

## 1 Introduction

Gender is an important aspect of global value chains that is often overlooked in their analysis. At opposite ends of buyer-driven value chains, gender has played a significant role in both production and retail, as examples from a variety of case studies show. Many factories across the developing world that produce brand-name goods for large global companies employ large numbers of women workers. They have taken advantage of existing gender relations to furnish a labour force capable of producing high quality products cheaply for global export. At the other end of the chain, evolving trends in consumption and buying are linked to changing gender patterns of employment and higher female labour force participation. Marketing companies adopt gender-based strategies in their campaigns to sell high value goods. Similarly, in global food value chains, female employment in production plays an important role in ensuring the year-round provision of goods in our supermarkets; whilst the supermarkets target dual-worker households on higher joint incomes, where women have less time to cook, in order to sell ready prepared produce with a high mark-up. Gender is thus integral to the functioning of these global value chains.

A significant contribution of value-chain analysis is its ability to encompass all aspects of the process of production, distribution and retailing across global supply networks. These networks are socially located and involve both men and women at all points of their activity – as technicians, workers, managers, company owners and marketing agents. The gender relations underlying these activities can have an important influence on the way value chains function. Conversely, in localities where they are operating, value chains can have an influence on the gender division of labour. The analysis of value chains needs to incorporate gender as an essential element if their functioning is to be fully understood. This article provides an initial contribution to this research agenda. Its focus is on the employment and retail ends of a buyer-driven chain, using the horticulture value-chain linking Chile and South Africa to Europe as a specific example. However, this is just one aspect in analysing gender and value chains, which to be comprehensive would require an examination of the role of gender at every node of the chain.

# Gender, Flexibility and Global Value Chains

**Stephanie Barrientos**

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The article will start by exploring how a gender dimension to the analysis of global value chains could be developed at a conceptual level. It will then draw on existing empirical work to examine the role that flexible employment, much of it female, plays in the functioning of value chains. Using examples from export horticulture it argues that the prevalence of female employment at specific nodes in the chain plays an essential role in facilitating flexible sourcing and distribution of high quality goods. This form of employment can also play an important function in acting as a buffer against insecurity and risk for those producers at the weakest points of the chain relative to the large global buyers. Finally, the article argues that a gender approach provides an important dimension to the analysis of value chains linked to the point of retailing and consumption. Again, using the example of food, it helps to analyse the upgrading of value-added activities through the marketisation of aspects of reproduction traditionally undertaken by women. It explores how changing consumption and retail patterns can affect global value chains, with implications through the chain affecting gendered employment in production. Overall, therefore, a gender approach helps to broaden out the analysis of global value chains, increasing the ability to examine *all* activities that can come within their range.

## **2 The Importance of a Gender Approach to Global Value Chains**

A gender perspective is essential to a full understanding of global value chains in that it helps to provide an integrated qualitative framework for analysing the totality of production, distribution and consumption within a globalised economy. 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 1998:13). In a globalised economy, with rising levels of female employment, both men and women are actively involved in economic activities along value chains. Gender thus forms an integral element in how each of these activities is performed, and their inter-connections from conception through to the final stage of consumption.

A value-chain approach incorporates analysis of the network of agents that facilitate the range of activities supplying commodities along the global chain. Economic agents can be grouped broadly into producers (entrepreneurs), managers and workers. These agents are not isolated technocratic individuals; they come from particular gender and social backgrounds, which affect their form of integration. An examination of the networks of agents within the context of the socio-economic environment in which they operate, allows an analysis of the interlinked gender relations at any node of the value chain. A full analysis needs to consider 'variation in individuals' access to (and exclusion from) particular fields of productive activity' (Joeke 1999:1) based on gender and social origin. This can help to understand at a more integrated level gender differentiated roles and rewards within the value chain. Analysing the interaction between the gendered network of agents, their socio-economic background and the more 'technical' operation of the value chain provides an essential avenue for understanding the total functioning of the chain.

