

Resilience for the Future:

How Brazil Can Lead the Regenerative Landscapes Revolution

EXECUTIVE SUMMARY

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INTRODUCTION

Our agri-food system is at a crossroads. Climate change is already impacting harvests and supply chains, threatening farmer livelihoods and global food security. 30% of global emissions come from agriculture and land use change, 40% of agricultural land is degraded, and there is a US\$12T hidden cost of inaction from our ability to adapt. Nearly 30% of the agricultural land in the Americas – 334 million hectares – has fallen into degradation. Yet, reversal is still within reach. In the continent, regenerative agriculture and sustainable land management could sequester up to 13.1 billion tons of CO₂ equivalent over the next two decades, equivalent to 39% of its agricultural emissions and help to address the economic, ecological, and social consequences of our agri-production system¹.

Brazil is at the heart of this challenge. In 2023, it emitted 2.3 billion tons of CO₂e, with land-use change and agriculture responsible for 74%. At COP29, the country pledged to cut net emissions by 59% to 67% by 2035, relative to 2005 levels. Achieving this target requires two fundamental shifts – restoring degraded land and enhancing agricultural efficiency. Crucially, this transition must not come at the expense of productivity. Instead, Brazil can lead by embracing regenerative practices that strengthen both economic performance and environmental resilience.

As the host of COP30, Brazil faces a defining moment to assert its leadership on regenerative landscapes, including agriculture and land management. With global attention

on Belém, the country will be under intense scrutiny to balance economic priorities with environmental responsibility. The conference presents a rare opportunity to position regenerative landscapes at the core of global climate action for food and agriculture, influencing investment and policy direction. Fulfilling commitments on deforestation, land restoration, and regenerative farming will be crucial – not just for Brazil's credibility and climate goals, but for the resilience of global value chains.

Our estimates indicate that 50 million hectares in Brazil, within the Cerrado and Amazon, present a unique opportunity to scale regenerative agriculture and sustainable land use² through a landscape-driven approach³. Together, these biomes cover more than 70% of Brazil's land area, offering vast potential for restoration and productivity gains⁴. By restoring 39 million hectares⁵ of degraded pastures and adopting sustainable techniques across another 11 million hectares, Brazil can expand agricultural output without further land conversion.

These objectives are closely aligned with the ambition of the Ministry of Agriculture's PNCPD⁶ ambition of recovering 40 million hectares of degraded pastures and are supported by the sustainable mechanisms outlined in the ABC+ Program⁷ framework. By producing more with fewer resources, there's opportunity to strengthen the long-term competitiveness, sustainability, and resilience of Brazil's agricultural sector.

THE CERRADO



32 million hectares, 64% of the total identified potential, lie within the Cerrado. Spanning 200 million hectares, the region has undergone a profound transformation over the past four decades. Once a mosaic of sparse ranchlands, it has become one of the world's most productive agricultural frontiers, cementing Brazil's position as a global agribusiness leader. Today, it accounts for 55% of the country's primary agricultural output, driving the production of key commodities such as soybeans, maize, sugarcane, seed cotton, poultry, and cattle.

Yet the Cerrado is far more than an agricultural powerhouse, and its rapid expansion has come at a considerable environmental cost. As one of the planet's most biodiverse ecosystems, it remains a critical conservation priority. It is also a vast carbon reservoir, storing an estimated 13.7 billion tons of carbon, and the source of South America's most vital river basins, sustaining freshwater systems across the continent. Rising temperatures and an increasingly volatile climate are already affecting producers – large and small alike – as well as local communities. Preserving the Cerrado is not an option. It is an imperative.

1. Cerri et al. (2024) highlight a significant research gap in the study of best management practices (BMPs), as evidenced by the low occurrence of related terms, such as cover cropping, in the literature. Their estimates indicate that scaling up BMPs across 30% of the agricultural land area in the Americas—approximately 334 million hectares—could result in soil carbon sequestration of 13.1 (±7.1) petagrams of CO₂ equivalent over 20 years. This sequestration potential could offset roughly 39% of agricultural greenhouse gas emissions over the same period. The findings underscore the need for more robust monitoring of cropping system impacts on soil carbon dynamics, particularly in regions where data availability remains limited.; **2.** Regenerative agriculture is defined by four core principles: delivering measurable benefits to carbon sequestration, biodiversity, and water management; improving yield resilience while ensuring farmers' economic stability; applying proven practices adapted to local conditions; and prioritizing soil and crop health through the restoration of the soil ecosystem.; **3.** The landscape approach is a place-based land management strategy that brings stakeholders together across sectors to achieve shared sustainability goals. It addresses the interconnectedness of land uses such as agriculture, forestry, biodiversity conservation, and urban development, seeking to balance economic growth, ecological resilience, and social well-being. This approach requires cross-sectoral collaboration and inclusive decision-making to reconcile competing priorities and foster long-term resilience at scale.; **4.** According to the World Economic Forum's report (2023), 'The Future of Nature and Business,' this agricultural model is one of the most important strategies for transitioning to more sustainable, productive, and inclusive production models. If adopted on a large scale, by 2030, this model could generate business opportunities worth US\$1.4 trillion annually and create 62 million new jobs globally.; **5.** Our study identifies 19.5 million hectares of degraded pastureland in the Cerrado and Amazon biomes with agricultural potential. Comparable results following a similar methodology are found in Embrapa's study published in Land. It estimates 28 million hectares of degraded pastures could be repurposed for agriculture in Brazil, excluding high-biodiversity and protected areas (Bolfe et al., 2024); **6.** National Program for the Conversion of Degraded Pastures.; **7.** Brazilian Agricultural Policy for Climate Adaptation and Low Carbon Emission.

