



JOINT ISCO MONITORING BRIEF 2022

1st joint monitoring brief of the National Initiatives on Sustainable Cocoa in Europe (ISCOs)



**Beyond
Chocolate**



DISCO
DUTCH INITIATIVE ON
SUSTAINABLE COCOA



Forum Nachhaltiger Kakao
German Initiative on Sustainable Cocoa



**Swiss Platform for
Sustainable Cocoa**

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Box 1

NATIONAL INITIATIVES ON SUSTAINABLE COCOA IN EUROPE (ISCOS)

The ISCOs represent five National Initiatives on Sustainable Cocoa in Europe: Beyond Chocolate from Belgium, the Dutch Initiative on Sustainable Cocoa (DISCO), the French Initiative on Sustainable Cocoa (FRISCO), the German Initiative on Sustainable Cocoa (GISCO) and the Swiss Platform for Sustainable Cocoa (SWISSCO). Through their collaboration, the ISCOs bundle efforts to jointly address key issues in the cocoa sector. In a [Memorandum of Understanding \(MoU\)](#), the ISCOs have identified four common challenges of the sector and documented the objectives of their collaboration towards a more sustainable cocoa sector.

The 4 common challenges of the ISCOs

- Enhance the transparency in the cocoa value chain;
- Contribute to a living income for cocoa farmers and their families;
- Halt cocoa-related deforestation and promote sustainable reforestation and biodiversity;
- End child labour and forced labour in the cocoa value chain.

1. Background and objectives

This is the first joint monitoring brief of the National Initiatives on Sustainable Cocoa in Europe (ISCOs). Publishing a joint brief is a move towards enhancing the ISCO's cooperation through progress reporting and strengthening accountability. The document consolidates the monitoring data from Beyond Chocolate, DISCO, GISCO, and SWISSCO. It focuses on their harmonised data-points related to the four common challenges as identified in the ISCO MoU: traceability & transparency, living income, forests & agroforestry, and child labour.

The joint ISCO monitoring brief aims to:

- communicate developments in the cocoa sector for the markets covered by the ISCOs, expanding the scope beyond national perspectives and offering a more comprehensive European viewpoint.
- provide our partners, members, signatories, policymakers, and stakeholders a basis for developing/adjusting their approaches to fostering sustainable cocoa.
- help policymakers gain a better understanding of sectoral trends within the cocoa industry in the markets covered by the ISCOs.
- provide an update to our members and signatories on ISCO harmonisation with respect to monitoring and offer insights to facilitate the advancement of the ISCO collaboration in this area.

Since 2019, the ISCOs have worked together to develop a joint monitoring system as outlined in the ISCO MoU. Among the main accomplishments since then, the ISCOs have collectively designed a shared monitoring tool, expanded the scope of harmonised data points, and welcomed new ISCOs into the monitoring collaboration. For the reporting year 2022, Beyond Chocolate, DISCO, and GISCO collaboratively utilised the joint reporting tool. SWISSCO used the tool for the first time on a trial basis. FRISCO used some of the harmonised data points for its Excel-based survey, but their data is not yet included in this report (see Box 2).

Box 2

FRISCO'S PARTICIPATION IN THE ISCO MONITORING PROCESS

FRISCO carried out its first test reporting in 2023, based on a selection of harmonized indicators from the ISCOs. FRISCO members recognise the importance of a Europe-wide collaboration of ISCOs and associated reporting to ensure progress on common issues. Discussions are thus underway about FRISCO's ability to take part in common reporting in 2024.

The report presents the joint data on the four challenge areas before outlining potential pathways for advancing the ISCO monitoring collaboration in the final chapter.

2. Methodology

The core data points that form the basis for this monitoring brief are related to four shared challenge areas: traceability & transparency, living income, forests & agroforestry, and child labour. Beyond Chocolate, DISCO, FRISCO, GISCO, and SWISSCO worked together in 2022 to align these data points. The national monitoring reports produced by the individual ISCOs (published before the joint report) include in some cases additional monitoring data points that are nationally relevant. For the questions on child labour, the ISCOs harmonised their reporting questions with the International Cocoa Initiative (ICI) and an option to transfer data from ICI to the ISCOs was provided for those members that are members of both ICI and an ISCO.

Members of Beyond Chocolate, DISCO, GISCO, and SWISSCO reported their data for the 2022 reporting period in April 2023, using the joint online ISCO monitoring tool. SWISSCO participated on a trial basis, with about 20 % of members participating in the reporting. For Beyond Chocolate, DISCO and GISCO, participating in the reporting is mandatory. Organisations that are members of several ISCOs only had to report once.

In the months after data collection, the ISCOs reviewed and cleaned the submitted data. The ISCO secretariats met in July 2023 to jointly analyse the consolidated ISCO data. During this session, the preliminary findings were discussed and next steps determined. Subsequently, the ISCO Working Group Monitoring had the opportunity to comment on the draft findings before the final review by the ISCO Boards and Steering Committees.

