Forum Nachhaltiger Kakao
German Initiative on Sustainable Cocoa

MONITORING REPORT 2025





FOREWORD

Each year, our monitoring process gives us an opportunity to reflect on the progress we are making together towards a more sustainable cocoa sector, while also highlighting the challenges that remain. This would not be possible without the continued engagement and commitment of our members. I would therefore like to thank all GISCO members who have continued to contribute data to the annual monitoring process. This report depends on members' time and commitment. I would also like to extend my special thanks to the members of the Task Force Monitoring for once again sharing their valuable feedback and insights.

Living income remains a central focus of this year's report, alongside agroforestry. By keeping living income high on the agenda, GISCO provides an important platform for members to track progress, share insights and strengthen collective efforts to improve cocoa farmers' livelihoods. This year's monitoring also broadens its scope by collecting for the first time data on procurement practices. This provides important information that will guide our work towards the implementation of sustainable procurement practices.

The living-income results show encouraging signs of progress: The share of households above the living income benchmark increased in 2025, and more households were covered by living-income strategies. Women's empowerment was prominent among members' living-income approaches. The number of people reached through these activities rose by almost 20%, from 329,733 in 2024 to 392,633 in 2025. At the same time, some results, particularly those relating to premium payments or Living Income Gap measurement, remain difficult to compare due to differences in data coverage and measurement methods.

In our second focus topic this year, agroforestry, is also evident: The area under agroforestry as well as the tree survival rate has increased: The reported two-year survival rate for trees was 62% in 2025, up from 50% in 2021, although below the 74% reported in 2023. This underlines the importance of maintaining and monitoring established systems alongside expanding their area. Furthermore, agroforestry growth was highly uneven between members, and only a small share of reported cocoa volumes was knowingly traced to agroforestry systems. Expanding agroforestry adoption and traceability, and better understanding its impacts over time, remain important topics for the years ahead.

Taken together, the findings reveal an uneven picture. Members differ in the approaches they take, the scale at which they implement activities and the progress they report. Nevertheless, the findings provide a valuable basis for recognising progress, identifying gaps and determining where further collective attention is needed.

There are clear reasons to continue and strengthen this work. Living income is fundamental to the social and economic sustainability of cocoa production. Agroforestry can help build more resilient production systems, support biodiversity and strengthen farmers' ability to respond to climate-related pressures. Against a backdrop of fluctuating prices and changing climate conditions, it is increasingly important to understand whether these approaches are reaching farmers and delivering lasting benefits.

Looking ahead, credible, consistent and decision-relevant evidence on sustainability performance will become increasingly important, not least in the context of evolving European sustainability regulations and regulatory developments in cocoa-producing countries. In this changing landscape, GISCO has an important role to play in supporting its members by fostering more consistent approaches to data collection, facilitating knowledge-sharing and learning across the sector, and helping translate monitoring findings into concrete action. Ultimately, the aim is not simply to collect more data, but to make better use of the information available to inform decisions and drive meaningful progress towards living incomes and agroforestry.

Aldo Cristiano
Chairman of the Board, GISCO



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EXECUTIVE SUMMARY

Monitoring Report 2025: Spotlight on Living Income, Agroforestry

The German Initiative on Sustainable Cocoa (GISCO) is working towards a sustainable cocoa sector reflected in its **10 goals**, flanked by a comprehensive **definition of sustainable cocoa**.[1] To measure the progress towards achieving these goals, a set of indicators linked to the specific objectives have been developed and are monitored annually.

Purpose and methodology

The purpose of this report is to establish transparency on the progress of GISCO toward its collective goals. Therefore, data is only presented in an aggregate form. It is not possible to draw any conclusions on the sustainability performance of individual GISCO members from the report. Also, please note that data herein is provided by the members themselves and not externally verified.

This year, additional indicators were introduced to measure progress on sustainable procurement practices. Furthermore, several smaller changes were made to some of the questions and definitions to increase clarity and improve data quality. Like last year, all required members submitted questionnaires. Data quality before cleaning remained mixed, which indicates a need to further refine the monitoring system.

This year's report focusses on two priority topics, living income and agroforestry.

Living income: Encouraging signs, but progress remains fragile

Reported data indicates that the share of farmers above the living income benchmark increased substantially compared to 2024. While this signals progress, it will be important to observe whether this improvement can be sustained in light of declined cocoa prices in 2026. Moreover, the comparability of the reported data remained limited.

The number of cocoa-farming households covered by a Living Income strategy continued to increase between 2024 and 2025. The percentage share of households covered remained broadly stable in members' direct supply chains. Members continued to employ a mix of income-related activities. Support for improved farming practices remained the most commonly reported strategy, followed by approaches such as women's economic empowerment (WEE) and improved access to finance.

Financial measures continued to rely mainly on volume-based premiums. While the payment of living income reference prices (LIRP) increased compared to last year, they still represent a small share of volumes sourced. Initial data on procurement practices also suggest further scope to strengthen long-term relationships. As this was the first year that questions related to procurement practices were included in the monitoring questionnaire, differences in how members interpreted and reported the information were expected.

Agroforestry: Expansion, with uneven progress

Members reported a substantial expansion of agroforestry in their projects and supply chains. Reported data indicated an expansion by about thirty percent. However, progress between members remained highly uneven: The expansion was largely driven by a comparatively small number of members, while some other programmes stagnated or even declined. Members reported about 480,000 hectares of newly established agroforestry systems. Basic systems accounted for about half of this area, while advanced and

1 The GISCO goals as well as the sustainability definition are expected to be reviewed, among others to ensure compliance with the EU regulation on Empowering Consumers for the Green Transition (EmpCo).

dynamic systems made up smaller shares. The reported two-year tree survival rate was 62% in 2025, broadly comparable to last year's data. As in previous years, only a few members reported on the survival rate.

The share of cocoa volumes that members could identify as sourced from agroforestry systems remained low, based on the limited reporting available. This likely understates the actual share, as traceability of volumes sourced from agroforestry remains challenging.

Priorities for further progress

The findings point to the need to scale effective living-income and agroforestry programmes while continuing to align on measurement methodologies. Continued exchange and joint action will be important to translate reported progress into sustained improvements.





ZUSAMMENFASSUNG

Monitoringbericht 2025: Fokus auf Existenzsichernde Einkommen, Agroforstwirtschaft Das Forum Nachhaltiger Kakao (German Initiative on Sustainable Cocoa, GISCO) setzt sich für einen nachhaltigen Kakaosektor ein. Dieser Anspruch spiegelt sich in seinen **zehn Zielen** wider, die durch eine umfassende **Definition von nachhaltigem Kakao** ergänzt werden. Um die Fortschritte bei der Erreichung dieser Ziele zu messen, wurden Indikatoren zu den spezifischen Zielen entwickelt, die durch ein jährliches Monitoring geprüft werden.

Zweck und Methodik
Ziel dieses Berichts ist es, Transparenz über die kollektiven Fortschritte des Forums bei seiner Zielerreichung[1] zu schaffen. Daher werden die Daten seiner Mitglieder ausschließlich in aggregierter Form dargestellt. Aus dem Bericht lassen sich keine Rückschlüsse auf die Nachhaltigkeitsleistungen einzelner GISCO-Mitglieder ziehen. Die Daten werden von den Mitgliedern selbst bereitgestellt und nicht extern überprüft.

In diesem Jahr wurden zusätzliche Indikatoren eingeführt, um Fortschritte im Bereich nachhaltiger Beschaffungspraktiken zu messen. Darüber hinaus wurden einige Fragen und Definitionen leicht angepasst, um ihre Verständlichkeit zu erhöhen und die Datenqualität zu verbessern. Wie bereits im Vorjahr reichten alle zur Berichterstattung verpflichteten Mitglieder ihre Fragebögen ein. Die Datenqualität vor der Bereinigung war weiterhin uneinheitlich. Das Monitoringsystem sollte daher weiter verfeinert werden.

Der diesjährige Bericht konzentriert sich auf zwei Schwerpunktthemen: existenzsichernde Einkommen und Agroforstwirtschaft.

Existenzsichernde Einkommen: Ermutigende Anzeichen, doch die Fortschritte bleiben fragil
Gegenüber 2024 ist der Anteil der Kakaobauernhaushalte, deren Einkommen über dem Referenzwert für ein existenzsicherndes Einkommen liegt, in den gemeldeten Daten deutlich gestiegen. Dies weist auf Fortschritte hin. Ob die Verbesserungen angesichts der 2026 gesunkenen Kakaopreise Bestand haben, bleibt jedoch abzuwarten. Zudem sind die gemeldeten Daten weiterhin nur eingeschränkt vergleichbar.

Die Zahl der kakaoproduzierenden Haushalte, die von einer Strategie für existenzsichernde Einkommen erfasst wurden, stieg zwischen 2024 und 2025 weiter an. Ihr prozentualer Anteil an den direkten Lieferketten der Mitglieder blieb dabei weitgehend stabil. In ihren Strategien setzten die Mitglieder weiterhin auf eine Kombination einkommensbezogener Maßnahmen. Am häufigsten wurde die Unterstützung verbesserter Anbaupraktiken gemeldet, gefolgt von der wirtschaftlichen Stärkung von Frauen und einem verbesserten Zugang zu Finanzdienstleistungen.

Finanzielle Maßnahmen stützten sich weiterhin hauptsächlich auf volumenbasierte Prämien. Zwar nahm die Zahlung von Referenzpreisen für ein existenzsicherndes Einkommen (Living Income Reference Prices, LIRP) gegenüber dem Vorjahr zu, jedoch weiterhin nur für einen kleinen Anteil der beschafften Mengen. Erste Daten zu Beschaffungspraktiken deuten zudem darauf hin, dass langfristige Geschäftsbeziehungen mit Kooperativen noch nicht durchgängig üblich sind. Da entsprechende Fragen zu Beschaffungspraktiken in diesem Jahr erstmalig aufgenommen wurden, ist jedoch von Unterschieden in der Auslegung und Berichterstattung durch die Mitglieder auszugehen.

1 Es wird erwartet, dass die GISCO-Ziele sowie die Definition des Begriffs „Nachhaltigkeit" überprüft werden, unter anderem um die Einhaltung der europäischen Empowering Consumers Directive (EmpCo) sicherzustellen.

Agroforstwirtschaft: Ausweitung bei uneinheitlichen Fortschritten

Die Mitglieder berichteten von einer deutlichen Ausweitung von Agroforstwirtschaft in ihren Projekten und Lieferketten. Den gemeldeten Daten zufolge betrug der Zuwachs etwa 30 Prozent. Die Fortschritte waren zwischen den Mitgliedern jedoch sehr uneinheitlich verteilt: Die Ausweitung wurde maßgeblich von einer vergleichsweise kleinen Zahl von Mitgliedern vorangetrieben, während einige andere Programme stagnierten oder sogar rückläufig waren.

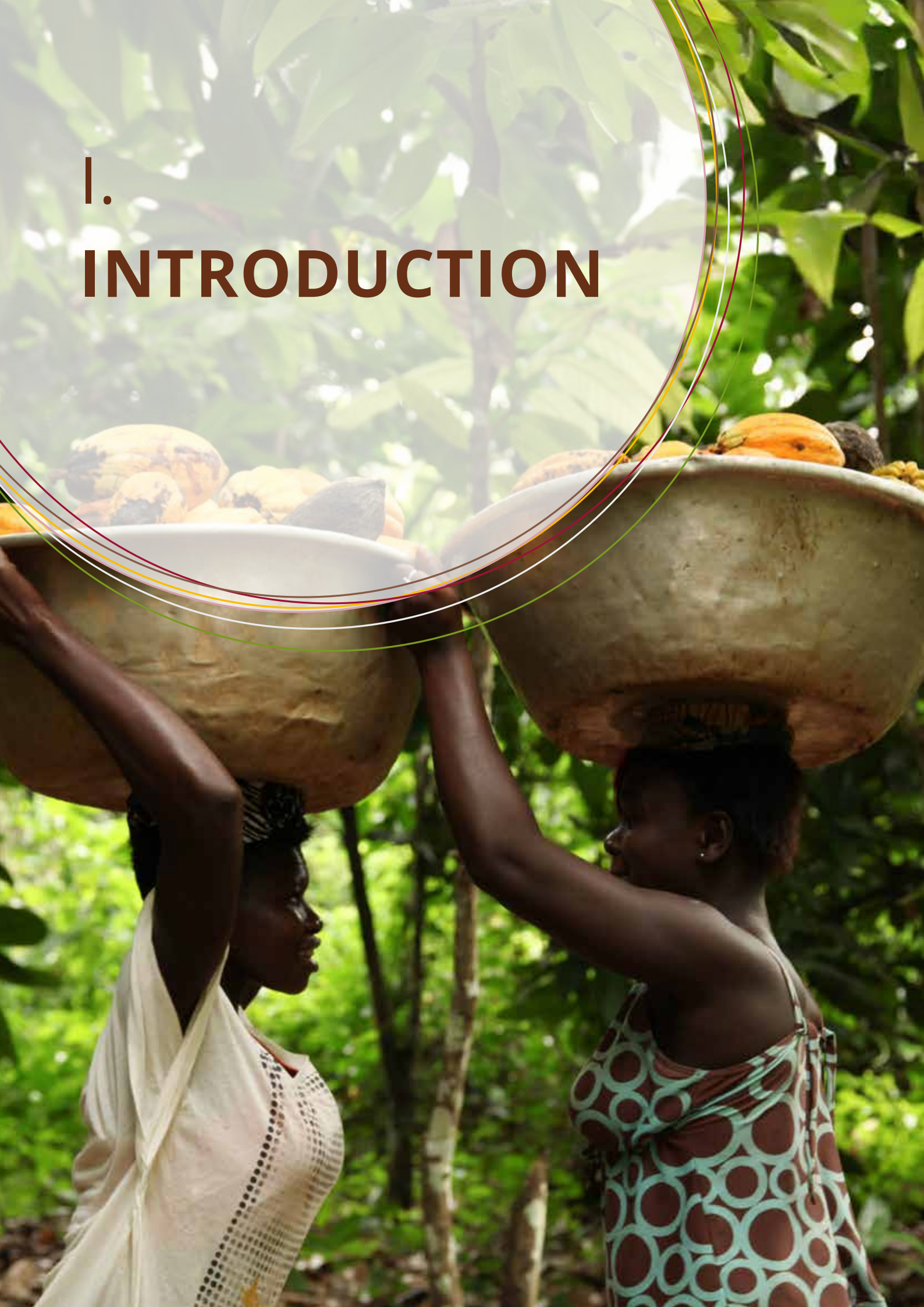
Die Mitglieder meldeten rund 480.000 Hektar neu angelegte Agroforstsysteme. Etwa die Hälfte dieser Fläche entfiel auf Basissysteme; fortgeschrittene und dynamische Systeme machten kleinere Anteile aus. Die gemeldete Überlebensrate der Bäume nach zwei Jahren lag 2025 bei 62 Prozent und damit ähnlich hoch wie im Vorjahr. Wie bisher berichteten nur wenige Mitglieder dazu.

Der Anteil der Kakaomengen, bei denen die Mitglieder einen Anbau in Agroforstsystemen nachvollziehen konnten, blieb niedrig. Dieser Anteil dürfte die tatsächliche Quote unterschätzen, da die Rückverfolgbarkeit von Mengen aus Agroforstsystemen weiterhin eine Herausforderung darstellt.

Prioritäten für die Zukunft

Die Ergebnisse verdeutlichen, dass wirksame Programme für existenzsichernde Einkommen und Agroforstwirtschaft ausgeweitet werden müssen, während zugleich weiter an einer Angleichung der Messmethoden gearbeitet wird. Fortgesetzter Austausch und gemeinsames Handeln bleiben wichtig, um die gemeldeten Fortschritte weiter voranzutreiben und zu verstetigen.





I. INTRODUCTION



1.1 BACKGROUND AND PURPOSE OF THE REPORT

The German Initiative on Sustainable Cocoa (GISCO) is a joint initiative of the Federal Government (represented by the German Ministry for Economic Cooperation and Development [BMZ] and the German Ministry of Agriculture, Food and Regional Identity [BMLEH]), the German confectionery industry, the German retail grocery trade, and civil society – including standard-setting organisations. Together, the multi-stakeholder initiative aims to improve the livelihoods of cocoa farmers and their families, conserve and protect natural resources and biodiversity in cocoa-producing countries, as well as increase the cultivation and commercialisation of sustainably produced cocoa.

Its **ten goals** (first agreed in 2019 and further adapted in the subsequent years), flanked by a **comprehensive definition of sustainable cocoa**, reflect the Initiative's commitment to addressing the critical challenges in the cocoa sector. A monitoring system is crucial for tracking progress toward these ten sustainability goals, allowing members to demonstrate their contributions and identify areas needing improvement. The monitoring report hence offers a snapshot of the current level of achievement based on the data collected for the reporting year 2025. It aims to provide insights into members' overall progress toward a sustainable cocoa sector and drive future actions. Please note that data is provided by the members and not externally verified.

The following chapters of this report – **'Methodology'** and **'Data Overview'** – examine participation in the monitoring, outline the methodology, and assess the quality of the data collected. Section II 'Focus Topics' delves into the two thematic priorities of this year's report: **Living Income** and **Agroforestry**.

Living Income has been GISCO's priority topic since 2024. Among others, members have communicated their individual Roadmaps outlining how they contribute to achieving GISCO's Living Income Goal. **Agroforestry** addresses pressing challenges related to farmer incomes and climate resilience. Therefore, coordinated action on agroforestry can be both impactful and timely.

