FAIR TRADE USA™

FAIR TRADE CERTIFIED™

Monitoring and Evaluation Report

FIVE YEARS OF HOUSEHOLD SURVEYS

2020-2024

November 15, 2025 | Fair Trade USA Impact, Research and Learning Team

Contents

Introduction

This report presents the results of five years of household surveys conducted across various Fair Trade Certified™ product categories from 2020 to 2024.

The Fair Trade USA™ Impact, Research, and Learning (IRL) team conducted the surveys in collaboration with the Fair Trade USA Producer Services team.

Household surveys are a pillar of the Fair Trade Certified Monitoring, Evaluation, and Learning (MEL) scheme, bringing a quantifiable perspective to the direct voices of those impacted by Fair Trade: producers, workers, and fishers. More information on the Fair Trade USA MEL system can be found here.

The household surveys are only one element of the MEL system. Their purpose is monitoring, utilizing closed, multiple-choice questions to quantify responses, without the possibility to probe deeper to elaborate on responses or understand underlying reasons. Household surveys help us understand the status quo (the "pulse") and enable the IRL team to establish baselines to design in-depth studies on specific topics (see, for example, Premium Research here).

Nevertheless, there are interesting findings and corroborated figures that highlight the value of Fair Trade Certification which are worth capturing and sharing in this report, and to make available to the general public.

Methodology

The surveys were deployed in two main approaches, depending on the set-up:

- **Agricultural Production and Capture Fishery programs:** Surveys took place on site, in the local language, administered by hired enumerators using tablets equipped with Qualtrics software. Fair Trade USA staff trained the enumerators on the survey implementation methodology and to collect high-quality data. In a handful of cases, when it was considered possible, surveys took place remotely, with online enumerators surveying workers via Zoom calls or phone calls. This was mainly the case during the COVID-19 pandemic to reduce in-person contact.
- **Factory program:** Surveys were deployed using the services of Elevate/LRQA, a third-party survey implementation agency. In most cases, respondents used their phones to respond using the remote technology Laborlink, and only in cases where our field staff considered it necessary the surveys were deployed onsite to assist in the quality of the responses.

In all cases, respondents were informed of the voluntary and anonymous nature of their participation.

Although the household surveys date back to 2013, the questions changed over time and across contexts until 2020, when the Fair Trade USA MEL was redesigned in 2020. Under this redesign, the surveys were standardized along core questions, ensuring consistency across years and contexts. As a result, only surveys conducted from 2020 to 2024 are analyzed in this report.

Data from 2025 is excluded, as surveys are still in progress; these data will be included in future versions of this report.

Overall, about 49,000 total respondents were surveyed from 2020 to 2024 across 19 countries and five Fair Trade Certified product categories (Coffee, Consumer Packaged Goods (CPG), Factory, Produce and Floral, and Seafood). In total, 151 different certified organizations were surveyed.

Survey results were obtained using representative sampling at a 95% confidence level and ±5% margin of error. This means that the number of respondents in each survey is representative of the total number of farmers (for the small-scale producer organization (SPO) surveys) and workers (for the hired labor (HL) surveys) in the respective cooperatives, farms, and factories at the time of the study.

Because of the different levels of complexity and costs involved in carrying out a survey of this scale in a cooperative context compared to a farm context, and because of differences in our programs, the number of responses from workers is disproportionately larger than those from farmers. When the results between the two subgroups differ significantly, we provide both answers.

There are two types of survey templates: one for organizations of small-scale farmers or fishers, and one for contracted worker set-ups, such as large farms and factories. The text is adjusted to the specific set-up, but the results are nevertheless comparable and can be aggregated. In the case of factories, a reduced version of the hired labor survey is applied, as it needed to be shorter because workers complete the survey by themselves and, in this mode of deployment, it is harder to complete a survey that takes more than 10 minutes.

To ensure accessibility, the text of the questions has been translated into 15 languages.

The following limitations/disclaimers should be considered when interpreting the survey results:

1. All the data from the surveys are self-reported information; thus, we were unable to cross-reference the information provided for accuracy.

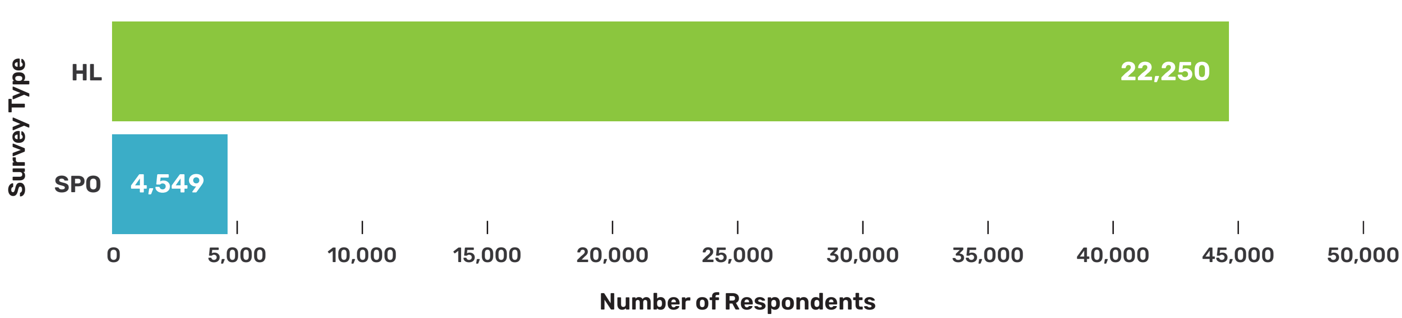
2. For the Agricultural Production program, the results in this study combine producer organizations that are directly certified by Fair Trade USA and those who obtained certification via the Recognition Program of the Fairtrade International scheme, which is considered equivalent by Fair Trade USA (hence the recognition) but has its own particularities.

