



OUTCOME REPORT

2020





Bonsucro Outcome Report 2020
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SUMMARY

The COVID-19 pandemic caused huge disruption to the sugarcane sector in 2020 and forced everyone to swiftly adapt. Despite challenging circumstances, Bonsucro and its members achieved some very positive outcomes.

COVID-19

Bonsucro supported its members and the wider sector with guidance on how to operate safely and created a resource hub on its website. The team worked with certification bodies to ensure that audits and certifications could still go ahead, or extensions were permitted. The team also engaged with members and partners through online meetings and webinars. It's clear that disruptions will extend well beyond 2020, but Bonsucro is ready to support members and the sector to navigate future challenges.

MEMBERSHIP

In 2020 new organisations joined Bonsucro from countries which were not previously represented in the membership, such as Barbados, Ecuador, and the United Arab Emirates. In total, membership grew by 13.5%.

CERTIFICATIONS

Certification also continued to grow in 2020, with 13 new mills complying with the Bonsucro Production Standard. One of which was in Panama – the first certification in the country. There were 19 new Chain of Custody certifications. This included the first certified plastic manufacturer in Asia, demonstrating yet more interest in bioplastics made from certified sustainable sugarcane.

IMPROVING FUNDAMENTAL FRAMEWORKS

In the past year, Bonsucro improved some of its fundamental frameworks, launching a new Code of Conduct and Grievance Mechanism. Both pieces of work were underpinned by the United Nations Guiding Principles on Business and Human Rights.

In addition, work on the Bonsucro Production standard revision continues. The process is being led by the Standards and Innovation team with the help of a dedicated working group. In 2020, a successful public consultation was held on the first draft of the new Standard.

PROTECTING THE ENVIRONMENT

The latest data shows that certification against the Production Standard has significant environmental benefits. The longer producers have been certified, the more acute the benefits. The 2019-20 harvest data demonstrates more reductions in greenhouse gas emissions, more efficient water use and lower rates of fertiliser use.

PROTECTING WORKERS

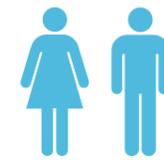
The Bonsucro Standards include social indicators, and the latest data demonstrates further progress in creating safe working conditions both on farms and at mills. The average pay for the lowest paid workers remains close to 20% above national minimum wage. In addition, over the years of certification, certified operators and workers experience a fall in accidents of up to 74%.

LOOKING AHEAD

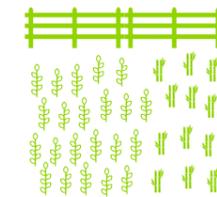
In 2020, Bonsucro started the process of developing a new strategic plan. The aim is to ensure that the strategy development is inclusive and will consult the staff, members and partners in the sugarcane sector, and other sustainability standards. In July, Change Agency was appointed to help research and facilitate the process.

Bonsucro is confident the strategy will include ambitious targets. A new strategy, combined with improved internal frameworks will put Bonsucro in a strong position to drive sustainability in the sugarcane sector.

HIGHLIGHTS 2020



30 NEW MEMBERS
joined the platform



There are
1,220,559
hectares
of certified land



67,749,075
tonnes of certified sugarcane
were produced

Certified operators
reduce their water use by

50%

after six years of
certification
(from 35.32 m³ of water
per tonne of cane to 16.81
m³ per tonne of cane)



There were
25
credit trade
transactions



The number of
certified mills rose to

128



After 9 years
of certification,
producers reduce
use of nitrogen
fertilisers by

28%



On average,
wages are
19%

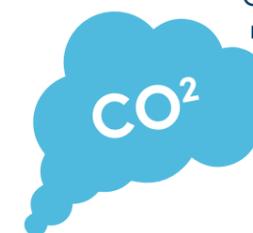
higher than the national
minimum on Bonsucro
certified farms



