International Cost Benchmark

Data as at 30th October 2026

Market Intelligence Division (MID), Strategy & Performance Management Department, National Sugar Development Council

Restricted: contains facility-level productivity data for one named estate and the Council's own project financial model. Internal use only.

SUGAR PER HECTARE, NIGERIA	AFRICAN BENCHMARK	OPERATING COST, MODELLED	OPERATING COST, MEASURED
1.88 t	**10.68 t**	**$443**	**$1,490**
DSR Numan, 2025/26	Eswatini, fully irrigated	per tonne of sugar	per tonne, against a price of $850

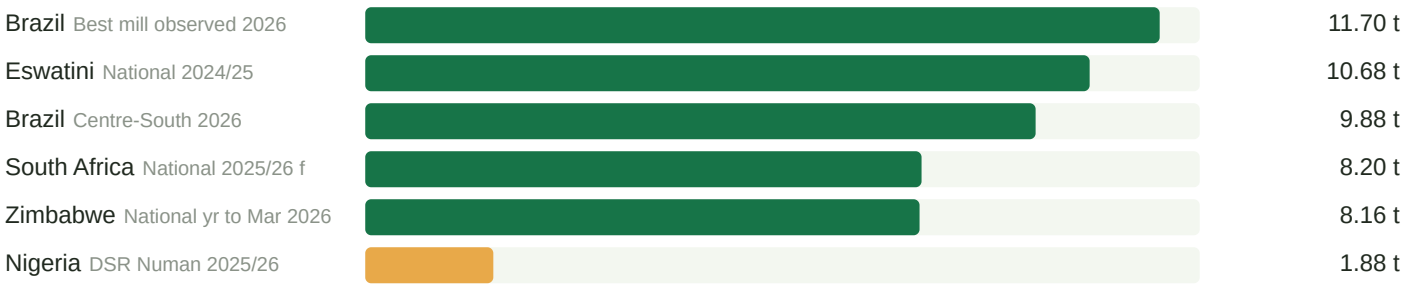
Ex-refinery parity for imported raw is ₦917 per kg (H1 2026). Costs in US dollars are the estate model's own output at ₦1,400 to the dollar. Parity is in naira because it is built from customs declarations.

What the benchmark says

- A hectare of Nigerian cane produces 1.88 tonnes of sugar. Eswatini produces 10.68, South Africa 8.20 and Zimbabwe 8.16. Nigeria is about four times behind the African average.
- Roughly half the loss is inside the factory. Cane arrives at 10.52% sucrose. The mill extracts 62.7% of it (norm 93 to 96%) and the boiling house converts 77.0% of what survives (norm 85 to 90%). Rendement ends at 5.08%.
- The Council's estate model assumes 110 tonnes of cane a hectare, 96% mill extraction and 10.06% rendement, which is 11.06 tonnes of sugar a hectare, 5.9 times the measured figure. At measured performance operating cost goes from US$443 to US$1,490 a tonne against a sugar price of US$850, and EBITDA from +US$55.2m to -US$22.9m.
- Importing and refining is a different business. A tonne of refined sugar made from imported raw costs about ₦917 per kg at the refinery gate, of which ₦119,320 a tonne of raw is tax. That is a trade policy number, not an agronomy one.

Sugar per hectare harvested

Yield multiplied by recovery. Nigeria is shown in gold. Latest season available for each.



The figures

COUNTRY	BASIS	YIELD T/HA	RECOVERY	SUGAR T/HA ▼
Brazil	Best mill observed 2026	90.0	13.00%	11.70
Eswatini	National 2024/25	89.3	11.97%	10.68
Brazil	Centre-South 2026	76.0	13.00%	9.88
South Africa	National 2025/26 f	70.4	11.65%	8.20
Zimbabwe	National yr to Mar 2026	81.0	6.61%	8.16
Nigeria	DSR Numan 2025/26	36.9	5.08%	1.88

