

# REPORT ON THE WORLD COCOA CONFERENCE 2014

AMSTERDAM, THE NETHERLANDS, 9 – 13 JUNE 2014

## Note by the Secretariat:

This report, prepared by the ICCO Secretariat, contains the summary proceedings and outcome of the World Cocoa Conference 2014. The report includes the *Amsterdam Cocoa Declaration* as well as an updated Conference Programme. The list of presentations and other documents are available on the ICCO website ([www.icco.org](http://www.icco.org)).



**9-13 JUNE 2014**  
AMSTERDAM, THE NETHERLANDS  
Ensuring a sustainable cocoa value  
chain to guarantee quality supply and  
enable future growth

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## REPORT ON THE WORLD COCOA CONFERENCE 2014

1. Following the highly successful first World Cocoa Conference held in Abidjan, Côte d'Ivoire, its second edition in Amsterdam had surpassed all expectations with over 1,400 participants from 65 countries worldwide. The Conference was a resounding success, and at its conclusion, delegates adopted the ***Amsterdam Cocoa Declaration (Annex I)***. The *Declaration* aims to build on the ***Global Cocoa Agenda***, a roadmap for the cocoa sector adopted in Abidjan, in order to further enhance its implementation, outlining the key issues faced by the cocoa sector and the best strategy and players to tackle them. The Conference reviewed the progress made and agreed on recommendations to chart the way forward to transform cocoa farming into a viable business activity, with farmers earning a living income and, in the process, moving the entire sector onto a path of sustainable development that will benefit all stakeholders along the cocoa value chain.
2. The Conference was organized by the International Cocoa Organization (ICCO) and held at the *RAI Convention Centre* in Amsterdam from 9-13 June 2014.
3. Sponsorship was generously provided by the Government of the Netherlands, IDH The Sustainable Trade Initiative, Cargill, Mars Global Chocolate, ADM Cocoa, Barry Callebaut, Mondelēz International, Afreximbank, Olam, Pro Ecuador, Syngenta, StoPak International, Bayer CropScience, BASF, Bühler, Filhet-Allard Maritime, The Hershey Company and Tradin Organic.
4. The World Cocoa Conference brought together 95 speakers and panellists. Participants included representatives from cocoa farmers, co-operatives, traders, exporters, brokers, processors, chocolate manufacturers, wholesalers, retailers, civil society, banks, insurers, supervisors, warehouse-keepers as well as governmental, regional and non-governmental organizations. There was a notable participation by farmers both in terms of numbers and geographic representation, in particular thanks to the generous sponsorship by the host country. The Conference provided participants a platform to forge partnerships through networking and business meetings.
5. The Conference was conducted over four days of plenary sessions and half a day devoted to three separate simultaneous tracks, on the topics of Sustainable Production, Sustainable Industry Chain and Sustainable Consumption. Participants were free to attend the track of their choice. In addition, interactive sessions were organized by partner institutions during the lunch breaks. At the closing ceremony, following the vote of thanks to the host country, Dr. José Antonio Martínez Rojas from the *Comisión Nacional del Cacao*, on behalf of the government of the Dominican Republic, graciously offered to host the next World Cocoa Conference in 2016.
6. The main objective of the World Cocoa Conference was to review the implementation of the *Global Cocoa Agenda*, with a special focus on how cocoa farmers can improve their income. The *Agenda* was adopted at the first World Cocoa Conference, which took place in Abidjan, in November 2012. It provides the roadmap towards achieving a sustainable world cocoa economy and outlines the strategic challenges facing the cocoa value chain, the recommended actions to address them and the responsibilities of the stakeholders in the cocoa sector at national, regional and international levels. After less than two years, significant progress has been made. One of the key recommendations of the *Global Cocoa Agenda* is for countries each to develop and implement a national Cocoa Development Plan derived from a fully transparent and participatory process with all key stakeholders involved in the cocoa sector, through public-private partnerships. Several countries have engaged in this process since then with, in particular, Côte d'Ivoire, the largest cocoa producing country, having made

significant progress. Another key recommendation was to increase the coordination of initiatives implemented, thereby allowing for more coherent and efficient actions to address the challenges faced by the sector. The largest cocoa and chocolate companies have since then developed a strategy to coordinate and align their cocoa sustainability efforts. However, much remains to be done. Realizing the vision of achieving a sustainable world cocoa economy is not expected to happen overnight, but the target will be met through taking small incremental steps and by focussing on continuous improvement. While the initiatives put in place go in the right direction, a thorough review of their impact is necessary. This is particularly important with regard to the improvement of farmers' incomes and livelihoods. The cocoa sector cannot be seen as sustainable as long as farmers do not get a decent livelihood from cocoa farming. Nevertheless, the rising level of coordination and communication between stakeholders in the cocoa community, and the tremendous energy being generated towards achieving the stated objectives provide strong hope that progress will continue to be made in coming years. This progress is to be monitored and coordinated by the ICCO Consultative Board on the World Cocoa Economy. The World Cocoa Conference offers an ideal platform to review and further this process.

7. The updated Programme of the World Cocoa Conference is attached to this report as **Annex III**. A summary of the breakdown of participants by country and by institutions and companies is contained in **Annex IV**.

#### **MONDAY, 9 JUNE 2014**

8. The **official inauguration of the Exhibition** in Hall 3 was conducted by Mr. Roald Lapperre, Deputy Director General, Ministry of Economic Affairs, the Netherlands and Dr. Jean-Marc Anga, Executive Director, International Cocoa Organization.

9. The Exhibition featured 50 stands highlighting 35 cocoa-related organizations and companies: Cargill, Mars Global Chocolate, ADM Cocoa, Barry Callebaut, Mondelēz International, Syngenta, Olam, Pro Ecuador, Afreximbank, Bühler Barth, Bayer Crop Science, BASF, Tradin Organic, Stopak International, Clariant, H D Cotterell, Nordic Dry, Delasal, International Cocoa Initiative, Utz Certified, Behn+Bates, Agiboo, Absortech, Programa de Fortalecimiento de la Competitividad de las MIPYME Nicaragüenses (Mizar Organic, Cacao Oro de Nicaragua Agronica, Le Cacaotal, La Campesina, Coodeprosa, MLR Forestal), Control Union, Dutch Ministry of Economic Affairs, Informa, IMAPAC, Coffee & Cocoa International and the International Cocoa Organization (ICCO).

#### **TUESDAY, 10 JUNE 2014**

10. The first plenary session of the Conference included the **Opening Ceremony and Welcome Speeches** by: H.E. Ms. Sharon A M Dijksma, Minister for Agriculture, The Netherlands, Dr. Jean-Marc Anga, Executive Director, International Cocoa Organization (ICCO), H.E. Mr. Luis Valverde, Vice Minister of Agriculture, Livestock, Aquaculture and Fisheries, Ecuador, H.E. Dr. Joe Tony Aidoo, Ambassador to the Netherlands, Ghana, and H.E. Mr. Jean-Louis Billon, Minister of Trade, Côte d'Ivoire.

11. The keynote presentation was delivered by the Executive Director of ICCO, Dr. Jean-Marc Anga, entitled "**How to improve cocoa farmers's incomes**". Among the issues highlighted was the farmer as the weakest link in the chain, often still living in poverty, with an income lower than what the previous generation achieved several decades ago. In order to improve the economic situation of farmers, an increase in the price of cocoa and chocolate products was seen as an attractive option, if

most of the increase can be directed to them. Higher income generated from cocoa farming would attract a new younger generation of modern farmers as a preferred choice for employment. So far, farmers capture only between 3 to 5% of the value of a chocolate bar. It was noted that an increase in the cost of raw cocoa would have a relatively limited impact on the industry and on consumers. While commending the industry to coordinate efforts through *CocoaAction* to increase productivity and quality in cocoa production, there is also a need to ensure balance between supply and demand for cocoa, so that any increase in production would not result to a decline in cocoa prices, thereby avoiding the “boom and bust” situation that had occurred in the past. Hence it is necessary to ensure that demand keeps pace with the increase in supply. Additionally, to ensure a remunerative income for farmers, policies to encourage farmers to adopt diversification rather than mono-cropping are generally seen as the way forward. The example of diversification undertaken by farmers in Vietnam was mentioned. This indeed reduces the risk of overdependence on a single crop, by relying on multiple sources of income from the farm. Increasing productivity would free some land for such activities.

12. **Panel 1**, entitled *“Implementation of the Global Cocoa Agenda: Progress by exporting countries on their national cocoa strategies”* highlighted progress in the implementation of the *Global Cocoa Agenda* in the main producing countries of Cameroon, Côte d’Ivoire, Ecuador, Ghana, Indonesia and Nigeria since the Agenda’s adoption two years ago. With cocoa being (one of) the main export crops, the governments in these countries are committed to support its sustainable development: Public Private Partnership Platforms have been or are being set up to formulate the National Cocoa Development Plans. The public sector plays a major role in the provision of infrastructure and education, the rehabilitation of the sector, the supply of planting materials (early maturing, more disease and pest resistant and high yielding varieties), extension services and fertilizers and in some cases, the determination of the farm gate price; the private sector contributes through vast financial support programmes and know-how, apart from the day to day individual business commitments. Quality and productivity are key issues, as well as market development in national, traditional and in emerging markets. Addressing gender inequality and fighting the worst forms of child labour were also seen among the important issues to be addressed.

