

SQUARING THE CIRCLE: GLOBAL PRODUCTION AND THE INFORMALIZATION OF WORK IN SOUTH AFRICAN FRUIT EXPORTS

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Abstract: South African fruit growers simultaneously face rising standards imposed within supermarket global value chains, falling market prices internationally, and increasing government legislation. These pressures are leading to falling permanent employment and increasing use of contract labour on fruit farms, tempered by the need to employ skilled workers to meet quality and labour standards. Informal contract employment provides some (male) workers with regular work at relatively good pay, but others (particularly women) work for short periods at low pay. None enjoy work security or employment benefits. The informality of work intensifies their risks and vulnerability to poverty. Copyright © 2004 John Wiley & Sons, Ltd.

1 INTRODUCTION¹

We are witnessing two contradictory pressures operating on labour in the global economy. On the one hand, globalization is leading to the increased use of informal workers linked to export production. These workers usually suffer poor remuneration and insecurity of employment. On the other hand, many large global buyers are demanding rising production standards, including improving employment conditions within their supply chains. This paper analyses how these two contradictory trends are affecting the informalisation of work through the use of contract labour in one specific export sector—South African deciduous fruit. This provides an example of how these contradictory pressures are being mediated at a local level, where we have the additional factor of changing government regulation of labour in the post apartheid era. This has served to

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reinforce the combined dichotomy that has emerged in global production between rising standards and the informalisation of work

This paper explores the pressures operating on the employment strategies of fruit producers by drawing on the combined analytical approaches provided by a trade and poverty framework and global value chain analysis. The focus of this paper is to consider the connections between global trade, supermarket buying strategies, national regulation and their combined effect on the informalisation of work. In order to reduce labour costs and remain competitive, many producers are downsizing their permanent labour force, and increasing their use of contract labour. But there are limits to this process because of the need to retain quality, both to meet changing employment regulation and supermarket requirements for high production and employment standards. From the standpoint of contract workers, this interplay is reflected in different pressures operating simultaneously in relation to incomes and security of employment. Some contract workers receive very low incomes and insecure employment, whereas others are able to earn relatively good incomes, and work for most of the year. None, however, has any formal security of employment, and they receive no legal or social protection despite working in global export production.²

The paper is divided into four sections. The first section examines different perspectives on Globalization and informal work. It examines economic analysis of the different channels through which trade and poverty are connected, and explores the global value chain approach as a framework for unpacking the role of the informalization of work. The second section draws on a specific case study from the South African fruit sector, and examines the specific pressures and counter-pressures operating on producers in the global fruit market. These arise from the combination of the global value chain, market conditions and government legislation, and have the contradictory effects of reducing real prices and increasing competition whilst raising standards and quality of production. The third section examines the consequences of the pressures and counter pressures in terms of the changing employment strategies of producers, for and against the increased informalization of work. Finally, the consequences for labour are considered in relation to the effects on the conditions and security of the employment they face.

2 PERSPECTIVES ON GLOBAL PRODUCTION AND INFORMAL WORK

Globalization is increasingly associated with the informalization of work (ILO, 2002), but the linkages between the two are often complex. Diverse pressures operate through the global economy, in terms of international trade and the functioning of global value chains, which are mediated at a local level via national regulation. McCulloch *et al.* (2001) provide a useful framework for analysing the linkages between trade reform at a macro level and poverty at a household level based on the three channels: enterprise, distribution and government. Whilst this provides the broader economic picture, on its own it is insufficient for the purposes of our analysis. Firstly, it focuses on trading relations mediated solely through market prices, and does not sufficiently take into account changing trade relations mediated within supply chains. Secondly, it focuses directly

²This paper focuses specifically on the linkages between global production and the informalization of work. It does not explore poverty at the level of workers' households, which has been explored in depth elsewhere (Barrientos and Kritzinger, 2003).

onto poverty at the household level, whereas our focus here is on the mediating role of informal employment linked to export production. Global value chain (GVC) analysis helps to examine changing global commercial relationships between firms in more depth. It focuses on transactions between firms operating within the value chain, and how relations between buyers and sellers are often based on established supply networks that facilitate the integration of the chain. The food sector reflects buyer-driven value chains, which are increasingly dominated by large supermarket buyers.

