



**MONITORING THE
SCOPE AND BENEFITS
OF FAIRTRADE:
SUGAR**

Monitoring Report 10th Edition



FAIRTRADE
INTERNATIONAL



About Fairtrade International

Fairtrade International is a non-profit, multi-stakeholder association that promotes fairer conditions for international trade, empowers small-scale farmers and workers, and fosters sustainable livelihoods.

Fairtrade International develops and maintains the internationally-agreed Fairtrade Standards, owns the FAIRTRADE Mark, and supports the international Fairtrade system. Three regional Fairtrade producer networks representing 1.6 million farmers and workers co-own the international Fairtrade system, which also includes the independent certification body FLOCERT, and Fairtrade organizations in more than 30 countries that promote Fairtrade to business and consumers.

For more information, visit www.fairtrade.net



About FLOCERT

FLOCERT is a global certification body offering verification and supply chain services to ensure social and environmental standards. Founded in 2003 as the single certifier for Fairtrade, the company has six international offices, 125 employees and more than 120 auditors worldwide.

For more information, visit www.flocert.net

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Disclaimer

The monitoring data in this report are based on data collected by FLOCERT, and reported in some cases by producer organizations through the audit process and in other cases by other supply chain actors. Fairtrade International is not responsible for the accuracy of the data. The report has been compiled to the best of our knowledge and is provided for informational purposes only. Fairtrade International reserves the right to update the monitoring data as new information becomes available. The data are provided 'as is' and no warranty of any kind is given for the accuracy and reliability of the data. Fairtrade International will not be liable for any claims or damages related to the quality and completeness of the data, as far as it is permitted under law.

Cover Photo:

Saneh Lata has been a sugarcane farmer since 1984 and is a member of the Rarawai and Penang Cane Producers' Association, Fiji.

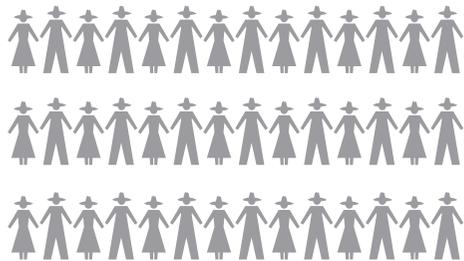
© Astra Rushton-Allan

99 SUGAR

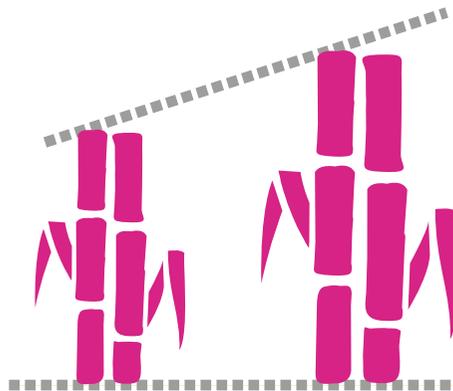
PRODUCER ORGANIZATIONS
REPRESENTING MORE THAN

54,960

FARMERS IN 19 COUNTRIES



**SALES VOLUMES
FOR FAIRTRADE
SUGAR
GREW BY 30%**



**€11.9 MILLION IN
FAIRTRADE
PREMIUM
PAID TO SUGAR PRODUCERS**



**FAIRTRADE
SUGAR FARMERS
INVESTED**

31% OF THEIR
FAIRTRADE PREMIUM



**IN AGRICULTURAL
TOOLS AND INPUTS**

1. KEY DATA: FAIRTRADE SUGAR



99 PRODUCER ORGANIZATIONS

↓ 2% since 2016



54,960 FARMERS

↑ 2% since 2016



24,270 OR 28% WOMEN FARMERS

↑ 27% since 2016



146,400 HECTARES

↓ 4% since 2016



686,800MT OF SUGAR PRODUCED BY FAIRTRADE PRODUCER ORGANIZATIONS

↓ 2% since 2016



207,400MT OF SUGAR SOLD AS FAIRTRADE

↑ 30% since 2016



€11,860,700 PREMIUM EARNED

↑ 27% since 2016

PRICES FOR SUGAR – THE “HUNGER CROP” – HIT RECORD LOW

The global sugar industry is vast and complex. Around 80 percent of the world's sugar is derived from sugarcane. It is grown by millions of small-scale farmers and plantation workers in developing countries before entering the sugarcane supply chain, which comprises factories/mills, refiners, wholesalers, traders and retailers. The role of the small-scale farmers is generally limited to the first link in the chain when they deliver their cane to the mill.

Despite holding plots of as little as just a few hectares, small-scale sugarcane farmers are important economic drivers in their rural communities. However, their position in the sugar supply chain remains very vulnerable. Developing countries producing cane sugar compete with cane and beet sugar-producing countries, some of which subsidise and protect their national sugar production. These distortions, as well as structural differences in sugar supply chains, leave small-scale farmers at the mercy of volatile market prices.

Today, with cane and sugar prices currently at their lowest level, many small-scale farmers, workers and their dependents in developing countries are living in poverty. In some countries, sugar is referred to as “the hunger crop” as those who produce the sugarcane are unable to afford nutritious food, access to health care or education for their children. In these circumstances, they are obviously unable to reinvest in their farms, improve sustainable production methods to increase their competitiveness, mitigate the effects of climate change or implement monitoring and response systems to proactively prevent issues such as child labour from occurring.