The Bonsucro
certified sustainable
sugarcane seal
was used in

28

different
countries



On average, certified farms
reduce CO₂e emissions by

18%

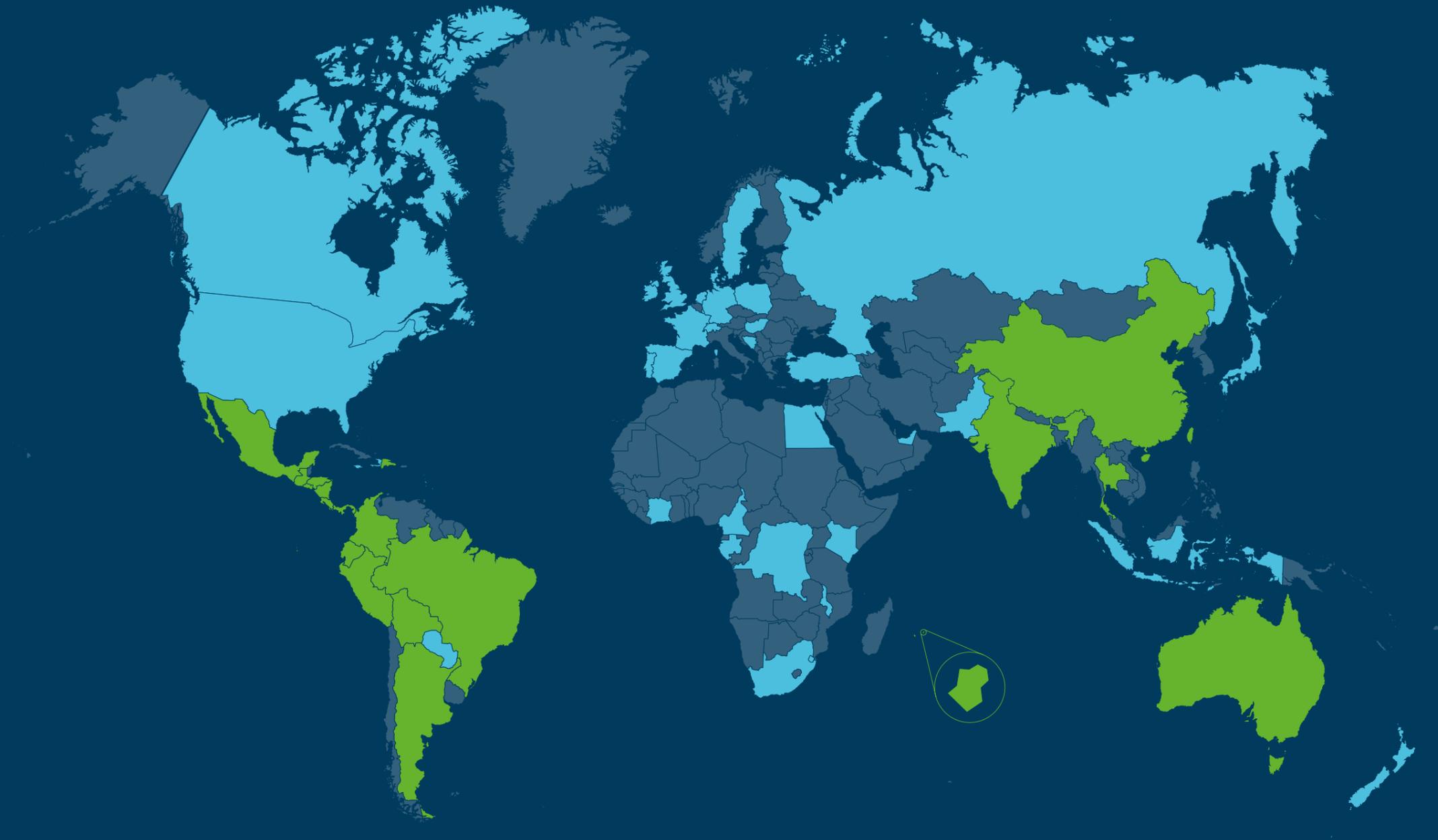
after five years of
certification, and 55% after
eight years of certification



Sales of certified sugar,
increased to

1.83
Million

tonnes (or 71%) compared
to the 2018-19 season



Countries with Bonsucro members



Countries with certified mills

BONSUCRO WORLDWIDE

BRAZIL

72 certified mills

55 members

4,809,662.71 tonnes
(Certified sugar volume)

83 organisations with Chain of Custody

THE AMERICAS WITHOUT BRAZIL

25 certified mills

68 members

867,013.89 tonnes
(Certified sugar volume)

40 organisations with Chain of Custody certificate

MIDDLE EAST AND AFRICA

1 certified mills

17 members

N/A tonnes

20 organisations with Chain of Custody certificate

ASIA

21 certified mills

63 members

251,460.04 tonnes
(Certified sugar volume)

4 organisations with Chain of Custody certificate

PACIFIC

9 certified mills

12 members

307,757.00 tonnes
(Certified sugar volume)

33 organisations with Chain of Custody certificate

EUROPE

37 members

12 organisations with Chain of Custody certificate

Total certified mills: 128

Total members: 280

Total Tonnes: 6,235,894.00
(Certified sugar volume)

MEMBERSHIP HIGHLIGHTS

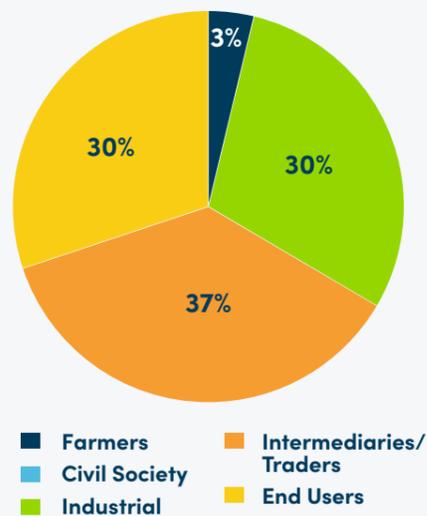
In 2020, Bonsucro carried out a review of its membership categories. The evaluation highlighted that many of the 312 individual farmers listed as non-paying, non-certified members had never engaged with Bonsucro. The Secretariat attempted to locate and engage with a large cohort of farmers in India and a smaller group in Brazil. Despite best efforts, many of them could not be contacted and were removed from the membership. This thorough check also ensured that farmers who belong to farmer associations are not considered twice. This led to a reduced, but engaged, membership.