Overall, the data from 72 members and signatories is included in the analysis. However, the specific data points members were asked to report on differed slightly per stakeholder group and per ISCO. Details on the response rates are included in each of the thematic sections below.



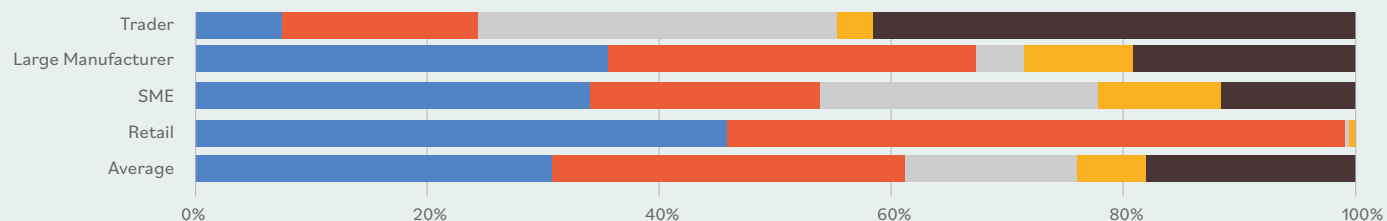
3. Findings

3.1 Traceability & transparency

Traceability and transparency are pre-conditions for achieving sustainability. Understanding the origin of the cocoa sourced and processed by ISCO members is a crucial step in comprehending and effectively addressing existing sustainability challenges. The data points that the ISCOs collected under the ‘traceability and transparency’ pillar relate to the traceability levels of sourced cocoa and the percentage of certified and independently verified cocoa.

Regarding traceability levels (Figure 1), current data indicates a lack of information about the origin being transmitted from traders to retailers and manufacturers. Traders possess greater knowledge about the source of their cocoa, with approximately 45 % having farm-specific information such as point or polygon coordinates; just 7.5 % lack origin details. In contrast, retailers lack information about the cocoa’s origin, with ca. 46 % of cocoa described as “origin unknown” and less than 1 % having farm-specific information available. Both small and large manufacturers fall somewhere in between, showing comparable scores for both “origin unknown” and “farm known” categories.

Figure 1: Traceability Levels



	Average	Retail	SME	Large Manufacturer	Trader
■ 1. Origin unknown	30.7%	45.8%	34.0%	35.5%	7.4%
■ 2. Country known	30.4%	53.2%	19.8%	31.8%	16.9%
■ 3. Cooperative known	14.9%	0.4%	24.0%	4.1%	31.0%
■ 4a. Known farm, with at least one coordination per farm (farm mapping)	5.9%	0.6%	10.6%	9.4%	3.1%
■ 4b. Farm known, having point coordinates and /or polygons for plots less than 4ha and polygon boundaries of the plots bigger than 4ha	18.1%	0.0%	11.6%	19.2%	41.6%

In the coming years, as the EU Deforestation Regulation (EUDR) is implemented (see also the forthcoming chapter on deforestation), we can anticipate a rise in the sharing of traceability data throughout the supply chains, extending to retailers and manufacturers. Notably, traders have already indicated that they possess polygon data for 50 % of the cocoa, signaling the sector’s initial steps towards enhanced traceability. Nevertheless, there remains significant work to be done in terms of expanding origin knowledge and facilitating the transfer of this information along the value chain.

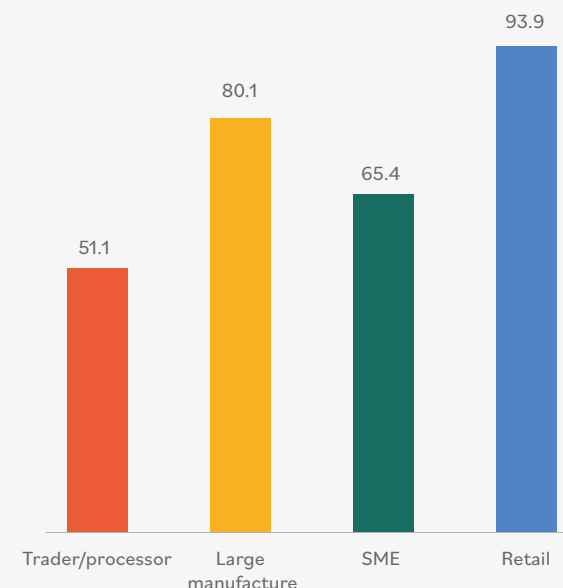
Participation

Asked to report on traceability: 69¹
 Number of members and signatories that responded: 69

When considering the proportion of certified and independently verified cocoa² (Figure 2), traders stand out as holding a lower share of such cocoa as compared to large and small manufacturers and retailers. While traders report a share just above 50 %, all other groups report a higher share, ranging from 65 % (for SMEs) to over 90 % (for retailers).³

The disparity in certification and company scheme adoption among manufacturers, retailers, and traders may suggest that traders distribute a larger portion of uncertified or non-independently verified cocoa to markets not under the purview of the ISCOs. While recognising that current approaches are not sufficient to deliver on the long-term objective of enabling living incomes for cocoa farmers, certification and/or coverage by an independently verified corporate sustainability scheme can be a first step.