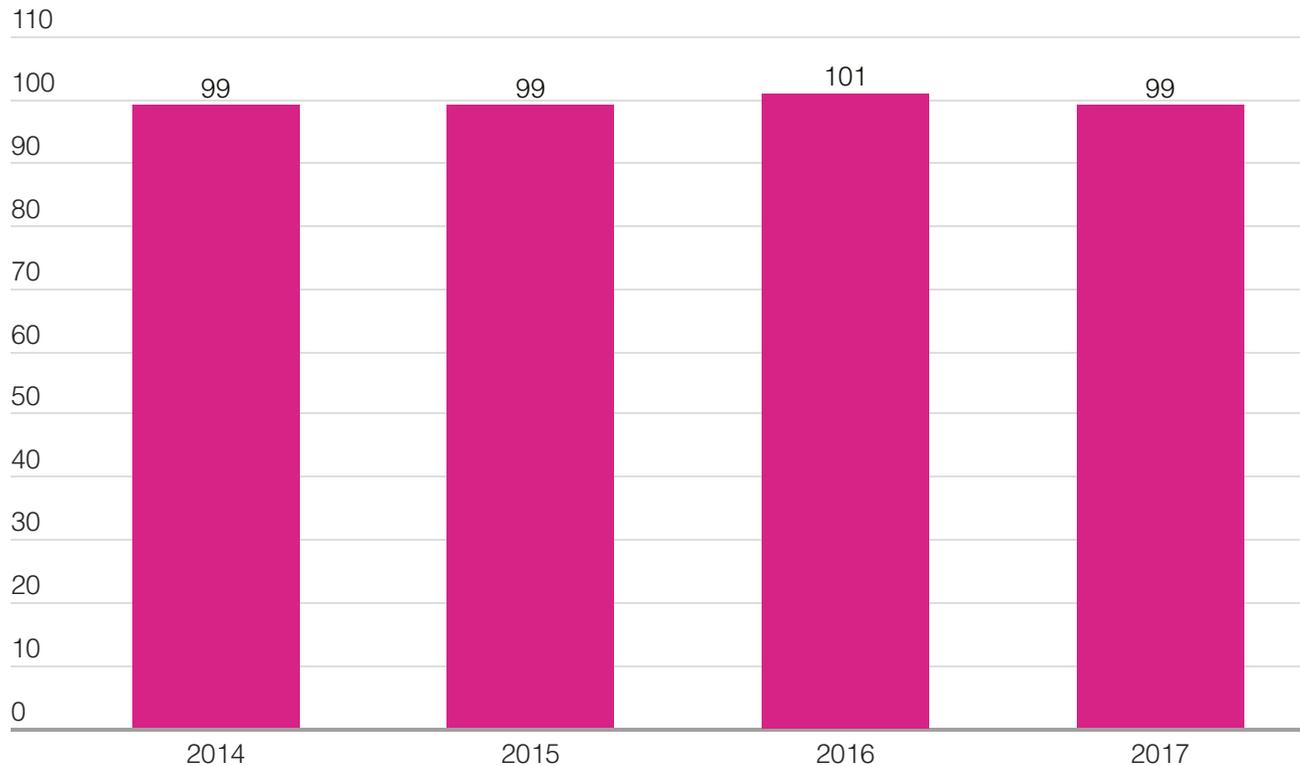
Notes:

Data from 2017.

Numbers above 10,000 are rounded to the nearest hundred.

Metric tonnes abbreviated to MT.

2. NUMBER OF FAIRTRADE CERTIFIED SUGAR PRODUCER ORGANIZATIONS 2014-2017



FAIRTRADE DRIVING THE CHANGE TOWARDS SUSTAINABLE SUGAR

In this context of volatile market conditions and vulnerable small-scale sugarcane farmers, Fairtrade is a showcase of how things can be done differently. Fairtrade Standards are open to certified small sugarcane producer organizations that are owned and governed by their members. Fairtrade sugar farms are present in 19 countries and represent nearly 55,000 farmers and 99 producer organizations. These figures have been more or less stable over the past five years, demonstrating the sustainability of the initiative. Producer organizations must comply with strict standards covering all aspects of sustainability in order to sell their produce to the Fairtrade market. In return, producer organizations are paid a Fairtrade Premium of US\$60 per metric tonne of Fairtrade sugar sold (US\$80 per tonne for certified organic sugar) to invest in sustainable production, business and environmental projects, as well as community programmes. In 2017, sugar producer organizations received nearly €12 million in Fairtrade Premium funds, an increase of 27 percent over the previous year.

Fairtrade also supports farmers to strengthen their cooperatives and provide members with certification advisory services so they can remain certified, as well as technical and marketing services to help them respond to changing demands.

Another priority for Fairtrade is to encourage producer organizations to implement Fairtrade's Youth Inclusive Community Based Monitoring and Remediation (YICBMR) system, which identifies, remediates and prevents child and forced labour. The Fairtrade certified producers in Belize implemented such a system and thanks in part to their advocacy efforts as well as their targeted public awareness campaigns; the government of Belize has taken action to address child labour in the country.

Through various interventions, Fairtrade improves conditions at origin and enable companies and brands to address risks in their sugar supply chains (*see examples of Illovo, ED&F Man and Mauritius Sugar Syndicate in further sections*).

