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Gender and Global Value Chains: Challenges of
Economic and Social Upgrading in Agri-Food

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Abstract

Supermarkets and agri-food companies increasingly dominate the production and retailing of food across the global south and north. They operate through global value chains (GVC) within which trade is coordinated by consumer-focused lead firms. This is generating jobs and incomes for workers and smallholders, a significant proportion female. Women contribute to enhancing productivity and quality in GVCs, but outcomes for improving their well-being appear to be mixed. The paper develops a gendered global value chain analysis as a frame for analysing processes of economic and social upgrading and downgrading in GVCs. It draws on case studies from African traditional and high value agro-exports to highlight three scenarios where: i. economic and partial social upgrading have gone together (floriculture); ii. upgrading and downgrading outcomes are mixed (horticulture); and iii. economic and social downgrading have gone together (cocoa). It considers the intersection of GVCs and gender embeddedness in shaping gender dynamics, and the role of private, civil society and public governance in promoting more gender equitable economic and social upgrading.

Keywords

Gender, Global Value Chains, Agri-food, Upgrading

1. Introduction

Global value chains are associated with changing gender dynamics of production and consumption. Global production is increasingly coordinated by lead firms through supply networks of producers, processors and agents across international borders. Supermarkets and agri-food companies are central to this process within the food sector. Women are also playing a critical role in the process of change. As consumers, women's purchasing power has increased following a rise in their participation in the labour force. As producers, women constitute a growing share of smallholders, and are often the majority of wage labourers in larger commercial farming and processing. Many developing countries are seeing a 'feminisation' of agriculture, as the sector becomes increasingly dependent on women as farmers and workers. Global value chain (GVC) analysis examines economic upgrading of producers moving to higher value activities, and social upgrading of workers through enhanced conditions and rights – or downgrading where the converse occurs. This paper examines the implications of economic and social upgrading and downgrading for women's participation in global value chains. It asks: (i) *what are the changing gendered dynamics of GVCs in agri-food and;* (ii) *what are the opportunities and challenges for the economic and social upgrading of women engaged in food value chains?*

The paper is divided into four further sections. The next section defines gender and global value chains, and provides a brief descriptive overview of women's participation in agri-food GVCs. Section three provides an analytical exploration of the concept of GVCs and economic and social upgrading, incorporating a gender perspective. Section four examines the gender dynamics of economic and social upgrading and downgrading in GVCs through comparative case studies from African agro-exports. It highlights three scenarios: (i) economic and partial social upgrading in Kenyan and Ugandan flowers; (ii) mixed outcomes of upgrading and downgrading in South African fruit; and (iii) economic and social downgrading in West African cocoa. Section five considers the governance implications and strategies to promote more gender equitable economic and social upgrading in GVCs.¹

2. Changing Role of Women in Agri-Food Value Chains

The advance of globalisation from the 1970s has led to significant changes in international trade. Previously trade largely took place between countries via arms-length intermediaries, but increasingly it takes place through global value chains. GVCs involve the outsourcing of production by buyers to independent suppliers across the world (largely from developing countries), with lead firms coordinating their global supply. Outsourcing labour intensive production allows lead firms to focus primarily on higher value activities such as design, branded marketing and retail at the consumer end of the value chain (Kaplinsky and Morris 2002). Lead firms apply strict conditions and standards to their suppliers. They are consumer focused and organise their sourcing on a 'just in time' basis in order to respond flexibly to changing market requirements. It is estimated that between 55-80% of world trade now passes through global value chains (OECD, WTO et al. 2013; UNCTAD 2013).

The early rise of GVCs was led by brand name companies, such as Nike and Gap, but increasingly large retailers and supermarkets have come to play an important role (Gereffi and Korzeniewicz 1994; Coe and Wrigley 2009). Supermarkets normally sell a full range of food items and many also sell non-food products such as clothes, personal care, household goods and services. In many countries they are displacing traditional 'high streets' as primary shopping venues (Coe and Wrigley 2009; Hamilton, Petrovic et al. 2011). Supermarkets now dominate food retail in many European and North American

¹ This paper forms part of research under a Leverhulme Major Fellowship. Feedback and comments are welcome. See: www.bwpi.manchester.ac.uk/research/researchprogrammes/workingoutofpoverty/.

countries.² For instance in the UK they are responsible for over 80% of food sales. However, they are also expanding rapidly in some countries within Asia, Latin America and Africa as incomes rise (Reardon, Timmer et al. 2003; Weatherspoon and Reardon 2003; Humphrey 2007).

The rise of GVCs has been associated with significant changes in patterns of consumption and production in the global economy and these have important gender implications. At the consumer end rising levels of female employment and income has seen a shift towards a ‘universal worker’ model based on two persons working (Stewart 2011). Women have less time for household activities, yet often remain largely responsible for cooking, childcare and related domestic tasks. They have therefore become more dependent on buying ready prepared food and time-saving consumer goods. Supermarket retailers have been quick to provide such goods through a ‘one stop’ shopping format. A similar but more uneven trend is also taking place in developing countries, where female employment has risen facilitating increased consumer purchasing power of women (GoldmanSachs 2009; WorldBank 2012). Women remain largely responsible for a significant proportion of consumer purchases.³ Their buying decisions are an important target for the promotion strategies of retailers and supermarkets, and in marketing the consumer is normally referred to as ‘she’ (Caterall and Maclaran 2002; Beetles and Harris 2005).

The outsourcing of production from lead firms in the global North to suppliers in the global South has contributed to rising levels of female employment in manufacturing, agriculture and services linked to GVCs in developing countries. Exact data on GVC employment is difficult to obtain. However, as an example, it was estimated there are over 25,465,000 apparel workers in the top 27 apparel exporting countries, with a ratio of women varying between 60-80% in the majority of countries (ILO personal communication 2014). Data for agriculture is even more difficult to obtain as the number of women working as smallholders or unpaid family labour are often formally unrecognised.⁴ Even if they are the main farmer, women often don’t have independent ownership of land or access to credit and face challenges selling into value chains in their own right (Barrientos 2014). Yet it is estimated that in many parts of the world – particularly sub Saharan Africa (SSA) and South Asia – women are responsible for the majority of production. In Uganda, broadly illustrative of SSA, 75% of agricultural producers are estimated to be women (World Bank 2009).

Integration into global value chains provides new opportunities for tens of millions of women, without previous access to international trade, to earn independent incomes or wages. However, there is debate over the extent to which working in exports benefits women workers. Some argue that women are severely exploited, enduring poor employment conditions, insecurity, low pay and can face issues such as sexual harassment (Elson and Pearson 1981; Dunaway 2014). Others argue that, despite problems, such work also brings benefits to women and can contribute to their economic and social empowerment (Lim 1990; Kabeer 2000; Maertens and Swinnen 2012). However, a nuanced assessment requires a deeper gender analysis of GVCs and the changing roles of women and men in global production, distribution and consumption. The next section develops a gender analysis of GVCs and outlines the concepts of economic and social upgrading and downgrading providing a framework for further empirical exploration of the processes.

² Retail growth is reflected in the position of Walmart as the world’s second largest company with an annual revenue of US\$ 469.2 billion (Fortune Global 500, <http://money.cnn.com/magazines/fortune/global500/index.html> Accessed March 2014).

³ Walmart estimates that over 70% of its purchases are made by women.

⁴ A critical area that needs improved mainstreaming in the regular data collection system is women’s and men’s work activities in agriculture. ‘Population censuses and labour force surveys largely overlook and thus under-report women’s work in agriculture since it is usually unpaid and often includes activities such as food processing and providing water and fuel that are easily considered part of housework.’ (UN 2005: 62).

3. Gender and Global Value Chains – Analytical Perspectives

Global value chain analysis traces the linkages between firms at varying stages of the supply of goods. A value chain 'describes the full range of activities that are required to bring a product from its conception, through its design, its sourced raw materials and intermediate inputs, its marketing, its distribution and its support to the final consumer' (Kaplinsky 1998). Importantly GVC analysis examines the *relations* between firms engaged in the separate nodes of a chain. 'Gender' is also a *relational* concept that analyses socially ascribed relations between men and women, including economic relations, rather than focusing on biologically determined differences. Given both women and men play critical roles in value chains, a gender analysis helps to explore the ways in which commercial and gender relations inter-sect. In order to unpack this further, this section first examines key concepts that inform GVC analysis from a gender perspective. Next we look at the concepts of economic and social upgrading and downgrading from a gender perspective, as a framework for considering the opportunities and challenges for women's engagement in GVCs. Finally, we explore the notion of 'societal embeddedness' and the intersection between the commercial and gender dimensions of production.