Global value chains allow governance and hence control of production by global buyers without direct ownership (Humphrey and Schmitz, 2001). Buyers can reduce transaction costs, without bearing any of the risks that ownership or franchising might incur, whilst facilitating global mobility between suppliers. The retailers' adoption of just-in-time production methods passes the costs of demand instability and inventory control on to producers. At the same time, global buyers can exert control over production specifications, and govern quality through the use of production standards (Dolan and Humphrey, 2001; Nadvi and Wältring, 2001). Their dominant position within global value chains allows buyers to reap a high economic rent compared to suppliers, who are in a more competitive situation at the producer end of the chain (Milberg, 2002). Hence, within global value chains, risk and uncertainty are passed downwards, whilst economic rents are passed upwards. This has important implications for labour (Barrientos, 2001a).

The trend to the informalization of work within global export production allows producers to maximise the flexibility of work, and to minimise costs of labour (in terms of remuneration and employment benefits). Informal work describes the status of the employment relationship. The ILO focuses on lack of coverage by regulation, social protection and employment benefits as a key feature of informal work (ILO, 2002).³ The more informal the worker the lower their security of employment, rights, benefits, social protection or trade union organization. Informal workers thus bear a high level of risk and vulnerability within employment (Barrientos and Ware Barrientos, 2002). Today, informal work arrangements are becoming the norm in many export sectors, as the share of secure, permanent, full-time jobs declines throughout the world (ILO, 2002). Informal work is particularly prevalent in export agriculture, which combines advanced processes needed to sustain high quality production with heterogeneous and often informal forms of employment. Goodman and Redclift have argued that whilst farming systems facilitate a degree of organization of the production process, the 'biological production-consumption cycle underpinning this system has imposed distinctive constraints on the technical and social organization of production' (Goodman and Redclift, 1991, p. 91). Seasonality and volatility of production due to natural factors therefore compounds the tendency to informal work and heterogeneity of employment in agro-exports, even where workers are linked into advanced global value chains.

Contract work, is one type of informal work. It involves more than increasing flexibility through the casualization of work, where labour is employed on a part-time or temporary basis directly by the employer. It is part of an 'externalization' of employment, in which work is put out to external contractors or agents (Theron and Godfrey, 2000). This can be done through labour-only contractors that are only responsible for hiring workers, or a contractor who is brought in to complete a specific task (du Toit and Ally, 2001). The

³Traditionally the division between formal and informal forms of working has been denoted by distinct formal and informal sectors. The ILO revised its definition of informal work in 2002, to take account of the significant numbers working in the 'formal' and export sectors without formal legal protection.

third party contractor in the latter case is responsible for both the hiring and payment of workers, and the producer no longer has any direct 'employment' commitment. Contract workers rarely benefit from labour regulation, or receive employment benefits, and their employment is highly insecure. The advantage for producers using contract labour in global value chains is that they are able to meet flexible but tight production schedules set by global buyers, whilst minimizing the costs and contractual commitments of employment. Problems can arise though given the producer is less able to control skill, incentives, commitment or employment conditions of contract workers to meet the quality standards set by global buyers.

3 PRESSURES AND COUNTER-PRESSURES ON PRODUCERS IN GLOBAL FRUIT PRODUCTION

In order to analyse the combined pressures operating on the employment strategies of producers linked to global production, our study traced the linkages through the value chain between supermarkets, importers, exporters and apple producers in Grabouw and Ceres, two key apple producing areas in South Africa. We conducted semi-structured interviews with supermarket buyers and trade agents at every level of the value chain from the UK through to South Africa. We also selected a sample of 18 producers (nine from each area), with a range of different sized farms using different export channels linked to the UK. From these interviews we examined the influences that operated on the producers' employment strategies from complying with government regulation, insertion into competitive global markets, and supplying large UK supermarkets. This is not a representative sample, but a small cross-section through the global value chain.