Figure 2: **Average share of cocoa in supply chain that is certified and/or independently verified**



Participation

Asked to report on share of certified/independently verified cocoa⁴: 62
 Number of members/signatories that responded: 62

¹ DISCO retailers and small manufacturers were not expected to report on traceability.

² For the joint ISCO data on company schemes and combinations, all company schemes reported by members were included in the aggregated figures.

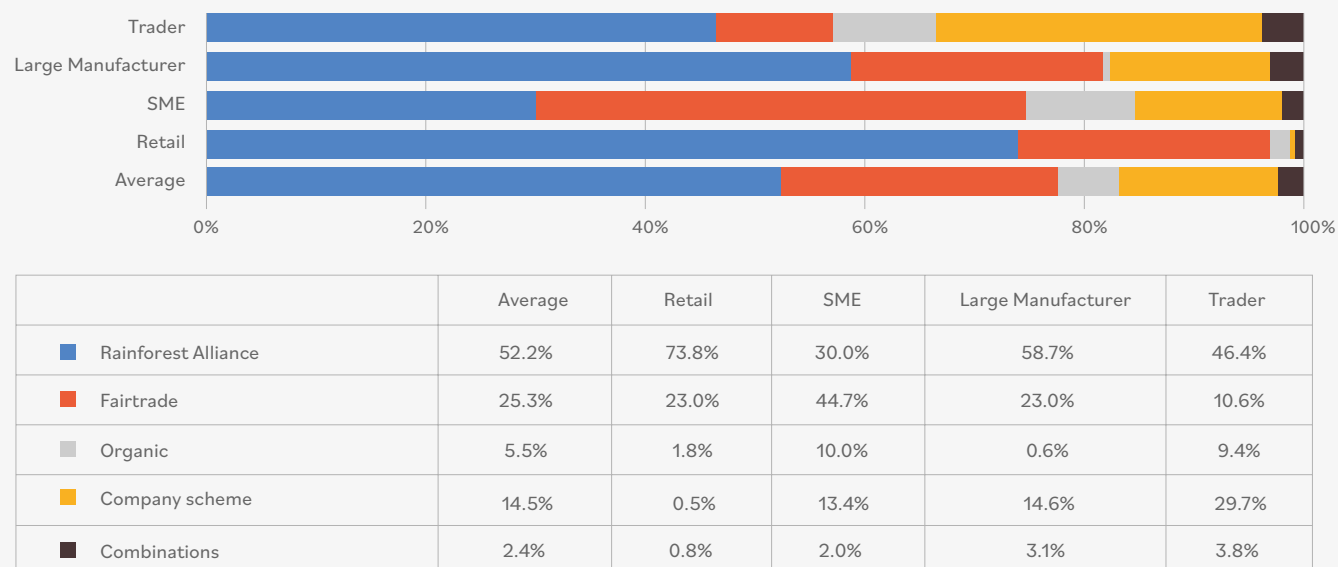
³ We differentiate between all traders, all retailers, and large and SME manufacturers, according to EU definition of SMEs. We do not differentiate between large and small traders/retailers.

⁴ SWISSCO members were not asked to respond to the question on certification.

When analysing the data on certified/independently verified cocoa, it is important to keep three critical points in mind:

1. Members reported differently on the share of certified/independently verified cocoa. While some related the share to their globally-sourced volumes, others (in particular those who are members in only one ISCO) provided the share of certified/independently verified cocoa as it relates to the national market. For the next monitoring round, the ISCOs will develop further clarification on this point.
2. Currently there is no aligned ISCO-wide definition as to which programmes are included in the ‘independently verified cocoa’ category. A more aligned understanding is expected to be developed in the coming months.
3. The figures presented are not related to the volume so do not represent weighted averages.

Figure 3: Average share per type of certified or independently verified cocoa



When examining the prevalence of various certification and verification schemes, similar to what is observed in the national ISCO data, Rainforest Alliance-certified cocoa emerges as the most common type of certified cocoa. Fairtrade, the second most important certification/independent verification type, is particularly relevant among SMEs. Company schemes are mostly relevant for traders and are of very limited importance for retailers (less than 1%). Organic is overall less prevalent (5.5% on average) and is most common among traders and SMEs (ca. 10%).

Combinations of different certification and/or company schemes are still relatively rare (less than 2.5%) but there is some indication from national reports that combinations and company schemes are increasing in relevance.

