

Survey on expected EUDR effectiveness among stakeholders in the Global South

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Background

From 2026 onwards, companies will have to ensure that under the **Deforestation-Free Products Regulation (EUDR)**, commodities such as soy, beef, rubber, palm oil, coffee, cocoa, and timber and products derived from these raw materials, are not linked to deforestation, if they are to be placed on the EU-market. But amendments or even a postponement of the new regulation are under debate, as are possible effects on global markets and other countries. On the sidelines of the World Climate Conference in Brazil (COP30) in November 2025, Governments, NGOs and producers from 17 Global South countries and the EU came together for the Altamira Summit, a global learning event under the framework of the Team Europe Initiative on Deforestation-Free Value Chains, to take stock of progress towards deforestation-free production and EUDR compliance. 52 participants participated in an inquiry related to EUDR implementation and effects.

Aggregated data

Stakeholder categories: 52 participants took part in the survey. Most of them were from governments and international governmental organizations, among these mostly from GIZ country teams.

Stakeholder category	Number replies
Government	14
International governmental organization	21
NGO/Consultants	10
Producer/Processor	4
Research	1
Trade/Exporters/Importers	2
Total	52

Commodities represented: The highest number of stakeholders relied on being involved in cocoa and coffee production and/or trade. Note: single stakeholders could represent more than one commodity

Commodities represented	N stakeholders
Cocoa	30
Coffee	20
Palm oil	9
Rubber	3
Wood	3
Cattle	11
Soy	11
Involved in all commodities/unspecified	9

Country representation: Most respondents were from Latin America, from Asia there were only 3 participants, which may be due to the travel distance to Brazil. Regional distribution: Africa (9), Latin America (32), Asia (3), EU/global (7), ?? (1)

Countries represented	N participants
??	1
Argentina	2
Bolivia	3
Brazil	12
Cameroon	1
Colombia	3
DRC	2
Ecuador	5
EU (global)	7
Ghana	2
Indonesia	2
Ivory	1
Kenya	1
Malaysia	1
Paraguay	2
Peru	4
Uruguay	1
Zambia	2
Total	52

Preparations for EUDR: Asked about the preparedness for EUDR in their countries on a scale from 1 (not at all) to 5 (nearly or fully complete and ready), governments on average indicated that half (score 3) of what is needed for being prepared had already been achieved. Responses from participants from EU countries are not included in these means, only Global South countries. Note: responses from producers/processors as well as from stakeholders involved in trade should be interpreted with care due to low sample size. The low mean score for producers/processors is characterized by high variation (the 4 single scores are 4; 4; 2; 1).

Stakeholder category (N)	mean for preparation
Gov (13)	3
IntGO (17)	3.2
NGO (9)	3.6
Prod/Proc (4)	2.75
TradeExIm (2)	4.5
Overall mean	3.2

There are large differences in mean preparation scores per country.

Country	N	mean preparation
??	1	3
Ghana	2	5
Argentina	2	4.5
Cameroon	1	4

Colombia	3	4
Ivory	1	4
Kenya	1	4
Malaysia	1	4
Paraguay	2	4
Uruguay	1	4
Peru	4	3.75
Brazil	12	3.25
Ecuador	5	2.8
Bolivia	3	2
Indonesia	2	2
DRC	2	1.5
Zambia	2	1.5
Mean of country means*		3.4

