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Report Name: Cote d'Ivoire Cocoa Beans and Cocoa Products Semi-Annual - Mid-Crop MY 2024-2025 Update

Country: Cote d'Ivoire

Post: Abidjan, Accra

Report Category: Agricultural Situation, Agriculture in the Economy, Agriculture in the News, MISC-Commodity, SP2 - Prevent or Resolve Barriers to Trade that Hinder U.S. Food and Agricultural Exports

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Report Highlights:

FAS Abidjan, Accra (Post) estimates Côte d'Ivoire's market year (MY) 2024/2025 cocoa production at 1.75 million metric tons (MMT), nearly 3 percent off from MY 2023/2024. The Ivorian cocoa sector faces production challenges, limiting its recovery. Côte d'Ivoire's mid-crop cocoa bean production of 500,000 MT is below the 10-year average of 550,000 MT and is evidencing poorer bean quality. There are higher incidences of mold, resulting from elevated moisture levels (i.e., from delayed rains), accompanied by poorer bean fermentation. Cocoa bean exports are expected to rise to 1 MMT nonetheless, while ending stocks are expected to fall to 134,000 MT. The Ivorian government launched the Coffee-Cocoa Agricultural Interprofessional Organization (OIA Café-Cacao) to improve value-chain governance.

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EXECUTIVE SUMMARY

Côte d'Ivoire's cocoa sector is facing challenges in its production and processing of cocoa beans. This, along with the presence of highly virulent cocoa swollen shoot virus disease (CSSVD), drives up production costs - impacting cocoa beans export prices. In market year (MY) 2024/2025 (October-September), Post estimates Ivorian production of cocoa beans dropping to 1.75 million metric tons (MMT), that is, down by 50,000 metric tons (MT) or nearly 3 percent lower than the earlier estimated volume of 1.8 MMT. The production decrease is attributable to adverse weather conditions during the light crop (i.e., mid-crop) or minor cocoa harvest season (April-September); the season counted with prolonged dry spells (i.e., low rainfall) and an unseasonable cold bout.¹ This led to disruption of cauliflory (i.e., cocoa flowering) and pod development post pollination.

Côte d'Ivoire's mid-crop cocoa beans production of 500,000 MT is below the 10-year average of 550,000 MT and is evidencing poorer bean quality. There are higher incidences of mold, resulting from elevated moisture levels (i.e., from delayed rains), accompanied by poorer bean fermentation. While late rains in July-August 2025, provided Ivorian cocoa farmers with a measure of relief, the sector remains challenged. Farmers hope for better results in the MY 2025/2026 main crop season (October-March).

In 2025, Côte d'Ivoire inaugurated two new cocoa processing facilities: 1) TRANS CAO CI, a *Conseil du Café-Cacao* (Coffee Cocoa Council – CCC) (majority-owned, 75 percent) joint venture with GCB Cocoa Singapore PTE Ltd. (a subsidiary of Malaysia's Guan Chong Berhad - GCB) and 2) Cacao SA (Divo, Côte d'Ivoire). The Ivorian government is targeting local processing of 50 percent of cocoa production over the next two-years, crossing a major waypoint towards self-sufficiency by the MY 2027/2028 season. Côte d'Ivoire today processes 42 percent of its cocoa beans locally. The Ivorians envision 100 percent local processing by 2030; to keep cocoa processing value-addition in the country.

Ivorian grinding (i.e., processing) volumes remain vulnerable to supply constraints, as evidenced by the 31 percent year-on-year drop in July 2025. The drop is due to poor quality/deteriorated beans reaching processors, combined with reduced MY 2024/2025 mid-crop volumes. Ivorian cocoa product exports evidence mixed results, with cocoa paste exports down nearly 9 percent. Cocoa butter and cocoa powder exports are down 6 percent and 11 percent. However, MY 2024/2025 Ivorian global exports of chocolate and other food preparations containing cocoa (HS 1806) were 2 percent up year-on-year. These trends indicate a shift in global demand in tandem with bean availability impacting exports.

