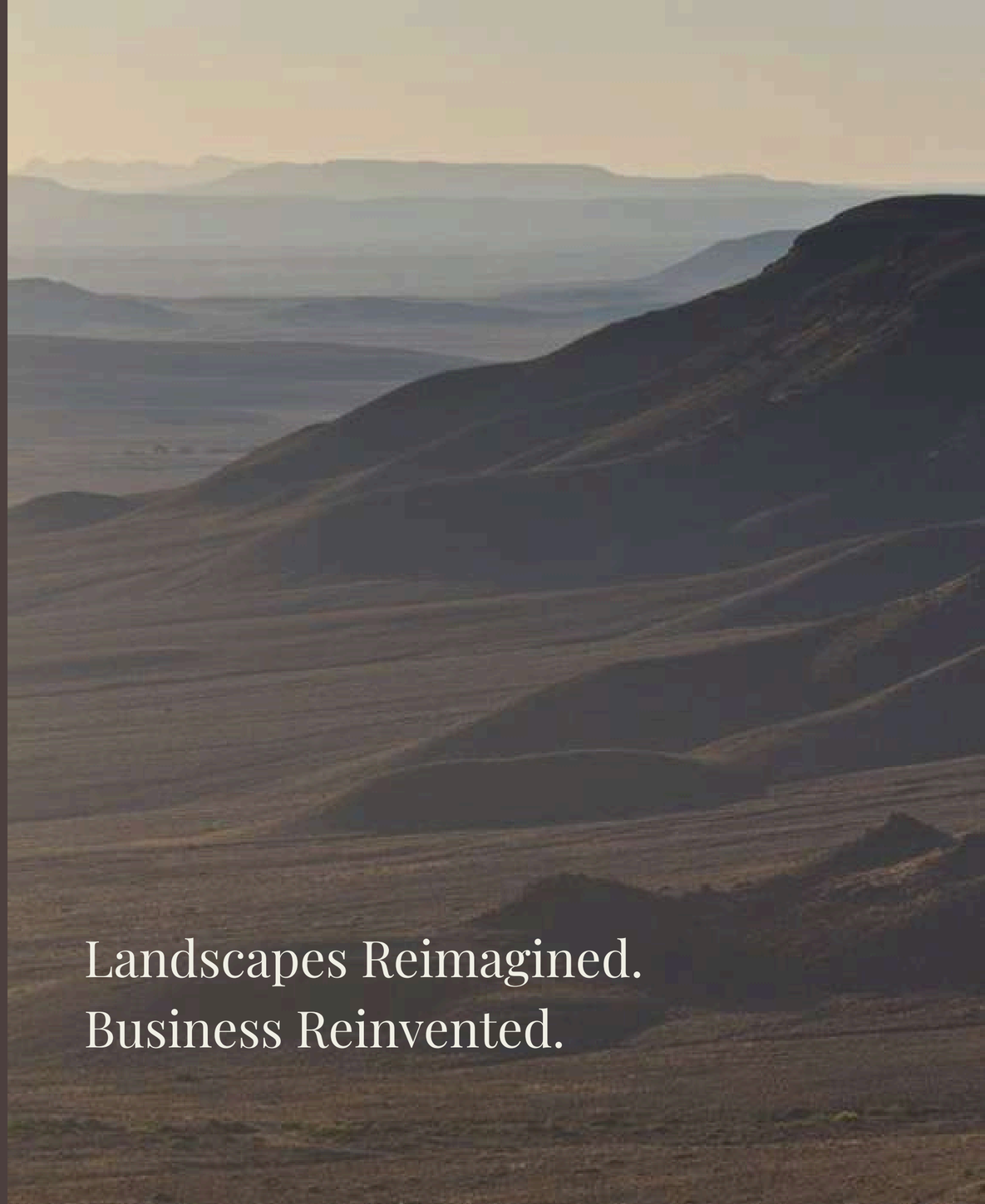
Gerana Initiative

Market Opportunity Scoping

The Big Picture
From Insights to Action



Landscapes Reimagined.
Business Reinvented.

“Emerging research from the Gerana Initiative reinforces something we are seeing increasingly across our landscapes - that the health of river basins, soils and ecosystems is directly linked to long-term business resilience.

