



**Lab**  
**Global**

# Symington Family Estates

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Disclosure Report

Date Submitted: March 28th, 2024



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## Disclosure Materials

Certified B Corporations must complete a Disclosure Questionnaire to identify potentially sensitive issues related to the company (e.g. historical fines, sanctions, material litigation, or sensitive industry practices).

This component does not affect the company's score on the B Impact Assessment. If the company answers affirmatively to any items in the Disclosure Questionnaire that B Lab deems relevant for public stakeholders, then, as a condition of their certification, the company must:

- 1) Be transparent about details of the disclosure issues identified on the company's public B Impact Report
- 2) Describe how the company has addressed this issue
- 3) Demonstrate that management practices are in place to avoid similar issues from arising in the future, when necessary.

In all cases, the Standards Advisory council reserves the right to refuse certification if the company is ultimately deemed not to uphold the spirit and integrity of the community.

In addition to the voluntary indication of sensitive issues in the Disclosure Questionnaire, companies pursuing Certification also are subject to a background check by B Lab staff. Background checks include a review of public records, news sources, and search engines for company names, brands, executives/founders, and other relevant topics.

Sensitive issues identified through background checks may or may not be within the scope of questions in the Disclosure Questionnaire, but undergo the same review process and are subject to the same possible review by the Standards Advisory Council, including ineligibility for B Corp Certification, required remediation, or disclosure.

**This document contains a copy of the company's completed Disclosure Questionnaire and related disclosure documentation provided by the company**



# Disclosure Questionnaire

## Industries and Products

	Yes	No
Please indicate if the company is involved in production of or trade in any of the following. Select Yes for all options that apply.		
Animal Products or Services	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Biodiversity Impacts</a>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Chemicals	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Disclosure Alcohol</a>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Disclosure Firearms Weapons	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Disclosure Mining	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Disclosure Pornography	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Disclosure Tobacco	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Energy and Emissions Intensive Industries	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Fossil fuels Gambling	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Genetically Modified Organisms	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Illegal Products or Subject to Phase Out	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Industries at Risk of Human Rights Violations	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Monoculture Agriculture	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Nuclear Power or Hazardous Materials	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Payday, Short Term, or High Interest Lending	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Water Intensive Industries</a>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Tax Advisory Services	<input type="checkbox"/>	<input checked="" type="checkbox"/>

## Outcomes & Penalties

	Yes	No
Please indicate if the company has had any formal complaint to a regulatory agency or been assessed any fine or sanction in the past five years for any of the following practices or policies. Check all that apply.		
Anti-Competitive Behavior	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Breaches of Confidential Information	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Bribery, Fraud, or Corruption	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Company has filed for bankruptcy	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Consumer Protection	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Financial Reporting, Taxes, Investments, or Loans	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Hazardous Discharges Into Air/Land/Water (Past 5 Yrs)	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Labor Issues	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Large Scale Land Conversion, Acquisition, or Relocation	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Litigation or Arbitration	<input type="checkbox"/>	<input checked="" type="checkbox"/>
On-Site Fatality	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Penalties Assessed For Environmental Issues	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Political Contributions or International Affairs	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Recalls	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Significant Layoffs	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Violation of Indigenous Peoples Rights	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Other	<input type="checkbox"/>	<input checked="" type="checkbox"/>



## Practices

	Yes	No
Please indicate if the following statements are true regarding whether or not the company engages in the following practices. Check all that apply. If the statement is true, select "Yes." If false, select "No."		
Animal Testing	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Company/Suppliers Employ Under Age 15 (Or Other ILO Minimum Age)	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Company prohibits freedom of association/collective bargaining	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Company workers are prisoners	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Conduct Business in Conflict Zones	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Confirmation of Right to Work	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Does not transparently report corporate financials to government	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Employs Individuals on Zero-Hour Contracts	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Facilities located in sensitive ecosystems</a>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ID Cards Withheld or Penalties for Resignation	<input type="checkbox"/>	<input checked="" type="checkbox"/>
No formal Registration Under Domestic Regulations	<input type="checkbox"/>	<input checked="" type="checkbox"/>
No signed employment contracts for all workers	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Overtime For Hourly Workers Is Compulsory	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Payslips not provided to show wage calculation and deductions	<input type="checkbox"/>	<input checked="" type="checkbox"/>