3. The surveys contain more questions than those presented in this report. Questions whose responses we cannot rely on due to severe discrepancies (such as questions referring to income figures) have been excluded as unreliable. Demographic questions are also excluded, as they are only captured to enable analysis and are not impact monitoring elements themselves.

Population

Number of Respondents 48,799

- 44,250 Farm and factory workers
- 4,549 Small farmers and fishers



Findings - Aggregated Analysis

This chapter comprises five sections. Each section groups questions by topic to facilitate analysis and understanding of the data. As explained under the methodology, not all questions were available in all surveys; therefore, each questions specifies the groups to which it was asked.

Some survey questions use specific Fair Trade concepts and terms used in the standards, that the respondents are familiar with, such as Premium or Fair Trade Committee. Definitions for these terms can be found in the public Glossary document.

Fair Trade

This first sections groups questions about the implications of Fair Trade in the organization.

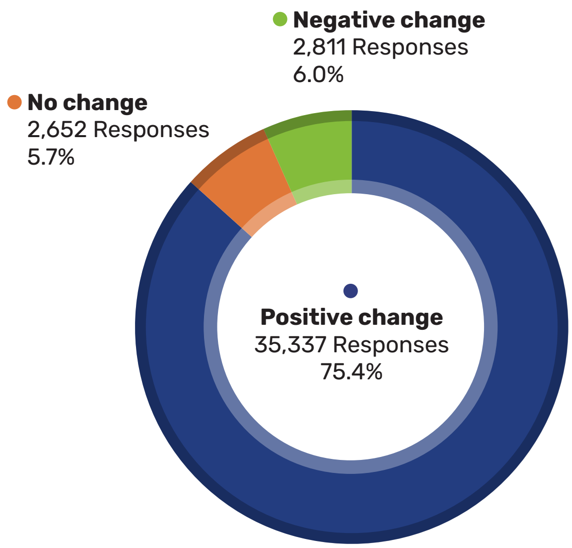
1.1. Fair Trade Change: *"In your opinion, has Fair Trade certification changed your farm/factory?"*

- This question was asked in all types of surveys, whether directed to workers or to farmers and fishers, to understand if there is a perceived change arising from certification. The question was, however, excluded from baseline surveys, i.e., those in the first year of certification before premium was received, as the full impact of the certification could not yet be seen. More than 75% of responses indicated a positive change, more than 17% did not know or did not see any change, and 6% flagged a negative change.

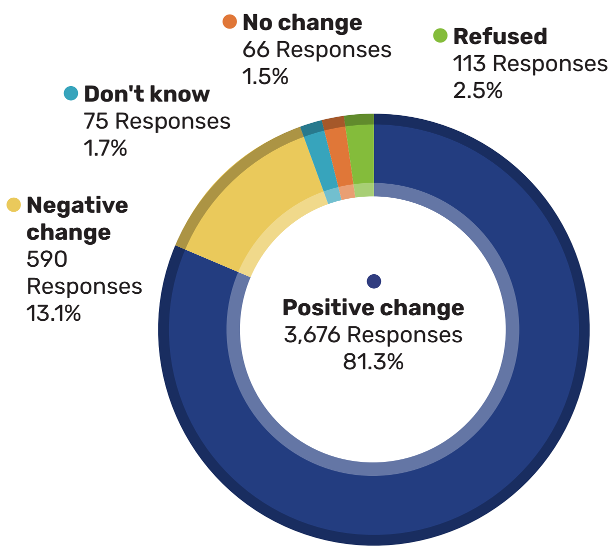
- If only responses from small farmers and fishers are considered, there is less middle ground with more polarized views: while a larger 81% reported a positive change, the negative responses also increased to 13%.

- While in all cases the positive responses are clearly higher, as could be expected, the rate of discontent is not negligible and deserves further research.

