

## Module 1: Introduction to global supply chains

### Learning objective

At the end of the module, participants will be able to:

- Appreciate the complexities of global supply chains.
- Consider how these can offer both opportunities for and challenges to the creation of decent work for women and men.
- Visualize the different stages and players involved in one supply chain.

### Module contents

One briefing:

- Briefing 1 – Global supply chains

Two case studies:

- Case Study 1.1: Global garment industry
- Case Study 1.2: The horticulture and cut flower global supply chain

Two learning activities (in Part C, electronic version):

- Learning Activity 1.1: Following the dress
- Learning Activity 1.2: Following the flower

### Target audiences

This module will particularly interest representatives from:

- Lead global companies (e.g. brands and supermarkets)
- Multi-stakeholder initiatives and CSR stakeholders
- Multi-lateral organizations
- Employers' organizations and trade unions at local, national and international level
- Global and national NGOs
- International development planners
- National institutions responsible for employment, economic and trade policies
- National institutions responsible for gender equality and women's issues

## Briefing 1 – Global supply chains

The briefing describes global supply chains and presents how they offer both opportunities for and challenges to the creation of decent work for women and men.

### Summary of key points about global supply chains and decent work

- The global trend to outsource production has led to the fragmentation of responsibility for worker welfare; increasingly, brands and supermarkets no longer have a clear employment relationship with the people who make their goods.
- While a factory is the legal employer of workers, the decision-making power and most of the wealth in a supply chain often lie with the brands at the head of the supply chain.
- Retailers and brands may use multiple suppliers, making it difficult for buyers and suppliers to work together to improve factory or farm production processes.
- Many supply chains have short production cycles and exert strong downward pressure on pay and conditions because lead companies have demanding price targets and delivery times.
- The garment sector has an especially complex supply chain and is made up of thousands of brands, retailers and suppliers around the world.
- Workers on the lowest rungs of global supply chains have little ability to negotiate their conditions of employment – there are low levels of union organization in many industries, such as in apparel.<sup>1</sup>

<sup>1</sup> Apparel refers to the production of clothing, footwear and accessories for consumers. Production involves a variety of tasks including cutting and stitching textiles, where workers often perform only one task in the production process. Producing one garment, for example, can involve several factories, often resulting in each factory taking one separate task to produce the finished garment.

## 1. Introduction

*“One of the key characteristics of the global economy is the increasing fragmentation of production into different activities and tasks along global supply chains, with profound socio-economic impacts.”*  
(OECD et al., 2014)

Today many large retail and brand companies – in sectors such as garments, footwear, agriculture, food and electronics – produce their goods through a business model of global outsourcing to factories and farms worldwide. Increasingly goods are produced through global supply chain networks spanning different continents. Companies, suppliers and workers are an integral part of globalized trade, production and employment. Global supply chains depend upon new technology, trade liberalization and capital mobility, and are facilitated through cheaper trade and transport costs and improved global communications networks.

There is a trend towards market power forcing down prices and demanding flexibility. Tight margins mean costs and risks often are passed onto the workers. Workers hired on short-term or seasonal contracts are expected to meet excessively tight targets and work very long hours. Production pressures contribute to the prevalence of poor working conditions that do not meet international labour standards or national laws.

## 2. Understanding global supply chains

A supply chain is made up of all the stages involved in the production and sale of a specific product. (Christian, Evers and Barrientos, 2013) The chain follows the product from its source as raw material to its final destination in a shop or warehouse. Global supply chains have become commonplace in many industries over the past 30 years. Under such systems the design, marketing and sales work is generally carried out in the wealthy economies of Europe, North America and Asia, while the manufacturing of goods is largely carried out in ‘developing’ countries in Asia, Africa and the Americas. The links in the

supply 'chain' are all the steps that begin with growing or extracting raw materials (cotton, iron, oil, etc.) and end with the sale of the finished products to end users by the company at the top of the supply chain – often called the 'lead' company. Regional value chains are also gaining growing importance, particularly in South America and in Africa – e.g. Chile or Brazil exporting agricultural products to neighbouring countries.