	Yes	No
Sale of Data	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Tax Reduction Through Corporate Shells	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Workers cannot leave site during non-working hours	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Workers not Provided Clean Drinking Water or Toilets	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Workers paid below minimum wage	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Workers Under Bond	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Other	<input type="checkbox"/>	<input checked="" type="checkbox"/>

## Supply Chain Disclosures

	Yes	No
Please indicate if any of the following statements are true regarding your company's significant suppliers.		
Business in Conflict Zones	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Child or Forced Labor	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Negative Environmental Impact	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Negative Social Impact	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Other	<input type="checkbox"/>	<input checked="" type="checkbox"/>



# Disclosure Questionnaire Statement

## Disclosure Questionnaire Category: Environmentally Intensive Industries - Biodiversity Impact and Monoculture Agriculture

<b>Topic</b>	Biodiversity Impact and Monoculture Agriculture
<b>Summary of Issue</b>	As a vineyard and winery, Symington Family Estates operates in an industry in which biodiversity impact and monoculture agriculture are material environmental issues.
<b>Size/Scope of Issue (e.g. \$ financial implication, # of individuals affected)</b>	<p>In the previous fiscal year, 93% of the Symington Family Estates's revenue was earned from the sale of wine.</p> <p>The company controls a total of 2543 hectares of land. 47% of the land is cultivated as vineyards, 21% is cultivated with other crops such as olive trees and orchards in a system of extensive agriculture, and 32% is natural land consisting of natural areas of Mediterranean forest, uncultivated, native shrubland and riparian vegetation. On average, 3% of vineyards are re-planted each year to ensure their long-term sustainability.</p> <p>Our estates are mosaics of various coexisting ecosystems which we intend to protect and enrich through responsible intervention and the application of measures to enhance their ecological value. In the Alentejo, Quinta da Fonte Souto lies within the Serra de São Mamede Natural Park, part of the National Network of Protected Areas, where the company manages a forestry project on 100 hectares (covering approximately 48% of the property) replanting with indigenous tree species that are more resistant to forest fires and act as a haven for biodiversity.</p>
<b>Impact on Stakeholders</b>	Agriculture, particularly in cases where a single crop is cultivated at a time, poses a risk to local ecosystems of flora and fauna as well as the potential degradation of cultivated land.
<b>Implemented Management Practices</b>	The Douro Region is classified as a REN (National Ecological Reserve), a legal framework that is built to protect and conserve special areas due to their high ecological value and sensitivity. Crop rotation does not apply to the vineyard culture system. All our vineyards have integrated production certification, which