3. FAIRTRADE SUGAR-PRODUCING COUNTRIES

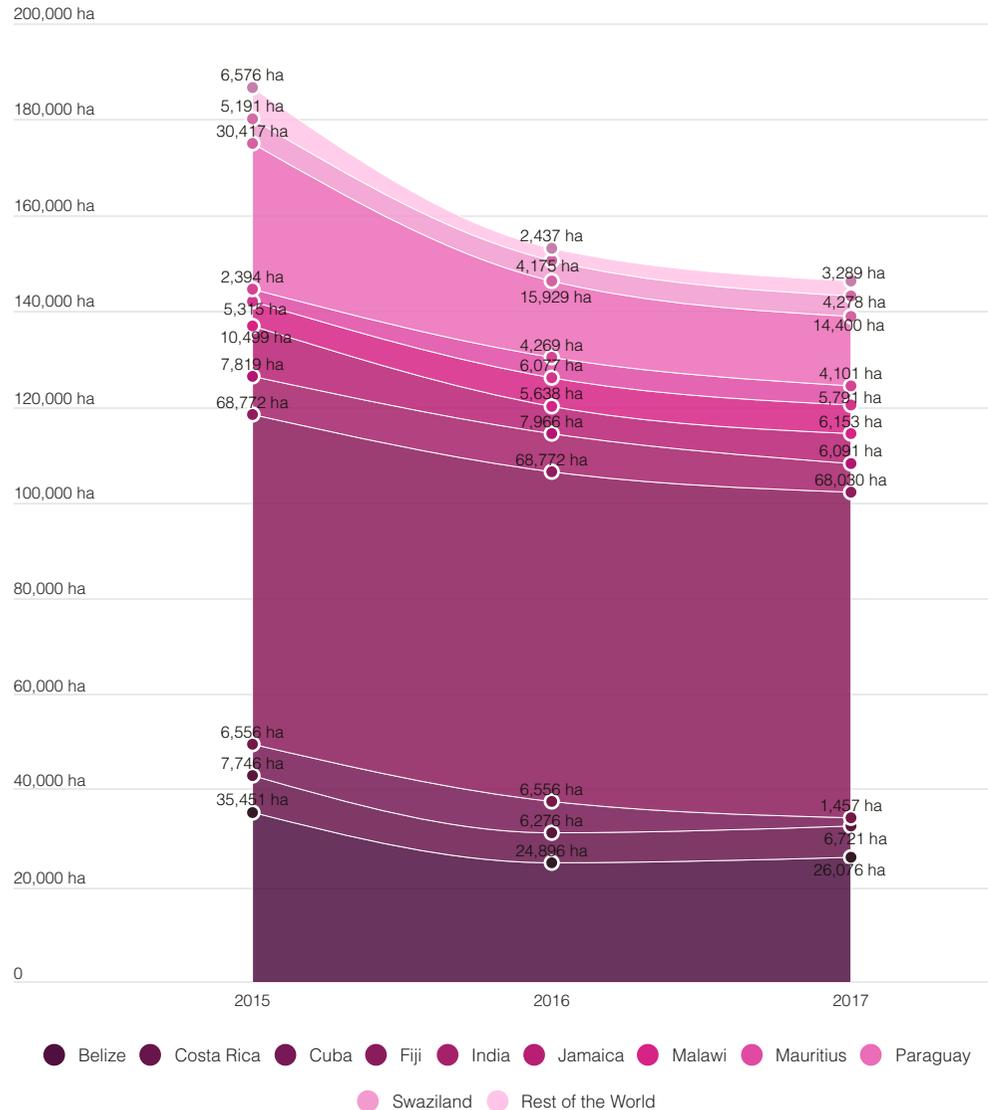
	Country	Premium received (€)	Volume sold as Fairtrade (MT)	Number of POs	Number of farmers
	Paraguay	€2,720,608	38,897MT	10	3,069
	Costa Rica	€359,576	6,740MT	5	10,194
	India	€173,364	2,432MT	9	5,095
	Rest of the World	€8,607,165	159,369MT	75	36,602
	Total	€11,860,712	207,438MT	99	54,960

Notes:

- Data from 2017.
- Where there are fewer than three Fairtrade certified producer organizations in a country, the data are aggregated into the 'Rest of the World' category to protect the organization's data confidentiality.
- Metric tonnes abbreviated to MT.
- Producer Organizations abbreviated to POs.

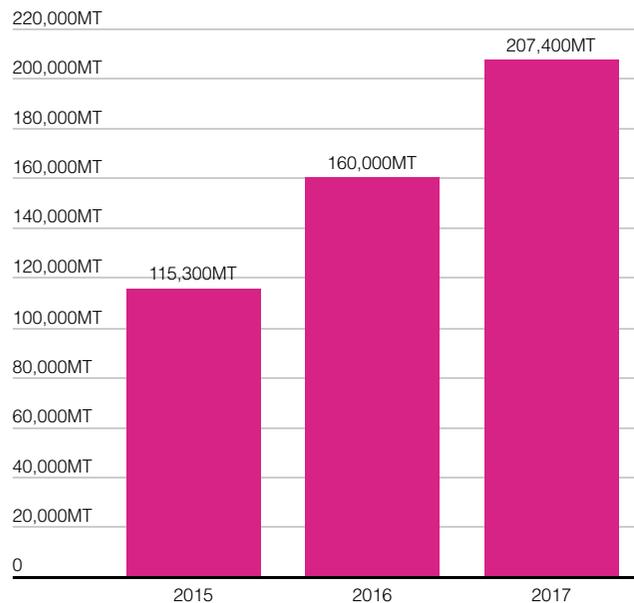
4. AREA UNDER FAIRTRADE CANE SUGAR CULTIVATION 2015-2017

In 2017, the area of land under Fairtrade sugar certification was **146,388 hectares (ha)** - greater than the metropolitan area of Berlin.



5. FAIRTRADE SUGAR SALES VOLUMES AND PREMIUM RECEIVED 2015-2017

Fairtrade sugar volumes sold (MT)



Fairtrade Premium received (€)



INNOVATIVE APPROACHES LEAD TO EXPANDING SALES FOR FAIRTRADE SUGAR FARMERS

A key priority for Fairtrade is to retain and increase sales and, where possible, explore new market opportunities. Since 2014, sugar buyers have been able to source Fairtrade sugar in bulk and use it more flexibly across product lines, including as a Fairtrade certified ingredient in a composite product (now known as Fairtrade Sourced Ingredient or FSI). These options provide the same benefits for farmers as any other sales on Fairtrade terms, but with clearer labelling options for consumers.

