Geographic focus: global

Funds: FNOP, Prods PAIA and regular programme

Short description:

1. GAP meta-database bubble site with a total of 853 records. Link: http://www.fao.org/wssd/SARD/sard_gap/sard-gap.htm
2. GAP workshops and e-conference:
   - » International expert consultation, Rome, 2003
   - » Regional FAO/IAEA GAP workshops for Asia (2003) and Africa (2004) on the application of GAP principles in the production of Fresh Fruits and Vegetables
   - » Electronic conference by FAO-RLAC in 2004
   - » Conference and meetings in 2004 on GAP for the livestock sector in South Africa (feed and dairy), Namibia (meat) and Tunisia (poultry).
1. Literature review of success cases where implementation of GAP and related standards helped producers improving their position in the market.
2. Projects for locally adapted GAP development in Brazil, Burkina Faso (cotton-cereal-livestock system) and Thailand (fruits and vegetables).

Contact: AnneSophie.Poisot@fao.org, http://www.fao.org/prods/GAP/gapindex_en.htm

2. COLLABORATION AMONG INTERNATIONAL AGENCIES

Standards and Trade Development Facility

The Standards and Trade Development Facility (STDF) was established in 2002 by the World Trade Organization (WTO), the World Bank, the World Health Organization (WHO), the World Organisation for Animal Health (OIE) and FAO.

Start up funding came from the World Bank and the WTO; the latter also serves as the executing institution. Donations have been received from France, The Netherlands, Denmark, United Kingdom and Canada.

The objective of the facility is to assist developing countries in enhancing their expertise and capacity to analyse and to implement international sanitary and phytosanitary (SPS) standards, improving their human, animal and plant health situation, and thus ability to gain and maintain market access.

The facility provides grant financing for private and public organizations in developing countries seeking to comply with international SPS standards. Partner organizations may also apply for financing for projects. Project preparation grants have been approved for: CARICOM countries, Benin, Cambodia, Cameroon, Djibouti, Guinea, Mozambique, Malawi, SAARC Secretariat and Yemen. Ongoing projects include, among others, a Model Programme for Developing Food Standards within a Risk Analysis Framework and Expansion of the International Portal on Food Safety, Animal and Plant Health, both executed by FAO.

The STDF acts also as a forum for information sharing on the regular activities of the five partners: sharing of calendars, training materials and data on technical assistance.

Contact: http://www.standardsfacility.org/

In FAO: Ezzedine Boutrif, ESNS, Ezzedine.Boutrif@fao.org

The Integrated Framework

The Integrated Framework Trust Fund was created in 2001 by the International Monetary Fund (IMF), the International Trade Centre (ITC), the United Nations Conference on Trade and Development (UNCTAD), the United Nations Development Programme (UNDP), the World Bank and the WTO.

The objective if the Integrated Framework is to provide trade capacity building to governments of Least Developed Countries (LDC) and integrating trade issues into overall national development strategies.

Window I of the Fund finances Diagnostic Trade Integration Studies (DTIS). Such a study identifies sectors of export potential and supply side constraints. A DTIS also identifies measures to be taken to apply international and regional trade agreements and analyses implications for growth and poverty reduction. Recommendations are grouped into an action matrix.

Window II of the Fund provides bridging funds for capacity-building activities that are part of the DTIS Action Matrix. Funding of the Action Plan comes primarily from bilateral donors.

The WTO SPS Committee made a review of standards related issues identified in the DTIS process: G/SPS/GEN/545 28 February 2005 http://docsonline.wto.org/

Of the 14 countries that completed the DTIS, the following standards issues in the fruits and vegetables sectors were identified and follow-up action recommended:

Burundi: project for the establishment of an ISO9000 quality management scheme approved for Window II funding.

Cambodia: suggest to examine potential benefits of an export quality identity scheme tied to quality management programmes, with an accredited certifying body.

Ethiopia: training programmes in the horticultural sector should be strengthened, with attention to SPS constraints. A Window II project is being established to enhance the capacity of the Ethiopian Quality and Standards Authority.

Guinea: the United Nations Industrial Development Organization (UNIDO) has been providing assistance to the national standards and metrology institute. The national service for quality control and standards has received training and equipment to verify conformity with Codex standards.

Lesotho: recommended to adopt relevant South African legislation

Malawi: recommended that producers of groundnuts and paprika establish codes of practice, quality and other standards to prevent aflatoxin contamination in order to be able to diversify exports.

Mozambique: need to update pest status report and need help in eradicating or isolating some pests and in meeting other SPS requirements.

Nepal: need enforcement of quality standards and SPS requirements at farm and processing stages if Nepal wants to increase agricultural exports.

Senegal: a monitoring system in the groundnut sector is required to ensure quality and prevent aflatoxin contamination.

Yemen: Yemen Standards, Metrology and Quality Control Organization has been established with assistance from UNDP and UNIDO in the late 1990s. Further assistance on standards through a Window II project is being provided by UNIDO and a Window II fruit and vegetable export promotion project is implemented by UNIDO and FAO.

Unfortunately the IF web site does not give any information on the above mentioned approved or ongoing Window II projects.

Contact: http://www.integratedframework.org/

3. WORLD BANK

Standards and Trade E-learning Course

This course was provided in April-May 2005 to 200 participants from 65 countries. It was targeted to policy makers, staff of standards bodies and research institutes and managers of companies in developing countries, staff of supporting agencies and NGOs.

The objective was to make participants more aware about the opportunities and risks, costs and benefits and development potential associated with the application of internationally recognized product and process standards

The course examined the political economy dynamics of standards-setting, application, and enforcement at international and national levels, with a particular emphasis on the position of developing countries. The course provided documentation plus online discussion. At the end, participants were required to prepare a Response Action Plan to a problem related to standards and trade in their country of employment.

Contact: Steven Jaffee, sjaffee@worldbank.org

http://web.worldbank.org/WBSITE/EXTERNAL/WBI/WBIPROGRAMS/TRADELP/0,,contentMDK:20289384~menuPK:461730~pagePK:64156158~piPK:64152884~theSitePK:461702,00.html

4. INTERNATIONAL TRADE CENTRE (ITC)

The ITC was established in 1964 and is jointly operated by the WTO and UNCTAD. The Centre provides information on export markets and marketing techniques and assists in establishing export promotion programmes and marketing services. The Centre's help is freely available to the least-developed countries.

Joint integrated technical assistance programme

This ITC/UNCTAD/WTO Common Trust Fund receives funds from 13 donors and provides capacity building to government officials of developing countries on the WTO agreements since 1998. Recently this included two regional workshops on the SPS agreement in Zambia and Mali and two regional workshops on the TBT agreement in Malawi and Cotonou.

Contact: http://www.jitap.org/

Standards and Quality Management programme

This programme assists enterprises and organizations dealing with Standardization, Quality Assurance, Accreditation and Metrology (SQAM) in developing countries. Its work comprises all standards, also in non-food sectors, but the focus is on quality standards.

Training materials and information products that may be of interest to the fruit and vegetable sector include:

- Training packs on SPS and TBT: The WTO/TBT Agreement; a business perspective.
- ISO 9001 Fitness Checker: CD-ROM sold through national trade support organizations, with a question & answer mechanism that guides enterprises through requirements and checks what still needs to be done for certification.
- World Directory of Information Sources on Standards, Conformity Assessment, Accreditation, Metrology, Technical Regulations, and Sanitary and Phytosanitary Measures: Includes standards bodies, TBT/SPS enquiry points, legal metrology organizations, laboratories and accreditation bodies; contact points for Codex Alimentarius Commission, OIE and IPPC.

Handbooks:

Export Quality Management: An Answer Book for Small and Medium Sized Exporters. 2001 (+ national adaptations with partner organizations in Argentina, Bangladesh, Brazil, China, Korea, Malaysia, Nigeria and Central Asia)

ISO/ITC 2002. ISO 9001 for Small Businesses: What to do. Revised edition

Contact: http://www.intracen.org/eqm/

International Trade Centre/Commonwealth Secretariat (ITC/ComSec): Influencing and Meeting International Standards

This is a joint initiative of ITC with the Commonwealth Secretariat, implemented in the period 2003-2005. Its objective is the identification of training needs and development of project proposals for the implementation of the WTO TBT and SPS agreements and participation in the relevant WTO committees.