Where the sucrose goes, Nigeria

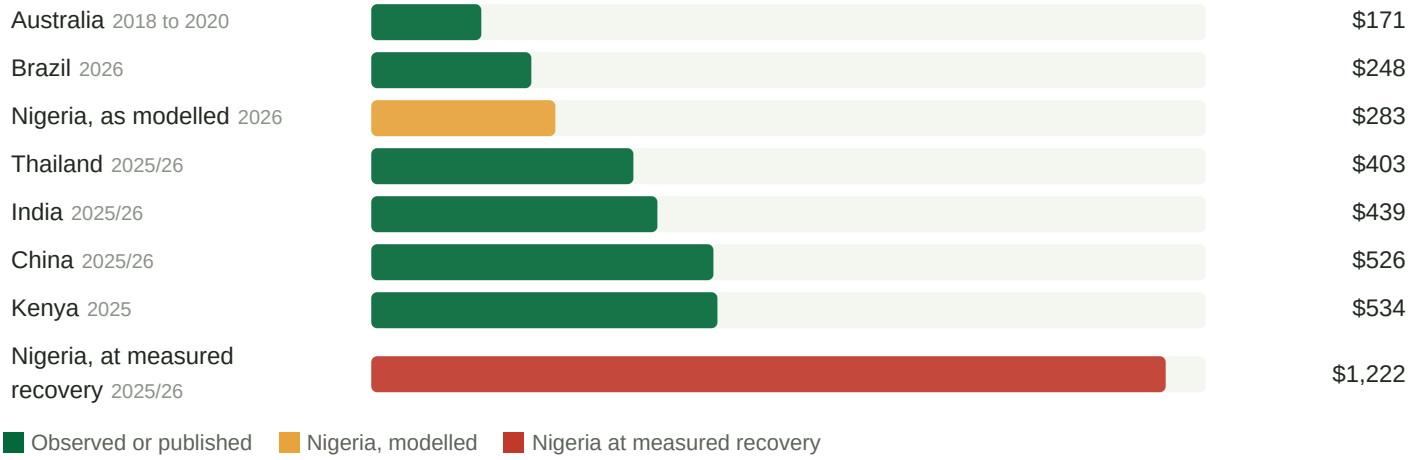
Per cent of cane by mass, for the one reporting estate. The cane is weak but workable. Almost half of what arrives is lost inside the factory.

STEP	% OF CANE
Sucrose in the cane	10.52
Lost in milling	-3.92
Lost in the boiling house	-1.52
Sugar produced	**5.08**

Mill extraction is 62.7% against an industry norm of 93 to 96%. Boiling house recovery is 77.0% against 85 to 90%.

Cane cost per tonne of sugar

No country in this set publishes a full cost of production except Brazil. What several publish is the cost or price of cane, about 60% of the cost of sugar. Dividing it by recovery gives a cane cost per tonne of sugar. US dollars per tonne of sugar.



The working

Cane cost per tonne of sugar = cane cost per tonne of cane divided by recovery.

COUNTRY	$/T CANE	RECOVERY	$/T SUGAR	VINTAGE	WHAT THE CANE FIGURE IS
Australia	$24.46	14.30%	$171	2018 to 2020	BDO survey of 13 Queensland mills, A$35.45 a tonne of cane
Brazil	$32.23	13.00%	$248	2026	Pecege survey of production cost, R$166 a tonne of cane
Nigeria, as modelled	$28.42	10.06%	$283	2026	Estate financial model, agricultural cost
Thailand	$44.00	10.93%	$403	2025/26	Cane board cultivation cost, about 1,358 baht a tonne
India	$41.70	9.50%	$439	2025/26	Fair and Remunerative Price, INR 355 a quintal, statutory
China	$70.00	13.30%	$526	2025/26	Guangxi government purchase price, RMB 490 to 540 a tonne
Kenya	$44.57	8.35%	$534	2025	Regulated price paid to growers, KSh 5,750 a tonne
Nigeria, at measured recovery	$28.42	5.08%	$1,222	2025/26	Same cane cost, measured rendement of 5.08 per cent

What it says

- The average across the six observed countries is about $387 a tonne of sugar for the cane alone, from $171 in Australia to $534 in Kenya.
- Nigeria as modelled is $283, below that average. At measured recovery (5.08% instead of 10.06%) it is about $1,222, more than double the worst observed country and 3.2 times the average.
- Both terms matter. China has nearly the best recovery (13.3%) but pays growers US$67 to 74 a tonne of cane, so it comes out at $526. Australia wins on both counts. Kenya loses on both.