Linked to access to the chain are the differentials in the relative rewards and opportunities for upgrading human capital at different points within the chain. As Joeke (1999) points out, this affects men and women in different ways, both as workers and as entrepreneurs or managers. This necessitates a more subtle understanding of where gender inequality in rewards and training is greater and less. It raises the issue of what are the processes and pressures in terms of the functioning of the chain that allow women to earn higher rewards (occasionally greater than men) in one activity, or node, relative to another. Through this we can begin to unpack the nature of women's employment or managerial positions relative to men's: why women are concentrated at particular points of the chain and men at others; why women receive particular wage rates or rewards; and what opportunities are available to women relative to men for improvement. This also has policy implications in terms of strategies to combat gender inequality and enhance women's access to upgrading their skills and rewards.

A gender approach also facilitates a better understanding of how activities are divided up

along the chain. It can help understand the way entrepreneurs at different points of the chain gain access to an additional 'economic rent' (Kaplinsky 2000) over and above normal competitive profits. For example, producers may find that the casting of one particular skill or function as 'feminine' allows recruitment of women at lower labour costs or with higher productivity than men, enhancing economic rent (Joekes 1999). The subsequent gender segregation could become embedded if all producers implemented a similar gender pattern of employment, but the search for new forms of economic rent through recasting gender roles could continue elsewhere in the chain with complex or even unexpected gender outcomes.

Governance is another critical area of analysis within value chains (Kaplinsky 2000). Much of the focus is on the 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. Joekes (1999) shifts the focus of analysis of these issues onto gendered power relations. Women normally occupy a subordinate position relative to men within power relations, which can be replicated within the functioning of global value chains. If governance is linked to the power of one firm over another, it might also be linked to women's concentration in particular types of firm relative to others within the value chain. Governance in value chains takes place not only between firms, but also within firms. The power to govern upgrading activities in a context in which women occupy a subordinate position in the gender hierarchy within the firm can facilitate the enhancement of economic rents as discussed above.

A gender approach helps to unpack in more depth the ways in which value chains operate at different levels. This is particularly in relation to (i) how networks of agents and individuals gain access to the chain as employees or entrepreneurs, (ii) opportunities for upgrading within the chain, (iii) the role of gender inequality in gaining economic rents and (iv) facilitating different forms of governance. Conversely, a value-chain approach can help in assessing the gender division of labour, and how this is affected through the operation of the chain. In the following section I will explore this by focusing specifically on employment, particularly within the horticulture sector, and attempt

to draw out some initial linkages with a gender approach to value chains identified by Joekes.

### **3 Why Flexible Employment is Important in Horticultural Value Chains**

There is a high incidence of female employment in the types of buyer-driven commodity chains identified by Gereffi (1994; Gereffi and Korzeniewicz 1994). Much of the research on female employment is based on case studies of export processing in different sectors and countries.<sup>1</sup> Various explanations have been advanced which help our understanding of the reasons behind the 'feminisation' of this employment. These have been linked to employers' perceptions of 'women's work', and a general increase in the use of flexible labour as a means of reducing labour costs, in which female employment is often concentrated. An additional aspect, which has received less attention, is the way flexible employment facilitates the operation of value chains in a global economy where there are high levels of uncertainty and risk. A gender perspective in the analysis of global value chains can help to understand the ways in which this functions. We will explore this, using specific examples from the global fruit chain linking Chile and South Africa.

Female employment is usually concentrated in labour-intensive activities, where both dexterity and labour costs are significant factors. In an early study, Elson and Pearson (1981) showed that employers often had a preference for women because of their perceived 'nimble fingers', needed to handle more delicate labour-intensive work involved in modern export production processes. Another important factor in the feminisation of labour-intensive employment in an increasingly competitive global economy is the trend to use flexible employment as a means to drive down labour costs. Standing (1989) has shown that the increased use of flexible labour not only allows employers to reduce wage rates, but also to reduce non-wage costs such as social insurance and other benefits. Flexible working has increasingly displaced formal permanent employment, which was usually predominantly male. It has provided an important route to the increasing 'feminisation' of the labour force, although men are also being shifted

Table 1: Estimated deciduous fruit employment in Chile and South Africa

	Chile (1993)	South Africa (1994)
Permanent employment (% female)	49,290 (5%)	102,000 (26%)
Temporary employment (% female)	287,440 (52%)	181,000 (69%)

Sources: Barrientos *et al.* (1999a); Kritzinger and Vorster (1995, 1996)

increasingly into flexible working. Women have often been deemed more compliant and accepting than men with regard to the poorer employment conditions linked to flexible employment. This has partly been because women traditionally had lower levels of labour-force participation than men, with less experience of formal employment or traditional union organisation. Poverty and structural adjustment have also led more women to seek paid work, as households could no longer survive on male earnings alone in a liberalised flexible labour market.