Despite this reduction in overall numbers, Bonsucro continues to grow membership in all other categories. In 2020, 30 new members joined Bonsucro from countries which were not previously represented in the membership. These included Barbados, Chinese Taipei, Ecuador, and the United Arab Emirates.

Sugarcane producers and mills continue to make up the largest proportion of the overall membership. These two classes combined grew by 33% in 2020. However, the highest growth was in the intermediary category, with just over 36% more members. Bonsucro has gained more members in the bioplastics and biomaterials space which tend to have longer supply chains, accounting for more intermediaries.

Over the year, end users also grew by 30%. These new members joined from a range of sectors, including plastics, biochemicals, alcoholic beverages, biotech, and food manufacturers. This is because Bonsucro and its members are working hard to bring more supply chains on to the platform and promote the demand for sustainable materials. There is also greater need for better assurance due to legal requirements on human rights and environmental due diligence, and consumer pressure for sustainability.

Growth by Membership Class (2020)



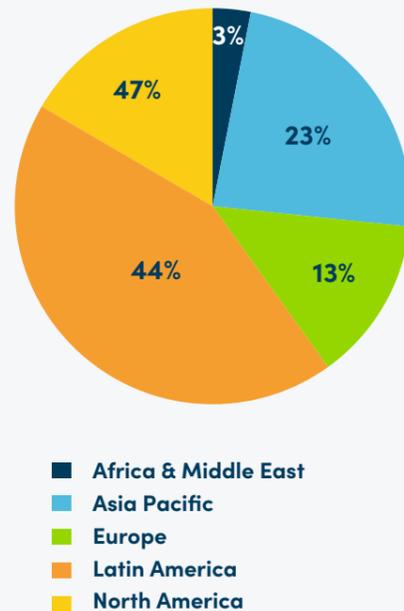
MEMBERSHIP BY REGION

Latin America is the biggest membership class, accounting for almost 43% of the whole membership. Brazil is the biggest sugarcane producing country and is very engaged with Bonsucro. However, Bonsucro saw significant expansion of members from other countries in Latin America, resulting in a growth of 44% in the region in 2020.

In 2020, the Asia Pacific region grew by 23%. This growth is mainly from end users in countries, such as China and Japan. Six of the world's top ten sugarcane producing countries are in Asia. Therefore, the Secretariat was pleased to see growth from end users and biomaterial producers, demonstrating the region's appetite for sustainability across the supply chain.

Africa and the Middle East remains the smallest section of the Bonsucro membership, however membership increased by 3%. The Secretariat has seen more interest in membership from across the continent, so there is an expectation that membership will continue to rise.

Growth by Region (2020)



