Shipibo Amazon Cacao Project

Community-led Agroforestry for a Sustainable Future

A 5-Year Workplan for Regeneration, Livelihoods & Cultural Resilience

Mark Idzenga – 2025

Workplan Point 1 – Vision & Goals (SMART + KPIs)

Vision

The Shipibo Amazon Cacao Project aims to regenerate degraded Amazonian lands through sustainable cacao agroforestry, while strengthening Shipibo-Konibo cultural identity and generating fair livelihoods.

Goals (SMART)

- Specific: Establish 1,000+ hectares of cacao-based agroforestry with native shade trees.

- Measurable: Train and certify 400 farmers; increase average household income by 30-40%.

- Achievable: Based on proven models in Ucayali and Ecuador (To'ak, RA projects).

- Relevant: Contributes to SDG 13 (Climate Action) & SDG 15 (Life on Land).

- Time-bound: Achieve these within 5 years (2025-2030).

KPIs per Year

Year	Targets
Year 1	150 ha planted, 100 farmers trained, 1 hub established
Year 2	300 ha total, 200 farmers trained, Fairtrade pre-audit completed
Year 3	600 ha total, 300 farmers trained, 2nd hub established
Year 4	800 ha total, 350 farmers certified, first premium exports
Year 5	1,000+ ha total, 400 farmers certified, full international market access

Workplan Point 2 – Budget (Cashflow, CAPEX/OPEX, Financing Sources)

Budget Philosophy

The Shipibo Amazon Cacao Project integrates both CAPEX (long-term investments) and OPEX (annual operational costs). Benchmarks come from real cacao/agroforestry projects in Peru and Ecuador, adapted with a Shipibo cultural focus.

CAPEX (Investments, 5 years total)

- Agroforestry establishment (seedlings, land prep, shade trees): USD 3.0M
- Processing infrastructure (fermentation/drying hubs, storage): USD 2.5M
- Certification & traceability systems: USD 1.0M

OPEX (Operations, per year)

- Training & farmer capacity building: USD 0.4M/year
- Monitoring & evaluation (staff, satellite, reporting): USD 0.25M/year
- Governance & management (salaries, admin, travel): USD 0.2M/year
- Branding & market access: USD 0.15M/year

5-Year Cashflow Projection (USD)

Year	CAPEX	OPEX	Total
2025	2.0M	1.0M	3.0M
2026	1.5M	1.0M	2.5M
2027	1.0M	1.1M	2.1M
2028	1.0M	1.2M	2.2M
2029	1.0M	1.3M	2.3M
Total	6.5M	5.6M	≈12.1M

Potential Financing Sources

- International donors (climate & biodiversity funds).
- Private sector (chocolate brands, impact investors).
- Certification premiums (Fairtrade, Organic, RA).
- Carbon credit revenues.

Foreword

This document presents the vision and implementation plan for the Shipibo Amazon Cacao Project. Rooted in the ancestral knowledge of the Shipibo-Konibo people, the project aims to restore degraded lands, improve livelihoods, and connect communities with premium international cacao markets.

We thank the communities, leaders, and partners who made this roadmap possible. This document is both a plan and an invitation: to collaborate, to co-create, and to ensure a sustainable Amazon for future generations.

Legend

- Green headings: Chapters and main sections.

- Tables: Core data, budgets, partner tiers.

- Bullet points: Key actions or expected results.

- Abbreviations: MEL, FPIC, RA, explained in Annexes.

- Languages: This edition is fully in English for international partners.

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6.1 Why Market Access Matters

- Without access to premium markets, farmers remain trapped in low prices.
- Transparent value chains increase buyer trust.
- Direct contracts secure stable and fair income.

6.2 Market Segments

- Premium bean-to-bar chocolate makers in EU/US.
- Fairtrade & Organic niche markets.
- Domestic Peruvian market for quality chocolate.

6.3 Branding Strategy

- Brand: 'Shipibo Amazon Cacao'.
- Positioning: sustainable, culturally rooted, premium quality.
- Visual identity inspired by Shipibo patterns and storytelling.