Other GISCO monitoring indicators are compiled in Section III, along with a short summary of the data.



1.2 METHODOLOGY

For the reporting year 2025, several changes were introduced to the GISCO monitoring system. The adjustments aimed to improve data quality and update the questionnaire to better align with the evolving goals of GISCO and its European partner initiatives. To decrease ambiguities, a new definition of the term 'Living Income Strategy' was adopted. It provides orientation on the 'smart mix' requirement and clarifies the role of sustainable procurement practices. The definition was developed jointly by the Belgian, Dutch, German, French and Swiss initiatives for sustainable cocoa (ISCOs).

To measure progress on the shared ISCO targets on sustainable procurement practices, several new or adapted indicators were introduced on the European level. This included a revision of the existing premiums questions as well as new questions on contract provisions and long-term agreements with cooperatives.

In addition, Ecuador was added to the list of origins requiring country-level disaggregated reporting. This reflects the growing importance of Ecuador as a sourcing country. This year's reporting on Ecuador remained, however, limited.

TABLE 1: CHANGES TO THE 2026 GISCO MONITORING SYSTEM

CHANGES TO THE MONITORING SYSTEM	EFFECT ON THE COLLECTED DATA
Updated definition on 'Living Income Strategy'	The data on Living Income strategies still point towards various interpretations and visions on a living income strategy. Overall, members seem to apply a mixture of measures, which is in line with the 'smart mix' requirement, though it is less clear to what extent procurement practices that meet the definition are included by members as part of the mix (see also next point).
Additional questions on procurement practices	Mixed response rates for new procurement questions. Data cleaning identified some issues with the interpretation of some of the questions, pointing toward a need for further specification.
Increased country differentiation – Ecuador added to the list of countries requiring country-level disaggregated reporting	Only a limited number of members reported on Ecuador (2 BMZ projects and reporting from 4 supply chain members on various topics). The high number of country-differentiated data points resulted in increased monitoring workload for members.

Data was submitted via the **online monitoring tool** during April and May 2026, covering the reporting period from 1 January to 31 December 2025. This year, GISCO continued offering members the option of a voluntary data transfer from the International Cocoa Initiative (ICI) to the Initiatives on Sustainable Cocoa in Europe (ISCOs) for data related to child labour. This year, this option was expanded to also include forced labour data.

Once submitted, the data was reviewed for completeness and plausibility. This included year-on-year comparisons of individual member data, identification of outliers, and cross-checking with external sources. If data seemed implausible, the GISCO Secretariat followed up with the respective members.



DATA CLEANING METHODOLOGY

Data cleaning is carried out in several stages to ensure that the monitoring dataset is as complete, accurate and consistent as possible for analysis. The approach combines an initial dataset-wide review with follow-up with members and more targeted data cleaning for selected focus topics (Agroforestry and Living Income).

Standard data-cleaning process
The standard data-cleaning process consists of three main steps and is applied where data gaps, inconsistencies, or potential outliers are identified.

- **Step 1: Identification of data gaps and outliers** The full dataset is reviewed to identify missing data, inconsistencies, unusual values, and potential outliers. This initial screening is used to flag records and indicators that may require further verification or clarification.
- **Step 2: Clarification and feedback from members** Where potential data issues are identified, the relevant member is contacted for clarification. Members are asked to verify the information reported and, when necessary, provide additional context or explanations.
- **Step 3: Correction and completion of data by members** Following the clarification process, members correct the relevant information directly in the monitoring/data collection tool and/or provide additional data or explanations. These corrections and additions are subsequently integrated into the dataset used for analysis.

For members participating in more than one ISCO, data-cleaning efforts are coordinated with the other relevant ISCOs. This is intended to align requests to members, avoid duplication, and support consistent treatment of data across initiatives.

Enhanced thematic data cleaning
In addition to the standard process, further data cleaning is undertaken during the analysis of selected focus topics. This more detailed review can identify inconsistencies, methodological differences, or information gaps that may not have been apparent during the initial dataset-wide screening.

Focus topics are prioritised for this additional data-cleaning step. This year, the topics were Living Income and Agroforestry. Relevant data points for both topics are reviewed in greater depth to support consistent and meaningful analysis. Where additional data gaps, inconsistencies, or methodological differences are identified during this thematic review, further clarification may be sought from members and corrections incorporated into the dataset as needed.

Data-cleaning approach for other thematic areas
The level of additional data cleaning across the other monitoring topics varies, depending on the nature of the data and the responsibilities of partner organisations.

- **Transparency and traceability:** Priority data points include global volume sourced, number of households in the direct supply chain and procurement-related questions.
- **Deforestation-free cocoa:** For this topic, Steps 1–3 of the standard data-cleaning process are applied when data issues are identified.
- **Child labour and forced labour:** Steps 1–3 are applied to data collected through the ISCO monitoring tool. In addition, data shared by ICI are cleaned by ICI prior to data sharing.
- **Other environmental topics:** For other environmental topics, Steps 1–3 of the standard data-cleaning process are applied when data issues are identified.

Draft results and key findings on the focus topics were then presented to the Monitoring Task Force[2] in September 2026. In addition, draft results and recommendations were discussed by the Task Forces Living Income and Environment. Incorporating feedback from all these Task Forces, a full draft monitoring report was prepared and again circulated with the Task Force Monitoring for further review and finalisation.

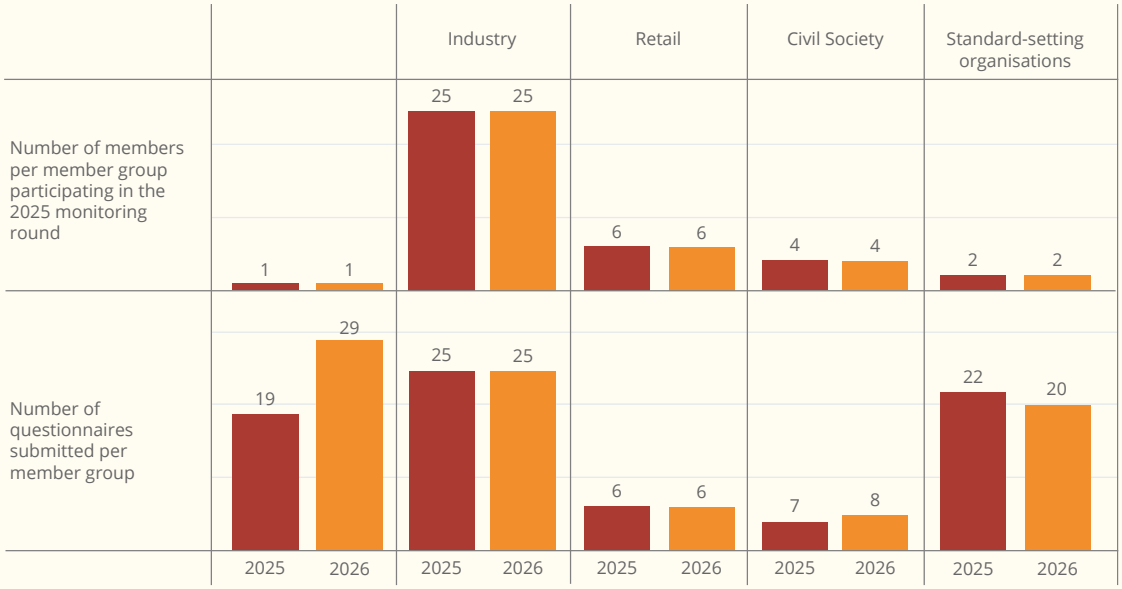
2 GISCO currently has three Task Forces: Task Force Living Income, Task Force Environment and Task Force Monitoring. Task Forces advise the Executive Board on content issues. The Task Forces comprise GISCO representatives who work on a voluntary basis. For further information see here: **Organisational Structure - FORUM NACHHALTIGER KAKAO e.V.**



1.3 DATA OVERVIEW

Like in the year before, members with low cocoa volumes and without relevant projects were exempt from the monitoring process. All required members participated in this year's reporting (see Figure 1). The number of project questionnaires submitted by the German government and the civil society group increased slightly.

FIGURE 1: PARTICIPATION IN THE 2026 GISCO MONITORING ROUND



EXPLANATION OF KEY TERMS

Indicator
A predefined metric within the GISCO monitoring framework used to track progress toward specific goals.

Data Point
A single reported value linked to a specific indicator. Each data point corresponds to one record, which may originate from an individual project, country-level reporting by a member, or a combination of both. Where applicable, footnotes clarify the source of data points for each indicator.

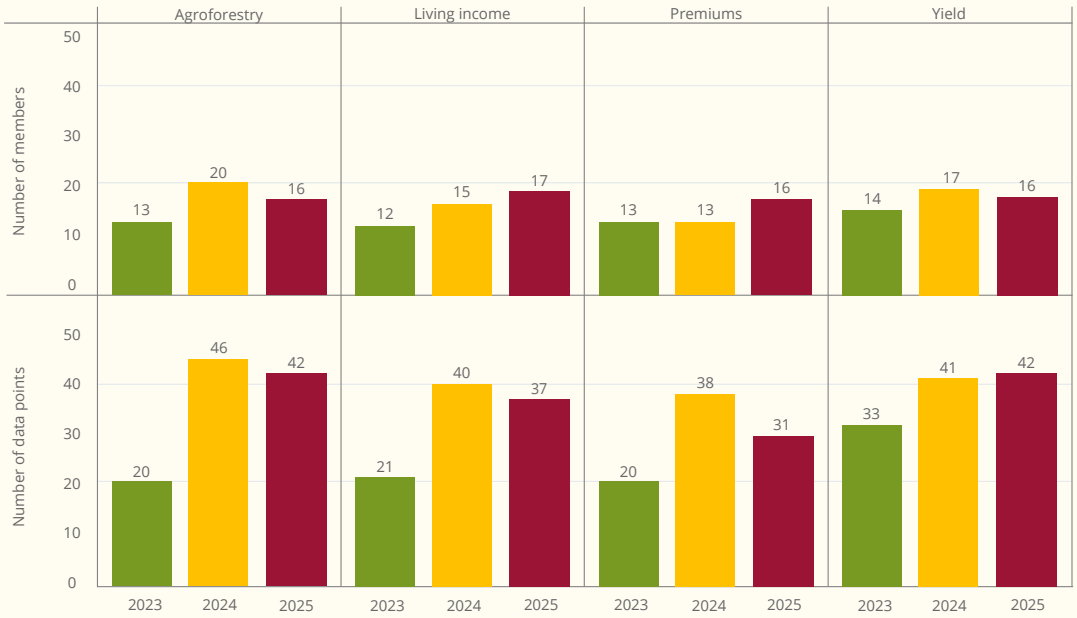
Number of Members Reporting
The number of GISCO members that submitted data for a given indicator. In the figures, this is always shown below the aggregate values and helps show how widely the indicator was reported on.



While all required GISCO members participated in the monitoring, not all of them reported on all the topics. Compared to last year, there is no clear trend. While slightly more members reported on living income and premiums, reporting on agroforestry and yields slightly went down. At the same time, the number of country-disaggregated data points decreased for all selected topics except yield.

As members are only required to report on the topics they actively work on, fluctuations in the number of reporting members may indicate a shift in focus. For Living Income and Premiums, the increase in members reporting may have been caused by the above-mentioned changes to the questionnaire (see Figure 2).

FIGURE 2: REPORTING ON SELECTED SUSTAINABILITY TOPICS



Based on this year's experiences, several areas of improvement were identified. Recommendations aim to achieve an improvement of the data quality:

- During the data cleaning process, it became apparent that monitoring questions were not always interpreted consistently by members. Therefore, GISCO should review these questions to make them clearer and reduce ambiguities.
- GISCO should continue to seek dialogue with members submitting low-quality data, as data cleaning efforts were necessary for the majority of the members who submitted data on the two focus topics. For joint members, such engagement should be coordinated with the other ISCOs.
- GISCO should explore opportunities to harmonise the GISCO monitoring with *Corporate Sustainability Reporting Directive* (CSRD) requirements. If such alignment is possible, it could provide additional incentives for industry members to invest in data quality.
- GISCO should seek opportunities to further integrate monitoring requirements with the GISCO Roadmap[3] process. This could strengthen the individual responsibility aspect of the monitoring process while reducing the overall reporting burden for members.

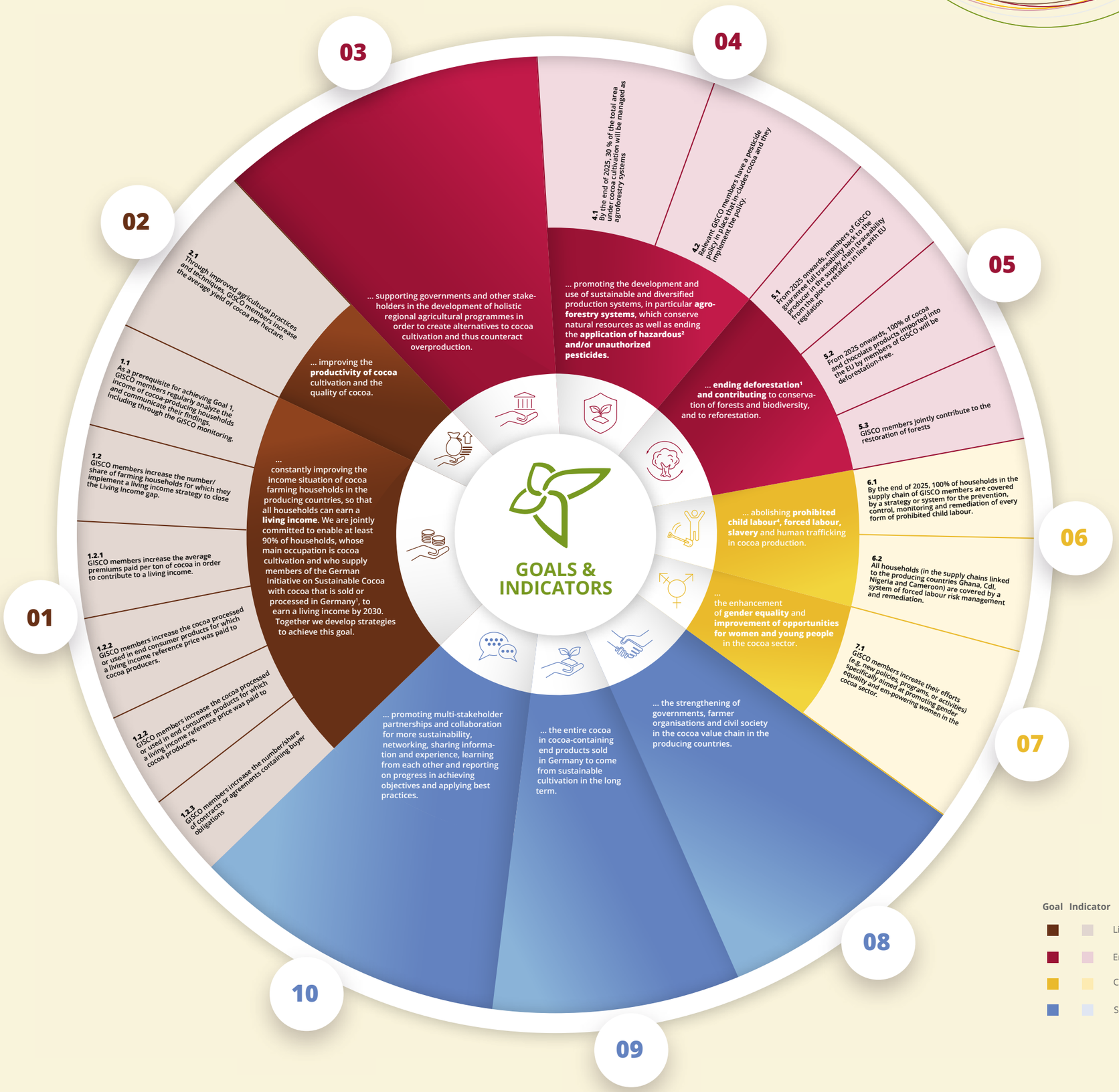
3 In their roadmaps, GISCO members outline their individual contributions to the collective GISCO goals. They set themselves targets and milestones related to child labour, living income, transparency, deforestation / agroforestry and certification. Every other year, they submit progress reports on these topics. This exercise is mandatory for all GISCO members.



At EU level, the CSRD and the *Empowering Consumers Directive* (EmpCo) are expected to strengthen requirements for sustainability reporting and the substantiation of consumer-facing environmental claims. The CSRD requires companies within its scope to report on material social and environmental impacts, risks and opportunities, while EmpCo introduces rules to prevent misleading environmental claims and strengthen their substantiation. These developments may improve the availability of sustainability data and facilitate the exchange of relevant information along supply chains. However, the extent to which they improve the data quality of GISCO reporting will depend, among other factors, on the sustainability topics that members consider relevant for their consumer-facing communication and mandatory CSRD disclosures, as well as on the comparability and alignment of the data collected for GISCO's reporting requirements.

OVERVIEW OF THE 10 GISCO GOALS & INDICATORS

WE ARE JOINTLY COMMITTED TO ...



