

POLICY BRIEF

Helping producer countries halt deforestation is an investment in UK food resilience



Agile Forest-Food Nexus Sprint

By Michael JA Ruggeri Tiritante, Aline Soterroni, Claudia Coleoni, Katie Hutchinson, Yajju Pradhan, Lubasi Limweta and Nathalie Seddon

November 2026

AGILE INITIATIVE

OXFORD MARTIN SCHOOL

UNIVERSITY OF OXFORD

Summary

The UK's dependence on imported forest-risk commodities links deforestation overseas to food-system resilience at home.

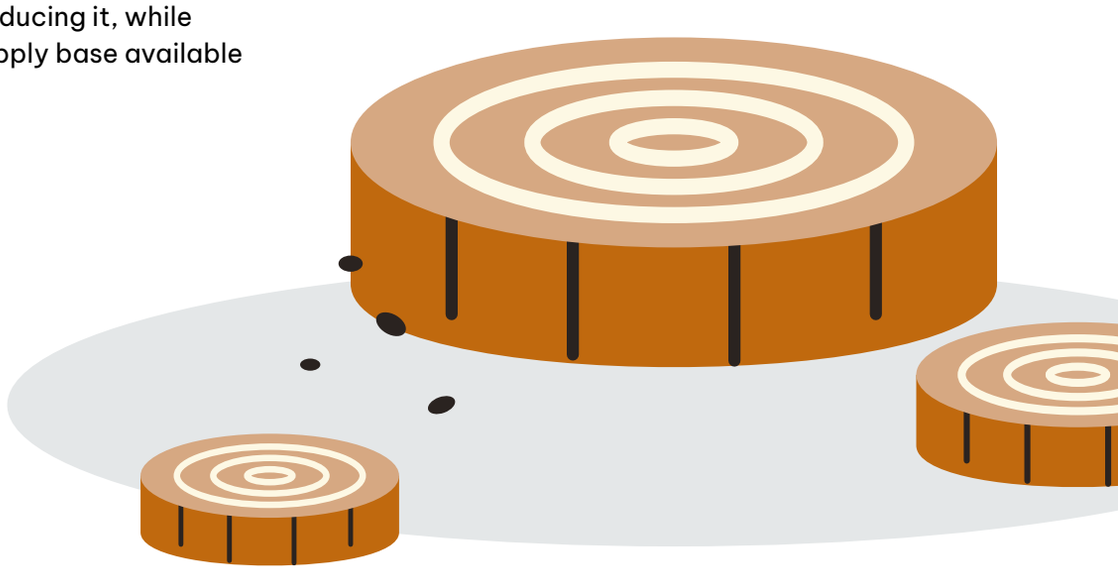
When deforestation and ecosystem degradation undermine agricultural production in producer countries, and climate change reinforces these pressures, supply disruptions can travel through international trade, ultimately affecting UK businesses and consumers. This exposure is particularly important where sourcing is concentrated and substitution options are limited, as the contrasting cases of cocoa and soy show.

Stronger deforestation control can reduce the impact of supply shocks on the UK food system over the long term.

Protecting the ecosystem functions that sustain production, such as rainfall regulation and soil fertility, is expected to reduce the frequency and severity of some supply shocks over time. In the short to medium term (~10 years), however, our analysis finds no advantage for the UK food system from stronger measures because compliance requirements impose transition costs. The long-term gains depend on producers being able to absorb these costs. Where they cannot, exclusion, trade rerouting and exit can lead to leakage, relocating deforestation rather than reducing it, while narrowing the compliant supply base available to UK buyers.

UK demand-side measures, such as due-diligence requirements on forest-risk imports, should therefore treat support for producer countries to meet new requirements as integral to UK food-system resilience.

The evidence favours combining binding requirements, market incentives and producer support over relying on regulation or voluntary commitments alone, and sequencing them so that producers and supply chains can adapt. Finance, technical assistance, monitoring and phased implementation can help stronger action deliver environmental benefits without creating new supply-chain vulnerabilities.



Summary of recommendations

Four areas for action emerge from our findings:

Build transition support into deforestation-control policy from the start

Pair stronger requirements with finance, technical assistance, support for secure land tenure and other forms of tailored support so that producers can adapt and remain in regulated supply chains.