Global Value Chains from a gender perspective

In GVC analysis, governance by lead firms plays a key role in understanding how inter-firm relations are mediated. Relations between firms within value chains were initially defined as producer-driven or buyer-driven (Gereffi 1994), but later more nuanced analysis identified different forms of coordination, including hierarchy, captive, modular, relational and arms-length (Gereffi, Humphrey et al. 2005). Chain governance involves lead firms: (i) coordinating of activities of suppliers; and (ii) imposing standards to which all suppliers have to conform (Humphrey and Schmitz 2002; Henson and Humphrey 2010). However, governance takes place in a context of asymmetry of commercial power within the chain between lead firms, higher tier suppliers and lower tier sub-contractors. Lead firms are able to use their dominant position to exert control through governance of suppliers further down the chain (Kaplinsky and Morris 2002). In the GVC literature, governance is mainly analysed in terms of power of firms at different nodes of the value chain to control or govern upgrading activities and the terms on which different firms participate within the chain. However, by extension, we can include the differential power relations between women and men reflecting wider gender inequalities in society that can affect the gender profiles of firms at any GVC node (Barrientos 2001; Bolwig et al. 2010; Mayoux and Mackie 2007; KIT 2012; Staritz and Reis 2013). This facilitates examination of women's concentration in particular types of firm or activities across different nodes of value chains, and to assess the gender implications of inter-firm governance.

GVC analysis has also enquired into how the dominant position of lead firms facilitates their acquisition of 'economic rents'. In vertically integrated manufacture-focused GVCs production is increasingly fragmented across different suppliers and countries, in additive agriculture-focused GVCs productive activities are more concentrated in specific locations (Kaplinsky and Morris 2014 forthcoming). Lead firms can determine a division of labour along the supply chain allowing them to focus on higher value activities such as design, branding and marketing, whilst they outsource lower value activities to diversified suppliers. This facilitates capture by lead firms of an additional economic rent over and above normal competitive profits (Kaplinsky 2000). Value capture is also enhanced at the consumer end of value chains by selling higher quality goods at competitive price points geared to different segments of the consumer market.

Unpacking this further, conventional economic analysis focuses on labour as a factor of production, and sociological analysis on the social agency of workers. As a factor of production - labour is engaged in value creation at firm level, and as social agents workers have welfare needs and rights that are recognised and enforced through national regulation and international conventions. Gender analysis further differentiates between productive paid work undertaken within a commercial

workplace largely by men and reproductive unpaid work undertaken within the private confines of the household largely by women (Folbre 1994). Gender analysis unpacks the societally embedded gendered institutions that shape an accepted division of labour whereby women's work is undervalued, and protection of women's welfare needs and rights premised on their subordinate role (Elson 1999).

From a GVC perspective, these underpin the role of labour, but rather than analyse them within the context of a single firm or country, we need to consider the interlinked roles of multiple commercial, social and public actors along value chains that cut across firms and national jurisdictions. In this context, value creation needs to be disaggregated to identify value capture and value distribution, which can take place at separate nodes along the chain from the point of production (Henderson, Dicken et al. 2002; Kaplinsky and Morris 2002). Workers' welfare and rights are not only affected by national jurisdiction but also by governance strategies of global buyers that include codes of labour practice and related social standards. Workers' agency can further be influenced by advocacy and campaigns of global unions and international NGOs focused on global buyers outside the country or firm where production is located (Waterman and Wills 2001).

Extending this to incorporate gender, different value chain nodes are also characterised by a gender division of labour. Women are often preferred workers in certain value chain nodes to carry out specific tasks and types of production because of their perceived dexterity and skills (Elson and Pearson 1981) and can make an important contribution to quality enhancement. Economic rents can also be enhanced by casting particular skills or functions as 'feminine' in socio-economic contexts where unequal pay prevails, allowing recruitment of women at lower labour costs or with higher productivity than men (Barrientos 2001; Mayoux and Mackie 2008). Gender inequalities that ascribe lower value to feminine tasks thus means women's contribution to value creation is insufficiently remunerated, facilitating value capture further along the global value chain by agents and lead buyers often far removed from the workplace.

An important gender dimension of GVCs is the tension between quality and price. Unlike traditional markets, where in theory prices adjust to clear goods; consumer-focused buyers in GVCs strive to attain different quality levels at specific price-points depending on the differentiated segment of the consumer market targeted. In all segments quality matters and lead firms impose strict standards to achieve this, even in the high-volume low-price end of the market. In higher market niches a wider range of quality attributes matter (such as social, ethical and environmental criteria) (Ponte and Gibbon 2005). Women often play a key role at the intersection of quality and price in labour intensive industries given their socially acquired skills make an important contribution to enhancing quality and productivity, but at lower labour cost (Elson and Pearson 1981; Collins 2003). This tension has important implications for the gender dimensions of economic and social upgrading and downgrading, and can play out differently across sectors and countries which we examine in the next section.

Gendered Economic and Social Upgrading

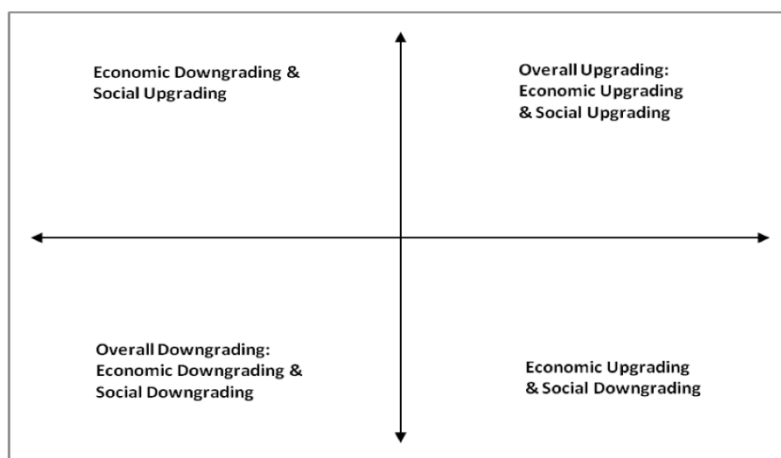
The concept of 'upgrading' has long played an important role in GVC analysis. In the early literature the focus was on industrial upgrading of firms (Gereffi, Humphrey et al. 2001; Humphrey and Schmitz 2002; Gereffi, Humphrey et al. 2005). The concept has later been broadened to economic upgrading to clearly cover agriculture and services as well as manufacture, and extended to incorporate the social upgrading of workers and small-scale producers (Barrientos, Gereffi et al. 2011). At a generic level, economic upgrading can be defined as moving to higher value activities and social upgrading as improved working conditions and rights in global value chains. Downgrading is the converse of these processes. These concepts have been adapted to the macro and meso levels to take account of the different scales of GVCs and facilitate empirical analysis. Here we first explore the macro and then the meso analysis of economic and social upgrading.

Upgrading has been examined at a macro level by focusing on individual sectors and countries using what is described as a parsimonious approach (Bernhardt and Milberg 2011). This approach is

based on narrowly defined measures in part to facilitate ease of analysis of upgrading, but also to take account of the substantial gaps in macro-data availability needed to measure GVC participation, especially for social indicators.⁵ The parsimonious approach defines economic upgrading at a national level in terms of: (i) change in world export market share, an indicator of export competitiveness; and (ii) change in export unit values, a measure of product upgrading. Social upgrading is defined as: (i) % change in employment and (ii) % change in real wages in the same selected sectors and countries. To assess overall upgrading and downgrading (economic and social), Bernhardt and Milberg (2011) combined the two variables for each measure of upgrading into a single indicator, with equal weight assigned to each variable. This allowed them to plot the results for different countries by sector in a two-by-two matrix, as depicted in Figure 1. The upper right hand quadrant displays economic and social upgrading, the bottom left hand quadrant displays economic and social downgrading, and the other two quadrants cases with mixed outcomes. They undertook comparative analysis of economic and social upgrading subject to available data availability for selected countries in apparel, horticulture, tourism and mobile phones (for their detailed findings see Bernhardt and Milberg 2011).