1.1 Fair Trade Produced Change



1.1 Fair Trade Produced Change (SPO)



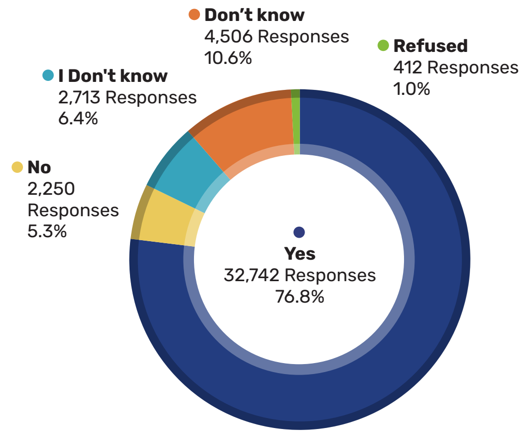
1.2. Premium Spending Satisfaction: *"Are you satisfied with how the premium was spent?"*

- Responses showed very similar results to the previous question, as they were asked in the same cases and there is an obvious link between the two. Seventy-five percent of all responses were positive, 5% negative, and almost 17% neutral, including respondents who did not know how the premium was spent.
- In this case, the SPO-only responses are virtually the same, with a slightly lower lack of knowledge of the premium expenditure.
- As before, results are clearly positive, with a need to investigate further, specially why in some cases the use of the Premium is not known.

1.3. Fair Trade Benefits: *"What are the benefits of the Fair Trade program?"*

- Survey participants were asked about the benefits of the Fair Trade program, and as before, this was a question for everyone except the recently certified organizations. This question, unlike the rest in the survey, allowed for more than one answer.
- The responses show a multitude of identified benefits, going beyond just the premium received.
- In the case of workers, the most repeated value from Fair Trade for them is, besides the Fair Trade Premium, an increase in benefits and regularity of income, as well as a sense of community and feeling valued, training opportunities, and other non-specified benefits.
- Responses from farmers and fishers are very similar, with a minority also identifying the specific benefits of more sustainable farm practices and, in the case of the Capture Fisheries program, the formation of a fisher association.

1.2 Satisfied With Premium Spending



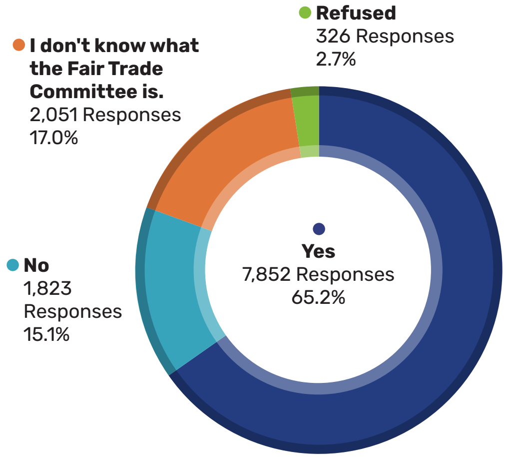
1.3 Fair Trade benefits HL	Times selected	%
Premium fund	3,033	20.6%
Increased benefits	2,533	17.2%
Feeling valued by the farm/coop/factory	1,969	13.4%
Regular income	1,621	11.0%
Training	1,396	9.5%
Sense of community	1,281	8.7%
Other	2,055	14.0%
Refused	313	2.1%
Don't know	491	3.3%

1.3 Fair Trade benefits SPO	Times selected	%
Premium fund	3,024	23.3%
Training	2,641	20.4%
Increased benefits	2,030	15.6%
Regular income	1,559	12.0%
Feeling valued by the farm/coop/factory	1,456	11.2%
Sense of community	1,405	10.8%
More sustainable farm practices	276	2.1%
Formation of a fisher association	58	0.4%
Other	239	1.8%
Don't know	221	1.7%
Refused	67	0.5%

1.4. Fair Trade Suggestion: ***"Do you feel you can take a suggestion to your Fair Trade Committee Representative?"***

- Survey participants were asked about their feeling of being able to propose suggestions to the committee. Here, the majority (65%) declared they could, but a not an insignificant 17% declared they did not know who the representative was or how to propose suggestions, which shows the importance of constant communication within the organizations, which seems could use some improvement.

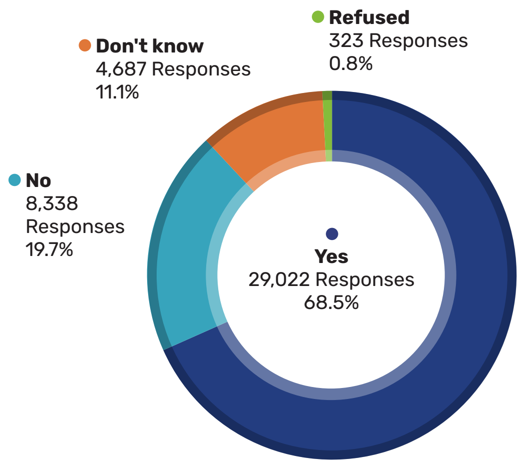
1.4 Fair Trade Suggestion



1.5. Voted on Premium Project: ***"In the last year, did you vote on your Premium Project Plan?"***

- Similarly to the previous question, a majority of respondents voted on the premium project last year. Here, it is important to mention that, in contexts of high rotation, a percentage of those who did not vote corresponds to workers who were not employed in the prior year.