For Sappi, supporting initiatives like this is important because they help build practical collaboration on the ground, and efforts such as the Landscape Discovery Lab in the uMkhomazi River Basin contribute to strengthening lands.”

Graeme Wild, CEO, Sappi Southern Africa

The headlines

1. Business resilience is shaped by the health of landscapes

2. A shift is underway from supply chains to multifunctional landscapes

3. This requires a different approach to how innovation is designed

4. In Africa, landscapes are important centres of innovation

5. From research, we move into real-world landscapes

- In South Africa: the uMkhomazi River Basin
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The summary

MOS The bigger picture

Business resilience is increasingly shaped by the health of landscapes - the rivers, soils, ecosystems and communities that underpin global supply.

Gerana's Market Opportunity Scoping (MOS) explores what it will take for companies to act collectively in the places they source from, moving beyond fragmented initiatives toward coordinated, landscape-scale action.

Drawing on interviews with 41 senior leaders across 34 global companies, the research identifies a shift already underway:

- from supply chains to multifunctional landscapes
- from isolated action to collective approaches
- from sustainability as a "nice to have" to resilience as a business-critical priority

What the research reveals

While ambition is growing, landscape collaboration is not yet widespread. Across sectors, companies are navigating a set of recurring structural tensions:

- **Time horizons:** landscapes recover over decades, while business operates in quarters
- **Governance and agency:** those closest to the land often lack decision-making power
- **Capital allocation:** benefits are shared, but investment responsibility is unclear

These are signals of where system design is needed.

A changing context

Growing market demand, evolving policy frameworks and new finance mechanisms - alongside rising pressure from climate disruption, land degradation and resource security - are reshaping how companies understand risk and opportunity.

Across regions, the conditions are aligning for a transition to a regenerative economy, increasingly organised around landscapes.

From insight to action

The MOS points toward a shift from fragmented, project-based engagement to coordinated, place-based landscape partnerships.

Gerana's Landscape Discovery Labs test what this looks like in practice - connecting companies, land stewards, communities and finance actors to:

- align around shared priorities
- build governance and collaboration models
- design pathways for investment and delivery

Rather than starting from scratch, the Labs build on existing efforts - helping to connect and strengthen what is already underway within landscapes.

The MOS is a starting point.

Through 2026, Gerana will convene cross-sector dialogues and continue to develop Discovery Labs across landscapes in:

- South Africa (uMkhomazi River Basin)
- Tanzania (Simiyu landscape)
- Benin (Ouémé River Basin)

Join the conversation in the Gerana Commons.

Business resilience is shaped by the health of landscapes

Released in the week of World Water Day and contributing to the wider global conversation on water security, new research from the Gerana Initiative - an independent collective action initiative connecting business to landscape resilience and supply security - highlights growing recognition that the health of river basins, soils and ecosystems is becoming fundamental to business.

Water scarcity, changing weather patterns, flooding, soil degradation and biodiversity loss are no longer distant environmental concerns. They are operational realities for industries that depend on agricultural and forest production.

As these pressures intensify, businesses are recognising that supply security begins in landscapes. The organisation's Market Opportunity Scoping (MOS) examines how companies are beginning to respond to these landscape-level risks.

The question asked:

What would it take for businesses to act collectively in the landscapes they depend on?

Drawing on interviews with 41 senior leaders across 34 global companies, the MOS research explores how businesses are interpreting these pressures in the landscapes that underpin their supply systems - and where opportunities for collective action may lie.

The research identifies six recurring system tensions that make landscape collaboration difficult in practice:

Time horizons
Trust
Resilience framing
Governance
Capital allocation
Knowledge

These tensions point to where change is needed.

In response, the MOS sets out six working hypotheses - practical areas where system design can evolve to enable more effective collective action across companies, sectors and geographies.

The findings point toward an emerging shift: business and landscape resilience are becoming increasingly intertwined.

The MOS study is supported by Sappi, a global pulp and paper company and one of the world's leading producers of dissolving wood pulp through its Verve business, supplying renewable wood-based fibres for textiles, pharmaceuticals and other industries.

Recognising the challenge is one thing.
Learning how to act collectively at landscape scale is another.

From supply chains to multifunctional landscapes

For decades, sustainability efforts in global value chains have largely focused on improving practices at the level of individual suppliers or farms.