Caution: these are not the same kind of number. Australia and Brazil are surveys of what production costs. Thailand is an official cost estimate. India, China and Kenya are administered prices paid to growers, which include the grower's margin. Nigeria is a financial model. Australia is 2018 to 2020 money, the rest 2025 or 2026. Read this as orders of magnitude, not a cost ranking.

Operating cost per tonne of sugar, local production

The Council's own estate financial model, recalculated. The base case reproduces the stored results exactly. US dollars at ₦1,400 to the dollar.



COST LINE	$ PER TONNE	SHARE
Agriculture	$282.58	63.8%
Factory	$93.02	21.0%
Administration	$52.14	11.8%
Distillery	$15.16	3.4%
Operating cost per tonne of sugar	**$442.90**	**100%**

Estate against refinery, as modelled

PART OF THE COST	$ PER TONNE OF SUGAR
Estate, growing the cane	$282.58
Milling, extraction and power plant	$51.21
Refining, sugar plant and refinery	$41.81
Administration and marketing	$52.14
Distillery	$15.16

Refining inside this integrated estate costs about US$41.81 a tonne (about ₦58,500) because bagasse supplies the steam free. The imported-raw refinery in the next section carries ₦139,870. About 2.4 times. The two have never been reconciled and should be before either is quoted.

What changes when measured figures go in

Only four inputs were changed: cane yield, pol per cent cane, mill extraction and boiling house recovery.

MEASURE	AS MODELLED	AT MEASURED
Cane yield, tonnes a hectare	110	36.9
Pol per cent cane	12.2%	10.52%
Mill extraction	96.0%	62.7%
Boiling house recovery	85.8%	77.0%
Rendement, sugar per cent cane	10.06%	5.08%
Sugar per hectare	11.06 t	1.88 t
Land to feed the same mill	9,579 ha	28,554 ha
Sugar produced	105,331 t	53,250 t
Operating cost per tonne of sugar	$442.90	$1,490.00
Cost net of by-products	$326.02	$1,279.40
Margin per tonne of cane	+$52.70	−$21.83
EBITDA	+$55.2m	−$22.9m
Project capital	$260m	$477m

- Agriculture more than quadruples ($283 to $1,222 a tonne of sugar) because the same mill needs about three times the land for half the sugar. Feeding a 7,000 tonne a day mill takes 9,579 ha at modelled yield and 28,554 ha at measured yield.
- Once EBITDA turns negative the financial outputs stop meaning anything. The figures worth quoting are cost per tonne and the physical outputs.
- The model's sensitivity table tests yield and recovery at plus and minus 10%. Measured yield is 66% below assumption and rendement 49% below, so it does not reach the observed position.

Operating cost at measured performance



COST LINE	$ PER TONNE	SHARE
Agriculture	$1222.12	82.0%
Factory	$144.34	9.7%
Administration	$94.79	6.4%
Distillery	$28.75	1.9%
Operating cost per tonne of sugar	**$1490.00**	**100%**

From Brazil to the refinery gate

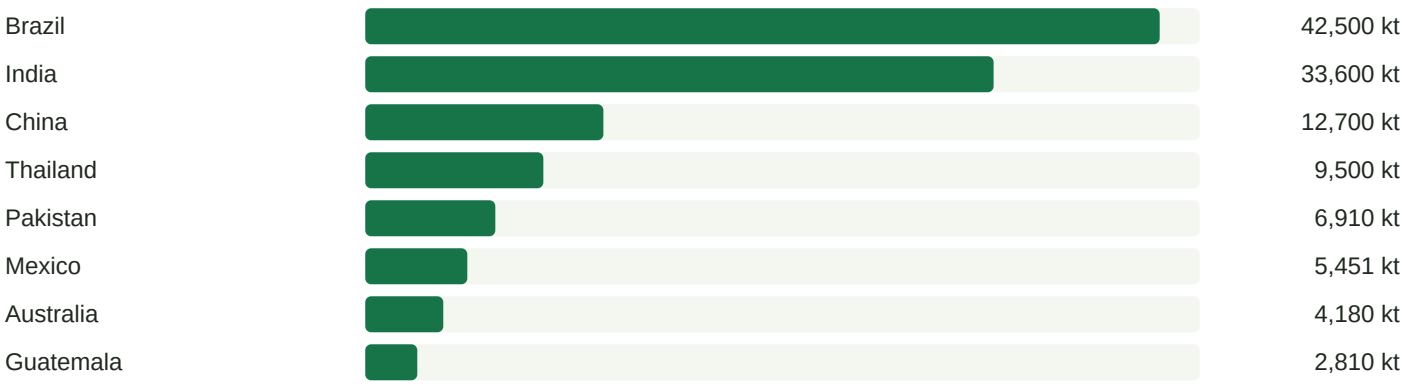
What it costs to land a tonne of raw sugar in Nigeria and refine it. First half of 2026, built from 91 customs declarations. Naira per tonne of raw sugar unless the line says otherwise. Cost only: margins are not in this brief.

