



2025 Partnership Meeting

Our Future: Resilience
Through Sustainability
Partnership Meeting Summary

19-20 March, 2025
São Paulo, Brazil
(Tivoli Mofarrej Hotel)

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Introduction

Under the theme “Our Future: Resilience Through Sustainability”, the World Cocoa Foundation's (WCF) two-day summit in São Paulo, Brazil, convened close to 500 representatives from governments, cocoa-growing communities, companies, civil society and academia.

Speakers argued that global challenges such as climate change and disease have shifted the need for a sustainable cocoa sector from a moral imperative to a matter of survival. As the sector faces unprecedented pressure to deliver at speed and scale, compounded by an evolving regulatory landscape and geopolitical shifts, this moment demands coordinated, practical approaches towards efficient execution.



A Message from the World Cocoa Foundation President, Chris Vincent

We have entered a new era for sustainability – one that demands innovation, collaboration and collective action.

Recent political and economic instability – regulatory delays, funding cuts and soaring cocoa prices – adds further strain to a sector already facing deep challenges. Resilience, the focus of this year's Partnership Meeting, is not just a priority but a strategic necessity. A sustainable cocoa supply chain must ensure farmers earn a living income, whilst adapting to regulations and maintaining long-term supply amid increasing scrutiny and shifting market dynamics.

As a leading sector voice, WCF convenes key actors, fostering collaboration for resilience. With regulations advancing, our role is to equip members with the tools to ensure compliance, including CSDDD readiness.

The Partnership Meeting underscored the sector's interconnectedness, reinforcing WCF's commitment to strengthening collaboration across the supply chain to drive pragmatic yet sustainable solutions. By embracing a pre-competitive approach, we can build a supply chain that is not just compliant but truly resilient – one that withstands pressures, seizes opportunities and delivers long-term sustainability for all.

WCF's upcoming activity includes increasing its convening role in two areas. Firstly, we will seek to connect all of the many players working on cocoa diseases, their management and control – across continents – to help them identify and share best practice for the farmer and to identify new areas that will benefit from collective action. Secondly, we will seek to build on our development in 2024 of the Cocoa Household Income Study, the Deforestation Risk Assessment tool and Greenhouse Gas Accounting Methodology, to work with other commodity associations, academia, governments and our members to develop standards that will help to shape how legislation should be framed and implemented.



Chris Vincent

President, World Cocoa Foundation



Market Insights

Plenary discussions examined whether historically high cocoa prices could catalyse transformation or deepen existing structural challenges. There was consensus that resilience must be tied directly to productivity, profitability and farmer wellbeing, rather than short-term market gains.

Panellists called pre-competitive collaboration (including with governments and farmers) the "powerful key" to enhance the efficiency and productivity of the entire cocoa value chain. They argued that the challenges it faces are too great for any single individual or organisation; tackling these issues in siloes leads to fragmented investments, duplication and confusion.

Santiago Gowland, Chief Executive Officer, Rainforest Alliance: *"There are a lot of resources to be managed more efficiently at a pre-competitive level, so that companies can focus on competing where it makes sense to compete and collaborate where it makes sense to collaborate."*

Speakers argued that sustainability must adapt according to the needs of people, the economy and the environment. Alex Assanvo, Executive Secretary, Côte d'Ivoire – Ghana Cocoa Initiative (CIGHCI), called for sustainability to be built into everything the sector does.

Pam Thornton, Commodity Trader, Nightingale Investment Management Ltd., advocated for "practical sustainability", by developing a comprehensive cocoa research base.



We have a unique opportunity to rewrite the history of cocoa and the chocolate industry. Times of crisis are the times to produce big changes. The path that brought us here may not be the same one that will lead us into the future. This involves embracing new experiences, experimenting with different practices, technologies and changing the way we interact with small and medium-sized producers and their communities."

- Marcello Brito, Executive Secretary,
Legal Amazon Consortium of States



The Global Cocoa Price has risen by over 300% in the last two years.