Their macro level research indicates that economic upgrading *can* but does *not necessarily* lead to social upgrading and outcomes are often mixed. In some cases economic and social downgrading can result either separately or together (Bernhardt and Milberg 2011; Milberg and Winkler 2013). They found that growth in export market share is often associated with declining unit export values. Likewise, for social upgrading, they found that overall trends in employment growth were often associated with lower real wages. This indicates that expanding participation in GVCs *can* but does *not necessarily* result in higher paying jobs or, by extension, more bargaining power or overall improvement in workers’ well-being.

Figure 1: Economic and Social Upgrading Matrix



Source: Bernhardt and Milberg, 2011

From a gender perspective, economic and social upgrading based on a macro approach needs to be refined to take account of the gender ratio of employment and gender pay gaps in relation to income. This helps to assess whether sectors with a higher concentration of female employment experiences upgrading or downgrading relative to others and also assess whether economic upgrading leads to an increase or decrease in female employment. However, macro-data availability limits the analysis to formal urban employment recorded in labour market statistics, which often fails to capture much female employment in GVCs. Much female employment is informal and casual, and is not formally

⁵ These measures were selected in part based on available data, given limited data availability on GVCs at that time. This has since been addressed by the OECD-WTO Trade in Value Added Initiative (TiVA) see: <http://www.oecd.org/industry/ind/measuringtradeinvalue-addedanoecd-wtojointinitiative.htm>

recorded or in agriculture is unavailable (Chen, Vanek et al. 2004). Unpacking the gender dimension thus requires more detailed investigation through case studies that investigate lower tiers of supply, which macro data is unable to facilitate.

At a meso level, case study research complements a macro level approach by further unpacking the complex links between economic and social upgrading in GVCs, particularly the gender dimension. Here the definitions of upgrading have been developed further. Combining the different approaches, *economic upgrading* is defined as firms moving from lower to higher value activities. This can be done through process upgrading (producing the same product in different ways); product upgrading (producing new outputs); functional upgrading (undertaking new activities within the chain); and chain upgrading (moving to new higher value chains) (Humphrey and Schmitz 2002; Gereffi et al. 2005). *Social upgrading* is defined as providing better incomes and conditions for workers (both waged and small-scale). This has been divided into improvements in outputs standards that are easily measurable (e.g. via social auditing); and improvements in enabling rights such as freedom of association and no discrimination (that are less tangible or easily measured) (Elliott and Freeman 2003; Barrientos, Gereffi et al. 2011). From a gender perspective these definitions can be further refined to include gender disaggregated analysis of upgrading (with downgrading the reverse of each):

- Economic upgrading needs to ensure value creation facilitates value capture that is equitably distributed to female and male entrepreneurs and workers along value chains. In cases where women's contribution to value creation and value capture is insufficiently or inequitably remunerated, facilitating value distribution further along the chain, this constitutes inequitable economic upgrading. For example, if the application of standards (such as certification), generates more work for women working on farms or factories, but they receive little or no additional remuneration; and the higher price from certification is captured by other commercial actors, this constitutes gender inequitable economic upgrading.
- Social upgrading can be refined to link women and men's participation in GVCs with respect and protection of gender equitable conditions and rights. This involves formal equality at every level of upgrading whereby improvements in conditions and rights benefit women on an equal basis to men. It also involves gender equitable *opportunities* for women to be able to upgrade to higher levels at all value chain nodes. For example, gender equitable upgrading is not realised where women are unable to escape from disproportionate concentration in casual work with poorer conditions and rights. Gender equitable upgrading requires respect and protection by all relevant actors (private, public and social) along the global value chain, drawing on the UN Guiding Principles on Business (Ruggie 2013).

This helps to assess the opportunities and constraints for women relative to men if and when upgrading takes place, and conversely to consider whether gender inequities constrain upgrading.

We need to modify the analysis slightly when applying the concepts of economic and social upgrading and downgrading to small scale producers rather than larger producers employing wage labour. In small-scale production, the farm household is often both the enterprise and source of labour, with the division between paid commercial and unpaid subsistence blurred. When engaging in GVCs risk can also be a major concern (Bolwig et al. 2010). In many developing countries embedded norms and sometimes legislation concentrate recognised land ownership in the hands of male farmers, whilst their female spouse and family members work as unpaid family labour. This leads to women's actual role in farming remaining hidden, even where they undertake much of the work. Women often lack collateral provided by land tenure to access finance and are less able to secure contracts as farm suppliers (Quisumbing, Payongayong et al. 2004). When a male farmer dies, their female spouse often loses access to land, heightening their insecurity and dependence on other male relatives. From a gender perspective we can define economic upgrading in terms of greater recognition of women's role in production when moving to higher value activities through process, product and functional upgrading. Social upgrading is more equitable livelihoods (incomes and security) for both female and male farmers and household members. In this context, upgrading for women can be achieved by more

equitable participation as a chain actor, engaging in and being remunerated for higher value added activities, forming partnerships and co-ownership (KIT 2012).

Gender Embeddedness

The above gender exploration of key concepts within GVC analysis raises the issue of the embeddedness of commercial relations within gendered societal relations. The role of institutional embeddedness was raised in Gereffi's early analysis of global commodity chains (Gereffi 1994; Bair 2008). Subsequent GVC analysis tended to focus on exploration of inter-firm relations as discussed above. The related literature on Global Production Networks (GPN) placed greater emphasis on exploring institutional, societal and power relations within which global sourcing 'touches down' across different territorial contexts (Dicken, Kelly et al. 2001; Henderson, Dicken et al. 2002). The importance of analysing the intersection between commercial dynamics and socially embedded gender relations has been identified by some contributors to GVC/GPN analysis (Barrientos, Dolan et al. 2003; Collins 2003; Bair 2008; Barrientos 2014; Dunaway 2014).

As discussed above, the gender division of labour in most societies casts women as primarily responsible for reproductive and care work and men for productive paid work. Where women enter the workforce they often do so in jobs associated with these activities, which are ascribed a lower value than those normally undertaken by men. Gender inequities between men and women are reflected in significant gender gaps in terms of income, access to opportunities and assets. However, gender relations are not static and can change over time. The growth of outsourcing by the global North from the South has fuelled value chain expansion across developing countries, bringing new commercial dynamics that intersect with more traditional gender relations of production and consumption. This can lead to changes in the gender division of labour since more and more women are drawn into work from which they were previously excluded. It can also reinforce gender inequities where that work is low grade, insecure and poorly remunerated on the socially ascribed grounds that women's work is less valuable than men's.

Socially embedded gender relations therefore shape women's engagement in global value chains, and in turn GVC dynamics can influence processes of change in gender relations. GVCs intersect with pre-existing social and cultural norms, and can replicate gender inequities in terms of women's unequal pay and poor remuneration for their skills. The interaction between gendered relations and GVC dynamics creates opportunities for women to earn independent incomes and also creates constraints on their access to value chains and the extent to which they are able to capture value from their contribution. The concepts of economic and social upgrading and downgrading provide a framework that links the commercial and societal dimensions of GVCs and facilitates gendered exploration of the pros and cons of value chain access for women and men as entrepreneurs and workers. This helps to throw light on the complex ways GVCs can on the one hand promote the economic and social empowerment of women, whilst on the other hand constraining that empowerment.

1. Gendered Processes of Economic and Social Upgrading and Downgrading

The concepts of economic and social upgrading provide a framework for analysing the outcomes for producers and workers of value chain integration. However, empirical studies of outcomes at both macro and meso levels have shown no linear relation between economic and social upgrading or downgrading. Rather there can be mixed outcomes which can vary across contexts and sectors. In this section we examine different cases that highlight a variety of outcomes in order to further explore the conditions under which gender equitable economic and social upgrading can be promoted.