LINE	₦ PER TONNE	WHERE IT COMES FROM
Cost, insurance and freight at the border	520,269	Read from 91 customs declarations
Duty and levy paid	119,320	Declarations. An effective rate of 22.9 per cent
Port, terminal and clearing (estimate)	42,000	Catalogue value, pending CS-04
Inland haulage, port to refinery (estimate)	18,000	Catalogue value, pending CS-04
Financing (estimate)	31,000	Catalogue value, pending CS-05
Landed cost of raw at the refinery gate	**730,589**	
Raw carried into one tonne refined, at 94% refining yield	**777,347**	**1.064 tonnes of raw per tonne refined**
Refining cost (estimate)	139,870	Catalogue value. The estate model puts refining at about ₦58,500
Ex-refinery parity, refined	**917,217**	**₦917.22 a kilogramme**

- **Estimates:** ₦91,000 a tonne (port, haulage, financing) is catalogue value, not measured. With refining at ₦139,870 the four estimated lines come to ₦231,000 a tonne of refined sugar. Refining is a CS-02 matter, not a port one, so ₦231,000 should not be quoted as post-clearance exposure.
- **Tax is observed:** ₦119,320 a tonne of raw, an effective rate of 22.9%, read from the declarations. Of the ₦730,589 landed cost of raw, the rest is the world price, freight and the exchange rate.
- This is a trade policy number, not an agronomy one. It must not be averaged with the estate cost.

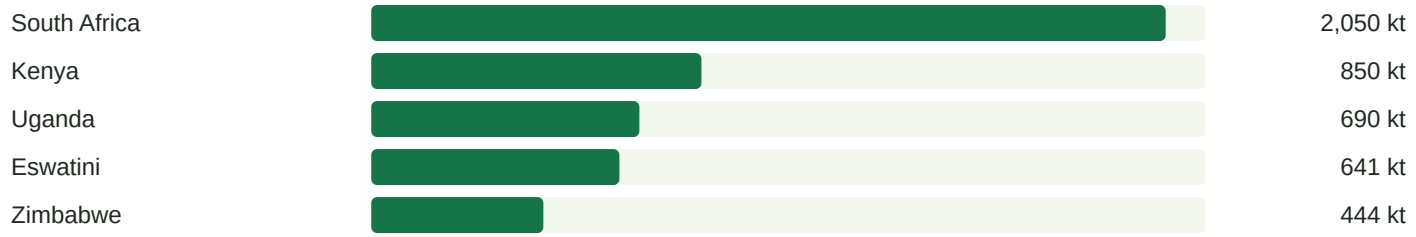
Who produces what

USDA FAS, Sugar: World Markets and Trade, May 2026, marketing year 2026/27. Thousand tonnes, raw value. Egypt is excluded under the cane-only rule (about 64% of its output is beet), so Colombia is in the top ten.





Assembled country by country. Not a top ten. Not yet sourced to a publishable figure, so left out rather than estimated: Sudan, Zambia, Malawi, Mozambique, Tanzania, Ethiopia, Mauritius, Nigeria.



Country notes

What bears on cost for each country, sorted by sugar per hectare. Click a country to open it.