13. The ever-rising average age of cocoa farmers is one of the main challenges in all producing countries, aggravated further by the lack of interest among younger generations. This can be mitigated by increasing farmers’ incomes. The world market price for cocoa is an important factor. Although the six countries represented produce over 90% of the global cocoa supply, any suggestion of forming a cartel, akin to OPEC, was dismissed as unsustainable. A remunerative price should be achieved instead through other policy instruments, such as promoting the development of viable business-driven cooperatives, the clustering of farmers, diversification into a variety of mixed crops and stimulating new demand.

14. **Panel 2** entitled *“Implementation of the Global Cocoa Agenda: progress by importing countries on their national cocoa strategies”* highlighted developments in cocoa consuming countries in respect of their national strategies. The Netherlands, Germany, Russia and Switzerland reported on their activities to promote the development of a sustainable cocoa value chain from their perspectives. The countries are active on two fronts: promoting the consumption of products based on sustainable cocoa in the home markets, while raising consumer awareness on the one hand and supporting cocoa sustainability programmes in producing countries on the other hand. The Netherlands and Germany are frontrunners in committing to sustainable cocoa consumption and creating national platforms for the promotion of sustainable cocoa and the exchange of information on activities in this context. Russia stressed the importance of increased sustainability of the cocoa sector as well, however, without any formal commitments. The country is finalizing steps to ratify the International Cocoa Agreement 2010

and follows the ten recommendations of the Trinidad and Tobago Round Table on a Sustainable Cocoa Economy as a guideline to contribute to the eradication of poverty in cocoa producing countries.

15. Financial support for cocoa sustainability is made available through direct bilateral cooperation as well as through multilateral approaches. Germany has reserved a large part of its funds for cooperation in Côte d'Ivoire, while the Netherlands' efforts are mainly concentrated in Ghana. However, all countries have included a wide variety of producing countries in their programmes. While importing countries represented were commended for their efforts to promote sustainability, Conference participants asked to be informed about the initiatives of the European Union as a whole, as well as other large cocoa consuming countries such as Belgium, France and the United Kingdom during the ensuing debate.

**WEDNESDAY, 11 JUNE 2014 – PLENARY, AUDITORIUM**

16. **Panel 3** provided the opportunity for the industry to present their activities. Under the heading *“Implementation of the Global Cocoa Agenda: The Industry’s progress, challenges and opportunities”* Mr. Bill Guyton, President of the World Cocoa Foundation, presented *CocoaAction*, a strategy developed by twelve of the largest cocoa and chocolate companies in the world, to coordinate and align their cocoa sustainability efforts. The first phase of activities is to focus on Côte d'Ivoire and Ghana. The objective is to improve the farmers' livelihoods, using a holistic approach with the emphasis on providing key inputs in cocoa farms, such as planting materials, fertilizers and training. Measurement of the impact of the programme is also very important. Among the initiators are ADM, Barry Callebaut, Blommer, Cargill, Hershey, Mars and Mondelēz, all of which were represented on the panel, related *CocoaAction* to their day-to-day business and other activities in the field of sustainable cocoa.

17. The panel agreed that discussion on a fair price for cocoa is a difficult issue. Competition laws forbid the companies to discuss their buying strategies and pricing. On the contrary, the price is left to be determined by market forces, the result of global supply and demand. Therefore, any strategy to achieve remunerative prices should be based on that principle. By diversifying the crop, the farmer becomes less vulnerable to price fluctuations. Although price is an important element of farmer income, it is not the only one. Yields, costs and farm size are other elements that should be considered in any policy recommendation for action to improve farmers' livelihoods.

18. **Panel 4** focussed on *“Value distribution from the farm to the chocolate bar”*. What is the farmer's share of the price of a chocolate bar? Is this an equitable share and if not, what can be done to improve the situation? The panellists, representing civil society, farmer organizations, national cocoa agencies and industry, agreed that the farmer's share is too low and discussed its causes. The liberalization in the eighties did improve cocoa's farm-gate price, but at the same time exposed farmers to price volatility and left them without the power to influence prices. Consequently, price stabilisation efforts are seen as an important factor, in addition to the level of price paid to farmers. Greater transparency in terms of the costs of processing of cocoa, of the manufacturing of chocolate and of retailing would also contribute to a better understanding of the value chain, with a view towards improving the situation of farmers. The emancipation of farmers and farmer organizations would place them in a much better position to get a better deal. This is necessary in order to convince younger generations to take over from their parents. Industry has to take some responsibility for the external impact of the supply chain, in terms of environmental and social consequences. Training and capacity building should form an integral part of sustainability programmes that should also include farmer empowerment, strengthening their bargaining position.

19. The audience was full of anticipation for **Panel 5 “Progress on global efforts to eradicate the worst forms of child labour in the cocoa sector”**, moderated by CNN’s Richard Quest. Combating the worst forms of child labour is one of the key challenges of the cocoa sector. It is the responsibility of elected governments to provide education and prevent the worst forms of child labour through targeted programmes to re-invest tax revenue collected from the cocoa sector in the cocoa growing regions. Additionally, there is a need for partnerships, as governments of cocoa producing countries cannot address this issue on their own. A dual approach is needed: to act against the worst forms of child labour that are already there, and to address the root causes so as to prevent them from (re)appearing, through addressing poverty issues. If farmers could receive more money for their cocoa, they would be able to send their children to school and hire sufficient labour, including for the most hazardous work in cocoa farms. However, there is not enough value in the cocoa supply chain to support economically viable production. Consumers may have to pay more for cocoa and chocolate products, thereby allowing further investments to enhance the sustainability of the cocoa sector by all stakeholders involved, in particular with regard to child labour. While more efforts are required from all stakeholders, it is recognized that addressing adequately child labour is complex. In particular, more transparency in governments’ policies related to addressing the roots of child labour is required and farmers should organise themselves into cooperatives in order to have a greater voice. The panel concluded that there are reasons to be hopeful: there has been a great improvement in recent years, there is a good monitoring system in place and the National Cocoa Development Plans are key instruments to coordinate actions being undertaken in order to address the worst forms of child labour.

20. How can the initiatives resulting from the drive toward sustainability improve farmers’ livelihoods? This was the central question in **Panel 6 “Beyond certification: Improving farmer livelihoods by mainstreaming sustainable cocoa”**. Existing sustainability certification schemes exhibited many areas of overlap, especially in the environmental and the social pillars of sustainability, but the same schemes are conspicuously deficient in the economic pillar. It is this area from which farmers’ benefit mostly emanates. The panel agreed that, going forward, a common framework with a greater attention paid to the economic pillar is required. Existing certification schemes have started to coordinate to address this concern, but certification is one of many tools in the tool box and cannot be expected to solve all problems. The National Cocoa Development Plans, established through Public Private Partnership Platforms, offer a wide range of instruments that can be mobilized in a coordinated approach in this regard to achieve sustainability. Within the common framework, some countries are developing their own national standards, to better serve their own national interests, using internationally accepted schemes as benchmarks.

21. In the short term, the market for sustainable cocoa has significant imperfections, as was expressed by a cooperative that had invested in obtaining sustainability certificates, but was unable to sell its cocoa with the premium that was supposed to go with the certificates. This problem needs to be resolved urgently in order to restore and keep the faith in certification. In the long run, companies remain committed to their promises on buying sustainable cocoa. The criteria for sustainability has to be focussed more on farmer empowerment, to ensure that the farmer does obtain real benefit from this development for the extra effort undertaken to comply with certification requirements. In short, certification has to be beneficial for farmers after deducting the costs it entails to embrace it.

22. **Panel 7 “Empowering cocoa producers by strengthening farmer-based organisations”** formed a logical conclusion of the two days of plenary sessions. One of the main ways to enhance equitable distribution of the benefits of the cocoa value chain, to establish a more equitable price for cocoa, to eradicate the worst forms of child labour and to enable farmers to better benefit from sustainability efforts and the drive toward farmer emancipation is the establishment and strengthening of farmer organizations. Transforming these organizations into economically viable business units is

one of the objectives of the National Cocoa Development Plans established by governments, through consultation with national stakeholders, and of the cocoa and chocolate industry and other development programmes funded by development agencies and consumer countries.

23. Farmer-based organizations should better stress the benefits of membership to farmers: better market access, improved yields, lower costs and better organization of the workflow resulting in economies of scale. The cost-benefit analysis of membership should give a positive result. However, there are also non-financial benefits to be taken into account, mainly including social cohesion and group dynamics that promote community development and the other positive externalities that result. Cooperatives should address the reasons why farmers are reluctant to join, like a lack of confidence and trust in the organization. However, farmers do need the resources to join, which is considered as a barrier for the development of such organizations.

24. Farmer-based organizations should be initiated by cocoa producers themselves, although governments have a supportive role to play. Security of tenure in terms of land ownership is very important. Only governments have the means to provide this. This would assist farmers to secure collateral for credit and other inputs, as well as incentivize farmers to reinvest on the farm with the knowledge that the investment is secure and will provide future streams of income to him and his family.

25. Several examples of successful cooperatives and development projects were given by the panellists. In ‘Coop Academies’, farmers and cooperative staff are trained. The curriculum focusses on Good Agricultural Practices, but also includes leadership courses to contribute to the empowerment of the cooperatives.

26. At the *Conference Dinner* held at the city’s 17<sup>th</sup> Century Maritime Museum, Mr. Maarten Camps, Secretary General of the Ministry of Economic Affairs of The Netherlands, welcomed attendees on behalf of the government of the host nation. Later that evening, Dr. Anga presented special awards to:

- Ghana’s 2013 national best cocoa farmer, Mr. Abraham Kwaku Adusei, as a representative of all cocoa farmers in the world in recognition of their outstanding contribution to the sustainability of the global cocoa sector;
- Ecuador: in recognition of its government’s leading role in coordinating and organizing all cocoa producing countries from Africa, Latin America and Asia to arrive with the ICCO at a joint position to address the issue of cadmium levels in cocoa; and
- Côte d’Ivoire, through the *Conseil du Café-Cacao*, to demonstrate the success that the world’s largest producer had shown in setting up a Public-Private-Partnership platform for its cocoa sector, to develop its national cocoa plan and further the development goals for the sector set out in the *Global Cocoa Agenda*.