In landscapes, actions do not stay contained: deforestation upstream can drive flooding downstream, and chemical use on one farm can reduce pollination across many - making farm-by-farm or company-by-company approaches insufficient.

Certification systems, traceability tools and corporate sustainability programmes have played an important role in raising standards. But the MOS research suggests these approaches may no longer be sufficient to address the systemic risks now emerging.

Climate change is intensifying droughts, floods and ecosystem degradation across many of the world's key sourcing regions. Increasingly, these disruptions play out at landscape scale - across river basins, agricultural regions and forest ecosystems - rather than within the boundaries of individual farms or companies.

Businesses are increasingly recognising that securing long-term supply may require collaboration beyond the fence line, across shared sourcing landscapes and supply networks.

Climate change and nature loss are no longer distant, external or disconnected environmental issues – they are operational risks for business.

Companies depend on healthy landscapes for water, raw materials and livelihoods. These are the living systems that underpin both our economies and supply networks. When they are under pressure, businesses are too.

What we are seeing is a shift: more businesses recognise the need to act but are navigating how to move from fragmented or philanthropic approaches toward more coordinated, landscape-scale action. The question is no longer whether to act, but how quickly companies can come together to act collectively where it matters most."

Liesl Truscott, Founder, Gerana Initiative

A different approach to innovation design

The MOS research does not assume that landscape collaboration is already widespread.

Through interviews, analysis and dialogue, it identifies a set of structural tensions that repeatedly emerge when companies attempt to collaborate at landscape scale.

These tensions are most visible around time horizons, governance and power, and capital allocation.

As anonymised MOS participants described them:

Time horizons
Landscapes recover over decades, while corporate decision-making is often shaped by quarterly performance cycles and shorter-term reporting pressures.

> “Farmers think in decades and sometimes centuries. Most companies think in quarters. How do we bridge that?”
>
> SME, Supplier/Manufacturer, Food/Fibre/Beverage

Governance and Power dynamics
Landscape initiatives depend heavily on the leadership of land stewards, communities and governments, while global companies often control finance and market access.

> “The power dynamic is completely backwards. The people who know the land best have the least say in what happens to it.”
>
> Very Large Trader/Integrator, Food/Fibre/Beverage

Capital allocation
Landscape interventions often generate shared benefits across multiple actors, making it difficult to determine who should invest and how value should be shared.

> “If we restore water quality in this watershed, every brand sourcing there benefits – even if they didn’t pay a dime. How do you solve that?”
>
> Very Large Brand/Retailer, Food/Fibre/Beverage

According to Simon Cooper, lead interviewer for the research, these tensions are signals of where system design is needed.

> “While interviewees recognise the urgency of resilient landscapes, tensions remain around time horizons, governance and capital allocation. These can be seen as design challenges rather than roadblocks.”

In Africa, landscapes are important centres of innovation

Landscape approaches are beginning to take shape across the world, with each landscape responding to its own ecological, social and economic context. In Africa, this shift presents a particular opportunity to align ecological restoration with inclusive economic development.

Across the continent, conditions are aligning for a transition to a regenerative economy at landscape scale. Growing market demand, evolving policy frameworks and new finance mechanisms - from carbon monetisation to green bonds and impact investment — are creating an enabling environment for change.

This direction is increasingly reflected in global convenings - from the Global Landscapes Forum (GLF) Africa to Africa's Green Economy Summit and the UK–Africa Women in Food and Agribusiness Investment Summit (WiFAI) - where discussions are converging on how Africa can build a nature-based economy by integrating restoration, finance, governance, women's leadership and inclusion, and local knowledge into a coherent development pathway.

We are now in the second half of the 2030 horizon - the "decisive decade" - and progress, alongside global markets, is being disrupted by rising social unrest, polarised political contexts, and the impacts of climate change and land degradation. A growing focus on national priorities, including food and resource security, is reshaping how risk is understood, reinforcing the need for coordinated, cross-sector collaboration at the local level and across global supply networks.

This sharpens the focus on collective action in sourcing landscapes - bringing priorities for people, nature and business performance together more quickly and credibly.

In response, regenerative agriculture, renewable energy, ecotourism and enabling technologies, including advances in monitoring and data, are increasingly recognised as critical to this transition.

Efforts to restore and reconnect habitats, river systems and wetlands are beginning to take shape, alongside emerging finance mechanisms designed to incentivise action - pointing toward more stable, climate-adaptive and biodiverse production systems on which long-term business resilience depends.