Within export horticulture, these factors have played a role in explaining the high levels of female employment. Chile and South Africa are the two main exporters of deciduous fruit to the northern hemisphere during the months of December–March each year. As shown in Table 1, there are high levels of female employment in their fruit export sectors. In both countries, men are concentrated into permanent employment, of which 95 per cent are male in Chile and 74 per cent in South Africa. In contrast, women are concentrated in temporary, casual and seasonal jobs, of which women constitute 52 per cent in Chile and 69 per cent in South Africa. In other words, women form the core of the ‘flexible’, and men the core of the ‘permanent’ labour force. Women are seen as a cheap and compliant labour force by employers, drawn into work at the height of each season.

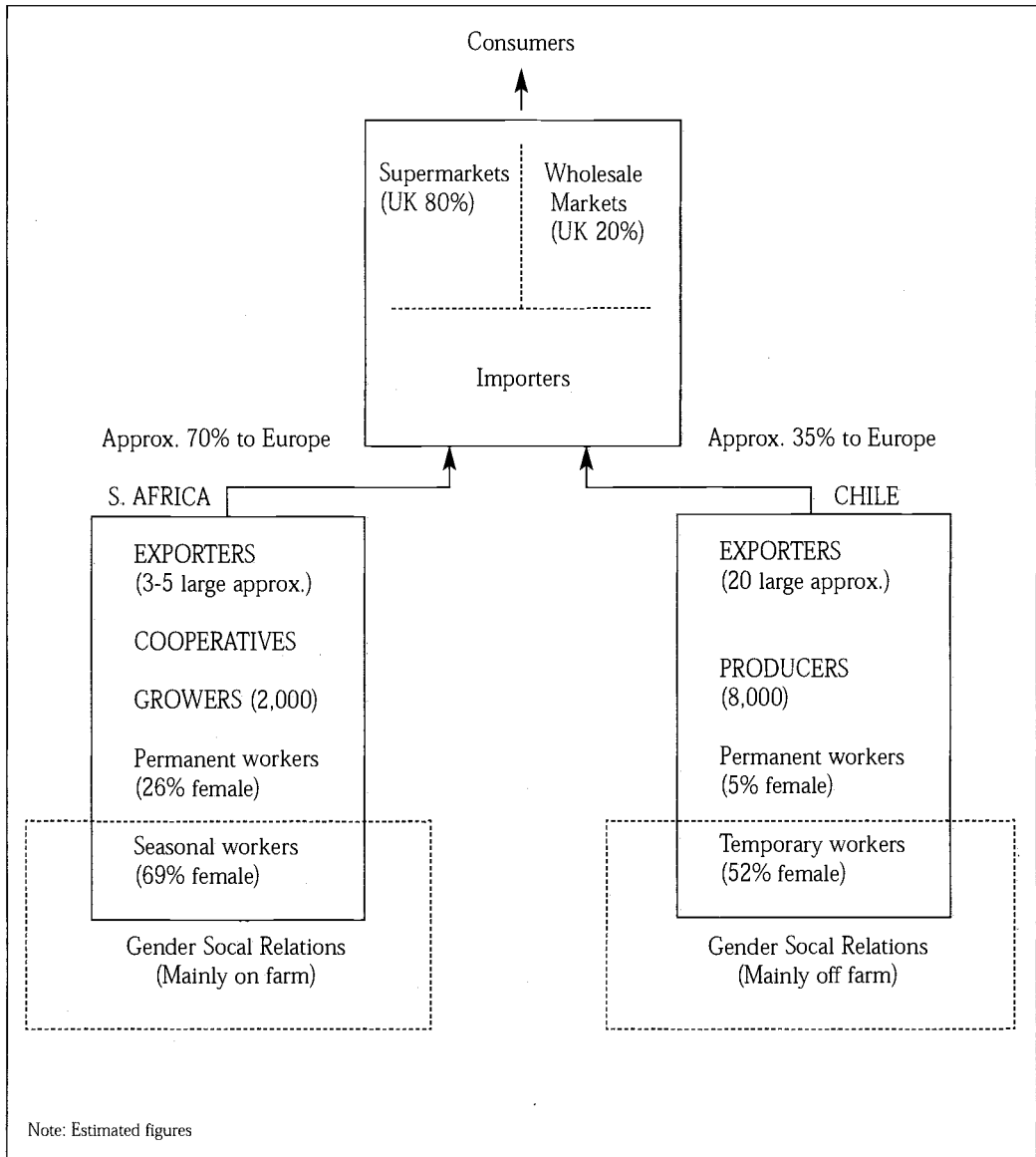
Employers’ perceptions of women’s dexterity, compliance and flexibility are clearly important factors in helping to explain female employment in labour-intensive buyer-driven value chains. But these explanations are only focused on explaining