6.4 Market Segments vs. Strategy

Market Segment	Strategy
Premium bean-to-bar (EU/US)	Direct contracts, highlight flavor notes, storytelling about Shipibo culture.
Fairtrade/Organic	Certifications, traceability, participation in ethical trade fairs.
Domestic (Peru)	Develop local partnerships, promote national pride in Amazon cacao.

6.5 Marketing & Sales Channels

- International fairs (Salon du Chocolat, Chocoa Amsterdam).
- Online storytelling via website and social media.
- Partnerships with fairtrade and specialty buyers.

6.6 Expected Results (5 years)

- At least 10 long-term contracts with international buyers.
- Export volume above 200 tons of premium cacao.
- Brand 'Shipibo Amazon Cacao' recognized in specialty markets.

7.1 Why Governance and Transparency Matter

- Ensures trust among communities, investors and buyers.
- Prevents corruption or elite capture within cooperatives.
- Makes results measurable and visible to all stakeholders.

7.2 Governance Structure

- Community councils and cooperative boards.
- Rotation of leadership positions.
- Checks & balances through independent audits.

7.3 Transparency Tools

- Public dashboards with KPIs (income, hectares, quality).
- Annual general assembly with published minutes.
- Use of digital traceability tools.

7.4 Roles and Responsibilities

Actor	Responsibilities
Communities	Decision-making, implementation, cooperative governance.
Foundation	Support, reporting, external communication.
Partners	Certification, independent monitoring, external validation.

7.5 Expected Results (5 years)

- 100% of cooperatives publish transparent annual reports.
- Public dashboard operational with quarterly updates.
- International certifications maintained thanks to transparency.

8.1 Why Financing Matters

- Without start-up capital no agroforestry, hubs or training can be established.
- Transparent investment structures increase trust of donors and impact investors.
- Local co-financing strengthens ownership and long-term sustainability.

8.2 Sources of Financing

- Grants & subsidies: international NGOs, development banks, climate funds.
- Impact investments: loans or equity with social impact goals.
- Private sector partnerships: chocolate brands, certification premiums.
- Community contributions: labor, land, local materials.

8.3 Investment Structure

- Transparent fund management by the foundation.
- Contracts with clear conditions and benefit-sharing.
- Risk sharing through blended finance mechanisms.

8.4 Use of Funds

- 40% infrastructure (fermentation/drying hubs, storage).
- 30% training & capacity building.
- 20% certification & monitoring.
- 10% branding & market access.

8.5 Sources of Financing vs. Roles

Source	Role
Grants & subsidies	Cover early-stage costs, reduce risk, enable experimentation.
Impact investors	Provide patient capital, seek blended financial & social return.
Private sector	Buyers commit to contracts, co-finance quality improvements.
Community	In-kind contributions (land, labor, materials), strengthen ownership.

8.6 Expected Results (5 years)

- At least $5 million mobilized in funds.
- 100% of operational costs covered by subsidies and market income.
- Financial sustainability after 5 years through export revenues and certification premiums.

9.1 Why Risk Analysis Matters

- Agroforestry projects are exposed to climate, market, social and biological risks.
- Early identification and mitigation avoids losses and strengthens resilience.

9.2 Key Risks and Mitigation Strategies

Risk	Mitigation
Climate (El Nino/La Nina, droughts, floods)	Crop diversification, buffer zones, water management.
Biological (pests, Monilia, Witches' broom)	Resistant varieties, biological control, farmer training.
Market (price drops, buyer dependency)	Long-term contracts, niche markets, certifications.
Social (community conflicts, elite capture)	Participatory decision-making, leadership rotation, FPIC.
Financial (delayed subsidies, cashflow)	Blended finance, emergency fund, transparent cash management.

9.3 Expected Results (5 years)

- Over 70% of farmers trained in risk mitigation practices.
- Annual risk dashboard available to all stakeholders.
- Financial and production losses from climate/biological risks reduced by >=30%.