Many of the landscapes shaping the future of economic transition are located in Africa.

This transition requires a shift in how commodities and supply systems are understood - from linear value chains to interconnected, multifunctional landscapes where forests, wetlands, farms and rangelands meet settlements, wildlife corridors and cultural traditions.

These landscapes support globally traded commodities such as cotton, wood fibre and shea, underpinning industries including fashion, beauty and pharmaceuticals, with landscape approaches, anchored in systems thinking and multi-stakeholder collaboration, creating the conditions to sustain livelihoods and biodiversity.

Within these landscapes, stewardship is continuously shaped through knowledge exchange and lived experience. Women play a central role - from smallholder farming to forest management and traditional governance - as well as in holding and transmitting knowledge across generations, highlighting the importance of inclusion in how knowledge is applied and scaled.

As these dynamics evolve, companies are recognising that enduring value is built through relationships and shared decision-making alongside local stakeholders, rather than through isolated interventions.

The MOS research points to a shift from fragmented, project-based engagement toward coordinated, place-based landscape partnerships, linking business resilience to long-term outcomes in the landscapes companies depend on.

From research to real-world landscapes

If the MOS identifies the design challenges, the next step is to test how these ideas can work in practice - in real landscapes.

Rather than starting from scratch, the Gerana Initiative's **Landscape Discovery Labs** work by connecting and strengthening efforts already underway, bringing together companies, land stewards, communities, civil society and finance actors to explore how collaboration can function at landscape scale.

Across regions, farmers, NGOs, companies and local institutions are already working to improve land stewardship, strengthen value chains and restore ecosystems. What is often missing is the system design that allows these efforts to align, scale and endure over time.

Gerana's Landscape Discovery Labs therefore create spaces where actors can examine the structural questions highlighted by the MOS - from time horizons and governance to financing models and shared measurement - while building on the knowledge and initiatives already present in each landscape. In doing so, the Labs help translate fragmented efforts into coordinated systems that support both ecosystem restoration and more resilient, inclusive landscape economies.

The role of landscape collective action is not to invent new initiatives, but to connect existing ones into systems capable of sustaining both ecosystems and economies over time.

Another important feature of the Discovery Labs is landscape-to-landscape learning.

While each landscape has its own ecological, social and economic context, many of the underlying challenges - from water stewardship to farmer livelihoods and financing mechanisms - are shared.

The three Discovery Labs, that follow, illustrate how these ideas are beginning to take shape in practice.

In South Africa: the uMkhomazi River Basin

In South Africa’s uMkhomazi River Basin, the landscape stretches from the Drakensberg mountains to the Indian Ocean, linking grasslands, wetlands and forested catchments that supply water to downstream communities, agriculture and industry.

Alongside commercial forestry and farming, the region supports pastoralist livestock systems, rural communities and important biodiversity corridors that sustain ecological connectivity across KwaZulu-Natal.

Sappi - through its Verve business - is a major forestry and biomaterials company with extensive plantation holdings in South Africa and a global role in supplying dissolving wood pulp for textiles, pharmaceuticals and other industries.

Within this landscape, Sappi has been working with partners including WWF to address catchment-level water risks affecting both ecosystems and industry.

Through collaborative catchment initiatives, stakeholders are exploring how invasive species clearing, restoration and improved governance can strengthen water security across the basin. Alongside these efforts, Sappi’s Khulisa social forestry programme supports smallholder and community growers to participate in the forestry value chain, linking landscape stewardship with local livelihoods.

The Discovery Lab creates an opportunity to build on these efforts by aligning companies sourcing from the basin around shared data, coordinated action and investment.

“Healthy river basins are fundamental to the long-term viability of our dissolving wood pulp and forestry operations.

As climate and water risks intensify, it is increasingly clear that business resilience is closely tied to the health of the landscapes we operate in. Strengthening ecosystem function and working collaboratively at catchment level is key to sustaining supply, supporting local livelihoods, and building long-term value.”