The Coffee-Cocoa Agricultural Interprofessional Organization's (*L'Organisation Interprofessionnelle Agricole de la Filière Café-Cacao* – OIA-Café-Cacao) launch on August 19, 2025, aims to improve the cocoa sector's governance.² It seeks to better representation and address coordination gaps.

¹ The minor crop is referred to as the “mid-crop,” while the International Cocoa Organization (ICCO) calls it the “light crop.”

² The Coffee-Cocoa Agricultural Interprofessional Organization (*L'Organisation Interprofessionnelle Agricole de la Filière Café-Cacao* – OIA-Café-Cacao) is led by a technical committee; funding derives from the Coffee Cocoa Council (CCC). The organization lacks a standalone website; information is available at the CCC's <http://www.conseilcafecacao.ci/> with pages located at http://www.conseilcafecacao.ci/index.php?option=com_content&view=article&id=111&Itemid=184 and at http://www.conseilcafecacao.ci/index.php?option=com_content&view=article&id=112&Itemid=186.

COMMODITY

COCOA

Table 1. Côte d'Ivoire: Commodity, Cocoa, Production, Supply, and Distribution (PSD)

| Cocoa | 2022/2023 | 2023/2024 | 2024/2025 |
|---|---------------------|---------------------|---------------------|
| Market Year Begins | October 2022 | October 2023 | October 2024 |
| Côte d'Ivoire | Post | Post | Post |
| Area Planted (1000 HA) | 4,715 | 4,792 | 4,800 |
| Area Harvested (1000 HA) | 4,385 | 4,457 | 4,464 |
| Bearing Trees (Millions) | 4,385 | 4,457 | 4,464 |
| Non-Bearing Trees (Millions) | 487 | 495 | 496 |
| Total Tree Population (Millions) | 4,872 | 4,952 | 4,960 |
| Beginning Stocks (1000 MT) | 280 | 343 | 125 |
| Cocoa Bean Production (1000 MT) | 2,300 | 1,760 | 1,750 |
| Cocoa Bean Imports (1000 MT) | 0 | 0 | 0 |
| Cocoa Paste Imports (1000 MT) | 0 | 0 | 0 |
| Butter, Fat & Oil imports (1000 MT) | 0 | 0 | 0 |
| Cocoa Powder Imports (1000 MT) | 0 | 0 | 0 |
| Choc. & Others Imports (1000 MT) | 2 | 2 | 2 |
| MY Total Bean & Prods. Imports (1000 MT) | 2 | 2 | 2 |
| Total Supply (1000 MT) | 2,582 | 2,105 | 1,877 |
| Cocoa Bean Exports (1000 MT) | 1,444 | 1,233 | 1,058 |
| Cocoa Paste Exports (1000 MT) | 370 | 390 | 353 |
| Butter, Fat & Oil Exports (1000 MT) | 141 | 132 | 140 |
| Cocoa Powder Exports (1000 MT) | 27 | 22 | 19 |
| Choc. & Other Food Preps. Exports (1000 MT) | 58 | 48 | 49 |
| MY Total Bean & Prods. Exports (1000 MT) | 2,040 | 1,825 | 1,598 |
| Domestic Grindings (1000 MT) | 795 | 747 | 685 |
| Domestic Consumption (1000 MT) | 25 | 25 | 25 |
| Ending Stocks (1000 MT) | 343 | 125 | 134 |
| Total Distribution (1000 MT) | 2,582 | 2,105 | 1,877 |
| Yield (MT/HA) | 0.52 | 0.39 | 0.39 |
| (1000 HA), (1000 MT), (MT/HA) | | | |
| MY = Market Year, begins with the month listed at the top of each column. | | | |

Source: FAS Abidjan, Accra office research.