[1] Including for export

[2] Hazardous pesticides include as minimum requirement all substances which (1) are listed as "persistent organic pollutants (POPs)" in the Stockholm Convention within the Annex III of the Rotterdam Convention and/or the Montreal Protocol, (2) are classified by WHO as A1 or 1B, (3) are listed in the "Dirty Dozen" of PAN, or (4) are identified by UN-GHS as substances with "chronic toxicity". In addition, specifically for cocoa cultivation, they include pesticides that are not permitted for use in export goods to EU countries. (Further definition as for agroforestry systems will be included within the KPIs.)

[3] According to FAO, deforestation is the conversion of forest to another land use or the long-term reduction of tree canopy cover below the 10% threshold.

[4] Prohibited child labour is child labour as defined in ILO Conventions 138 and 182. According to the ILO, child labour includes formal or informal work undertaken by people under the age of 18 in the private or public sector with or without pay. If this violates statutory standards (e.g. age restrictions or maximum working hours), it counts as child labour.



II.
FOCUS TOPICS



2.1 LIVING INCOME FOR COCOA FARMING HOUSEHOLDS

Living Income (LI) has emerged as a pivotal focus for GISCO over the past years, serving not only as a crucial mechanism for poverty reduction but also as an essential lever in addressing various sustainability challenges, such as child labour.

The significance of LI has been further emphasised in the ISCO 2.0 framework, which highlights its relevance across all European cocoa platforms as well as in the latest phase of Pro-Planteurs – both underscoring the critical role of procurement practices in advancing the LI agenda. In light of this, the ISCOs have incorporated new monitoring questions regarding procurement practices in this year's monitoring round, which are included for the first time in this report.

The dynamics of international cocoa prices are particularly relevant in this context. Although cocoa prices in 2025 were still significantly above those of previous years, they began to decline towards the end of 2025, creating an environment that could challenge the progress made in achieving a LI for some farmers. This volatility culminated in a dramatic drop in early 2026, further complicating the landscape for stakeholders committed to improving the livelihoods of cocoa farmers. The fluctuating prices underscore the need for robust LI strategies that can withstand market pressures and ensure sustainable income for producers.

Currently, the GISCO member roadmaps pertaining to LI exhibit a varied level of ambition. At the end of 2026, when progress reports on the LI roadmaps are due, members again will have an opportunity to reassess and potentially enhance the ambition of their commitments.

This section presents GISCO monitoring data related to Goals 1 and 2. The report first covers the results of measuring the LI gap, followed by a closer look at selected strategies to close that gap.

Measuring the LI Gap

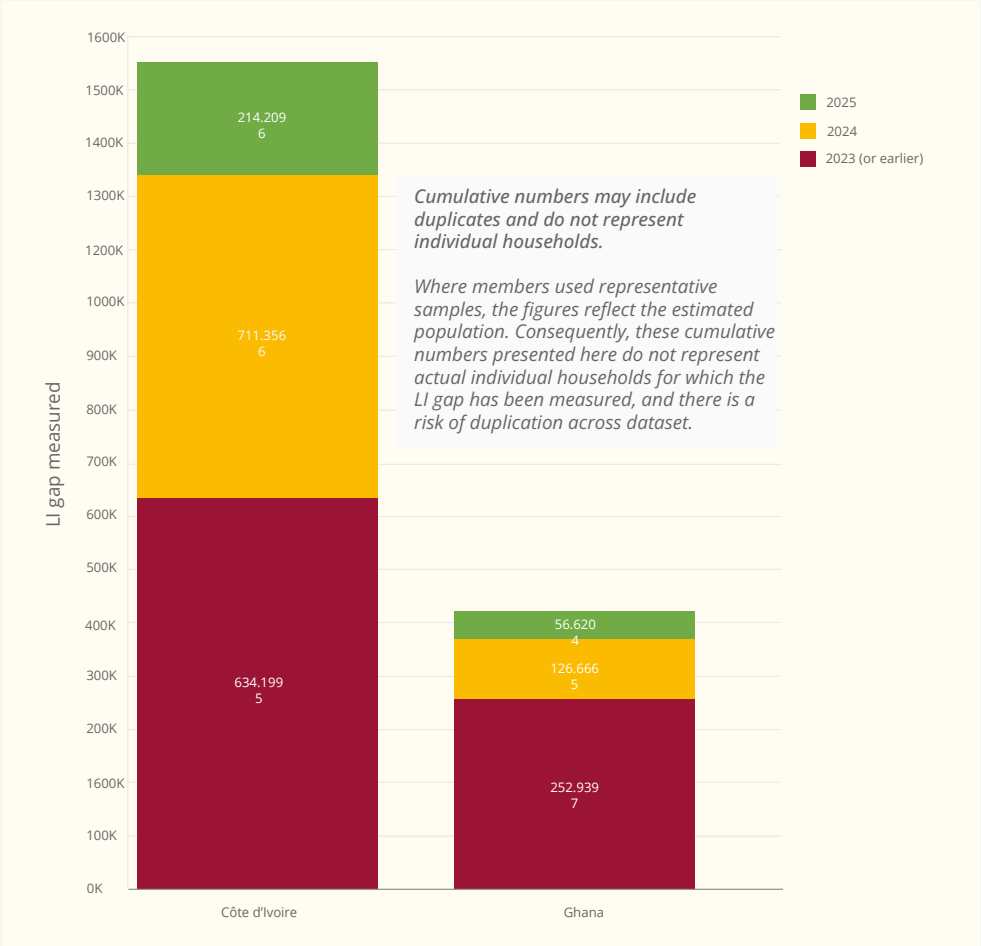
An important step towards implementing a LI approach is measuring the LI gap. Understanding the income level of cocoa-producing households within the supply chain is essential for identifying appropriate LI interventions and assessing their effectiveness.

Figure 3 presents the LI gap measurements reported by GISCO members in Côte d'Ivoire and Ghana, providing an overview of progress in assessing household income levels against the LI benchmark. The 2025 figures are preliminary, as income data collection and processing take time, and additional measurements may be reported in the next monitoring cycle. The data will be updated as further information becomes available.

2024 data points to continued efforts by members to build a better understanding of household income levels.



FIGURE 3: NUMBER OF HOUSEHOLDS FOR WHICH THE LI GAP IS MEASURED (CUMULATIVE)



The corrected 2024 data, which includes three additional members, points to continued efforts by members to build a better understanding of household income levels and the LI gaps.[4]

Measurement activities continue to be particularly pronounced in Côte d'Ivoire, where substantially more measurements were conducted than in Ghana.[5]

In addition to Côte d'Ivoire and Ghana, LI gap measurements were only sparsely reported for Brazil, Ecuador, Papua New Guinea, Indonesia, Nigeria, Uganda, and Cameroon, limiting the ability to assess LI progress across the wider cocoa sector.

Only 52% of supply chain members have reported LI data since 2023: A total of 16 members have reported on LI gap measurements, including 5 out of 6 retailers, 8 out of 21 manufacturers, and 3 out of 4 traders. Of these, 7 members have provided data for more than one year. This suggests that only a relatively limited proportion of supply chain members are currently able to provide measurement data. However, annual measurement is not required; rather, regular measurement over time is intended to help members build a better understanding of the income situation of farmers in their supply chains and track changes in the living income gap (see also **guidelines**). The current reporting therefore provides some indication of members' engagement with LI gap measurement, while the increasing availability of data over multiple years will be important for identifying trends and assessing progress over time.

4 Where members used representative samples, the figures reflect the estimated population; however, not all members used representative sampling methods to measure the LI gap. Consequently, these cumulative numbers presented here do not represent actual individual households for which the LI gap has been measured, and there is a risk of duplication across datasets.

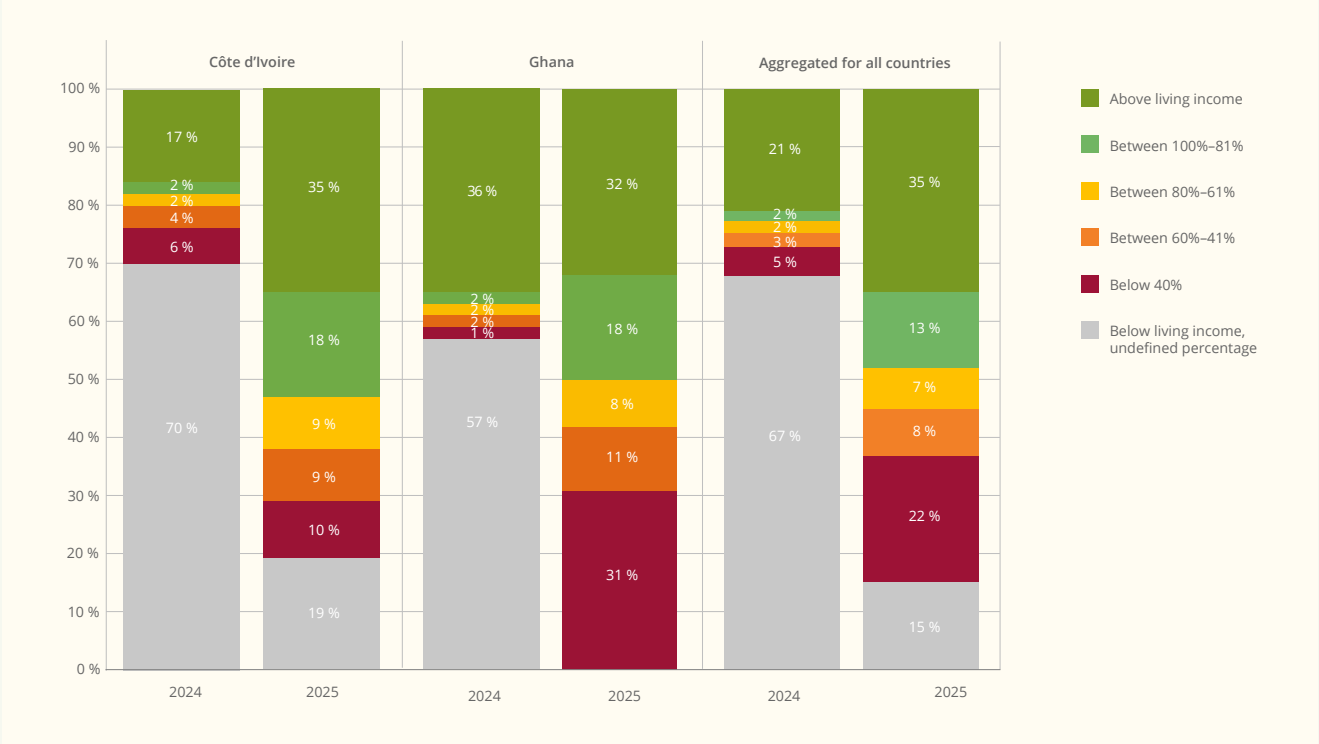
5 It is also important to note that the year refers to the year in which the LI gap was measured. As the corresponding question was introduced into the monitoring questionnaire only in 2024, the 2023 figure includes all members that reported having measured the LI gap, regardless of whether the measurement itself took place in 2023 or earlier. This should be considered when comparing the figures across reporting years.



Preliminary monitoring data points indicate that a substantially higher number of farmers reached or exceeded the living income benchmark in 2025 compared with the previous year.

In 2025, 35% of cocoa-farming households for which the LI gap was measured were above the LI benchmark, compared with 21% in 2024 (see Figure 4). This increase was driven primarily by developments in Côte d'Ivoire, while Ghana recorded a slight decline in the share of households above the benchmark.

FIGURE 4: INCOME OF COCOA FARMING HOUSEHOLDS IN RELATION TO LI BENCHMARK



Nevertheless, the results should be interpreted with caution. The number of households covered by LI gap measurements in 2025 was significantly lower, or the relevant data had not yet been reported by all members. In addition, the composition of the reporting members differs between years, meaning that the results cannot be interpreted as evidence of changes in incomes of the same households over time. The higher share of households classified as 'below LI, undefined percentage' in 2024 further limits the comparability of the data. Members have attributed the continued use of this aggregated category, among other factors, to challenges in transmitting data along the supply chain.

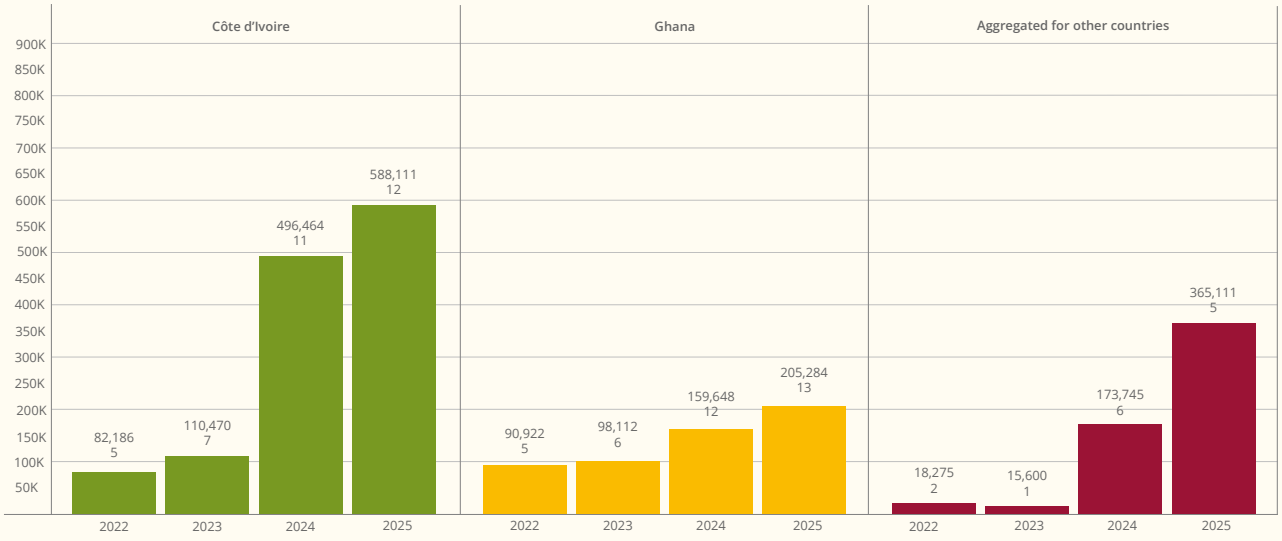
Looking ahead, the decline in cocoa prices of almost 60% between October 2025 and early 2026 is expected to place considerable pressure on cocoa farmers' incomes. The effects of this decline may become increasingly apparent in the 2026 monitoring data.



Implementation of a LI strategy[6]

The number of cocoa-farming households covered by a LI strategy continued to increase between 2024 and 2025 (see Figure 5).

FIGURE 5: NUMBER OF FARMING HOUSEHOLDS IN GHANA AND CÔTE D'IVOIRE FOR WHICH A LI STRATEGY HAS BEEN IMPLEMENTED



The number of households covered by a LI strategy continued to increase, while the overall share remained broadly stable.

However, this expansion has not yet translated into a comparable increase in the overall share of households covered within members' direct supply chains (see Figure 6). Across all reported origins, 36% of households in members' direct supply chains were covered by a LI strategy in 2025, broadly unchanged from 2024. The stable share reflects, in part, a simultaneous increase in the number of households within members' direct supply chains, alongside the expansion of LI strategies. Changes in the geographical composition of members' direct supply chains may also influence the weighted average from one year to the next.

6 A LI strategy is a time bound, evidence based plan whose primary objective is to contribute to reducing and ultimately closing, the living income gap* for a defined target group of cocoa farming households in specific geographies. It must include the following minimum components:

1. An analysis of current household incomes and gaps vs. a recognised living income benchmark
2. A theory of change explaining how the strategy will reduce the gap
3. A monitoring, evaluation & learning (MEL) plan

A living income strategy uses a combination, or 'smart mix' of strategies that target multiple income drivers. Multiple income drivers** are strategically assessed for the purpose of closing the living income gap (as part of the analysis [1] and theory of change [2]).

The drivers to address are then chosen based on their potential for closing the living income gap of specific farmer segments and the member's ability to realistically influence them. When designing interventions to address selected income drivers, members should choose different measures*** based on their expected effectiveness and the member's position in the supply chain. For companies, a living income strategy must always include procurement practices in line with the ISCO principles for sustainable procurement practices.****

Income-generating activities or activities that indirectly support income generation (e.g., general community development) are considered part of a living income strategy only when they are designed and monitored for their contribution to closing the living income gap.

* the difference between the actual household income and a recognised **Living Income Benchmark** (current or adjusted)

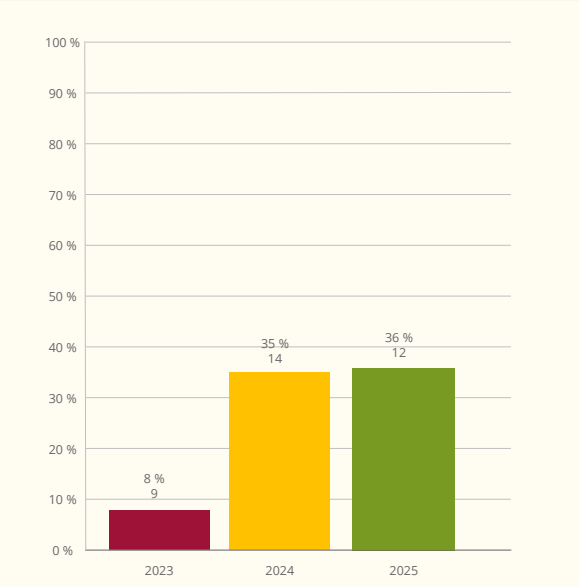
** land size, yield, price, cost of production, diversified incomes, household costs

*** Examples include the provision of training, an adaption of procurement practices, direct cash transfers, consumer engagement, and collaboration in landscape approaches to improve framework conditions.