Case studies were conducted in 2003 in Jamaica, Kenya, Malaysia, Mauritius, Namibia and Uganda that have resulted in a publication with recommendations for technical assistance (see overview of analytical work). Workshops were held in Cairo and Bangladesh on the SPS agreement and in Kyrgyzstan, Tajikistan and Kenya on the TBT-agreement. An international workshop with donor countries was held in Geneva 2005 to review Mentoring and Twinning Arrangement recommendations and to develop project proposals.

Contact: http://www.intracen.org/eqm/pages/geneva_workshop_june05.htm

ITC Bolivia: Promotion and expansion of exports of selected products

This project started in 2001 and is implemented by ITC in collaboration with SIPPO and the Instituto Boliviano de Comercio Exterior (IBCE), the Centro de Promoción-Bolivia, C-PROBOL and Cámara de Exportadores de Santa Cruz (CADEX). The project is funded by the Swiss Government.

The project's objectives are to increase export capacity and exports, including exports of nuts, beans and organic products. The module on quality management provides assistance in the areas of ISO/IEC 17025, HACCP and ISO 9000.

Contact: www.exportebolivia.net

5. UNITED NATIONS CONFERENCE ON TRADE AND DEVELOPMENT (UNCTAD)

Most of UNCTAD's work on standards is in the area of environmental standards under its Trade, Environment and Development Programme.
http://r0.unctad.org/trade_env/test1/openF1.htm

Consultative Task Force on Environmental Requirements and Market Access

The Consultative Task Force (CTF) was inaugurated in June 2004 and held its first substantial meeting in November 2004. The CTF is funded by the Netherlands. Its objective is to assist developing countries in analyzing key trends of environmental requirements in export markets. Furthermore, the CTF seeks to exchange national experience on pro-active approaches to meeting these environmental requirements with a view to maintaining market access, harnessing developmental gains and safeguarding social welfare.

The CTF works through open-ended multi-stakeholder forums. The first meeting recommended that a working group of CBI (NL), FAO, Inmetro (Brazil), and others would be set up to comment on a draft feasibility study prepared by UNCTAD on the possible added value of an internet portal on environmental and related health requirements for market access. The meeting also recommended that projects should be developed to assist developing countries to develop national GAP to be benchmarked against EurepGAP.

Contact: http://www.unctad.org/en/docs//ditcted20052_en.pdf

Capacity-Building Task Force for Trade, Environment and Development

This Task Force was set up in 2000 by UNCTAD and the United Nations Environmental Programme (UNEP). Its objective is to strengthen the capacities of developing countries and countries with economies in transition, to effectively address trade-environment-development issues. It has developed many activities, many not related to standards.

However, a Policy Dialogue on Promoting Production and Trading Opportunities for Organic Agricultural Products was organized in 2002 in Brussels. This dialogue has resulted in a programme on Promoting Production and Trading Opportunities for Organic Agricultural Products in East Africa that is planned to start in August 2005.

Contact: http://www.unep-unctad.org/cbtf/

At UNEP: Asad Naqvi at UNEP, asad.naqvi@unep.ch, at UNCTAD: Nuria Castells, nuria.castells@unctad.org

UNCTAD-FIELD II

UNCTAD-FIELD II or the: Building Capacity for Improved Policy Making and Negotiation on Key Trade and Environment Issues is a follow-up to the UNCTAD-FIELD I project. It is implemented by UNCTAD and the Foundation for International Environmental Law and Development (FIELD). The planning phase was executed in 2002 and implementation of the project started in 2003. The project has a budget of one million pounds sterling and is funded by DFID.

The project is implemented in 15 developing countries in three regions, with one core country in each region (South-east Asia, East and Southern Africa and Central America and the Caribbean). For continuity there is a partly overlap with target countries of UNCTAD-FIELD I project. Each region was asked to select two key issues.

The Latin American countries (Costa Rica, Cuba, Guatemala, Honduras, Nicaragua, Panama and the Dominican Republic) concentrate on environmental requirements and market access, and especially on organic agriculture and organic markets.

South-east Asian countries selected the theme of linkages between environmental requirements and market access, including their export competitiveness. Horticulture is among the focus product groups for Bangladesh, Cambodia, China, Philippines, and Viet Nam. No activities are reported for Africa.

Contact: Project manager Latin America: Nuria Castells, nuria.castells@unctad.org

Analysis of trade implications of ISO 14001 and training

In 1997 UNCTAD organized an Expert Meeting to examine the trade implications for developing countries of international standards for environmental management systems. Follow-up analysis was funded by Italy and the Netherlands. The results have been incorporated into the current training package on trade, environment and development (also available online) in its module 6 on Implications of international standards for environmental management systems, particularly ISO 14000, for developing countries and countries in transition.

Furthermore, a trade policy capacity building project for India has also dealt with trade implications of ISO 14001 and possible strategies to promote the use of environmental management systems by the Indian industry.

Contact: meeting and analysis: rene.vossenaar@unctad.org, training: Nuria Castells, nuria.castells@unctad.org

Reconciliation of Environmental and Trade Policies

This project, funded by the Netherlands, was implemented by UNCTAD in cooperation with UNDP and the German Association for Technical Co-operation (GTZ) in 1999 and 2000.

It was divided in two clusters and the second cluster concentrated on promoting the export of environmentally preferable products of developing countries.

The objective was to:

- encourage company or (industry) association partnerships between eco-pioneers in developed and developing countries along the supply chain;
- facilitate access to information on and review of existing and emerging environmental requirements in target markets;
- facilitate the training of managers on cleaner production methods and products; and
- encourage exporting firms in using environmental management systems, such as ISO 14001.

A bilateral workshop was organized between Indian exporters, export promotion boards and Government bodies and German importers, wholesalers, industry associations and Government institutions for enhancing export of organic food and beverages from India to Germany. Another seminar was organized in 2000 at BioFach. Contact: Ulrich Hoffmann. ulrich.hoffmann@unctad.org

6. WORLD TRADE ORGANIZATION (WTO)

The WTO regularly organizes courses for government officials from developing countries and economies in transition.

- WTO Trade Policy Courses: 3 months duration
- Specialized course on SPS measures in Spanish and e-learning modules on the SPS Agreement
- Regional workshop on the SPS Agreement in Jamaica, in collaboration with the IADB, CARICOM and the Government of Jamaica

http://www.wto.org/english/tratop_e/devel_e/train_e/tradepolicycourse_e.htm

The WTO has also created over 100 computerized reference centres in trade ministries in developing countries and in headquarters of regional coordinating organizations.

7. UNITED NATIONS DEVELOPMENT PROGRAMME (UNDP)

Time did not permit to make a comprehensive overview of all UNDP projects that have a component on standards. An example of such a project is Rural Enterprise Development Programme in Bhutan, which UNDP supports in collaboration with SNV, FAO and UNIDO. This programme is implemented from 2002 to 2007 to build a positive environment for rural enterprise and take advantage of business opportunities for niche products. This includes developing a management information system, and formulating standards and quality control guidelines. In addition, a formulation mission funded by the EU in the spring of 2005 was to formulate an agricultural production project with a certification component.

Contact: http://www.undp.org.bt/poverty.php

8. REGIONAL ORGANIZATIONS

Inter-American Institute for Cooperation on Agriculture (IICA) Agriculture Health and Food Safety Directorate

Agriculture health & Food safety is an important theme for the Inter-American Institute for Cooperation on Agriculture (IICA). IICA supports the development of regulatory mechanisms, science-based technical capacities, and institutional infrastructure. The organization also supports the implementation of the SPS Agreement and of decisions of the OIE, IPPC and Codex. Furthermore, IICA assists in the improvement of national agricultural health and food safety services and in the development of food safety capacity throughout the food chain.