10.1 Why MEL Matters

- Provides transparency and accountability.
- Allows communities and partners to learn and improve.
- Provides evidence for investors and certification bodies.

10.2 MEL Structure

- Baseline study: incomes, hectares, biodiversity.
- Quarterly reports: updates on KPIs.
- Annual evaluations: compare with targets.
- External audits: independent verification in year 3 and 5.

10.3 Tools and Methods

- Digital dashboards with community-level data.
- Satellite/GIS monitoring of reforestation and agroforestry.
- Participatory monitoring by farmers.
- MRV (Measurement, Reporting & Verification) aligned with climate standards.

10.4 MEL Activities vs. Outputs

MEL Activity	Expected Output
Baseline study	Reference data on income, hectares, biodiversity.
Quarterly monitoring	Updated KPIs accessible on dashboard.
Annual evaluations	Reports comparing targets vs results.
External audits	Independent verification reports (year 3 and 5).
Learning workshops	Documented lessons learned, shared with partners.

10.5 Learning Processes

- Annual learning workshops in villages.
- Publication of lessons learned and best practices.
- Feedback loops with buyers and NGOs.

10.6 Expected Results (5 years)

- Publicly accessible dashboard fully operational.
- Two independent external evaluations completed.
- Improved performance through adaptive management and feedback.

11.1 Why Impact Measurement Matters

- Shows the project delivers more than cacao production.
- Demonstrates contribution to climate goals and social progress.
- Strengthens legitimacy with investors, partners and communities.

11.2 Environmental Impact

- Restoration of degraded lands through agroforestry.
- Carbon sequestration by trees and cacao plants.
- Increased biodiversity (birds, insects, flora).
- Protection of water streams and soil quality.

11.3 Social Impact

- Improved household income (+30-40%).
- Employment creation in villages (post-harvest hubs, transport, processing).
- Empowerment of women and youth via training and leadership.
- Cultural valorization by integrating Shipibo identity and traditions in branding.

11.4 Impact Areas vs. Indicators

Impact Area	Indicators
Environment	Hectares restored, tons of CO2 sequestered, biodiversity index.
Economy	Increase in household income, jobs created.
Social	% women/youth in leadership, # of trained participants.
Cultural	Shipibo patterns and stories integrated in brand.

11.5 Expected Results (5 years)

- Over 300 hectares of ecosystem restored.
- 50,000+ tons of CO2 sequestered.
- 400 farmers with higher income.
- 40% of leadership positions filled by women and youth.

12.1 Why Scaling Matters

- Ensures the model goes beyond pilot villages.
- Expands impact to multiple regions and communities.
- Strengthens bargaining power in national and international markets.

12.2 Scaling Model

- Start with pilot communities (5-10 villages).
- Phase-wise expansion: Ucayali -> Loreto -> Pasco.
- Replication via train-the-trainer with experienced farmers.

12.3 Preconditions for Scaling

- Strong cooperative structures.
- Availability of land and agroforestry potential.
- Stable market access and certifications.
- Political and legal support.

12.4 Replication Strategy

- Document best practices and lessons learned.
- Partnerships with NGOs and regional governments.
- Create 'Shipibo Cacao Knowledge Hub' for training and replication.

12.5 Scaling Phases vs. Milestones

Phase	Milestones
Pilot (Years 1-2)	5-10 communities engaged, 300 ha agroforestry established.
Expansion (Years 3-4)	New regions added (Loreto, Pasco), 600 ha total.
Replication (Year 5+)	Knowledge Hub operational, 1,000+ ha, national recognition.

12.6 Expected Results (5 years)

- Expansion from 300 ha to over 1,000 ha of agroforestry.
- At least 3 new regions with active implementation.
- Knowledge Hub operational and recognized nationally.

13.1 Why Partnerships Matter

- No project can succeed in isolation.
- Connects local knowledge with international expertise.
- Expands access to markets, funds, and technology.