	<p>means that high-quality food production is performed using rational management of natural resources favoring organic mechanisms over conventional tools, thereby contributing to sustainable agriculture. We have also been increasing the extension of our organic production and will soon reach 205 hectares. Soil health is essential for normal vine function, for balanced grape maturation and, therefore, for producing exceptional wines. Our approach is to intervene minimally and indirectly, so that our efforts do not conflict with ecosystem responses, which, by nature, tend to create balance and resilience. We prefer to reinforce nature through natural-based solutions, such as encouraging cover crops, using organic compost, and enhancing the conditions for indigenous fauna and flora to flourish.</p> <p>Vineyard cover crops, whether wild or sown, are crucial for conserving soil health, as they improve soil structure, help resist erode and retain moisture, while also promoting a symbiosis between cover crops' root systems and the surrounding ecological communities and, thereby, enhancing their biodiversity. We are currently carrying out field studies of seven distinct combinations of plant species to deepen our insight into the impacts of each on the soil microbiome and the benefits for the vine. The goal is to increase our knowledge base about the advantages of each species for the vineyard ecosystem, in order to guide the search for mechanisms to adapt to climate alterations. In addition to this, we also work alongside other private organizations to understand the baseline status of this ecosystem and study how the company can work on improving it, with a major focus on biodiversity and land management.</p>
<b>Management Comments</b>	<p>National Sustainable Winegrowing Certification</p> <p>In June 2023, we were proud to learn that we were the first wine producer to receive the National Sustainable Winegrowing Certification. Our Level A award is the highest possible classification. This framework was recently created by the Instituto da Vinha e do Vinho and ViniPortugal specifically for the Portuguese wine sector. It aims to be a visible and independent guarantor of Portuguese wines in international markets, underlining their credibility and reliability, as well as demonstrating producers' commitment to sustainable production.</p>



# Disclosure Questionnaire Statement

## Disclosure Questionnaire Category: Environmentally Intensive Industries - Water Intensive Industries

<b>Topic</b>	Water Intensive Industries
<b>Summary of Issue</b>	<p>As a vineyard and winery, Symington Family Estates operates in an industry that is water-intensive. Aspects of the industry that make it water intensive include irrigation used in the cultivation of vines that represents 88% of total water consumption, and 12% is used in winemaking, aging, bottling and wine tourism. Vineyards are, by definition, a forgiving crop regarding water scarcity. In our current context of increasingly severe extreme heat waves, the vines are adopting novel root and vegetation wall strategies. Nevertheless, to maintain a balanced vegetative cycle, especially at ripening, the plants should optimally be guaranteed adequate water supplies to achieve each vineyard's qualitative objectives. .</p>
<b>Size/Scope of Issue (e.g. \$ financial implication, # of individuals affected)</b>	<p>In the previous fiscal year, 93% of the Symington Family Estates's revenue was earned from the sale of wine.</p> <p>52% of our vineyards are irrigated. We use both surface and groundwater for irrigation. Meanwhile, water for industrial activities such as winemaking, bottling and human consumption is sourced from surface water, groundwater and third party water grid. In 2022, our industrial water usage ratio stood at 2.5 liters per liter of bottled product.</p>
<b>Impact on Stakeholders</b>	<p>As water intensive industries, agriculture and wine production poses risks such as water stress or depletion of local water sources if water use is not appropriately managed.</p>
<b>Implemented Management Practices</b>	<p>INDUSTRIAL WATER</p> <p>To address this challenge, we have implemented an integrated and comprehensive water management strategy that includes monitoring the amount of water used in each key activity in the production process. To this end, monthly water consumption is digitally recorded in our Infraspark® maintenance software and automatically integrated into our Kisense® monitoring and management system. Kisense® provides real-time visualization</p>

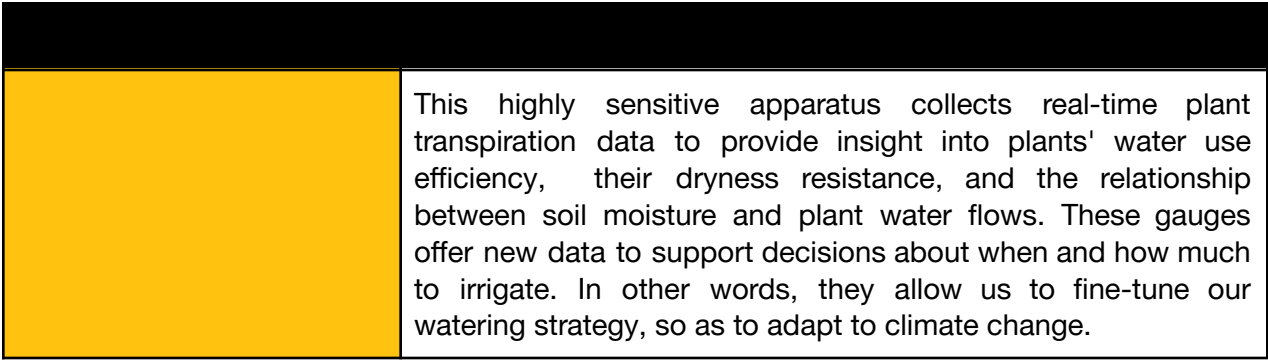
and predictive analysis for optimisation and control, individually and collectively, across all our sites. This enables us to understand current water usage, identify inefficiencies such as leaks and address them quickly and effectively, and importantly, provides insight for system redesign and continuous process improvement.