Phase binding requirements to allow producers and supply chains to adapt

Introduce requirements in stages where needed, building on existing systems and increasing ambition as compliance capacity grows.

Monitor impacts beyond deforestation outcomes

Track exclusion, leakage, trade rerouting, supplier concentration, cost pass-through and equity implications, disaggregated by gender and farm size where possible, alongside deforestation outcomes to identify whether risks are being reduced or displaced.

Keep UK action coherent across markets and with producer-country priorities

Align UK measures with relevant domestic policies, international action and producer-country institutions while accounting for regulatory disparities and trade-offs, and involve affected producers in policy design and implementation.

Introduction

The UK food system is heavily dependent on imports. In 2023 alone, the UK imported 40% of its food needs [1], including forest-risk commodities such as soy, palm oil, cocoa and beef, whose production is a significant driver of deforestation and ecosystem service degradation in producing countries. Healthy, functioning ecosystems sustain food production by regulating water, maintaining soil fertility, supporting pollination, and stabilising climate. Agriculture-driven deforestation can weaken these functions and undermine agricultural production and productivity [2]. These risks do not stay local: they transmit internationally through the trade of agricultural commodities.

The UK Government recognises the exposure and vulnerability of its import-dependent food system to supply disruptions and associated price shocks, as the COVID-19 pandemic and the Russia-Ukraine war showed [1]. In January 2026, it published *Global biodiversity loss, ecosystem collapse and national security*, a national security assessment produced by the Joint Intelligence Committee. The assessment identifies nature loss as a significant threat to domestic and international production and, consequently, UK food security. It names the Brazilian Amazon among the ecosystems of strategic importance to the UK, because its further degradation could have systemic effects that reach beyond food security to national security more widely [3].

On the policy side, mandatory due-diligence provisions for forest-risk commodities were introduced under the Environment Act 2021, and further measures are under consideration, alongside international frameworks such as the EU Deforestation Regulation (EUDR). Yet evidence remains fragmented on how different governance options for deforestation control can affect UK consumers, and under which conditions.

This policy brief compiles evidence on how nature loss can result in supply shocks under different governance scenarios, on the pathways through which these shocks reach the UK, and on the conditions that can reduce the emergence of these risks, the speed at which they are transmitted and the size of their impacts. The analysis focused on two forest-risk commodities the UK is highly dependent on: soy and cocoa, whose value chains differ to an extent that allows us to compare how the same governance approach could behave in different supply chains. Impacts are assessed as qualitative ratings: the analysis does not estimate price changes.

Two guiding governance scenarios

High Ambition: binding legal requirements for forest-risk commodity supply chains, supported by public finance, technical assistance and producer-country cooperation.

Business as Usual: voluntary sustainability standards, corporate commitments, certification and market incentives remain the main mechanisms.

These are stylised scenarios developed in consultation with policy partners to guide the analysis, not descriptions of existing policies. Most real-world interventions combine elements of both. Both were assessed over the short to medium term (~10 years) and the long term (~25 years). The labels describe governance arrangements, not assumed outcomes.

What the evidence shows

The UK's exposure is structural

The UK's food system exposure to forest-risk commodity production and supply shocks is shaped predominantly by the structure of its trade relationships and market characteristics, not by domestic production capacity. Both soy and cocoa are import-dependent and have low substitutability, but shocks reach the UK in different ways (Table 1).



Cocoa: shocks show up as price changes or 'shrinkflation'

The UK is among the largest cocoa-consuming markets in Europe [4], and given the size and visibility of its chocolate and confectionery industry, sustained cocoa shocks can have wider commercial repercussions. Large manufacturing operations by Mondelez International, Mars Incorporated and Nestlé are based in the UK. Still, the UK has no domestic cocoa production, so its import dependency ratio is effectively total. The supplier base is highly concentrated, and there is no substitute at scale for core confectionery uses. Demand is extremely inelastic, so a supply disruption passes almost fully into price changes or a reduction in the cocoa content for the same product. During the 2024 cocoa price shock, which was associated with a supply contraction, manufacturers relied on higher retail prices, smaller pack sizes and recipe changes to manage rising input costs [4].