At a macro level, a number of studies have examined the feminisation of employment as countries have expanded their manufacturing, agricultural and service sectors to engage in international trade

(Van Staveren, Elson et al. 2007). However, detailed studies of the gender dynamics of economic and social upgrading in GVCs are limited. Tejani and Milberg (cited in Milberg and Winkler 2013: 274-8) have examined the effect of industrial upgrading in GVCs on the feminisation of employment in various middle income countries between 1985-2006. They found mixed outcomes, with industrial upgrading stimulating greater feminisation of employment in some countries and defeminisation in others (particularly East Asian and Pacific countries). They were unable to account for differences through gendered skills gaps or wage differentials, and concluded that gender norms and stereotypes play an important role. This indicates that the embeddedness of commercial GVCs in gender relations can differ across countries thus affecting outcomes experienced by women and men in different socio-economic ways.

At a meso level, case studies further help to unpack diverse interactions in order to better understand the complex gendered processes that lead to either economic and social upgrading or downgrading, or to mixed outcomes for firms and workers (Christian, Evers et al. 2013). Here we examine three scenarios drawing on research in African agro-exports:

- *Economic upgrading and partial social upgrading* – drawing on case studies from Kenyan and Ugandan flowers where economic upgrading by larger flower export farms and civil society campaigns have contributed to some improvements in employment conditions and strategies to address gender discrimination for a largely female workforce.
- *Mixed economic and social upgrading and downgrading* - drawing on a case study of South African fruit, where economic upgrading of large fruit export producers is associated with mixed outcomes (positive and negative) experienced by different groups of permanent and casual workers both female and male, with tensions arising from the need for more skilled but casualised workers (often female).
- *Economic downgrading and social downgrading* - drawing on a case study of West African cocoa, often depicted as a ‘male crop’, where a secular decline in cocoa prices and lack of support or community investment over many years has contributed to a long-term deterioration in incomes and livelihoods. Women in this case play an often hidden and poorly remunerated role in sustaining cocoa.

The three cases are not representative of all GVCs nor are they representative of the relevant agricultural sectors in each country; rather they demonstrate how the gendered dynamics of upgrading and downgrading within GVCs can play out differently across diverse contexts and sectors.

Economic Upgrading and Social Upgrading - Kenyan and Ugandan Floriculture

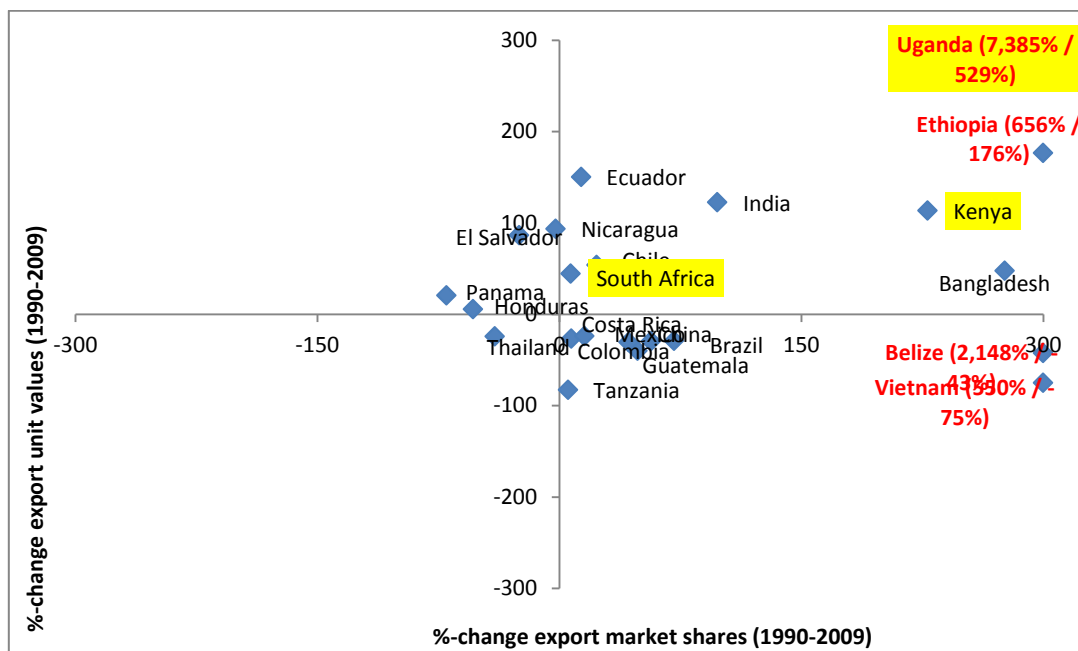
Both Kenyan and Ugandan floriculture are interesting examples of positive economic and social outcomes that can occur within global value chains. Kenya has been successful in the export of cut flowers, and Uganda has become successful as an exporter of cuttings rather than cut flowers. Women form a significant percentage of workers at production level in both countries and have seen some positive improvements in their employment conditions and rights. Here we examine the gendered processes of economic and social upgrading in more detail.

Economic upgrading in the Kenyan and Ugandan flower sectors is supported by the macro level analysis carried out by Bernhardt and Milberg (2011) using the four quadrants as a framework discussed above. This is shown in Figure 2 covering the period 1990-2009, although it should be cautioned that this includes both floriculture and horticulture. It can be seen that Uganda experienced the greatest rate of economic upgrading measured by the rise in share of export volumes and earnings, but it did so from a much lower base than Kenya. Kenya also experienced economic upgrading at a slower rate of increase in export volumes and earnings, but from a higher base. Of the countries examined by Bernhardt and Milberg only Ethiopia experienced a similar rate of economic upgrading

to Uganda and Kenya. As discussed above, there was insufficient data available to examine social upgrading in horticulture and floriculture at a macro level.

In Kenya growth in the volume and value of flower exports led to it moving from 3.6 percent to 6.4 percent of world exports between 2001 and 2012, with flower exports valued at US\$ 597,716 in the latter year (ITC 2013). Kenya now ranks as the fourth largest world flower exporter after the Netherlands (50 percent), Columbia (14 percent) and Ecuador (8 percent). However, these figures do not fully reveal meso-level economic upgrading within the value chain. Kenya has engaged in product upgrading by moving away from the export of lower value to higher value stems and bouquets. The quantity sold direct to EU supermarkets (particularly bouquets) rather than through the Dutch flower auctions rose to 30% from the mid 1990s and stabilized at around a quarter of EU exports by 2011 (Riisgaard and Gibbon 2014). Kenyan flower companies have also process upgraded through increasing compliance with international standards. An estimated 93 of 177 flower exporting farms are certified to a private social or environmental standard while 73 to both standards. The 49 large agricultural farms certified to the Kenyan Flower Council's own standard are estimated to account for 59% of the total area under large-scale agricultural production in the country (Gibbon and Riisgaard 2014).

Uganda has a much smaller floriculture sector, and has taken a different route, shifting away from cut flowers (in which it struggled to compete with Kenya) to the export of cuttings. This has provided a different approach to product upgrading and helped to enhance export volumes and earnings, albeit from a much lower base than Kenya. Uganda increased its export of cuttings from 0.2% to 0.6% of the world market between 2001 and 2012, selling US\$ 52,364 in the latter year. It now ranks as the 16th largest cuttings exporter; the Netherlands is the largest with 48% of the world total (ITC 2013). In the move from flowers to cuttings, some producers experienced economic downgrading (mainly African and Asian-owned exporters focused on flowers). Those that upgraded were primarily cuttings producers in vertically integrated operations of European managed and largely Dutch owned multi-national propagators (MNPs). An important driver of economic upgrading was their close ties with the lead firms, which provided direct investment, technical support and secure markets for the cuttings which go to the next stage of the value chain (such as the Netherlands) for final cultivation. MNPs also facilitated process upgrading enabling producers to meet rising environmental and social flower industry standards (Evers, Amoding et al. 2014).