**** Please refer to the definition of '**sustainable procurement practices**'.

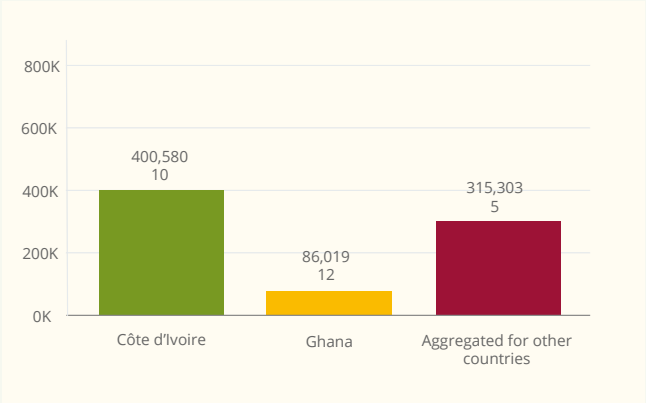


FIGURE 6: WEIGHTED AVERAGE SHARE OF HOUSEHOLDS IN DIRECT SUPPLY CHAINS FOR WHICH MEMBERS ARE IMPLEMENTING LI STRATEGIES



The figures should be interpreted in light of the scope of the available data. The calculation includes members that reported both information on implementation of a LI strategy and the number of households in their direct supply chain. Some additional members reported information on LI but could not be included because they did not provide the corresponding number of households in their supply chain. The figures therefore do not represent the full membership. If members that did not report, as well as members reporting zero households covered by a LI strategy, were included in the calculation, the overall share of households covered would be lower. In addition, it has not been assessed whether all members took the updated definition of a LI strategy into account when reporting their data.

FIGURE 7: TOTAL VOLUME (MT-BE) OF COCOA SOURCED FROM THE REPORTED COUNTRY UNDER A LI STRATEGY IN 2025



From 2025 onwards, GISCO also monitors the volume of MT-BE sourced under a LI strategy (Figure 7). The results are broadly consistent with the household-level data, indicating that LI strategies are also reflected in a share of members' sourcing volumes. Côte d'Ivoire accounts for the largest volume of cocoa sourced under a LI strategy. Overall, 27%[7] of the total volume sourced by members was reported as being sourced pursuant to a LI strategy, based on data from 14 members. This provides an indication of the extent to which LI strategies are reflected in members' sourcing volumes more broadly.

In terms of the specific LI-related activities that members are implementing (Figure 8 and Figure 9), there are few changes compared with the previous year's responses. Farming practices – particularly measures related to productivity, climate adaptation and crop diversification – remain the most commonly reported strategies, followed by approaches such as women's economic empowerment (WEE) and improved access to finance.

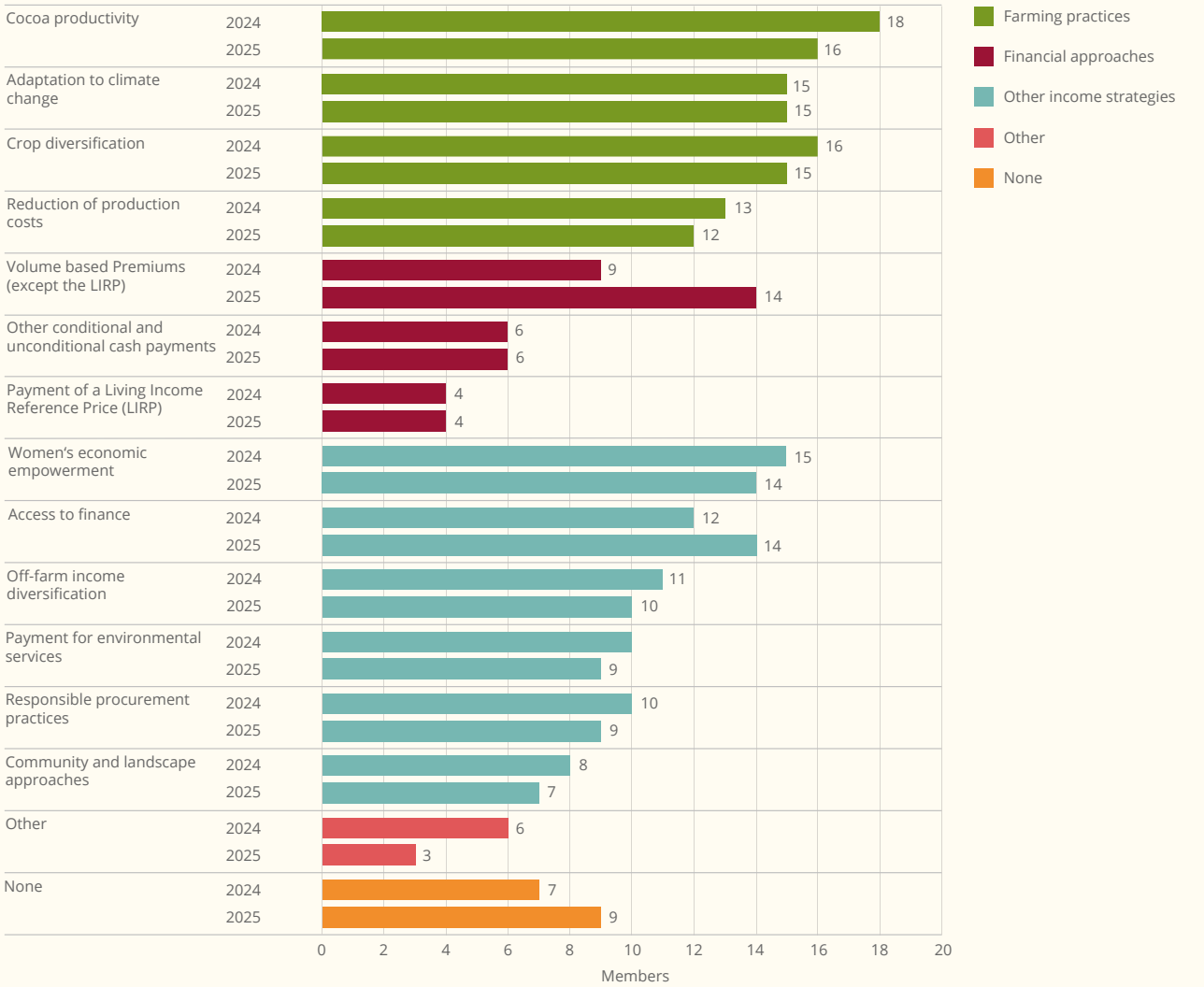
7 To minimise double counting, total sourced volume is calculated using only the reported volumes of GISCO members that are traders. This is an estimate of volumes sourced by all members as most volumes are initially sourced by these traders.
In contrast, volumes sourced under a living income strategy are based on data from all GISCO members reporting on the indicator, as each member is expected to report only the volumes associated with initiatives they have funded. While this calculation method reduces risks of double counting, it still only produces a rough estimation of the overall share of the volume sourced under a LI strategy.



Among financial strategies, the use of premium payments has increased notably. This is likely to reflect underreporting in previous years, as also indicated by the data on premium payments[8]. Other financial approaches, such as Living Income Reference Price (LIRP) payments, remain relatively uncommon (see also below).

Members continue to employ a mix of income-related activities, rather than relying on a single approach. The available data, however, do not provide sufficient information to assess how these different approaches are combined in practice or to which extent they are implemented together.

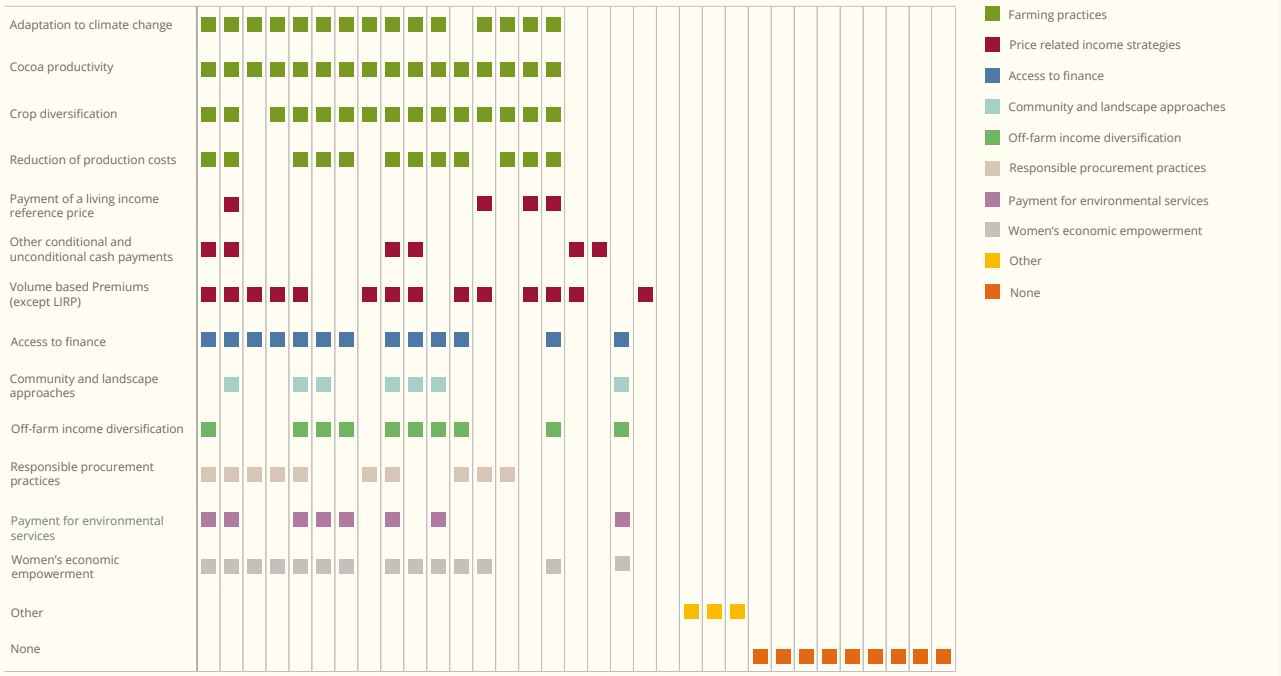
FIGURE 8: IMPLEMENTATION OF LI RELATED ACTIVITIES IN THE SUPPLY CHAIN



8 The assessment reflects a persistent discrepancy between the high share of cocoa reported as certified (96%) and the relatively limited number of data points received on certification-related premiums payments. This is further evidenced by the difference between the number of members reporting that premiums are paid (Figure 9) and the limited volume and payment data available. This seems to be a traceability issue. Premium payments need to be reported per origin while the majority of certified cocoa is sourced under a mass balance system. In particular, members further down the supply chain tend not to have access to detailed information on premium payments, which can limit the availability and completeness of the data reported. Therefore, the absence of reported data should not necessarily be interpreted as an absence of premium payments.

The findings should be interpreted within the scope of the data collected, which cover only supply chain members and do not capture the scale or intensity of the reported strategies. For example, the data does not indicate the amount of financial resources allocated or the number of households reached. The data therefore provides an overview of the types of activities being implemented but does not allow for an assessment of their relative magnitude or reach.

FIGURE 9: IMPLEMENTATION OF INCOME STRATEGIES BY GISCO SUPPLY CHAIN MEMBERS



BOX 1: ADDITIONAL INCOME FROM COCOA PULP

Together with Weinrich, Koa is demonstrating how utilising more of the cocoa fruit can create additional value and income for cocoa producers. Traditionally, farmers generate income mainly from cocoa beans, while the surrounding pulp has had little commercial value. Koa processes this pulp close to farming communities in Ghana, ensuring sufficient pulp remains on the beans for traditional fermentation. Farmers receive direct payment for this additional raw material.

Turning the pulp into marketable ingredients is an essential part of the model. In applications such as whole cocoa fruit chocolates, cocoa-fruit components provide natural sweetness. Product development therefore plays a crucial role: the ingredient must perform reliably in industrial processing while delivering the taste and texture consumers enjoy.

The income effect is measurable. An independent 2025 **study** by 60 Decibels found median additional earnings of GHS 534 per farmer per season from selling cocoa pulp. Furthermore, 46% of farmers reinvested this additional income into paid labour, while 96% reported an overall improvement in their quality of life.

Implementing the supply chain also brought valuable operational insights, particularly regarding compliance with evolving regulatory frameworks such as the EU Organic Regulation. Regulatory adjustments during implementation generated significant administrative and logistical complexities, requiring strict traceability and updated documentation. A key lesson learned is the necessity of building longer planning horizons, buffer times, and extended delivery lead times into the supply chain to ensure seamless compliance.

This experience indicates that an additional income stream for farmers can be generated from previously underutilised crop components. Such efforts need to be supported by robust compliance management, reliable product performance, and sustained market demand.



Financial Approaches

The data on different financial approaches show that volume-based premium payments (other than the LIRP) remain the predominant financial approach among the strategies reported, although it is still likely to be underreported[9]. By comparison, LIRP payments and non-volume-based cash payments remain relatively limited. This indicates that, while different financial mechanisms are being used, volume-based premium approaches (other than the LIRP) continue to represent the main channel (see Figure 10).

FIGURE 10: VOLUME-BASED PREMIUMS, LIRP AND NON-VOLUME-BASED CASH PAYMENTS

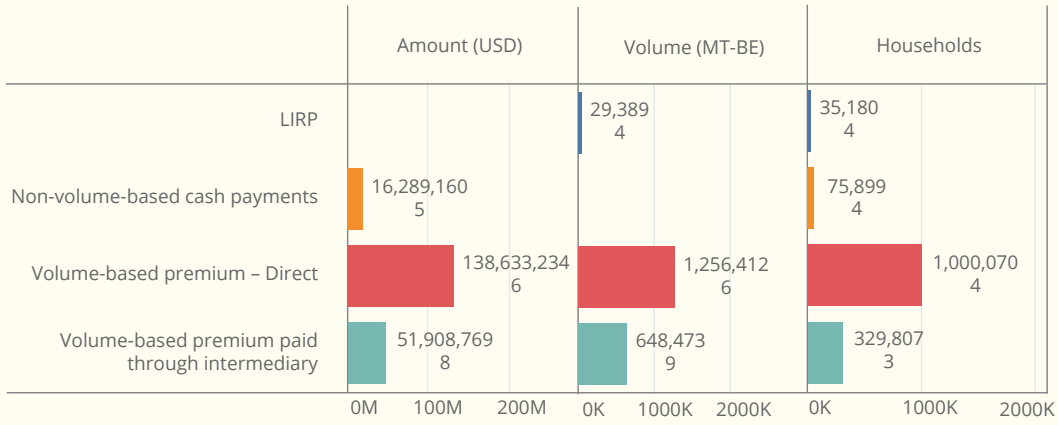
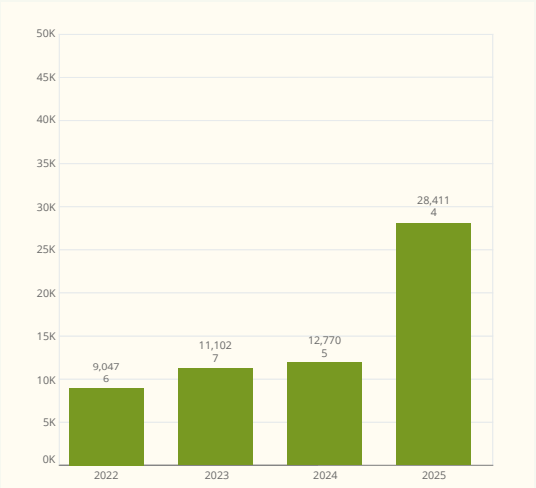


FIGURE 11: VOLUME MT-BE FOR WHICH A LIRP HAS BEEN PAID



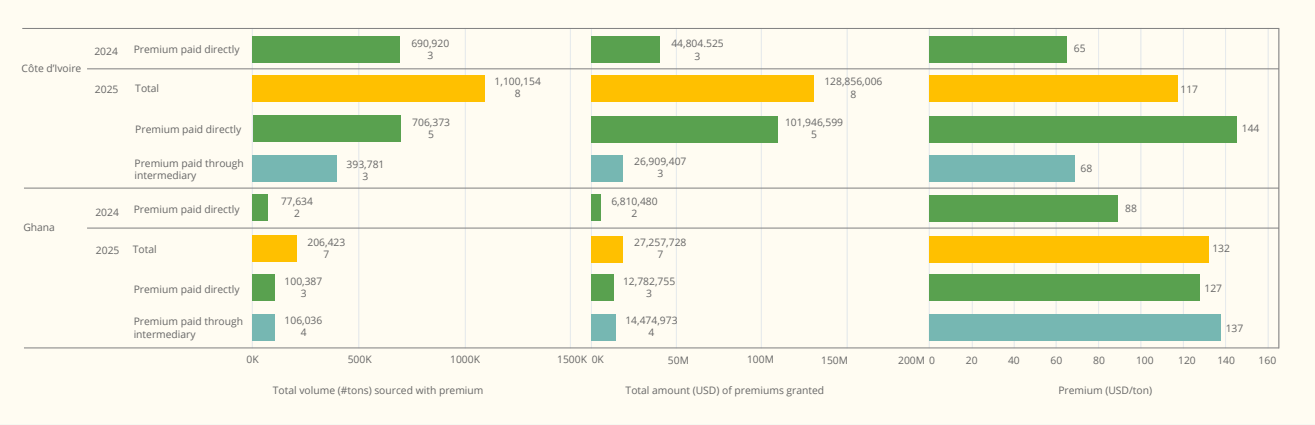
LIRP nevertheless shows a positive trajectory: Four members reported paying a LIRP, either directly or through intermediaries, resulting in a combined volume of 28,411 MT-BE across 32,973 households. This is more than twice the volume reported in the previous year (see Figure 11), stemming from an increase among all four reporting members. However, this represents only 2% of the total volume sourced from Ghana and Côte d'Ivoire[10]. This is signalling growing engagement with LIRP although LIRP is growing from a small base, and its overall volume remains limited compared with other volume-based premium payments. The key indicator going forward will be whether this growth can be sustained and extended to a materially larger share of sourcing, rather than simply continuing to increase from a low starting point.[11]

9 The assessment reflects a persistent discrepancy between the high share of cocoa reported as certified (96%) and the relatively limited number of data points received on certification-related premiums payments. This is further evidenced by the difference between the number of members reporting that premiums are paid (Figure 9) and the limited volume and payment data available. This seems to be a traceability issue. Premium payments need to be reported per origin while the majority of certified cocoa is sourced under a mass balance system. In particular, members further down the supply chain tend not to have access to detailed information on premium payments, which can limit the availability and completeness of the data reported. Therefore, the absence of reported data should not necessarily be interpreted as an absence of premium payments.