PRODUCTION

FAS Abidjan, Accra (Post) is revising the earlier Côte d'Ivoire market year (MY) 2024/2025 (October-September) cocoa bean production volume to 1.75 million metric tons (MMT), pushing it down by 50,000 metric tons (MT) or 3 percent lower from the earlier estimate of 1.8 MMT (see, [GAIN-CÔTE D'IVOIRE | IV2025-0001 | Côte d'Ivoire – Cocoa Sector Overview - 2025](#)).³ The production decrease is attributable to the impact of adverse weather conditions during the mid-crop (minor) season (April-September); that included a combination of prolonged dry spells (i.e., low rainfall) with unseasonable

³ U.S. Department of Agriculture (USDA)/Foreign Agricultural Service (FAS) – Abidjan, Accra, “GAIN-CÔTE D'IVOIRE | IV2025-0001| Côte d'Ivoire – Cocoa Sector Overview – 2025,” located at: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Cote%20d%27Ivoire%20-20Cocoa%20Sector%20Overview%20-%202025_Accra_Cote%20d%27Ivoire_IV2025-0001.

cold weather.⁴ These disrupted cauliflory (i.e., cocoa flowering) and pod development post pollination. Rain arriving later in July-August 2025, provided farmers with a measure of relief, but the sector remains challenged by the widespread presence of cocoa swollen shoot virus disease (CSSVD).⁵

The Ivorian MY 2024/2025 mid-crop harvest season (April-September 2025) sees production of cocoa beans arriving at 500,000 MT, which is below the 10-year average of 550,000 MT. It came in with noticeable declines in bean quality. Post sources report higher incidences of mold impacting the crop; a consequence of too high moisture levels (i.e., rain at the wrong time), with pods remaining on the trees for longer than usual coupled with poor bean fermentation following pod harvesting.

From November 2024 through March 2025, there have been prolonged spells of inadequate rainfall, disrupting the cocoa crop's flowering and pod development (i.e., ultimately leading to the production of small, poorly filled beans with lower-than-normal fat content) occurring in several of Côte d'Ivoire's main cocoa-production regions. With flowering delayed later than usual, only occurring well into the late March-April 2025 period, subsequent pod development was delayed. Post observed cocoa pod development resuming only after more adequate rains returned later that July-August. However, rains' late arrival pushed back the mid-crop harvest peak into later in the season. Farmers across key cocoa-growing areas, at the same time, have reported unseasonable cold weather during the months of June and July, accompanied by below-average rainfall. This rare weather occurrence raised concerns with the cocoa crop's development, highlighting potential lower yields for the MY 2024/2025 mid-crop season.

Post sources inform us that Ivorian cocoa bean farmers, facing constrained productive output, opted to harvest sprouted or even under-fermented beans. This was a significant cause of the mid-crop season's quality challenges. In-country cocoa bean grinders, working with the Professional Grouping of Coffee and Cocoa Exporters of Côte d'Ivoire ([*Groupement Professionnel des Exportateurs de Café et de Cacao de Côte d'Ivoire – GEPEX*](#)), have raised concerns with the increase in broken beans arriving at processing units; which has necessitated additional sorting and processing to meet market standards.⁶

Poor Growing Conditions, the Financial Impact: While late rains in July-August provided some relief, they were nonetheless insufficient to offset the financial losses that some farmers were already incurring. As the September seasonal break commenced, cocoa trees remain noticeably stressed, with better yields unlikely to return this MY 2024/2025 season. Farmers nevertheless remain cautiously optimistic for the future. These hope for rainfall to normalize by the end of the upcoming dry season; accompanied by improved growing conditions during the next MY 2025/2026 main crop (October-

⁴ The season's minor crop is commonly referred to as the "mid-crop," whereas the International Cocoa Organization (ICCO) refers to it as the "light crop."

⁵ Cocoa swollen shoot virus disease (CSSVD) (*Badnavirus etainflatheobromae*), since first detected in eastern Côte d'Ivoire in 1940s, is now present in most of the country's cocoa growing regions and particularly in the central-west and western parts of the country. Major hotspot areas include Doba (i.e., in the San-Pédro region, that houses the Port of San-Pédro which is considered the world leader in the export of cocoa beans), Haut-Sassandra, Marahoué, Gbôklé, Gôh, and Nawa.