one element in the overall value chain: the direct relationship between employers (usually suppliers upstream within the chain) and their employees. Another aspect of this relationship is the pressure employers themselves come under as a result of their positioning within the value chain. Crucial to the functioning of global buyer-driven value chains is the ability of suppliers, often in developing countries, to balance conflicting pressures: low prices with high quality output and consistency of supply. The consistency of supply relates to the ability to meet orders continually with minimum quality failure, and is often associated with ‘just in time’ production systems, where orders may vary from week to week or even day to day. Flexibility of supply sources can also mean that buyers shift from one producer or supply location to another at short notice.

### 3.1 Governance within the horticultural value chain

Flexible employment thus takes place at one end of a global horticultural value chain, which is increasingly driven by the demands of global supermarket buyers at the other end. An example of the links between flexibility of employment and supply is provided by the deciduous fruit chain linking Chile and South Africa to the European market, as shown in Figure 1. Chile is the larger producer, but ships a smaller percentage of its fruit to Europe than South Africa. Both export homogeneous fruit varieties (particularly grapes, apples and pears), and once they reach their destination there is little to differentiate the fruit. Increasingly the retail of fruit (and all other food) in Europe is dominated by supermarket chains (or ‘multiples’). This is particularly so in the UK, where

Figure 1: Overview of global value chain – South African and Chilean deciduous fruit



multiples are the direct recipients of approximately 80 per cent of fresh produce, only 20 per cent going via the more traditional wholesale markets. The supermarkets usually have direct links with preferred importers and are increasingly moving to a 'single category management' system, with a small number of agents handling their year round requirements from across the world.

The production and export networks in Chile and South Africa that supply these markets are, however, more diverse. In both countries, an important aspect of the relationship between exporters and producers is their relative size and power within the value chain. Relatively centralised export companies, some with a dominant market position, global linkages and information, relate to a large number of relatively fragmented local commercial producers. Local networks between producers and exporters play an important part in maintaining supply arrangements. However, growers are very dependent on the export companies for access to northern markets. The position of dependence has also been reinforced by the increased dominance of multiples within the value chain. Individual growers are relatively powerless, and given the competitive market have to accept the terms and conditions offered if they want access to northern multiples (Barrientos *et al.* 1999a, 1999c).

In addition to this, growers are operating at the point of the value chain where the risks from agricultural production are highest. Many growers do not have the benefit of a minimum price guarantee, and even if they do, all growers are subject to a volatile pricing system on the international markets. Growers have to make significant investments in modern technology and new production methods to sustain the high quality levels demanded in the global fruit market. Growers are often squeezed in their returns, and their portion of the value of the final price is relatively low compared to other sectors of the value chain. Despite the use of modern technology, production still remains subject to the vagaries of weather, pest or disease. A crop does not have to be destroyed, only slightly damaged or of poor quality to lose its potential value added, based on the high standards of global export. Within Chile and South Africa, it is the growers who bear these risks and who suffer

the most when adverse conditions prevail. This is important to understand, because the only group remaining at the base of the value chain, onto whom the growers themselves can offload some of the risk, is the fruit labour force, and particularly the more flexible seasonal workers, where the highest levels of female employment are found.