Source: Federal Reserve Economic Data, International Monetary Fund



Policy Turbulence & Regulatory Shifts

The Partnership Meeting focused on the growing regulatory demands that are reshaping how cocoa is sourced, traced and traded. Discussions covered the EU Deforestation Regulation (EUDR), the Corporate Sustainability Reporting Directive (CSRD) and the Corporate Sustainability Due Diligence Directive (CSDDD).

Wieneke Vullings, Consul General of the Netherlands in São Paulo, Ministry of Foreign Affairs, The Netherlands, described the incoming EU legislation as *"a milestone in terms of business and human rights"* and an effective tool to reach and stimulate a larger group of companies – alongside the market – to work on transparency and due diligence. This includes stopping deforestation and securing a decent living income.

Other speakers noted that a benefit of regulation is the integration of indirect suppliers into the regular supply chain. Speakers on the world cocoa social policies plenary agreed that although legislation is crucial for scaling action on an issue, effective implementation is what truly matters. Although regulations can support child labour prevention and ethical sourcing through technology, a key priority will be to ensure that national and private sector

systems are aligned. Even with legislation, public-private partnerships and multi-stakeholder initiatives will continue to be important. Some speakers voiced concerns about the administrative burden of the legislation, arguing it could lead to excessive auditing and deviate from the original goals of preserving forests and improving farmer livelihoods.

Panellists agreed that greater alignment on traceability, clearer guidance for companies and shared tools would reduce the compliance burden on farmers and smallholders. Many speakers argued that although national traceability systems are essential for creating transparency and accountability, they should not come at the expense of farmers. Michael Amoah, Deputy Director of Research and Development at the Ghana Cocoa Board (COCOBOD), remarked: *"The real change agents are the farmers and not the systems."*

Panellists called for efforts to be undertaken to empower farmers to understand the national traceability systems and engage in constructive collaboration.



From December 30, 2025 cocoa imports must meet three key criteria:

- ✓ Deforestation-free: No production on deforested land after December 2020
- ✓ Compliant with local laws in the country of production
- ✓ Include due diligence statements covering traceability and risk assessment

Chocolate Consumption in a Disruptive Market

Despite two in three people finding chocolate to be expensive today, 90% of households in the Global North and 70% in the Global South are buying chocolate – according to Marcella Botana, Director of Kantar Brazil. Considering the rapid growth of discount stores in Latin America, Marcella highlighted the importance of industry understanding where consumers buy their products. She emphasised that industry must add value: increasingly health and sustainability-conscious consumers are also juggling their choices with price in mind.

Paul Davis, Head of Cocoa, SUCDEN & President, European Cocoa Association: *"Changing consumer preferences are clear. If you want to eat chocolate, you want to know it didn't do damage. The next generation of chocolate consumers wants more than just a product - they demand transparency, ethical sourcing and sustainability in every bite."*

Jaime Recena, Executive President of the Brazilian Association of Chocolate, Confectionery, and Peanut Industries (ABICAB), noted that the Brazilian chocolate industry is poised for significant growth, with a planned \$2 billion investment in the next two years.

Brazil currently accounts for 45% of the South American chocolate/confectionary industry. Although this is partly due to Brazil's size, Jaime argued that it also stems from innovation – evidenced by 25% more Easter chocolate products available this year compared to last year.

Other speakers commented on the potential of Asia-Pacific countries as an emerging market and acknowledged that the sector must be ready for a market that accounts for five billion people, has a strong middle class and a young population.



“ Our sector always has something new for customers and can keep up with market trends.

- Jaime Recena



Transforming Cocoa Supply Chains

“ If we get lost, or humans get separated from nature, nature will impact us.
- Cayetano H. Hernandez

Creating a more resilient, adaptive cocoa supply chain requires collaboration and innovation across the sector – spanning agroforestry to supporting farmer health. Speakers noted that solutions are context-dependent and require knowledge sharing, community involvement and innovative financial solutions.