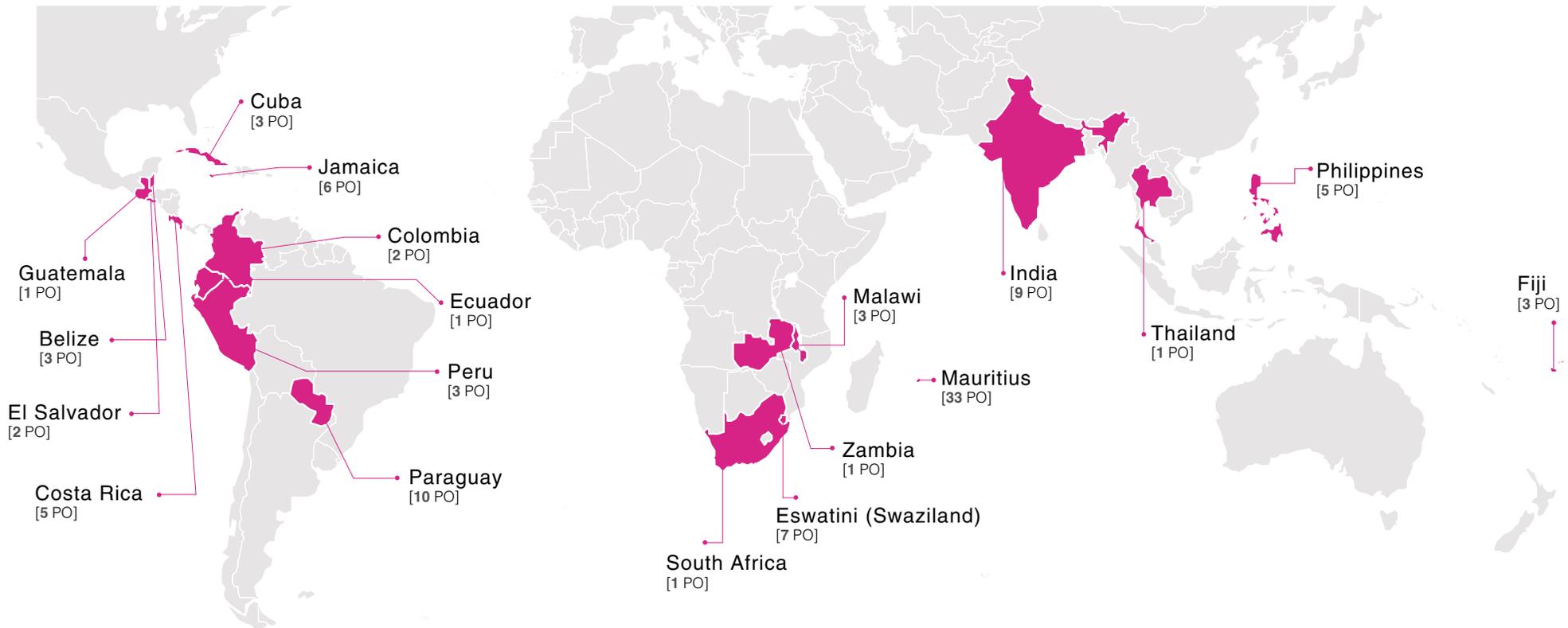
Thanks to FSI sales, a new producer support programme will be offered starting in 2019 benefitting Fairtrade certified producers in Belize, Fiji and Mauritius. As part of the programme, sugarcane farmers in these countries have been able to choose projects most relevant to their specific situations. Some of the projects include moving to 'climate-smart' cane production, adopting better agricultural practices, and improving labour practices to strengthen human rights in the sugarcane supply chains by organizing trainings to prevent and eliminate child and/or forced labour. These programmes are all relevant both to the producers and to the buyers and brands sourcing from these countries.

Another important opportunity lies in developing south-to-south trade ties for Fairtrade sugar. Region and country specific Fairtrade Premium levels have been piloted to stimulate demand for Fairtrade cane sugar in the countries where it is grown. For India, one of the largest sugar-producing and consuming countries, the Fairtrade Premium for sugar destined for the domestic market has been established at 1,000 Rupees (currently US\$15) per tonne. The same model has also been applied in Southern Africa, where the domestic Fairtrade Premium level is ZAR600 (currently US\$42) per tonne.

Fairtrade is also looking into income diversification options for sugarcane farmers, namely in the biomaterials and biofuel sector in collaboration with the Roundtable on Sustainable Biomaterials (RSB).