The flexibility of female employment in South Africa and Chile does not just occur because women are mainly seasonal workers. In Chile, which has a more productive off-farm temporary labour force than South Africa, women are often paid on piece rates which can vary during the season, their hours of work can vary from one week to another, and many move between employers as the season changes. South Africa has a more traditional farming system, where many women live on-farm working on a casual basis as part of their partner's contract. But there is a move to shift workers off-farm, and introduce more 'modern' employment practices such as found in Chile, which would increase the flexibility of both male and female employment in the sector. Variable piece rates are more predominant in packing houses, where women are concentrated because of their perceived delicate handling of the fruit, than in field work, where men are more predominant. These types of flexible wage systems play an important role in raising productivity of workers, enhancing the economic rents that growers are able to extract from their more flexible workers. Flexible wage rates also allow producers to reduce labour costs, acting as a defence when the larger more powerful buyers drive prices down to enhance their own economic rents.

The nodes within global value chains where cheap flexible female labour plays a crucial role are therefore linked up to governance issues within the chain. Governance is linked to the ability of some firms (dominant buyers) to control activities along the chain in ways in which they can extract economic rents over and above other firms. This is not a one-off relationship, but is usually linked to complex hierarchies of power relations between firms along the chain, especially where networks of suppliers and subcontractors are involved. Firms in the weakest position within this hierarchy, especially upstream firms in developing countries who have least security as a result of the flexibility

of supply agreements, are often those most likely to use flexible female labour to help them meet the volatility of supply. These employers use flexible labour as a buffer against the risks of price fluctuations and reductions, or the risks of volatile supply. Flexible employment also provides a hedge against large buyers shifting to other producers or supply locations. Producers offset the risks they incur onto their employees, who are often female. In this respect, the governance structures of global value chains create a hierarchy of power relations between firms that is replicated in a gender hierarchy of employment. As noted, men are concentrated in the smaller number of permanent jobs, women in the larger number of flexible jobs. Flexible female labour is thus often located in particular nodes of the chain where the governance and power of individual firms is weaker, acting as a buffer against insecurity and risk.

### 3.2 The socio-economic context

The gendering of this labour force is linked partly to the factors discussed above: employers' perceptions of women's skills and compliance and their lower levels of traditional formal employment or union organisation relative to men. But integral to this is the socio-economic context and gendered social relations that frame employment. The gender division of labour in most societies is based on men being the primary income earners, and women taking primary responsibility for domestic and childcare activities. As women enter the labour force they usually combine productive work with their reproductive activities. There is often a 'social acceptance' of women as flexible workers, carrying the burden of multiple roles. Rising female employment, and the fact that much male employment is also increasingly insecure, is putting pressure on the more 'traditional' gender division of labour. But at the same time, the requirement of global production that this workforce is temporary helps to maintain the prevailing gender division of labour. Because of their ties to the household, it is deemed 'socially acceptable' that women can be drawn into employment for one period, to return to their 'household responsibilities' the rest of the year. Given their concentration in the seasonal labour force, women have little opportunity to upgrade or advance in their work. It is the predominantly male workers who have most access to training, supervisory and managerial positions, giving them

greater opportunity for advancement and upgrading of their human capital. Thus women remain locked into their roles as temporary seasonal labour. The operation of the value chain partially affects gender roles through the creation of employment, but simultaneously helps to reinforce the prevailing gender division of labour because of the inherently limited length of that work.

The way in which global value chains engage with gendered social relations to facilitate their operations is not necessarily homogeneous. It can vary from one social context to another, taking different forms because of variations both in local circumstances and in the requirements of the chain itself. An example of this is provided by Figure 1, where the global fruit value chain is linked to different socio-economic conditions in Chile and South Africa. For historical reasons, most temporary workers in Chile live off-farm in local villages, towns and even cities. In South Africa different circumstances led to the core of the labour force (permanent and casual) living on-farm, supplemented by migrant African labour during the season – although this is changing in the post-apartheid era with a trend towards off-farm labour (Sunde and Kleinbooi 1999). These different contexts have also affected women's position relative to men within the labour force, with a relatively larger female permanent labour force in South Africa and Chile, as shown in Figure 1.2 Yet despite variations in the social contexts that frame the gender structure of employment, out of each country comes a homogeneous product that is undifferentiated at the consumer end of the chain. The fruit value chain thus adapts 'chameleon-like' to local circumstance in facilitating its global operation.