Participation
 Asked to report on type of certification/independently verified: 62
 Number of members/signatories who responded: 62

3.2 Deforestation

All ISCO members have committed to halting cocoa-related deforestation. The EU Deforestation Regulation (EUDR) which will become applicable from 30 December 2024 supports this transition. The regulation requires that all cocoa and chocolate imported into or traded in the EU or exported from the EU to have “polygons of the farm (> 4 ha) and farm plots (< 4 ha) verified as not in a protected forest and as not comprising land that was deforested after December 31, 2020.” The 2022 data show that on average, ISCO members can currently claim about one-quarter of their volumes as deforestation-free in line with this definition. This does not mean that all other volumes are necessarily linked to deforestation,

but that members currently do not have the guarantees in place to make deforestation-free claims. Members were asked to self-assess the extent to which they have implemented environmental risk management and/or due diligence approaches in their supply chain, ranging from “not started yet” to “fully implemented.” The graph shown in Figure 5 presents the share of deforestation-free cocoa in correlation to the level of implementation of environmental risk assessments and/or due diligence approaches. The more advanced members are in the implementation of environmental risk assessments, the higher the share of volumes they can claim as deforestation-free. For instance, members that have reported having fully implemented environmental-risk management and due diligence approaches have sourced 75 %

of their cocoa as deforestation-free cocoa on average. It should also be noted that there is not yet full clarity from the EU Commission on the information and benchmarking of risk countries that can be used, making it difficult for partners to prove their deforestation-free claims. As the EU Commission provides more clarity on these elements, the reporting on this indicator could change considerably next year.

Participation

Asked to report on deforestation-free volumes N: 50
Number of members/signatories that responded on deforestation-free volumes N: 44

Figure 4: Share of volumes that can be claimed as deforestation-free

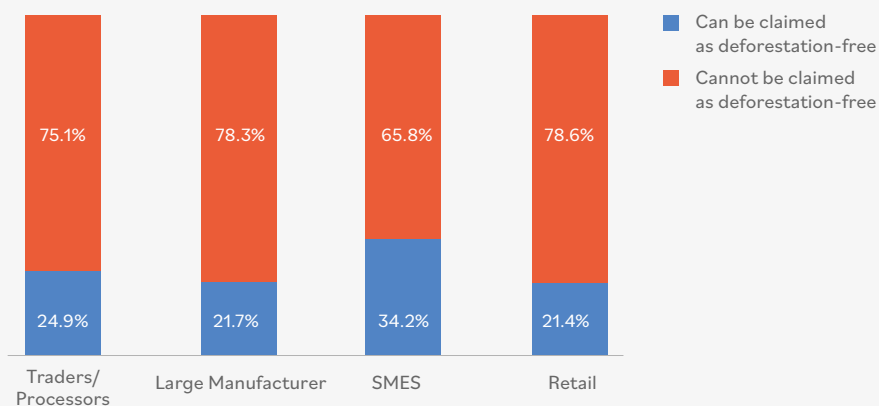
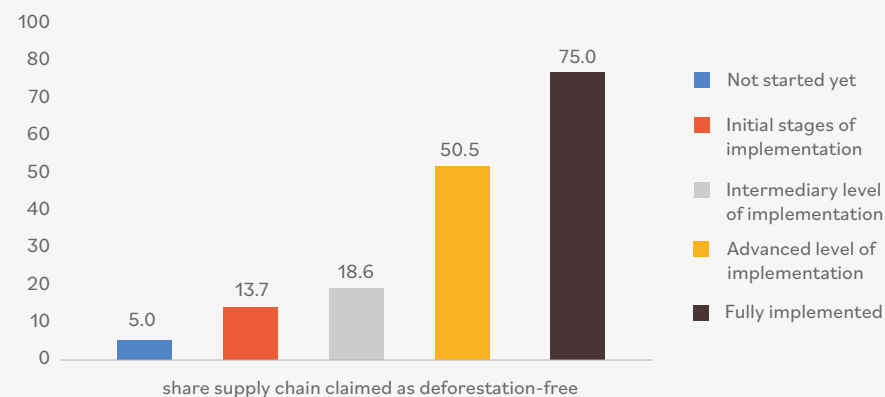
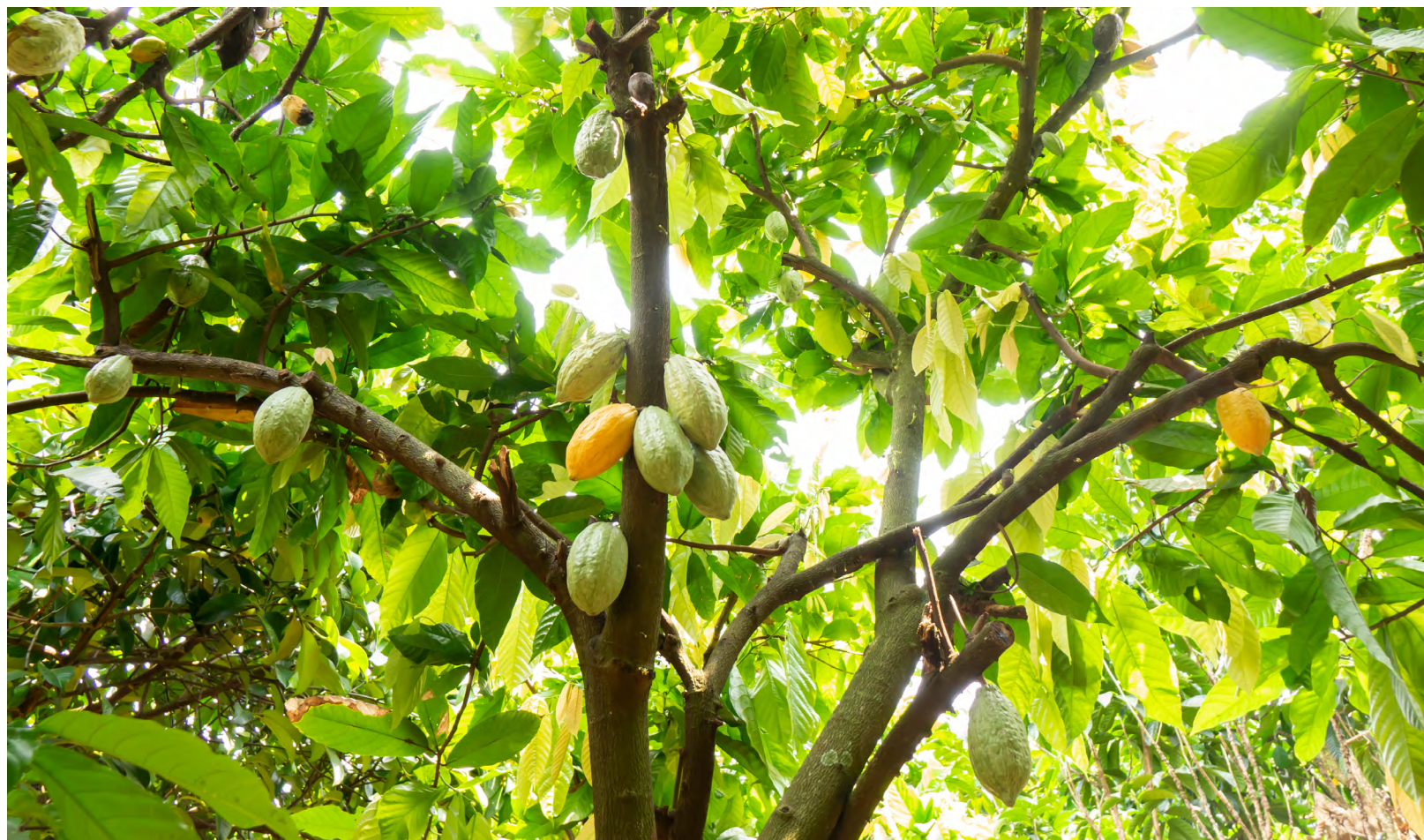