COUNTRY	REGION	SUGAR T/HA	YIELD T/HA	RECOVERY	PRODUCTION
Eswatini	Africa	10.68	89.3	11.97%	641,000 t, 2024/25
Land and water	60,000 ha harvested, fully irrigated. The reason it is the right target for a Backward Integration Programme estate and Brazil is not.				
Structure	The Eswatini Sugar Association markets all sugar and molasses and shares revenue with growers under the Sugar Act 1967.				
Grower payment	Revenue share under the Act. The split itself is not published.				
Energy	Electricity is the second highest production cost after transport. Tariffs rose 8 per cent in April 2025 with a further 8 per cent set for April 2026.				
Debt	The association reported E700m of additional debt in its 2025 annual report.				
Cost evidence	None published. RSSC audited accounts are the next place to look.				
What it means for Nigeria	**The benchmark Nigeria should be measured against: African, irrigated, and achieving 5.7 times Nigeria's sugar per hectare.**				
Guatemala	World	10.48	107.6	9.76%	2.62 Mt, 2024/25
Land and water	250,000 ha harvested, and about 70 per cent of production is rain-fed.				
Structure	Nine mills: Pantaleón, Magdalena, La Unión, Madre Tierra, Santa Ana, Palo Gordo, San Diego, El Pilar and La Sonrisa.				
Season	A 29-week harvest. The 2024/25 season started about two weeks late after unseasonal October rain, which cut sucrose.				
Energy	992.4 MW of installed cogeneration. The sugar sector supplied 30 per cent of the country's renewable energy.				
Labour	About 52,000 direct and 258,000 indirect jobs. Outward migration has created labour shortages and CENGICAÑA is pushing toward full mechanisation.				
Cost evidence	None published.				
A caution	The USDA tables are internally inconsistent. Cane yield is printed as 10.76 t/ha, which is implausible, and is read here as 107.6.				
What it means for Nigeria	**The most important counter-example in this brief. Guatemala takes 10.5 tonnes of sugar off a hectare with 70 per cent of its production rain-fed, more than fully irrigated Eswatini. Irrigation is not what decides yield. Agronomy is, and that is a cheaper thing to fix.**				
Brazil	World	9.88	76.0	13.00%	42.5 Mt, 2026/27 f
Land and water	Rain-fed, at very large scale. Centre-South yields 75 to 80 t/ha, with the best mills at 90.				
Structure	Mixed estate and outgrower, fully mechanised. One mill observed at 24,000 TCD with 70 per cent outgrower cane.				
Grower payment	Consecana pays per kilogramme of recoverable sugar, not per tonne of cane.				
Energy	Bagasse fires the boilers, so the factory energy line is near zero. Ethanol and exported power are large enough to change the cost ranking.				
Season	200 to 240 crushing days, April to November.				
Cost evidence	R$166 a tonne of cane, about US$32.23, from the Pecege survey of more than 40 companies. The only public production cost in this set.				
What it means for Nigeria	**The world floor, and the reference everyone else is measured from. Nigeria should not expect to match it.**				
South Africa	Africa	8.20	70.4	11.65%	2.05 Mt, 2025/26 f