Soy: shocks are amplified by the livestock industry

Around 90% of imported soy is used for animal feed [5], with poultry being the most soy-intensive sub-sector in the livestock industry. Thirty per cent of UK direct soy imports originate from Brazil (2013-2022 average, all soy products in bean equivalent), but the overall UK import dependency ratio reaches 87%, which includes indirect trade from the Netherlands to the UK. Supplier concentration is moderate, although re-exports via hubs such as the Netherlands [6] mean that these figures likely underestimate reliance on Brazilian soy. Feed demand is inelastic in the short run but might be able to adjust moderately over the long run, thanks to alternatives to soy for feed. Consequently, soy shocks are more likely than cocoa to result in quantity and sourcing adjustments, especially for the livestock feed industry. When costs do reach consumers, they mainly arise in meat, dairy and egg prices rather than direct soy products.

In the UK, adjustment costs are unevenly distributed. Small and medium-sized enterprises make up more than 95% of enterprises in the UK food system, although they account for a smaller share of economic activity [7]. They also rely on narrower supplier networks and have less capacity to absorb cost increases, so they tend to see margins erode more quickly or pass price increases on to consumers more rapidly. Where costs reach consumers, lower-income households, who spend a larger share of income on food and have less room to substitute, are therefore likely to bear a disproportionate share of any pass-through.

Table 1. Baseline system properties of UK-linked soy and cocoa supply chains

Indicator	Soy (Brazil)	Cocoa (Ghana)
Import dependency (2013-2022)	87% import dependency ratio, including indirect imports; 30% via direct trade with Brazil	Effectively 100% dependency (no UK production); 59% from Ghana and Côte d'Ivoire
Supplier concentration (HHI, 2013-2022)	Moderate (0.23 HHI)	High (0.29 HHI)
Substitutability	Low: alternative protein meals, with cost and performance constraints	Very low: no substitute at scale for core confectionery uses
Demand responsiveness	Inelastic	Extremely inelastic
Price pass-through	Moderate and asymmetric, strongest at trader and feed stages	Strong and asymmetric, direct through processing and confectionery
UK business-sector exposure	High: feed, livestock, meat, dairy, eggs, processed food	Moderate: concentrated in processing and confectionery

UK business-sector exposure reflects the breadth and intensity of UK business reliance on the commodity: soy is embedded across many food sectors, while cocoa exposure is material but concentrated in processing and confectionery.

Why the gains from binding regulation depend on producer support

In the short to medium term, High Ambition scores no better than Business as Usual on UK food supply, consumer costs or business impacts for both commodities (Table 2). This is because, under High Ambition, upfront transitional costs dominate: traceability, segregation and market eligibility must be established before compliant sourcing can develop.

Over the long run, the pathways diverge. Under Business as Usual, continued deforestation and climate impacts create reinforcing feedback between environmental degradation and production, so future material shocks may be not only larger but also more volatile and less predictable. Under High Ambition, reduced deforestation pressure, stronger traceability and producer support limit the accumulation of these risks, so impacts are more likely to reflect transitional market adjustment than progressively worsening production constraints. In effect, the choice is between transitional adjustment costs now and harder-to-predict disruption costs later.

Table 2. Impact potential on the UK food system, short to medium term → long term