Figure 5: Implementation of environmental risk management and average share of deforestation-free cocoa



While the market is starting to move towards more traceable and deforestation-free cocoa, impact on the field remains limited. Data from the [World Resource Institute](#) reveal tropical primary forest loss increased by 71 % in 2022⁵. Ghana even experienced the largest per cent increase in primary forest

loss in recent years. In 2022, the country lost 18,000 ha, partially linked to cocoa production. Poverty is assumed to be a major driver of deforestation; it compels the further linking of biodiversity interventions with those aimed at increasing farmer incomes.



⁵ The increase of primary forest loss as of 2022 was determined by comparing the average primary forest loss from 2015-17 to the average from 2020-22

3.3 Living income

To enable farmers to earn a living income, it is important for organisations to make potential living income gaps visible through measurements in their supply chain. In case gaps have been determined, it is essential for ISCO members and signatories to implement living income strategies targeting multiple drivers (e.g., land size, yield, price, cost of production, diversified incomes), to arrive at a smart mix of strategies. The ISCO reporting results below will provide insights into the measurement of living income gaps, the implementation of living income strategies as well as initial insights into the closure of gaps by ISCO members/signatories.

The ISCO members and signatories reported that for a total of 16,798 households, a living income gap was measured as part of a sample. The majority of the households included in the living income measurement studies were located in Côte d'Ivoire (5,176 households), compared to 1,983 households in Ghana. Over 9,639 households were included in living income measurement studies for different countries and bundled as 'other countries.' Considering the results above, a relatively small number of signatories/members seems to have reported measuring living income gaps in their supply chain, which translates to an overall low number of households for which living income gaps were measured. It is important to note, however, that some organisations mentioned their living income gap studies are not done on an annual basis which could therefore have an impact on the current results and those of upcoming years.

Enabling farmers to earn a living income requires organisations to develop and implement living income strategies tackling the different income drivers. ISCO members and signatories reported that for 246,349 households in Côte d'Ivoire, Ghana and "other countries," a living income strategy was implemented.