Since 2003, IICA and USDA implement the Initiative on Strengthening institutional capabilities in the field of SPS measures, funded by USDA. This initiative aims to promote the presence and active participation of capital-based experts at meetings of the SPS Committee.

Contact: IICA provides the Infoagro.net web site with very up-to-date information on food safety under its agrosalud heading: http://infoagro.net

United Nations Economic and Social Commission for Asia and the Pacific (UNESCAP)

The UN Economic and Social Commission for Asia and the Pacific (UNESCAP) has developed a programme on Marketing Green and Organic Agricultural Produce as a Tool for Rural Poverty Alleviation. The programme is implemented since 2000 and targets governmental, NGO and research institutes in Asia and the Pacific.

The programme's objectives are:

- to highlight the positive link between effective marketing of green and organic produce and rural poverty alleviation;
- to enhance the capacity of governmental and non-governmental organizations in Asia to design and build marketing channels for organic and green produce

by disseminating existing successful practices;
- to facilitate structured information flows.

Under the programme UNESCAP has initiated the Asia-Pacific Information Network on Organic Farming and Green Food (OFGF) to strengthen capacities to promote and practice organic farming and sustainable agriculture. The network is facilitated by the China Green Food Association and has seven member countries.

The network provides technical advisory services, training, study tours, information and staff exchange. Country reports have been prepared. A symposium on pro-poor certification systems for green and organic produce was organized in China in June 2005.

Contact at UNESCAP: Yap Kioe Sheng yap.unescap@un.org, Margot Schuerman, schuerman.unescap@un.org http://www.unescap.org/pdd/prs/ProjectActivities/Ongoing/GreenOrganicTool/green_organic_tool.asp

OFGF: http://www.ofgf.net/index.htm (Out of order since first visit, please see reference http://www.unescap.org/pdd/prs/organic.asp)

Asia-Pacific Economic Cooperation Council (APEC)

The Agricultural Technical Cooperation Working Group (ATCWG) of APEC is organizing various standards-related workshops in Bangkok. A workshop on supply chain management in August 2005 is to improve university-industry linkages and to propose action plans with a focus on quality standards in international trade. This is to be followed by a workshop on quality of fresh produce in September 2005.

Furthermore, in 2005 the ATCWG approved a work plan that includes the development of a network system on grade standards, requirements and regulations and capacity building activities on quarantine measures, the SPS agreement, pest risk analysis and the ISPM 15 standard on wood packaging.

Contact: http://www.apec.org/apec/apec_groups/working_groups/agricultural_technical.html

Southern African Development Community (SADC)

The Food Agriculture and Natural Resources Department (FANR) of the Southern African Development Community (SADC) is reviewing the new EU pesticide MRLs and preparing a project with COLE-ACP for capacity building.

Contact: http://www.sadc.int/index.php?action=a1001&page_id=fanr_agriculture

The Southern African Development Community Accreditation (SADCA) is the regional accreditation structure. The SADCA mandate is to define a suitable accreditation structure for the region and facilitate the creation of a pool of internationally acceptable accredited laboratories and certification bodies.

Contact: http://www.sadca.org/, http://www.sadc-sqam.org/

Association of Southeast Asian Nations (ASEAN)

Within the framework of the Association of South East Asian Nations (ASEAN), a proposal for a regional GAP was developed in 2001. In 2003 the project, funded by ASEAN and AUSAid, was redesigned with inputs from the Ministries of Agriculture. The project has developed a compendium on ASEAN Quality Standards and a compendium on SPS requirements. An ASEAN-GAP is under development. A workshop to finalise the GAP will be held in Singapore in November 2005. For 2006 train-the trainer workshops are planned. Pre-training activities have taken place in Cambodia, Myanmar, Lao People's Democratic Republic and Viet Nam, to enable them to fully participate in the GAP development.

Contact: www.aphnet.org

9. BILATERAL ASSISTANCE

European Information System for Organic Markets (EISfOM)

This EU funded programme intends to establish extensive databases with information

on organic markets. However, so far only data on organic production in the European Union are available. As a first step, an inventory of existing organic market data collection systems at the national level has been made. In November 2005 EISfOM held a seminar entitled Towards an European Framework for Organic Market Information. It may therefore be expected that in the future EISfOM will publish market data that are of relevance to producers and exporters in developing countries.

Contact: http://www.eisfom.org/

Centre for the Promotion of Imports from Developing Countries (CBI)

The Centre for the Promotion of Imports from Developing Countries (CBI) was established in 1971 and is an agency of the Dutch Ministry of Foreign Affairs. The centre seeks to contribute to the economic development of developing countries by strengthening the competitiveness of companies from those countries on the EU market. CBI considers social values and compliance with the most relevant environmental requirements to be an integral part of its policy and activities.

The CBI offers the following programmes:

- Market information:
  CBI's database on market information and non-tariff trade barriers on more than 50 product groups, including market surveys, strategic marketing guides and market entry and export planning manuals. The CBI Access Guide provides a very user-friendly and up-to-date database on all the EU regulations and private sector and voluntary standards. Registration for companies and business support organizations in developing countries is free of charge. (http://www.cbi.nl/accessguide/)
- Company matching:
  The company matching programme links well-versed suppliers in developing countries to reliable importing companies in the European Union and vice versa
- Export Development Programmes (EDPs):
  EDPs assist entrepreneurs in developing countries in entering and seeding on the EU market and/or consolidating or expanding their existing market share. This includes compliance with regulations and private standards and other market requirements. The EDP on Fresh Fruits and Vegetables is currently being implemented in Egypt, Jordan, Kenya, Senegal, and Uganda. Contact: Peter van Gilst (31)10-2013415. The EDP on organic food ingredients for industrial use is being implemented in Bolivia, Colombia, Cuba, Ecuador, Egypt, Ethiopia, India, Indonesia, Pakistan, Peru, Philippines, Sri Lanka, Tanzania, Uganda and Zambia. Contact: Cor Dieleman (31)10-2013423.
- Training Programmes for exporters and business support organizations.
- Business Support Organizations development programme

Contact: http://www.cbi.nl/, cbi@cbi.nl

Swiss Import Promotion Programme (SIPPO)

The Swiss Import Promotion Programme (SIPPO) was launched in 1982 and operates under the Swiss State Secretariat for Economic Affairs. SIPPO helps small and medium-sized enterprises in emerging markets and markets in transition to enter the Swiss and European Union market, and provides Swiss importers with assistance in finding new products, new suppliers and new sourcing markets.

SIPPO offers:

- Trade and market information
- SIPPO produces market overviews and information on European norms, standards, quality requirements and import regulations, customs regulations and charges. Examples of publications:
- SIPPO and FIBL. 2001 (2004). The Organic Market in Switzerland and the

European Union. Zürich/Frick, January 2001, 2nd Edition: 2004.
- SIPPO. 2001 (2002) Fruits and Vegetables / Switzerland (With a large section on regulations and buyers' requirements)
- SIPPO. 2004. Fruits and Vegetables / Macedonia
- SIPPO and CBI. 2005. Exporting to Switzerland and the European Union
- Available at: http://www.sippo.ch/cgi/news/publications.asp?mode=6#agrimc
- Trade development programme:
- Support in design, quality management and product adjustment and sales promotion measures such as mailshots and trade fair attendance. SIPPO also examines cooperation with Swiss companies in a private-public-partnership.
- As part of its Fruits and vegetable programme, companies from Bulgaria, Ghana, Ecuador and Viet Nam will participate in Fruit Logistica fair in 2006
- As part of its Organic products programme, companies from Bolivia, Bosnia and Herzegovina, Bulgaria, Egypt, Ghana and Peru will participate in BioFach 2006
- Trade promotion
- SIPPO attempts to find exportable products for which there is a demand in the Swiss and the EU markets and supports the establishment of contact with new suppliers (sourcing).
- Training programmes on: export marketing; export administration and logistics; process-oriented marketing; Export Quality Oriented Enterprise Profiling Project; ISO 9000 / 9001; HACCP; organic production; and export promotion tools for the Swiss market.