10 To minimise double counting, total sourced volume is calculated using only the reported volumes of GISCO members that are traders. This is an estimate of volumes sourced by all members as most volumes are initially sourced by these traders. In contrast, volumes for which a LIRP has been paid are based on data from all GISCO members reporting on the indicator, as each member is expected to report only the volumes associated with initiatives they have funded. While this calculation method reduces risks of double counting, it still only produces a rough estimate of the overall share of the volume sourced for which a LIRP has been paid

11 During the reporting year, farm-gate prices in Côte d'Ivoire and Ghana were above the Fairtrade LIRP. The reported figures capture only LIRP payments made where members had a long-term LIRP commitment and therefore do not provide a complete picture of all payments or pricing practices that may be relevant to LIRP.

FIGURE 12: PREMIUMS PAID TO FARMERS AND/OR COOPERATIVES BY INDUSTRY AND RETAIL MEMBERS



Reported premium payments (other than the LIRP) also increased in 2025, both in terms of the volume of cocoa covered and the total amount of premiums paid (see Figure 12). The data also shows differences in how premiums are channelled: direct payments account for a (64%) of reported premiums in Côte d'Ivoire, while this is only 49% for Ghana. Consequently, premium payments through intermediaries represent a larger share in Ghana. The difference is even more pronounced when considering the value of premiums: around 79% of the reported premium amount in Côte d'Ivoire was paid directly, compared with 47% in Ghana. However, this does not appear to translate directly into the share of premiums reaching farmers. On average, 54% of reported premiums in Côte d'Ivoire were paid to farmers rather than cooperatives, compared with 77% in Ghana. This suggests that the use of intermediaries does not necessarily imply a lower share of premiums reaching farmers and may instead reflect differences in supply-chain structures, cooperative roles, or company payment models.

The reported volume of cocoa covered by Rainforest Alliance premiums and the corresponding total premium amounts remained stable for Côte d'Ivoire and Cameroon while increasing substantially for Nigeria, Ghana and 'aggregated other countries' compared to 2024.

Fairtrade data for 2025 will be available later due to varying reporting timelines. The mandatory Fairtrade premium to be paid to cooperatives was at 240 US$/MT in the reporting year. The table will be updated as soon as communication with standard setters has been agreed upon. Overall, we will continue to work with standard setting organisations to ensure the ongoing inclusion of their data on various monitoring topics.

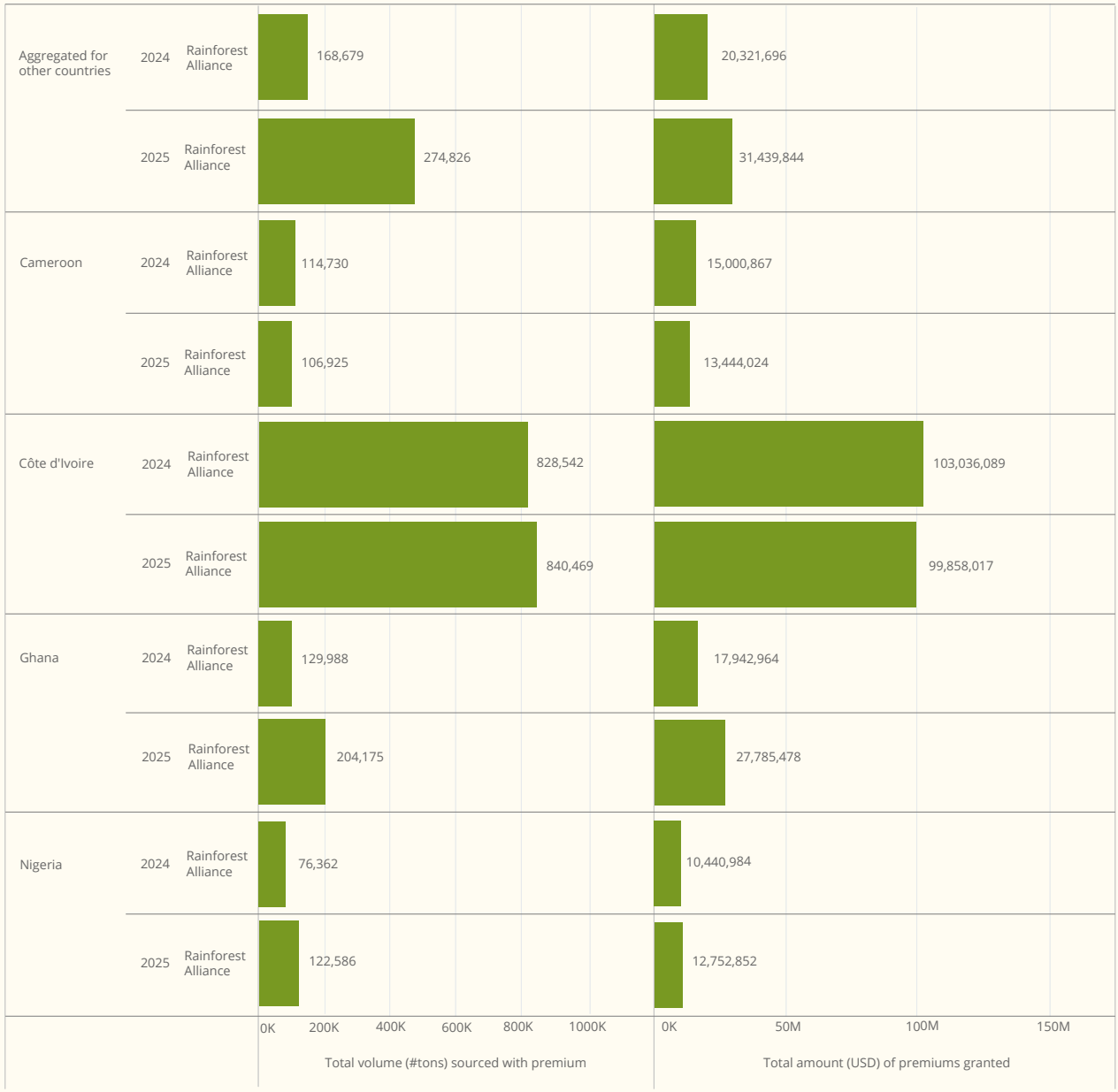
Volumes sourced under a LIRP have more than doubled compared with last year. While this marks a positive development, the overall volume remains small.

Overall, changes in reporting categories, monitoring questions and the composition of respondents over time may affect comparability of premium data. Premium data still seems to be under-reported and the dataset reflects global sourcing activity rather than the German market specifically, and the figures may include duplicate observations.

The reported overall increase should therefore be interpreted primarily as an increase in the reported volume and amount of premiums, rather than as evidence of changes in the level of premiums received by individual farmers.



FIGURE 13: PREMIUMS PAID TO FARMERS AND/OR COOPERATIVES FOR RAINFOREST ALLIANCE CERTIFIED COCOA





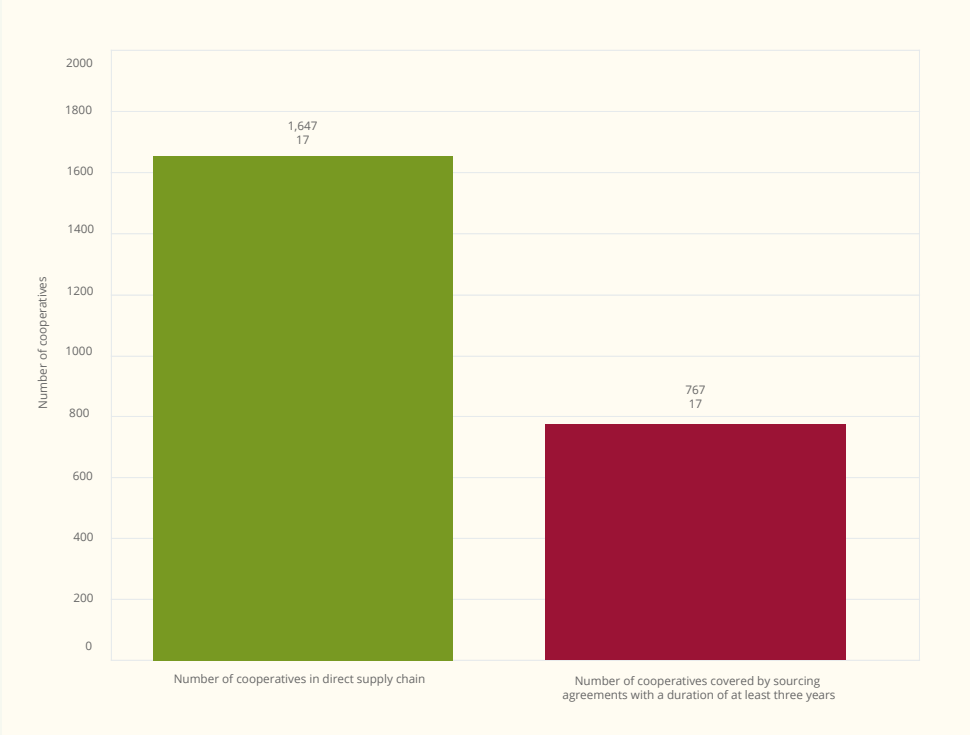
Procurement Practices

This year, the monitoring questionnaire introduced new questions on members' procurement practices, recognising that sourcing arrangements are a **critical component of LI strategies for the ISCOs**. The ISCO criteria for procurement practices cover both the financial terms of sourcing – including 'adequate remuneration covering the costs for sustainable cocoa production, making it profitable and enabling them to reach a living income' – and the nature of sourcing relationships, including 'longer-term relationships and cooperation agreements'. The former is closely linked to the previous section on financial approaches, which examined LIRP payments, non-volume-based cash payments and volume-based premiums. The following paragraphs focus primarily on the latter, exploring the extent to which members establish longer-term relationships and cooperation agreements with their suppliers.

The new data on procurement practices suggest considerable scope to strengthen the use of long-term sourcing relationships.

With respect to the use of longer-term sourcing relationships, the initial results also indicate considerable scope for strengthening. Of the 1,647 cooperatives in the direct supply chain, 767 (47%) are covered by sourcing agreements of at least three years. This suggests that less than half of the cooperatives currently benefit from longer-term sourcing arrangements that can provide greater predictability for both buyers and producers (see Figure 14)[12].

FIGURE 14: PROCUREMENT PRACTICES – SOURCING AGREEMENTS WITH COOPERATIVES



12 Figure 14 should not be interpreted as a count of unique cooperatives across members, as the same cooperative may be part of the direct supply chain of more than one member.

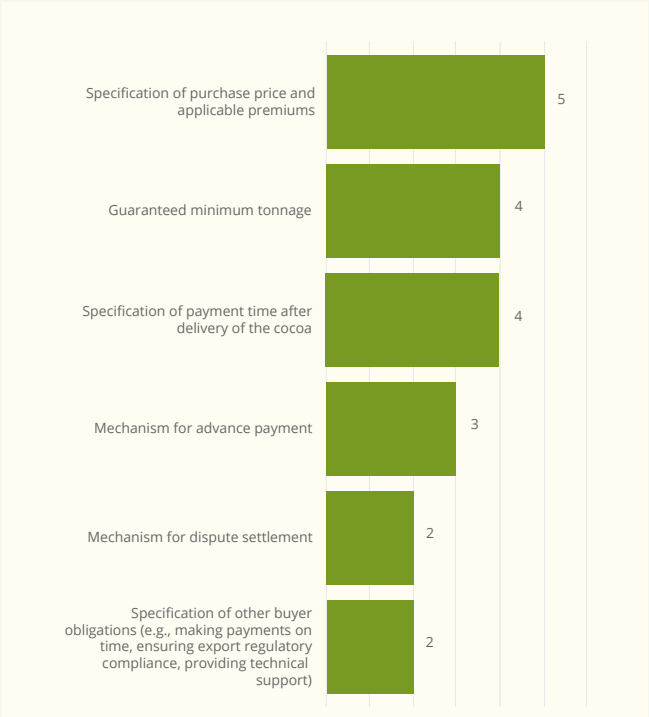
The findings also provide an important starting point for understanding the quality and content of these sourcing agreements. Of the 8 members reporting that they have direct sourcing contracts with farmers, cooperatives or other farmer organisations, 7 provided information on the provisions included. Purchase price specifications were the most commonly reported provision, followed by requirements related to minimum tonnage and payment timelines. Provisions outlining buyer obligations and mechanisms for dispute settlement were reported by only two members each, indicating areas where sourcing agreements could potentially be strengthened to provide greater clarity and shared accountability.

As this was the first year that questions related to procurement practices were included in the monitoring questionnaire, differences in how members interpreted and reported the information were expected. Anecdotal feedback suggests that the scope of the questions was not always understood consistently. The results should therefore be seen as an initial baseline rather than a definitive assessment of procurement practices. Going forward, clearer definitions and guidance will help improve comparability and allow the monitoring to track whether members are increasingly using longer-term, transparent and mutually accountable sourcing arrangements as part of their LI strategies.

FIGURE 15: DIRECT SOURCING CONTRACTS WITH FARMERS, COOPERATIVES AND FARMER ORGANISATIONS



FIGURE 16: PROVISIONS IN STANDARD CONTRACTS

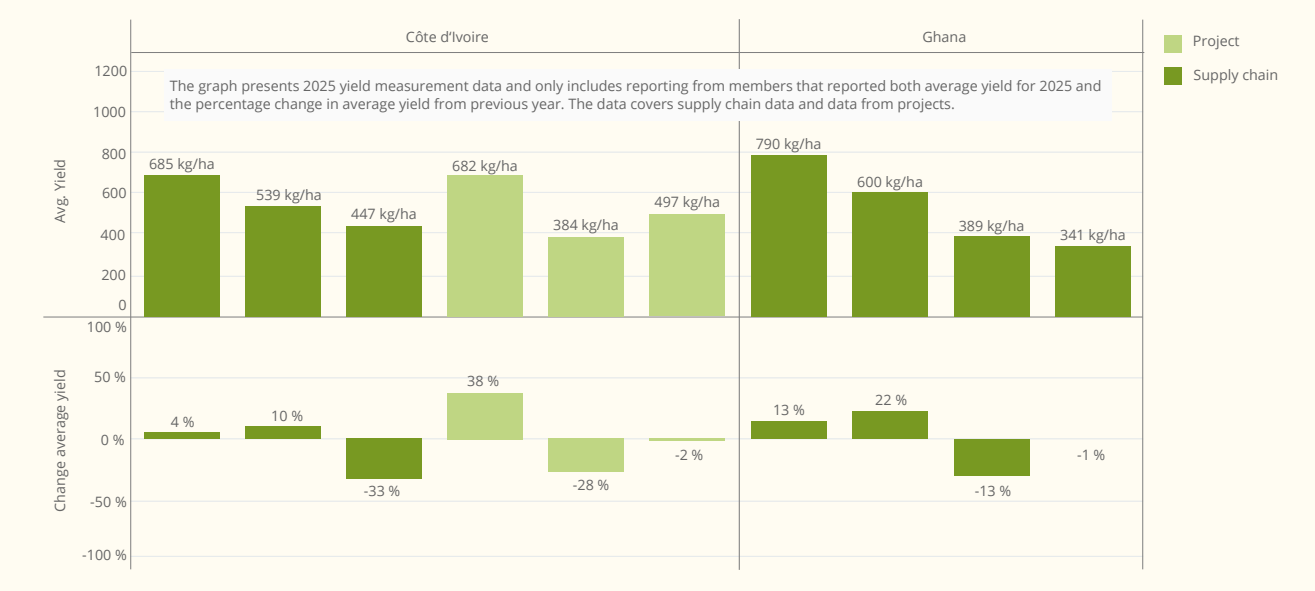


Cocoa productivity

The reported data on yield performance remains difficult to interpret, as results vary considerably across projects and supply chain members[13]. While some achieved strong year-on-year gains of up to 38% in 2025, others recorded declines of as much as 33% over the same period. Ghana records the highest absolute yields (790 kg/ha), but improvements are not consistent across members or geographies. The wide variation in results (ranging from 790 kg/ha to 341 kg/ha) may reflect differences in measurement methodologies, production contexts, strategies, and geographical conditions, making it difficult to draw broader conclusions from the reported figures alone. Understanding the extent to which these factors contribute to the observed differences will be important for making better use of the data and developing a more meaningful narrative around yield performance. This could also help inform future monitoring processes, including greater consistency in measurement and the collection of contextual information that allows changes in yields to be better understood and interpreted.