One of the most important water management measures is team awareness of best practice in water use. To this end, we provide regular refresher training to our production teams. This includes a detailed assessment of the key processes that use the most water, including the do's and don'ts of their daily tasks in the wineries and warehouses. We also hold workplace meetings to hear from colleagues about solutions to improve processes. We have made changes to washing equipment to make it more efficient and have increased pressure washing equipment and dry-cleaning tools. Wherever possible, rinse water is used for the next wash. On the bottling lines, the closed-loop clean-in-place (CIP) system we have introduced allows us to reuse half of the total water used in the bottle rinsing machine. We are currently working to optimize our winemaking processes in several aspects, including the evaluation of new stabilization and filtration technologies, capacity management, among other areas. These initiatives will improve efficiency and prioritize sustainability by strategically reducing wine transfers, resulting in substantial water savings. Overall, our goal is to reduce our water consumption by 10% by 2025 while supporting wine production practices. We have set a second line of key performance indicators in place and encourage our teams to champion the best results in their areas.

#### AGRICULTURAL WATER

We monitor the vines' water stress, irrigating as little as possible depending on the weather parameters recorded at our weather stations. Additionally, vines' water potential data is measured using a pressure chamber, while soil water availability is assessed using fixed and mobile probes that gauge the moisture content at different depths; all these data are then reconciled with the physical characteristics of the soils. We have recently taken another step towards vine water regulation data by installing meters called Sap-flows directly on plants.





# Disclosure Questionnaire Statement

## Disclosure Questionnaire Category: Facilities In Sensitive Ecosystems

<b>Topic</b>	The company operates in Portugal 's Douro Valley and Serra de São Mamede Natural Park.
<b>Summary of Issue</b>	Symington Family Estates has vineyards in the Alto Douro Wine Region, which is designated as a UNESCO World Heritage Site. The Alto Douro Wine Region is famous for its traditional viticulture practices maintained by local landowners. Additionally, the Alentejo property of the Symington Family Estates is located within the Serra de São Mamede Nature Park, which is a protected area in Portugal.
<b>Size/Scope of Issue (e.g. \$ financial implication, # of individuals affected)</b>	Most of our properties are found located in areas classified for historic preservation. In the Douro Valley, approximately 70% of our vineyards lie within the perimeter of the UNESCO World Heritage Site. Our wine cellars, offices and bottling centres are located in the historic quarter of Vila Nova de Gaia. In the Alentejo, Quinta da Fonte Souto lies within the Serra de São Mamede Natural Park, part of the National Network of Protected Areas.
<b>Impact on Stakeholders</b>	The challenge of preserving the landscape of the Alto Douro Wine Region and Alentejo vineyards includes the erosion of natural habitats, impact on biodiversity due to the use of pesticides and herbicides, and pollution of natural water sources
<b>Implemented Management Practices</b>	<p>One of our medium-term goals is to implement a biodiversity and ecosystem services management plan for each of our estates. To this end, we are engaged in an inventory of wild flora and fauna together with an assessment of habitat quality and the current state of landscape preservation. Our first appraisal of the flora and fauna both in wild and cultivated lands is currently taking place on the north bank of the Douro River on 470 hectares comprised by Quinta do Vesúvio and Quinta do Vale de Malhadas. Specialized biologists are searching for mammal, bird, insect and plant species that serve as indicators of the ecological quality and conservation status of the living habitats.</p> <p>Our intention is to build a knowledge base incorporating key ecosystem indicators, current practices, initiatives carried out,</p>