Contacts: www.sippo.ch, info@sippo.ch

United States Agency for International Development (USAID)

The USAID Trade for African Development and Enterprise (TRADE) initiative seeks to help African countries to make better use of opportunities offered by the African Growth and Opportunity Act (AGOA).

The initiative is opening several TRADE hubs that undertake various standards related activities.

West African Trade Hub

The West African Trade Hub (WATH) has its office in Ghana, but another office just opened in Senegal. WATH is working with the Economic Community of West African States (ECOWAS) and the Union Economique et Monétaire Ouest Africaine (UEMOA) to harmonize West African sanitary and phytosanitary standards. And it will provide training to officials to participate fully in World Trade Organization talks. Furthermore, it liaises with US Agencies and international organizations to train export-ready West African companies and public institutions in SPS requirements for exports into the United States.

Contacts: Kofi Humado at khumado@watradehub.com http://www.watradehub.com/

East and Central African Trade Hub

The East and Central African Trade Hub (ECATrade Hub) has its office in Kenya. The Hub plans to work with the private sector for a more effective use of international trade standards, ecolabelling and ISO environmental management system standards.

The hub has published the following publications relating to standards:
- ECA Trade Hub. 2005. All you have to know about the European Community's Rules of Origin
- William Hargraves, ACDI-VOCA. 2005. Survey of Existing and Planned SPS/ Food Safety Standards Activities in the COMESA Region.

Contact: http://www.ecatradehub.com/home/index.asp

Southern African Trade Hub

Within the Southern African Trade Hub standards related activities mostly take place under the Trade Competitiveness Component. Among other activities, this component works with the horticulture and cotton supply chains and seeks to improve the ability of firms to deal with emerging quality standards. With regard to increasing market access, baby corn and baby carrots from Zambia, table grapes from Namibia, and litchis from South Africa are the first targets for new admissibility into the United States. In the paprika sector, the TRADE will focus on helping industry to gain HACCP accreditation and international certification for good laboratory practices and testing.

Contact: http://www.satradehub.org/

Other examples of bilaterally funded assistance projects

It was not possible to track all bilaterally funded agricultural projects with a standards or certification component. Below are just three examples of such projects.

TechnoServe: organic pineapple exports from smallholder producers in Ghana. TechnoServe is a non-profit organization, founded in 1968 in the United States, to provide the rural poor of the developing world with the technologies they needed to improve their productivity. By the early 1970s, however, the organization evolved to focus on community-based, small-business development. Since 1998 TechnoServe serves business of all shapes and sizes and draws staff from the private sector.

TechnoServe has been providing technical assistance to Ghanaian pineapple farmers and processors since 1993. One of TechnoServe's clients is Athena Foods Limited, a company that processes pineapples and citrus fruits into concentrates and fruit juices for local and export markets. Athena liked to tap into the growing and more lucrative organic food market. TechnoServe linked Athena to 311 small-scale organic pineapple and citrus farmers whose only buyers had been local market women. TechnoServe helped the farmers to prepare the documentation, institute the internal control systems and get the technical training they needed to receive their organic certification.

http://www.technoserve.org/africa/ghana-pineapple.html

CLUSA: Organically grown and certified coffee, cacao, sesame and cashew to markets in the United States, Europe and Japan and in sales and distribution of organic vegetables and other commodities to local restaurants, hotels and supermarkets in El Salvador.

Organized in 1916 as the Cooperative League of the USA (CLUSA), the National Cooperative Business Association (NCBA) is still recognized in many countries under the CLUSA name. NCBA's CLUSA International Program began providing assistance to developing countries in 1953.

In El Salvador, through the Non-Traditional Agricultural Exports (NTAE) Production and Marketing Project, CLUSA worked with 128 cooperatives and 6 secondary organizations. The project pioneered in organic production, in exporting organically grown and certified coffee, cacao, sesame and cashew to markets in the United States, Europe and Japan and in sales and distribution of organic vegetables and other commodities to local restaurants, hotels and supermarkets. The project benefited 60 000 producers and their families. Two farmer organizations involved in the project won the country's first major environmental awards for their organic production work. CLUSA assisted to launch PROEXSAL, an import/export cooperative owned by farmer cooperatives and grower groups with some exporters. PROEXSAL provides quality control for horticultural crops shipped from the rural areas to the city for sale and has imported and sold US and Guatemalan horticultural commodities. It continues to market fruits and vegetables grown by Guatemalan and Salvadoran farmers, 80 percent of which are organically produced, to restaurants, hotels and supermarkets.

http://www.ncba.coop/clusa.cfm

ICCO and Agrofair Assistance & Development: Development of new fruit sources that can be marketed in Europe under the Fairtrade label organic fruit.

AgroFair Ltd. is an importer and distributor of Fairtrade labelled and organic tropical fresh fruit. Agrofair is based in the Netherlands but its fruit is sold in various European countries. The company is co-owned by its producers. Agrofair Assistance & Development is an NGO and works in close cooperation with AgroFair Ltd. It develops a wide range of fair-trade and organic fruit produce by assisting conventional producers with conversion and guiding producers through different kinds of certification processes in various areas such as social (e.g. FLO, ETI and SA8000), environmental (e.g. BCS, Skal and Ecocert) and technical (e.g. EurepGAP, ISO, HACCP) certifications.

ICCO (Interchurch organization for development co-operation) is based in the Netherlands and receives funds from the Dutch Government. ICCO provides funds to Agrofair Assistance and Development and ICCO will provide further support in the field of sales and certification and possibly engage in lobbying activities with regard to trade barriers (bananas, citrus). In the past ICCO has also supported fair-trade banana producers in the Dominican Republic.

www.icco.nl/english and http://www.agrofair.nl

10. PUBLIC-PRIVATE PARTNERSHIPS

Sustainable Commodities Initiative

This is an initiative of UNCTAD and the International Institute for Sustainable Development (IISD), an independent, non-profit company. The umbrella initiative is funded by the IDRC/CDRI of Canada and has the objective to improve the social, environmental and economic sustainability of commodities production and trade by developing global multi-stakeholder strategies on a sector-by-sector basis.

The initiative has up till now focussed on coffee and meetings and workshops have led to the establishment of the Sustainable Coffee Partnership with its own programme and funding structure.

Contact: cwunderlich@iisd.ca

The Global Food Network

The Global Food Network was initiated by the EU Commission Scientific Officer and its activities are facilitated by Agri Chain Competence Centre (ACC), a consultancy company in the Netherlands. It is essentially a network of research institutes from Europe (Portugal, United Kingdom, Spain, Netherlands, Denmark and Hungary), MERCOSUR (Argentina, Brazil, Paraguay and Uruguay) and ACP countries (Uganda, Kenya and the Caribbean).

The Network was started in 2002 and will be operational at least until 2005 in order to improve the cooperation in research on food safety and food quality between EU countries, ACP and MERCOSUR. Activities include an inventory of public and private quality and safety standards, conferences, electronic discussions, reports and internationally attuned research agenda's

Contact: http://www.globalfoodnetwork.org info@globalfoodnetwork.org.

ACCC: (31)735286659

The Food Quality Schemes Project

This project is implemented by the Institute for Prospective Technological Studies of the EC Joint Research Centre in cooperation with DG Agri and DG RTD and the University of Bologna. Funds come from the European Union. The project is planned to run from 2005 to 2007. The project will analyse the opportunity to implement a Community-wide legal framework for protection of Quality Assurance and Certification Schemes in the Food Chain. Components of the project will be a research study and stakeholder workshops. This will lead to a report followed by a stakeholders' hearing to discuss the outcomes and a final conference in 2006/07.