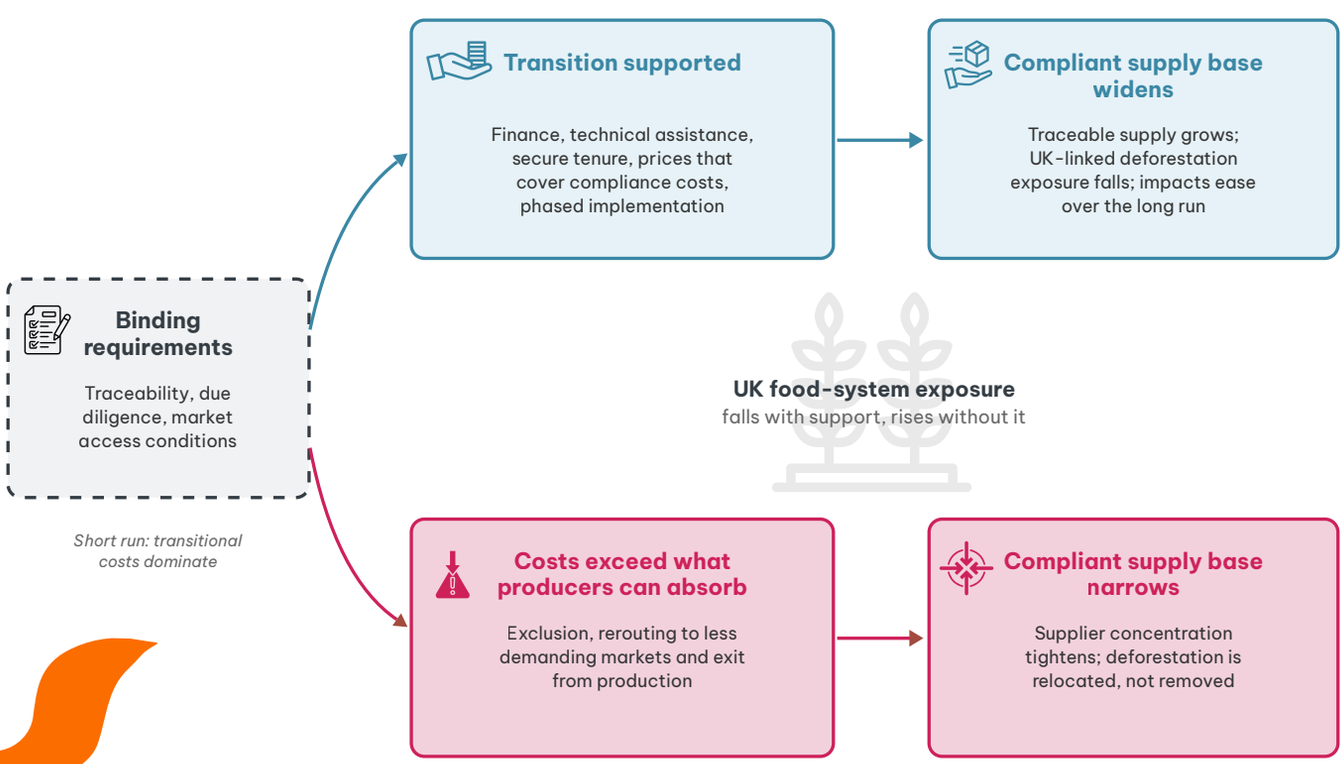
Commodity and scenario	Food supply	Consumer food cost	UK businesses
Cocoa, Business as Usual	High → High	High → High	Moderate → High
Cocoa, High Ambition	High → High	High → Moderate	Moderate → Low
Soy, Business as Usual	Moderate → High	Moderate → High	Moderate → High
Soy, High Ambition	Moderate → Moderate	Moderate → Moderate	Moderate → Low

Short to medium term is ~10 years; long term ~25 years. Under High Ambition, cocoa food-supply impact remains high because structural exposure persists, although availability and resilience improve over time.

This long-run advantage is conditional. In the scenario analysis, High Ambition would be more protective over the longer horizon only if implementation capacity, equitable producer support and market coverage were sufficient to prevent exclusion, rerouting and leakage. Producers' capacity to absorb these costs cannot be assumed. In the Sprint's Ghana cocoa consultation, where participants were asked about stronger, legally binding measures without a specified support package, 71% (20/28) expected export rerouting to more relaxed markets to increase if compliance costs became burdensome, and half expected producers to move out of cocoa into other export goods under those measures. Only two participants (7%) expected higher production costs to be fully compensated through higher cocoa prices.

Both responses are anticipated to further shrink the UK's compliant supply base in the commodity where concentration is already highest and substitutability lowest, while deforestation continues outside the regulated chain. Without the environmental gain the binding measure was meant to deliver, the UK would face higher compliance costs and greater exposure (Figure 1). Brazil's soy sector points the same way: smaller producers face proportionately higher compliance burdens, and stakeholders expect compliant and non-compliant market segments to emerge, with some production redirected to less restrictive destinations.

Figure 1. How producer support may shape the effect of binding requirements on the UK's compliant supply base. A conceptual synthesis of findings from the Forest-Food Nexus technical report (Sections 4 to 6), drawing mainly on the Ghana cocoa consultation and Brazilian soy stakeholder views.