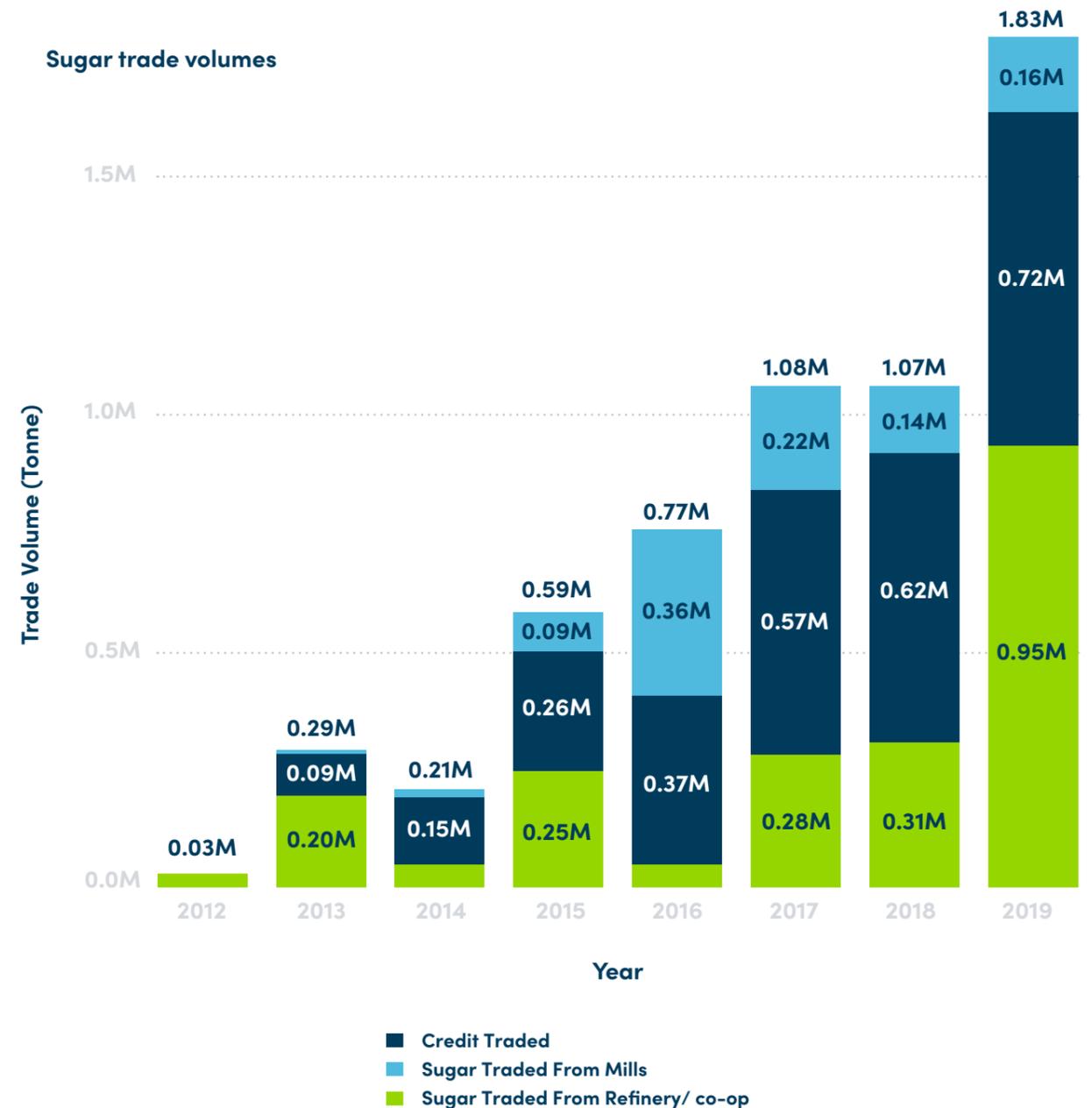
MARKET UPTAKE

Bonsucro believes the market has the power to drive the uptake of sustainability practices in the sugarcane sector. Bonsucro has developed tools to support global and local buyers of sugarcane products to better understand their supply chains and identify where their products come from.

The past year (2019) was very positive for trading Bonsucro certified sugar. Overall sales of certified sugar, of both physical and credit trades, increased by 1.83 million tonnes – a 71% increase compared to the 2018–19 season. This growth can be attributed to credits sold. In 2019, 946,559 tonnes of raw sugar credits were sold – treble the 2018 figure of 308,448 tonnes. Credits now account for 50% of certified sugar sales, demonstrating the positive impact of launching the Credit Trading Platform in 2019. Additionally, sales of physical certified sugar grew by 102,000 tonnes compared to the previous year.

There is still room to improve, so Bonsucro will continue to engage with its buyer members to promote sustainability commitments and procurement targets. Bonsucro will also encourage new buyers, across all markets, to join the platform.

Sugar trade volumes



CASE STUDIES

ADAPTING TO COVID-19

When COVID-19 began to spread across the world, businesses had to swiftly adapt, and Bonsucro was no exception.

Before the scale of the pandemic became apparent, the team faced a difficult decision – whether to go ahead with the annual flagship event, Bonsucro Global Week, due to take place in Mexico in the middle of March. After careful deliberation with the Board of Directors, Bonsucro decided to cancel the event until further notice. The members were all very understanding and supportive.

Spanning seven countries, the UK, India, Singapore, South Africa, Argentina, Brazil and Mexico, the team was accustomed to video meetings and quickly adapted to the new norm of working from home.

Bonsucro also supported its members and the wider sector by offering guidance on how to operate safely. This guidance was published in English, Spanish and Portuguese. The team also created a COVID-19 resource page to share advice for the sector from reputable sources such as the Business and Human Rights Centre, Innovation Forum, and The Food and Agricultural Organization of the United Nations. During 2020, the page was visited by more than 400 unique users.

To ensure that audits and certification could continue, Bonsucro collaborated with the ISEAL Alliance and other sustainability standards. The assurance team worked with the licenced certification bodies to help them adapt to running audits remotely and offered extensions for audits where necessary. Between March and December 2020, over 90% of audits were conducted remotely or included a remote component.

Webinars have been a great way to connect and support members. In April, 200 people from 30 countries took part in a webinar looking at practical guidance on how to respond to the crisis.

In July, Bonsucro looked at the impact of COVID-19 on the sustainability of the sugarcane sector together with the International Society of Sugar Cane Technologists (ISSCT) and the International Sugar Organization. More than 600 people from 51 countries joined the webinar. These webinars continued to support even more industry stakeholders throughout 2020, receiving nearly 1,000 views on YouTube.

Bonsucro's regional teams kept in touch with members and partners around the world to understand how COVID-19 was impacting different countries and the sector generally. Bonsucro will continue to adapt to the changing situation and maintain support for the sector.



PROGRESS IN THE PRODUCTION STANDARD REVISION

The Bonsucro Production Standard is at the heart of everything Bonsucro does. It sets out a definition of what sustainable sugarcane production should look like, providing a comprehensive metric tool for farmers and millers. Bonsucro is committed to ensuring the Production Standard is current, creates a positive lasting impact, and meets the expectations of stakeholders. The Production Standard is revised every five years, following a rigorous process led by the ISEAL credibility principles.

In 2019, Bonsucro launched the Production Standard revision process. Since the last revision of the Standard in 2014, the field of sustainability has evolved substantially. Bonsucro and its partners have gained a greater understanding of the sustainability issues present in sugarcane production and processing, and what can be achieved with certification.

Over this time, feedback on the Bonsucro Production Standard and the Calculator was monitored and considered. The objective of the revision is to capture all this information and priorities set by stakeholders and bring new ideas into the Standard.