Agroforestry was presented as critical for conserving and restoring biodiversity in cocoa plantations. With high temperatures in West African cocoa plantations a major factor behind the drastic decline in production in recent years, agroforestry can provide shade that reduces the exposure of cocoa trees to extreme temperatures. Juliette Cody, Global Lead for Climate & Nature at Barry Callebaut, remarked that agroforestry *“is not a tree planting activity. It's a shade management practice that needs to be enforced differently based on the landscapes and the people that we source from.”*

Challenges around large-scale deployment of agroforestry systems, such as lower yields and higher implementation costs, can be overcome by stronger collaboration with local communities and producers and mobilising innovative financial mechanisms such as Payments for Ecosystem Services (PES), carbon credits and biodiversity credits.

Disease is currently one of the main challenges threatening world's cocoa supply. Despite this, breakout sessions explored why effective disease management strategies can even increase productivity and lead to higher yields. Panellists advocated for a comprehensive, shared research base around diseases and increased investment in disease prevention strategies like farmer training, improved planting materials and digital technologies.



Breakout sessions explored ongoing initiatives to support the health, safety and wellbeing of cocoa producers and their communities. Speakers argued that cocoa sustainability should be addressed holistically, focusing on the needs of producers who play a central role in the supply chain. Community leaders and influential individuals who are culturally close to producers can inspire change within communities.

Panellists on the world cocoa social policies plenary reflected that although public-private partnerships, monitoring and remediation systems and a growing bottom-up approach have driven improvements over the past two decades, significant challenges remain in addressing child labour in the cocoa supply chain. Anita Budu, Director West Africa of the International Justice Mission, explained that given child labour covers a broad spectrum, an effective approach must start with differentiation and categorisation.

The importance of high-quality, standardised data that drives inclusive sustainability efforts was a key theme of the conference. Speakers argued that data should be shared equally and farmers must be a strong pillar in this process, to ensure that they can make informed decisions. WCF's Cocoa Household Income Study Methodology was given as an example to harmonise the measurement of cocoa household incomes.

Speakers highlighted the central role of collaboration, trust and community-focused approaches, with Fuzz Kitto, National Co-Director of Be Slavery Free/Chocolate Scorecard quoting the African adage *"if you want to go fast, go by yourself. If you want to go far, go together"*.

“ It's not just setting the guidelines, not just setting the framework, but all of us working together for the implementation, protection and wellbeing of those who may be vulnerable to child labour across the spectrum. - Anita Budu







Modern Farming Innovations

Hosting the Partnership Meeting in Brazil strengthened Global South-South collaboration and learning. Delegates explored how Brazil's leadership in agricultural innovation – from crop diversification and regenerative farming to small-scale mechanisation – is supporting the country's ambitions to double its cocoa production by 2030 through Inova Cacau. Pedro Alves Correa Neto, Secretary of Innovation, Sustainable Development and Cooperativism of the Ministry of Agriculture (MAPA), explained why the commitment promotes sustainable development in the cocoa producing regions of Brazil.

Technical panels presented cases of mechanised cocoa farming from Nicaragua, Cameroon, Guatemala and Brazil. They demonstrated why mechanisation lowers production costs, increases efficiency and fosters productivity in cocoa and other crops. Speakers highlighted practical, scalable approaches to cocoa agroforestry and mechanisation that could support producer countries facing similar productivity pressures. Learnings were shared from coffee, a commodity that has had consistent productivity growth in Brazil over the past 30 years, despite price fluctuations. This growth is partly due to mechanisation: from 1980 to 2020, mechanisation in Brazilian coffee farms increased from 20% to 85%, on average. With 72% of coffee farms in Brazil being under 20 hectares (and the average farm being seven hectares), there are useful learnings for smallholder cocoa farmers.

Panels explored the importance of attracting new generations of farmers to cocoa production, who are often leaving the profession. Technologies and equipment to lessen the manual burden and improve efficiency include cocoa pod breakers, four wheelers for spraying pesticides, drones and mechanical dryers. Pedro Ronca, Director, CocoaAction Brasil / P&A highlighted the importance of an enabling environment: *"Results within the farm gate depend on the enabling environment beyond farm gate"*.

A photograph of Pedro Alves Correa Neto, Secretary of Innovation, Sustainable Development and Cooperativism of the Ministry of Agriculture (MAPA), speaking at a podium. He is wearing a dark suit, white shirt, and green tie. The background features the World Cocoa Foundation logo and the text "2025 Partnership".