**THURSDAY, 12 JUNE 2014 – TRACK 1, SUSTAINABLE PRODUCTION, AUDITORIUM**

27. The cocoa and chocolate industry has raised concerns that a lack of supply threatens the future of the sector, as productivity has not improved over the years and cocoa farming is not seen as an attractive proposition for the young generation. This track session offered a platform to discuss progress and propose innovative ideas to address this threat, focusing on making the business more financially appealing to farmers.

28. **Panel 8** had the subject of “*Improving cocoa productivity and quality through an integrated system*”. The key issue here is how to secure the future supply of cocoa, given that many analysts believe the global market has entered into a structural supply deficit situation. Cocoa farming is not a profitable economic activity for farmers faced with many challenges, including soil depletion, pests and diseases, ageing trees, ageing farmers, climate change, a non-remunerative price and the need to take care of environmental concerns. Farmers should be supported with a productivity package, seamlessly integrated with all the relevant components, including Good Agricultural Practices, improved soil fertility, high yielding and disease-resistant planting material, integrated crop management and protection. The farm should be turned into a business unit, the farmer into an entrepreneur: planning investments and making decisions based on cost benefit analysis. Higher productivity will improve profitability, diversification will increase farmers’ resilience and intensification will foster greater land-use efficiency and optimization of resource allocation. Service delivery is very important: allowing as many farmers as possible to benefit, including those in the remotest areas. A minimum and a maximum sustainable yield could be set as a target or benchmark in this regard.

29. A holistic approach can achieve productivity levels of 1000 kg/ha in West Africa and 2000 kg/ha in Latin America. Modernization is also a key principle in Latin America, with high-yielding fine flavour planting material and improved mechanisation, automation and innovation (e.g. solar energy). Governments and the private sector need to work together. Long term research is needed, as cycles in cocoa are very long. They are based on technology transfer, enhancing impact assessment and productivity aspects of certification. The development of cooperatives is very important, in order to allow farmers to benefit from the progress that is being made, improving, among other things, the capacity of the management and bankability of cocoa farming. This further reinforces the conclusion reached in the panel on “Empowering cocoa producers by strengthening farmer-based organisations” on Wednesday.

30. The private sector is investing in demonstration projects that reduce the negative impact on the environment: waste control, protecting biodiversity and reducing potential damage to farmers’ health as a result of production methods. It is important to have a clear communications strategy aimed at farmers and build on the existing knowledge and experience of farmers.

31. One of the main challenges in the cocoa sector is the ageing farmer population. **Panel 9** on “*Attracting a new generation of cocoa farmers and addressing gender issues*” was therefore of great interest. Cameroon shared its experience with a programme called *New Generation*, which offers young farmers a three-year support package that includes training, resource materials, exchange visits to broaden the horizons of the participants and sponsored certification of cocoa farms. The partners in the programme, such as ministries and communities, also invest and promote employment in rural areas to improve the attractiveness of rural life. Women have a different programme, adapted to meet the gender-related physical labour capacity.

32. The problem of ageing farmers often coincides with ageing trees, with a new generation of farmers tempted to enter cocoa planting by opening new areas. But this practice has severe limitations due to land constraints, as countries take measures to protect their forests due to environmental concerns. There are some initiatives where young people replant existing farms and share the crops with the existing farmers. Important measures to attract new farmers are access to land for the landless, access to credit and modernization and upscaling of existing farms. Similar efforts are needed to attract female cocoa producers, as well as women-oriented training, women farm groups, gender sensitization and woman monitoring systems.

33. Improved planting material is a very important component of a sustainable cocoa future. This requires a wide genetic diversity base, in order to develop new varieties. Fine flavour cocoa supports a niche market for fine flavour chocolate. This market attracts higher prices, allowing for higher farmer revenues and more finance in the supply chain to deal with environmental and social issues. Genetic diversity is crucial for the development of fine flavor cocoa. **Panel 10** on “*Protecting the diversity of cocoa and the prospects for fine flavor cocoa*” therefore discussed some key topics for the development of the cocoa sector. The wide genetic variety is needed to deal with the challenges posed by pests and diseases, environmental pressure, new market developments, smallholder production, quality and fine flavour requirements.

34. There are many threats to genetic diversity, so international cooperation between research institutions, governments and companies is crucial. As consumers are increasingly demanding higher quality and more choice, the markets also support these developments and the niche market of fine flavour requires the improvement of mainstream cocoa. Producer countries have a major role in genetic resource preservation and conservation. The Amazon basin, for instance, is home to many varieties. The prevailing level of knowledge on the cocoa plant has much improved thanks to research.

35. The *Direct Cacao* association has recently been founded to contribute to a sustainable fine flavour chocolate market. The main problem at this moment is that consumer demand is not large enough to support its broader development, so a key strategy is to promote the rich variety of flavours to the public. Another issue is related to the intellectual property rights of new developments and the confusion about the definition of fine flavour. Companies investing in the development of a fine flavour cocoa farm need to be able to buy the cocoa from that farm to recover their investments. There is a tendency for countries to protect their national genetic resources, whereas they should be rewarded and encouraged to share these.

#### THURSDAY, 12 JUNE 2014 – TRACK 2, SUSTAINABLE INDUSTRY CHAIN, EMERALD ROOM

36. Cocoa producers have been raising the alarm that they do not earn a large enough share of the value of the sector and that this threatens its sustainability, with farmers now turning to other crops seen as more profitable. This track session brought together the various parties involved in the cocoa value chain to review major market constraints and discuss opportunities to create more value at origin.

37. **Panel 11** discussed the topic of “*Improving market efficiency and transparency*”. There is a large concentration in the cocoa supply chain, with a few processors and chocolate manufacturers dominating the market. There is no evidence to suggest that this concentration has led to dominant market behaviour that could have an effect on market outcome. However, there is broad recognition that, as farmers have little or no bargaining power, they only get a small share of the distribution of its total value along the chain. The lack of transparency in the chain is a real issue. If consumers were sure that they could make a difference and would benefit farmers, they would be willing to pay a higher price.

38. Panellists also agreed that farmers’ incomes are, to a large extent, dependent upon the amount of taxes levied by governments and, in the case of Ghana, incomes are affected by the weakness of its currency (Cedi). Most of the factors that influence farm gate prices are beyond the control of farmers. Poor infrastructure and a lack of information remain a constraint for market access. If taxes would be increasingly reinvested in improving these conditions for the farmer, it would constitute less of a burden for the cocoa sector. Farmers have to invest in inputs to increase yields, but this leads to high risks. Providing access to microfinance could address this issue. Farmers would have increased

bargaining power if their cocoa was distinctive from other cocoa. Geographical Indications would improve the position of farmers, allowing them to charge premium prices as a reward for investments in quality.

39. By “*Adding value to cocoa at origin*”, the theme of **Panel 12**, producing countries would receive a higher share of the value chain. The grinding capacity in producing countries is rapidly growing. Côte d’Ivoire, for example, is currently the second largest grinder in the world, after the Netherlands. It seems like producing countries either choose to promote the interests of their national cocoa producers or those of their nationally-based cocoa processors, but that the two cannot be combined. In Côte d’Ivoire, the policy has shifted from industry to farmers with the reforms of 2012, creating problems, mainly for the small processors. This policy can be adapted and balanced without placing the cocoa producers at any disadvantage.

40. Although the share in grindings of producing countries has been growing at a relatively strong pace in recent years, this trend may slow down, especially in Africa. This is, however, not the case for Indonesia. Its position is expected to change into a net importer of cocoa, even though it is the third largest producer. Ghana has given tax incentives to the industry to promote growth. Beans are sold at a discount as well, but these are mid-crop beans with lower fat content. If tax holidays are given within a limited time-frame, they can be good instruments to promote this strategic important sector. One of the problems impeding the growth of industry in producing countries is the relatively small market within their borders for cocoa products. Latin America shows that the local market can grow, not only in chocolate, but also in other cocoa-based products. Ghana is following this example.

41. The last topic of the day in this track was **Panel 13 “Financing the cocoa sector”**. Afreximbank works through banks in the cocoa producing countries, benefiting from their local knowledge and reputation and partly avoiding currency problems, especially in Ghana. This way microfinance is provided. Farmers and cooperatives have limited access to credits, as they often lack the professional structure that banks like to see before extending credit. The top cooperatives have no problem in getting finance, the bottom group has to rely on NGOs and donors, but there is a large middle section that could be supported to reach a level where they can get external finance. This group is assessed through a fixed list of criteria and supported with remedial actions on issues where they fall short. Once they have passed the test, they are seen as an interesting market for banks, so they can get external finance. One opportunity to finance the cocoa sector is through ‘cocoa bonds’, but this requires that the investment would generate cash flows.

42. Another proposal would be a levy on cocoa, paid by the consumer, for a fund that would invest in sustainability. This sustainability fund could be administered by ICCO. A price increase of 0.4% of retail chocolate price would lead to a fund of US\$400 million per year. The fundamentals should be assessed and further investigated by a comprehensive study, including of the institutional constraints.