THE AMAZON



The remaining 18 million hectares of identified potential are concentrated along the agricultural frontier within the Amazon biome. The Amazon, spanning over 420 million hectares in Brazil alone, is a reservoir of extraordinary terrestrial, aquatic, and cultural diversity. It is home to nearly one million Indigenous people from more than a hundred distinct groups, alongside other traditional communities, extractivists, and small-scale farmers.

Over 17% of the basin's forest has already been converted, with another 17% severely degraded. If the current pace of deforestation persists, the Amazon could reach its tipping point by 2030. Alarmingly, in the past decade, one-third of the biome has already crossed these thresholds. Should degradation continue beyond

this point, the Amazon risks irreversible collapse – devastating not only its unparalleled biodiversity and cultural heritage but also Brazil's agribusiness sector and broader economy.

In the Amazon, beyond repurposing pastures for high-value agribusiness and improving pasture management, there is also a viable opportunity to embed bioeconomy⁸ principles into the landscape regeneration. For instance, açai, palm, cocoa, rubber, Brazil nuts, and andiroba offer a foundation for a bioeconomy-driven transformation. In Pará alone, for instance, cocoa production in agroforestry systems could reach 630,000 tons, bridging domestic supply gaps and unlocking export potential.

THE ECONOMIC CASE FOR REGENERATIVE LANDSCAPES

Investing in regenerative agriculture and sustainable land use within a landscape approach is essential to balancing productivity and environmental stewardship in Brazil. The impact on global food, fiber and fuel supply would be substantial. As the world's largest soybean exporter, Brazil could expand production from 150 million to 231 million tons by 2050, increasing its global market share from 38% to 48% – all without encroaching on native forests. Beef production could grow from 10 million to 13 million tons, sustaining an 18% global share even as demand rises by 30%, while its exports could climb from 3 million to 5 million tons, alongside a 12% increase in domestic consumption. These gains would be driven by improved pasture management, healthier soils, and regenerative farming – not land expansion. The transition is expected to generate up to US\$28 billion in annual GDP increase for Brazil by 2050, equivalent to nearly 1.3% of the country's current economic output.

Achieving this vision requires US\$93 billion in investment – US\$55 billion for the Cerrado and US\$38 billion for the Amazon. The financial case for farmers is compelling, with projected returns of 15% to 29% IRR⁹. While private capital and subsidized credit could provide up to 85% of the total, blended finance will be essential to mitigating early-stage

risks. Within these amounts, nearly US\$2 billion in concessional funding and insurance will be needed in the first five years to scale sustainable practices. These figures also account for critical investments in precision monitoring, transparent verification, and scalable financial instruments – key to building investor confidence and ensuring accountability.

More than 600,000 growers and ranchers across Brazil stand to benefit, strengthening their livelihoods while advancing sustainable land-use models. For them, it is not only a future necessity but also a present opportunity and an economically compelling strategy. Gains in productivity, cost reductions, and greater resilience in challenging years far outweigh the investment needed.

⁸. Although definitions vary according to the literature and G20 members, we define bioeconomy as the process of transforming renewable biological resources into materials, chemicals, and energy, encompassing a dynamic interaction between nature and society that integrates biotechnology, biomass-based value chains, and ecosystem sustainability while reflecting diverse economic, cultural, and ecological priorities (Uma Concertação pela Amazônia, 2023; Johnson et al., 2022; Bugge et al., 2016; Ferraz & Pyka, 2023; Mittra & Zoukas, 2020; Wei et al., 2022).;

⁹. Internal Return Rate, in nominal terms.

WHAT LIES AHEAD

Momentum is building. The Landscape Accelerator – Brazil (LAB), a joint initiative led by BCG, CEBDS, and WBCSD under the Action Agenda on Regenerative Landscapes (AARL), is working to accelerate this transformation – beginning with COP30 in 2025. The LAB is tackling the key systemic barriers to scaling regenerative landscapes with support from over a dozen corporate members and key partners including MAPA and the Pará state government. The LAB is not about creating new projects on the ground; rather we convene agribusinesses, financial institutions, Brazilian institutions and authorities, and civil society to drive alignment, address bottlenecks and accelerate existing solutions.