⁶ See, Reuters, "Ivory Coast Cocoa Grind Down 31.2% Year-on-Year in July, Exporters Association Says," located at: <https://www.reuters.com/world/africa/ivory-coast-cocoa-grind-down-312-year-on-year-july-exporters-association-says-2025-08-18/>. Professional Grouping of Coffee and Cocoa Exporters of Côte d'Ivoire (*Groupement Professionnel des Exportateurs de Café et de Cacao de Côte d'Ivoire – GEPEX*) website, located at: <http://www.gepex.org/> is not currently reachable; its contact information, however, is available through CORIACE Business, located at: https://coriacebusiness.com/corporate/GEPEX_ruMzxWcD/index.php?pf=842&apv=pfe.

March) season. If so, there exists the possibility of a measure of improvement for Ivorian cocoa beans production and quality.

Poor Farm Gate Cocoa Beans Pricing Fuels Unregistered and Unlicensed Cross-Border Trade: At year's end 2024, international cocoa prices were then exceptionally high. Nonetheless, Côte d'Ivoire's farm gate pricing of West African CFA franc (XOF) 1,800/kilogram (kg) (~\$2.88/kg) was at that point significantly lower than what cocoa beans would fetch through farmers engagement in the unregistered and unlicensed cross-border trade.⁷

The Ivorian Government Reacts, Raising Farm Gate Prices to Combat the Unregistered and Unlicensed Cross-Border Trade: On April 2, 2025, the Ivorian government raised its farm gate price to XOF 2,200/kg (~\$3.65/kg), with two main impacts on the Ivorian cocoa sector. First, it increased farmers' income by XOF 400/kg (~\$0.66/kg), bettering farmers' confidence for managing the lean season and facilitating investment in small-scale drying equipment. Second, the higher price offered gave farmers the incentive to sell their limited crop volume through formal channels. With record-high official prices being offered, the appeal for engaging in the informal trade sector wanes. Higher farm gate prices being paid out, result in an uptick in weekly cocoa beans arrivals at the country's cocoa export ports (i.e., San-Pédro and Abidjan) in June-July 2025; these had nearly shuttered their cocoa operations during the April-May period.

Ivorian Government Sets High Farm Gate Price for MY 2025/2026: On October 1, 2025, the Ivorian government set its MY 2025/2026 cocoa beans farm gate pricing at XOF 2,800/kg (~\$5.00); higher than the anticipated XOF 2,500 (~\$4.46). This record high price is 56 percent higher than the preceding MY 2024/2025 farm gate price of XOF 1,800 (~\$3.21); and at the same time, it is 27 percent better than the mid-crop price of XOF 2,200 (~\$3.93). The Ivorian government is seeking to improve farmers' income, encourage official cocoa sales, and reduce the share of cocoa beans being sold through informal or unregulated channels. However, a sharp price increase may still stimulate the unregistered and unlicensed cross-border trade, as traders seek to profit from price gaps with neighboring countries. Ghana raised its own farm gate price by about 12 percent to keep its own producers competitive, aiming to limit flow of unregistered and unlicensed cocoa movements across the shared border.

CONSUMPTION

Domestic Grinding and Consumption: FAS Abidjan, Accra is reducing Côte d'Ivoire's estimated MY 2024/2025 cocoa bean domestic grinding (i.e., processing) to 685,000 MT, dropping it by 115,000 MT or 14 percent lower, than the earlier estimate of 800,000 MT. The drop is attributable to supply constraints, namely tighter bean availability and quality issues affecting grinding operations (including the fouling of equipment) at several processing plants. Post is also updating the MY 2023/2024 domestic cocoa bean grinding figure to 747,000 MT, down 30,000 MT, or about 4 percent lower from the earlier projection of 777,000 MT. The lower figure is due to the combination of limited bean supplies and delayed deliveries to processing plants towards the end of the marketing year. The Ivorian government is nonetheless prioritizing scaling up domestic cocoa processing as part of its broader economic strategy.