In some industries, the lead company (or a subsidiary) owns some or all of the links in the supply chain. This often happens when quality control is very important, or the lead company has developed special manufacturing processes that they do not want competitors to access. In these kinds of supply chains, it is easier to identify the lead company as ultimately responsible for the welfare and rights of workers.

### What is a supply chain?

The term "global supply chains" refers to the cross-border organization of the activities required to produce goods or services and bring them to consumers through inputs and various phases of development, production and delivery. This definition includes foreign direct investment (FDI) by multinational enterprises (MNEs) in wholly owned subsidiaries or in joint ventures in which the MNE has direct responsibility for the employment relationship. It also includes the increasingly predominant model of international sourcing where the engagement of lead firms is defined by the terms and conditions of contractual or sometimes tacit arrangements with their suppliers and sub-contracted firms for specific goods, inputs and services. (ILO 2016, p.1)

**Chart 1** presents a simple supply chain model where the lead company either owns each stage of the supply chain or they know who the suppliers are.

But many supply chains can be very complex. A typical global supply chain is complex, multi-layered and involves a wide range of organizations, suppliers and stakeholders.

For example, garment supply chains are often seen as being simple, although in practice they are not. In industries, such as garments, the lead companies – sometimes referred to as 'brands' – do not own any factories. The lead companies 'outsource' all production to independent factories. They may change suppliers from factory to factory each season, looking for lower prices or special skills. If lace shirts are in fashion one season and denim the next, brands source from a lace factory one season and a denim factory the next.

Lead companies engage in global supply chains in both direct and indirect ways, which often results in complex relationships or 'arm's length' relations with the suppliers. (Meixell and Gargeya, 2005) Direct relations are formed through foreign direct investment, purchase of a specialist supplier or by establishing a new production facility in another country, where the task that is performed abroad remains within the ownership of the lead firm. However, increasingly, these tasks are carried out through outsourcing. This creates a contract relationship with an independent supplier, which can also occur indirectly, through the purchase of a production input from a domestic supplier that, in turn, receives some of its inputs from abroad.

This complexity of the global supply chain in garments is shown in Chart 2.

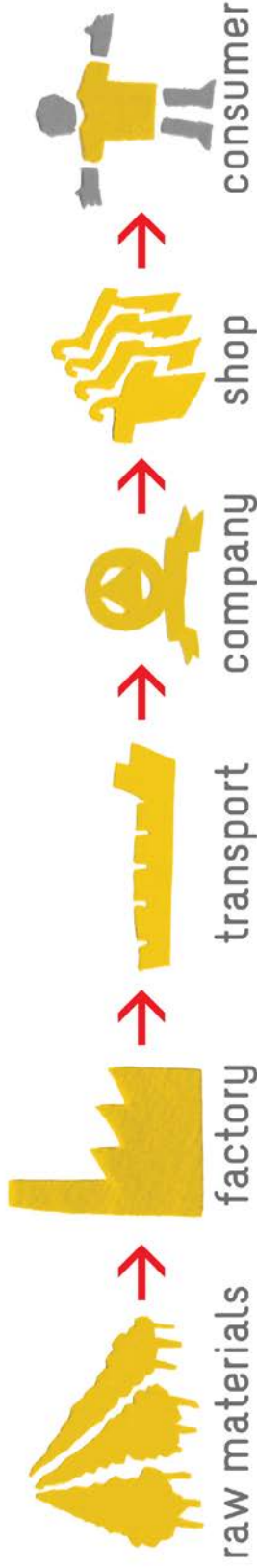
Chart 1: A simple supply chain

It is very tempting to seek out one single approach to **fix** the problems facing garment and textile workers worldwide.

Just get the company to tell **its factory** to shape up,

is a common response from consumers and businesses alike.