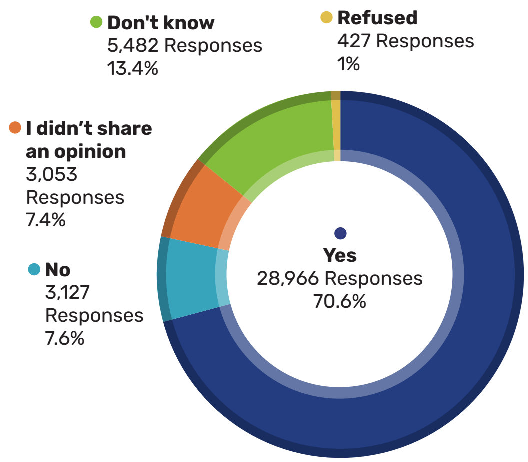
1.5 Voted on Premium Project



1.6. Opinion considered on Premium Project: ***"Do you feel your opinion was taken into consideration during the decision-making process on the spending of Fair Trade Premium?"***

- With similar ranges, a majority (70%) believed their opinion was considered in the decision on how the premium should be spent, which shows a high level of participation and inclusion in the premium decisions, precisely the main objective of its existence and prominent place in the Fair Trade Standards. It is worth noting that only a minor percentage (7.6%) answered "no," i.e., feeling clearly not represented, to this question.

1.6 Opinion Considered

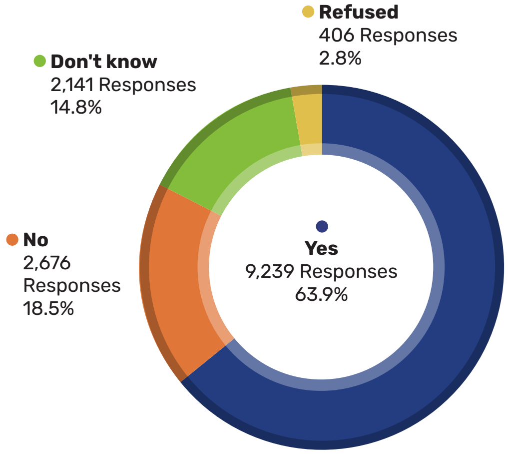


Individual Wellbeing

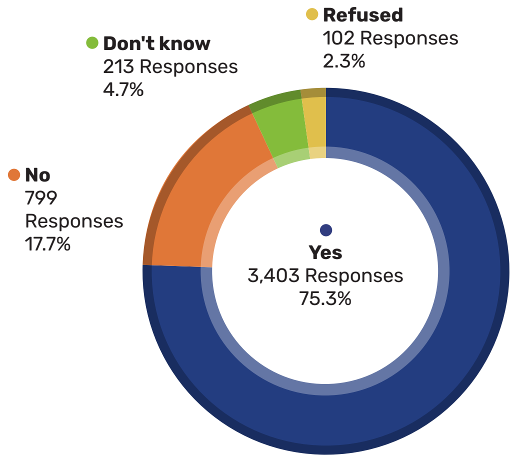
2.1 Fair Trade Improved Your Life: *"Has Fair Trade improved your life in the last 12 months?"*

- (This question was only asked in the Agricultural Production and Capture Fishery programs). Both workers and farmers/fishers mostly provided positive responses to this question, with almost two thirds (63%) believing that Fair Trade has created a recent improvement in their lives, although this percentage is higher for farmers (75%) than for workers (58%). The percentage is positive but also limited, hinting at the important but at the same time restricted reach of what Fair Trade can address related to underlying living conditions and inequalities.

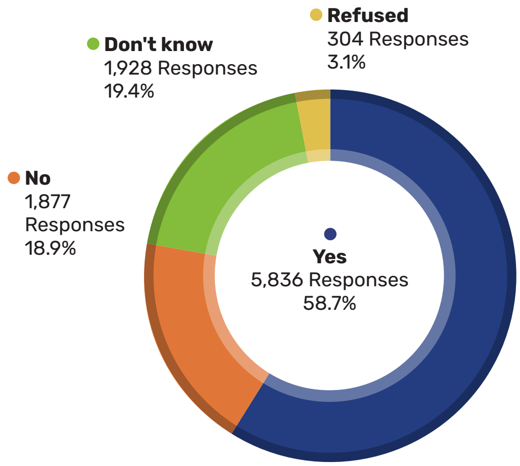
2.1 Fair Trade Improved Life



2.1 Fair Trade Improved Life SPO



2.1 Fair Trade Improved Life HL



2.2 Material conditions: Food Insecurity, Skipped Meal and Access to Running Water

- To better understand the situation of farmers, workers and fishers, a few questions are asked with the intention of being able to monitor this in the long term and identify changes. Over the last few years, we can see that approximately 12% of respondents experienced food insecurity, with 16% expressing that at times there was no food of any kind, and 11% reporting no access to running water.