A gender analysis of the chain helps to reveal the subtleties and contradictions of the interaction between global processes of production and more traditional gendered social relations that may vary from country to country. Although global value chains themselves generate homogenous products, the way they interact at local levels can vary according to specific socio-economic and commercial circumstances. This is particularly so when gender is taken into consideration, as the previous example shows. Forms of inclusion in or exclusion from a specific global commodity chain

for women relative to men are not necessarily the same in different countries or sectors. Changing employment patterns and household livelihood strategies linked to value chains in a global economy are also in turn affecting gendered social relations within each location.<sup>3</sup> Global value chains engage with gendered social relations not only at the production but also at the consumption end, with linkages at different points along the chain.

#### **4 Consumer End Of Value Chains**

The analysis so far has concentrated on upstream employment amongst suppliers within global value chains. For a more comprehensive analysis of gender and value chains it would be necessary to consider the gender dimension of different nodes all along the value chain – within distribution, marketing, design and retailing, and at different levels of the labour force, management and ownership of firms. Much of this research has yet to be done, and Joeke's (1999) conceptual overview remains one of the main contributions on these issues. However, comparative research on employment at both ends of the horticultural chain linking Chilean fruit exports to UK supermarkets has highlighted some further aspects that can be developed in an analysis of gender and global value chains.<sup>4</sup> A global value-chain analysis provides a framework for analysing all aspects of production, distribution and marketing through to final consumption, and a key element within this is the way gender informs these interlinked processes in a globalised market.

Within horticultural production (along with much other food processing), levels of female employment are often high. This generates homogeneous products that travel along the chain into supermarkets, which are increasingly the main buying agents at the end of the chain dominating food retailing (Dolan *et al.* 1999). Supermarkets have undergone a major transformation over the past decade or more, with an important gender dimension. As female employment has risen generally in Europe, households have become increasingly dependent on supermarkets providing processed and semi-processed products that can be easily cooked or reheated with little preparation (Goodman and Redclift 1991). Fresh produce fits

into the broad range of convenience food that can be easily prepared (or is sold semi-prepared, cut, sliced or mixed), but also has good nutritional value for health-conscious consumers.

Supermarkets are, therefore, increasingly 'marketising' functions linked to the preparation of food, that were traditionally undertaken by women as part of their reproductive activities within the home. They are able to add a high mark-up on processed foods and convenience foods that have high retail values, especially non-brandname goods, which they sell under their own label, including fresh produce. Economic rents are thus generated as a result of changing patterns of household employment and domestic responsibility. Supermarkets and the companies whose products they sell are conscious of the gender of their customers, whom they target in their advertising and marketing activities. The consumption end of global food chains thus has a clear gender dimension, which allows supermarkets to extract an economic rent and increases their power within the global food chain. Global food value chains are increasingly extending from productive into reproductive activities, as the latter activities are drawn into the market sphere.

Another major change has been the advent of 24-hour opening by supermarkets. Again, this increases convenience to households with multiple income earners, who might often be working flexible hours. Much of the service provided by supermarkets to their customers is facilitated by the employment of a large female labour force, a significant proportion of which works part-time or flexible hours (Neathey and Hurstfield 1995). This allows supermarkets to vary their levels of employment at different hours of the day, or on specific days or holidays, to meet fluctuations in customer throughput. The pay and conditions of part-time workers in UK supermarkets are normally much better in absolute terms compared to flexible workers hired by suppliers upstream in the chain. But the flexibility of the labour force still allows supermarkets to minimise labour costs outside peak times, whilst maintaining a high level of customer service at all times. Women have long been concentrated in the service and retail sectors (Scott 1994), and there is a 'gender stereotyping' to this work. But many are drawn into this expanding area



of flexible employment, as it allows them to combine paid work with household responsibilities and maintain their own family incomes (Barrientos and Perrons 1999b).