In 2020, Bonsucro made huge progress in the revision process. The first draft of the new Standard was finalised and put out for public consultation. During the consultation period, Bonsucro held 27 hours of webinars in four languages. In total, 297 individuals from 26 countries took part in these webinars.

Nearly 300 individuals from over 200 organisations responded to the consultation with comments with comments, totalling over 4,000 separate comments. Of these, 53% were from non-members. This was by far the largest consultation effort Bonsucro has carried out since the first Standard was introduced ten years ago.

All of the comments were read by the working group and will be factored into the second draft of the Production Standard.



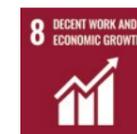
Photo credit: Ed Kashi



Photo credit: Ed Kashi

DEVELOPING A NEW GRIEVANCE MECHANISM

Supporting the Sustainable Development Goals:



Having an effective Grievance Mechanism is essential for risk management and remediation for voluntary sustainability standard schemes. In 2020, Bonsucro created and launched a new Grievance Mechanism to manage complaints against its members.

The Grievance Mechanism sits within a newly defined accountability ecosystem that provides space for stakeholders to complain against the action or inaction of members, should the need arise.

Bonsucro worked with the independent law firm, DLA Piper, to ensure the Grievance Mechanism is aligned with international best practice as well as the United Nations Guiding Principles on Business and Human Rights.

As part of the Grievance Mechanism, Bonsucro wanted to create a fair and independent mediation process to determine the validity of allegations and any subsequent action to be taken. To do this, Bonsucro partnered with the Centre for Effective Dispute Resolution (CEDR) - a well-established and highly respected organisation, at the forefront of providing mediation services for commercial disputes.

The whole complaints system was designed with respect to inclusivity and accessibility. Bonsucro has allocated some budget every year to fund complaints that go through CEDR.

PAYMENT FOR ENVIRONMENTAL SERVICES IN SUGARCANE PRODUCTION

Project partners: Orplana (Organization of Associations of Sugarcane Producers of Brazil), Socicana (Association of Sugarcane Growers of Guariba), Solidaridad Brazil, Geoflorestas Consultancy

Project length: 12 months

Budget: \$11,700USD

Supporting the Sustainable Development Goals:



Payment for environmental services (PES) are relatively new schemes that seek to offer payment to landowners to implement good agricultural practices and protect the environment. In partnership with Earth Innovation Institute, under its Forests, Farms & Finance Initiative, Orplana (Organization of Associations of Sugarcane Producers of Brazil), Socicana (Association of Sugarcane Growers of Guariba) and Solidaridad Brazil, Bonsucro investigated the potential of PES within the sugarcane supply chain. The project also received technical assistance from Geoflorestas consultancy.

The study was split into two phases:

- Phase 1: desk-based research using keywords and data analysis
- Phase 2: interviews with fifteen stakeholders from private and public sectors

As a result, Bonsucro has identified three main benefits for PES initiatives:

1. Adding financial value to farmers while ensuring environmental preservation
2. Offering guidance on the practices for preserving land/habitats
3. Enhancing livelihoods within the region that the initiative is developed

The interviews revealed some common priorities of environmental services in the public and private sectors. The top priority was biodiversity conservation, followed by forest conservation. Water resources management and carbon credits were also frequently mentioned. Some participants believed the premise that preserving forests would start a chain reaction which would positively impact all other environmental services.

The research concluded that there is no doubt that sugarcane farmers are providers of various environmental services, from carbon sequestration to biodiversity conservation.

Following on from the study, the aim is to advance the PES agenda in Brazil, specifically in the context of sugarcane.



PREVENTING WORKER EXPLOITATION IN SOUTH AFRICA

Project partners: Stronger Together

Project length: 12 months

Supporting the Sustainable Development Goals:



Modern slavery is still common in many supply chains. One organisation that tackles worker exploitation in South Africa is Stronger Together – a multi-stakeholder business-led initiative.

As the sugarcane sector in South Africa relies heavily on temporary workers and often migrant labour, it is considered a high-risk for exploitation. Stronger Together decided to expand its work into the sugarcane sector and approached Bonsucro for support. Bonsucro's Regional Director for Africa and the Middle East introduced Stronger Together to local members, leading sugar companies, mills, and grower associations. Throughout the year, the team offered practical guidance and hosted seven workshops covering:

- detecting, deterring, and dealing with forced labour in agri-business
- risk mitigation
- how to deal with labour challenges

The collaboration in South Africa helped to establish a valuable partnership between Bonsucro and Stronger Together, and future projects in other countries are being discussed.

COALITION TO IMPROVE THE SUSTAINABILITY OF SUGARCANE IN MEXICO

Project partners: PepsiCo, Proforest, GAM and One Peterson

Project budget: \$131,982.00

Supporting the Sustainable Development Goals:



In the sugarcane sector, historically problematic issues include child labour, land and water use, occupational health, contracts and compliance with labour laws, and management of areas that have High Conservation Value.

To address such issues in Mexico, Bonsucro has been working with PepsiCo, Proforest, One Peterson and GAM on a project to build capacity and empower sugarcane smallholder farmers.