⁷ The XOF is the currency code for the West African CFA franc, which is the official currency of eight countries in West Africa form part of the West African Economic and Monetary Union (WAEMU). The West African CFA franc (XOF) is used by Benin, Burkina Faso, Côte d'Ivoire, Guinea-Bissau, Mali, Niger, Senegal, and Togo. It is regulated by the Central Bank of West African States (BCEAO). The XOF has a fixed exchange rate pegged to the euro at 1 euro = 655.957 XOF.

In 2025, the Côte d'Ivoire inaugurated two new cocoa bean processing facilities: 1) [TRANSCAO CI](#), a [Conseil du Café-Cacao \(Coffee Cocoa Council – CCC\)](#) (majority-owned, 75 percent) joint venture with [GCB Cocoa Singapore PTE Ltd](#) (a subsidiary of Malaysia's Guan Chong Berhad - GCB) and 2) Cacao SA (Divo, Côte d'Ivoire).⁸ The Ivorian government is targeting local processing of up to 50 percent of the country's production of cocoa beans over the next two-years (i.e., by MY 2027/2028). Côte d'Ivoire today already processes 42 percent of its cocoa beans domestically. The Ivorian government envisions 100 percent local processing by 2030; aiming to keep processing value-addition within the country.

Despite these advancements, the sector remains vulnerable to supply constraints. In July 2025, cocoa grinding volumes fell sharply, dropping 31 percent year-on-year to just 39,301 MT, according to GEPEX data.⁹ Ivorian cocoa grinders attribute the decline to deteriorated bean quality and reduced mid-crop volumes, underscoring the overall fragility of the cocoa bean processing value-chain and the challenges associated with maintaining consistent bean quality. For the international cocoa processors operating in Côte d'Ivoire, these issues highlight the need for continued investment in quality control, as well as building up supply chain resilience at a time when the Ivorian government is pursuing its march to achieve self-sufficiency in cocoa bean processing in the short-term.

TRADE

Export Trade by Volume (with the World): Côte d'Ivoire's MY 2024/2025 cocoa bean and products exports generally declined. Exports of cocoa beans (HS 1801 – whole or broken, raw or roasted) to the world, stand at over 1.05 MMT, down by nearly 4 percent from the 1.10 MMT figure projected earlier in the season. Likewise, Côte d'Ivoire's other cocoa products exports are not faring well. For example, cocoa paste (HS 1803 – cocoa paste, whether or not defatted) exports are down by over 9 percent year-on-year, dropping from 390,000 MT to roughly 353,000 MT. Post attributes the drop in export volume to a shortage of cocoa beans for domestic grinding combined with reduced processing activity.

Similarly, MY 2024/2025 Ivorian cocoa butter (HS 1804 – fat and oil) global exports of 131,000 MT, are down 6 percent from the earlier projected volume of 140,000 MT. Post observes enduring strong demand for Ivorian cocoa butter emanating from the Netherlands, France, the United Kingdom, and Germany. Ivorian cocoa powder (HS 1805 – cocoa powder not containing added sugar or other sweetening matter) exports, likewise, declined to 19,323 MT, down about 11 percent year-on-year. Nevertheless, Côte d'Ivoire's global exports of chocolate and other food preparations containing cocoa (HS 1806), at 49,291 MT were nearly 2 percent up year-on-year.¹⁰

⁸ The TRANSCAO CI is a cocoa-processing company established by the *Conseil du Café-Cacao*, Côte d'Ivoire's national cocoa management body. See, TRANSCAO CI, located at: www.transcaonegoce.ci. Côte d'Ivoire's *Conseil du Café-Cacao* (Coffee Cocoa Council – CCC), is located at: <http://www.conseilcafecacao.ci/>. The GCB Cocoa Singapore PTE Ltd., is located at: <https://www.gcbcocoa.com/>. Cacao SA (Divo, Côte d'Ivoire) does not currently count with a dedicated, independent website. Reports indicate that the company is a new local Ivorian processing factory, which was just inaugurated in August 2025.