Figure 2 – Economic Upgrading in Horticulture 1990-2009 (Selected Countries)

Source: Bernhardt and Milberg 2011

Both Kenyan and Ugandan flowers have high levels of female employment. As shown in Table 1, an estimated 75 percent of the 70-90,000 Kenyan flower workers, and 65-75 percent of the 7,000 Ugandan flower workers are women. In both countries the sectors provide incomes for a much higher number of dependents and indirect workers. However, the profile of the horticulture and floriculture value chain is highly gendered. As depicted in Figure 3 women are concentrated at production level, particularly in packhouses. They are employed here for their dexterity and skill in handling sensitive flowers and fresh produce that are easily damaged. Women packhouse workers are often paid more than lower level field and greenhouse workers. Packhouse workers often have better levels of educational attainment, and on many farms receive additional workforce training (Fernandez-Stark, Bamber et al. 2011; Gibbon and Riisgaard 2014). As Figure 3 depicts much of the supervision and management in the sector is male, as is the ownership profile. Economic upgrading has therefore benefited from the skills women bring to produce high quality produce and has benefitted women in terms of the provision of more skilled female employment.⁶

In relation to social upgrading, both Kenya and Uganda floriculture have seen improvements over the last decade. However, it is important to note that in the 2000s both countries were subject to civil society and trade union campaigns over poor labour conditions (Riisgaard and Gibbon 2014; Nelson, Tallontire et al. Forthcoming). These campaigns highlighted poor conditions experienced by the largely female labour force experienced including high levels of job insecurity, poor remuneration, health and safety hazards, and in some cases sexual harassment by male supervisors. Working conditions were therefore at a low level.

Trade union and NGO campaigns led to the introduction of codes of labour practice by supermarket buyers, leading flower companies, international flower industry bodies and actors in Kenya and Uganda (including Kenya Flower Council standard, MPS, Fairtrade and ETI Base Code). Most codes are based on ILO Core Conventions include the principle of no discrimination. Campaigns involving women-focused NGOs led to the setting up of gender committees on some flower farms

⁶ For example the number of flower workers in Kenya increased from an estimated 40-70,000 in 2003 (Smith et. al. 2004) to 70-90,000 workers in 2014.

tasked with addressing issues such as sexual harassment (Oxfam/IPL 2013; Evers, Opondo et al. 2014). Kenya also saw improvements in labour legislation that benefitted flower workers.

Flower companies that had economically upgraded within the value chain subsequently made improvements in the terms and conditions of employment. Workers in both Kenya and Uganda report better health and safety conditions and less on-farm sexual harassment (Oxfam/IPL 2013; Evers et. al. 2014).⁷ Another change has been in relation to job security. In Kenya, for example, research on flower export farms in 2002 found high levels of job insecurity overall across the flower industry, with approximately 35 percent of workers on permanent contracts, and 65 percent on temporary or casual contracts (Dolan and Sorby 2003; Smith, Auret et al. 2003). However, this ratio varied by farm depending in part on their value chain position. For example in the same year a study of 7 progressive farms at higher tiers of the value chain found a reverse ratio of permanent to casual workers (Dolan, Opondo et al. 2004). A decade later, a separate study of 11 flower export farms, also at upper tiers of the value chain, found an estimated 80 percent on permanent contracts and 20 percent on temporary or casual contracts (Gibbon and Riisgaard 2014). These authors argue stabilisation of employment occurred as a result of stabilisation of Kenyan flower exports to Europe and innovations in production, human resource and management practices (Riisgaard and Gibbon 2014).⁸ Permanent workers are more likely to be in unions which negotiate with management and address problems on their behalf.

Despite advances, some problems persist. With rising food and consumer prices, workers' incomes are insufficient to constitute a living wage and this continues to be a major issue for workers (Oxfam/IPL 2013; Evers, Amoding et al. 2014). Riisgaard and Gibbon (2014) found in their study of 11 upper-tier flower farms that whilst there had been significant improvements in the 'social wage' (holiday, maternity and sick leave, pensions and insurance) between 2002-11, in real terms the monetary wage had declined absolutely and relative to the national minimum agricultural wage. Economic upgrading thus appears to enhance social conditions more readily than real incomes (or value capture) of workers, hence social upgrading is only partial.

In sum, a number of drivers of upgrading have been identified in the flower sector. These can be divided into three broad categories:

- Economic upgrading can be a driver of social upgrading, where the demand for high quality products necessitates a more skilled and stable workforce whose retention required better employment conditions. Social upgrading is also facilitated by changes in management practices and professionalisation of human resource procedures.
- Even where workers benefit from social upgrading in the form of improved health and safety and labour rights, it is less likely to translate into better remuneration that sufficiently rewards women equitably for their contribution to value creation and value capture particularly where they are paid less than a living wage.
- Civil society, private and public governance: Many researchers emphasise the role played by civil society and trade union campaigns that pressurised buyers to implement social and environmental standards in the flower sector and set up gender committees. Both countries saw improvements in labour legislation that benefitted flower workers.

⁷ Sexual harassment, which is deeply embedded social issue, is reported to have reduced on site but continues at community level.

⁸ Some civil society actors argue that more stable employment is found across the flower industry, but accurate industry data is unavailable (see Riisgaard and Gibbon Footnote 9). It is possible that more stable employment is only associated with selected farms that have economically upgraded in the value chain.

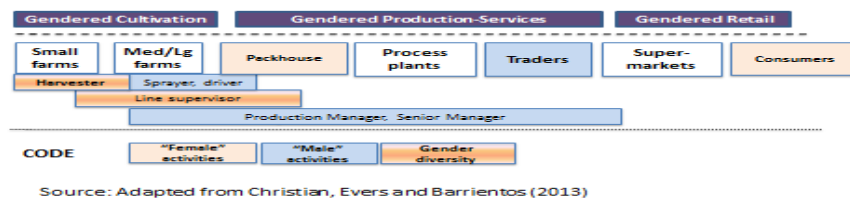
Table 1. Estimated Number of Workers and Smallholders in Export Horticulture

Country/Product	Smallholders	Wage Workers	Estimates of female labour force	Indirect/Dependents
South Africa Fruit (a)	n/a	400,000***	53%	2,000,000
Kenya Flowers & FFV (b)	220,000*	70 -90,000**	75%	2,000,000
Uganda (c)	n/a/	7,000	65-75%	35,000

Sources:

- Citrus Growers' Association (CGA), Hortgro (deciduous fruit), South African Table Grape Industry (SATI - table grapes) and South African Sub-tropical Growers' Association cited in <http://www.fruitsa-ethical.org.za/who-is-fruit-south-africa.php>
- Oxfam/IPL (2013); ETI 2010: <http://www.ethicaltrade.org/in-action/projects/kenya-flower-project>; and Kenya Flower Council (2014): <http://www.kenyaflowercouncil.org/index.php/89-the-flower-industry-in-kenya>
- Industry estimates cited in Evers et. al. 2014.

Note: *Fresh vegetables for export (2009) ** Mainly Flowers for export (2010) *** Fruit Only – deciduous, citrus, grapes, sub-tropical (2011)

Figure 3 – Simplified Gender Profile of Horticulture and Floriculture Value Chain

Mixed Upgrading and Downgrading Outcomes - South African Fruit

Mixed outcomes have been found in relation to economic and social upgrading and downgrading in the example of South African fruit. Some fruit producers have clearly benefited from economic upgrading within supermarket value chains but increasing concentration within the sector reflects downgrading of other producers. Social upgrading has taken place for a core group of permanent and regular workers, but parallel increased casualization of labour means many workers have experienced social downgrading. We will examine the gender process involved in these mixed outcomes in more detail.

At a macro level, South African fruit has experienced overall economic upgrading. As shown in Figure 2 above, it lies in the upper right hand quadrant, indicating a proportionate increase in both its export share and unit value of exports between 1990 and 2009 (Bernhardt and Milberg 2011). However, its rate of economic upgrading has been more muted than that experienced in Kenyan and Ugandan floriculture. South Africa's fruit export sector has a much longer history, but expanded significantly post-apartheid, especially with disbanding of the fruit export marketing boards. Between the 1980s and 2007 horticultural production increased from 18 percent to 26 percent of total agricultural output in South Africa. Over 50 percent of fruit is exported and have long been supplied to

supermarket value chains, primarily based in Europe. However, recently supply has also been growing to supermarkets within South Africa. It is estimated that approximately 400,000 workers are employed in the production of all fruit categories (deciduous, citrus and tropical), with just over half women (see Table 1). Over 2 million people are indirectly employed or dependent on workers in the sector (Barrientos and Visser 2012).