The coalition for small-scale sugarcane aims to drive change in the sector and support 250 smallholder farmers that supply the Tala mill to achieve certification.

Research was carried out to understand where there are gaps in understanding on these issues. Using the findings, we have developed a library of tools and resources to help farmers fill those gaps and work towards certification. They will also be available for other stakeholders in the Mexican sugarcane industry to use.

ENVIRONMENTAL INDICATORS

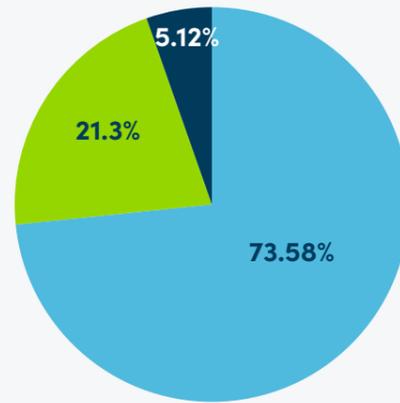
GREENHOUSE GAS EMISSIONS

Bonsucro wants to help members identify how to adapt to tackle challenges caused by the climate crisis. Part of this involves examining greenhouse gas emissions (GHG) in the sugarcane supply chain. Bonsucro uses certification data to show where GHG emissions come from, quantify them, and identify opportunities to reduce them.

For the last nine years, the Bonsucro Standard has enabled certified operators to collect and evaluate their GHG emissions in a consistent and detailed manner. By quantifying sources of emissions, operators have a better chance of understanding how to reduce them.

Bonsucro can provide precise quantified maps of emissions in the sugarcane supply chain, based on certification data. Analysis shows that farm activities account for almost 74% of total emissions, mill activities account for a further 21%, and transporting cane between farms and mills accounts for 5%. However, this split varies slightly year on year. In the 2019-20 season, the average emission factor of certified sugar production was 0.47 kg CO₂ per kg sugar. This was composed of 0.35 kgCO₂/kg sugar from farms, 0.10 kgCO₂/kg sugar from mills, and 0.02 kgCO₂/kg sugar from transportation.

Although agricultural activities are the main source of emissions, certification data indicates that farmers who have been continuously certified for several years implement practices that reduce their emissions. After five years, farms reduce their emissions from 0.31 kg CO₂eq/kg sugar to 0.25 kg CO₂eq/kg of sugar. After eight years of certification, emissions drop to 0.14 kg CO₂eq/kg of sugar – a decrease of 55% from the year of initial certification. Reductions in emissions appear to come from lowering fertiliser use, land use change, and diesel use. Bonsucro is committed to supporting farmers to reduce their scope 1 and scope 2 emissions over their certification.



- GHG emissions from transportation
- GHG emissions from agriculture
- GHG emissions from mills

WATER USE

Since its inception, the Bonsucro Production Standard has included metric indicators on water use. This is to recognise the importance of water in sugarcane farming and milling and acknowledge that sustainable operations must take careful consideration of their available water resources. Acting on water efficiency starts with collecting data.

Implementation of the Bonsucro Standard has encouraged many farmers to install water flow meters, or when not available, develop an estimation methodology that allows operators to report on water consumption.