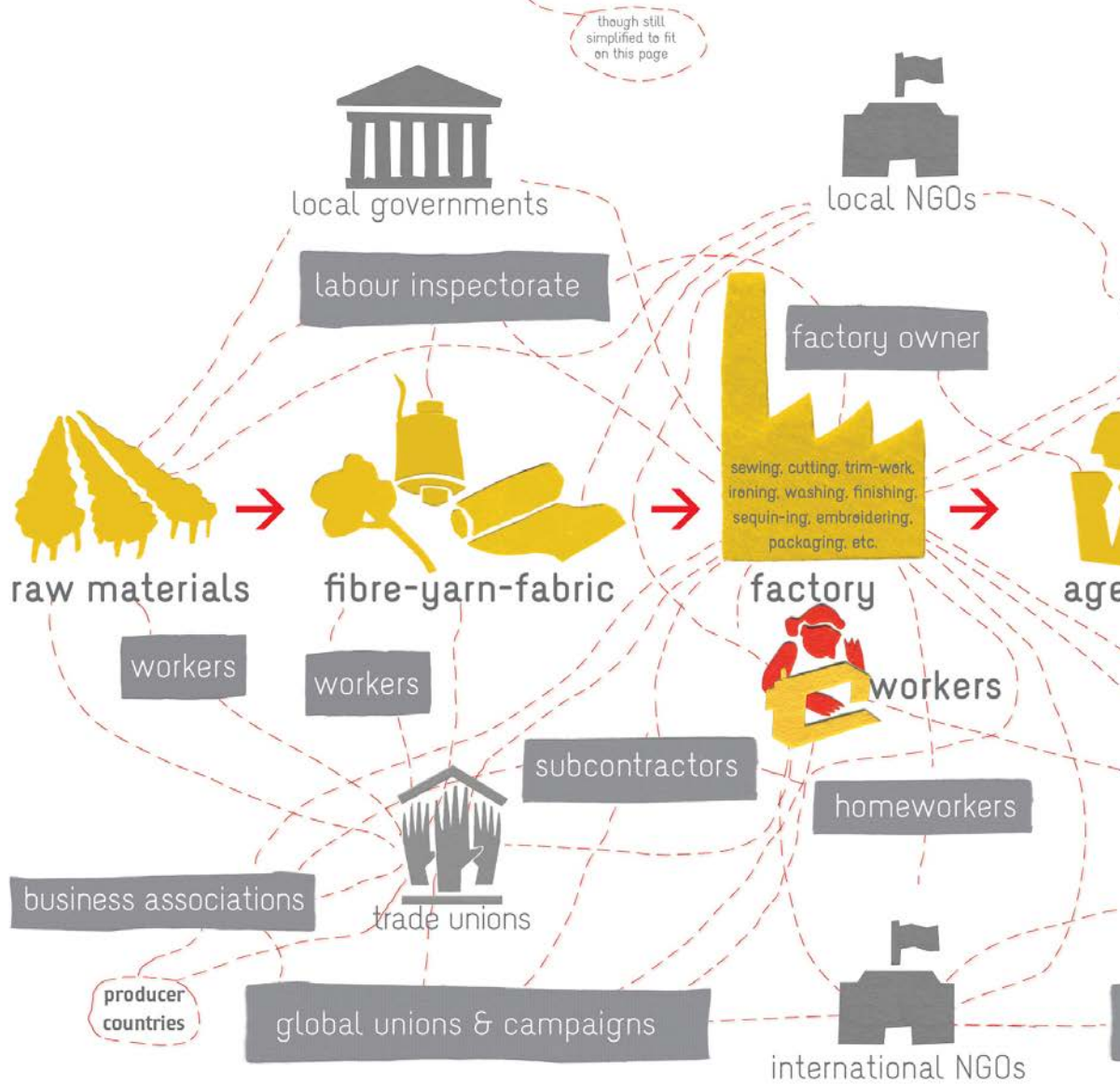
Fair enough. In **garment supply chains of the past**, that might work. The company would likely own the factory or be one of a handful of its customers; and the terms of the business relationship would be clear and direct.