#### **THURSDAY, 12 JUNE 2014 – TRACK 3, SUSTAINABLE CONSUMPTION, ROOMS G102-G103**

43. Demand growth from mature markets, after a period of decline, has now stabilised or is growing at a slow pace, and is characterized by more stringent food safety constraints. Appetite for chocolate products in emerging markets is expanding, and origin countries are also looking at opportunities to develop their own local markets. This track session discussed these trends and how they affect the long term supply and demand equilibrium of the cocoa sector.

44. The EU and USA are the largest consumers of cocoa, but their share is declining as the growth rate in emerging markets is increasing. Cocoa consumption in emerging and origin markets is also

growing. The cocoa and chocolate industry has raised concerns that a lack of supply significantly constrains demand growth. **Panel 14** debated the theme of “*Managing the supply deficit*”. Over the last decades, supply and demand of cocoa have grown more or less in tandem. However, with productivity not improving over the years and cocoa farming not seen as an attractive proposition for the young generation, the market may have entered in a period of a structural supply deficit. This would have been more serious had the global economic crisis not occurred. The concentration of cocoa production, with two countries delivering more than half of the world’s cocoa supply, is a risk. Diseases like swollen shoot remain a threat, especially when they cannot be treated.

45. However, press articles and some statements made have been exaggerating the extent of the problem. The current 2013/14 season is now anticipated to experience a nearly balanced situation in supply and demand. In particular, the situation in Côte d’Ivoire is encouraging, as new planting has occurred in recent years, probably as a result of higher cocoa prices, resulting in the average age of the tree population declining. Efforts should be directed towards ensuring that cocoa farming provides a competitive income, as compared to other tropical crops. The higher prices may have an impact, but there is a two-year supply response lag.

46. Cocoa consumption in volume in Western Europe and North America is beginning to decline. The trend in these markets is towards ethical and high quality consumption. For the time being these remain niche markets, but this is where most of the growth in consumption in traditional markets takes place. A harmonization of sustainability certificates will contribute to growth, as nowadays the consumer is confused. Consumers would be prepared to pay extra for sustainable cocoa, but the market is very complex. Market growth is now originating from non-traditional chocolate consuming markets, and in particular China.

47. **Panel 15** agreed that “*Promoting cocoa consumption in emerging markets and in origin countries*” is a good method to promote consumption in general, as the growth potential is very high. It is also an excellent approach to increase exporting countries’ share in the value chain and to raise the profile of cocoa growing in order to attract young people into the business.

48. Grinding capacity is growing fastest in China, and is expected to reach about 200,000 tonnes in the next five years. Cocoa beans are also to be produced in China in two years’ time. Most of the local consumption is through cocoa powder, in confectionery products and in drinks.

49. Cocoa consumption in producing countries faces several constraints: the income is relatively low, so there is a need for affordably-priced cocoa products; cocoa consumption is not part of the national cultural traditions, and the weather is often too hot for cocoa consumption. In Ghana, Indonesia and Nigeria, cocoa consumption is being promoted through government supported ‘cocoa days’ or ‘cocoa weeks’. Even with a low consumption per capita, countries with large populations, such as Indonesia and Nigeria, will have an impact on the world market. The government, industry and others in the cocoa sector work closely together in these countries. Research is being undertaken into promoting the health benefits of cocoa consumption. In Nigeria, the government is encouraging the inclusion of cocoa-based products in school and hospital meals. There is a risk that, in producing countries, only the poorest quality cocoa is used, as it does not attract high prices. Promoting regional cooperation among producer countries may lead to lower production costs for cocoa-based products, but currently, each country has been developing its own promotion programmes.

50. **Panel 16** on “*Food safety in the cocoa sector: how best to help producers comply and influence legislation?*” was the last panel in this track, but certainly not the least important. All stakeholders in the cocoa value chain pay serious attention on issues of food safety. There are food

safety issues at consumption level, but there are also health and safety risks at production level, animal and plant health issues and image risks for brands and for producing countries. For cocoa producers it remains a challenge to get all the relevant information and to fully understand them. Governments and industry should play a role to provide the right information and training to cocoa producers. For the EU, traceability is important to manage food safety risks. Legislation is continuously changing and many bodies are involved. Many countries outside the EU have their own legislation as well. Harmonisation is key to help cocoa producers, as without it, complying with the rules is very difficult, especially as different sets of rules exist for different markets. In Latin America, cocoa producers have been used to cooperation and they have often intervened to promote their own interests. This form of cooperation, if adopted, would also strengthen the position of West African cocoa farmers. Producers can register a complaint at the Standards and Trade Development Facility of the World Trade Organization if they feel that legislations are too stringent. Another obstacle facing producing countries is the capacity of the laboratories needed to assess food safety risks of cocoa before export.

#### **THURSDAY, 12 JUNE 2014 – PLENARY SESSION, AUDITORIUM**

##### ***STRATEGIC MANAGEMENT ON WORKING TOGETHER TOWARDS A SUSTAINABLE COCOA ECONOMY***

51. At the beginning of the session, the ICCO Executive Director recalled that 12 June is the ILO World Day Against Child Labour. Representatives of the trade union delegation and members of civil society participating at the World Cocoa Conference read a statement (cf. **Annex II**) recognizing the work done by the cocoa community to address child labour on cocoa farms and calling for all stakeholders to step up their efforts in this respect, in particular in addressing rural poverty, the roots of the problem.

52. The main theme of the World Cocoa Conference was the implementation of the *Global Cocoa Agenda*, with a special focus on policies to strengthen the National Cocoa Development Programmes (NCDP) through a multi stakeholder process in the Public Private Partnership Programmes. One of the central questions was how to improve the farmers' livelihoods. It is interesting to note the development in the cocoa economy over the past years. Much has been done, but there is still a lot to do. It is very important to align all initiatives to promote the sustainable development of the cocoa economy: private sector actions, donor programmes and national policies. The NCDP offers the right framework. It is important to define good key performance indicators to measure progress in the implementation of the *Global Cocoa Agenda*. Realizing the vision of achieving a sustainable world cocoa economy is not expected to take place overnight, but the target will be met through taking small incremental steps by focussing on continuous improvement. Hence it is necessary to identify the milestones with measureable indicators in the next steps, using the *Global Cocoa Agenda* at the international level and the national cocoa development plan at the national level as roadmaps. Actions could then be prioritized with the necessary experts working groups set up for this purpose.

53. Issues like child labour need to be tackled in a much broader framework, addressing the root of the problem as it reflects a symptom of the main underlying cause, i.e. rural poverty.

54. There is a need to restructure cocoa farming, empowering farmers and farmer organizations, turning the farm and the organization in an economically viable business unit, introducing diversification. This will strengthen the bargaining power of farmers and offer them the possibility to secure good livelihoods. There is not enough value in the cocoa supply chain, so it is not only a question of the equitable share, but also of price of the end products. On the other hand, research should be done into the optimal farm size, which could provide the right basis for a remunerative income. The cocoa sector must also increase resilience against climate change.

55. Some front-running consuming countries have presented their projects at this conference; at the next World Cocoa Conference, others should show that they are catching up.

56. The role of governments in producing countries should not be neglected: taxation is an important issue as well as the question of how the means that are collected from the cocoa sector are being reinvested. Governments should be made accountable. Governance and transparency were other issues highlighted that could contribute to the improvement of cocoa farmers' livelihoods.

57. Transparency over land tenure is also crucial. Cocoa producing countries should create a legal, administrative infrastructure that brings certainty over land ownership and land lease. Some countries are already working on this. Knowledge of national cocoa resources is equally important and in this regard countries should establish an inventory of cocoa resources as a foundation for a sound national cocoa policy. The conclusions of the workshop on certification organized by the ICCO in Zurich in March 2014 are the basis for the next steps as regard to the further development of sustainability certification: an all-encompassing sustainability framework to address issues such as the confusion of farmers and consumers faced with the multiplicity and complexity of schemes, with a greater emphasis on the economic pillar. This approach will ensure that farmers will benefit from mainstreaming sustainable cocoa. But certification alone cannot achieve a sustainable world cocoa economy: it has to be addressed in the broader context of measures in a coordinated and coherent manner through the multi-stakeholder process in the NCDP.

58. In the second half of the afternoon, a **drafting committee** comprising key representatives of cocoa stakeholders along the value chain met to draft the recommendations based on the deliberations conducted during the conference in a draft document entitled the *Amsterdam Cocoa Declaration*, to be presented for adoption on the following day.

59. Reflecting the fact that the Amsterdam seaport area is the largest in the world for handling and storing cocoa, and that the industry around Amsterdam accounts for about 15% of world grindings, Conference delegates on Thursday afternoon were offered three separate **site visits** to help them discover the region's cocoa sector, as an alternative to the afternoon session. Over 100 delegates took part, visiting leading manufacturer of cocoa processing and chocolate making equipment Royal Duyvis Wiener, Tradin Organic's Crown of Holland speciality cocoa processing plant, and local cocoa warehousing and handling facilities operated by Steinweg Handelsveem, Vollers Holland and H. D. Cotterell.

#### **MONDAY JUNE 9 – THURSDAY JUNE 12 2014: INTERACTIVE SESSIONS**

60. During the lunch breaks of the World Cocoa Conference, as well as on the opening day of the Exhibition, **interactive sessions** were organised on selected topics, including: How can we develop a strategic research agenda and coordinate research activities to improve impact and efficiency? How can nutrition security be included in cocoa supply chain intervention programmes? How can fertilizers contribute to soil fertility, rejuvenation and rehabilitation as well as diversification of cocoa farms? How can we learn from current activities to develop strategies to protect children and include female farmers? What do we know about equitable value distribution in the cocoa chain and about decent living incomes for farmers and how can we achieve improvements? Are full package or tied service delivery models the most effective for scaling up, or will farmers prefer to choose between different service providers for their inputs? All these questions were raised during six interactive and well attended afternoon and lunch break sessions.