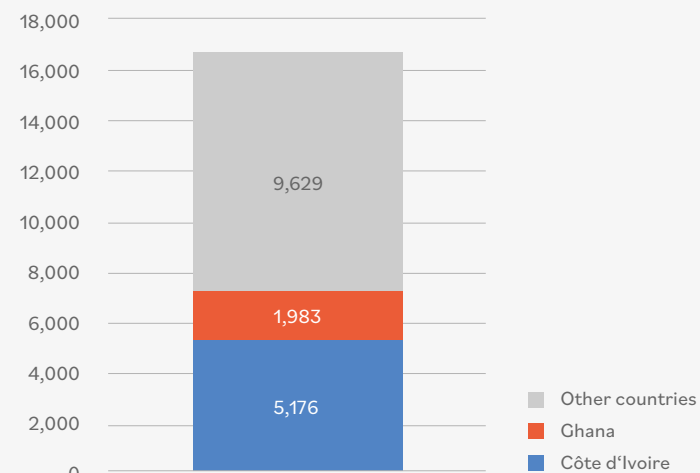
Participation

Asked to report on LI indicators N=43

Number of signatories who reported on measuring the living income gap in their supply chain:

- Côte d'Ivoire: 8
- Ghana: 6
- Other countries: 10

Figure 6: Number of households for which a living income gap was measured



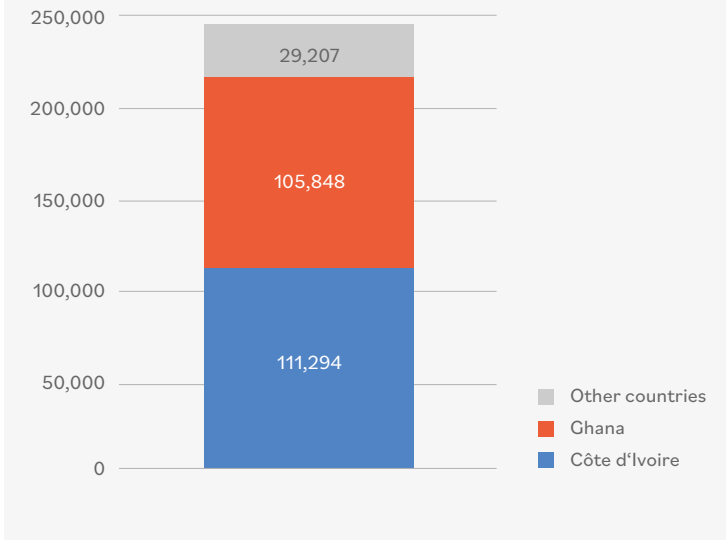


The number of households for which a living income strategy is implemented seems evenly distributed over Côte d'Ivoire and Ghana, with a smaller proportion (29,207 households) being covered in "other countries".

ISCO members and signatories reported having closed the gap for 33,764 farmers in their supply chain. In Côte d'Ivoire, approximately 12,614 farmers closed their living income gap in 2022, while in Ghana 13,989 farmers did, compared to 7,161 farmers in "other countries".

Looking at the results above, about 14 % of the households covered by a living income strategy closed the living income gap during the reporting year. Although it might be tempting to compare the number of households covered by a living income strategy and the number of farmers closing the living income gap, it is difficult to determine the effectiveness of implemented living income strategies, as several (external) factors can have an impact on the living income gap closure by farming households. Indeed, the impact of a living income strategy might not show directly and will gradually improve income over time. Additionally, looking at 2022, the high inflation rates and soaring cost of production will have had an impact on the number of households reaching the living income benchmark level.

Figure 7: Number of households for which a living income strategy was implemented



Participation

Asked to report on LI indicators N= 43

Number of signatories/members who implemented a living income strategy:

- Côte d'Ivoire: 10
- Ghana: 7
- Other countries: 6

“A Living Income Reference Price (LIRP) indicates the price needed for an average farmer household with a viable farm size and an adequate productivity level to make a living income from the sales of their crop.” – Fairtrade Living income Reference Prices for Cocoa (2019)⁶.

Paying a LIRP can be seen as a means to increase farmer income and increase farmers’ resilience. Data reveals that a Fairtrade LIRP has been paid for about 46,662 MT of cocoa bean equivalent. The vast majority of the volumes for which a LIRP was paid originate in Côte d’Ivoire (44,204 MT) – compared to just 2,458 MT from Ghana.

Participation

Asked to report on LI indicators N= 43
 Number of signatories/members who reported that LIRP was paid: *excluding signatories reporting 0.