3.1 Changing Government Regulation

Since 1994, South African fruit has undergone a rapid process of transformation and global integration. The policy of the ANC government has combined the pursuit of export led growth and trade liberalisation (Bhorat *et al.*, 2002), with a policy of social transformation that included the introduction of a range of new legislation covering employment. Lifting of external trade sanctions and the extension of modern production and distribution systems have sustained a buoyant fruit export sector. Internal deregulation of the old single channel marketing system (dominated by Unifrcuo and Capespan in fruit) stimulated a competitive market environment for producers and exporters. South Africa has been able to meet changes in global consumer demand, and the increased demands of supermarkets in the retail of fruit that have transformed export markets, particularly in the UK and Europe, which are the main destination of its fruit. The combined effects of these changes is that South Africa is now integrated into a much more strident, competitive and technologically advanced global horticulture market.⁴

On the other hand the policy of enhanced social equity since 1994, has led to an increase in employment legislation and security of tenure that was previously not applied to

⁴In South Africa total fruit exports accounted for 30 per cent of all agricultural export trade in 1999, when the total value of deciduous exports alone stood at US \$700 million (Deciduous Fruit Producers Trust direct communication, 2000).

agriculture. Some of the most significant legislation concerns unemployment insurance, basic conditions of employment, labour relations and the right to strike action, security of tenure and employment equity (Hamman, 1996). The increase in employment legislation in South Africa distinguishes it from many other developing countries, which were under pressure from international financial institutions to de-regulate their labour markets during the 1980s. Growing employment legislation has stimulated many producers to 'modernise' their labour practices in order to raise labour productivity, and offset higher labour costs, particularly through the use of seasonal labour. It has also contributed to an increased use of informal labour, especially contract workers. Whilst the legislation has clearly benefited formally employed workers, it has not prevented the informalization of work, and these workers lack the benefits of regulation.

3.2 Global Market Conditions

Despite success in positioning itself globally, at the time of our research, there was much talk of a 'crisis' in the South African fruit sector. Downward pressures on producers were clearly coming from market conditions operating within the global economy, reflected in volatile and falling prices internationally as a result of oversupply of fruit onto world markets,⁵ although a devalued Rand from the late 1990s helped to buffer export earnings received by South African fruit growers. Competition has come from increasing supply within South Africa, as well as from growing Southern hemisphere supply from Chile and New Zealand. This has put a downward pressure onto global prices. Europe is the main destination for South African fruit (60 per cent), where at the time of our research South Africa was still subject to import tariffs.⁶ They also face uncertainty in a volatile export market, and have to be able to meet tight production schedules to maximise their advantage. In order to remain competitive, growers are having to find ways of reducing labour costs, and increase productivity.

3.3 Global Value Chain

A third pressure on employment is coming from the need to meet the production schedules and pricing policies of supermarkets, whilst increasing the quality of production and employment standards they set. Producers who were able to access the core of the value chain that supplied UK and European supermarkets were able to obtain more stable outlets for their produce, and on average obtain better prices than those on the open market. Whilst there was often talk of oversupply within the market generally, many agents indicated there was an under supply of higher quality fruit. Accessing supermarket value chains and raising quality of production can help to offset some of the competitive market pressures, but is not an overall buffer. Whilst supermarkets negotiate quantity and quality through pre-programming six months in advance, they normally do not agree price until the time the produce reaches their distribution centres. Supermarket prices might overall be preferential to those in the market, but they change to reflect trends in prevailing market

⁵ Apples have been particularly affected by volatile world prices, the net export realization of apples per ton fell from 2598 Rand in 1995/6 to 1468 Rand in 1998/9, rising back up to 2159 Rand in 2000/1 (DFPT, 2001).

⁶ In future some tariffs will be reduced under the recent EU South Africa trade agreement.

prices, which have been downwards in real terms. If there is an oversupply when fruit reaches a distribution centre, it is not uncommon for quality standards to be applied more stringently and fruit to be rejected at the point of delivery. As a result, any risks of fluctuating market or production conditions are ultimately offset onto growers within the value chain.