But today it's **quite different...**

Chart 2: The garment global supply chain

A MORE REPRESENTATIVE VIEW OF THE CONTEXT



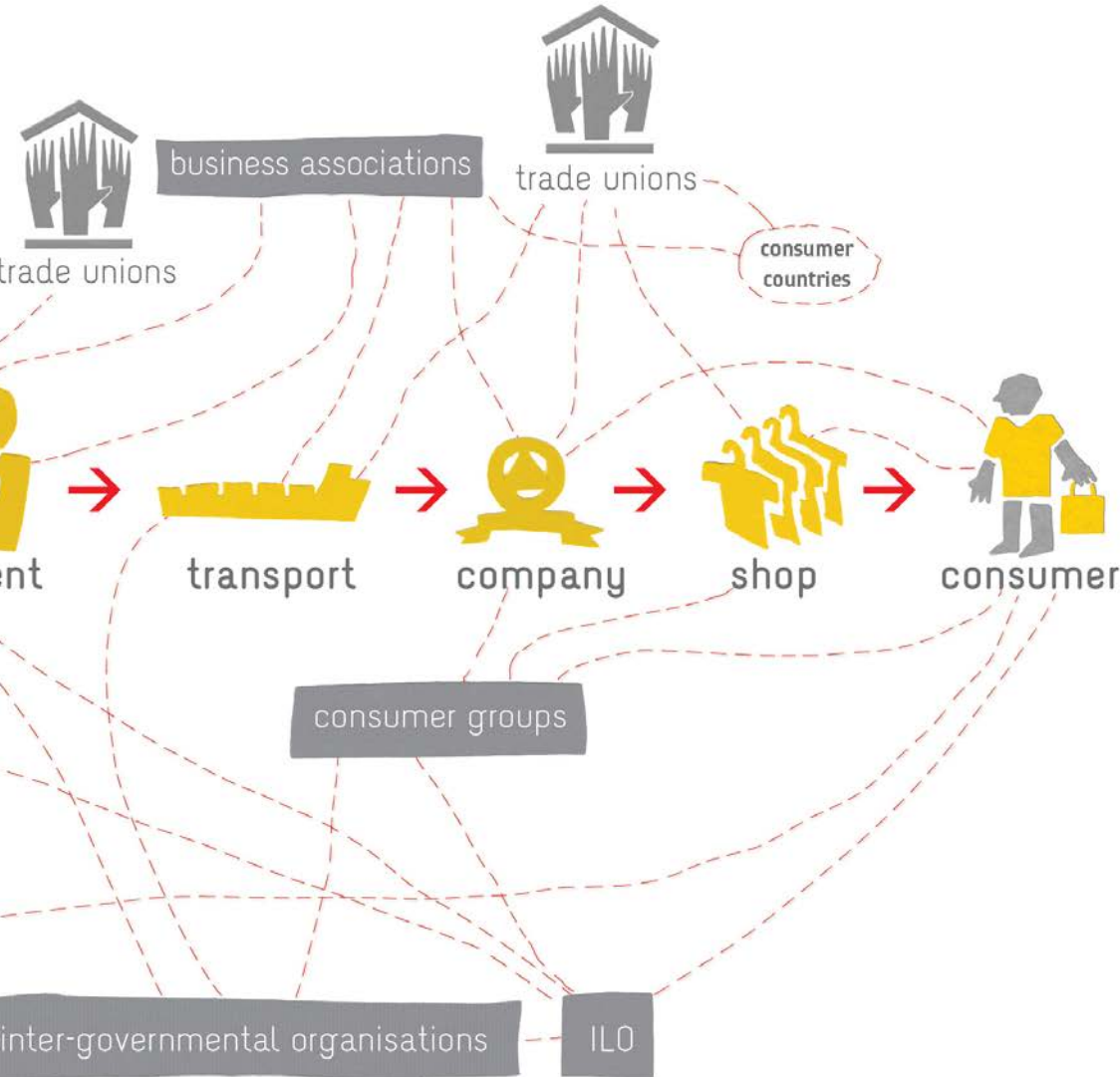
Today's global garment and textile industry spans six continents. The particularities of a country's labour law and its industrial relations greatly impact workplace conditions, wages received, and workers' ability to exercise their freedom of association.

\* outside variables

Many workers are engaged in producing a single t-shirt or pair of trousers. Increasingly, these workers are found in different factories (some are subcontractors), each with different management and workplace conditions.

\* companies struggle to monitor every workplace where each product is made (remember, nowadays companies produce dozens or hundreds of styles each season)

# IN WHICH FACTORIES AND COMPANIES WORK



It is common for large garment and textile companies to source from dozens – even hundreds – of factories. In this context, it is difficult to build long-term, trusting relationships between factories and companies.