COUNTRY	REGION	SUGAR T/HA	YIELD T/HA	RECOVERY	PRODUCTION
Land and water	250,000 ha harvested. Mixed rain-fed and irrigated.				
Structure	The South African Sugar Association is the only body legally permitted to export raw sugar. It sets the notional price and manages the division of proceeds.				
Grower payment	64 per cent to growers, 36 per cent to millers, paid on recoverable value delivered. The clearest published split in Africa.				
Prices	The recoverable value price was R7,665.63 in 2024/25 and an estimated R7,384.68 in 2025/26, down 4 per cent.				
Energy	Electricity rose 12.5 per cent in 2025, reported at up to 30 per cent for some irrigated growers.				
Policy	Health promotion levy of 2.1 cents a gramme of sugar above 4 g per 100 ml. Held flat for 2025/26.				
Cost evidence	None published. The semi-annual reports cost pressure but no figure per tonne.				
What it means for Nigeria	**The 64:36 split is the most useful published reference for what a Nigerian cane pricing formula should look like.**				
Zimbabwe	Africa	8.16	81.0	6.61%	443,501 t, yr to Mar 2026
Land and water	54,350 ha. Irrigated Lowveld estates.				
Yield	81 t/ha industry-wide and 100 t/ha on the estates, which is the gap between an estate and its outgrowers in the same country.				
Structure	Estate-dominated, Tongaat Hulett operations.				
Cost evidence	None published.				
What it means for Nigeria	**Estate yields of 100 t/ha show what southern African agronomy delivers on irrigated land.**				
China	World	7.92	66.0	13.30%	9.9 Mt cane sugar, 2025/26 f
Land and water	1.25m ha of cane. Guangxi carries 60 to 65 per cent of cane sugar, Yunnan about a quarter.				
Structure	147 cane mills: 74 in Guangxi, 52 in Yunnan, 18 in Guangdong, 3 in Hainan. Cane is about 86 per cent of Chinese sugar, beet the rest.				
Grower payment	A government purchase price of RMB 490 to 540 a tonne in Guangxi, about US$67 to 74. The highest cane price in this set by a wide margin.				
Cost evidence	Farm labour alone runs about RMB 170 a tonne of cane, roughly US$23, which is about a third of what the farmer receives.				
Mechanisation	Limited on cane. Terrain, small farm size and labour shortage all restrict it, despite provincial subsidy programmes.				
Recovery	Among the best in the set: Guangxi 13.3 per cent, Yunnan 13.1.				
What it means for Nigeria	**Proof that a high cane price does not buy competitiveness. China has nearly the best recovery in this set and the most expensive cane, so its cane cost per tonne of sugar is close to Kenya's. It survives on a protected domestic market, not on cost.**				
Thailand	World	7.13	65.2	10.93%	11.26 Mt, 2025/26

COUNTRY	REGION	SUGAR T/HA	YIELD T/HA	RECOVERY	PRODUCTION
Land and water	1.58m ha harvested. Mostly rain-fed; most farmland in the upper northeast is not irrigated.				
Structure	Smallholder-dominated, with the northeast and lower north carrying 44 and 24 per cent of planted area.				
Grower payment	Cabinet set the initial 2025/26 cane price at 890 baht a tonne, about US$29, down 23 per cent on the year.				
Cost evidence	The cane board puts cultivation cost at about 1,358 baht a tonne, about US$44. Growers are being paid below cost this season.				
Harvest	97 per cent of the 2025/26 crop was cut green rather than burnt, a record, against a ten-year average of 63 per cent.				
Co-products	About 3 per cent of cane goes to two juice-based ethanol plants.				
What it means for Nigeria	**The most important comparator in this brief. Thailand produces less sugar per hectare than South Africa yet exports more than almost anyone, because a rain-fed hectare costs a fraction of an irrigated one. Output per hectare is not the same as cost competitiveness.**				
Mexico	World	6.87	62.1	10.43%	5.06 Mt, 2024/25
Land and water	736,486 ha harvested, 45.75 Mt of cane crushed.				
Structure	47 mills processed the 2024/25 crop.				
Season	Mills finished between April and July 2025: twelve in April, twenty-eight in May, five in June and two in July.				
Pricing	CONADESUCA sets an annual reference price by negotiation between government, millers and growers. It reached 21,657.45 pesos a tonne of sugar in 2024/25, about US$1,061, the highest on record.				
Support	Government support of 7,300 pesos a producer a year, about US$358, unchanged since 2019/20.				
Cost evidence	None published.				
What it means for Nigeria	**A large, long-established industry running at 6.87 tonnes of sugar a hectare, which is below Thailand. Scale and maturity do not guarantee productivity.**				
India	World	6.03	79.5	9.50%	35.25 Mt, 2025/26 f
Land and water	5.85m ha, the largest cane area in the world. 465 Mt of cane, of which about 370 Mt goes to sugar.				
Grower payment	A statutory Fair and Remunerative Price of INR 355 a quintal for 2025/26, about US$41.70 a tonne of cane, set against a 10.25 per cent recovery baseline. Uttar Pradesh, Uttarakhand, Haryana and Punjab set a State Advised Price above it.				
Arrears	About INR 97,270 crore was owed to cane farmers for 2024/25, roughly US$11.7bn. By late April 2025 some 87 per cent had been paid.				
Ethanol	About 4.5 Mt of sugar equivalent is expected to be diverted to ethanol in 2025/26.				
Recovery	9.5 per cent forecast for 2025/26, below the 10.25 per cent the pricing formula assumes.				
A caution	A material share of Indian cane goes to gur and khandsari rather than mills, so sugar per hectare understates milling performance.				
What it means for Nigeria	**The clearest warning in the set about cane pricing. A statutory price set above what mills can pay produced eleven billion dollars of arrears to farmers. Any Nigerian formula needs to be able to fall as well as rise.**				
Kenya	Africa	4.26	51.0	8.35%	810,000 t, 2024/25