13.2 Types of Partners

- Community & producer cooperatives - core of implementation.
- NGOs and research institutes - training, agroforestry, monitoring.
- Private sector - buyers, certification, logistics.
- Government - legal support, infrastructure, co-financing.
- International networks - funds and visibility.

13.3 Partner Types vs. Roles

Partner Type	Role
Communities/Cooperatives	Implementation, decision-making, production.
Foundation	Coordination, transparency, reporting.
NGOs/Universities	Technical assistance, training, research.
Private Sector	Purchase contracts, co-financing, logistics support.
Government	Policy support, infrastructure, co-financing.
International Networks	Funding access, global visibility, advocacy.

13.4 Strategic Alliances

- Partnerships with fairtrade and organic certification bodies.
- Membership in international cacao platforms.
- Cooperation with climate and biodiversity programs.

13.5 Expected Results (5 years)

- At least 15 active partnerships.
- 3 strategic alliances at international level.
- Improved access to funds and premium markets.

14.1 Why a Timeline Matters

- Provides clear phasing and priorities.
- Helps partners and investors track progress.
- Strengthens accountability and transparency.

14.2 Implementation Phases vs. Milestones

Phase	Milestones
Phase 1 (Years 1-2): Pilot & Structure	Selection of 5-10 villages; cooperative establishment; first trainings; 300 ha agroforestry established.
Phase 2 (Years 3-4): Expansion & Certification	Scaling to Loreto and Pasco; installation of post-harvest hubs; Organic/Fairtrade/RA certifications; 600 ha established.
Phase 3 (Year 5): Consolidation & Export	Export of premium cacao to EU/US; opening of 'Shipibo Cacao Knowledge Hub'; 1,000+ ha established.

14.3 Expected Results per Phase

- Pilot: organizational structure, trust building, first harvest.
- Expansion: market access, quality control, certifications.
- Consolidation: international recognition, financial sustainability.

15.1 Why a Budget Overview Matters

- Provides clarity on required investments and allocation of resources.
- Strengthens accountability to donors and impact investors.
- Supports planning, phasing, and transparency.

15.2 Budget Overview (5 years)

Category	USD (millions)	EUR (millions)	Notes
Infrastructure & Hubs	2.5	2.3	Fermentation, drying, storage facilities, transport costs
Planting & Land Prep	3.0	2.76	≈6,000 USD/ha, first 500 ha incl. seedlings & agroforestry
Training & Capacity Building	1.8	1.66	Farmer training, leadership, field workshops
Certification & Monitoring	1.2	1.10	Audits, traceability systems, MEL & impact measurement
Branding & Market Access	0.9	0.83	Brand development, marketing, trade fairs
Management & Governance	0.7	0.64	Salaries, admin, governance, travel
Buffer / Risk Fund	0.4	0.37	Climate shocks, market fluctuations, emergencies
TOTAL (5 years)	9.5	8.74	Realistic projection based on benchmarks

15.3 Expected Results from Budget

- 1,000+ hectares of agroforestry fully operational.
- 400+ farmers trained and certified.
- Premium cacao achieving 20% higher market value.
- Financial sustainability within 5 years.

16.1 Why Sustainability Matters

- Ensures continuity after subsidies and donor support end.
- Integrates ecological, social, and economic dimensions.
- Builds trust among communities and investors.

16.2 Ecological Sustainability

- Permanent agroforestry system with diverse trees and crops.
- Soil management and water protection embedded in training.
- CO2 sequestration leveraged for carbon credits revenue.

16.3 Social Sustainability

- Community ownership via cooperatives and participatory governance.
- Inclusion of youth and women in leadership roles.
- Cultural heritage strengthened by integrating Shipibo identity in branding.

16.4 Economic Sustainability

- Premium cacao generating higher market value.
- Income diversification: fruits, timber, tourism, carbon credits.
- Financial reserves and risk funds embedded in model.

16.5 Dimension vs. Sustainability Strategy

Dimension	Strategy
Ecological	Agroforestry diversification, soil/water management, carbon credits.
Social	Community ownership, inclusion, cultural valorization.
Economic	Premium cacao, diversified income, financial reserves.