At a meso level, producers have been under pressure to process upgrade in order to meet increasingly stringent standards applied by European supermarkets and to a lesser extent, South African supermarkets.⁹ Some producers have also functionally upgraded by engaging in higher value activities within supermarket value chains, including installing sophisticated packhouses, cool chain, distribution and marketing facilities facilitating direct delivery through to the distribution centres of overseas and domestic supermarkets (Barrientos and Visser 2012). However, not all producers have been able to benefit from economic upgrading. Growers have had to meet rising supermarket standards largely at their own cost, in a context of high interest rates on loans to finance the necessary investment and rising input costs (labour, fertilizers, pesticides and packing). Many farmers have been unable to remain competitive, and the takeover of smaller producers by larger producers has led to an increased concentration of a fewer large growers (Barrientos and Visser 2012). The net effect is overall economic upgrading of the sector benefiting a smaller group of predominantly male producers in a context of rising quality standards and increasing costs.

Social upgrading and downgrading have similarly been affected by tensions between the need to meet rising supermarket quality standards and rising input costs, affecting men and women differently. An important gender dimension has been the increasing importance of packhouses in attaining quality standards. Here a significant proportion of employment is female reflecting norms regarding women's dexterity and skills in handling delicate fruit. Female packhouse workers have long enjoyed better pay and conditions than many male farm workers. However, the rising complexity of standards and need to meet differential requirements of multiple supermarkets (global and national) has increased demand for a more skilled packhouse labour force (Fernandez Stark 2011; Barrientos and Visser 2012). Recruitment and retention of skilled female workers, combined with supermarket social standards covering employment, have contributed to better job security, remuneration and conditions (including unionisation) for these workers. This is a clear example of social upgrading for a large female segment of the labour force.

However, tensions between meeting quality standards and rising costs have also led to a counter trend towards the increasing casualization of other farm workers in a situation where labour accounts for an increasing share of farm level costs. Alongside social upgrading of some workers, there has been an increasing process of labour casualization affecting others. In grapes, for example, permanent workers fell from 28 percent to 20 percent of the total table grape workforce between 2007 and 2011 (SATI 2011). This shift results from increasing pressure to reduce labour costs (that have risen from 47 percent to 52 percent of farmers' costs in the same period). Seasonal labour is not only cheaper (incurring lower wage and non-wage costs), but also allows farmers to cope with increasing commercial insecurity and seasonal variations. However, at the same time farmers have sought more skilled casual labour to help meet standards and raise efficiency. This has led to greater recruitment of migrant labour, including from outside South Africa, even where there is local rural unemployment (Barrientos and Visser 2012). Casual and migrant workers are often recruited through labour brokers or intermediaries with few rights, often experiencing the worst labour conditions (du Toit and Ally 2001; Barrientos and Kritzing 2004). Data on the gender profile of this shifting labour force is unavailable but anecdotal information suggests both men and women are being affected. A shift from permanent work with better terms and conditions and regular income to more insecure seasonal employment represents social downgrading for workers.

⁹ Standards include: GlobalGAP, HACCP, supermarket codes of labour practice based on the Ethical Trading Initiative base code of labour practice.

Social upgrading and downgrading within South African fruit needs to be analysed in a context where labour is deeply embedded in racial and gender relations. Under apartheid, farm ownership was largely acquired by white male farmers, who continue to predominate in the fruit export sector. In the absence of agricultural labour legislation, a paternalist culture prevailed in which the farm owner oversaw the welfare of his workers. The norm in the Cape was to employ coloured men as permanent workers on farms on condition that their female spouse or family members would be available for seasonal work when needed usually on much lower pay (Kritzinger and Vorster 1996). This was complemented by use of a seasonal migrant labour force of largely black African workers both male and female recruited from designated 'homelands'. The end of apartheid led to the introduction of legislation covering labour rights and gender equity aimed at improving the pay and conditions of workers. However, it also contributed to a process of retrenchment of large numbers of on-farm permanent workers and segmentation between a smaller group of regular workers with better conditions and a more insecure casual workforce. Men and women are found in both groups of permanent and casual work (reflected in women constituting 53 percent of the total labour force as shown in Table 1), but women are now employed in their own right in both groups, reflecting increased independence. Embeddedness has therefore shaped the gendered, social and institutional context in which social upgrading and downgrading have taken place, with both public governance (legislation) and supermarket pressures playing a role in shaping changing gender dynamics as well as upgrading and downgrading.

In sum, a number of drivers of social upgrading and downgrading have been identified in the South African fruit sector which can be divided into three broad categories:

- Economic upgrading and downgrading are helping to drive mixed outcomes for workers, in particular the tension between enhancing quality (leading to social upgrading), whilst driving down labour cost (leading to casualisation despite the search for more skilled casual workers). The fruit sector is also inherently seasonal, underpinning the use of temporary workers. Gendered tasks means that women are both winners relative to men (particularly as packhouse workers and some as permanent farm workers) and losers along with men as increasingly casualised workers.
- Even where economic upgrading occurs, commercial and cost pressures within the value chain are also driving casualisation for some workers as a means of reducing costs and increasing flexibility. Hence economic upgrading is associated with both social upgrading for some workers and downgrading for others.
- Public governance (legislation) has also played an important role in transforming the fruit sector, both through trade liberalisation stimulating export expansion in the 1990s and the extension of legislation covering labour rights and gender equity affecting agriculture. The shift from paternalist to more modern labour relations also contributed to retrenchment of coloured permanent workers and a long term process of casualization, affecting both men and women. Private governance (supermarket codes of labour practice) and civil society governance (trade unions and NGOs) have been introduced but to date have had limited effects in improving conditions for casualised workers. This could change following serious labour unrest in the fruit sector in 2012/13.¹⁰

Economic and Social Downgrading - West African Cocoa

Economic and social downgrading have been a feature of some traditional agricultural commodities over a long period – this is exemplified by the cocoa sector. Whilst there has been economic upgrading in the processing and manufacturing segments of the cocoa-chocolate value chain, this has been

¹⁰ Tensions generated by casualization on low pay tipped over in 2012 to significant labour unrest amongst workers, who demanded an increase in the minimum agricultural wage and better representation in the fruit sector.

accompanied by economic and social downgrading in the cocoa production segment. This is reflected in declining cocoa productivity, low incomes and poor livelihoods of cocoa households and communities. In a growing chocolate market, economic and social downgrading is now having serious repercussions for chocolate companies worried about the future resilience of their supply chains. This has led to a recent surge in private sector initiatives to support the upgrading of cocoa farmers. Cocoa is perceived as a male crop, and the crucial role of women in cocoa farming is often hidden. Here we focus on cocoa sourced in West Africa to examine these processes and draw out the gender dimension.

West Africa (particularly Cote d'Ivoire and Ghana) is responsible for nearly 70 percent of world cocoa output and characterised by smallholder farming (approximately 2 million cocoa farmers). Unlike floriculture and horticulture, the cocoa-chocolate value chain involves more segments including cocoa farmers, cocoa traders, cocoa grinders and processors, chocolate confectionary manufacturers (plus other food and cosmetic manufacturers) and retailers. As a traditional agricultural commodity cocoa was greatly affected by economic liberalisation under structural adjustment policies (SAPs) in the 1980s. This led to the disbandment of cocoa marketing boards in many producer countries and opening up of smallholder farmers to world markets.¹¹ Governments also reduced support and extension services previously available to cocoa farmers.

At the same time, the middle segments of the value chain saw increasing concentration amongst cocoa processors and chocolate manufacturers, which were able to economically upgrade by consolidating a range of functions either at the level of cocoa buying, trading and processing, or of chocolate confectionery manufacture and marketing (Fold 2002). This fuelled asymmetrical market power between a large number of fragmented smallholder farmers and a small number of oligopolistic companies. Cocoa prices saw a long term downward annual trend in real terms of 2 percent between 1950 and 2010 (LMC 2011), which was not reflected in chocolate prices. The World Bank estimates that developing country claims on value added in the cocoa sector declined from around 60 percent in 1970-72 to around 28 percent in 1998-2000 (World Bank 2008). Declining incomes and lack of government support contributed to economic downgrading in cocoa production, this is reflected in low productivity, lack of innovation or replenishment with new seedlings, inadequate use of fertilizers and pesticide, threat from disease and output of poor quality beans partly due to insufficient fermentation and drying (Barrientos, Asenso-Okyere et al. 2008; Ryan 2011).