⁹ GEPEX data covers six of the largest grinding companies operating in Côte d'Ivoire, including Cargill, OLAM, and Barry Callebaut. Other international and local processors operating Côte d'Ivoire include: CEMOI (France), chocolate maker; Touton (France) cocoa trader; SUCDEN (France) cocoa trader; TRANSCAO (Côte d'Ivoire) cocoa processor; GCB Cocoa (Malaysia) cocoa processor; *Compagnie Cacaoyère du Bandama* (CCB) (Côte d'Ivoire), subsidiary of EUROFIND Participation, cocoa processor; Ivoire Cocoa Products (ICP) (Côte d'Ivoire) cocoa processor; and *Société de Commercialisation de Café et de Cacao* (S3C) (Côte d'Ivoire) cocoa trader and investing with Touton to build a new grinding plant.

¹⁰ This current update makes use of derived exports data from the Trade Data Monitor LLC, 2025, which indicates a more accurate estimate of the referenced trade data instead of the direct exports data as reported by Côte d'Ivoire used in the

Export Trade by Volume (with the United States): Côte d'Ivoire's exports of cocoa beans and cocoa products to the United States dominate the U.S.-Côte d'Ivoire bilateral food and agricultural products trade relationship. Ivorian exports to the United States of cocoa beans (HS 1801) in MY 2024/2025 of 79,400 MT, are marginally down less than 1 percent compared to the 79,864 MT registered during that same period in MY 2023/2024. Ivorian exports of cocoa paste (HS 1803) to the United States, however, stumbled by nearly 18 percent, dropping from 78,904 MT to 64,885 MT. During the same period, Ivorian exports of cocoa butter (HS 1804) to the United States were up. Post sees cocoa butter, fat and oil exports skyrocketing over 920 percent; going from a low of 646 MT in MY 2023/2024 to 6,616 MT in MY 2024/2025.

FAS Abidjan, Accra simultaneously observe significant drops in Ivorian exports to the United States of cocoa powder (HS 1805 - cocoa powder not containing added sugar or other sweetening matter).¹¹ Exports of semi-processed cocoa powder in the MY 2024/2025 season plummet from 897 MT to a low of 590 MT, falling by 34 percent compared to the preceding market year. The drop is widely attributed to the arrival of poor-quality cocoa beans; that has forced a reduction in cocoa grinding activity. For example, the month of July 2025 witnessed cocoa grinding activity stumbling by 31 percent year-on-year. This occurrence bodes poorly for the MY 2024/2025 season. Reduced cocoa bean grindings/processing, along with limited supplies of quality cocoa beans, is forcing Ivorian processors to prioritize their other cocoa products for export this MY 2024/2025 season. Similarly, MY 2024/2025 Ivorian chocolate and other food preparations containing cocoa (1806) exports are down 32.5 percent to 5,221 MT compared to 7,739 MT recorded in the preceding year.

Export Trade by Value (with the World): FAS Abidjan, Accra estimates Côte d'Ivoire's cocoa bean (HS 1801) exports in MY 2024/2025 at \$8.95 billion, up 61 percent compared to the preceding year's value of \$5.6 billion. Similarly, Ivorian exports of cocoa paste (HS 1803) and of cocoa butter (HS 1804) are showing significant improvement. Ivorian cocoa paste exports in MY 2024/2025, estimated at a hefty \$2.99 billion, are up 61 percent compared to the MY 2023/2024 season's \$1.86 billion figure.