We will deliver these outcomes as a consensus-driven package at COP30 in cooperation with our corporate members and partners.

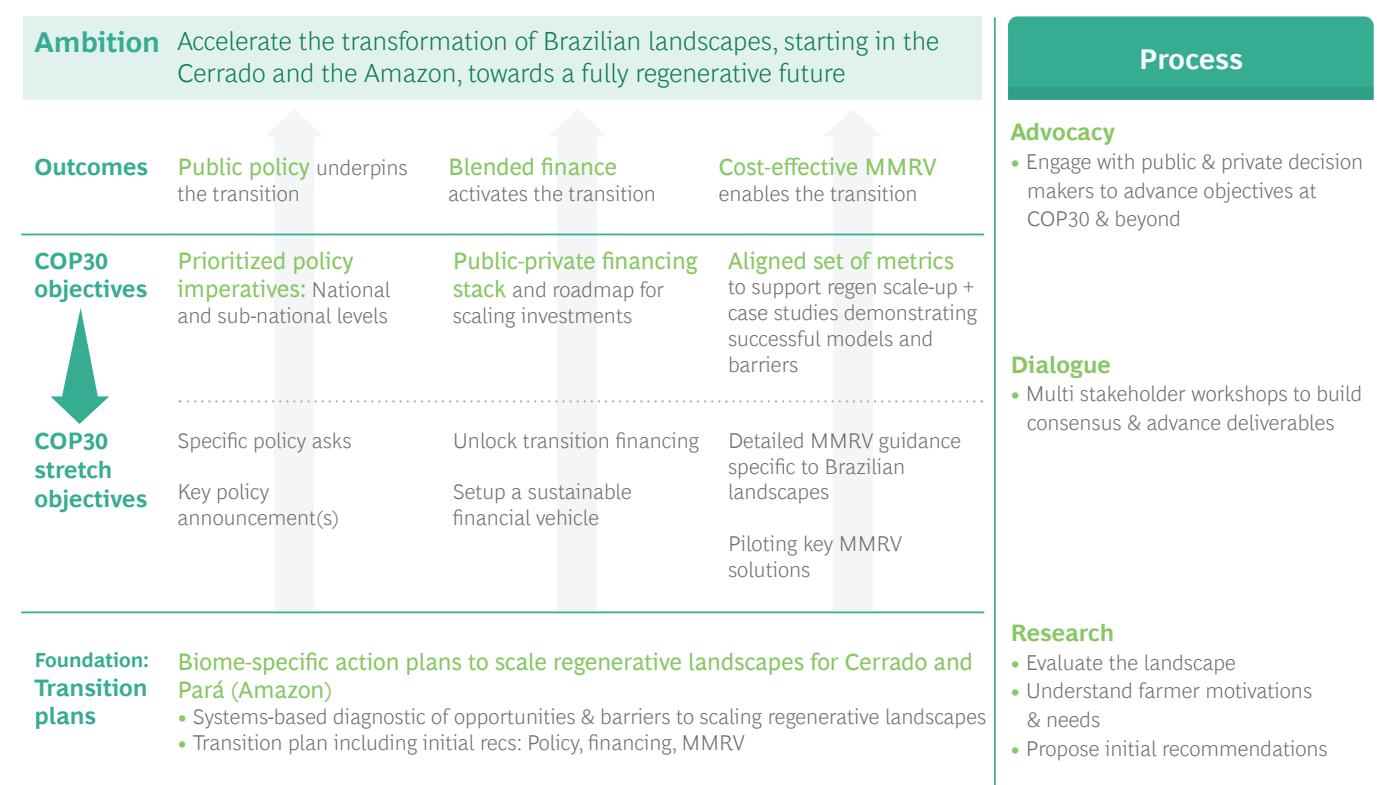
Beyond financing, effective coordination between the public and private sectors is essential. Key priorities include a clear and inclusive policy framework, a strong regulatory foundation, standardized methodologies for recognizing and validating regenerative practices, expanded access to credit, incentives for technical assistance, and payments for environmental services. These elements are vital to driving the transformation of Brazil’s biomes and cementing the country’s leadership in sustainable land use.

Brazil can set a global standard, proving that production and conservation go hand in hand. This transformation is underway. You can be part of it.

The time to scale regenerative landscapes in Brazil is now.

BCG, CEBDS, and WBCSD on behalf of Landscape Accelerator – Brazil (LAB) Secretariat and The Action Agenda on Regenerative Landscapes Secretariat – COP28 Presidency, UN High Level Climate Champions, Boston Consulting Group (BCG) and WBCSD.

The Landscape Accelerator in Brazil (LAB)



Sources: Action Agenda on Regenerative Landscapes; WBCSD; BCG Analysis



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