Krelyne Andrew, General Manager of Sustainability for Verve, Sappi

In Tanzania: the Simiyu Region

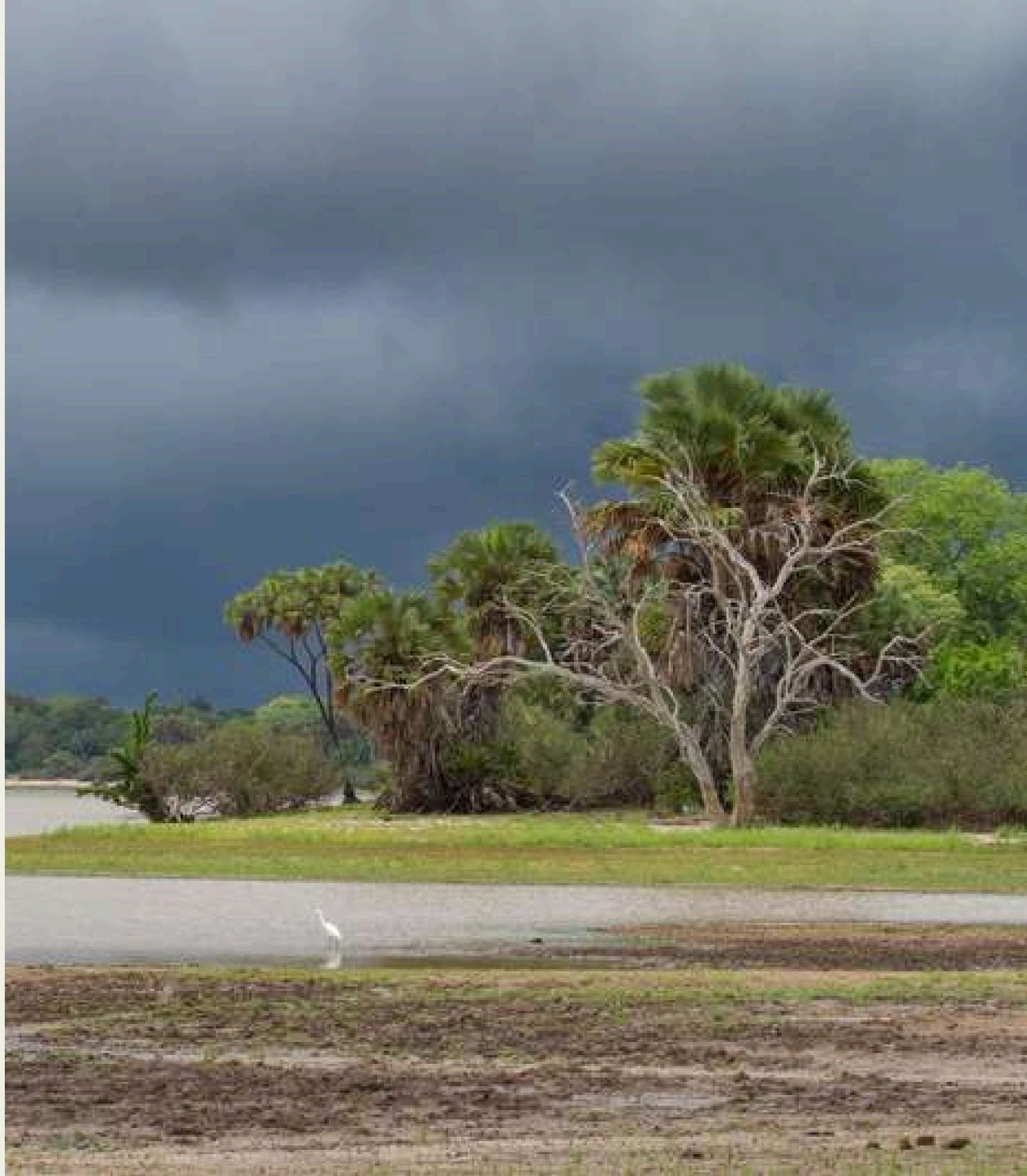
In northern Tanzania’s Simiyu landscape, smallholder farms sit alongside savannah ecosystems that connect to the wider wildlife corridors of the Serengeti and Ngorongoro region. In this landscape, farmers cultivate cotton alongside sunflower and legumes, supporting both local food systems and international supply chains - from textiles to natural ingredients used in the beauty industry.