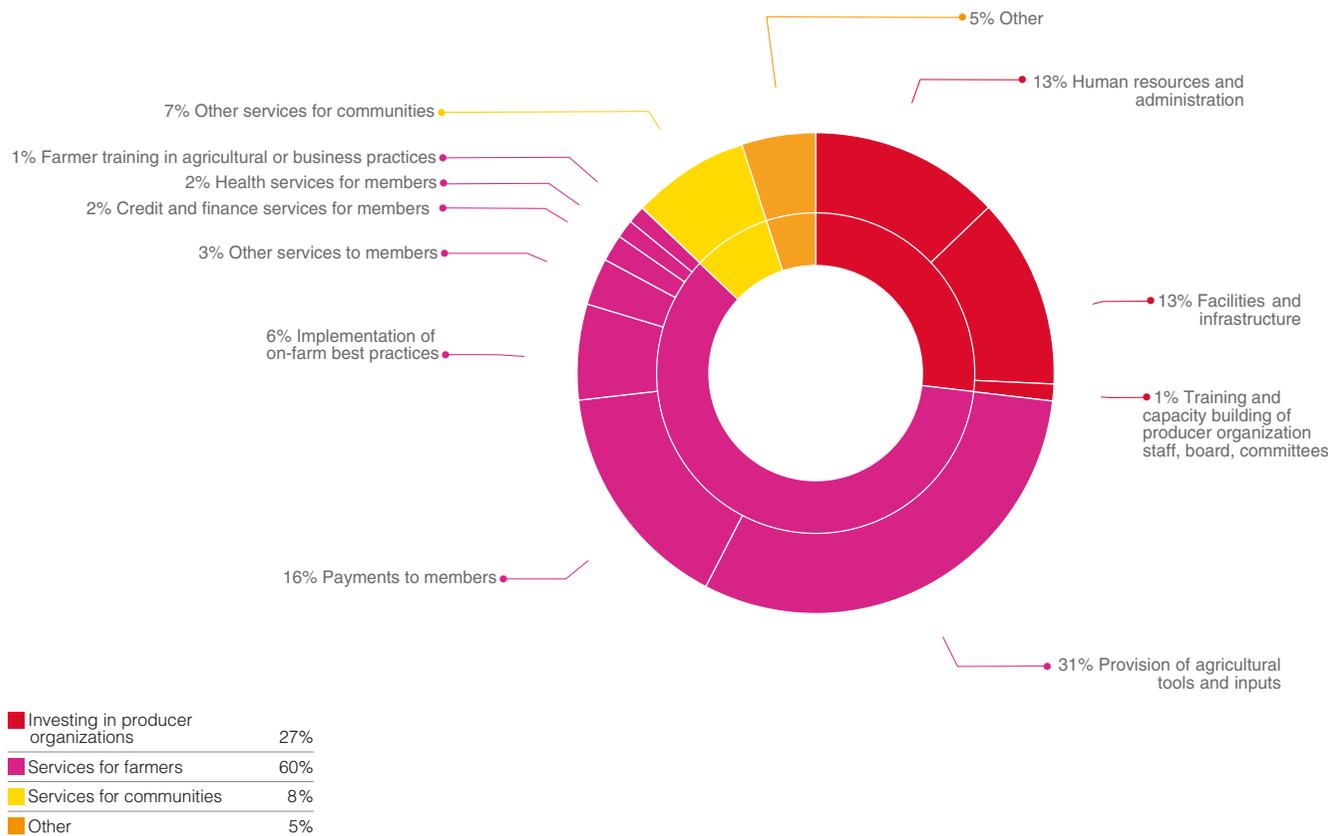
Note:

Data rounded to the nearest hundred.



NINETEEN COUNTRIES WITH FAIRTRADE SUGAR CERTIFICATION

6. FAIRTRADE SUGAR PREMIUM USE IN SMALL-SCALE PRODUCER ORGANIZATIONS 2016-2017



FAIRTRADE PREMIUM IMPROVING GOOD AGRICULTURAL PRACTICES (GAPs)

Sugar farmers see the Fairtrade Premium as an opportunity to finance change and drive impact on their farms and in their communities (see pages 13-15).

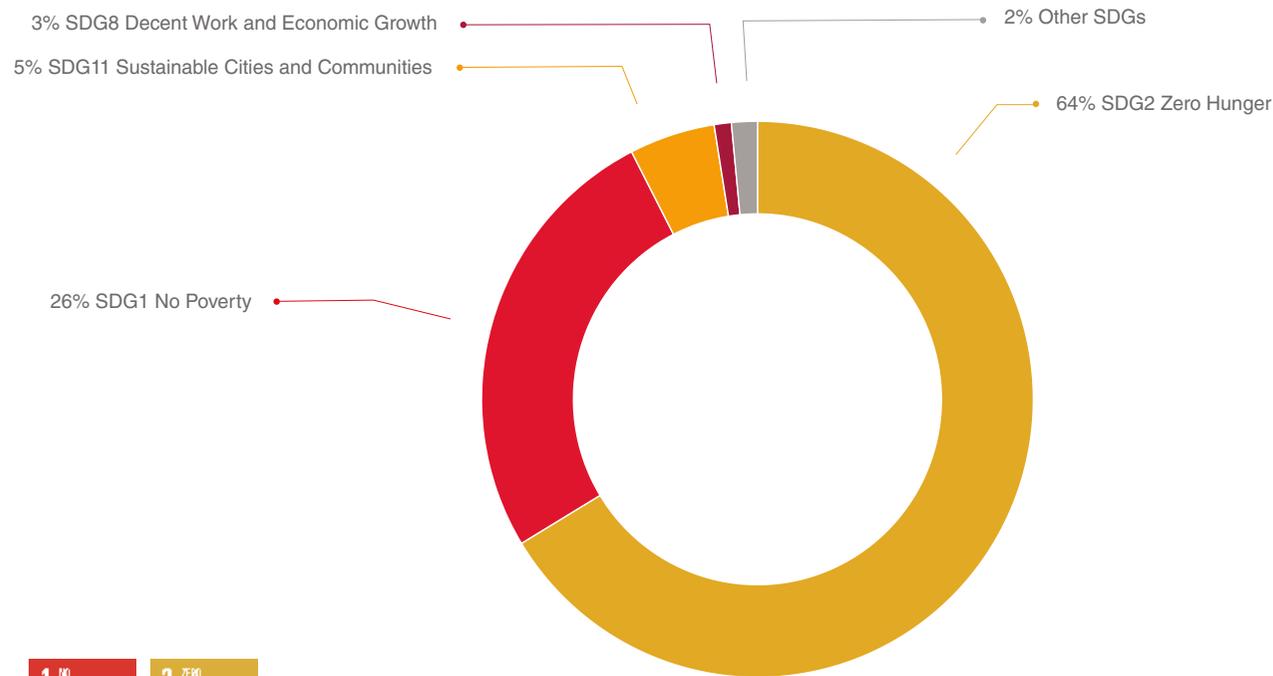
Given the scenario of low sugar prices and widespread poverty described earlier, it's not surprising that Fairtrade farmers channel most of their Premium into improving good agricultural practices (GAPs) and buying equipment to speed up deliveries to the mills.