Correspondingly, Ivorian global exports of cocoa butter (HS 1804) in MY 2024/2025 of \$1.74 billion, are up 96 percent from the MY 2023/2024 season's figure of \$885.6 million. Also, Ivorian cocoa powder (HS 1805) exports in MY 2024/2025 of \$137.1 million, are up 64 percent from the MY 2023/2024 season's \$83.5 million export level. The Netherlands alone is absorbing an estimated \$92 million (67percent) of Côte d'Ivoire's MY 2024/2025 cocoa powder exports. Gains in export value terms throughout MY 2024/2025 are occurring despite the season's mid-crop's arrival of poorer-quality cocoa beans. Bean quality has suffered significantly from widespread crop disease; resulting from the proliferation of cocoa swollen shoot virus disease and brown rot fungus, along with inventory depletion.

Export Trade by Value (with the United States): FAS Abidjan, Accra estimates Ivorian cocoa bean (HS 1801) exports to the United States in MY 2024/2025 at \$684 million, up over 113 percent from the MY 2023/2024 figure of \$321 million. Big spikes in Ivorian exports values are also seen taking place with cocoa paste (HS 1803) and cocoa butter (HS 1804). Ivorian cocoa paste exports to the United States

previous edition of this report, located at:

https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Cote%20d%27Ivoire%20%20Cocoa%20Sector%20Overview%20-%202025_Accra_Cote%20d%27Ivoire_IV2025-0001.

¹¹ Cocoa powder (HS 1806.10 cocoa powder containing added sugar or other sweetening matter), that falls within the consumer-oriented grouping chocolate and cocoa products).

in MY 2024/2025 are estimated at \$540.6 million, up 56 percent compared to the MY 2023/2024 figure of \$346.1 million. Ivorian cocoa butter (HS 1804) exports to the United States in MY 2024/2025 at \$115.86 million, are up 2,365 percent compared to the MY 2023/2024 figure of \$4.7 million.

FAS Abidjan, Accra observed a significant rise in Ivorian exports of cocoa powder (HS 1805) to the United States in MY 2024/2025, by 55 percent to an estimated \$4.36 million, from the MY 2023/2024 figure of \$2.81 million. Nonetheless, the MY 2024/2025 mid-crop harvest, with its massive shortage of higher-quality cocoa beans, has forced cocoa processors to scale back on grinding operations; reducing the availability of semi-processed cocoa powder for export. Ivorian cocoa processors are strategically prioritizing exports to the larger Netherlands uptake market over the smaller U.S. market.

STOCKS

FAS Abidjan, Accra is revising Côte d'Ivoire's MY 2024/2025 cocoa bean ending stocks number upwards by 7,000 MT to 134,000 MT, representing growth of 7 percent over the preceding year's estimate of 125,000 MT. Post attributes this modest increase to cocoa beans slower export pace; the consequence of reduced domestic cocoa beans for grinding amid tightening of bean supply and quality challenges. While the overall production of cocoa beans is projected lower, subdued domestic grinding activity along with logistical delays at the Ivorian export ports of San Pédro and Abidjan, are expected to leave a marginally higher carry-over into MY 2025/2026. This adjustment underscores the ongoing pressure exerted on the availability of high-quality beans, as a larger share of cocoa beans arrivals are being rejected or diverted due to grading concerns.

POLICY

Launch of the Coffee-Cocoa Agricultural Interprofessional Organization: On the policy front, the launch of the Coffee-Cocoa Agricultural Interprofessional Organization (*L'Organisation Interprofessionnelle Agricole de la Filière Café-Cacao – OIA-Café-Cacao*) on August 19, 2025, marks a step forward in improving governance in the cocoa sector. The OIA aims to ensure balanced representation across the value-chain and address longstanding coordination gaps.

Unregistered and Unlicensed Cross-Border Trade: The Ivorian government's widely reported efforts to combat the unregistered and unlicensed cocoa trade are intensifying, with stricter enforcement measures and the suspension of officials accused of collusion with traffickers. This action is meant to underscore the Ivorian government's commitment to protecting the integrity of the formal cocoa trade, while navigating the complexities of stakeholder dynamics and cross-border challenges.

Attachments:

No Attachments.