	Yes	No	Don't Know	Refused	TOTAL Responses
Experienced Food Insecurity: Have you or your household experienced any form or food insecurity situation in the past 4 weeks (30 days)?	1,848 (11.8%)	13,567 (86.5%)	4 (0,03%)	272 (1.7%)	15,691
Skipped Meal: In the past 12 months, was there ever no food to eat of any kind in your household because of lack of resources?	7,697 (16.4%)	37,702 (80.4%)	1,046 (2,2%)	445 (0.9%)	46,890
Access to Running Water: Do you have access to running water in your home?	7,052 (88.5%)	905 (11.4%)	0 (0%)	14 (0.2%)	7,971

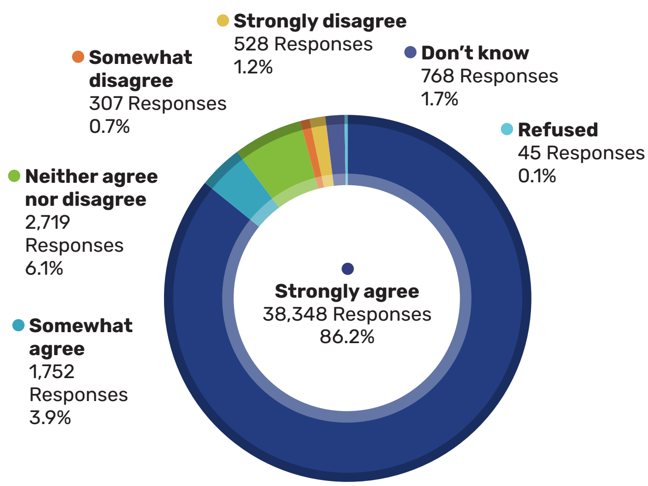
The second question is asked in all surveys, while the first and the third questions are only asked in agriculture set-ups.

Workplace Wellbeing

3.1 Workplace Safety: *"Do you agree with the following statement? "I feel physically safe working at this farm/factory."*

- (This question was only asked to workers, that is, in surveys conducted in factories or large farms.) There is a clear majority of respondents who strongly agree with this statement (86%), and less than 2% disagree (either strongly disagree or somewhat disagree), which is a clear indication that Fair Trade farms and factories are considered safe places to work by workers and farmers.

3.1 Safe Working Conditions



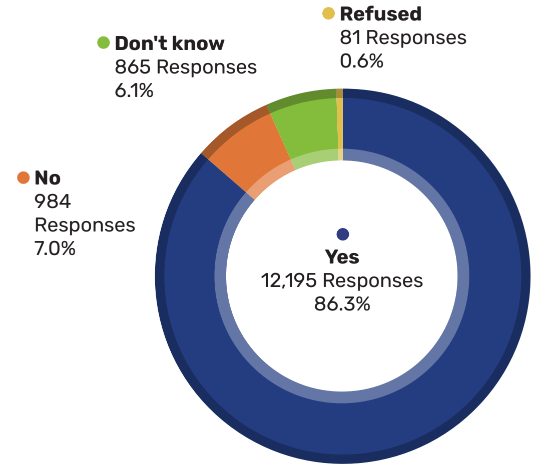
3.2 Trust Leadership: *"Do you trust farm leadership?"*

- (This question was only asked in the Agricultural Production and Capture Fishery programs.) Again, a large majority (86%) responded positively, indicating trust in the management of the farms or organizations. 7% responded negatively.

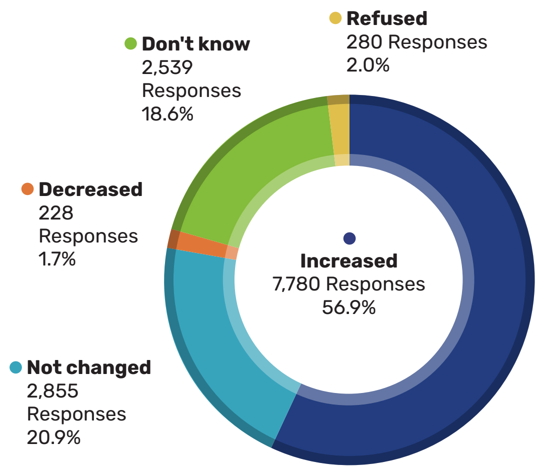
3.3 Trust Change Since Fair Trade Certification: *"Since the Fair Trade certification, how has your level of trust in farm leadership changed?"*

- (This question was only asked in the Agricultural Production and Capture Fishery programs.) 56% of the respondents indicated that their trust has increased since the farm or organization obtained Fair Trade certification. Coupled with the previous question, this can be interpreted to mean that workers in Fair Trade farms, and members of Fair Trade organizations, generally trust their management and that in most cases this trust increases when the farm or organization joins Fair Trade.

3.2 Trust Leadership



3.3 Trust Changed



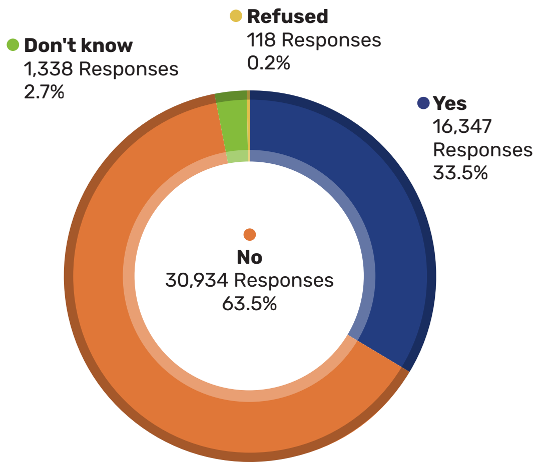
3.4 Leadership Feedback and Leadership Feedback Satisfaction: *"Have you shared a grievance or complaint with leadership in the last 12 months? and if so, were you satisfied with the way leadership addressed your grievance or complaint?"*

- One third of respondents shared a grievance or complaint in the previous year, and 70% of those who did, reported being extremely satisfied with how the farm or factory leadership responded to this complaint.