Producers supplying supermarkets also had to meet increasingly stringent technical and environmental standards, as more supermarkets require compliance with external certification of standards, particularly EUREPGAP and HACCP, which cover production and environmental standards, as well as their own standards. Growers selling to UK supermarkets also had to meet pressures to comply with employment standards based on the Ethical Trading Initiative (ETI) Baseline Code. This is based on ILO Core Conventions covering labour standards combined with other criteria such as health and safety and wages. It includes compliance with national employment legislation as a condition, which is now fairly comprehensive in South Africa and sets standards above the ETI base code (Barrientos *et al.*, 2003). The application of independent standards within the global value chain reflects the growing governance of large multiple buyers over their suppliers. Those that can provide this 'up-graded' level of production can then attain a preferential supply position compared to their competitors.

Growers are thus caught in a pincer movement between rising quality standards and falling prices. But remaining outside the value chain subjects growers to more volatile markets, where the risks can be even greater. Growers are facing downward pressures on prices through the market channels as a result of increasing supply in a deregulated global sector, a trend that supermarkets were able to take advantage of through their pricing arrangements. On the other hand, growers were facing upward pressures on quality and employment standards through both supermarket requirements within the global value chain, and through increasing employment legislation within the South African economy. These combined counter pressures were reflected in the different employment strategies adopted by producers in our study.

4 CHANGING EMPLOYMENT STRATEGIES AND THE INFORMALIZATION OF WORK

The outcome of these combined pressures in our study is that many apple growers have increasingly shifted away from a predominantly permanent and temporary on-farm labour force (Kritzinger and Vorster, 1996, 2001). Statistics on total employment in the fruit sector are unreliable (particularly if seasonal work is to be included). One estimate based on labour requirements per hectare put the figure at 283 000 in 1994 (de Klerk, n.d.), but it is likely that employment has fallen with retrenchment and rising productivity. The combination of legislation and down sizing of the permanent on-farm labour force has meant that whilst employment for some workers has been 'modernized' with improved pay and conditions, there has also been an expansion of off-farm informal employment. This has led to a much more heterogeneous mix of on-farm, off-farm, and migrant labour, with a noted increase in the use of contract labour.

Working against this trend is the requirement to meet high quality standards in production, to satisfy minimum employment conditions and comply with legislation in order to access the higher value end of the chain.

The result has been a fairly heterogeneous mix of employment strategies adopted by different producers. Some have shifted significantly to the use of contract labour, but others have avoided this option. In our study, we could not identify any clear pattern based on the location of producers within the value chain. Producers have a long history of paternalist employment relations on their farms, and their reaction to modernization of employment through legislation appears to be linked not only to their need to maintain quality output, but also their particular preferences and personal contacts with outside contractors that might facilitate their seasonal labour requirements.

In Table 1 we have divided the producers we interviewed into two groups. Group I is composed of producers that export directly to UK supermarkets, that are able or in the process of meeting EUREPGAP standards, and are financially viable to the best of our knowledge. Group II is composed of producers who do not meet at least one of these criteria, or are in an adverse financial position. In our study, most producers were downsizing their use of permanent on farm labour, either through laying off workers, or through a process of 'natural wastage'. The exception was three producers in Group I who indicated that they are not downsizing their permanent on-farm labour force. All the producers we interviewed used seasonal labour (a mixture of on and off farm) to meet fluctuations in labour needs. Their use of migrant and particularly contract labour was more variable. In total three producers used neither migrant nor contract labour. Eleven producers used migrant workers, but have done so for a long time. Half the producers have moved to the use of contract labour spread evenly between both Groups.

The growing use of contract labour reflects a trend in South Africa resulting from changing employment relations in the context of legislative pressures (Sunde and Kleinbooi, 1999; Theron and Godfrey, 2000; du Toit and Ally, 2001). Contract teams facilitate much more flexible use of labour that can be varied as the season progresses. It allows producers to avoid responsibility under employment legislation, off-set many of the risks of variable production schedules, and reduce labour costs associated with a large stable workforce, whilst meeting the stringent time schedules required within the global value chain. However, not all growers we interviewed wanted to use contract labour. An important constraint on this was the need to maintain quality of output, which contract work does not necessarily assure. A key factor is whether they have established links with contractors who they believe are able to provide both flexibility and maintain quality standards. One producer had used contract workers, but ceased to do so because he was unhappy with the resulting quality and increased crime on the farm. There are inherent risks in using unreliable contract teams, which often have a high turnover of workers (even between the beginning and end of a given week), provide minimal formal training on specific production requirements, and where there is limited worker commitment to the quality of the tasks performed.