What makes deforestation control work: complementary public and private measures

The Sprint's systematic review found no single model approach to deforestation control. The interventions associated with the largest deforestation reductions were those in which private-sector-led initiatives were supported by favourable measures by public institutions, including monitoring, producer support and accountability. In these cases, market mechanisms created incentives for behavioural change throughout the supply chain while leveraging public services helped reduce compliance costs for individual supply-chain actors.



Implementation quality matters as much as design. Brazil's Action Plan for the Prevention and Control of Deforestation in the Legal Amazon (PPCDAm) combined satellite monitoring, enforcement, land registration, rural credit restrictions and interministerial coordination [8–10], and contributed to a reduction of around 80% in annual deforestation between 2004 and 2012 [11] while agricultural production continued to expand[12]. When enforcement and institutional commitment later weakened, deforestation rates rose again. Since the plan was reinstated in 2023, deforestation has fallen once more, reaching 3,335 km² between August 2025 and July 2026, the lowest annual rate since monitoring began in 1988 [11]. Similarly, several cocoa certification schemes showed markedly different productivity outcomes, with ancillary measures like extension support, coaching and premium delivery often being key determinants.

Demand-side measures also gain traction where the destination market accounts for a large or strategically important share of exporters' sales. This is the case for West African cocoa exports to the EU and the UK, and less so for Brazilian soy, where over 70% of the soybean export volume goes to China. Coherence of deforestation-control approaches across markets therefore matters to increase their leverage.

Producer support helps shape the UK's compliant supply base. Respondents to the Ghana consultation indicated that the sector is likely to support deforestation-control measures, but only under specific conditions. They generally expected a binding policy to bring broader benefits across the cocoa supply chain and to outperform private certification in reducing deforestation. Most also expected High Ambition to distribute costs and benefits poorly and identified smallholders as the group most disadvantaged under either governance approach, followed by women and youth. Their concerns therefore centred less on whether to adopt binding measures than on who would bear their costs.

Binding regulation without adequate equity provisions was expected to generate behavioural responses that could still pose risks to consumer markets, while also excluding smallholders by shifting cost and exclusion risks onto the least resourced producers and displacing deforestation pressures to other sectors. This would not only harm local producers but would also leave the UK cocoa market highly exposed to supply shocks and their transmission through the same trade channels. UK investment in producer-country transition is therefore a resilience lever in its own right: it helps determine whether binding requirements widen the traceable, compliant supply base the UK draws on, or narrow it.

Four conditions for an equitable cocoa transition, identified in the Ghana consultation

1. Prices that cover compliance costs, rather than transferring them to farmers.
2. Secure land tenure, which represented the most frequently cited barrier to deforestation-free production.
3. Technical assistance that accompanies requirements rather than follows them.
4. Farmer inclusion in intervention design from the outset, not rules presented after their implementation.

What this means for policy

Phased implementation and transition planning

Our findings suggest that the negative externalities of standalone strong deforestation-control measures can be reduced when producer countries receive adequate transition support. Sequencing is a lever in itself: phased measures can give supply-chain actors time to adapt, whereas introducing several requirements simultaneously can concentrate adjustment pressure into a shorter period and can amplify downstream disruption. Ghana consultation stakeholders supported this, with 54% of participants preferring a gradual rather than rapid shift towards binding regulations, and 50% preferring a hybrid arrangement combining voluntary incentives and certification with targeted binding regulation, monitoring and compliance support.

Drawing these strands together, the report's findings suggest a four-stage pathway (Figure 2).