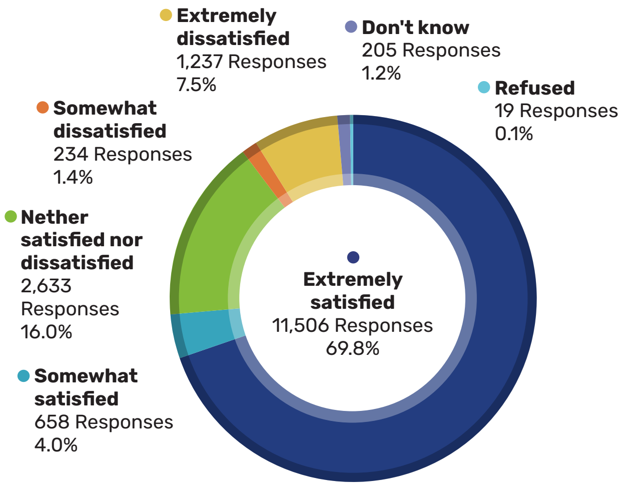
3.5 Experience of Discrimination, Harassment, and Sexual Harassment: *"In the last 12 months have you experienced any of these issues while working here?"*

- (This question was only asked to workers, that is, in surveys conducted in factories or large farms.) 92% of the respondents declared not having endured any of these experiences. It is important to point out that this figure needs to be taken with caution, as a survey, despite being anonymous, is not the most adequate method to understand delicate situations such as this, which are difficult to disclose unless a genuine rapport has been established. It is not considered that this figure fully reflects reality, but it is used as part of the monitoring system to understand changes over time and identify potential risk trends.

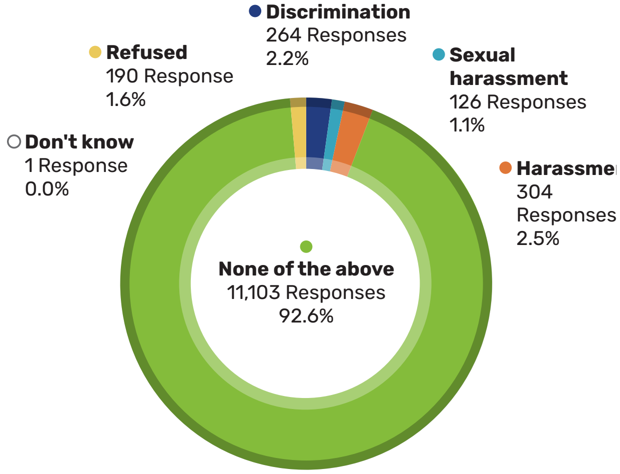
3.4 Reported Grievances to Leadership



3.4 Satisfied Leadership Solution



3.5 Discrimination/Harassment



4. Income

4.1 Sufficient Wage/Income: "Is the money you earn from working at this farm/factory enough to cover your household's basic expenses?"

- Two thirds of responses (65%) indicated earning enough to cover the household's basic expenses. It should be noted that this question does not necessarily imply a living wage/living income, which has its own specific methodology and considers benefits outside wages as well as minimum discretionary expenses beyond basic needs.

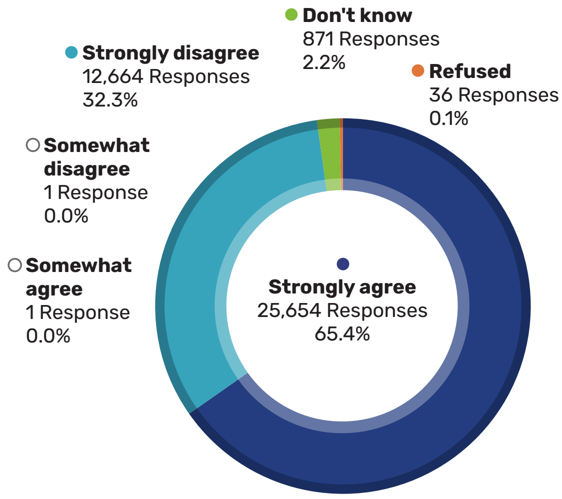
4.2 Save Money: ***Do you save a portion of your salary each month?***

- (This question was only asked in the Agricultural Production and Capture Fishery programs) Almost 70% of respondents reported having enough earnings to be able to save every month.