In 2017, the majority of Fairtrade Premium investment (60 percent) was on services for farmers. The major categories included the provision of agricultural tools and inputs, including fertilizers, pesticides, and health and safety equipment. This was followed by payments to members, which also included cash disbursements and some small welfare payments. Services to farmers included investment in implementing good agricultural practices (GAPs) such as land rehabilitation programmes and replanting.

In terms of investment in producer organizations, most of the Fairtrade Premium was spent on infrastructure (including crop transportation and storage), and human resources and administrative expenses.

Note:
Percentages may not sum due to rounding.

7. FAIRTRADE PREMIUM USE IN RELATION TO THE UN'S SUSTAINABLE DEVELOPMENT GOALS (SDGS)



HOW FAIRTRADE PREMIUM USE CONTRIBUTES TO THE SDGS

Fairtrade Premium investments made by sugar producers contribute to many of the UN Sustainable Development Goals. Our analysis of Fairtrade's impact relative to the SDGs continues to evolve. While most activities can apply to more than one SDG, we are mapping each category of spending to a single SDG for the sake of simplicity.

SDG 1 (no poverty) is central to Fairtrade's mission. Most of the Fairtrade Premium spending towards this goal related to direct cash disbursements to members and small welfare payments. These reduce households' out-of-pocket expenses and supplement incomes.

SDG 2 (zero hunger) aims to end hunger, achieve food security and improved nutrition, and promote sustainable agriculture. Sixty-four percent of Fairtrade Premium spending by the producers contributed to this goal. Spending on the provision of the right type and amount of fertilizers and pesticides, and infrastructure were all aimed at promoting sustainable agriculture.

SDG 11 (sustainable cities and communities) aims to make cities and human settlements inclusive, safe, resilient and sustainable. Five percent of the Premium investments in community infrastructure, social and economic services related to vulnerable groups of the community contributed to this goal.

SDG 8 (decent work and economic growth) aims to promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all. Three percent of the Premium was spent on activities related to this goal and included loans for business development and support for hired workers on farms.

RESEARCH INSIGHT

EVALUATION AND BASELINE RESEARCH WITH SMALL PRODUCER ORGANIZATIONS PRODUCING FAIRTRADE SUGAR: BELIZE COUNTRY REPORT

Belize has three sugarcane-producing organizations, with the most recent one being certified in 2011. They represent 5,290 farmers covering an area of 26,076 hectares. Fairtrade commissioned a baseline study among sugar farmers in Belize to assess the effectiveness of Fairtrade interventions to improve the economic, social and environmental sustainability of sugar production.

Belizean farmers generally consider sugar growing as part of their culture. It has remained the primary livelihood of thousands of families for several generations. As a result, there was strong resistance to altering practices regarded as intrinsically linked to the local culture. Fairtrade presented a defined set of performance criteria involving new ways of doing things which challenged this mindset. Overall, there was a high level of satisfaction with Fairtrade among the respondents in Belize, especially with regard to the Premium and the social projects undertaken in the region.

“Working with Fairtrade has alleviated the monetary risk aversion as the Premium has been used to cushion this. This has broken down the psychological resistance to change. Without this partnership with Fairtrade many new technologies would not have been introduced and mainstreamed in Belize. Fairtrade has become synonymous with the sugar industry in Belize and many believe that without its interventions, the sector would not be where it is today.”

According to a representative of the country’s sugar research institute, SIRDI (Sugar Industry Research and Development Institute).

While the research points to many positive aspects, there are areas for improvement. Low productivity and the high cost of production for Belizean growers should become a central focus for the sugar industry in the coming years. Learning from other industries, in areas such as cost efficiencies and initiatives to increase productivity, could help the sugar industry in Belize.

RMI Services Ltd. and Overseas Development Institute (Forthcoming 2019).



Sugar cane fields at sunset. Belize Sugar Cane Farmers Association (BSCFA).

© James A. Rodríguez

SUSTAINABLE SUPPLY CHAIN PERSPECTIVE:

ASSOCIATION OF SUGAR TECHNICIANS

Cuba is one of the Fairtrade sugar origins. It has four certified organic sugar cooperatives and one mill. This supply chain has recently been certified for physical traceability.

The Cuban Association of Sugar Technicians (ATAC) is a partner of Fairtrade in Cuba and the Fairtrade certified supply chain. The Fairtrade Premium has also played a crucial role in helping maintain organic production of sugarcane in Cuba.

“The organic project was about to go under between 2010-2013, but thanks to the investments made with the Fairtrade Premium we have been able to keep it alive. The producers have also been able to purchase tractors and repair old vehicles, as well as buy office materials, such as computers and printers, that help improve the work of the cooperatives.”

Manuel Alonso Padilla, Secretary of International Relations and Projects, Cuban Association of Sugar Technicians (ATAC)



Sugarcane farmers in Cuba - including members of UBPC Bermejil, one of the Fairtrade certified producer organizations on the island - have been able to invest their Fairtrade Premium in storage and warehousing facilities as well as machinery.