13 The presented data relates to yield measurements conducted in 2025. It includes data from two BMZ/GIZ projects and one project implemented by a standard-setting organisation in Côte d'Ivoire. Three supply chain members reported data for both Ghana and Côte d'Ivoire, while one additional supply chain member reported data for Ghana only.

FIGURE 17: CHANGE (%) IN YIELD COMPARED TO 2024 PER REPORTED MEASUREMENT



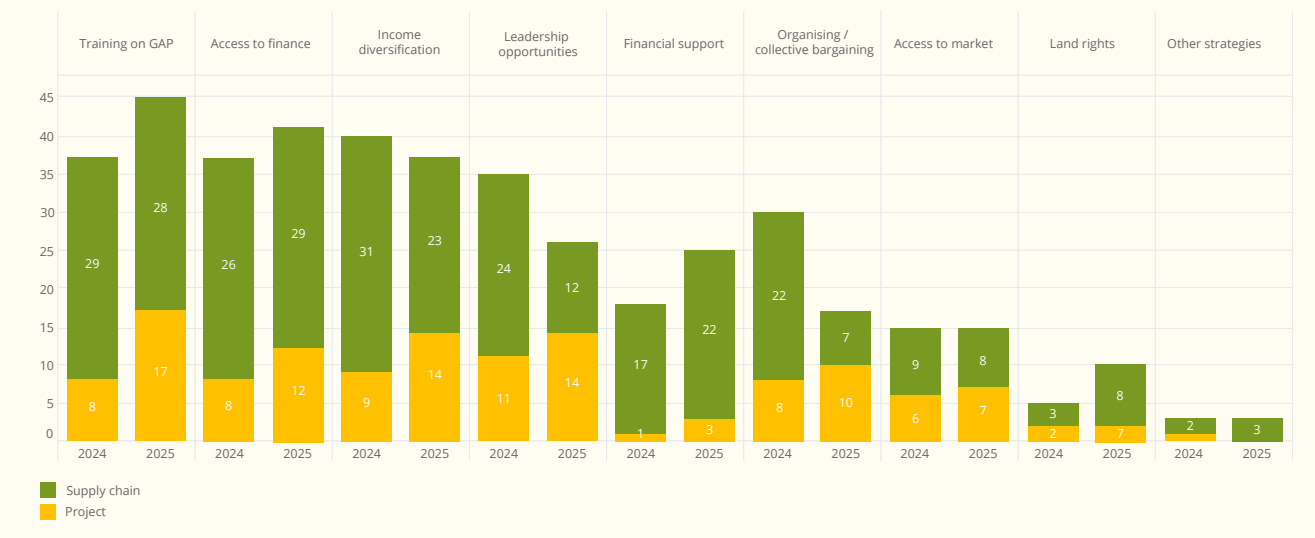
Women's Empowerment

Women's empowerment is one of the approaches that members report implementing as part of their LI strategies. This year, it is again among the three most frequently selected approaches (see Figure 9 above).

The number of individuals reached through women's empowerment activities in supply chains and projects increased by almost 20% in 2025 compared with 2024, from 329,733 to 392,633 (see Figure 18). This is partly driven by more members reporting on WEE: 3 more supply chain members reported to do WEE compared to last year (17 in 2024, 20 in 2025) and 1 more non supply chain member from 2 to 3. The continued prominence of women's empowerment among members' LI strategies suggests that members recognise the importance of addressing gender-related barriers to economic opportunities and income generation as part of their broader efforts to support farmers.

Members increasingly recognise the importance of addressing gender issues as part of their income related approaches.

FIGURE 18: WOMEN EMPOWERMENT STRATEGIES





The distribution of specific activities remained broadly similar to the previous year, with a focus on GAP training, access to finance, and income diversification. Organising women and collective bargaining feature more prominently in projects, while financial support is more common in supply chains. This may reflect that supply chain activities focus more on direct economic support and projects place greater emphasis on collective action and strengthening women's bargaining power.

Conclusions and Recommendations

Overall, the preliminary monitoring results related to achieving a LI indicate an improvement in 2025. As additional data is expected to become available in the next monitoring round, these results may be subject to further revision. Furthermore, it will be important to assess whether the improvements observed in 2025 can be sustained, particularly in light of the decline in cocoa prices in 2026.

The table below provides a snapshot of progress against the relevant GISCO LI indicators, based on the data reported by members. It highlights emerging trends and areas of progress, while also identifying where data limitations make it difficult to draw firm conclusions or where further attention is needed.

TABLE 2: SUMMARY OVERVIEW LI INDICATOR AND CURRENT STATUS

GOAL	INDICATOR	SUMMARY	STATUS
1	GISCO members regularly analyse the income of cocoa-producing households and communicate their findings.	Data on measurement of income levels and LI gap for 2025 not final yet as members typically take longer time to report income data, but data from 2024 suggest continued measurements at a similar level as in the previous year.	Stable progress
1	GISCO members increase the number/share of households implementing a LI strategy to close the LI gap	No significant change in the share of households in the direct supply chain for which a LI strategy is implemented. The weighted average of the volume sourced under a LI strategy is 18%. Data on LI strategies and LI-related activities remains inconsistent. Alignment with the updated definition of the LI strategy appears not to have been fully implemented yet.	Needs attention
1	GISCO members increase average premiums paid per tonne of cocoa.	There is an increase of responses as well as an increase in premiums payments in terms of volume (cocoa beans sourced with premiums) and total amount (USD) of premiums paid. Drawing conclusions is however difficult, given frequent changes in the monitoring questions related to premiums.	TBC
1	Increase cocoa processed or used with a LI reference price.	Volumes under LIRP payment increased but the absolute amounts remain small.	Needs attention
1	Share of cooperatives covered by multi-year agreements. Contracts or agreements containing buyer obligations.	Ca. half of the cooperatives in the direct supply chain are covered by sourcing agreements with a duration of at least 3 years. Specifications of purchase prices were the most common provisions included. Specifications of buyer obligations and mechanisms for dispute settlements were rarely mentioned.	TBC
2	Increase average yield of cocoa per hectare through improved practices.	Data remains inconsistent and difficult to interpret	Needs attention



The findings above highlight both areas of progress and several limitations. Sustained, and in some cases increased, ambition in implementing LI strategies will be necessary to achieve GISCO Goals 1 and 2.

The following recommendations focus on deepening our understanding of members' approaches and strengthening the quality, consistency and comparability of the monitoring data.

- **Better understand LI strategies**: Conduct a deep dive into the LI strategies and related activities of members. Using, among others, detailed data from the monitoring and the roadmaps as well as additional sources (e.g., lessons learned from members), we would seek to increase our understanding about (a) successful strategies to achieve a LI and (b) if and how members adapted to the revised LI strategy definition. This refers specifically to the area of 'procurement practices'.

- **Deepen knowledge of methodologies**: Prepare an extensive analysis on the methodologies and approaches used by members to collect income data as well as productivity/yield data as a basis for further recommendations/next steps.

- **Methodologies:** Continue to promote similar methodologies for collecting income data to increase robustness of data, i.e. also through joint data collection.

- **Clarity of monitoring questions:** Increase the clarity of the monitoring questions, in particular questions related to procurement practices to mitigate different ways of interpreting questions.

- **Ensure consistency:** The monitoring questions on premiums should remain sufficiently consistent over time to ensure comparability of results and enable meaningful trend analysis. A stable set of questions is important to ensure comparability and allow us to track trends reliably.

- **Task Forces:** Ensure that the results of the monitoring are picked up by the relevant Task Force to inform on their activities and proposals.

The reported volume of cocoa covered by Rainforest Alliance premiums and the corresponding total premium amounts stayed almost unchanged for the countries for which we have data compared to 2024. Members continue to employ a mix of income-related activities, rather than relying on a single approach. The available data, however, do not provide sufficient information to assess how these different approaches are combined in practice or to which extent they are implemented together. Living Income (LI) has emerged as a pivotal focus for GISCO over the past years, serving not only as a crucial mechanism for poverty reduction but also as an essential lever in addressing various sustainability challenges, such as child labour.



2.2 AGROFORESTRY

Introduction

The importance and benefits of agroforestry for cocoa have been repeatedly stressed. The CLIMCOCOA multidisciplinary research project[14], for instance, suggests that cocoa agroforestry is overall more profitable than monoculture systems, especially in the long term. Although cocoa yields in agroforestry systems tend to be lower than in monocultures in the short term, the total system yields tend to be significantly higher, contributing to food security and diversified (living) incomes. Also, cocoa agroforestry systems tend to be more resilient in the long term and often provide more stable yields than monoculture systems, particularly under conditions of climate stress. Agroforestry greatly increases carbon storage while simultaneously reducing vulnerability to extreme weather events, pests, diseases like Swollen Shoot Virus Disease (SSVD), cocoa price volatility and food insecurity, as well as boosting biodiversity and improving conditions for pollinating insects. Additionally, agroforestry systems help improve soil fertility, increase water storage in the soil, and reduce water and wind erosion.

Due to these benefits, agroforestry has been newly included into the African Standard for Sustainable Cocoa, ARS-1000[15]. This standard includes the provision that all cocoa farms undergoing rehabilitation – e.g., due to aged trees or diseases – must be established as agroforestry systems. It is currently being rolled out in Côte d'Ivoire and Ghana. While it is too early to observe any measurable effects on agroforestry, this marks an important recognition of the relevance of agroforestry for sustainable cocoa cultivation.

Within GISCO, the promotion of agroforestry is anchored within Goal 4, 'promoting the development and use of sustainable and diversified production systems, in particular agroforestry systems, which conserve natural resources as well as ending the application of hazardous and/or unauthorised pesticides'. Accordingly, several GISCO members have set goals on agroforestry on their **Roadmaps** on deforestation and agroforestry. These commitments vary significantly between members, including targets on the share of cocoa sourced from agroforestry, the support for agroforestry projects, and supplier dialogues.

The success of agroforestry programmes also depends on factors beyond the direct control of individual organisations, such as land rights, market access, income incentives and governance frameworks. Therefore, the GISCO Task Force Environment is exploring how to address such systemic challenges through political dialogue in producer countries.

Understanding the prevalence of agroforestry in supply chains is critical in the light of climate resilience and biodiversity conservation. This section presents GISCO monitoring data related to the promotion of agroforestry.

Expansion of agroforestry systems

Compared to last year, slightly less members reported on agroforestry. While 19 members provided data on the number of farmers using agroforestry in last year's monitoring, only 15 did so again this year. Reasons for non-reporting included the discontinuation of agroforestry projects by individual members but also ambiguities in the interpretation of the relevant questions. This points toward a need to further refine the indicator to improve data quality. One additional member company started a pilot project on agroforestry in 2025 and reported data for the first time. In total, 16 members reported farmer data this year – 3 less than in 2025. This included 1 retail member, 11 industry members, 3 civil society members, as well as 1 member from the German public sector.[16]

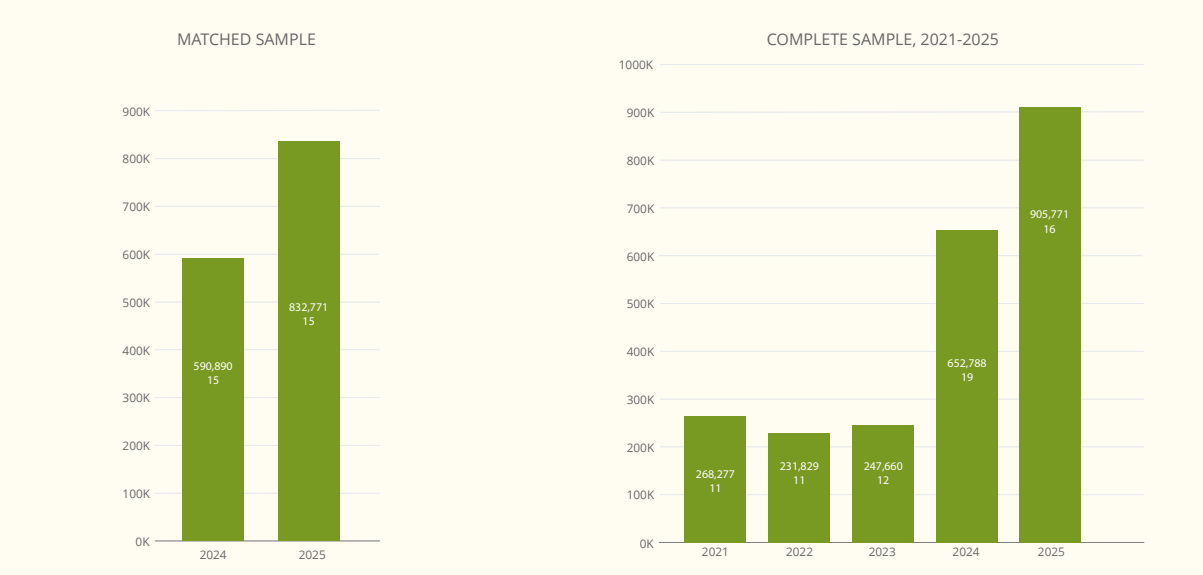
Despite this drop in reporting members, the number of farmers applying cocoa agroforestry rose substantially: from 652,788 farmers in 2024 to 905,771 farmers in 2025. Only counting members which submitted data in both years, we see an increase in farmers by about one third (see matched sample in Figure 19).

14 The CLIMCOCOA research project aimed to develop a comprehensive understanding of the impacts of climate change on the socio-biophysical bases of cocoa systems in Ghana and assess the role of agroforestry as a model for climate smart agriculture in Ghana. The research project employed a multidisciplinary approach to examine the socio-biophysical limitations and options for cocoa cultivation under climate change while assessing institutional and socioeconomic factors that favour or limit adoption by farmers of innovative management options. See: **https://forskning.ruc.dk/en/projects/climate-smart-cocoa-systems-for-ghana/**

15 ARS-1000 is a sustainability standard developed by the African Organisation for Standardisation (ARSO). It was finalised in 2021 and will be mandatory in Côte d'Ivoire and Ghana. Additional information is available in the ITC Standards Map (**https://standardsmap.org/en/factsheet/908/overview**) and a study commissioned by GISCO in 2024 (**https://www.kakaoforum.de/wp-content/uploads/2024/05/ARS_Studie_EN.pdf**).

16 Please note that the number of reporting members and the distribution between member groups differ between indicators. The numbers reported above are broadly representative for the overall picture. However, they are not indicative for the exact composition of member groups in other monitoring questions.

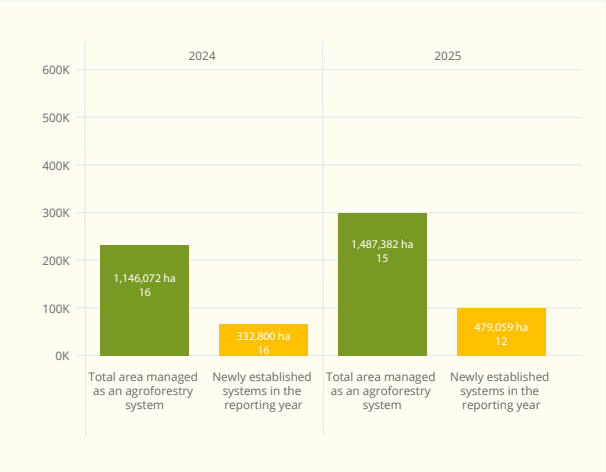
FIGURE 19: NUMBER OF FARMERS APPLYING AGROFORESTRY



This is consistent with the reported increase in the area under agroforestry, which grew from 1.14 million hectares in 2024 to 1.48 million hectares in 2025 (Figure 20). Also, members reported 479,059 ha of newly established agroforestry systems in 2025. These values denominate areas aggregated across multiple countries. Taken together, the data points toward a potential estimated expansion of approximately 30%. This indicates the continued relevance of agroforestry as a sustainability strategy.

Again, these higher values were reported by slightly less members: While 16 members shared area data in 2025, only 15 did so this year.