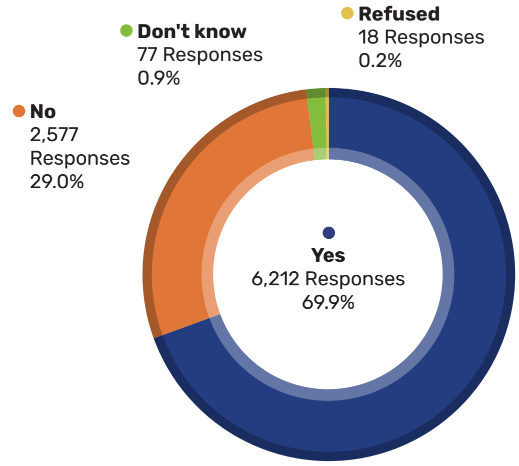
4.3 Financial Resilience: ***If there is an emergency, do you have the financial ability necessary to address the need?***

- Despite the above, it is important to note that 44% of responses from workers and farmers indicated that they would be unable to address an unexpected need of any kind, which demonstrates the possibility? of low financial resilience and a high risk of falling into financial problems. This is a similar figure to those who declared being able to do so (46%).

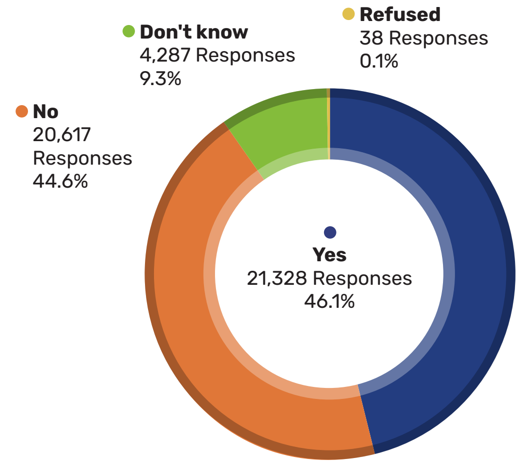
4.1 Sufficient Wage/Income



4.2 Saved Money



4.3 Financial Resilience



5. Environmental Practices

Conservation Practices in the Farm

- (The following questions were only asked to coffee producers under the Agricultural Production program, in a specific questionnaire) 90% of respondents reported applying soil conservation practices on their farms, such as recycling organic matter, interplanting, using nitrogen-fixing plants, cover crops, or mulching. In addition, 68% of respondents reported using water conservation methods, including drip irrigation, rainwater catchments, or water-efficient processing systems.

	Yes	No	Don't Know	Refused
Water Conservation: Do you use applicable water contamination prevention practices on the farm?	1,616 (67%)	749 (31%)	31 (1%)	8 (0.3%)
Water Contamination Prevention: Do you use applicable water contamination prevention practices on the farm?	1,926 (80%)	447 (19%)	23 (1%)	8 (0.33%)
Fertilizer Application Training: Have you ever received advice, training, or an assessment on how to apply fertilizers? Exclude any sellers/providers of fertilizers.	2,124 (88%)	265 (11%)	15 (0.6%)	2 (0.08%)
Soil Conservation: Do you use applicable soil conservation practices on the farm?	2,164 (90%)	220 (9%)	17 (0.7%)	3 (0.12%)

Findings - Longitudinal analysis

This longitudinal analysis draws on household survey data from Fair Trade Certified organizations that have been surveyed at least twice since 2020, when the household survey questions were revised for consistency. Responses from the initial household surveys conducted between 2013 and 2019 were excluded from this analysis.

The dataset covers several Fair Trade Certified product categories, including Factory, Produce, Coffee, and CPG. The number of certificate holders with at least two survey rounds in each category is shown below:

Number of organizations surveyed twice in the period 2020-2024, per product

Product category	Number of organizations
Factory	16
Coffee	2
CPG	3
Produce	5

Our hypothesis is that participation in the Fair Trade program has a positive and noticeable effect on the well-being of workers and farmers, in ways that they can perceive and describe. We also hypothesize that this effect increases over time. In practical terms, this implies that, holding other factors constant, if an organization is surveyed twice, the second survey would be more likely to show more positive responses than the first survey.

Analytical approach

We designed an analysis to help us understand if the hypothesis were correct. From the survey data, we selected key questions related to farmers' and workers' well-being. For each question and for each organization with at least two survey rounds, we calculated the percentage of positive responses in both years.

- If the percentage of positive responses was higher in the later survey than in the earlier one, we coded that data point as **"Yes"** (improvement).
- If the percentage remained the same or decreased, we coded it as **"No"** (no improvement).
- If the question was not asked in one of the survey rounds, or we only had data for one year, the data point was left blank.

We then calculated, for each indicator, the proportion of organizations showing an improvement between survey rounds. We interpret this proportion as the **probability that survey results for that indicator improved over time.**

In this context, "improvement" means that the results move closer to the desired outcome. For all indicators used, this corresponds to an increase in positive responses (e.g., higher participation in premium project voting).

These probabilities should be understood as a proxy for the likelihood that Fair Trade certification is contributing positively to that outcome. Higher probabilities suggest a stronger likelihood of a positive effect. A more rigorous causal analysis would be required to conclusively attribute changes to Fair Trade certification, but we consider this a useful indicative measure.

Sample composition and limitations

The dataset is heavily weighted toward the Factory category, which accounts for approximately 62% of all data points. CPG, Produce, and Coffee combined represent the remaining 38%. As a result, the findings are more representative of the Factory category, and results for other categories should be interpreted with caution.