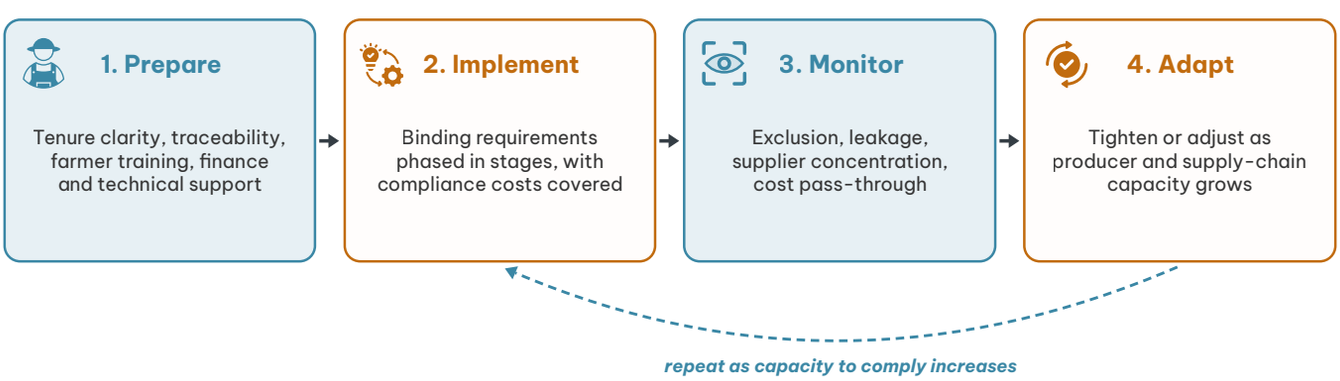


Figure 2. A phased pathway for deforestation control, assembled from the Forest-Food Nexus technical report's findings (Sections 5 and 6).

1. Prepare: put support in place from the start

- Invest in land-tenure clarity, traceability systems, farmer training, finance and technical support, beginning with the supply base.
- Include farmers and producer-country institutions in intervention design as early as possible.
- Build on existing compliance systems, certification schemes and supply-chain infrastructure to reduce transition and compliance costs and improve readiness.

2. Implement: phase binding requirements around what producers can absorb

- Introduce requirements in stages based on readiness levels and design them around what the supply base is able and willing to absorb.
- Ensure compliance costs are equitably distributed along the supply chain rather than transferred to farmers, with incentives that make supplying deforestation-free markets more attractive than supplying less regulated markets or leaving the sector.
- Avoid relying on producer-country legality alone: for example, much UK-linked soy deforestation exposure lies in the Cerrado, where conversion is often legal, so legally produced soy can still carry significant environmental impacts [13, 14].
- Adapt specific measures and requirements to commodity-specific production systems, for example so that cocoa agroforestry is not penalised by a rigid forest or plantation distinction.

3. Monitor: watch for exclusion, leakage and concentration

- Use strong monitoring mechanisms to reduce circumvention and the information gaps that increase volatility and market uncertainty.
- Track exclusion, export rerouting, exit from production, supplier concentration, cost pass-through and who bears the costs (disaggregated by gender and farm size) alongside deforestation outcomes to manage exposure.
- Identify plausible leakage into adjacent commodities and sectors, such as cattle in Brazil, supported by a policy gap analysis.

4. Adapt: tighten as capacity grows, and keep measures coherent

- Tighten or adjust requirements as producer and supply-chain capacity to comply increases.
- Align UK measures with adjacent domestic policy and international instruments such as the EUDR, whose alignment amplifies the reach of any UK measure.
- Support sector-level coordination on transition costs and build the response capacity of those most exposed in the UK, including SMEs.

About the evidence

The evidence base is uneven across commodities, geographies and governance approaches, and findings should be read as indicative patterns. The systematic literature review primarily returned qualitative evidence, with only a minority of studies providing quantitative estimates of deforestation and productivity effects. The trade and risk transmission analysis treats trade in the two selected commodities, soy and cocoa, as the main transmission pathway between producers and consumers, compares only the two ends of the governance spectrum, and is exploratory rather than a forecast; it does not consider other sources of risk, such as geopolitical tensions. The Ghana consultation findings rely on a purposive and relatively small sample, with no individual farmers responding, thus offering stakeholder insights as opposed to representative estimates of full supply chains.

At the same time, findings are interpreted in light of the associated levels of uncertainty and confidence, mapped across workstreams. The design principles in this brief (producer support, phasing, monitoring and coherence) recur across the Sprint's evidence and the wider literature it reviews, which is why the brief emphasises them over specific effect sizes.

Case Study 1: Soy

Brazil's Amazon Soy Moratorium: what made it work, and why its erosion matters

The Amazon Soy Moratorium (ASM) is the clearest example of hybrid governance in the evidence base. Established in 2006, it committed signatory traders, responsible for about 90% of the Amazon soy market, not to buy soy produced on land deforested after an agreed cut-off date (initially July 2006, later moved to July 2008). Participation was voluntary, but implementation relied on public monitoring through INPE's PRODES satellite system and, later, the Rural Environmental Registry (CAR), as well as oversight by the multi-stakeholder Soy Working Group, which brought together government, civil society and the private sector.