COUNTRY	REGION	SUGAR T/HA	YIELD T/HA	RECOVERY	PRODUCTION
Land and water		190,000 ha. Rain-fed. The field report puts yields at 40 to 60 t/ha against about 100 elsewhere.			
Structure		Smallholders with under one hectare each grow about 93 per cent of the cane. Miller-owned plantations grow about 7 per cent.			
Grower payment		KSh 5,750 a tonne, about US$44.57, since July 2025, set by a committee of government, growers and millers.			
Policy		A 4 per cent Sugar Development Levy from July 2025. Imports from outside COMESA and the EAC face a 100 per cent tariff; COMESA duty-free imports are capped at 350,000 t.			
Supply		Mills in the west have scaled back or shut intermittently for want of mature cane, and the government has mandated closures so fields can recover.			
Cost evidence		None published.			
What it means for Nigeria		**The closest African comparator to Nigeria on productivity, and a warning. Extreme smallholder fragmentation and a regulated cane price above Thailand's full cultivation cost have produced an industry that cannot supply its own market.**			
Nigeria	Africa	1.88	36.9	5.08%	12,449 t, one estate, 2025/26
Land and water		6,622 ha harvested on the one reporting estate. Fully irrigated: twelve pump stations drawing about three megawatts, behind a 35 km dyke on the River Niger.			
Structure		Backward Integration Programme estates, integrated estate and mill. Most sugar sold in Nigeria is not made this way: it is refined from imported raw.			
Grower payment		The anchor mills' formula pays 0.45 times the ex-factory sugar price times a 10 per cent recovery benchmark, about US$38.25 a tonne of cane.			
Factory		Mill extraction of 62.7 per cent against an industry norm of 93 to 96. Boiling house recovery of 77.0 per cent against 85 to 90.			
Energy		Bagasse cogeneration carries about 48 per cent of the irrigation load in the model; the balance falls on compressed natural gas.			
Cost evidence		No observed operator cost exists. The Council's estate model gives US$442.90 a tonne at its own assumptions and US$1,490 at measured performance.			
What it means for Nigeria		**Nigeria carries the cost structure of an irrigated estate and the output of a poor rain-fed one. That is the worst of both and it is the whole finding.**			
Australia	World	-	-	14.30%	4.18 Mt, 2026/27 f

COUNTRY	REGION	SUGAR T/HA	YIELD T/HA	RECOVERY	PRODUCTION
Cost evidence	The only full published cost of production in this brief. A BDO survey of thirteen Queensland mills puts raw sugar at A$427 a tonne, weighted average across 2018 to 2020, on a range of A$371 to A$484 by mill. Net of by-product revenue from cogeneration, molasses and mill mud it falls to A$397.				
The split	Cane growing cost A$35.45 a tonne of cane in 2020; milling A$27.22.				
Cost structure	Cane growing is 58 per cent of the cost of raw sugar. Administration and overheads 12 per cent, maintenance 10, factory 7, transport 6, depreciation 6, levies 1.				
Recovery	About 14.3 per cent, derived from the report's own cane cost and cost share figures. The highest in this set.				
Utilisation	Running the mills at full utilisation would take total cost to about A$384 a tonne, which the report treats as hypothetical.				
A caution	These are 2018 to 2020 figures. They are not in the same money as the 2025 and 2026 numbers elsewhere in this brief.				
What it means for Nigeria	**The document the rest of this brief leans on. It is where the 58 per cent cane share comes from, and it is the only place anyone publishes the full structure of a raw sugar cost mill by mill. Worth reading in full before CS-02 is designed.**				
Mozambique	Africa	-	-	-	about 80,000 t at Maragra
Scope	This is one estate, Maragra Açúcar, not the national figure. Illovo holds 99 per cent.				
Location	Manhíça district, about 80 km north of Maputo.				
Cane supply	Over 460,000 t from its own estates and about 400,000 t from independent growers, many of them smallholders. Roughly 53 per cent estate, 47 per cent outgrower.				
Products	Mainly raw sugar, plus brown sugar and potable alcohol.				
Energy	Cogeneration, with surplus power exported to the national grid when available.				
Employment	About 3,400 permanent and non-permanent staff.				
Cost evidence	None published.				
What it means for Nigeria	**The 53:47 estate to outgrower balance is close to what a Nigerian Backward Integration estate running an outgrower scheme would look like, and worth studying for that reason.**				
Egypt	Africa	-	-	-	about 3.0 Mt, of which roughly 36 per cent cane
Why it is here	Named in the brief and Africa's largest sugar producer.				
Why it is not in the rankings	Roughly 64 per cent of Egyptian sugar comes from beet, not cane, so it fails the cane-only test this brief applies.				
Scale of the cane industry	About 1.0 Mt of cane sugar, which would place it below South Africa among African cane producers.				
Cost evidence	Not assembled. A beet cost base is not comparable to a cane one and would need its own treatment.				
What it means for Nigeria	**Kept for completeness because it was named, but it cannot sit in a cane cost comparison without separating the two crops.**				