In addition, not all questions were asked in all product categories or across all survey years. Some indicators are only available for agricultural organizations, while others are specific to factories. Missing data also occur where questions were introduced later or where responses were incomplete. These limitations should be taken into account when interpreting the probabilities below.

Results

Probability that survey results improved over time

(Percentage of organizations where the indicator improved between survey rounds, ordered by number of organizations)

Survey question	Probability of improvement (%)	Number of organizations
Fair Trade’s positive change (1.1)	**81%**	26
Premium project voting (1.5)	**75%**	24
Premium satisfaction (1.2)	**79%**	24
Has financial resilience (4.3)	**42%**	24
No skipped meals (2.2)	**52%**	23
Workplace safety (3.1)	**57%**	21
Sufficient Wage/Income (4.1)	**20%**	15
“Fair Trade has improved my life” (2.1)	**60%**	10
Trust in leadership (3.2)	**60%**	10
Has saved money (4.2)	**50%**	10

Analysis

Overall, a majority of organizations show improvement over time on several key indicators related to participation, satisfaction, and perceived benefits of Fair Trade certification. The broadest indicator **Fair Trade's positive change** (that counts the "positive change" responses to the question "In your opinion, has Fair Trade certification changed your farm, factory, cooperative?)" suggests that 81% of organizations experienced at least one area of improvement between survey rounds.

Indicators with relatively large coverage (20+ organizations), such as **premium project voting, premium satisfaction, financial resilience, no skipped meals,** and **workplace safety**, provide a more reliable signal of trends across the sample. Among these, premium-related indicators (voting and satisfaction) show particularly strong probabilities of improvement (75–79%), suggesting that workers and farmers are increasingly engaged in and satisfied with Fair Trade Premium decision-making processes. In this area, workplace safety shows a moderate likelihood of improvement (57%), but it should be noted that, as indicated in the first section of this report, perceived safety levels are already very high, so further noticeable improvements may be less feasible.

On well-being indicators, results are more mixed. While **financial resilience, no skipped meals,** and **enough wage/income** show some improvement, their probabilities are lower (42–52% for resilience and meals, and 20% for living wage), indicating that advances in financial security and income adequacy may be slower or more uneven across organizations. Perception-based indicators such as **"Fair Trade has improved my life"**, and **trust in leadership**, display moderate to high probabilities of improvement, but are based on smaller samples and are only asked in certain product categories (mainly agriculture), so they should be interpreted with caution.

The longitudinal analysis therefore suggests that Fair Trade certification is associated with positive changes over time in several important areas of workers' and farmers' well-being, particularly around engagement in premium decision-making, satisfaction with Fair Trade, and perceptions of improved life and working conditions. However, additional progress on more structurally difficult outcomes, such as living wages (beyond the initial threshold of ensuring legal wages are paid) or financial resilience, appears slower and less consistent.

Because the dataset is dominated by Factory organizations and many questions are only asked in specific sectors or years, these findings should be interpreted as indicative rather than definitive evidence of Fair Trade's impact.

Conclusions

This report presents key insights into the experiences and perceptions of nearly 49,000 workers, farmers, and fishers engaged in Fair Trade supply chains between 2020 and 2024. Overall, the household survey data suggests that Fair Trade certification is associated with positive changes in several important areas, particularly around perceived benefits, workplace conditions, and participation in decision-making.

The results on workplace well-being are generally encouraging, with high reported levels of physical safety, trust in leadership, and satisfaction with how grievances are addressed, alongside evidence of widespread adoption of positive environmental practices in some product categories. At the same time, the data shows that material vulnerabilities remain significant and that a non-negligible proportion of respondents do not perceive positive change or do not feel adequately represented in decision-making, which is expected in some situations but will nevertheless require continued attention.

The longitudinal analysis suggests that most organizations experience improvements over time on core participation and satisfaction indicators. Progress on more structurally complex outcomes, such as financial resilience and income adequacy, is slower and less consistent, suggesting that Fair Trade does contribute to better conditions but cannot be expected to solve, on its own, all challenges related to inequality.

These survey findings, while mostly positive, must be understood as one component of a broader MEL system rather than definitive proof of impact on their own. As self-reported and largely perception-based data, they need to be complemented and corroborated with more targeted causal research and in-depth studies to better understand how and under what conditions Fair Trade contributes to change that positively affects farmers, fishers and workers.

At the same time, the sheer scale of these results (with 48,799 responses collected across multiple years, countries, and product categories) is a clear indication of what workers, farmers, and fishers think about their participation in Fair Trade, and provides a strong foundation for guiding future improvements and learning across the Fair Trade system.

About Fair Trade USA™

Fair Trade USA, a tax-exempt 501(c)(3) nonprofit organization, is the leading certifier of Fair Trade products in North America. Offering award-winning, rigorous, and globally recognized sustainable sourcing certification programs that improve livelihoods, protect the environment, and build resilient, transparent supply chains, its trusted Fair Trade Certified™ label on a product signifies that it was made according to stringent Fair Trade standards. Fair Trade USA is building an innovative model of responsible business, conscious consumption, and shared value to eliminate poverty and enable sustainable development for farmers, workers, their families, and communities around the world.

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