Remei Tanzania is part of the Switzerland-based Remei Group, operating across Tanzania and India, and a long-standing pioneer in organic and fair cotton systems. Working alongside regenerative organic cotton farmers and local partners, Remei helps strengthen long-term, reliable relationships with smallholder producers. Together with the bioRe Foundation Tanzania, efforts focus on soil restoration, agroforestry, water security, and carbon solutions within smallholder farming systems.

The Tanzanian Organic Cotton Organisation (TOCO), chaired by Riyaz Haider, Founder of BioSustain, and the Kijani Hai Regenerative Production Landscape Collaborative (RPLC) are advancing a more coordinated landscape approach across the region. The RPLC links regenerative agriculture, soil health, and agroforestry practices at farm level with wider landscape outcomes, including water availability, watershed health, biodiversity corridors, and long-term land productivity.

In a landscape where rainfall variability directly shapes yields and livelihoods, strengthening water systems is emerging as a critical foundation for agricultural resilience, health and sanitation - and supply chain stability.

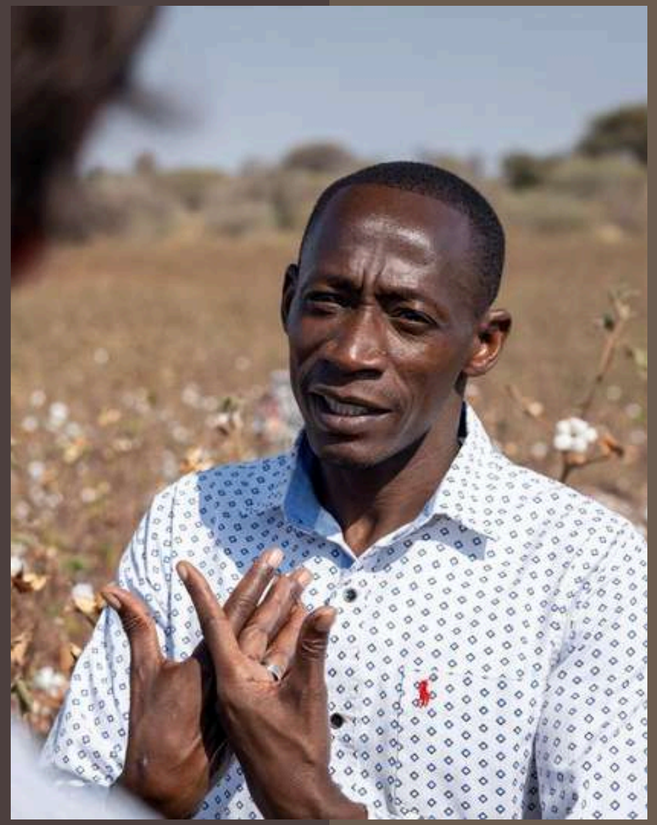
The Discovery Lab creates an opportunity to connect these efforts more fully - linking companies, farmers, and finance around shared data, aligned action, and a roadmap toward a more inclusive and resilient landscape economy.



“These landscapes are shaped by the knowledge and leadership of farmers and communities, especially women, who play a central role in stewarding land and water.”

“Across our work with smallholder cotton farmers, alongside crops such as sunflower, we see that the health of soils, water and biodiversity is inseparable from the long-term viability of supply chains. Investing in regenerative organic agriculture strengthens not only yields, but the resilience of the wider landscape.”

Marco Paul Ngalashu, CEO, Remei Tanzania



In Benin: Ouémé River Basin

In Benin’s Ouémé River Basin, the landscape unfolds as a mosaic of wetlands, forests, shea parklands and smallholder farms, including cotton, that sustain both biodiversity and rural livelihoods.

Africa Green Corporation, an emerging values-driven enterprise, is working with agroecological producers to build ethical and traceable supply chains - particularly in shea and other food crops - connecting production systems more directly to markets. Sacred forests, riverine ecosystems and community-managed parklands reflect a long-standing relationship between people and land, where ecological stewardship and cultural traditions remain closely intertwined.

Across the region, women play a central role in harvesting and trading shea, maintaining the parkland ecosystems on which it depends. At the same time, agricultural systems are navigating the pressures of cotton production, market demand and changing land-use patterns - in a landscape where water systems and seasonal flooding are critical to both agriculture and ecosystem stability.

Local organisations such as L'Organisation Béninoise pour la Promotion de l'Agriculture Biologique (OBEPAB), working with partners including PAN UK, are supporting farmers to explore agroecological approaches that strengthen both farm resilience and landscape health. Alongside this, Africa Green Corporation is developing more sustainable and value-added supply chains, particularly in shea.