We therefore found a mixture of employment strategies both amongst producers able to directly access supermarkets and meet their standards (Group I), as well as amongst those less able to access a better position within the global fruit value chain (Group II). This heterogeneity, is explained in part by the constraints identified by Goodman and Redclift on the technical and social organization of production within agriculture, with producers responding differently to the conflicting pressures to attain quality and address seasonality, risk and volatility of production. It also reflects the embedded nature of traditional employment practices, with individual producers responding differently to the contradictory pressures between maintaining quality and off-setting risk, independently of their position within the global value chain.

Table 1. Summary profile of producers—sample from Ceres and Grabouw

Farm code	Group I										Group II								Total
	4	13	10	1	15	2	16	12	7	9	3	14	8	6	5	11	17	18	
Size (Fruit Has)	B	C	B	D	C	A	B	A	A	B	D	A	C	A	C	A	A	A	
Direct to UK smkts	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	N	N	N	
Standards*	Y	Y	Y	Y	Y	Y	Y	(Y)	Y	Y	(Y)	N	Y	N	Y	N	N	N	
Employment strategy																			
Reducing perm labour	N	N?	Y	Y	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	
Use of seasonal labour	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	
Use of migrant labour	Y	Y	N	Y	N	Y	N	Y	Y	Y	N	N	N	N	Y	Y?	Y	N	
Use of contract labour	Y	N	N	Y	Y	N	Y	N	N	N	Y	Y	Y	N	N	Y	Y	Y	
Facing/in liquidation													?					Y	

Size: A = 0–99 Has; B = 100–199 Has; C = 200–299 Has; D = 300 + Has.
 Note: *EUREPGAP OR EQUIV.

5 IMPLICATIONS OF INFORMALIZATION OF WORK FOR LABOUR

The shift away from permanent workers, to the increased use of off-farm seasonal workers and contract labour is having contradictory results for workers employment and security. We will explore this by comparing the pay, benefits and security of employment of permanent, seasonal and contract workers interviewed.⁷ Given we traced the contractors via the producers, we were aware that we were only likely to be given the details of more regular stable contractors, rather than 'fly by nights' who come and go. We were aware therefore that there was a bias in our sample towards better contractors who were able to give greater security to their workers. However, it was the existence of this type of contractor that allowed producers to use contract labour and maintain quality. A comparison of these contract workers with permanent farm workers therefore revealed some interesting outcomes in relation to the effects on labour of changing patterns of employment.

In terms of income, our study revealed the diverse wage levels received by farm workers (see Table 2). Permanent male workers received on average the highest wages of R298.70, but within this group there was some variability (by category of work and by farm). Those in supervisory or skilled positions (such as irrigation or tractor drivers) received the highest wages up to R812 per week, and the lowest unskilled general farm worker wage we found was R180.⁸ However, the next highest average earnings in our study was not by permanent female workers who averaged R210, but male contract workers who averaged R261 (varying between R150 and R400). The average weekly wage received by female seasonal workers was even lower at R204, and the lowest average weekly wage was that received by female contract workers at R152. Therefore there was a clear gender differentiation in our study between male workers and female workers. Some male contract workers were able to work for up to 12 months per year (the average was 10.5) and earn a better average wage than female workers (permanent, seasonal or contract). In contrast women seasonal and contract workers in our study were amongst the lowest paid, and worked the shortest periods of the year.

Being a contract worker did not therefore automatically put a (male) worker in the lowest income category. But compared to permanent (and many seasonally) employed

Table 2. Average pay levels according to status

Level	Status	Gender	Average months worked	Average R weekly earnings	Highest individual wage	Lowest individual wage
Farm	Permanent	Male	12	298.70	812.50	180.00
		Female	12	210.60	320.00	130.00
Contract	Seasonal	Female	7	204.10	320.00	112.50
		Male	10.5	261.25	400.00	150.00
		Female	9.3	152.75	180.00	125.00

⁷As part of our methodology, we traced a cross section through the value chain from supermarkets through to 18 producers. We then interviewed over 40 of their workers, from different categories of employment (permanent, on-farm, off-farm and migrant). From the producers we then traced 8 contractors that are regularly used on the farms in our study, with whom we also carried out semi-structured interviews, as well as 16 contract workers who regularly work in those teams.