© José Luis Casuso, CLAC

SUSTAINABLE SUPPLY CHAIN PERSPECTIVE:

ILLOVO SUGAR AFRICA (PTY) LTD.

Sugar farmers see the Fairtrade Premium as an opportunity to finance change and drive impact on their farms and in their communities.

Ilovo Sugar Africa (Pty) Ltd. is a major exporter of Fairtrade sugar worldwide. The group was one of the first companies to sell sugar from Fairtrade certified producer organizations in Malawi and Zambia. Ilovo is fully owned by the Associated British Foods plc, listed on the London Stock Exchange.

“Sustainability in our supply chains is paramount to our business and this is one of the reasons why Ilovo has been supporting Fairtrade certified growers for more than 15 years now.”

One of the main advantages of Fairtrade is the combination of world-class standards applied at grower level with the Fairtrade Premium paid on top of the sugar price. The fact that the Premium can be reinvested into the cooperative is a great competitive advantage for smallholders.

Investing in productivity is often expensive and smallholder organizations in Malawi or Zambia do not always have access to finance. By investing their Fairtrade Premium into production, cooperatives like Phata in Malawi are securing the future of their business and of their communities.”

Benjamin Cousin, Sustainability and Development Manager, Ilovo.

One of the cooperatives that Ilovo sources from is Phata Sugarcane Outgrowers Cooperative Society Ltd. Over the past three years, the cooperative has reinvested around 50 percent of its Premium in its operations, ensuring that the business remains compliant with international standards and its business model is sustainable into the future. Their Premium-funded projects include, among others, access to water for irrigation, farm operations, health and safety infrastructure, construction of a maize mill and provision of access to water and food security. All these investments contribute to UN SDG2 which aims to end hunger, achieve food security and promote sustainable agriculture.

SUSTAINABLE SUPPLY CHAIN PERSPECTIVE:

ED&F MAN INGREDIENTS

ED&F Man Ingredients is a global trader of agricultural products, including sugarcane. The company has been sourcing Fairtrade certified sugarcane for over a decade from various origins. Thanks to the Fairtrade Premium for sugar sold on Fairtrade terms, the sugar farmers have been able to invest in storage and warehousing facilities, organically-approved fertilizers and inputs, as well as machinery. Having safe, watertight and controlled storage areas allows the farmers to protect their crop against weather and security risks. This, in turn, gives them control over their production which means they can offer their clients more reliable and sustainable output.

“This is essential for the farmers. It allows them to improve their farming methods, increase output and increase their income. It is also very important to clients in destination markets who demand products that are being grown sustainably. Clients are reassured that the farmers have measures in place to support their production and to deliver a sustainable, reliable supply.”

Daniel Polak, Commercial Director, ED&F Man Ingredients

SUSTAINABLE SUPPLY CHAIN PERSPECTIVE: MAURITIUS SUGAR SYNDICATE

From modest beginnings in 2009, Mauritius is now one of the leading Fairtrade sugar-exporting countries in the world. There are currently more than 30 Fairtrade certified smallholder organizations in Mauritius, producing diverse types of sugars, including white refined and various types of special sugars. The country has been very successful in marketing its Fairtrade sugar, mostly thanks to the efforts of the non-profit Mauritius Sugar Syndicate (MSS). MSS is the sole organization responsible for the marketing of sugar produced in the country, and all the sugarcane growers on the island are members of it

“To say that the Fairtrade Premium has buttressed farmers’ income at a time when the price of sugar is at a record low would be an understatement. Indeed, with the accelerated volatility of market prices, especially following the abolition of EU sugar production quotas in 2017, the share of the Fairtrade Premium that goes to planters is increasingly becoming their viability safeguard.”

By building their resilience to external economic shocks and contributing to an improvement in yields through the continuous monitoring of good agricultural practices, Fairtrade has not only helped maintain many of our small growers in cane cultivation but has also ensured a regular cane supply to the mills,” said Devesh Dukhira, CEO of MSS.

Although the recent Fairtrade decertification of some small-scale producer organizations has curtailed sales growth in Mauritius, the industry is committed to turning things around. MSS, whose ability to sell as much sugar as possible on

Fairtrade terms was jeopardized, is drawing up a plan to engage more actively with the relevant producers to ensure they embrace the Fairtrade compliance processes and subsequently maintain their respective certifications. This should allow MSS, which has already sold some 200,000 tonnes of Fairtrade sugar since becoming certified, to continue tapping its growing sales opportunities for the benefit of Fairtrade certified producer organizations and their members.

“In these troubled times for the global sugar business, there seems to be a growing buzz around the certified groups in Mauritius, with more and more farmers attracted to the sustainable haven Fairtrade is increasingly perceived to be,” adds Devesh Dukhira, CEO of MSS.

This view is echoed by Sooriadeho Punchu, Secretary of l’Espérance CCS, one of the first five cooperatives that acquired Fairtrade certification in 2009.

“It would have been unfeasible for small sugarcane planters to think beyond sugarcane had it not been for the Premium-funded investment schemes. These incentivized them to diversify into other crops and broaden their income base. As a result, their dependency on mono-cropping was reduced and a wider range of products was made available to the community.”



Sugarcane fields in Mauritius. The island has become one of the leading Fairtrade sugar-exporting countries in the world.
© Mauritius Sugar Syndicate (MSS)

SUSTAINABLE SUPPLY CHAIN PERSPECTIVE:

ASR GROUP

Tate & Lyle Sugars and [ASR Group](#) have been working with Fairtrade since 2008. Since then, Fairtrade sugar sales by ASR Group have generated over US\$60 million in Fairtrade Premium for certified producer organizations.