Water consumption at farm level

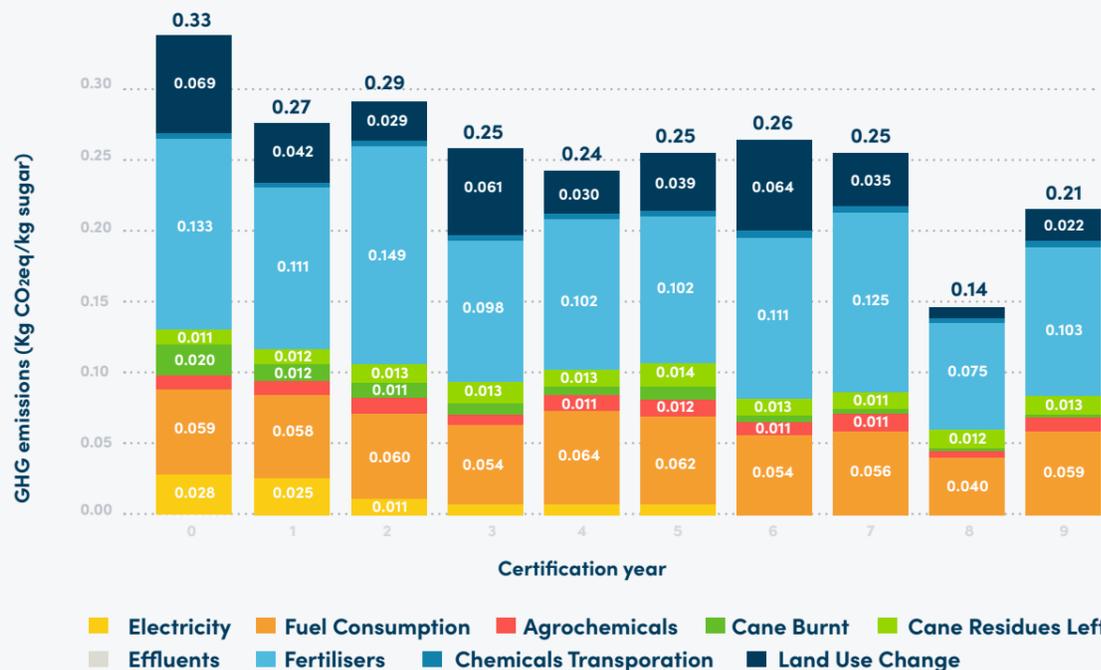


Irrigated water used efficiency



The data collected from certified farms shows that water use per tonne of cane harvested decreases over consecutive years of certification. Starting from 35.32 m³ of water per tonne of cane, operators see a 50% reduction after six years of certification to reach 16.81 m³ per tonne of cane. Similarly, for mills with irrigated operations, the water use efficiency increases from 105kg cane per millimetre of irrigated water per hectare to 141 kg cane after six years. This represents an increase in productivity of 34%. In other words, farmers manage to produce 34% more cane with the same amount of water applied to their fields, reducing pressure on the available water resources.

Graphs explained: The graphs show years of continuous certification. The 'certification year' axis represents the number of years a producer has been certified. Year 0 is the data collected when a producer is first certified. Year 1 is the data collected by a producer one year after the first certification, and so on.



FERTILISERS

The Bonsucro Production Standard stipulates that producers must adapt the amount of nitrogen (N), phosphorus (P), and potassium (K) in their fertiliser application to meet the needs of the soil and the sugarcane plants. This is informed by soil or leaf analysis. On average, in the 2019–20 harvest, producers applied 78.13 kg N per hectare (ha) – an increase of 0.5% from 2018. Nitrogen is an important factor to support healthy crops, but its production and transportation is a large contributor to scope 2 GHG emissions. Through ongoing certification, producers demonstrate the ability to reduce their N fertiliser use from 95.25 kg N /ha at initial certification to 68.18 kg N/ha after nine years, which is a reduction of 28%. Lowering the level of N used, reduces the GHG footprint while decreasing expenditure.

Nitrogen application across consecutive years of certification



Similarly, the use of P fertiliser, which typically remains stable across the lifetime of certification, reduced by 2.2% from 2018 to 2019 to reach 56.75 kg P eq/ha. The use of K fertiliser increased by 20% between 2018 and 2019 to reach 97.64 kg K/ha. Nonetheless, the trend of K fertiliser use remains stable across the lifetime of certification at 86.77 kg K /ha per year.

AGROCHEMICALS

Although sugarcane is quite a resistant crop, most production still relies on agrochemicals to optimise yields and help to control pest infestations or weed-contaminated fields. The Bonsucro Production Standard sets a limit of 5 kg active ingredient (ai) per year, per hectare. In 2019, certified producers achieved 3.48 kg ai/ha, which is up by 1.4% compared to 2018. However, this is still 30% below the requirement of the Standard.

Pesticide application accounted for 10% of the agrochemical use, indicating the resilience of the sugarcane crop to pests. While the Standard sets a limit of 5 kg ai/ha/year, there is evidence that producers carefully manage their agrochemical use. The level of herbicides, representing 90% of the agrochemical usage, is stable through the certification process. However, producers increased their pesticide use along their certification period, almost doubling it after nine years of certification. This follows a general trend of increased pesticide use in sugarcane production. Integrated pest management approaches, biological controls and promoting soil health are practical ways to reduce pesticide use. In the future, Bonsucro will look at these areas more closely.