Countries still thin

Not yet profiled because the research has not been done, not because sources do not exist.

COUNTRY	REGION	PRODUCTION	SOURCE	WHAT IS MISSING
Pakistan	World	6,910 kt, 2026/27 f	USDA FAS circular	Volume only. Area, yield, recovery and cane pricing not obtained.
Indonesia	World	2,500 kt, 2026/27 f	USDA FAS circular	Volume only.
Colombia	World	2,400 kt, 2026/27 f	USDA FAS circular	Volume only. The 2025/26 season was held back by weak commercial extraction in the Cauca River Valley despite higher cane volumes, after two years of excess rain diluted sucrose.
Uganda	Africa	690 kt, 2025	ISO conference paper	Volume only, and from a commercial source rather than an official one. Production was 633 kt in 2024 and is projected above 770 kt for 2026.
Sudan	Africa	not obtained		No figure the Council would publish.
Zambia	Africa	not obtained		No figure the Council would publish.
Malawi	Africa	not obtained		No figure the Council would publish.
Tanzania	Africa	not obtained		Output described as erratic over five years, with a deficit of about 270 kt.
Ethiopia	Africa	not obtained		Production described as declining, with no figure given.
Mauritius	Africa	not obtained		No figure the Council would publish.

Data notes

- **To confirm:** the 5.08% rendement is derived from 12,449 tonnes of sugar on 244,991 tonnes of cane. Both figures must cover the same cane. If 244,991 is cane harvested while a smaller tonnage was crushed, recovery is understated. The measured mill extraction of 62.7% supports the low figure independently.
- **PE-02 does not reconcile:** it records 1,676 lost hours against 3,240 available and a time efficiency of 59.9%. Those give 48%, not 60%. All three figures point the same way, but it should be resolved.
- **One estate:** every Nigerian figure comes from one estate. Two further operators have rows opened in PE-01 and have returned nothing. One estate is not a national position.
- **Modelled, not collected:** CS-02 is reported from the estate financial model, not an operator survey. Every Nigerian cost figure is what a well-run estate would cost, not what one does cost. The model refines its own raw, which is not what the Nigerian refineries do (they import raw and refine it).
- **Coverage:** only five African producers are confirmed with a volume. The African ranking is partial. No published cost of production exists for most comparators, so the country notes carry cost drivers (yield, recovery, water regime, energy, grower split) instead of a cost per tonne.
- **Sources:** NSDC Sugar Estate Model (generic, water modes, recalculated); PE-01 Agronomic Performance Return and PE-02 Factory Performance Return; CS-01 landed cost, built from 91 customs declarations for H1 2026; USDA FAS Sugar: World Markets and Trade, May 2026; USDA FAS GAIN, Eswatini SZ2025-0001 and South Africa SF2025-0033; Zimbabwe Sugar Association; Pecege/USP Custos de produção, safra 2026/27. Figures match CS-06, CS-06A and CS-02 in the MIU Master Workbook.

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