Between 2006 and 2016, the Moratorium is estimated to have prevented around 18,000 km² of deforestation, about 35% less than the counterfactual, while soy production continued to expand on previously cleared land [15]. The literature consistently concludes that this cannot be attributed to voluntary commitments alone. It came from complementarities between private market commitments and public monitoring, land registration and enforcement, within a wider policy mix that included the PPCDAm [12, 16, 17]. Its coverage was limited to the Amazon biome and did not extend to the Cerrado[18].



Hybrid arrangements depend on the continued alignment of public and private actors. Where one component weakens or is withdrawn, the whole arrangement may be compromised.

In January 2026, following increasing political, legal and economic pressure, ABIOVE, the association representing major soy traders, announced its withdrawal from the Moratorium. Recent research projects that, without the Moratorium, around 1.4 million hectares of additional deforestation could occur by 2036 [13]. These dynamics suggest that voluntary commitments can effectively contribute to nature conservation without constraining production when embedded in an enabling policy environment, supported by effective monitoring, enforcement and broad market participation. However, the Moratorium's weakening also illustrates the fragility of voluntary private-sector agreements, which signatories can abandon when political or economic incentives change. Given the UK's dependence on imported soy for livestock production, changes in Amazon governance have direct implications for the resilience of UK supply chains and the food system, and for UK climate objectives.

Case Study 2: Cocoa

Ghana: a sector ready for ambition, if producers are adequately supported

Ghana's cocoa sector is predominantly smallholder-based, with most farms under 2 hectares, and becomes concentrated beyond the farm gate, where fewer than ten major traders and processors handle much of the global cocoa bean trade. The Sprint consulted stakeholders across the value chain, receiving 28 responses (none from individual farmers) from around 150 stakeholders contacted, 22 of whom were based in Ghana. Insecure land tenure was the most frequently cited barrier to deforestation-free production, followed by inadequate policy support, lack of technical knowledge or support, and lower yields from harvesting only deforestation-free cocoa.

The 2024 cocoa price shock: who absorbed the costs?

During the global cocoa shortage and price shocks of 2024, processors, manufacturers and retailers responded with price increases, smaller pack sizes (shrinkflation) and recipe reformulation. Yet in Ghana, a higher producer price did not necessarily translate into higher incomes for farmers, as productivity, production costs and household inflation continued to determine whether they achieved a living income.



90%

of participants who answered said UK investment would improve the achievability of High Ambition deforestation control. Financial support and training or technical support were each rated most valuable by 59%.

Ambition, with a transition path. When offered a hybrid option, half of participants preferred it as a starting point, 43% chose High Ambition, and only one participant chose Business as Usual. When asked where the sector should go, 54% favoured a gradual shift towards High Ambition and 21% a rapid one.

Who bears the cost. Smallholders were seen as the most disadvantaged under both High Ambition and Business as Usual scenarios, selected more than three times as often as the next groups (women and youth) under Business as Usual.

In summary, the sector is open to stronger forest action, but only if it is introduced over time and supported in ways that prevent the shifting of burdens onto smallholders. If smallholders are excluded, deforestation leaks or exports are rerouted to markets with weaker rules, the supply chain serving the UK is likely to face shocks, volatility and increased risk.

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About the authors

This brief was prepared by an interdisciplinary team from the Agile Initiative and the Nature-based Solutions Initiative at the University of Oxford. Using a cascading risk framework, the team traced how governance choices for forest-risk commodities affect production, trade and, ultimately, UK businesses and consumers. The work combined a systematic literature review and meta-analysis, a trade and risk transmission analysis, and a stakeholder consultation in Ghana's cocoa sector.

About this brief

This brief draws on the Forest-Food Nexus technical report (forthcoming). The Sprint explored how trade in forest-risk commodities links producers and consumers across global supply chains, and what ecosystem disruption could imply for producers and for the UK food system, including its resilience, under different hypothetical governance scenarios.

Report authors

Michael JA Ruggeri Tiritante, Claudia Coleoni, Lubasi Limweta, Yajju Pradhan, Dr Katie Lois Hutchinson and Dr Aline Soterroni.

Full methods, references and limitations are set out in the forthcoming technical report.

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