16.6 Long-Term Strategy (10+ years)

- Scaling to 2,500+ hectares of agroforestry.
- Positioning as flagship project for 'Amazon Regenerative Cacao'.
- Exporting 1,000+ tons of premium cacao to niche markets.
- Establishing an R&D; Innovation Hub for new agroforestry models.

17.1 Why a Call to Action Matters

- Invites partners to actively contribute.
- Clarifies roles and benefits at each tier.
- Accelerates mobilization of resources and support.

17.2 Partner Tiers

Tier	Annual Contribution	Benefits
Bronze	25,000 USD	Logo on website, access to quarterly reports
Silver	100,000 USD	All Bronze + mention in impact reports, participation in annual stakeholder meeting
Gold	250,000 USD	All Silver + co-branding of hubs or programs, direct involvement in strategy
Platinum	500,000+ USD	All Gold + strategic co-creation, international visibility at events and fairs

17.3 Comparison with Existing Projects

Project	Example Tiers	Notes
Rainforest Alliance	Corporate partners 50K-500K USD	Logo use, certification support, reporting access
Eden Reforestation	25K-250K USD levels	Tree planting sponsorship, branding, site visits
To'ak Cacao (Ecuador)	5K-100K USD support packages	Farmer support, co-branding, storytelling with impact

17.4 Expected Outcomes (5 years)

- At least 20 partners engaged.
- Core activities fully financed.
- Strong international network established for Shipibo Amazon Cacao.

18.1 Assumptions

- Exchange rate: 1 USD ≈ 0.92 EUR (2025 reference).
- Production capacity: 500-1,000 kg cacao/ha/year at full maturity.
- Certification costs benchmarked from Fairtrade & Organic.
- Training costs estimated at 200-300 USD per farmer per year.
- Project duration: initial 5 years, with scaling to 10+ years.

18.2 Abbreviations

- MEL - Monitoring, Evaluation & Learning.
- FPIC - Free, Prior and Informed Consent.
- NGO - Non-Governmental Organization.
- RA - Rainforest Alliance.
- USD/EUR - US Dollar / Euro.
- CO2 - Carbon dioxide.

18.3 Contacts

- Fundación Metsa Nete

Contact: [Project leader to be added]

Email: info@fundacionmetsanete.org

Website: www.fundacionmetsanete.org

- Local Community Representatives

Shipibo-Konibo Cooperative Council

Contact: Cauper Ramírez

- Strategic Partners

Rainforest Alliance (certification partner)

[Other NGOs or companies to be added upon agreement]

Workplan Point 3 – Timeline & Milestones

Purpose of Timeline

The timeline ensures clarity, accountability, and phased implementation. It guides both communities and investors on yearly progress.

Year-by-Year Plan (2025–2029)

Year	Key Activities	Expected Outcomes
2025	Pilot phase in 5-10 villages; 150 ha planted; 1 hub constructed; initial farmer trainings	Trust-building, first cacao plots, community engagement
2026	Expansion to 300 ha; 200 farmers trained; Fairtrade pre-audit; 2nd hub planned	Structured scaling, certification readiness
2027	Reach 600 ha; 300 farmers trained; 2nd hub built; first test exports	Operational mid-scale, quality validation
2028	Reach 800 ha; 350 farmers certified; premium exports begin; branding campaign	Market access, Shipibo cacao brand visibility
2029	1,000+ ha total; 400 farmers certified; 3rd hub; full certification & export contracts	International presence, long-term sustainability

Workplan Point 4 – Governance & Transparency

Governance Philosophy

The project is built on community ownership, guided by the Shipibo-Konibo Cooperative Council, with transparent reporting to both local communities and international partners.

Roles & Structure (Organogram)

- Community Assembly (villages, farmers) → highest decision-making body.

- Shipibo-Konibo Cooperative Council → led by Cauper Ramírez, ensures cultural alignment and fair representation.

- Project Management Team (Fundación Metsa Nete) → coordinates daily operations, donor relations, reporting.