- Côte d’Ivoire: 7
- Ghana: 5
- Other countries: 5

Participation

Asked to report on LI indicators N= 43
 Number of signatories/members who reported that farming households have closed the living income gap:

- Côte d’Ivoire: 6
- Ghana: 6
- Other countries: 6

Figure 8: **Volume for which a living income reference price was paid**

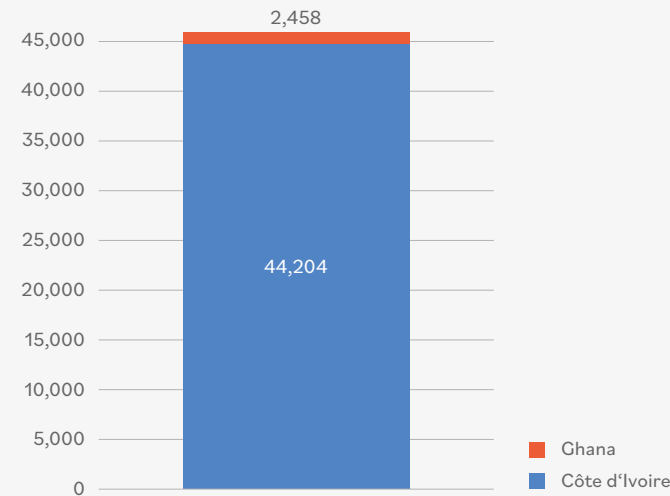
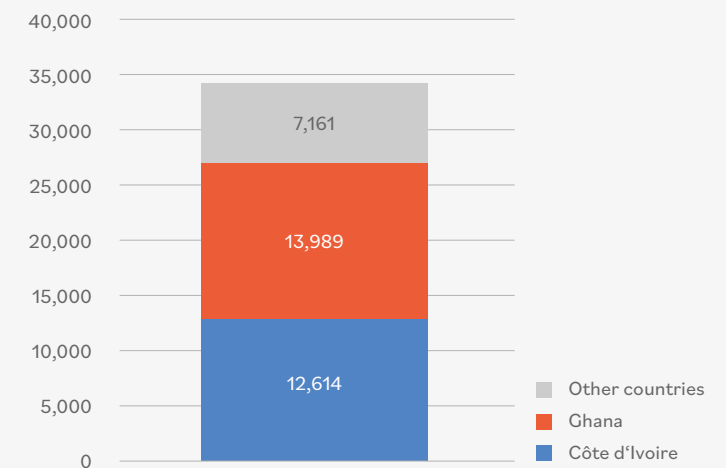


Figure 9: **Number of households that have closed the living income gap**



⁶ The LIRP was adjusted in October 2022 and this LIRP was used for the 2023 ISCO Monitoring Round.”

3.4 Child labour

All ISCO members are committed to ending the worst forms of child labour in the cocoa supply chain. Child labour remains a persistent challenge despite the continuous efforts of all stakeholders along the supply chain, necessitating sustained efforts and collaboration to ensure a brighter future for the children in cocoa-growing regions.

For the first time, this year's reporting has used a set of eight core indicators of ISCO members' efforts to address child labour. These indicators are fully aligned with the International Cocoa Initiative (ICI)'s members' reporting protocol. ISCO members who are also a member of ICI were given the opportunity to only report through ICI.⁷

According to the reports by 26 of the ISCO members, a total of 751,794 households in Côte d'Ivoire, Ghana, Cameroon and Nigeria were covered by Child Labour Monitoring and Remediation Systems (CLMRS) by the end of 2022.⁸ Being covered by a CLMRS means that a household is registered in a CLMRS and a monitoring visit or household-level risk assessment has been done. Twenty members provided data on the number of children covered by their systems, reporting 837,018 children covered by a CLMRS; 19 members reported on the number of cases of child labour, with a total of 106,620 identified by their CLMRS. Taken together, this represents 15.6 % of the children covered by those members' CLMRS. At the same time, 66,231 children, that is 60.5 % of those children identified as child labour, received support⁹ for remediation and prevention for the future.

Participation

Asked to report on child labour indicators N= 52
Number of signatories/members who reported on them varied between 14 and 26 depending on the indicator

⁷ 67 % of the households covered by a CLMRS implemented by an ISCO member were reported through the ICI data transfer option. Given that ICI tracks all reporting members along the supply chain and thereby rules out any double-counting (suppliers report on behalf of ICI members further down the supply chain), a risk of double-counting remains only for those 33 % of households covered which were reported by ISCO members through the ISCO tool.

⁸ More information on the overview and definition of Child Labour Monitoring and Remediation Systems can be found here: https://www.kakaoplattform.ch/fileadmin/redaktion/dokumente/2021_CLMRS_Benchmarking_study_--ICI_.pdf.

⁹ Support can be provided at the child, household, or community levels and can include the distribution of school kits, setting up bridging classes to help children (re-)integrate into school, or capacity building for the family to develop new income-generating activities, among other things.



In addition to identifying cases of child labour and providing support, another important aspect of CLMRS is their ability to use follow-up visits to regularly monitor whether children have stopped doing hazardous tasks; from this monitoring, a child labour withdrawal rate can be calculated. The data pertaining to these indicators has, however, not been included in this report, primarily due to reservations regarding the reliability of the underlying data on these specific data points. Both ICI and the ISCOs are actively collaborating to address this issue, providing support to members where appropriate, in order to ensure these metrics can be reliably incorporated into future reporting efforts.