FIGURE 20: TOTAL NUMBER OF HECTARES MANAGED AS AGROFORESTRY SYSTEMS



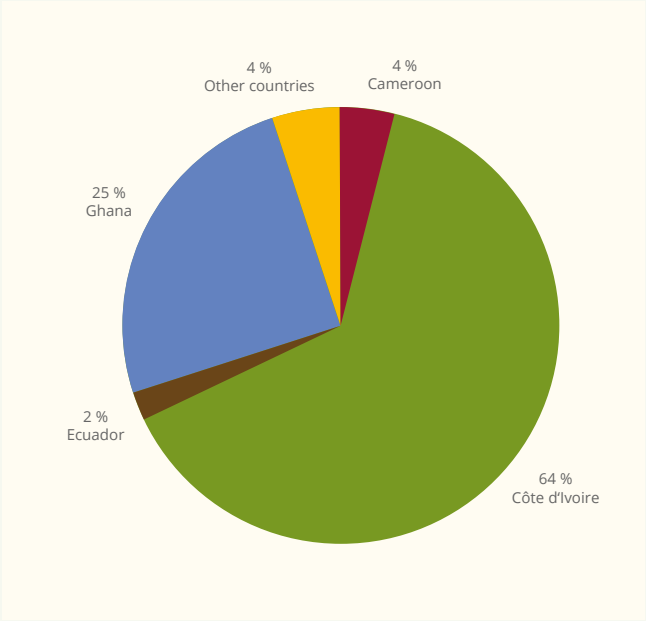
The aggregate data, however, masks substantial differences between members. The expansion – in terms of both farmers and hectares – was largely driven by a small number of companies reporting a significant growth of their agroforestry programmes. Other members reported a stagnation or even a decline of agroforestry activities. In some cases, projects which members reported on last year were concluded in 2024. While systems established under such projects may still exist, they no longer appeared in the monitoring data. Some members also reported hurdles in implementation which led to the deterioration of areas. Such hurdles included, for example, farmers leaving agroforestry programmes and low tree survival rates in some areas.



Figure 21 shows the geographical distribution of agroforestry systems reported by members. Based on the available data, nearly two thirds of the area managed as agroforestry and more than half of the farmers were reported for Côte d'Ivoire. Ghana came second with one fourth of the area and one fifth of the farmers. These two countries also accounted for the majority of newly established systems. This reflects the dominant position of Côte d'Ivoire and Ghana as sourcing countries for the reporting members rather than the prevalence of agroforestry in these countries. In Cameroon, for instance, agroforestry has traditionally dominated over monoculture. As the members reporting on this indicator sourced comparatively small volumes from this country, Cameroon still only accounts for a small share of the area under agroforestry reported here.

Agroforestry expanded in members' supply chains, but this increase is distributed highly uneven between members.

FIGURE 21: SHARE PER COUNTRY FOR TOTAL AREA MANAGED AS AGROFORESTRY IN 2025



It is not possible to make a meaningful comparison with data from 2023 or earlier, as the monitoring methodology changed in 2024. This change led to broader reporting, which is reflected in a sharp increase in the reported number of farmers.

Types of newly established agroforestry systems

As described above, members reported 479,059 hectares of newly established agroforestry systems in 2025. This marks a notable increase from 2024, when 332,800 hectares of newly established agroforestry systems were reported. This increase is largely driven by a small number of members, which report a significant expansion of their agroforestry programmes.

GISCO uses four different agroforestry levels (entry-level, basic, advanced, dynamic) to differentiate agroforestry systems according to canopy cover, tree species, native vegetation coverage, and strata. This helps to measure qualitative differences in the establishment of new systems.[17]

17 In the future, further adjustments in the GISCO categories, i.e. to align them with ARS-1000, may be important in order to move to more aligned sector approaches.



Categories for cocoa agroforestry systems

Entry level for agroforestry: At least 16 (non-cocoa) trees per hectare with a minimum of 3 different tree species, which are preferably native. This entry level for agroforestry systems corresponds to Cocoa & Forests Initiative (CFI) and World Cocoa Foundation (WCF) indicators on agroforestry.

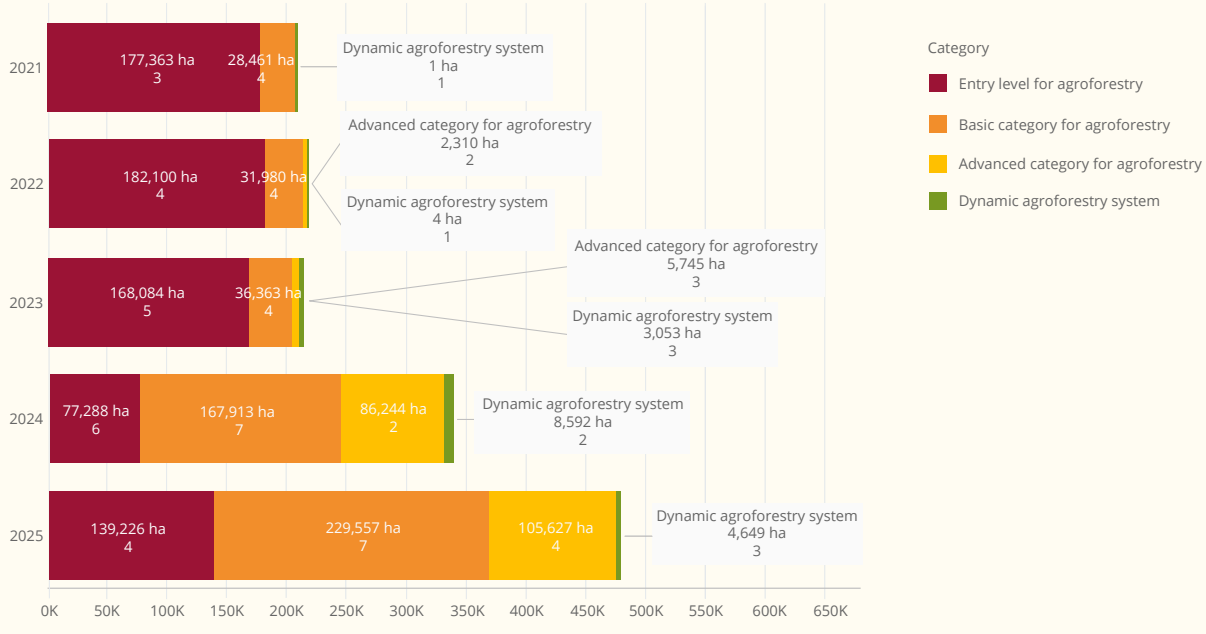
Basic category for agroforestry: At least 40% shade canopy cover with a minimum of 5 different native tree species. This category for agroforestry is in accordance with Rainforest Alliance's shade coverage and species diversity reference parameters.

Advanced category agroforestry: At least 40% shade canopy cover with a minimum of 12 different native tree species (pioneer species excluded), at least 15% native vegetation coverage, and two strata or stories. Shade species should attain a minimum of 12–15 metres in height. In this category, a special focus is given to the landscape approach on agroforestry. This category is in alignment with the recommendations of the VOICE Network.

Dynamic agroforestry systems: These systems are characterised by a very high density of trees per hectare. There is an abundance of different tree species, high biodiversity, and plant communities with different life cycles that serve different purposes (carbon sequestration, income sources, food, etc.). They grow in different stories (strata) without competition. There are at least 3 different stories (strata), regenerative practices are used, and food security and income sources outside of cocoa are guaranteed. This system mimics the natural habitat of cacao in a highly developed cultivation system.

Entry-level agroforestry systems accounted for 29% of all newly established systems. Their share has remained relatively stable since 2024 (23%) but has declined substantially since 2021 (86%). This is an important development, as it indicates that qualitative improvement has taken place along with the quantitative expansion of agroforestry systems. Still, this longer-term trend should be met with caution, given that the reporting methodology changed between 2023 and 2024 and may have not only led to wider reporting but also had meaning for the types of systems reported on.

FIGURE 22: NEWLY ESTABLISHED AGROFORESTRY SYSTEMS PER TYPE



Like last year, basic agroforestry systems represented about half of the newly established area. Their share stayed relatively stable, from 49% to 48%. In contrast, the relative importance of advanced (22% in 2025 vs. 25% in 2024) and dynamic (1% in 2025 vs. 2,5% in 2024) agroforestry systems has declined slightly since 2024. For dynamic agroforestry systems, this even translated into a decline in absolute numbers. It remains to be seen whether this indicates an emerging trend toward more basic systems or simply reflects project dynamics and reporting fluctuation.

Overall, members appear to have internalised the definitions of the agroforestry categories. Still, the data may contain inaccuracies.

1 out of 2 hectares in newly established agroforestry systems were in the basic category.

BOX 2: INDIGENOUS AMAZONIAN CHAKRAS

The Indigenous Amazonian Chakras project was implemented by WWF (Ecuador & Germany) from 2021 to 2025 in the Ecuadorian Amazon. The 'chakra' has been promoted as a production system and a central focus of sustainable farming. This is a traditional indigenous agroforestry system that combines cacao with food, medicinal, and timber, thereby fostering biodiversity and productive resilience without expanding the area of agricultural land.

1,200 producers were trained in organic farming and good agricultural practices, the management of approximately 1,200 hectares was improved, and unproductive cocoa plantations were replanted with better-adapted varieties. 2 field advisors assisted 120 producers with tree pruning, plantation renewal, and the use of organic inputs, supported by two cooperative nurseries that propagate cocoa plants to reforest the chakras.

Furthermore, improvements in cultivation were accompanied by organisational and commercial strengthening as part of a holistic strategy.

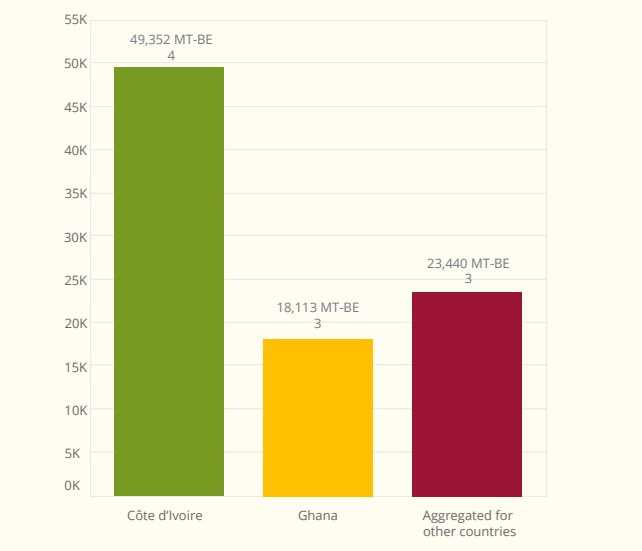
The greatest challenge remains productivity, which requires continuous technical support and monitoring. This project was funded by the Federal Ministry for Economic Cooperation and Development (BMZ) and supported by the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ).

Additional information is available here: **https://www.wwf.de/themen-projekte/projektregionen/amazonien/edelkakao-aus-agroforstsystemen**

Share of cocoa in the supply chain sourced from agroforestry systems

Data on the share of cocoa in the supply chain sourced from agroforestry systems remains sparse. In total, only 4 members reported on this indicator. All of them shared data on cocoa sourced from Côte d'Ivoire, with some reporting additionally on Ghana and/or other origins. Taken together, these members sourced 49,352 MT-BE from agroforestry systems in Côte d'Ivoire, 18,113 MT-BE from agroforestry systems in Ghana, and 23,440 MT-BE from agroforestry systems in other countries.

FIGURE 23: SHARE OF COCOA IN THE SUPPLY CHAIN SOURCED FROM COCOA AGROFORESTRY SYSTEMS





This indicates that the share of cocoa knowingly sourced from agroforestry systems remains low, namely compared to the reported number of farmers applying agroforestry (492,565 farmers in Côte d'Ivoire) and the total area managed as an agroforestry system. The 49,352 MT-BE reportedly sourced from agroforestry systems in Côte d'Ivoire represent just about 5% of the total volume sourced from this country by all GISCO trader/processor members. In Ghana, this figure stands at about 5%. Please note that these are approximate numbers as double counting of volumes still cannot be excluded.[18]

However, traceability of cocoa sourced from agroforestry regions is presumed to be limited. As many downstream members use the mass balance approach to source certified cocoa, knowledge on agroforestry in physical supply chains remains limited. Some members reported challenges to trace the occurrence of agroforestry in their supply chain. Stricter traceability requirements mandated by EUDR might make it easier going forward to trace agroforestry plots and share data through the supply chain. Whether this translates into improved data quality remains to be seen.

This means that the actual share of cocoa from agroforestry systems is likely higher than indicated by the collected data. A 2025 study[19] by ETH Zurich, CIAT and Cambridge estimates that 5.6% of cocoa from Côte d'Ivoire and Ghana is grown under a shade cover of at least 30%. This roughly corresponds to the 'basic level' used in GISCO monitoring.

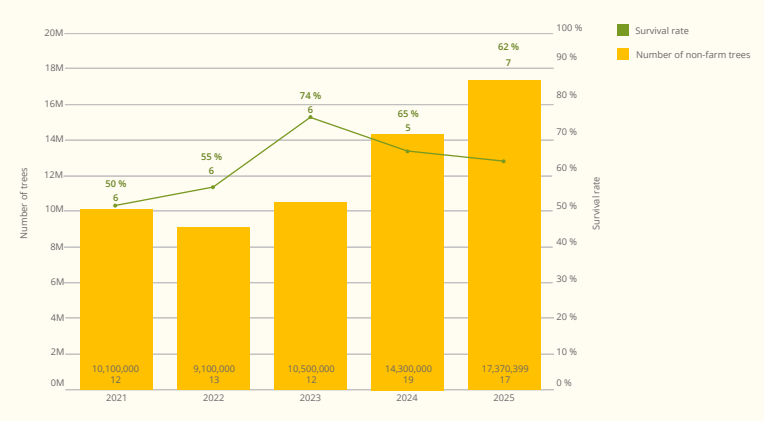
However, even under the assumption that the actual share is higher than reported these numbers indicate that there is significant room for an expansion of agroforestry in members' value chains.

The reported share of cocoa sourced from agroforestry remained low.

Distribution of trees

Tree distribution reached 17.4 million in 2025, rising from 14.3 million last year. This is despite of a slight decrease in the number of reporting members. The increase in the number of trees is broadly consistent with the reported expansion of agroforestry. As the need for seedlings may differ according to factors like project cycles, types of agroforestry systems, survival rates, and propagation methods, a proportional relation between trees and areas cannot be expected. Also, not all members reporting on the number of trees also reported on farmers or hectares, further limiting the comparability of the data.

FIGURE 24: DISTRIBUTION OF ON-FARM TREES IN THE CONTEXT OF AGROFORESTRY PROMOTION AND SURVIVAL RATE AFTER TWO YEARS



18 To minimise double counting, total sourced volume is calculated using only the reported volumes of GISCO members that are traders. This is an estimate of volumes sourced by all members as most volumes are initially sourced by these traders. In contrast, volumes sourced from agroforestry systems are based on reporting from all GISCO members because the non-traders reporting on this indicator appear to refer to volumes sourced from their own sustainability programmes. While this calculation method reduces risks of double counting, it still only produces a rough estimate of the overall share sourced from agroforestry.

19 See here: **https://arxiv.org/pdf/2410.20882**



The reported two-year survival rate improved from 50% in 2021 to 62% in 2025, after a level of 74% in 2023. Higher tree survival rates can be supported by approaches such as targeted planting support, improved post-distribution follow-up, clear tree ownership arrangements for farmers, and closer collaboration with local communities and authorities. As in previous years, only a few members reported on the survival rate. This points toward a need to improve the monitoring and evaluation of agroforestry programmes.

Approaches to promoting agroforestry differ. While the distribution of seedlings remains the dominant strategy, some actors increasingly rely on the natural propagation of shade trees. Among other advantages, initial research[20] has suggested a higher survival rate, better growth, and greater genetic diversity of spontaneous trees compared to distributed seedlings. This approach may have implications on the informative value of the monitoring data on seedling distribution – a trend which should be monitored over the next few years.

BOX 3: EL CACAO

On its company-owned cocoa farm EL CACAO in Nicaragua, Ritter has been cultivating its own cocoa since 2012. Of the farm's total area of 2,500 hectares, 1,200 hectares have been reforested with cocoa trees propagated in-house, established as a mixed-species agroforestry system.

In addition to cocoa, an average of 30 shade trees per hectare were planted. Today, more than 1 million cocoa trees and over 30,000 shade trees stand on El Cacao. The remaining area consists of rainforest, whose preservation is a high priority.

Through mixed-species reforestation and targeted liming, soils previously degraded by grazing have been structurally improved.

Active soil biology, together with high biodiversity of fauna and flora, now contributes to a resilient production system.

The farm is managed according to the principles of integrated agriculture. Appropriate mechanisation and a well-qualified workforce are further key prerequisites for producing high-quality cocoa and achieving high productivity. Ritter systematically applies the insights gained from its own cultivation to integrate and disseminate them across its other cocoa programmes in additional sourcing countries.

One of the main learning includes: To ensure the long-term functioning of the production system, the maintenance requirements for shade trees – particularly pruning to adapt shading to local needs – must not be underestimated.

Conclusions and recommendations

The data confirm the continued relevance of agroforestry for several GISCO members and point to progress in new system establishment and tree survival. At the same time, huge discrepancies between individual members remain, with collective progress largely due to the efforts of a small number of members. Also, the one-digit share of cocoa volumes knowingly sourced from agroforestry systems suggests room for improvement in terms of scaling successful projects. Continued improvement in traceability and data quality will help GISCO track progress more clearly over time.