“ Inova Cacau is a commitment shared by different stakeholders...not only as competitors but also as collaborators to transfer technologies [and] offer the knowledge we have to share.
- Pedro Neto

Compliance & Assurance

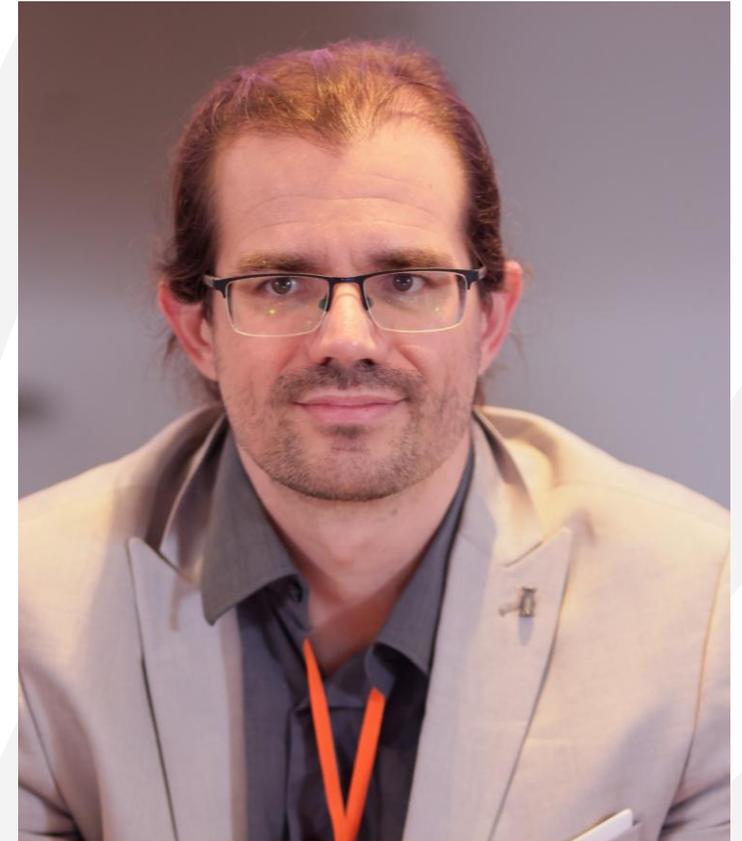
To meet incoming regulations, new methods, tools and guidance will support sector-wide compliance and comprehensive reporting on the most critical cocoa sustainability issues.

Carbon claims require detailed measurement, reporting and verification. Technical sessions explored how the cocoa industry can best measure, report and mitigate greenhouse gas (GHG) emissions, with a focus on eliminating deforestation and increasing reforestation and removals. This included discussion around the first ever GHG accounting standard for cocoa, which WCF produced in collaboration with Quantis and with support from key WCF member companies.

Speakers showcased innovative methods for improving forest and carbon monitoring, acknowledging its challenges due to the complexity of the field. Industry-wide collaboration is needed to enhance public data: while essential, its accuracy remains insufficient for compliance-related analyses. Louis Reymondin, Data Driven Sustainability Research Program Leader at the Alliance of Biodiversity International and CIAT, shared research developed in collaboration with WCF on using public data to monitor deforestation, tree planting and GHG emissions in cocoa.

To make informed decisions, he recommended that those who choose to rely on public data create a composite map using the most accurate datasets available, noting that public global data sets offer consistency but lack precision and inclusiveness, while national and commercial data sets are more accurate. He called for platforms to be more inclusive: smallholder farmers should be able to view results and have feedback mechanisms. Panellists also cautioned against 'carbon tunnel-vision thinking': a holistic approach that includes biodiversity, water management and livelihoods is necessary to effectively address sustainability.

Farmer engagement, traceability and data accuracy are essential for credible carbon accounting. To encourage adoption of carbon-positive farming, speakers suggested incentivising farmers through fair carbon pricing, improved credit access for sustainable practices and compensation for supplying primary data to support claims.



“ Don't make a decision based on one single data set. Try to combine the evidence from many data sets.

- Louis Reymondin



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