Pesticide application rate



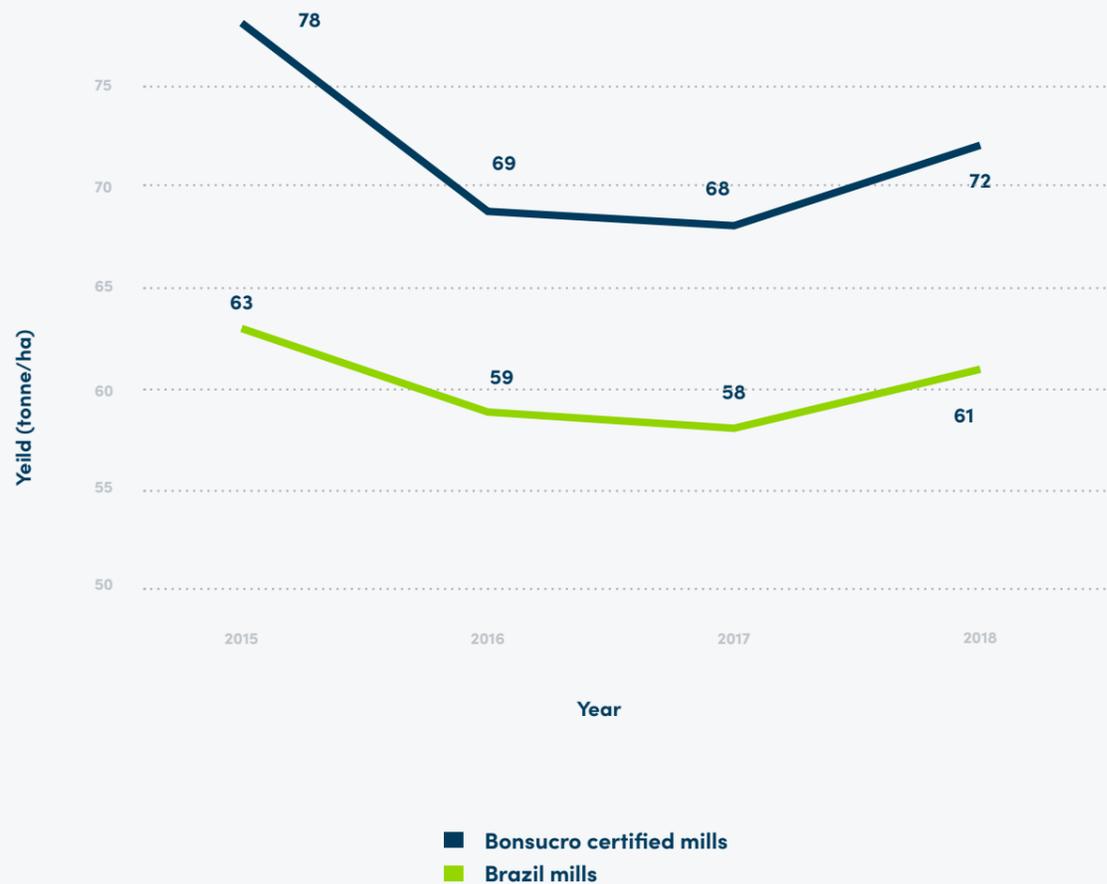
YIELDS

Achieving a good yield will always be a key target for farmers. Good yields come from knowledge, selecting the crop variety, and applying good agricultural practices to counter the negative effects of weather, pests, and weeds. Yield might be the most volatile aspect of farming as it is extremely dependent on the climate and pests.

Studying the yield of certified members compared to yields of all producers in Brazil between 2015 and 2018, using the most recent data available in nine states from UNICA, showed that certified producers exceeded their non-certified peers by 11.5 tonnes of cane per hectare on average. Extrapolated to the area under certification in Brazil, this represents an additional 12 million tonnes of cane produced without need for additional land. Non-certified producers would have had to farm an additional 197,000 hectares of land to achieve the same additional volume of cane.

In 2019, Bonsucro certified mills achieved a global average of 73.19 tonnes of cane per hectare, down 1% from 2018.

Yield comparison between Bonsucro certified mills and non certified mills in Brazil



SOCIAL INDICATORS

ACCIDENT RATE AT FARM LEVEL

Protecting workers' health is central to Bonsucro's Standards and key to sustainable operations. Millers and farmers employing workers to support sugarcane production have a responsibility to ensure that the working environment is safe, that workers are trained for their job, and that health risks are identified and managed. The Production Standard requires farms and mills to have a health and safety plan, supply Personal Protective Equipment to workers and monitor accident rates. This has led to safer working conditions overall.

Over the years of certification, certified operators and workers experience a sharp fall in accidents by up to 74%. Through their investment in health and safety mitigation measures and training, certified entities experience less disruption in their operations. This appears to boost productivity, through increasing worker confidence in the safety of their work environment.

Accident rate at farm level



Accident rate at mill level



WORKING HOURS

In many countries, national legislation sets the maximum number of hours employees can work in a given time period. This includes normal hours, plus overtime. There is a huge disparity between sugarcane producing countries, where maximum working hours can span from 48 hours to over 80 hours per week. The Standard requires certified producers to meet national legislation. However, certification data shows that producers tend to go beyond legal compliance and over consecutive years of certification, they reduce the maximum number of hours worked. After the first year of certification, employees of certified farms and mills work 96% of the legal limit, whereas this drops to 92% after six years of certification. In 2019, the global average of working hours on certified farms was 92% of the legal limit and at certified mills it was 94% of the legal limit.

Working hours ratio compared to national legislation at mill level



Working hours ratio compared to national legislation at farm level



WAGES

To achieve Bonsucro certification, producers must pay minimum wage as set by their local legislation. The data shows that the longer a producer has been certified, the level of pay above the national minimum wage increases. In the first year of certification, wages for the lowest paid worker, are on average 15% higher than the minimum wage at farm level and 20% higher than the minimum wage at mill level. However, wages rise to 19% higher than the minimum at farm level and 26% higher than the minimum at mill level after nine years of consecutive certification. As a global average, Bonsucro certified producers paid their workers was 14% above minimum wage at farm level and 19% above minimum wage at mill level in the 2019-20 harvest.

Wage ratio at mill level



Wage ratio at farm level



METHODOLOGY

Unless otherwise stated, all figures and results presented in this report are based on audit data collected up to 31 December 2020 and extracted from Bonsucro's database. Where appropriate and relevant to the analysis, the data has been presented in either calendar year, or in years of certification (number of years since the first year of certification, identified as year 0). Data is averaged by either calendar year or certification year and presented in a graph.

Due to the reporting timeframe, the sales data is reported a year in arrears, therefore trade data in this report is from 2019. Total production values reported for each year are based on the updated production volume data for each certified entity in each year, even if the reporting period for this production volume falls partially outside of the corresponding calendar year. As such, volume figures should be treated as approximate. Data and results are likely to change year on year due to the fact that data is reported across the year and integrated into the database when it comes in.





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