61. The cocoa community is ready to collaborate to develop a *strategic research agenda*, as highlighted during the session organized by Wageningen UR on Monday 9 June. Initial results of a survey held among professionals in both the cocoa and coffee sectors reveal the needs and the gaps in current knowledge, and identify ideas for future research and knowledge needs: agronomy, climate change, pests and diseases and productivity. Maintaining and increasing quality and supply are major drivers of research. Overlap in research is not always considered negatively, but more coordination and collaboration would favour efficiency and efficacy. The establishment of a number of online research platforms and Public Private Partnerships (PPPs) in both producing and consuming countries could contribute to this. The Dutch Top Sector PPP project, for instance, shows that research and knowledge institutes, traders, grinders, manufacturers, certifying agencies and the public sector can join hands. This initiative will catalyze and improve partnerships, financing and the type of research conducted collaboratively, to support sustainable cocoa and coffee chains into the 21st century. Challenges remain with regard to ownership of research data, confidentiality when it comes to innovations, pre-competitiveness and the availability of (financial) resources. A way forward is the creation of a committee to further develop the strategic research agenda and the extension of the survey/mapping exercise identifying who does what and where, as well as the publication of research results on online platforms to increase the open access and exchange of knowledge. Coordination, complementarity and communication are key ingredients for joint research collaboration to support sustainable cocoa chains in the 21st century.

62. The Global Alliance for Improved Nutrition (GAIN) wants to build a bridge between nutrition security and agricultural development by addressing *nutrition security and the right to access to food* in farming communities, also in the cocoa producing regions, as presented on Tuesday 10 June. Through tools like the IDDS (Individual Dietary Diversity Score) and the 1000 days concept, GAIN shows the importance of a diverse diet. The IDDS provides insight into the food intake of individuals from different food categories, based on the nutritional value of the food. The 1000 days concept explains the significance of the intake of essential vitamins and minerals during the first two and half years' of a child's life, as that is the most important phase of brain development. The business case that GAIN makes is that good nutrition and an improved dietary diversity for farmers and their families will contribute to a healthier and stronger workforce and increased cognitive skills and physical potential of children. This will lead to higher productivity, a secured work force and more powerful economic growth. Investment in nutrition should be an integral part of interventions programmes, through attention to good nutritional practices next to GAP, the use of local and national media to communicate about nutrition and including nutrition in sustainability standards.

63. The *Cocoa Fertilizer Initiative* (CFI) is a Public Private Partnership coordinated by IDH that aims to restore soil fertility to increase productivity, providing economic opportunities for West African cocoa farmers and improving their livelihoods. As described on Tuesday 10 June, through a pilot project in Côte d'Ivoire and Nigeria, farmers receive training and extension services on fertilizer application. Close monitoring and evaluation of this pilot provides data to support fertilizer policy making in Côte d'Ivoire. Although no impact could be seen during the first half year, over time a more promising and statistically significant trend is expected to be observed. Training on the right fertilizer application and the mix of organic and mineral fertilizer is important. It is essential for cocoa growers to gain insight into calculations on the returns of investment. Fertilizer should be seen as an investment rather than a cost. Cocoa is a tree crop, so it takes at least three years to monitor the returns on investment. The need for diversification is stressed: tripling cocoa yields on less acreage will support crop diversification. It is hoped that CFI will improve access to fertilizers at the best price possible to all farmers, and not only to those who are organized into cooperatives. Restoring soil fertility to the

West Africa cocoa belt requires a careful approach in which PPPs like CFI, could be supportive and stimulating.

64. Achieving *gender equity* by improving the position of women will create a win-win situation benefitting cocoa communities and industry, as discussed on Wednesday 11 June. Women are important for high quality cocoa production, as they are mainly involved in early plant care and post-harvest activities such as pod-breaking, fermenting and drying, which are key to the quality of cocoa. Policies should include facilitating participation in training (for instance, by paying for day care for their children), increasing their numbers in leadership positions by educating girls, recognizing women as farmers, and by changes in legal and cultural contexts to allow land ownership and succession. Education of (young) women will contribute to their empowerment. Improving school attendance will also lead to reductions in child labour. Many examples of educational development strategies were given, including supporting the building of schools, and the development of a specific age-group education and empowerment system that aims at empowering young women and girls in rural communities.

65. The Child Labour Monitoring and Remediation System (CLMRS) aims at reducing the *child labour* risk in the cocoa supply chain and is a good practice that could be integrated and rooted in the communities and cooperatives. The International Cocoa Initiative (ICI)'s Protective Cocoa Communities Framework (PCCF) estimates levels of protectiveness of each community, based on the conditions, features and availability of services within a community that are most conducive to protecting children. Addressing gender inequality, investing in education of children and working on child protection and child-centered community development are essential for the future of cocoa communities.

66. *Value distribution and living income*, a topic discussed on Thursday 12 June, are and will continue to be subject of debate. They are complex issues as the cocoa value chain involves so many actors. Who earns what, and is distribution along the value chain equitable? What does a farmer need for a decent living income? How to ensure a cocoa farmer gets a better price? Answering these questions requires looking at the business model of the cocoa farmer, a re-evaluation of the mechanism that sets the price for the product and of the level of transparency of profits earned. Several options were discussed: increasing farm gate prices, certification as a mechanism to set prices, diversification and better organization of farmers (improving negotiating power), increasing productivity, transparency of taxation and government expenditures in producing countries, increasing consumer awareness, learning from other commodities and other industries' approaches (like the "better cotton initiative"), learning from other countries (such as Indonesia and Peru, where farmers are more satisfied with the prices than in Africa) and looking at retailers' margins. Do market mechanisms work efficiently, or is the market proven to be inefficient in distributing value among its participants? The solution might come from companies, stimulating innovation. The debate is not over yet, as all parties want to secure future cocoa farming.

67. Smallholder farmers need to improve their performance and returns. Governments, NGOs, extension agents, civil society organizations and, increasingly, cocoa buyers provide a range of services. A study on 41 *service delivery* models around the world and the presentation of a new service delivery model CORIP, built around rural service centers in Ghana, formed the input on Tuesday 12 June to debate the effectiveness of bundled services. Also addressed were the need of government and NGO partnerships to get new service delivery models off the ground, the role of governments in providing seedlings and the offer of services tied to the sale of cocoa beans. Some main outcomes of the discussions were agreement that sometimes decentralized service delivery could better cater for different needs of different groups, and sometimes it might be cost-efficient only to provide group

services. Farmers may indeed need access to service packages, but these should not necessarily come from the same provider. In partnerships, actors should stick to their core responsibilities. Bundling services might help to prevent diffused impact, but it requires the cooperation of many actors. A physical place where different providers offer their services could be more feasible than rural service centres offering bundled services. Coordination with governments' efforts could be improved. Governments might have a role in providing seedlings, but not alone; other actors are also taking responsibility and sometimes the management of the provision programme turns out to be a challenge. Feasibility of tied services depends on the local situation. Most of the time only a small part is tied to the sale of cocoa beans.

**FRIDAY, 13 JUNE 2014 – PLENARY SESSION, AUDITORIUM**

68. Mr. Achille Bassilekin, Assistant Secretary General, Sustainable Economic Development and Trade Department, at the ACP Secretariat, stressed the progress made in the past two years since the first World Cocoa Conference.

69. The ICCO Executive Director read out the *Amsterdam Cocoa Declaration* which was adopted by participants. Over 1,400 participants from 55 countries had reviewed the *Global Cocoa Agenda* and charted the way forward. Reviewing the implementation of the *Global Cocoa Agenda*, participants were positive that significant progress had been made in some areas, but also highlighted that a lot more remains to be done in other areas, in particular with regard to incomes generated by cocoa farming. The approach would be to ensure that cocoa farming, both for individual smallholders and farmers' organizations, becomes economically viable.

70. Closing remarks, with a vote of thanks to the Government of the Netherland for being an excellent host and for her generous support for the Conference, were expressed by Dr Jean-Marc Anga on behalf of all participants. The Executive Director also thanked all sponsors for their kind contributions, as well as thanking speakers, moderators, rapporteurs, interpreters and participants for their active participation. This was followed by the closing address to the Conference made by Mr. Roald Lapperre, Deputy Director General, Ministry of Economic Affairs, The Netherlands.

71. On behalf of the government of the Dominican Republic, Dr. José Antonio Martínez Rojas, member of the *Comisión Nacional del Cacao*, offered to host the Third World Cocoa Conference in Bávaro (Punta Cana), Dominican Republic in March 2016.

72. The World Cocoa Conference concluded with a press conference.

## ANNEX I



### Amsterdam Cocoa Declaration

#### Introduction

At the kind invitation of the International Cocoa Organization (ICCO) and of the Government of The Netherlands, more than 1,400 participants coming from 65 countries worldwide, representing all stakeholders in the cocoa value chain, met in Amsterdam, The Netherlands, from 9-13 June 2014, for the Second World Cocoa Conference.

Over the five days, the participants reviewed the implementation of the *Global Cocoa Agenda* adopted in November 2012 in Abidjan, Côte d'Ivoire, and charted the way forward.

The *Global Cocoa Agenda* provides the roadmap towards achieving a sustainable world cocoa economy. It outlines the strategic challenges facing the cocoa value chain, the recommended actions to address them and the responsibilities of the stakeholders in the cocoa sector at national, regional and international levels.