There are several notable limitations to the data that warrant careful consideration. Although 52 members were asked to report on the child labour indicators, only 26 submitted data on this (including those who reported to ICI and agreed to share data). Out of these 26, just 19 members provided data on the number of children identified in child labour and only 13 members reported on all the six CLMRS indicators that cover all the core functions of a CLMRS and hence provide a more complete picture of their efforts to eradicate child labour through CLMRS. There may be several possible explanations for this gap.





For example, some CLMRS have only started operations recently, which means there may not yet have been enough time to provide support to all those who require it, or they have not yet reached the stage of follow-up visits after support has been provided. CLMRS further require careful data management, and some systems may still need to develop data management tools and build capacity to allow for the reliable tracking of individual children in their database. Finally, some ISCO members may need more clarification and guidance on indicator definitions and concepts. In all cases, this highlights a need for enhanced engagement with ISCO members to better understand the reasons for missing data points in their reports, and to guide them through the reporting framework if needed.

Three members covering a total of 4,810 households reported using another type of system to prevent and address child labour that does not meet the definition of a CLMRS. However, the current reporting framework captures only selected aspects of these programmes and their impact in terms of reducing child labour is not, in all cases, rigorously assessed. It is essential to note here that the reported data do not reflect the activities of members not associated with a supply chain, such as civil society organisations working on child labour projects without a private sector partner.

4. Where do we go from here?

2024 outlook and beyond

This joint monitoring brief marks a pivotal milestone in streamlining ISCO reporting efforts. It was made possible through the development of aligned core data points and the commitment to employing a joint monitoring tool. This collective effort has not only simplified the processes for our members but has also unlocked the potential to aggregate data across all ISCOs, thus offering an additional perspective to accompany the national-level data. By consolidating the data points spanning various ISCOs, we are now better equipped to substantiate sector-wide developments.

Some of the key conclusions which can be drawn from this year's reporting cycle include:

- Enhance the accessibility of traceability information along the supply chain: Origin information should be available at various points on the supply chain, spanning from traders, via manufacturers to retailers. Currently, traders have some origin information, but this information seems to be absent at the retail level. This could be because information is not passed on, infrastructure is not in place yet or because origin information is getting lost in a system of mass balance and mixing. This underscores that there is room for improvement to extend the availability of origin information further down the supply chain.
- Advancing deforestation-free cocoa: The forthcoming implementation of the European Union Deforestation Regulation (EUDR) by the end of 2024 underscores the urgency of increasing the share of deforestation-free cocoa. Currently, only approximately a quarter of the cocoa volume among ISCO members and signatories meets the EUDR's definition of deforestation-free.
- Strengthen reporting and efforts to close living income gaps of cocoa farming families. The quality of the data pertaining to living income needs to be improved. Nonetheless, existing data indicates that progress in achieving a living income for cocoa farming families requires a boost in efforts to close living income gaps.
- Improve understanding of CLMRS: There is a need to ensure ISCO members have a common understanding of CLMRS and strive for more effectiveness and efficiency in the implementation of such systems. Furthermore, members should think beyond their supply chain and take a more holistic approach to tackling child labour. The ISCOs' reporting system currently lacks ways to measure the impact of non-CLMRS systems and this needs to be improved.

As this year constitutes the first time that the data from across the participating ISCOs was brought together in one monitoring brief, this document serves as a foundational 'baseline.' With the number of ISCOs participating and members reporting expected to grow over the next years, data is likely to change and comparability will be restricted.

The opportunities for further enhancing a collective ISCO monitoring approach and report are substantial, but they need to be balanced with the specific needs of the individual ISCOs and their national reporting and monitoring priorities. Drawing on this year's experience, there are several areas of development that merit consideration as the future ISCOs collaborative monitoring endeavors take shape. Possible pathways could include:

- **Enhancing complementarity with national reports**

Explore ways to better align the joint ISCO monitoring brief with national reports in order to effectively use resources and improve consistency in ISCO reporting.

- **Expanding scope and external collaborations**

More immediately, this will include FRISCO joining the monitoring. Additionally, there is potential for incorporating external data sources on cocoa in Europe, possibly extending the ISCO monitoring to cover other European countries. Further strengthening collaborations with other organisations engaged in cocoa-related work is crucial, with a focus to aligning definitions and methodologies, and improved data sharing.

- **Adapting indicators to European regulations**

The ISCO monitoring can provide valuable information to policymakers, for example, on the current status of achieving EU regulations. Establishing a linkage between the ISCO reporting and the European targets, both within and beyond regulatory requirements, can be mutually beneficial.

- **Measuring impact in cocoa-producing countries**

Measuring the impact in cocoa-producing countries remains a significant challenge. The ISCOs could explore ways of capturing outcome and impact-related data more effectively through the monitoring process. This will help to better assess the real-world effects of our initiatives and interventions.



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