The following recommendations are aimed at supporting the achievement of GISCO Goal 4, based on the insights and data presented in this report:

20 See here: **https://www.sciencedirect.com/science/article/pii/S2666719323000183**. Also compare: **https://link.springer.com/article/10.1007/s10457-025-01180-1**



GOAL	INDICATOR	STATUS
4	By the end of 2025, 30 % of the total area under cocoa cultivation will be managed as agroforestry systems.	Cannot be calculated as data on total area under cocoa cultivation is not available.
4	From 2026: GISCO members increase the area under cocoa cultivation managed as agroforestry.	Stable progress

- **Scale:** The aggregated data suggest that members keep investing in agroforestry programmes, achieving positive results in terms of area covered. Projects could be further scaled to accelerate progress.
- **Effectiveness:** While the total area under agroforestry increased in 2025, several members reported a discontinuation of agroforestry programmes or a deterioration of performance for single locations. Members could engage in peer-to-peer exchange to improve the effectiveness and long-term sustainability of agroforestry projects. In addition, members could continue or scale up joint action on factors beyond the direct control of individual members through measures like political dialogue.
- **Traceability of agroforestry data:** Data on the share of cocoa from agroforestry in members' supply chains is highly limited. To improve knowledge on the relevance of agroforestry in supply chains, alignment on data collection and data transfer along the supply chain could be improved.
- **Data quality:** Monitoring questions were not always interpreted consistently between different organisations or persons within the same organisation. This led to inconsistent data. The Task Force could explore ways to improve alignment on definitions and methodologies.
- **Monitoring questions:** In the interests of coherence, emerging monitoring initiatives on agroforestry (e.g., related to ARS-1000) should be observed. Opportunities for dialogue and potentially alignment could be explored. In addition, trends toward natural propagation of shade trees could be monitored for their potential implication on the data and monitoring questions (i.e., question on seedling distribution less informative).



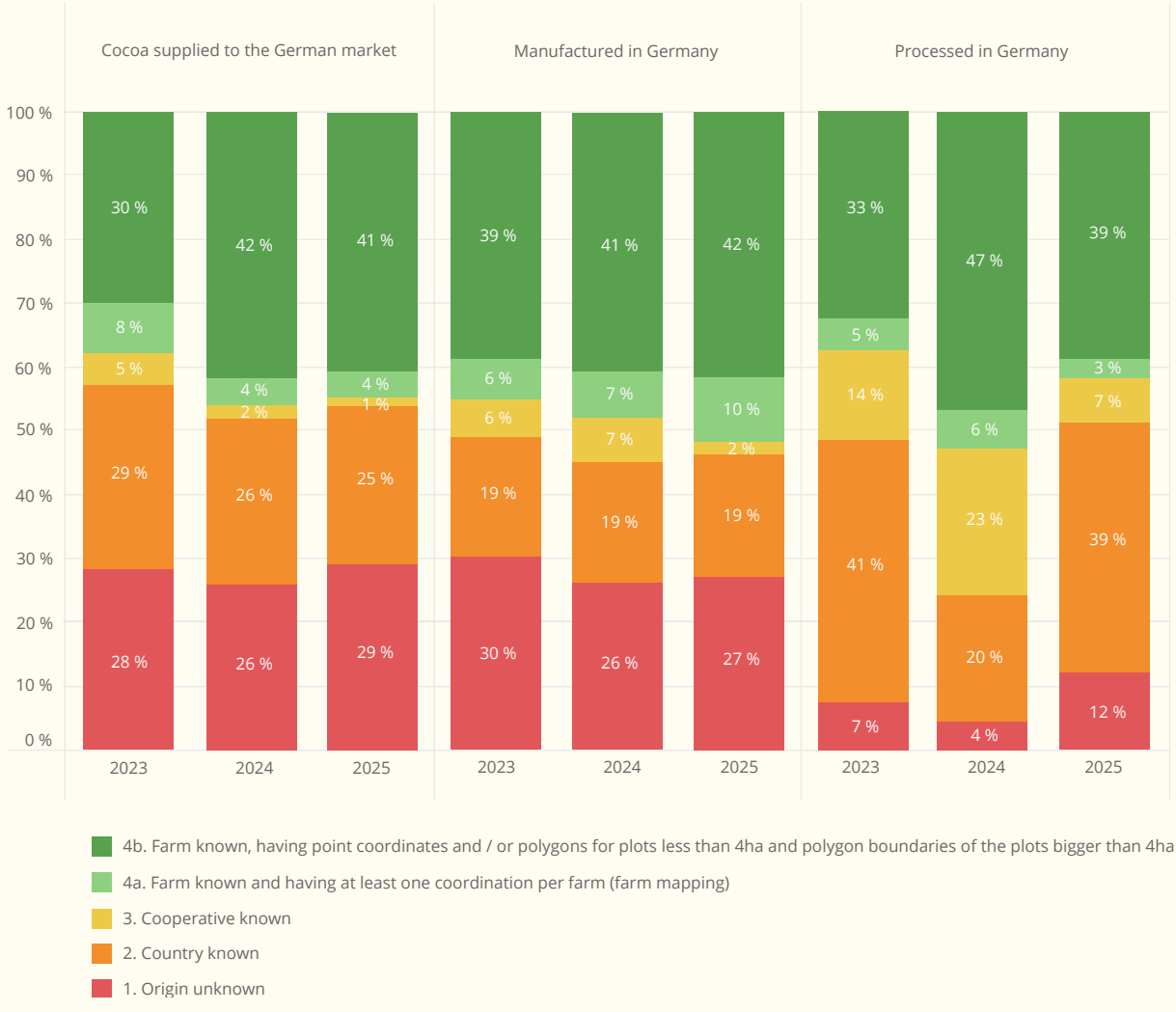
III.
ANNEX

OTHER MONITORING TOPICS[21]

This section introduces monitoring data that falls outside the scope of the focus topics of this year's report. The data is accompanied by brief description and not subjected to further analysis.

3.1 TRANSPARENCY AND TRACEABILITY

FIGURE 25: TRACEABILITY LEVELS OF COCOA SOLD, MANUFACTURED OR PROCESSED IN GERMANY (PRELIMINARY)[22]



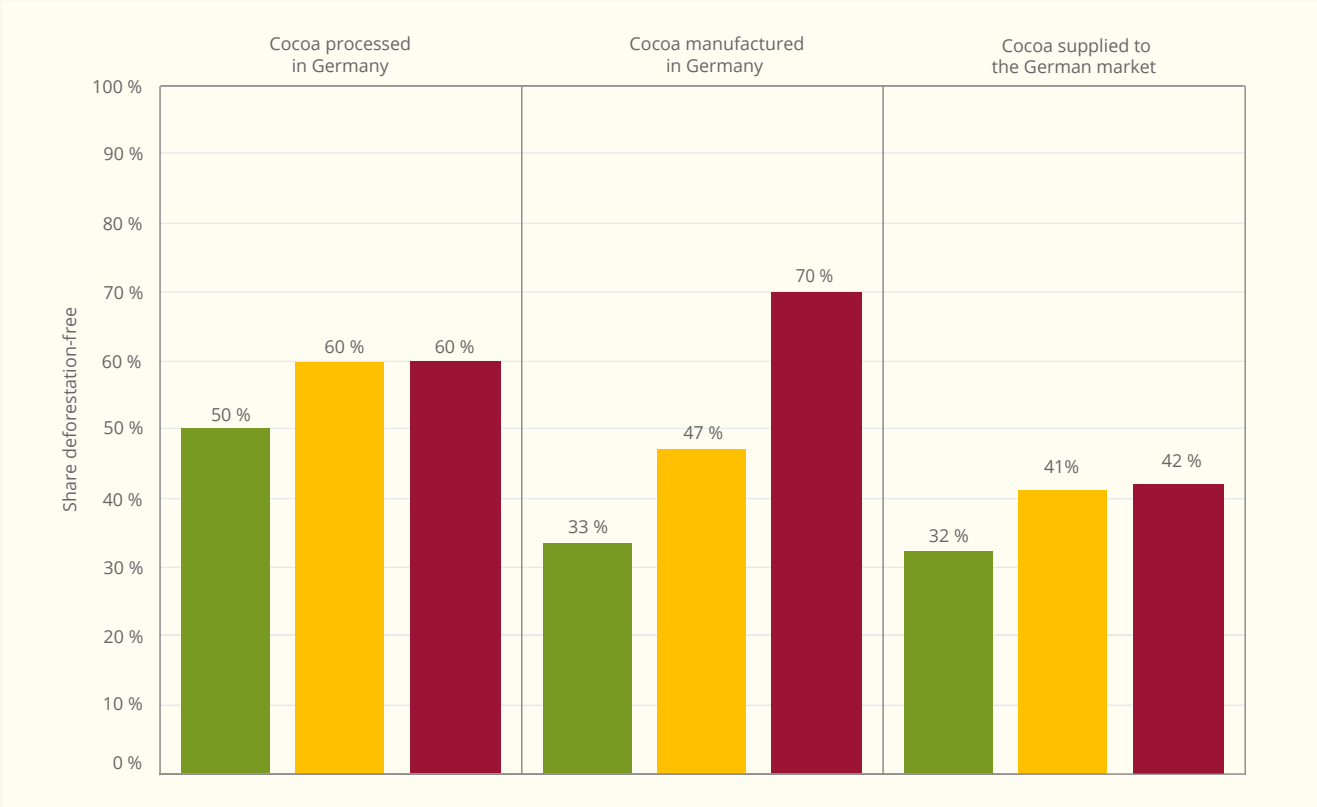
21 Due to reporting challenges, the aggregated volumes of cocoa sourced under the GISCO monitoring are not presented here. However, volume data have been used to calculate weighted averages for specific indicators, such as traceability and deforestation-free cocoa. In consultation with the relevant members, 2024 data was used as a weighting factor whenever the reported 2025 volume data could not be reported in an accurate manner.

22 Members report traceability-level data for their global sourcing volumes. The weighted average share is subsequently calculated by weighting each member's reported traceability level according to the volume it supplies to the German market, manufactures in Germany, and/or processes in Germany.

3.2 ENVIRONMENT

Deforestation-free cocoa[23]

FIGURE 26: SHARE OF DEFORESTATION-FREE COCOA SOLD, MANUFACTURED OR PROCESSED IN GERMANY



Forest protection, forest restoration and integrated pest management

TABLE 3: OVERVIEW OF FOREST PROTECTION, FOREST RESTORATION AND INTEGRATED PEST MANAGEMENT

INDICATORS	2021	2022	2023	2024	2025
Number of hectares of off-farm forest restored	4,336 3	2,357 6	20,294 5	801 7	1,173 5
Number of off-farm trees planted	1.2 million 5	1.4 million 5	718,811 5	762,497 8	517,137 5
Number of trees planted that classify as native	50% 2	55% 4	74% 3	68% 4	61% 5
Number of hectares benefitting from forest protection	962,308 5	3 million 5	1,8 million 5	82,998 5	124,811 5
Number of farming households that applied integrated pest management	449,103 10	339,861 11	425,064 9	213,745 7	113,436 6

23 Having polygons of the farm (> 4 ha) and farm plots (< 4 ha) verified as not in a protected forest nor comprising land that was deforested since 31.12.2018 for GISCO and 31.12.2020 for the other ISCOs. The presented data on deforestation-free cocoa does not distinguish between different cut-off dates.



Pesticide policy

TABLE 4: PESTICIDE POLICY

INDICATORS	2024		2025	
	YES	NO	YES	NO
Does the company/organisation have a sustainability policy that also includes pesticides for the cocoa that the company/organisation sources?	19	12	19	12
Does this policy include pesticide reduction targets and or the phasing out of HHPs?	15	4	19	0
Does your company/organisation use an existing list of active substances that are prohibited and/or restricted from your company's supply chain?	14	1	14	2
- Fairtrade and Rainforest Alliance list	5		2	
- Rainforest Alliance list	3		2	
- Fairtrade list, Rainforest Alliance list and Organic list	2		3	
- Organic and Rainforest Alliance list	1		0	
- EU pesticide database/National lists of approved pesticides	1		1	
- Own company list	0		1	
- Fairtrade list, Rainforest Alliance list and own company list	0		4	
- Rainforest Alliance list and own company list	0		1	
Does your company/organisation monitor the use of the listed active substances in its supply chain?	8	6	10	4
- Using Fairtrade, Rainforest Alliance or Naturland fair certification scheme	5		7	
- Having own company monitoring system	2		2	
- Cooperation with NGO	1		1	

3.3 CHILD LABOUR

FIGURE 27: NUMBER OF HOUSEHOLDS COVERED BY CLMRS

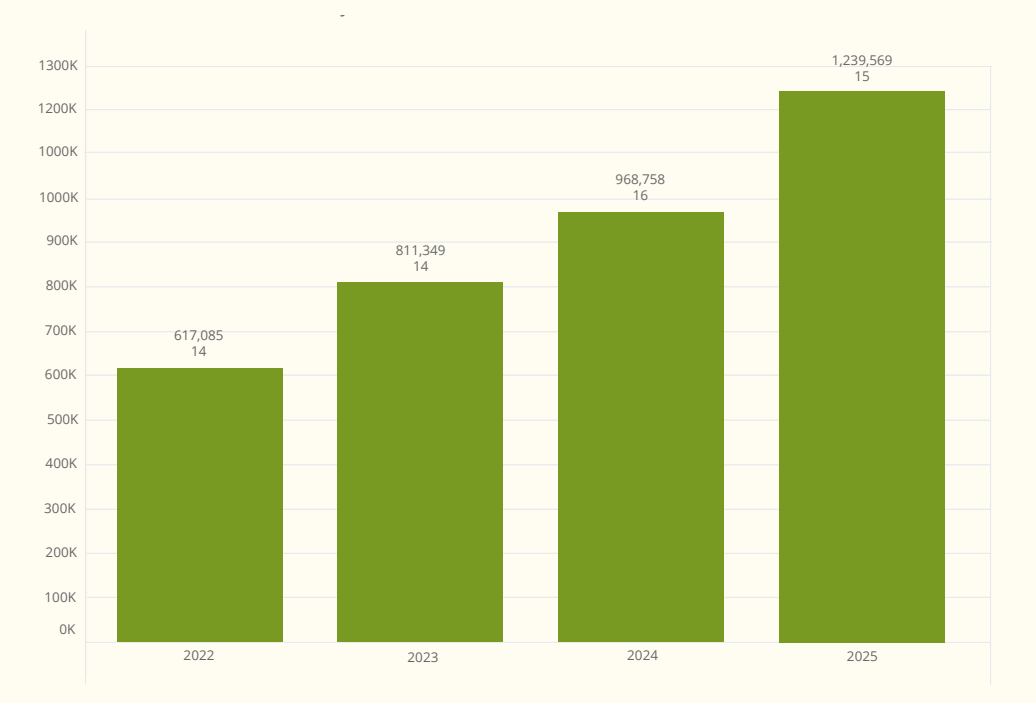


FIGURE 28: NUMBER OF CASES OF CHILD LABOUR IDENTIFIED AMONG NUMBER OF CHILDREN COVERED BY CLMRS



3.4 FORCED LABOUR

FIGURE 29: IMPLEMENTATION OF MEASURES TO PREVENT AND ADDRESS FORCED LABOUR RISKS

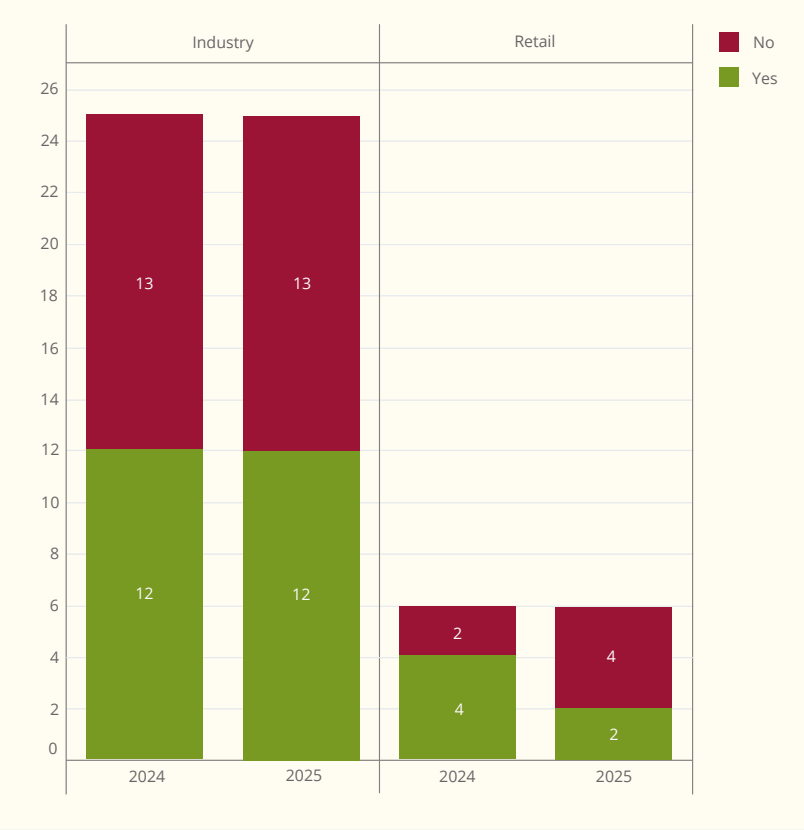


TABLE 5: FORCED LABOUR INDICATORS

FORCED LABOUR INDICATORS	2024		2025	
	TOTAL	NUMBER OF MEMBERS REPORTING	TOTAL	NUMBER OF MEMBERS REPORTING
Number of households covered by an assessment of forced labour risks in the past 12 months	125,474	4	193,300	3
Number of households reached by awareness raising on forced labour in the past 12 months	288,258	9	342,102	6
Number of households that have access to a grievance mechanism to report forced labour risks and cases	168,367	5	238,513	4
Number of grievances reported in the past 12 months	4,053	6	95	5
Number of cooperatives that have a forced labour policy in place	256	5	733	6



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