• disincentives for investment in factory improvements

And, most factories receive orders from many companies, often with different expectations and requirements with regard to CSR.

• without collaboration, it is not likely that any single company possesses the leverage to effect real changes in the workplace.

It certainly is **complex**. But it is **not unsolvable**.

In these kinds of supply chains – which are very common in apparel and many other consumer goods – the responsibility to comply with legislation related to worker welfare and rights lies with the employing factories. However, the power to set prices, and to ensure they are high enough to allow decent working conditions, lies in part with the clothing brands. All factories have to comply with national labour laws and standards. Lead factories, however, have the power to influence labour conditions throughout their supply chains, by among others, through changes in price settings, corporate social responsibility (CSR) practices and adherence to ethical codes of conduct.

From the factory side, there are also forces that encourage fragmentation, especially in apparel. Many factories will choose to produce goods for many different brands. This reduces their risk of becoming too reliant on any one customer. For example, clothing factories do not have just one lead company – they may have 20 or 50 or 100. These buyers have significant power to influence a supplier's capacity to respect workers' rights, particularly as the large numbers of factories making nearly identical products (for example, t-shirts or trousers) means that competition – and pressure for low prices and fast production – can be very great.

Many low-income countries in the global South have promoted export-led growth and have become an increasingly important part of the global economy through their integration into supply chains. For example, agriculture-based economies in sub-Saharan Africa see horticulture as a key sector for economic growth, exports and employment for women. The growth of global supply chains (GSCs) in developing economies has been boosted by Export Processing Zones (EPZs) or Special Economic Zones (SEZs) offering a favourable business environment, including tax exemptions and free provision of infrastructure. EPZs have been set up in 130 economies for the processing of imported materials that are then re-exported to other countries. As a means to promote the export sector, in some cases, factories are specifically excluded from national labour and tax regulations, including the freedom to form and join a trade union.



### Example: Peru and Colombia

The growing non-traditional agricultural export (NTAE) industries in Peru and Colombia – namely asparagus and cut flowers, respectively – are providing increased employment opportunities for women, particularly in rural areas, where other salaried jobs are scarce. However, recent research shows that the Andean governments' numerous policies to promote the growth of the NTAE sector have not been matched with efforts to guarantee safety and quality of employment. It appears that recent labour reforms in Peru and Colombia have actually served to worsen working conditions and wages, while ensuring lower costs and increased flexibility for employers. (Ferm, 2008).

Relationships between buying and producing countries are often complex. In 1991, the US lifted the tariff on asparagus imports, opening an enormous new market for the premium vegetable, which the huge agro-exporters dominate. In 2000, legislation was passed in Peru to further encourage the growth of the asparagus industry. Tax on profits was reduced to half the national average, the minimum wage modified and an “accumulated workday” formula was introduced to allow employers to require a 20-hour workday. The law applied only to the female-dominated agro-industry sector. (Solidar, 2012)

According to Oxfam International (2004) globalization has resulted in trade policies that reinforce insecurity and vulnerability for millions of women workers. Oxfam's research was carried out with partners in 12 countries, involved interviews with hundreds of workers (mostly women) and many farm and factory managers, supply chain agents, retail and brand company staff, unions and government officials. It revealed how retailers (supermarkets and department stores) and clothing brands are using their power in supply chains systematically to push many costs and risks of business on to producers, who in turn pass them on to workers, often women. In developed economies, women are also employed in precarious jobs in global supply chains, for example, in supermarkets and sports retailers.

*The benefits of flexibility for companies at the top of global supply chains have come at the cost of precarious employment for those at the bottom. (Oxfam, 2004, p. 3)*



### Example: Electronics sector

The electronics sector is characterized by fluctuating orders, due to the short product cycles for electronic products and rapid obsolescence. This results in a high level of temporary and agency workers in some countries and high levels of overtime in others. In countries with a strong supplier base in electronics, domestic regulations have played a key role in determining how supply chain supplier firms react to production flexibility. In Mexico and Thailand there are large numbers of temporary workers; while in Malaysia and China there are high levels of overtime work. Chinese factories face a legal limit (since March 2014) restricting the number of temporary workers to no more than 10 per cent of the workforce. In India, the proportion of temporary, contractual and indirect wage employment accounted for just over 40 per cent in the industry. An estimated two-thirds of female workers in the electronics industry are in temporary, contractual or indirect wage employment. (ILO, 2015)

## What is decent work?

Decent work gives people opportunities for:

- Work that is productive and delivers a fair income.
- Guaranteeing rights at work: so that workers have well-being and security in the workplace.
- Social protection: to enjoy working conditions that are safe, allow adequate free time and rest, take into account family and social values, provide for adequate compensation in case of lost or reduced income and permit access to adequate healthcare.