	<p>as well as new regulatory requirements. This will enable us to draw up evolutionary biodiversity profiles for each estate that are systematized and intercomparable. It will include important data both for strategic decision-making and sustainability reporting.</p> <p>The company has formed an alliance with the University of Porto's Research Centre for Biodiversity and Genetic Resources (CIBIO), which allows researchers access to their properties. Additionally, they have been supporting the Vila Real (UTAD) University's Wildlife Rescue Centre (Centro de Recuperação de Animais Selvagens, CRAS) since 2011. As a result, birds of prey have been released on the company's property.</p> <p>At our Alentejo property, the company is implementing a reforestation program on 100 hectares of forestry land managed within the Serra de São Mamede natural park. We are replanting the logged areas with a variety of indigenous Portuguese tree species and will manage the forest as a nature reserve to protect local biodiversity and act as a natural form of carbon capture.</p> <p>The company has also developed inclines for new terraces to prevent water run-off and soil loss. We have preserved 93 kilometers of old stone terraces on our properties, which serve as havens for the region's flora and fauna.</p>
<b>Report</b>	<p>Information about the UNESCO declaration of the Alto Douro Wine Region can be found <a href="https://whc.unesco.org/en/list/1046">https://whc.unesco.org/en/list/1046</a>, and information about Serra de São Mamede Natural Park can be found <a href="https://icnf.pt/conservacao/mapareasprotegidas/parquesnaturais/pnserradesmamede">https://icnf.pt/conservacao/mapareasprotegidas/parquesnaturais/pnserradesmamede</a></p>

# Disclosure Questionnaire Statement

## Disclosure Questionnaire Category: Alcohol

<b>Topic</b>	Company produces alcohol products
<b>Summary of Issue</b>	Symington Family Estates is a winery that earns a material amount of revenue from the sale of alcohol
<b>Size/Scope of Issue (e.g. \$ financial implication, # of individuals affected)</b>	In the previous fiscal year, 93% of the Symington Family Estates's revenue was earned from the sale of wine.
<b>Impact on Stakeholders</b>	Alcohol may have a negative impact on the health and well-being of individuals and their communities.
<b>Implemented Management Practices</b>	<p>The company complies with all regulations and laws related to the sale of alcohol in the jurisdictions in which it operates.</p> <p>All employees serving alcohol receive training on over-serving and serving minors. All employees serving alcohol are supervised by a manager who is trained in this area and who has responsibility for ensuring the policy is adhered to. The legislation is displayed in all facilities where the company serves alcohol and includes not serving or selling alcoholic drinks to people who are under the age of 18 or who appear to be under the influence of excess alcohol. All companies that the company sells to are licensed to serve or sell alcohol and follow the relevant legislation in their country. Our labels are currently being reformulated to comply with new labeling legislation, which requires additional useful consumer information such as ingredients, nutritional information and environmental data on the composition and final destination of packaging. Smart communication tools, such as the QR code, make it possible to update label information without wasting material.</p> <p>The company includes the Enjoy Responsibly message on back labels.</p> <p>Additionally, the company is a member of the Wine in Moderation Initiative <a href="http://www.wineinmoderation.eu">www.wineinmoderation.eu</a>.</p>

<b>Management Comments</b>	We recognize our key role in promoting responsible and moderate wine consumption. We therefore support initiatives aimed at reducing the risks to consumer health and safety posed by excessive consumption. We are committed to advocating the consumption of wine as part of a Mediterranean diet and lifestyle - recognized by UNESCO as part of the Intangible Cultural Heritage of Humanity - characterized by moderate consumption of wine during meals.