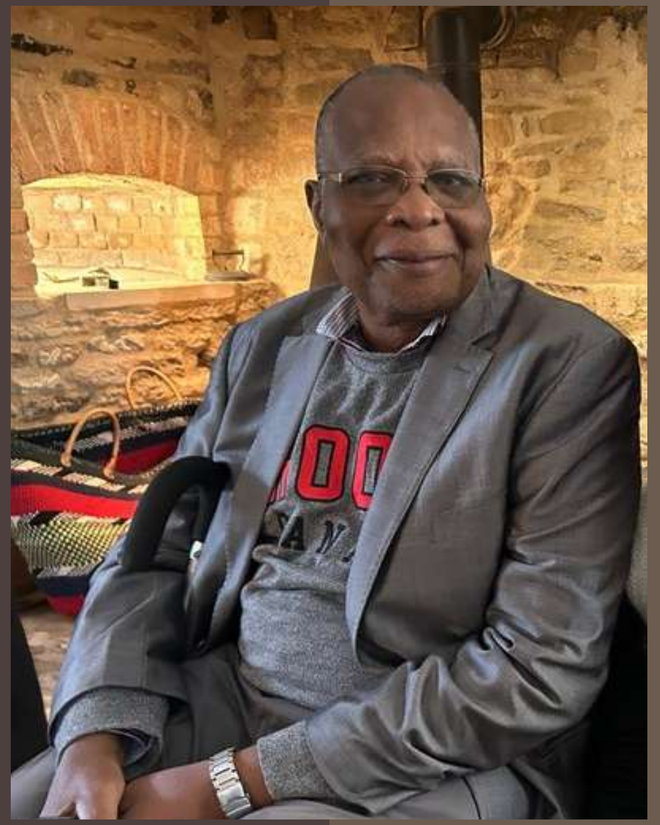
The Discovery Lab creates an opportunity to connect actors across cotton, shea and food systems - aligning agroecological practices, market systems and landscape governance around shared data, coordinated action and long-term resilience at basin scale.

“In Benin, we work across a bioregion where cotton sits alongside shea, cashew and food crops – all connected through shared soils, water and ecosystems.

Agroecological practices strengthen soils, biodiversity and resilience, while wetlands and sacred forests remain essential to both ecology and culture.

Lasting change, however, requires coordination beyond individual farms. Initiatives like the Landscape Discovery Lab help align actors and build collective action across the landscape.”

Dr. Simplice Davo Vodouhe, Founder, OBEPAB



“The future of these landscapes depends on coordinated action across sectors.

Benin’s landscapes are not only productive – they are cultural and ecological systems that sustain communities and livelihoods, from forests and wetlands to farms and river systems that connect people to place and provide habitat for wildlife and migratory species.

Building resilience in these systems also means supporting a green transition – creating opportunities for diversification, strengthening local value chains, and enabling communities to capture greater value over time.”

Laurent Glin, President and CEO, Africa Green Corporation

From exploration to system-level change

The MOS research suggests that landscape collaboration may be approaching a turning point.