- Social dialogue: freedom for people to express their concerns, organize in trade unions and participate in the decisions that affect their lives.
- Equality of opportunity and treatment for all women and men: including non-discrimination, equal pay for work of equal value, and maternity protection.

The ILO's fundamental Conventions are:

- Freedom of Association and Protection of the Right to Organise Convention, 1948 (No. 87)
- Right to Organise and Collective Bargaining Convention, 1949 (No. 98)
- Forced Labour Convention, 1930 (No. 29)
- Abolition of Forced Labour Convention, 1957 (No. 105)
- Minimum Age Convention, 1973 (No. 138)
- Worst Forms of Child Labour Convention, 1999 (No. 182)
- Equal Remuneration Convention, 1951 (No. 100)
- Discrimination (Employment and Occupation) Convention, 1958 (No. 111)

For further information on the ILO's Decent Work agenda see: <http://www.ilo.org/>

Listen to the presentation from Professor Stephanie Barrientos, who talks about the complexity of global supply chains, including the fragmentation of work and of production in global supply chains. She argues that global supply chains have been beneficial to women and men in opening up new employment, but the downward pressure on costs has also resulted in a significant increase in precarious work, particularly for women. She discusses the role that the ILO is playing in improving labour standards in global supply chains and in promoting alliances.

See: [http://www.ilo.org/global/about-the-ilo/multimedia/video/video-interviews/WCMS\\_382039/lang--en/index.htm](http://www.ilo.org/global/about-the-ilo/multimedia/video/video-interviews/WCMS_382039/lang--en/index.htm)





# Case Study 1.1

## Global garment industry

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### Background

There has been a period of significant change in the main producing and export countries of the garment market since the 1970s. OECD countries are no longer significant exporters. The largest supplier bases can now be found in China, Bangladesh, Viet Nam, India, Turkey, Indonesia, Mexico, Thailand, Pakistan, Tunisia, Cambodia, Sri Lanka, Morocco, Romania and Poland.

The garment industry is a global one: supply and value chains are spread across many countries and continents. According to Better Work<sup>2</sup> about 60 million people were employed in the textile, clothing and footwear sector worldwide in 2014, compared to 20 million people in 2000. About three-quarters of garment workers worldwide are female. The industry is seen as ‘a stepping stone to development’ in many countries. The garment industry operates in many least developed and developing countries.

Globalization of the garment sector has created a rapid increase in employment opportunities in developing economies, particularly for unskilled women, young people and migrants. However, much of this employment takes place under poor working conditions. Lead firms in the garment supply chain tend to be large retailers or design houses that are concentrated in the United States, the EU and Japan. (ILO 2015) Lead companies source from supplier firms, which are concentrated in emerging and developing economies. Working conditions of garment workers, many of whom are young female migrants from rural areas, are frequently what the ILO describes as ‘unacceptable forms of work’ and fail to meet international labour standards. The Rana Plaza tragedy, in which 1,129 workers were killed when a building collapsed, illustrates the type of problems that exist in the garment sector in some countries.

### Structure of sector

In the past a company would most likely have owned its own factory. Today global production does not follow a simple chain. For example, the production of a dress for a global brand may involve many factories and sub-contractors, who in turn produce dresses for many companies. Many supplier firms compete for orders from retailers, which reduces suppliers’ bargaining power. (ILO 2015)

The garment sector is typified by a high share of short-term contracts and highly variable working hours, because garment suppliers need to respond quickly to volatile ordering demands. In some cases production is sub-contracted from a large factory to several smaller factories, which in turn sub-contract to homeworkers. Each factory may produce for a number of different brands, making it difficult to establish strategies to improve conditions in the factory. While some buyers may encourage improved standards for workers, others may be driving prices down, making it challenging to introduce higher wages, training or regular hours. In global supply chains tight production deadlines and changing fashion products puts pressure on suppliers for fast turnaround.