Contact: jrc-ipts-foodquality@cec.eu.int

Sustainable Trade and Innovation Centre (STIC)

This initiative was launched in Brussels in 2002 by the European Partners for the Environment (EPE), Commonwealth Science Council and Royal Tropical Institute (KIT). The objective was to establish a global partnership for information exchange, innovation and forging business partnerships. However, no follow-up activities have been reported since.
Contact: http://www.epe.be/euhub/

Sustainable Food Laboratory

General
The Sustainable Food Laboratory is a collaborative initiative of companies, governmental institutes and civil society organizations. Participating companies are Carrefour, General Mills, Nutreco, Organic Valley Cooperative, Rabobank, Sadia, Sodexho, Starbucks, SYSCO, and Unilever. Governmental institutes come from Brazil, the Netherlands, the European Commission and the International Finance Corporation (IFC), and the World Bank also participate. Civil society is represented by Consumers International, Oxfam, The Nature Conservancy, and the World Wide Fund for Nature(WWF).

The Secretariat of the Lab is formed by Generon consulting, Sustainability Institute (a non-profit consulting group) and the Synergos Institute (non-profit, Global Leadership Initiative). The Lab is planned to function from 2004 to 2006 with the objective to make food systems more economically, environmentally, and socially sustainable.

Funding comes from participating organizations and from Shell Foundation, W.K. Kellogg Foundation, Charles Leopold Mayer Foundation and King Baudouin Foundation. The Lab secretariat has a budget of US$3.2 million, of which US$1.5 million remains to be raised. Funds for separate pilot initiatives of the Innovation Teams have also to be raised.

Responsible Commodities Initiative
One of the lab's sub-projects is the Responsible Commodities Initiative. Participating organizations are the Brazil Specialty Coffee Association; Ethical Certification and Labeling Space, IFC, Medley Global Advisors; Innovation Network, Min. of Agriculture NL; Rabobank International; Rainforest Alliance; The Nature Conservancy; Unilever and WWF.

Its objective is to mainstream sustainable business practices in food chains, especially in palm oil, cotton, soy, sugar and coffee chains.
Planned products:

- Commodity Meta-Standard (~ matrix to "value" existing standards)
- Commodity Purchasing screens (~ standard for sustainable procurement)
- "Equator Principles" for commodity finance (~ standard for sustainable investment)
- Shareholder activist information pack
- Commodity futures screens (It is not clear to the author what this means)

The Business Coalition for More Sustainable Food
Another subproject of the Sustainable Food Laboratory is The Business Coalition for More Sustainable Food (BCSF), to harness the buying power of food-related companies to create more sustainable food supply systems. The BCSF plans to: create a clearing house of best practices for production and marketing; coordinate opportunities for common purchase specifications that improve economics and enhance sustainability; initiate collaborative projects that solve problems up and down food chains; and to provide a safe space for collaboration with leaders from academia, non-profit organizations and government.

Latin America family farms

The subproject Latin America family farms works with farmers in the Dominican Republic, Guatemala, Brazil on innovation of food supply chains, including cost-benefit analysis of standards. The subproject will also facilitate learning across the hundreds of existing projects that address market access and sustainability of family farms.

Contact: http://www.glifood.org/

Hal Hamilton, Executive Director, Sustainability Institute, hhamilton@sustainer.org, +1 (802) 436-1277 x101

Adam Kahane, Director, Generon Public Service, kahane@generonconsulting.com.org, +1(978) 232-3500 x30

Ethical Certification and Labeling (ECL) Space

The ECL Space is implemented/facilitated by Pi Environmental Consulting. The steering group is formed by RBF/Yale University, UNCTAD, ISEAL Alliance, Consumers International, WWF, Imaflora, ScanComGroup Viet Nam, Fern/UICN, Asian coalition for SME development, Icontec and Unilever.

The ECL Space aims to solve problems that limit the acceptance and effectiveness of environmental and social certification and labelling. It conducted background analysis on different typologies of certification scheme and impact on market access in 2003 and 2004. A follow-up work programme is not yet published or has still to be decided.

Contact: Pierre Hauselmann phauselm@piec.org and Nancy Vallejo nvallejo@piec.org. http://www.piec.org/ecl_space/

The Working Group on Standards and Trade

In 2005 the World Bank took the initiative to create a Standards Working Group, to be facilitated by Chemonics International, a consultancy company. An inaugural meeting was held in June 2005 with participation of several multilateral and bilateral agencies, non-governmental organizations and consultancy companies.66 These organizations are also the potential members of the Standards Working Group.

The working group is intended to be a knowledge network on agro-food standards, but the precise mission, objectives and activities have still to be decided upon.

Contact: Steven Jaffee, sjaffee@worldbank.org, Matthew Edwardsen medwardsen@chemonics.com

11. NGO ALLIANCES

ISEAL Alliance

The International Social and Environmental Accreditation and Labelling (ISEAL) Alliance was established in 2000. Its members are FLO, FSC, IFOAM, IOAS, MAC, MSC, SAI, SAN/Rainforest Alliance, associate members: GEN, Chemonics. Funds come from GTZ, Overbrook Foundation and HIVOS Biodiversity Fund. The ISEAL Alliance mission is helping to create a world where ecological sustainability and social justice are the normal conditions of business.

The ISEAL Alliance activities are:

- Peer review for standard setting and for accreditation practices
- Social Accountability in Sustainable Agriculture project: to learn how to audit

[66] Agencies: FAO, UNCTAD, UNIDO, the European Commission (EC), Pesticide Initiative Programme (COLEACP-PIP), United States Agency for International Development (USAID), InterAmerican Institute for Cooperation in Agriculture (IICA), GTZ

NGOs: ISEAL Alliance, Rainforest Alliance, World Wildlife Fund (WWF), Oxfam, International institute for Sustainable development (IISD)

Consultancies: Chemonics International, Abt Associates, DAI, and the Institute for Food and Agricultural Standards at Michigan State University (MSU).

and certify against social and labour standards given the diverse social, cultural and economic situations in agriculture (2000–2004)
- Developed Code of good practice for setting social and environmental standards
- Code of ethics for ISEAL members
- Advocacy
- Services to members (e.g. tenders for external auditing against ISO norms)

Contact: http://www.isealalliance.org; Patrick Mallet pmallet@isealalliance.org, Sasha Courville, secretariat@isealalliance.org

The Pacific Institute and the International NGO Network on ISO (INNI)

The Pacific Institute was founded in 1987 and is based in Oakland, California, to provide independent research and policy analysis on issues at the intersection of development, the environment and security. Its Economic Globalization and the Environment (EGE) Program studies the effects of the increasingly integrated global economy on the environment and society.

As a member of the US Technical Advisory Groups, the EGE programme attends the ISO technical committees on issues including water management, ecolabelling and environmental communications. The Pacific Institute was a founding member of the NGO Working Group on ISO 14000, which worked to strengthen the voice of non-governmental organizations (NGOs) participating in the standards-setting process, and EGE programme director Jason Morrison currently serves as Chair of the ISO/TC 207 NGO Task Group.

Building on the ISO14001 experience, the Pacific Institute set up the International NGO Network on ISO (INNI), around 2003/2004. Active membership is limited to non-governmental organizations working on issues such as environmental management, climate change, water management, and corporate social responsibility, among others. Observer membership is open.

The objective of INNI is to ensure that any ISO-created environmental standard serves the public interest and protect the environment. By providing timely information on the activities of ISO to network organizations they can activate their constituents, provide guidance to decision-makers, and shape public opinion.

Contact: http://www.pacinst.org/ and http://inni.pacinst.org/inni/index.htm

Jason Morrison: jmorrison@pacinst.org

RAFI-USA Just Food programme

The Rural Advancement Foundation International (RAFI)-USA traces its heritage to the National Sharecroppers' Fund, which was founded in the 1930s. RAFI-USA concentrates on North Carolina and the south-eastern United States, but works also nationally and internationally. Its aim is a reliable supply of safe, healthy food by strong family farms and rural communities, and with close connections between consumers and producers, environmentally sound farming and safeguarding of agricultural biodiversity.