“We recognize that the principles of Fairtrade are an effective tool to support small-scale farmers. With Fairtrade, we contribute to the empowerment of cane farmers in producer organizations in Belize and elsewhere,” states Julia Clark, Director Sugar Ethics, Tate & Lyle Sugars (ASR Group).

All smallholder cane farmers in Belize are members of the three Fairtrade producer associations. Fairtrade certified since 2008, the Belize cane farmer associations have invested in projects to ensure the compliance of their members with the Fairtrade standards, and to improve livelihoods in their communities. Currently key project themes are child and forced labour prevention, health and safety in the fields, gender equality, community health, biodiversity and farmer productivity.

Most tasks in cane farming, and particularly harvesting, are considered hazardous for anyone under the age of 18. Globally, sugar cane farming is associated with poor health and safety practices, and child and forced labour. As a result, the industry is forced to try to implement higher standards itself, with limited support from government.

“Particularly with regards to child and forced labour prevention, we have witnessed the significant impact that Fairtrade had in Belize,” says Julia Clark.

“Fairtrade has strict standards on prohibiting child and forced labour - for example, no child under the age of 15 can be employed, and no child under age 18 can be employed in hazardous tasks. Fairtrade standards for small producer organizations also strictly prohibit the use of forced or bonded labour. ASR Group Supplier Code of Conduct has similar stipulations on child and forced labour, consistent with Fairtrade and ILO standards,” she adds.

Fairtrade cane farmer associations and the industry institutions have worked to create a good understanding of

the concept of child labour across the industry and a system is in place to monitor compliance in operational areas of each of the three producers' associations. Additionally, the largest cane farmer association, BSCFA, have set up a youth inclusive community based monitoring and remediation (YICBMR) system to prevent, detect and address instances of child labour. BSCFA plays an active role in advocacy and currently sits on the Belize government's committee to strengthen national legislation so that the burden of compliance does not sit entirely with the cane farmers' associations.



Emmanuel Hall, Extension Officer at Belize Sugar Cane Farmers Association

© Tate & Lyle Sugars (ASR Group)

ABOUT THE DATA IN THIS REPORT

This report has two sources of data.

CODImpact is the data collected from producers during the audits. Since not all producer organizations are audited each year, the data is completed using the last available record. This is the data source for production volume, area of cultivation, number of farmers and workers, and Premium usage.

The second source of data is FLOTIS. This is the data collected from all Premium payers for all transactions in a given year for Fairtrade sales and Premium generated. The data has been extensively checked and cleaned. However, in a monitoring project of this magnitude there may be some areas of inaccuracy, such as:

- There may be missing information from Fairtrade certified producer organizations that is not taken into account because of quality.
- There may be missing information in some questionnaires from certified producer organizations that was not reported by auditors.
- There may be wrong data or data that were not validated.

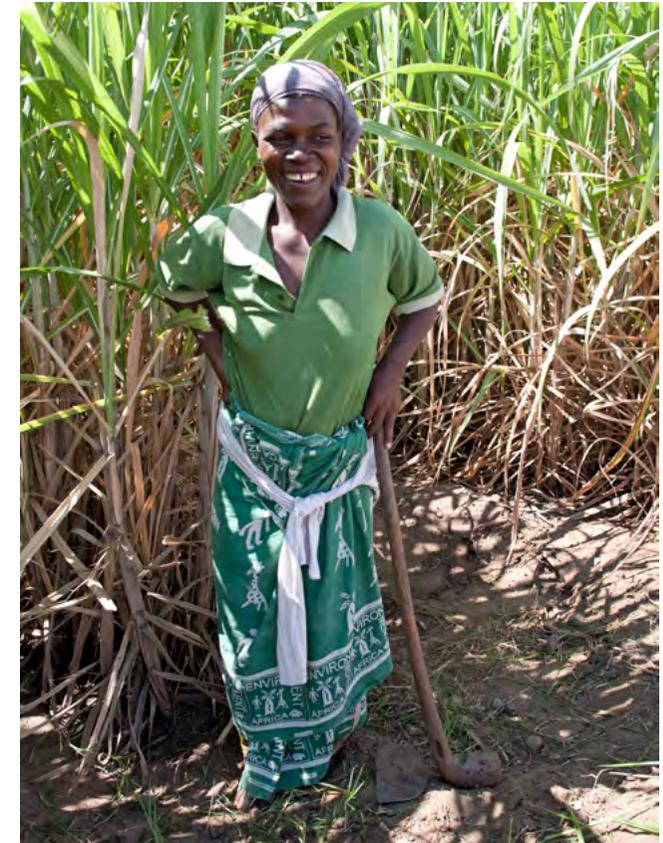
The number of certified organizations is counted as the number of producer organizations at the end of the year with any of the following certifications statuses: certified, suspended or permission to trade.

Data on volumes produced, volumes sold and Fairtrade Premium income and expenditure are retrospective for a 12-month period preceding the audit. Since the majority of the audits for this data set took place during 2017, the majority of producer organizations have reported on time periods spanning 2016–2017. We thus use '2016–17' to describe these data in the report.

Under the terms of confidentiality agreements with Fairtrade producer organizations, data may be publicly reported in aggregate form, but not used in ways that expose data belonging to a single producer organization, Fairtrade Premium payer or trader. Where there are fewer than three Fairtrade certified producer organizations in a country, and market-sensitive business information could be deduced, we do not report aggregated data on the producer organizations.

DISCLAIMER

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Eunice Bisiwasi, a member of Kasinthula Cane Growers' Association in Malawi.

© Anette C. Kay



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