⁸1 Euro = R10.32.

workers, contract workers have little or no access to the benefits and protection provided by labour legislation.⁹ Theron has argued that, although 'permanent' is not a category of employment that is explicitly acknowledged in South Africa's labour legislation, the protection that legislation provides is nevertheless premised on the 'permanent job' (Theron, 2001). Even though male contract workers can earn a higher income than permanent female workers, they receive none of the benefits that are available to permanent (and many seasonal) workers. These can include, Unemployed Insurance Fund (UIF), paid holidays, contribution by farmers to medical expenses, free housing, free electricity and water and other benefits not specified by legislation. Given they pay no UIF, contract workers receive no unemployment payments when they are out of work. In this situation, they have a much higher vulnerability to poverty due to unemployment or childbirth than other categories of workers with more formal employment status that do receive such benefits.

Insecurity and vulnerability on the other hand characterised contract employment given there is no formal guarantee of work from day to day, and contract workers have no written agreements with their contractors. Many contract workers experienced difficulties in coping with insecurity of employment. Women appeared to be less confident and are often nervous and anxious about doing contract work, men appear to be more confident about their employment. They tend to rely on their special skills to cope with employment insecurity. However, those male contract workers who had succeeded in establishing themselves as core team members viewed themselves as having a long-term relationship with their contractors, similar to 'permanent' employment status. Security is greater when workers succeed in remaining with one contractor and are able to follow this contractor from one farm to the other or are able to work for one contractor on one farm only. For contract workers employment security also relates to having a 'good contractor'. Workers tend to trust their respective contractors to secure contracts with producers in order to guarantee employment. Some men also prefer doing contract work because it promised independence and greater control over their work lives and because it provides opportunities to increase their income.

6 CONCLUSION

Global integration is leading to contradictory pressures working through the combined effects of global value chain, competitive markets and government legislation. To access higher economic rents and maintain stability, growers need to supply global value chains. But this does not immunise them from the effects of the competitive markets, and supermarket buyers are increasingly requiring adherence to employment standards and legislation. To succeed growers simultaneously need to reduce relative labour costs and offset risks, whilst raising quality and employment standards. These pressures are leading to a downsizing of permanent labour, with increasing dependence on informal contract labour by some growers. But this trend is tempered by the need to address quality and raise labour standards, leading to heterogeneous employment strategies adopted by different producers.

⁹Under recent South African legislation, if contractors register with the Department of Labour a number of their workers can then have access to UIF and workers compensation, but respondents in our research indicated that few labour contractors in the fruit sector do so.

The increased use of flexible and especially contract labour is intensifying the informalization of work within the fruit sector. But for male contract workers this does not automatically mean receiving the lowest wages or length of employment. Those with links to regular contractors are able to do well relative to women farm workers of all categories. But despite this, none of the contract workers in our study had a contract of employment, or received any social insurance or employment benefits. The pressures on global production combined with national legislation are having mixed effects for workers in the South African fruit sector. For male permanent workers and even some male contract workers, the wages are good relative to female workers, and especially female contract workers. But no contract workers have formal security of employment or receive employment benefits. The informality of their work puts them in a vulnerable position, and even where individuals earn more, all contract workers are exposed to an intensified risk of poverty.

The tenets that we have highlighted in this paper are the inter-related yet contradictory global and national pressures which on the one hand drive down labour cost and contribute to the growing informalization of work, yet on the other hand increasingly require higher quality and employment standards. However these two contradictory pressures do not necessarily affect different groups of workers separately, rather there is an inter-play between them, with mixed results for informal work linked to the export sector. From the standpoint of workers, this interplay is reflected in different pressures operating simultaneously in relation to incomes and security of employment. The result is that *both* gains and losses from global integration can be experienced simultaneously by the same groups of workers linked to global exports.

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