After the opening ceremony, participants from governments of cocoa-producing and cocoa-consuming countries and from the cocoa and chocolate industry reported on the progress achieved in the first two years of implementation of the *Global Cocoa Agenda*, identified the constraints faced and the remedial actions taken, as well as the adjustments made.

Participants agreed to step up their efforts and to further enhance the implementation of the *Global Cocoa Agenda*. Overall, reviewing the implementation of the Agenda, they expressed satisfaction about the significant progress made in some areas while acknowledging the challenges faced in others, concluding that much more remained to be done, in particular in the area of improving cocoa farmers' incomes and increasing their resilience in the face of price volatility, while ensuring their food security.

Participants recognized that sustainability in the cocoa sector requires a much wider perspective, encompassing developmental aspects, the responsibilities for which lie beyond the cocoa sector *per se*.

To unlock the potential of the cocoa sector for the benefit of all its actors, the Conference called for closer collaboration and alignment between the stakeholders, acting in a co-ordinated manner to pool existing resources and to use expertise within individual stakeholders and initiatives to maximize its impact through public-private partnerships (PPPs) and other strategies. Such an approach would bring about meaningful results, to the advantage of all stakeholders, especially the smallholder cocoa farmers who remain the most vulnerable in the value chain.

This approach would also ensure that farming, both for individual farmers, and for farmer-based organizations, becomes economically viable, enabling producers to take advantage of market opportunities, while also providing them with decent livelihoods and meeting the growing global demand for cocoa and chocolate products.

Efforts should be made to ensure that supply and demand of cocoa and chocolate products grow in tandem and in a balanced way, so that an increase in production does not apply downward pressure on prices.

## Priority Areas

Going into the specifics, the conference agreed on the following recommendations as the next steps, in line with the *Global Cocoa Agenda*:

1. The establishment of and/or the strengthening of fully inclusive, transparent and participatory Public-Private Partnerships (PPP) platforms is encouraged to design and implement National Cocoa Plans;
2. National Cocoa Plans should give priority to policies that empower farmers and improve their income in a clear and measurable way;
3. National Cocoa Plans should, as a matter of urgency, undertake an inventory of cocoa resources, to assist in the process of production planning and to evaluate the impact of production policies on prices and on farmers' income;
4. Working groups should be established within the framework of the national platforms to investigate country-specific issues such as the Improvement of Productivity and Quality; Cocoa Genetic Resources; Consumption promotion, especially in Emerging and Origin countries; Prices and Farmers' Incomes; Value addition; Diversification packages; Model Farms (minimum farm size and crop combination to ensure economic profitability); Land Tenure; Good Agricultural Practices; Farmers' Organizations; Farmers' Training in Business Management; Certification; Child Labour; Gender Equality; Impact of climate change; Biodiversity etc., and to make recommendations that are pertinent to local contexts;
5. Corporate or private cocoa initiatives may promote innovation and, where appropriate, it is highly recommended that these are well coordinated in the framework of national plans;
6. International coordination of cocoa sustainability programmes should be improved by building on existing initiatives such as CocoaConnect, CocoaMap and CocoaDatabank, Ingenic, Cacaonet, and other similar initiatives and create synergies;
7. Relevant actors in the cocoa value chain should collate and adopt Key Performance Indicators (KPIs) to evaluate the impact of specific policies and initiatives and make appropriate recommendations as and when required;
8. A working group should be set up to study the feasibility of establishing a Global Cocoa Sustainability Fund to provide additional direct and timely financing for projects and programmes in the cocoa sector, primarily for the benefit of producers.

## International Alignment

Recognizing that long-term sustainability is an evolving process which requires a transformational change in the global cocoa value chain, the Conference agreed to keep up with the momentum of the first World Cocoa Conference, using the *Global Cocoa Agenda* as the roadmap.

In this regard, the Conference agreed to further strengthen the role of the ICCO Consultative Board on the World Cocoa Economy (Private Sector) which was tasked to monitor the implementation of the *Global Cocoa Agenda*.

The Conference proposed to raise the seniority of the members of the Consultative Board to ensure that they are empowered to discuss issues and consequently to take decisions that can be swiftly implemented for the benefit of the entire cocoa value chain.

In addition, it is proposed to introduce a series of Key Performance Indicators to measure progress in the implementation of the *Global Cocoa Agenda*.

The Conference commended cocoa-exporting and cocoa-importing countries that have established public-private partnership platforms to formulate and implement their national cocoa plans with all the appropriate components. The Conference encouraged other countries to establish their platforms, as a matter of urgency, in order to enable better coordination of cocoa initiatives at regional and global levels.

The Conference commended the twelve companies in the cocoa and chocolate industry for their spirit of cooperation, leading to the development of *CocoaAction*, and for the decision to align with government and other initiatives in producing and consuming countries.

The International Cocoa Council is kindly requested to authorize an adjustment in the membership of the Consultative Board to reflect this development.

The Conference reaffirmed the mandate to the Consultative Board, under the authority of the International Cocoa Council, in accordance with the provisions of the International Cocoa Agreement 2010, to continue acting as the think tank providing the overall strategic direction for the cocoa sector in its vision to achieve a sustainable world cocoa economy.

The Consultative Board is requested to established expert working groups to investigate the topics identified in the priority areas, making recommendations as appropriate. In this respect, it is proposed that work on the draft list of indicators and targets will continue in the working groups. The working groups would include experts on all relevant topics and would work in between and during the statutory meetings of the Consultative Board where progress reports and appropriate recommendations to the ICCO Council can be made.

### **Word of thanks to Host Government and sponsors**

Participants expressed their deep gratitude to the Government of The Netherlands for its fantastic hospitality, generous sponsorship and impeccable logistical support in organizing the Second World Cocoa Conference.

### **Next Conference**

Participants accepted the kind offer of the Government of the Dominican Republic to host the Third World Cocoa Conference in March 2016, in Bávaro (Punta Cana), to be facilitated by the ICCO Secretariat.

## **ANNEX II**

### **ILO World Day Against Child Labour, June 12, 2014**

#### ***Statement by the trade union delegation and members of the civil society participating at the World Cocoa Conference 2014***

The international cocoa community is meeting in the framework of the World Cocoa Conference 2014 in Amsterdam. Today, June 12, is declared by the ILO to be the World Day Against Child Labour. On this special day we would like to express our support for the activities of the ILO and other parties involved in the fight against child labour by delivering this statement.

Regularly the ILO makes an estimation of the number of children in child labour worldwide. Most of them work in agriculture. Also in our cocoa economy child labour and child trafficking exists. We should recognize that many children who work on cocoa farms do so within their family structure to help their parents. They do so without jeopardizing their well-being; they have access to education. However, many others are still working as child labourers, often in hazardous conditions.

As most of the cocoa is cultivated on family farms in small communities, the first step in rooting out child labour from cocoa farms is to make sure that individuals in the community understand that some agricultural work activities can be very harmful to children. But these communities need the help of the international cocoa community. We all share the responsibility to eradicate the worst forms of child labour in cocoa as soon as possible and make basic education available to all children.

We appreciate the work of the governments in the cocoa producing countries in raising awareness amongst cocoa farmers about child labour. But as poverty still is a major breeding ground for child labour we all have to contribute to eradicate poverty from the cocoa communities. Because even as cocoa communities are willing to declare themselves child labour free, the risk of putting children to work without access to education still remains as long as cocoa communities are caught in the trap of poverty.

In the 2014 ILO World Day Against Child Labour, emphasis is laid on the framework of social protection in the struggle against child labour. We, as international cocoa community, can assist national governments in developing and formulating social protection plans. But we also have our own responsibility. In furthering a sustainable cocoa economy we should also take effective measures to improve the welfare of the local cocoa communities. Necessary means should be made available to cocoa communities to create access to proper sanitation and to electricity, build houses, schools, social and medical facilities and improve the logistic infra-structure.

Only with flourishing cocoa communities we can expect cocoa farming to remain attractive and sustainable. And then we can guarantee to our consumers that the cocoa in their chocolate is coming from happy communities and is child labour free. Because, as we all know: child labour free chocolate tastes better.

*Amsterdam, 12 June 2014*

ANNEX III

PROGRAMME OF THE WORLD COCOA CONFERENCE



WORLD COCOA CONFERENCE 2014

9 – 13 June 2014, Amsterdam RAI Convention Centre, Amsterdam, the Netherlands

MONDAY 9 June 2014

13:00                    *Registration (Onyx Lounge) open*

14:00                    *Exhibition (Hall 3) open*

16.30 - 18.00        *Exhibition (Hall 3): Official Inauguration of the Exhibition and Reception*

- **Mr. Roald Lapperre**, Deputy Director General, Ministry of Economic Affairs, The Netherlands
- **Dr. Jean-Marc Anga**, Executive Director, ICCO

18.00                    *Exhibition and Registration Desk closes*

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TUESDAY 10 June 2014

PLENARY SESSIONS (AUDITORIUM)

8:00                    *Registration (Onyx Lounge) open*

***Official Opening Ceremony and Welcome Speeches***

09:30                    **Welcoming Remarks**

- *Welcome on behalf of the host Government by H.E. Ms. Sharon A M Dijkma*, Minister for Agriculture, The Netherlands
- *Welcome Address by Dr. Jean-Marc Anga*, Executive Director, International Cocoa Organization (ICCO)
- *Address by H.E. Mr. Luis Valverde*, Vice Minister of Agriculture, Livestock, Aquaculture and Fisheries, Ecuador
- *Address by H.E. Dr. Joe Tony Aidoo*, Ambassador to the Netherlands, Ghana
- *Address by H.E. Mr. Jean-Louis Billon*, Minister of Trade, Côte d'Ivoire