Under its Just Food programme it develops activities in the area of organic farming and organic, environmental, and fair-trade standards and labels that give small and modest-size farmers marketplace rewards.

RAFI drafted social justice standards for organic agriculture that they presented at a social justice workshop in 2003 in Canada at the IFOAM World Conference. They organized another social justice workshop with a broader agenda in 2004 in Thailand in connection with the IFOAM Organic Trade Conference. http://www.rafiusa.org/index.html

12. NATIONAL CERTIFICATION PROGRAMMES FOR BENCHMARKING

A distinct type of initiatives to address standard-related marketing constraints and opportunities are national programmes that are developed with the specific purpose of being recognized as equivalent to certification systems in import markets.

There are mainly two categories: organic regulations and national GAP programmes

National GAP programmes

ChileGAP: http://www.buenaspracticas.cl
Peru: http://portalagrario.gob.pe/dgpa_prac_agricolas.shtml
Mexico: http://www.mexicocalidadsuprema.com
Malaysia: farm accreditation scheme of Malaysia
http://agrolink.moa.my/doa/SkimAkreditasiLadangMalaysia.htm
China: http://www.cnca.gov.cn/ (Chinese only), http://www.eurep.org
ASEAN: www.aphnet.org

National organic programmes

The developing countries with national organic programmes that have been recognized as equivalent to the EU organic guarantee system are:

Argentina: http://www.infoagro.com/agricultura_ecologica/ecologia_argentina/NORMAS/normas.asp Costa Rica: http://www.infoagro.go.cr/organico/PLAN_ACCION_2000.doc

For other national organic programmes and legislation, please see the FAO Organic Agriculture Information Management System (Organic-AIMS):

http://www.fao.org/organicag/frame6-e.htm

Conclusions and Recommendations

1. Discussion and conclusions on standards and trade

The first part of this report has presented an overview of international agreements, national regulations and private standards. Standards have been examined by category: general quality, traceability and origin labelling standards; food safety standards; sustainable agriculture and Good Agricultural Practices; environmental standards; organic agriculture; and labour and social standards. The second part of the report has reviewed the literature on standards and trade. Finally, a summary of major operational initiatives has been presented.

The following general conclusions can be drawn from the above analyses.

Phytosanitary standards are only found in the regulatory domain – No private phytosanitary standards were found.

This is not surprising, as phytosanitary issues have long been regarded to fall in the public domain. Problems caused by imported plant diseases or pests may affect a country's economy and natural resources. However, the firms and persons involved in the movement of goods and the persons that may accidentally import these pests are generally not directly affected by the problems they cause. Phytosanitary problems affect ecosystems and domestic producers who have no power to impose phytosanitary measures themselves. Therefore, phytosanitary measures are taken by governments in the interest of the country as a whole.

For the other types of standards (i.e. food safety, environmental and social) there is a high degree of interaction between corporate, NGO and regulatory standards.

This interaction means that any analysis of private sector standards needs to take into account the regulatory framework. In general, governments set minimum regulatory standards. Food retail companies that compete mainly on quality will want to position themselves with a quality level above the regulatory minimum. As retail companies govern the supply chain, they will try to impose the highest possible standard on their suppliers. Innovations will be picked up soon by other retailers that also compete on quality. For areas that are of public interest, such as food safety, governments may then be tempted to raise minimum regulatory standards, forcing those companies that compete mainly on price to also adopt higher standards.

Such a "race to the top" would depend on the willingness to pay of consumers in the higher quality segments of the market. This would in turn depend on the perceived differences in quality between the minimum regulatory level and the "high quality standard" (hence the role of labelling in the case of credence goods).

In the case of food safety (see example below), the proliferation of private standards would stop if the regulatory requirements were close to the maximum level of food safety that is technically possible to achieve, as the perceived quality differences would be minimal. Therefore, technical innovations create an enabling environment for the emergence of higher food safety standards. Because food safety research is often publicly funded, this is yet another level of interaction between private standards and government.

The interaction between technical regulations and private standards can be illustrated by the three examples below.

Food safety standards

Minimum food safety requirements have existed at the governmental level (marketing standards) for a very long time and they have been to a large extent harmonized through the Codex Alimentarius.

The last decades have seen an accelerating trend of concentration and globalization of the food retail sector. Large-scale retailers have become the most powerful actors in the food supply chain and the importance of retailer-own-brands has increased at the expense of other (supplier) brands. During the same period, food scares have given rise to more stringent liability legislation (first in the United Kingdom in 1990, then in the European Union in 1999). Because retailers are liable for their own brands, they have had a powerful incentive to develop private food safety standards to prevent food safety scandals. The certification schemes benchmarked by the Global Food Safety Initiative are predominant. They often cite Codex standards, notably the HACCP guidelines.

However, legislation in the European Union (General Food Law, 2002) is now catching up with the private standards. The new EU law also makes HACCP implementation compulsory for food packers and manufacturers (implementation foreseen in 2006). Also the US legislation is becoming more stringent as a result of the Bioterrorism Act of 2002, but mainly in the form of registration and trace back requirements and an increase in the level of import controls. Furthermore the FDA has initiated the Action Plan to Minimize Foodborne Illness Associated with Fresh Produce Consumption.

Organic agriculture standards

The first organic agriculture standards were developed by producer associations. With the expansion of the market, labelling became necessary to convey the information on the organic production methods over greater distances to the final consumers. With the proliferation of organic standards and labelling and the occurrence of false claims, the organic movement (producers, traders and consumers) requested governments to develop legislation. Proliferation of national standards in turn led to the request for the Codex Alimentarius Commission to develop international guidelines.

However, numerous public and private organic guarantee systems and regulations still pose challenges to international trade. The intergovernmental organizations FAO and UNCTAD, some national governments and the private organic farming sector (farmers, traders, certification bodies and NGOs) represented by IFOAM, work together in the International Task Force on International Harmonization and Equivalence in Organic Agriculture.

Labour standards

The standard SA 8000 developed by the NGO Social Accountability International is based on the core conventions of the International Labour Organization. The Belgian Government recognizes the SA 8000 standard as equivalent to the requirements of its social label and allows SA 8000 certified companies to use its label.

Process standards tend to be prescriptive instead of results based

Results-based standards state the results that have to be obtained, but let the implementing companies choose how to achieve these results. By contrast, prescriptive standards set precise requirements for how products should be produced. Such prescriptive requirements tend to pose more difficulties for producers in other production systems than those for which the standard was originally developed or with which the authors of the standard are familiar.

By default, product standards are more results based than process standards. Some prescriptive clauses in process standards are difficult to avoid (e.g. the prohibition of the

use of synthetic pesticides in organic agriculture). However, process standards could be more results based than often is the case. For example, many food safety oriented standards aim to create hygienic production environments. Yet, instead of prescribing the desired result, they prescribe the means to achieve such results, to such details as the number and type of toilets that have to be available at a food processing facility.

Adherence to product standards can often be easily verified by looking at the product (e.g. for grading standards). Verification of adherence to process standards is however more difficult. That is why certification companies require extensive documentation in addition to the inspection of the production facility. Many standard developers already prescribe documentation requirements in the standards themselves. This makes it difficult for certification bodies to be creative in situations where documentation is problematic (e.g. due to high illiteracy rates). Overall, the need for documentation tends to make process standards more prescriptive.

Compliance with private standards is more relevant for exports to the European market than for exports to the US market

The difference between the buyer surveys commissioned by the World Bank is notable. In the report of the US buyer survey, Lamb et al. dwell on the challenges to comply with SPS measures implemented by the United States. In the report of the EU buyer survey, Willems et al. focus instead on private standards. What emerges from the literature is that the main constraint to exporting fresh produce to the United States is the governmental phytosanitary control system. The main constraint to exporting to the European Union is the proliferation of private standards.