Social downgrading was intricately linked to this process of economic downgrading in the cocoa sector, with a decline in the welfare of small-scale cocoa farm households (Oxfam 2009; Ryan 2011). Government austerity also reduced investment in social and infrastructure provision in rural localities, such as roads, electricity, education, health and housing. Economic and social downgrading is reflected in an exit of youth and younger (potentially more productive) farmers from cocoa, which they view as an occupation of low esteem and last resort. They seek a better life in the urban sector, where occupations perceived as more modern with higher earning potential (Barrientos et. al. 2008).

Economic and social downgrading in cocoa has taken place at the same time as changing patterns of chocolate consumption. The expansion of middle income consumers in emerging economies, particularly the BRICs, is fuelling an increasing demand for chocolate.¹² The consequent imbalance between cocoa supply and demand has put an upward pressure on prices over recent years. However, this has been insufficient to overcome entrenched economic and social downgrading of production. Concern intensified in 2011 when Amajaro estimated that, on current trends, cocoa demand would outstrip supply with a deficit of approximately 0.8 million tons by 2020 (Amajaro 2011; Fairtrade 2011). This prediction sent a shock wave through the industry. Chocolate companies are increasingly

¹¹ An exception was Ghana, which managed to retain its cocoa marketing board COCOBOD against World Bank prescriptions, but liberalised the purchase of cocoa by Licenced Buying Companies.

¹² The world consumption of chocolate confectionery in the 19 leading consuming nations for which data is available grew at an annual average increase of 1.3% for the period 2000-2008, however the growth in consumption in emerging countries is much higher. In India for example, it grew at over 10% in the same period (industry sources).

concerned about the risks to future resilience of cocoa supply in their value chains. They are orchestrating many initiatives to support and promote productivity and quality amongst smallholder cocoa growers as well as improve cocoa livelihoods.¹³

Cocoa is generally presented as a ‘male crop’, however the gender dimension of cocoa production is often overlooked. Women constitute an estimated 25 percent of recognised farm owners in West Africa. Despite this they also play a hidden but crucial role as unpaid workers on cocoa farms or as unpaid family labour. Women farmers face many problems in production, with smaller land holding, less access to inputs (fertilizers, credit) and lower incomes. However, despite these constraints women can be very able farmers. In Ghana, for example, one study found no significant difference in land productivity between male and female farmers and more efficient use of hired labour by women (Vigneri and Holmes 2009).

Small scale farms are also very dependent on female members working as unpaid family labour, they carry out an estimated 45 percent of the labour in cocoa (Greene and Robles 2014). The division between reproductive (household) and productive (market) activity is often blurred in small-scale farming. Studies have found that women are involved at various stages of production. This is demonstrated in the example of Ghana, as shown in Table 2. Young trees are grown alongside subsistence and other crops mainly tended by women. Drying and fermentation often takes place outside the homestead or in nearby village facilities and involve women as well as men. As Table 2 shows, women’s activities were particularly concentrated in planting, young plant care, fermentation and drying of cocoa.

It is well recognised within the chocolate industry that early plant care and post-harvest activities are critical for enhancing productivity and quality. Early plant care (particularly pruning of the young plants) increase yields per tree. Post-harvest activities (drying and fermentation) are critical to the final flavour of cocoa beans required to produce quality chocolate. Male farmers often shortcut the process by reducing the time spent on post-harvest activities in order to sell the beans quickly, undermining quality. However, practitioners recognise that women can be more caring and aware of the importance of tending the crop in order to achieve better results (Barrientos 2014).

¹³ See Barrientos forthcoming 2014.

Table 2 – Gender Roles in Ghanaian Cocoa Production
(Based on Focus Group Discussion reporting of activities)

Activity	Male	Female
Land/crop preparation	Some men	Mostly Women
Weeding		
Spraying	Mostly men	Few women
Pruning	Mostly men	Few women
Harvesting pods	Mostly men	Some women
Fermentation	All	All
Drying beans	All	All

Source: (Agyare-Kwabi 2009)

For chocolate manufacturers and processors these are essential activities for meeting changing tastes within more segmented consumer markets, which are themselves gendered. Women are important purchasers of chocolate, and as consumers women favour higher cocoa quality chocolate. The gender dimension of the cocoa-chocolate value is shown in Figure 4. At the consumer end of the chain the medium and high quality segments of the market are highlighted to indicate women’s preferences, and at the production end of the value chain the early crop and post-harvest activities are highlighted to indicate women’s important role in these activities. Women also play an important role in civil society initiatives (such as Fairtrade) to improve conditions in cocoa production, including for female farmers, as indicated by the arrows in Figure 4.¹⁴ An important issue, however, is that whilst chocolate manufacturers are able to charge a higher price for quality chocolate, women’s contribution at the production end is poorly or unremunerated. The value creation in which women play an important role is therefore captured by processors and manufacturers further along the chain.

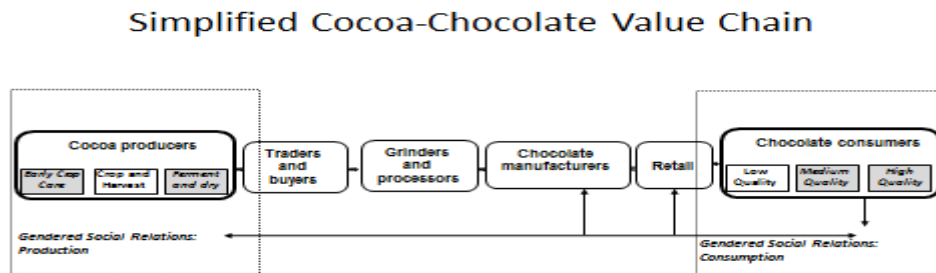
Companies within the chocolate sector are beginning to wake up to the important role women play in cocoa production. The *Cadbury Cocoa Partnership*, established in 2008, has included a gender focus when supporting local cocoa-growing communities, as has its successor *Cocoa Life* launched by Mondelez in 2012. Mars has undertaken a gender assessment of its value chain and is enhancing the gender sensitivity of its initiatives to promote cocoa farming (Greene and Robles 2014). Chocolate companies focus on gender was spurred by Oxfam International’s launch of the ‘Behind the Brands’ campaign by in 2013.¹⁵ This assessed leading food companies based on their own publicly reported activity on selected issues including gender discrimination. In the assessment none achieved ‘good’ or

¹⁴ The Fairtrade co-operative Kuapa Kokoo in Ghana has had a gender programme in place since the late 1990s, initiated as a result of its engagement with UK civil society organisations including TWIN. The certification organisation Utz has a gender programme in cocoa since 2009 (Barrientos 2014).

¹⁵ <http://www.behindthebrands.org/>

‘very good’ at addressing gender discrimination, only ‘some progress’, ‘poor’ or ‘very poor’. Companies clearly have a long way to go to promote gender equity in their value chains. Despite advances, deeply embedded gendered constraints persist in the recognition of women as workers and farmers. However, increasing concern with future cocoa sustainability is raising gender awareness in their GVCs, leading to greater focus on social upgrading of women and their communities as a means of promoting future economic upgrading.

Figure 4



Source: Barrientos 2014

In sum, a number of drivers of economic and social downgrading have been identified in West African cocoa, which can be divided into three broad categories:

- Economic downgrading of smallholder cocoa producers is a long term process resulting from an overall decline in cocoa prices and lack of support, which is reflected in declining cocoa incomes, productivity and quality.
- This has contributed to social downgrading and poor livelihoods of cocoa households and communities. Rising demand for chocolate in Asia is leading to predictions that cocoa demand will soon outstrip supply. The gender dimension of cocoa production is rarely recognised, yet women do play an important if hidden role, especially in aspects that enhance productivity and quality.
- Private and civil society governance initiatives are addressing economic and social upgrading. Increasing concern over the future resilience of cocoa supply has spurred cocoa processors and chocolate manufacturers into a range of initiatives to support cocoa farmers and communities. The gender dimension is beginning to be recognised, but it is too early to say whether this could address long embedded gender inequalities or enhance remuneration for women’s contribution to value creation.