The use of flexible female labour to facilitate the functioning of global value chains is, therefore, not limited to the supply segment of the chain. It can play a role at different points of the chain, for different reasons. In every country there are differences in the socio-economic context, which will also affect the local form of interaction between the chain and the ways in which women are able to gain access to (or be excluded from) the value chain. This underlines the diversity in the gender dimension to global value chains that can be found at different nodes in the chain, all the way through from production to consumption. Changing consumption patterns themselves are gendered, and buyer-driven global value chains permeate these changes in ways that allow them to increase economic rents and the precision of their operations at varying nodes and in different locations. Meeting changing consumption patterns will have knock-on effects throughout the chain, in terms of the marketing, sourcing and production decisions that are consequently made. These decisions can then directly affect employment at the production end, much of which is female. A gender approach to value-chain analysis, therefore, provides an important framework for exploring linkages between different nodes of the chain, and is central to a better understanding of the functioning of the chain.

## 5 Conclusion

The aim of this article has been to highlight that a gender analysis is integral to the understanding of global value chains. This aspect of value-chain analysis is only in the early stages of conceptual development, and much of the empirical work available relates to case studies on female employment in buyer-driven export sectors. Drawing on studies from the horticultural export sector in the South, and linking them to changes in retailing and consumption patterns in the North, we can see that there are integral linkages between gendered social relations within different countries and the processes of globalisation.

Buyer-driven value chains are an expanding part of globalisation. They result from processes of trade liberalisation and labour-market deregulation, but also reflect changing linkages between global production and consumption, with large buyers increasingly dominating economic activity through their governance of the chain and extraction of economic rents. Simultaneously, globalisation has seen significant changes in the roles of women in the South and North. Women's labour-force participation has risen in most countries. Women are being drawn in large numbers into flexible employment, which is central to the flexible functioning of value chains at both the production and retailing ends.

Rising female employment has had important implications for consumption and retailing patterns, primarily in the North but also in the South. Increasingly activities that were previously undertaken within the home are being marketised. Large retailers now provide one-stop or Internet-based shopping facilities for households with multiple occupations and little time to shop. They target their marketing of high value added goods on higher earners in particular, which are often multiple income households. The same retail companies have also increased their dominance along the buyer-driven value chains through which they source their goods globally. They are able to exert their powerful position through governance of the chain and extract economic rents through upgrading activities that facilitate the sale of higher-value-added goods. Flexible global sourcing allows them freedom to maintain high quality, drive down prices and meet changing consumer needs. Changes at the consumption end of the chain have knock-on effects throughout the chain. Producers who are in a weak position relative to the large global buyers often bear the costs of changing production requirements or sourcing decisions. These can then have direct implications for workers at the other end, whose flexible employment (where female labour is concentrated) acts as a buffer for the producers against the risks and insecurity of global supply.

A gender approach is thus central to a full understanding of the functioning of global buyer-driven value chains. It provides an essential framework for analysing the more technical

operations of the chain and the network of agents that facilitate the chain. A gender approach requires the positioning of value-chain analysis within the socio-economic context in which value chains are embedded in different countries. These can be diverse and complex, as value chains interact with gendered social relations at a local level in different ways. At some levels the operations of value chains can help to change, at other levels to reinforce the prevailing gender division of labour. But the ability of buyer-driven value chains to produce homogeneous global products that sell for a high value on global markets arises from their ability to adapt to changing gender relations as an integral part of the functioning of the chain. The strength of a value-chain approach is its aim to analyse all aspects of design, production, and marketing through to consumption, but the totality of that analysis can only be achieved if gender is included as an integral part.

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## Notes

1. Many of the early case studies in this area focused specifically on rising female flexible employment, although there is recognition now that men have also been affected by increasing flexibility of work.
2. There is insufficient space to explore these differences in this article. For more detailed discussion of each country see Barrientos (1999a, 2000).
3. The focus of this article is on the functioning of the value chain itself, but the implications of globalisation for changing gender social relations and the household division of labour is another important dimension which cannot be explored here. For further exploration of this aspect, see for example, Barrientos (1999a, 1999b) and Wilson (1985).
4. This section draws on research undertaken jointly with Diane Perrons, see Barrientos and Perrons (1999b).

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