In the United States, phytosanitary regulation is strict and strictly enforced, and therefore this remains the main entry barrier for many tropical fruits and vegetables from developing countries. An example is the obligatory heat treatment for mangoes and the frequent controls by US officials of heat treatment facilities in exporting countries. On the other hand, food safety measures are mostly in the form of voluntary codes. However, after an outbreak of food borne illnesses a particular origin may be banned until the problem is solved to the satisfaction of US officials.

US food retail companies require that suppliers comply with the law but unlike European retailers they have not developed standards themselves. The standards that have been adopted by US retailers have been originally developed by other stakeholders (for example organic standards were originally developed by producers) or in other countries (such as SQF).

In the European Union, the enforcement of phytosanitary regulations is reported to be more relaxed. Maximum residue level regulation has become strict, but the level of control is still reported to be low, albeit increasing. With entry possible at the regulatory level, suppliers face private sector demands. Partly to cover their liability risk and partly to protect their reputation, many retailers have developed requirements related to food safety that go beyond regulations or anticipate new regulations coming into force in 2006 under the new Food Law. European retailer associations have themselves developed standards for food safety and Good Agricultural Practices.

Arguably, the new EU food safety legislation, which is being phased in gradually, may change the situation. For those market operators that have not adopted the current private standards, minimum hygiene requirements for food packaging and processing will become more stringent. However, the actual effect will depend on the level of enforcement.

Private standards with the highest potential impact on market opportunities for developing countries are the Global Food Safety Initiative, EurepGAP and to a lesser extent organic agriculture.

The Global Food Safety Initiative

The Global Food Safety Initiative is important because it has a global scope, comprising both the US and EU markets. Retailer members of the GFSI told the OECD that they already require some food safety related certification from their developing country suppliers (either a GFSI benchmarked standard or EurepGAP). However, it should be realized that there are in effect 4 standards benchmarked against the GFSI: BRC, IFS, SQF1000/2000 and the Dutch HACCP code.

Although the standards are the same in essence, there are minor differences in specific requirements and in the competences required from auditors (see chapter 3 of Part 1). The differences in the requirements for the certification system prevent mutual acceptance of certificate equivalence. Suppliers may therefore still need multiple food safety certifications. However, according to an OECD survey, most retailers would prefer to have a single global food standard and certification system for food safety. This would decrease certification costs for the suppliers and allow retailers to switch suppliers and source across the globe.

The GFSI will have direct impacts on processors and packers of fruits and vegetables. Indirectly, it will affect primary producers through changes in sourced quantities or through changes in the sourcing patterns of the processors. The impact on market opportunities will be negative if the processors and packers cannot meet the standards. The impact may be positive if they can meet the standards and certification now enables them to convince buyers of the quality of their products (whereas they could not in the past).

EurepGAP

Whereas most retailers require a certification against a GFSI benchmarked food safety standard from their manufacturer suppliers, they increasingly require EurepGAP from the primary producers. At the time of writing, 27 food retailer groups in Europe supported EurepGAP. This affects directly small producers in developing countries. Having been developed in 2000 initially from a European perspective, and being highly prescriptive in nature, EurepGAP has a great potential to become a barrier to market entry. Only now an interpretation for small producers is being developed in Kenya. However, as with the GFSI, the impact of EurepGAP may be positive if it enables producers to convince buyers of the quality of their produce.

Organic certification and labelling

Developments in organic agriculture give conflicting indications as to how much it will affect market opportunities for developing country producers and exporters. The market for organic products is still expanding rapidly, whereas for most conventional food products the market grows very slowly. In certain markets for certain organic products, market share can be as high as 10 percent (e.g. for certain fruits and vegetable in the United Kingdom). However, globally, organic products constitute only 1 to 2 percent of the food market. This indicates that while organic standards presently have an impact on only a small proportion of farmers, the situation may change in the long run.

Organic labelling can have a positive impact on market opportunities for developing countries. Organic methods often require less capital (which is often scarce in developing countries) and more labour (which is often abundant in developing countries), giving developing countries a comparative advantage in organic agriculture. For producers in highly intensive production systems in developed countries it is more difficult to convert to organic methods, giving low-input producers in developing countries a comparative advantage

However, organic methods are often knowledge intensive, requiring high levels of literacy and good extension and education systems, which gives developing countries a disadvantage relative to developed countries. The proliferation of organic certification regulations, standards and labels increases certification costs and make switching markets more difficult. This problem is compounded for developing country producers who often have to pay more for auditor travel and for whom other transaction costs (translation of documents, etc.) may be higher too.

Overall, organic certification is likely to have a significant impact on market opportunities for developing countries: firstly, because the biggest and growing markets are the developed countries and there still exist supply constraints in some of these markets; and secondly, because organic products are sold at a premium.

Traceability requirements

Although not a standard per se, traceability requirements from the private sector may also have a substantial impact on market opportunities for developing countries. Both the United States and the European Union work towards regulatory implementation of one-step-back, one-step-forward traceability requirements. However, to enable swift recalls in case of a food safety failure, food retailers are increasingly implementing 100 percent traceability systems from the primary producer or even agricultural input suppliers to the final destination. New technological developments make this possible.

Although other certification programmes may affect fresh produce exports from developing countries, their current impacts can be considered as low.

Sustainable Agriculture Initiative Platform

It is difficult to assess the potential impact of the SAI Platform at first sight. The platform consists of major food manufacturers who form an important market for primary ingredient producers. However, the guidelines for potatoes and vegetables have been published only recently and the guidelines for fruits are still being developed.

The guidelines are developed with inputs from suppliers, i.e. the primary producers who have to implement them and go through a pilot testing process. Member companies do not seem to intend to adopt third-party certification programmes. Rather, they communicate the guidelines to their suppliers through business-to-business contacts as a part of their normal in-house quality assurance efforts.

All this together indicates that the implementation schedules are rather flexible and should not cause trade disruptions.

SA8000

This standard was developed for larger companies and does not involve a label on the product. The market share of the fruit and vegetable firms presently certified (Dole and Chiquita) is not directly affected by this certification, even though there may be indirect effects through reputation.

Rainforest Alliance

The Rainforest Alliance certification of bananas covers a large share of total Latin American production, but this is due to the certification of Chiquita plantations. Chiquita may have benefited from enhanced reputation, but their signature of the agreement with the ICFTU seems to have had more effect in this respect. The impact of the certification on the banana market may increase now that Chiquita is introducing Rainforest Alliance labelled bananas into Europe. Standards for citrus have been developed and a few firms have been certified, but this has not expanded further. No Rainforest Alliance standard exists for other fruits and vegetables.

Fair-trade

Except for bananas in the United Kingdom and Switzerland, fair-trade labelled fruits and fruit juices have an extremely low market share. Many fruit standards have just been developed and fair-trade labelled fruits and juices have just appeared or still have to appear in markets. Standards for vegetables have yet to be developed. Because of this low market share, fair-trade presently affects just a few fruit producer groups in each product category. For this reason, although fair-trade may be growing fast, organic agriculture will have a bigger impact for years to come.

ISO 9000 and ISO 14001

These standards have been mainly implemented by large companies and have become default certifications. Because of lax interpretation by many implementing companies and certification bodies, these certifications have got the name of being not more than a paper exercise. Thus, they have reportedly lost value in business-to-business relationships and consequently are less an advantage in marketing. Evidence that the absence of such certification could lead to exclusion from buyer contracts could not be found.

OHSAS

Because OHSAS is a new standard, no information on its implementation was found at all. As a management system that was modelled on ISO 9000, it could well have the same fate.

NutriClean

This label is only used in the west of the United States. Currently, its market share is very low.

2. Recommendations for future research

The overview presented in Part 2 of this report gives an idea of the directions of recent research by academic and other institutions. The impact of private standards on trade is a rapidly evolving area of analysis. Ongoing developments in global fresh produce supply chains, including the concentration in the food retail sector and the proliferation of voluntary and private sector standards, continue to give rise to new research questions.