- Technical Advisors (NGOs, universities, certification bodies) → provide expertise in agroforestry, finance, certification.

- External Oversight Committee → guarantees transparency, independent monitoring, financial auditing.

Transparency Mechanisms

- Open-book accounting, available online and in community assemblies.

- Quarterly reports to donors and partners.

- Annual independent audits.

- FPIC (Free, Prior and Informed Consent) for all key community decisions.

Expected Outcomes

- Strong community trust.

- Reduced risk of corruption or misuse.

- Long-term sustainability and legitimacy.

Workplan Point 5 – Impact Monitoring & Evaluation (MEL)

Purpose

Impact Monitoring ensures that the project not only achieves outputs (hectares, hubs, trainings) but also measurable environmental, social, and economic outcomes.

Environmental Impact

- CO2 sequestration: ~6-8 tons CO2/ha/year (based on agroforestry benchmarks).
- Biodiversity: increase in native tree/shade cover (minimum 20% more per plot).
- Soil and water: monitoring organic matter and reduced erosion.

Social Impact

- Farmers certified: 400 by Year 5.
- Women in leadership: minimum 30% of cooperative roles.
- Household income increase: +30-40%.

Economic Impact

- Premium cacao exports: 1,000+ tons by Year 5.
- Price premium: +20% above conventional cacao.
- Active contracts with 3-5 international buyers.

Monitoring Tools

- Annual household surveys.
- Satellite imagery for land-use and forest cover.
- Field audits (Fairtrade, RA, Organic).
- Digital dashboard for partners (quarterly updates).

Expected Outcomes (5 years)

- 1,000+ ha restored and monitored.
- 50,000+ tons CO2 equivalent sequestered.
- 400 families with improved livelihoods.
- Shipibo brand recognized internationally.

Workplan Point 6 – Annexes (Supporting Material)

Purpose of Annexes

Annexes provide supporting materials that strengthen credibility and transparency of the project. They include maps, visuals, endorsements, and organizational background.

Annex Components

Maps

- Map of Ucayali region with project zones highlighted.
- Satellite images (before/after) showing restoration progress.

Photos

- Community meetings and assemblies.
- Cacao nurseries, agroforestry plots, shade trees.
- Cultural Shipibo motifs integrated in branding.

Letters of Support

- From Shipibo-Konibo leaders (e.g. Cauper Ramírez).
- From potential partner NGOs and municipalities.
- From academic or certification partners.

CVs of Key Leaders

- Cauper Ramírez – Shipibo leader & cooperative representative.
- Project Coordinator – Fundación Metsa Nete.
- Technical Advisor – Agroforestry expert.
- Financial Manager – Transparency & donor reporting.

Expected Outcomes

- Added legitimacy through endorsements.
- Trust from donors and buyers.
- Clear visibility of project's cultural and ecological identity.

Workplan Point 7 – Professional Layout & Branding

Purpose

A professional layout ensures that the project document is not only informative but also visually compelling for donors, partners, and communities.

Components

Cover Page

- Title: Shipibo Amazon Cacao Project – Community-led Agroforestry for a Sustainable Future
- Subtitle: A 5-year plan for regeneration, livelihoods, and cultural resilience
- Visuals: Shipibo patterns + cacao pods + Amazon forest imagery
- Logos: Fundación Metsa Nete + partner logos

Icons & Infographics

- Icons for SDGs (1, 8, 12, 13, 15).
- Infographics showing hectares planted, farmers trained, CO2 captured.
- Shipibo-inspired geometric motifs as design accents.

Executive Summary (2 pages)

- Key facts: 1,000 ha, 400 farmers, USD 12M budget, 5-year plan.
- Strategic pillars: livelihoods, ecology, quality, governance, branding.
- Impact at a glance: income +30%, 50,000 tons CO2 sequestered, premium exports.

Expected Outcomes

- Attractive document for investors and donors.
- Cultural authenticity highlighted through design.
- Easier communication of complex data via visuals.