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2 Better Work is a joint project of the International Labour Organization (ILO) and the International Finance Corporation (IFC)



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## The gender dimensions of garment global supply chains

Women's opportunities for formal employment have grown considerably with the expansion of the garment sector in developing countries. (Kabeer, 2004; Heath and Mobarak, 2011) Women represent over three-quarters of workers in the garment sector (more than 70 per cent of garment workers in China are women, in Bangladesh the share is 85 per cent, and in Cambodia as high as 90 per cent). Despite this huge growth of formal employment for women, the majority carry out 'low-skilled' tasks such as sewing, embroidery, cutting and finishing of garments. Many women garment workers experience poor working conditions, poor maternity protection and insecure employment. The sector has a very low rate of unionization, making it more difficult for women to be protected against unsafe or exploitative working conditions.

**Source:** Fair Wear Foundation (2014); Institute of Development Studies (2006); Better Work, undated; ITUC (2016).

## Case Study 1.2

# The horticulture and cut flower global supply chain

### Background

The horticulture and cut flower industry is seen as beneficial to developing countries, particularly in Africa, because of its higher returns and employment. Cultivation of fruits, flowers and vegetables is substantially more labour intensive than cereal crops and offers significantly more post-harvest opportunities for the global chain to add value. There is a rise of regional supply chains within the global South. (Evers et al. 2014) Several developing countries have successfully up-graded into packing and processing, and the number of women employed in the sector has increased significantly. (Staritz and Guilherme Reis 2013)

Over half of the flowers bought in Europe are produced in Africa. According to Women Working Worldwide, pressures to produce a supply of fresh and high-quality flowers, often under very tight deadlines, impacts on the health, well-being and rights of workers.

In Kenya, for example, the cut flower industry has grown rapidly. It provides employment for more than two million people. However, many of the jobs are extremely low paid and are unskilled. Jobs grading, packing, harvesting, tending beds and watering are low skilled. Many workers are very poor and vulnerable to exploitation. (FAO, IFAD & ILO 2010)



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*“The flower industry promises to make important contributions to Kenya’s economic development by providing rural employment, attracting foreign investment, and improving domestic technology and infrastructure. However, for this development to be sustainable, environmental impacts and social abuses must be addressed effectively in order for the industry to fulfill its potential positive effects.”*  
(Leipold & Morgante, 2013, p.2)

## Structure of the sector

The horticultural value chain includes several stages: inputs (such as seeds, fertilizers, agrochemicals, and farm and irrigation equipment), production, packing and storage, processing, and distribution and marketing. The chain is buyer-driven and the lead firms are large supermarkets in key markets. (Staritz and Guilherme Reis 2013) Supermarkets may have very tight deadlines resulting in production pressures on workers, especially at peak times such as Valentine’s Day.

## Gender dimensions of the horticulture value chain

There is a marked gender bias in roles. Men are favoured for positions that require physical strength. Women are preferred for jobs that depend on finesse, dexterity, and attention to detail. There is also gender bias with respect to crop types. Women participate in all stages of the value chain but are concentrated in the packing segment. Women are likely to have different wages and contractual conditions from men, flexible employment that heightens uncertainty, limited access to training and they experience sexual harassment.

Low wages and flexible employment of predominantly female workers help reduce employers’ costs – at women workers’ expense. But the lack of training can limit productivity and prevent upgrading into more sophisticated segments of the chain—particularly those that depend on women. (Staritz and Guilherme Reis 2013) While union activity is discouraged on the farms, the principal drivers to improve working conditions and the rights of women workers in Uganda have been promoted through collective bargaining and advocacy by Ugandan trade unions and non-governmental organizations, backed by European NGOs. (Evers et al., 2014)

➔ **A case study of the collective bargaining agreement in the cut flower sector in Uganda can be found in Module 8: Case Study 8.3: Challenging sexual harassment in horticulture through social dialogue in Uganda.**

## References and further resources

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### **b) Additional resources and reading**

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