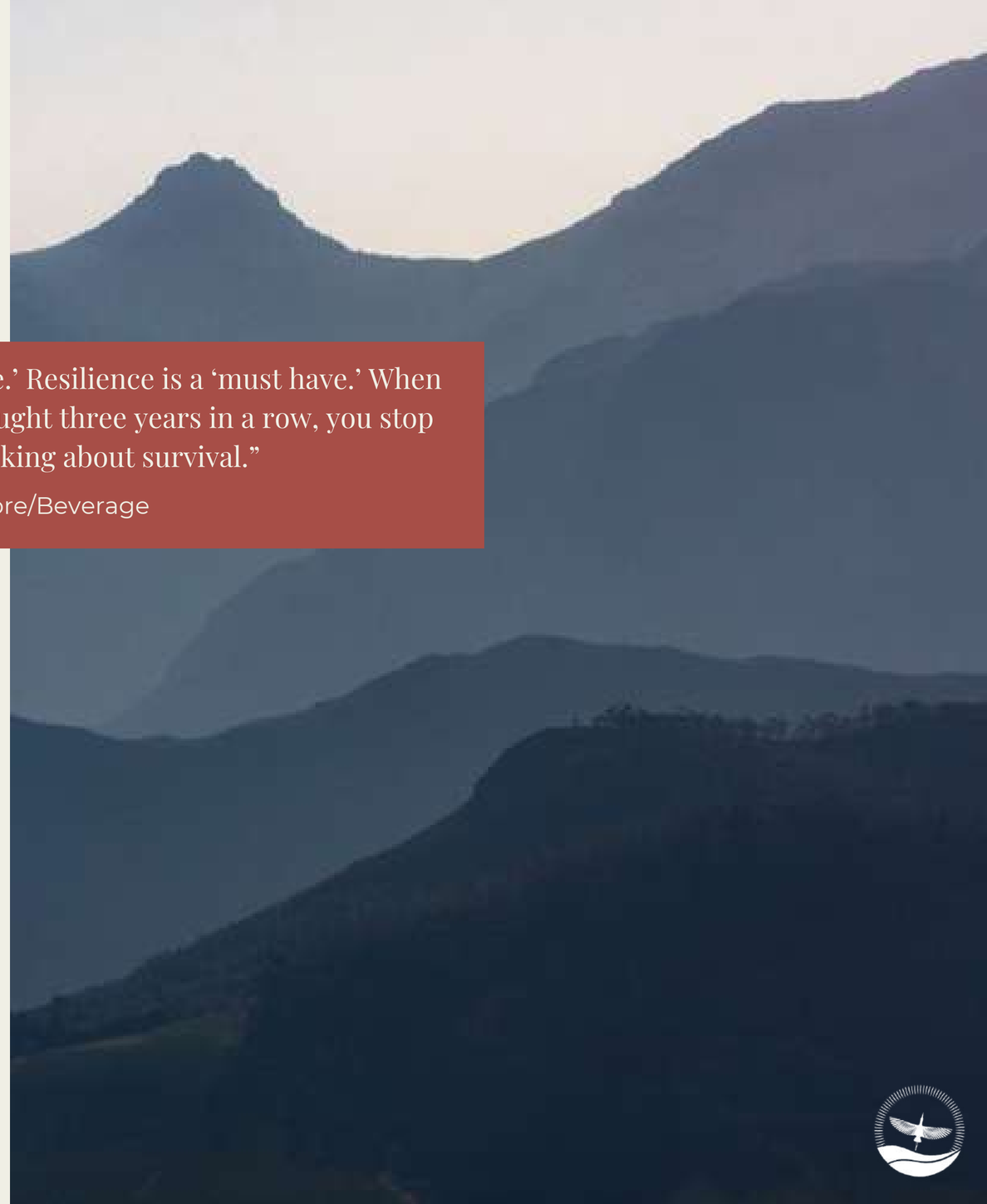
> “Sustainability was a ‘nice to have.’ Resilience is a ‘must have.’ When your supply chain gets hit by drought three years in a row, you stop talking about targets and start talking about survival.”
>
> Very Large Brand/Retailer, Food/Fibre/Beverage

The challenge now is translating this recognition into practical models of collective action - approaches that can work within landscapes while remaining scalable across regions and industries.

Throughout 2026, the Gerana Initiative will convene a series of dialogues bringing together companies, landscape actors and finance practitioners to explore how landscape partnerships can evolve from early experimentation into durable systems of collaboration.

These conversations will be facilitated by Gerana’s dialogue partner Tim Malnick, whose work focuses on leadership development and collaborative inquiry. The dialogue process is being developed in collaboration with knowledge partner LandScale, bringing together insights from landscape practitioners, companies and sustainability frameworks.

If the MOS research is correct, the resilience of global supply systems will increasingly depend on how effectively businesses learn to work with the stewards of the landscapes they depend on.



“Companies increasingly recognise that systemic risks cannot be addressed through isolated corporate initiatives alone.

The six hypotheses highlight where system design is needed. What is encouraging is that many corporate leaders are now actively exploring deeper forms of collaboration across sectors and landscapes.”

Paul Greenep, Business Impact Lead at Gerana and head of MOS analysis

Gerana Initiative

The Gerana Initiative convenes companies to act together where they source - linking supply chain decisions to real landscape outcomes for nature, climate and livelihoods, and building investable, place based pathways for long-term resilience and a just transition.

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