11:00 *Keynote Presentation: The Farmer in the cocoa value chain: How to improve his income?*  
**Dr. Jean-Marc Anga**, Executive Director, ICCO

12:00 *Lunch (Exhibition, Hall 3)*

*(Interactive Session: Roadmap to 'Nutrition Secure' Cocoa Supply Chains--Room G104)*

*(Interactive Session: The Cocoa Fertilizer Initiative--Room G105)*

### PLENARY SESSIONS (AUDITORIUM)

#### ***From Abidjan to Amsterdam: Progress on the Implementation of the Global Cocoa Agenda***

14:00 **Panel 1 - Implementation of the Global Cocoa Agenda: Progress by Countries on their National Cocoa Strategies**

Moderator: **Dr. Joost Oorthuizen**, Executive Director, IDH, The Sustainable Trade Initiative

*Presentations by Cocoa Exporting Countries:*

- **Mr. Michael Ndoping**, Director General, ONCC, Cameroon
- **Mrs. Massandjé Touré-Litsé**, Director General, Conseil Café Cacao, Côte d'Ivoire
- **H.E. Mr. Luis Valverde**, Vice Minister of Agriculture, Livestock, Aquaculture and Fisheries, Ecuador
- **Dr. Stephen Opuni**, Chief Executive, Ghana Cocoa Board
- **Mrs. Musdhalifah Machmud**, Deputy Assistant for Affairs of Plantation and Horticulture, Ministry for Economy, Indonesia
- **Dr. Peter Aikpokpodion**, Leader, Cocoa Value Chain Development, Agricultural Transformation, Federal Ministry of Agriculture and Rural Development, Nigeria

16:00 *Cocoa Break*

16:30 **Panel 2 - Implementation of the Global Cocoa Agenda: Progress by Countries on their National Cocoa Strategies (Continued)**

Moderator: **Mr. Philip M. Sigley**, Chief Executive, Federation of Cocoa Commerce

*Presentations by Cocoa Importing Countries:*

- **Mr. Marcel Vernooij**, Head, Global Affairs, Ministry of Economic Affairs, The Netherlands
- **Ms. Beate Weiskopf**, Acting Manager, German Initiative on Sustainable Cocoa (GISCO)
- **Ms. Yulia Lebedeva**, Deputy Head of Desk, Department of International Organizations, Ministry of Economic Development, Russian Federation
- **Mr. Conradin Rasi**, Deputy Head, Economic, Finance & Trade Section, UK Embassy of Switzerland

17:30 *End of day's session*

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**WEDNESDAY 11 June 2014**

**PLENARY SESSIONS (AUDITORIUM)**

**09:00 Panel 3 - Implementation of the Global Cocoa Agenda: The Industry's Progress, Challenges and Opportunities (Panel Discussion)**

Moderator: **Mrs. Massandjé Touré-Litsé**, Director General, Conseil Café Cacao, Côte d'Ivoire

*Presentation: CocoaAction: Mr. Bill Guyton*, President, World Cocoa Foundation

Panellists:

- **Mr. Michiel Hendriksz**, Director of Sustainability, ADM International Cocoa Division
- **Mr. Nicko Debenham**, Vice President, Cocoa Sustainability & Managing Director Biolands, Barry Callebaut
- **Mr. Kip Walk**, Corporate Director, Cocoa and Sustainability, Blommer Chocolate
- **Mr. Jos de Loor**, President, Cargill Cocoa and Chocolate
- **Mr. Frank Day**, Vice President of Global Commodities, The Hershey Company
- **Mr. Andy Harner**, Global Cocoa Vice President, Mars Chocolate
- **Ms. Christine Montenegro McGrath**, Vice President External Affairs, Mondelez International

**11:00** *Cocoa Break*

**11:30 Panel 4 - Value distribution from the farm to the chocolate bar (Panel Discussion)**

Moderator: **Mr. Antonie Fountain**, Coordinator, VOICE Network

Panellists:

- **Mr. David Kpelle**, Programme Director, Africa Cocoa Coalition
- **Dr. Victor Iyama**, National President, Agricultural Commodities Association of Nigeria (FACAN)
- **Mrs. Michèle Akamba Ava**, Director of Control of Sale and Quality, ONCC, Cameroon
- **Mr. Arjen Boekhold**, Chain Director, Tony's Chocolonely

**12:30** *Lunch (Exhibition, Hall 3)*

**14:00 Panel 5 - Progress on global efforts to eradicate the worst forms of child labour in the cocoa sector (Panel Discussion)**

Moderator: **Mr. Richard Quest**, Broadcaster and Journalist, Quest for Business, CNN

- *Keynote Presentation: Dr. Martin Kra Nguettia Kouakou*, Director of Fight against Child Labour at the Ministry of State, Ministry of Employment, Social Affairs and Vocational Training and Executive Secretary of the Interministerial Committee for the Fight against child trafficking, exploitation and child labour in Côte d'Ivoire.

Panellists:

- **Mr. Nick Weatherill**, Executive Director, International Cocoa Initiative
- **Mr. Benjamin Smith**, Senior Officer for CSR, International Programme on the Elimination of Child Labour, International Labour Organization
- **Dr. Francis Baah**, Acting Executive Director, Cocoa Health & Extension Division, Ghana Cocoa Board

15:00 **Panel 6 - Beyond Certification: Improving farmer livelihoods by mainstreaming sustainable cocoa** (*Panel Discussion*)

Moderator: **Dr. Jean-Marc Anga**, Executive Director, ICCO

*Introduction by Mr. Christopher Wunderlich*, Coordinator, United Nations Forum on Sustainability Standards

Panellists:

- **Mr. Robert Yapo Assamoi**, Director of Sustainability, Projects and Planning, Conseil Café Cacao, Côte d'Ivoire
- **Dr. Soetanto Abdullah**, Member of the Scientific Board of the Indonesian Coffee & Cocoa Research Institute (ICCRI)
- **Mr. Alastair Child**, Cocoa Sustainability Director – Certification & Community Development, Mars Global Chocolate
- **Ms. Cathy Pieters**, Director, Cocoa Life Program, Mondelēz International

16:00 *Cocoa Break*

16:30 **Panel 7 - Empowering Cocoa Producers by Strengthening Farmer-Based Organizations** (*Panel Discussion*)

Moderator: **Mr. Bertus Wennink**, Senior Advisor, Royal Tropical Institute

*Keynote Presentation by Mr. Nico Roozen*, Executive Director, Solidaridad Network

Panellists:

- **Mr. Alfonzo Baldera German**, CONACADO, Dominican Republic
- **Mr. Eliseus Opoku Boamah**, Executive Secretary, Cocoa Abrabopa Association, Ghana
- **Mr. Taco Terheijden**, Manager, Sustainable Cocoa, Cargill Cocoa and Chocolate

17:30 *End of day's session*

**CONFERENCE DINNER**

**Het Scheepvaartmuseum – The National Maritime Museum 19:30**

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THURSDAY 12 June 2014

**BREAKOUT SESSIONS (AUDITORIUM / EMERALD ROOM / ROOMS G102-G103)**

**Track 1 Sustainable Production: Transforming Cocoa Farming into a Viable Economic Activity**  
(Auditorium)

*The cocoa and chocolate industry has raised concerns that a lack of supply threatens the future of the sector, as productivity has not improved over the years and cocoa farming is not seen as an attractive proposition for the young generation. This session will offer a platform to discuss progress and propose innovative ideas to address this threat, focusing on making the business more financially appealing to farmers.*

Moderator: **Dr. Martin Gilmour** (Research Director, Cocoa Sustainability, Mars Global Chocolate),  
Chairperson of the Working Group on Sustainable Production

*08.30 Moderator's Introduction: Measuring Progress on the Implementation of Global Cocoa Agenda*

*09:00* **Panel 8 - Improving cocoa productivity and quality through an integrated system**

*Presentation by Mr. Jonas Mva Mva*, Cocoa Program Manager, IDH The Sustainable Trade Initiative

Panellists:

- **Mr. Edmond Konan**, President, Global Business Consulting Co, Côte d'Ivoire
- **Mr. Andrés Guzman**, Manager, Hacienda Victoria, Ecuador
- **Mr. Juan Carlos Motamayor**, Global Program Manager, Mars Global Chocolate
- **Mr. Darrell High**, Cocoa Manager, Nestec Ltd / Nestlé
- **Mr. Juan Gonzales Valero**, Head of Public Policy and Partnerships, Syngenta International

*10:30* *Cocoa Break*

*11:00* **Panel 9 - Attracting a new generation of cocoa farmers and addressing gender issues**

*Presentation by Mr. Omer Maledy*, Executive Secretary, CICC, Cameroon

Panellists:

- **Mr. François Ruf**, CIRAD
- **Ms. Gisèle Bilegue Nanga**, Cocoa Farmer, Cameroon
- **Mr. Juan Pablo Buchert**, Chocolate Nahua, Costa Rica
- **Mr. Joseph Bosompem**, Cocoa Farmer, Ghana
- **Mr. Frank Mechielsen**, Policy Advisor, Oxfam Novib

12:00 **Panel 10 - Protecting the diversity of cocoa and the prospects for fine/flavour cocoa**

*Presentation by Ms. Ann Tutwiler, Director General, Bioversity International*

Panellists:

- **Dr. Freddy Amores**, Leader, Cocoa and Coffee Research Program, INIAP , Ecuador
- **Mr. Martin Christy**, Founder Seventy% / Direct Cacao
- **Mr. Philipp Kauffmann**, Founder and CEO, Original Beans
- **Dr. Anna Laven**, Senior Advisor Sustainable Development, Royal Tropical Institute (KIT), The Netherlands
- **Dr Vele Pat Ila'Ava**, Acting Secretary, Department of Agriculture and Livestock, Papua New Guinea

13:00 *Lunch (Exhibition, Hall 3)*

**Track 2 Sustainable Industry Chain: Factors Affecting Farmers' Incomes (Emerald Room)**

*Stakeholders involved in the supply side have been raising the alarm that they do not earn a large enough share of the value of the sector and that this threatens its sustainability, with farmers and their governments now turning to other crops. This session will bring together the various parties involved in the cocoa value chain to review major market constraints and discuss opportunities to create more value at origin.*

Moderator: **Mr. Michiel Hendriksz** (Director of Sustainability, ADM Cocoa), Vice-Chairperson of the Working Group on Sustainable Industry Chain

08.30 *Moderator's Introduction: Measuring Progress on the Implementation of Global Cocoa Agenda*

09:00 **Panel 11 - Improving market efficiency and transparency**

*Presentation by Mr. Samuel K. Gayi, Head, Special Unit on Commodities, UNCTAD*

*Presentation by Dr. Christopher L. Gilbert, Professor of Econometrics, University of Trento*

Panellists:

- **Ms. Francesca Kleemans**, Strategy and Supply Demand Manager, Cargill Cocoa and Chocolate
- **Mr. Paul Hutchinson**, Head of Cocoa Products Trading, Olam Cocoa
- **Mr. Friedel Hütz-Adams**, Cocoa Issues Specialist, Südwind-Institut

10:30 *Cocoa Break*

11:00 **Panel 12 - Adding Value to Cocoa at origin**

*Presentation by Mr. Edward George, Soft Commodities Specialist, Ecobank*

Panellists:

- **Mr. Ricardo Meija-Aristizabal**, Specialist in Sales and Development, Compañía Nacional de Chocolates, Colombia
- **Mr. Edmund Poku**, Managing Director, Niche Cocoa, Ghana
- **Ms. Eliette Milagros Mora Montes**, Manager, Mi Tierra, Nicaragua

**12:00 Panel 13 - Financing the Cocoa Sector**

*Presentation by Mr. Kofi Adomakoh*, Head of Project Finance and Export Development, Afreximbank

Panellists:

- **Mr. Parvinder Singh**, Managing Director, Common Fund for Commodities (CFC)
- **Mr. Dick de Graaf**, Coordinator, Cocoa Steering Committee, European Federation of Food, Agriculture and Tourism Trade Unions (EFFAT)
- **Mr. Lucas Simons**, Founder and CEO, SCOPEInsight

**13:00 Lunch (Exhibition, Hall 3)**

*(Interactive Session: Value Distribution and Living Income—Emerald Room)*

**Track 3 Sustainable Consumption: Trends and Actions in Response (Rooms G102-G103)**

*Demand growth from mature markets is back, but is characterized by more stringent food safety constraints. Appetite for chocolate products in emerging markets is expanding, and origin countries are also looking at opportunities to develop their own local markets. This session will discuss these trends and how they affect the long term supply and demand equilibrium of the cocoa sector.*

Moderator: **Dr. Torben Erbrath**, (Managing Director, BDSI, Association of the German Confectionery Industry), Chairperson of the Working Group on Sustainable Consumption

**08.30 Moderator's Introduction: Measuring Progress on the Implementation of Global Cocoa Agenda**

**09:00 Panel 14 - Managing the supply deficit**

*Presentation by Mr. Laurent Pipitone*, Director of the Economics and Statistics Division, ICCO

Panellists:

- **Mr. Laurent Souron**, Head of Cocoa Research, Armajaro Research Ltd
- **Ms. Lauren Bandy**, Food Analyst, Euromonitor International
- **Mr. Jonathan Parkman**, Joint Head of Agriculture, Marex Financial
- **Mr. Emile Mehmet**, Editor, The Public Ledger

**10:30 Cocoa Break**

11:00 **Panel 15 - Promoting cocoa consumption in emerging markets and origin countries**

*Presentation by Mr. Shi Yuping*, Chairman, Wuxi Huadong Cocoa Food Co, China

Panellists:

- **Mr. Edem Amegashie-Duvon**, Cocoa Trader and Head of Marketing at the Cocoa Marketing Company / Ghana Cocoa Board. (Cocobod)
- **Dr. Soetanto Abdullah**, Member of the Scientific Board of the Indonesian Coffee & Cocoa Research Institute (ICCRI)
- **Dr. Peter Aikpokpodion**, Leader, Cocoa Value Chain Development, Agricultural Transformation, Federal Ministry of Agriculture and Rural Development, Nigeria

12:00 **Panel 16 - Food safety in the cocoa sector: how best to help producers comply and influence legislation?**

*Presentation by Ms. Isabelle Adam*, General Secretary, European Cocoa Association (ECA)

Panellists:

- **Dr Jayne Crozier**, Team Leader / Plant Pathologist, CABI
- **Mr. Chagemama John Kedera**, Regional Coordinator, EDES-COLEACP
- **Dr. Kenza Le Mentec**, Project Coordinator, Standards and Trade Development Facility (STDF), World Trade Organization (WTO)

13:00 *Lunch (Exhibition, Hall 3)*

**PLENARY SESSIONS (AUDITORIUM)**

***Strategic Management: Working together towards a sustainable cocoa economy***

*This session will bring together key parties involved in the preparation of the Conference to discuss the outcome of the various sessions of the event and to agree on how they can better cooperate on specific issues.*

Moderator: **Dr. Jean-Marc Anga** (Executive Director, ICCO) Chairperson of the Working Group on Strategic Management

14.30 **Measuring Progress on the Implementation of Global Cocoa Agenda**

*Moderator's Introduction*

*Panel Discussions:*

- **Improving Coordination in the Cocoa Sector: A Review of Initiatives to Enhance Information and Coordination through Cocoa Databank, CocoaMap and CocoaConnect**
- **Measuring Progress towards the Goals in the Global Cocoa Agenda and identifying the next steps**

Panellists:

- **Dr. Martin Gilmour**, Chair of Working Group for Sustainable Production
- **Mr. Michiel Hendriksz**, Vice-Chair of Working Group for Sustainable Industry Chain
- **Dr. Torben Erbrath**, Chair of Working Group for Sustainable Consumption
- **Mr. Jonas Mva Mva**, Vice-Chair of Working Group for Strategic Management
- **Dr. Anna Laven**, Senior Advisor Sustainable Development, Royal Tropical Institute (KIT) The Netherlands
- **Mr. Steve Farone**, Business Manager, Cocoa Measurement and Progress Initiative, World Cocoa Foundation
- **Mr. Laurent Pipitone**, Director of Economics and Statistics, ICCO

16:30 *Cocoa Break and End of day's session*

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**DAY 4: FRIDAY 13 June 2014**

**PLENARY SESSION (AUDITORIUM)**

**Conclusion of the Conference and Closing Ceremony**

10:30 *Presentation by Mr. Achille Bassilekin*, Assistant Secretary General, Sustainable Economic Development and Trade Department, African, Caribbean and Pacific Group of States (ACP)

11:00 **Adoption of Recommendations – Amsterdam Cocoa Declaration**

11:30 **Closing remarks**

- **Dr. Jean-Marc Anga**, Executive Director, ICCO
- **Official Announcement of the host country, city and provisional dates for the Third World Cocoa Conference in 2016**
- **Mr. Roald Lapperre**, Deputy Director General, Ministry of Economic Affairs, The Netherlands

12:30 *Press Conference*

**ANNEX IV: REGISTERED PARTICIPANTS BY COUNTRIES**

<b>Continent</b>	<b>Country</b>	<b>Participants</b>
Africa	Cameroon	40
	Congo, DR	5
	Côte d'Ivoire	98
	Egypt	3
	Gabon	9
	Ghana	72
	Kenya	1
	Liberia	2
	Madagascar	2
	Morocco	3
	Nigeria	39
	Senegal	2
	Sierra Leone	4
	South Africa	8
	Tanzania	2
	Togo	8
	Uganda	8
Zambia	1	
<b>Africa Total</b>		<b>307</b>
Asia & Oceania	Australia	2
	Bangladesh	2
	China	3
	Georgia	1
	Hong Kong	1
	India	5
	Indonesia	23
	Israel	6
	Malaysia	1
	Papua New Guinea	3
	Philippines	4
	Singapore	7
	Sri Lanka	2
Vietnam	1	
<b>Asia &amp; Oceania Total</b>		<b>61</b>
Europe	Austria	2
	Belgium	104
	Czech Republic	1
	Estonia	2
	Ethiopia	1
	Finland	1
	France	41
	Germany	61
	Ireland	3
	Italy	7
	Luxembourg	2
	Monaco	1
	Netherlands	356
	Norway	1
	Poland	1
	Russia	1
	Spain	13
Sweden	2	
Switzerland	91	
Turkey	5	
United Kingdom	122	
<b>Europe Total</b>		<b>818</b>
Latin America & Caribbean	Brazil	14
	Colombia	10
	Costa Rica	4
	Dominican Republic	6
	Ecuador	19
	Honduras	1
	Netherlands Antilles	5
	Nicaragua	8
	Peru	9
	Trinidad & Tobago	2
Venezuela	1	
<b>Latin America &amp; Caribbean Total</b>		<b>79</b>
North America	United States	58
n.d.	n.d.	91
<b>Grand Total</b>		<b>1414</b>