5. Promoting Gender Equitable Upgrading

The above analysis helps to unpack the inter-section between commercial sourcing through GVCs and gender embeddedness of production. The examples of economic and social upgrading and downgrading show that outcomes for producers and workers can vary in different contexts. Meso level case studies bear out Bernhardt and Milberg’s (2011) finding that economic upgrading *can* but does *not necessarily* lead to social upgrading. They provide examples of where economic and social upgrading have concurred, where outcomes are mixed for different groups of producers and workers,

and where economic and social downgrading have reinforced each other. The studies cited here help highlight three dimensions that can play important and overlapping roles.

Gender dynamics of GVCs and upgrading

Gender commercial dynamics can play an important role in economic and social upgrading and/or downgrading in GVCs. Economic upgrading and move to higher value activities is underpinned by the need to attain greater quality and efficiency. Women have been drawn into production in particular labour intensive GVC segments where their socially ascribed skills of dexterity and ‘nimble fingers’ help enhance quality and productivity dimensions of upgrading in GVCs. In some contexts, such as Kenyan and Ugandan flowers, economic upgrading has facilitated partial social upgrading of workers. However, this is still not reflected in adequate remuneration for their contribution to value creation in the form of a living wage. Attracting and retaining better trained workers necessitates better pay and conditions. However, in South Africa economic drivers for better quality fruit have only led to social upgrading for some workers – those regularly employed on farm (men and women) and a largely female labour force in packhouses. Parallel commercial pressures on cost have also driven social downgrading through casualisation, affecting both men and women. In the more extended cocoa-chocolate value chain, market assumptions that price movements would always illicit sufficient quality cocoa have proved inadequate. Long term economic and social downgrading has led to threats to the future supply of both quality and quantity of cocoa. Women’s role in both is only beginning to be recognised.

Gender embeddedness of GVCs

The embeddedness of production in differing gendered environments also affects processes of economic and social upgrading. Kenyan and Ugandan flower exports provide a new working environment for women, which are shaped by gendered norms, but where more modern processes of industrial relations can be introduced. South African fruit has a much longer history imbued by paternalist relations that continue to influence farm practices, and are less well entrenched in more modern large scale packhouses. Apartheid’s legacy of poor educational provision for coloured and black workers (especially women) constrains economic upgrading in GVCs where skill increasingly matters. The hidden role of women in West African cocoa does not simply result from gender blindness in the chocolate industry, but also from deeply entrenched norms and cultures in cocoa communities that undervalue women’s real contribution to production. Gender blindness and discrimination means large resources being ploughed into raising productivity and quality, and miss the very women involved in both, who should be targeted. The bargaining position of different groups of producers, smallholders and workers appears to matter (Nathan and Kalpana 2007; Milberg and Winkler 2010). This can be affected by (i) commercial factors, such as low availability of a product or skilled labour can enhance its returns; (ii) by level of organisation, such as whether smallholders are organised in producer groups or workers in unions. Women are less often organised in either and constrained from participation due to childcare responsibilities, hence are more disadvantaged than men. Gender embeddedness therefore both shapes, but also constrains economic and social upgrading.

Private, civil society and public governance

The above macro and meso research indicates economic upgrading in GVCs does not automatically lead to social upgrading and that where it does, enhanced welfare and rights do not necessarily lead to significant improvements in value capture and distribution (i.e. more gender equitable economic upgrading). Interventions in the form of private, civil society or public governance also play a critical role. In the case of Kenyan and Ugandan flowers, where there are examples of improvements, it can be argued that economic upgrading was not alone responsible for social upgrading of women workers. Rather it needed to be accompanied by other pressures, including advocacy and campaigns by trade

unions and civil society organisations, private codes implemented by supermarkets and flower industry bodies, and legislation to ensure improvement in working conditions with more positive gender outcomes.¹⁶ Gender discrimination is deeply embedded within Kenyan and Ugandan society, and problems for women workers persist, but GVC upgrading has ensured better channels for addressing them when they occur within the workplace. Despite this, many workers (even on permanent contracts) fail to receive a living wage. In South Africa, national legislation and supermarket codes clearly helped to enhance upgrading for regular and permanent workers, but implementation and enforcement were weak for casual workers and did little to stem downgrading. Recent labour unrest in the industry (see footnote above) has brought private, civil society and government actors to the table, but it is too early to assess the impact on upgrading (or downgrading if employment falls) or whether outcomes are different for women or men. In cocoa, threat to the future supply has led to a surge of private and civil society initiatives as chocolate companies have woken up to the risks of supply chain resilience. Again, it is too early to assess impacts on upgrading, especially for women whose role is only beginning to be recognised.

Gendered policies and strategies involving all actors

Analysis of the research examined here would indicate that whilst economic upgrading does not automatically lead to social upgrading with positive gendered outcomes, it can under some circumstances play a positive role. But that this is more likely to occur where economic upgrading is reinforced by gender sensitive interventions that also promote social upgrading. This paper has focused on analysis of the underlying processes, and a separate paper would be required to explore the policy implications in more depth. Here we can only highlight some key areas. The case studies would indicate that, although there are variations between contexts, all actors – private, civil society and public – have a role to play and combined interventions are more likely to be effective.

- *Companies* alone are clearly ill-equipped to address deeply embedded gender issues in production, yet also have a role to play given their interaction with commercial sourcing. The types of initiative which companies can (and are) engaging in, but which could be made more gender focused, include corporate social responsibility, codes of labour practice, capacity building and training programmes, and community level support. In many cases these initiatives are run with NGOs as discussed below. Underpinning this, companies need to ensure their purchasing practices recognise and adequately remunerate women producers and workers. Systemic gender inequality will persist as long as economic rents of companies are based on value capture through lack of or unequal remuneration of women's contribution to value creation.
- *Governments* in the past have been seen as the key vehicle for policy support, but in a global world of GVCs their jurisdiction is often partial. However, government still has a crucial role to play, especially in linking gender equitable legislation with private sector interventions. Government policy often needs to be much more GVC targeted, especially in ensuring policy enables women entrepreneurs and workers accessing value chains. Capacity building, skills training and education need to enhance women's capabilities, targeted at upgrading requirements in value chains. Community and social provision (health, education, transport, energy and childcare facilities) are also essential in locations from which sourcing takes place – women's unpaid time is often used to compensate for inadequate social provision constraining their participation in GVCs. Governments need to implement UN Conventions on women, economic and social rights, and ensure legislation provides women with equal access to assets, including land tenure, finance and inheritance.

¹⁶ Although the flower sector overlaps with fresh vegetable exports in both countries, the same level of improvement have not occurred in fresh vegetables (Evers et. al. 2014).

- *Civil Society* (NGOs and unions) play an important role in raising issues of gender discrimination and exploitation of women producers and workers. Independent associations and unions also need to ensure they represent both women and men in value chains, whether they are permanent or engaged on a more insecure basis. A number of NGOs work closely with companies to provide support and build capacity in their value chains, they often bring a strong gender lens to such initiatives. Civil society organisations have also joined some important alliances with private sector companies in initiatives such as the Ethical Trading Initiative and International Cocoa Initiative which have been active in promoting gender focused strategies in flowers, fruit and cocoa.
- *Multi-lateral agencies and Trade Policy* needs to be much more aware of gender impacts of changing trade rules and interventions further along value chains (not just at or behind the border). International bodies can have an important convening role. The Guiding Principles on Business and Human Rights laid out by the UN Special Representative John Ruggie provides a Framework of 'Protect, Respect and Remedy' involving governments and companies (Ruggie 2013). However, this still needs to be more gendered-focused to achieve equitable outcomes for women and men.

GVCs are increasingly the vehicle for international trade and a source of incomes and employment in developing countries, as recognised by the OECD/WTO (2013) and UNCTAD (2013). There is clear evidence that women play an important and often critical role in global value chains, and this is enhancing their capacity and independent earning potential. A number of studies show that women earning an independent income are more likely than men to spend it on activities that reduce household poverty and send their children to school (GoldmanSachs 2008; WorldBank 2012). Gender equitable economic and social upgrading in GVCs thus has a critical role to play in enhancing development and reducing poverty in the future.

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