Some topics have been more researched than others. There is, for example, a rapidly growing body of research taking a supply chain (or a value chain) approach. Case studies and analyses of specific national export industries or specific supply chains have already yielded many insights on the nature of barriers and the nature of the costs of compliance and benefits. It has become clear that the cost of compliance is farmer specific, as it depends on the initial production methods applied, the institutional and financial support received, the access to credit and information, the ecosystem and climate and the available infrastructure such as laboratories and telephones. More case studies are underway in FAO and various other organizations. Further case studies may still be useful for specific farmer groups or industries or specific standards not formerly studied. It should however be expected that they would yield few additional insights that would be generally valid.

The papers on methodology listed in section 2 of Part 2 indicate that economists have yet to solve many methodological problems before they can quantify the impacts of private standards in a meaningful way. The lack of large and reliable data sets poses another problem. The development of methodologies and data sets will have to go in tandem. Data collection will need to be guided by the developed methodologies, and methodology development needs to take data limitations into account.

Some attempts at modelling the impact of technical regulations (such as Maximum Residue Limits, MRLs) that are gradually phased in have been undertaken. However, most work has only been done at the theoretical level so far.

For a better understanding of the impacts of private standards on market opportunities for developing countries, further research is necessary in the following areas:

i. Quantities of products certified against private standards
ii. Distribution of compliance costs and value added along the supply chain through price transmission.
iii. Consumer willingness to pay higher prices for certified and labelled foods
iv. The impact of private standards on the competitive position of fresh produce industries in developing countries.
v. Policy options and the impact of different policy choices as regards private standards
vi. The effectiveness of different approaches to technical assistance
vii. Implications of the GATS agreement for standard setting and con formity assessment services

Each of these areas is shortly discussed below.

i. Market share

An understanding of the percentage of trade in fresh produce that is governed by private standards would be a logical basis for the analysis of the impact of these standards, yet

this information is not readily available. Only quantitative studies on the organic and fair-trade markets are available. This is not very surprising, as most of the other standards and certification programmes do not provide for product labelling. Due to the absence of label on the products, the market that is targeted consists of corporate customers (in particular retailers) rather than final consumers. The volume and value of certified produce purchased by retailers are not published. Furthermore, this information may be considered to be commercially sensitive.

Retailers may publicly claim that they require a certain certification while they continue to buy uncertified produce. They may not demand certificates from trusted suppliers, but it is not in their interest to disclose this information for fear that other suppliers might refuse to invest in certification.

Therefore, reliable figures on the market share of these standards are not readily available. Obtaining reliable estimates would greatly improve the quality of further analysis. For example, many authors claim that some private standards are becoming de facto compulsory for market entry. Such claims could be validated by data on the share of the market actually governed by these standards.

ii. Distribution of compliance costs and/or consumer price premiums along the supply chain through price transmission

Supply chain studies suggest that cost distribution is minimal for food safety standards that are imposed on producers: additional production costs are not compensated by higher farm-gate prices.

The study by Kilian et al. (2005) suggests that the change in revenues resulting from conversion to organic or fair-trade standards varies along the marketing chain. At a given point in the chain the price premium may not or only just cover the compliance costs, while at other points in the chain they more than offset extra costs.

Again, the lack of reliable data hampers such analysis. FOB and wholesale prices are often available, but because retailers increasingly buy directly from importers or exporters, wholesale prices cover a diminishing share of the market. Price data of direct transactions are commercially sensitive and actual prices paid may differ from officially published prices due to pay-back clauses in contracts or promotional actions.

To analyse margins, price data have to be complemented by data on costs. Studies on the cost of compliance show that the costs generated by standard and certification are highly variable, depending on origin and firm specific situations. The costs incurred by retailers (extra shelf space, etc.) are seldom available. The analysis of cost/premium transmission is further complicated by rapid supply and price fluctuations, due to the seasonal and perishable nature of fresh fruits and vegetables.

iii. Consumer willingness to pay

An increasing number of studies use experimental auctions to determine the consumers' willingness-to-pay for certain credence goods, or the discount required in the case of negatively perceived aspects (e.g. GM food). A methodological discussion and two examples are included under section 8 of part 2. Despite some methodological issues, these experimental auctions are believed to give more reliable results than surveys based on interviews. They could therefore be an important tool for determining the market potential of labelled certified products marketed at higher prices. However, no auction of organic versus conventional fresh fruit and vegetables was found in the literature surveyed by the author.

iv. Analysis of the impact of private standards on the competitive position of fresh produce industries in developing countries

The above overview includes several studies on the effects of standards on a particular industry in a specific country. They usually focus on the (lack of) investments made

resulting in the success or failure to enter markets governed by standards and on related structural changes in the sector.

Some larger research projects have done several of such industry studies and then tried to identify some general patterns. However, no comparative studies on the same industry across many countries have been undertaken so far (e.g. a cross-country study of the investments in the pineapple sector in reaction to EurepGAP).

It would also be interesting to analyse the market shares of different origins before and after the implementation of a standard. This would give an indication of which countries have managed to take advantage of new standards. However, it would tell little about the causal relationship and the causes for this success. Since most private standards (EurepGAP, BRC, SQF etc.) have only been developed recently and their adoption is still ongoing, it may be too early for such an analysis.

v. Policy options and the impact of different policy choices to deal with the rise of private standards

Many papers provide policy recommendations and other papers even focus on policy options in reaction to emerging private standards. However, no study was found on the effect of different policy choices on export opportunities for farmers. For the organic farming sector, enough data may be available to make such an analysis.

Exports from countries with a similar potential but different policy responses could be compared. Potential research questions could be: do developing countries that have developed a national organic legislation have a better position in organic export markets than countries that have not? What has been the impact of setting up national certification bodies? What has been the effect of training programmes on organic agriculture for extension agents?

vi. The effectiveness of different approaches to technical assistance

Technical assistance can be provided at governmental level, at the level of auditing, certification and accreditation services, at the level of industry association and at the farm level. Technical assistance can also have various aims, such as increasing the negotiation capacity of countries or farmer associations, increasing standard implementation capacity or linking farmers to export niche markets for labelled products. An analysis of the effectiveness of technical assistance should clearly take into account these different levels and objectives.

The author found very few analytical studies that evaluate different forms of technical assistance in the horticultural sector. As many private standards have been developed only recently, related technical assistance is recent. Most experience has been gained so far in assisting farmers in meeting the requirements of import regulations and of certification programmes for organic and fair-trade markets (especially for coffee, banana and cotton). The number of projects that give assistance to farmers in the adoption of private standards is growing.

vii. Implications of the GATS agreement for standard setting and conformity assessment services

There are various studies on the implications of the TBT and SPS agreements for standard setting and conformity assessment in the agricultural sector. Some specific issues may still need further analysis, such as Article 4.1 of the TBT Agreement on the reasonable measures that members are expected to take to ensure that non-governmental standardizing bodies within their territories accept and comply with the Code of Good Practice for the Preparation, Adoption and Application of Standards.

In section 1.1 of Part 1 of this report, it was mentioned that some authors argue that standardization and conformity assessment are a service industry in itself and would fall thus under the GATS agreement. The studies related to standards and GATS that

were found deal with standards in service industries such as education, tourism or air transport. The author of this report could not find any study that provides insight into the implication of GATS for standard setting, certification and accreditation bodies per se. It would be useful to contract international trade law experts to study the implications of GATS for the conformity assessment industry. The findings would be relevant to standard setting and conformity assessment in agriculture.

PRIVATE STANDARDS IN THE UNITED STATES AND EUROPEAN UNION MARKETS FOR FRUIT AND VEGETABLES

Implications for developing countries

Over the past 20 years the number of standards and certification programmes for agricultural production has grown rapidly. Producers who want to export are confronted not only by a plethora of import regulations, but also within import countries by different niche markets for which specific requirements have to be fulfilled.

This report gives an overview of standards and certification programmes relevant for fruit and vegetable producers and exporters in developing countries with a focus on the markets of the United States of America and the European Union. In addition, it gives an overview of current analytical work on standards and trade, reviews major assistance programmes related to standards and provides recommendations for further research.

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