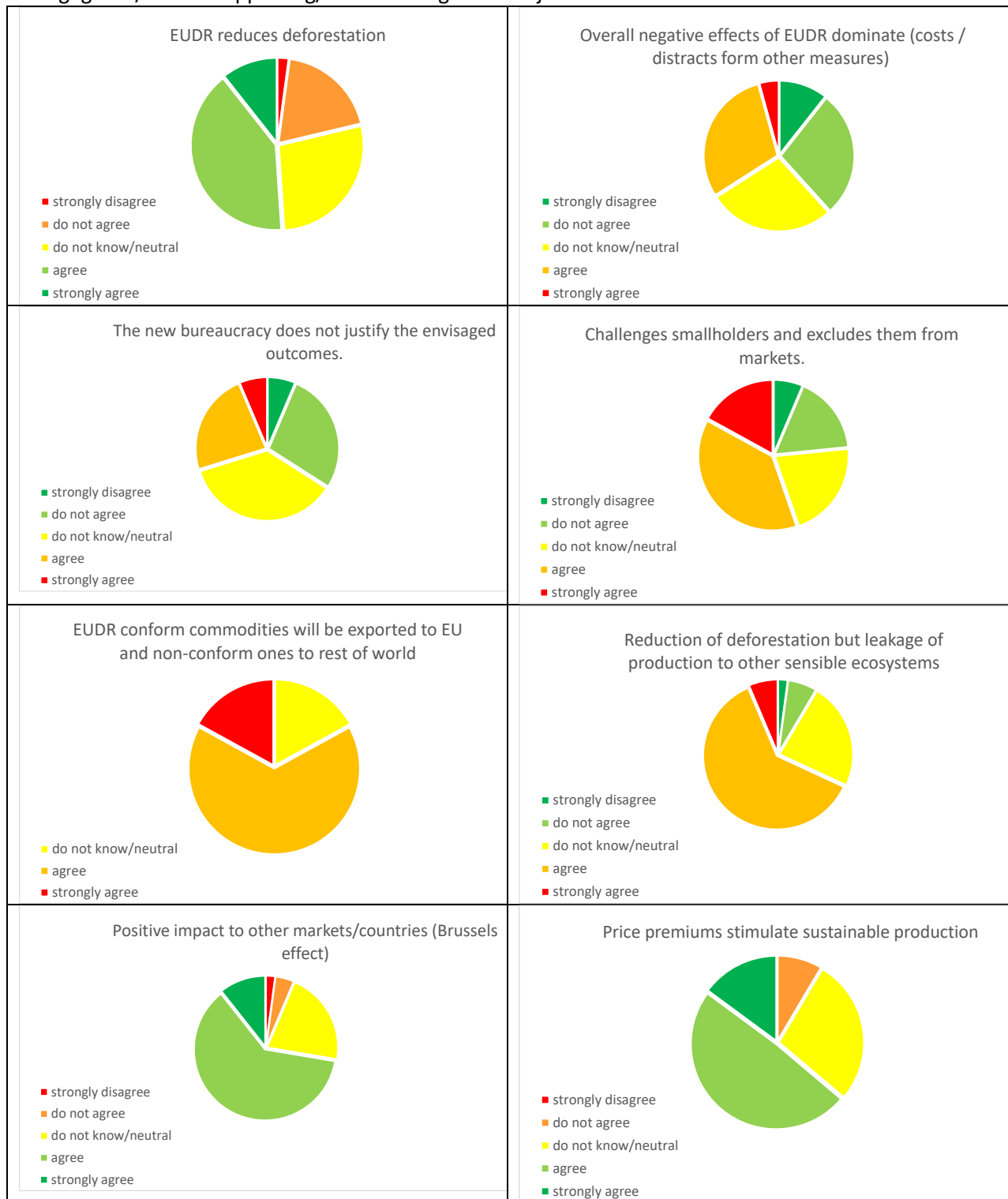
*Mean of country means (pooled means) in order to avoid over representation of countries with more participants.

Synergies of preparations with national policy instruments: Asked about synergies of EUDR preparations in the countries on a scale from 1 (strong antagonism) to 5 (strong synergies) all participants responded with scores from 3 to 5.

Country	N	mean synergies
??	1	5.0
Argentina	2	5.0
Malaysia	1	5.0
Uruguay	1	5.0
Colombia	3	4.3
Brazil	12	4.3
Peru	4	4.3
Bolivia	3	4.0
Cameroon	1	4.0
DRC	2	4.0
Ivory	1	4.0
Zambia	2	4.0
Ecuador	5	3.6
Ghana	2	3.5
Indonesia	2	3.5
Paraguay	2	3.5
Kenya	1	3.0
Mean of country means*	45	4.1

*Mean of country means (pooled means) in order to avoid over representation of countries with more participants.

Expected effects: Survey results from 45 representatives from governments, international organizations, producers, and NGOs in 16 Global South countries directly involved in preparations and implementation of EUDR related measures, as well as 7 participants from governments and administration in the EU. Color coding: green/red for supporting/contradicting EUDR objectives.



Annex: Questionnaire

EUDR status and effects inquiry - GIZ SAFE Altamira EUDR Summit, 2025

Rationale: While on high level policy levels the debate on EUDR implementation is still ongoing, the regulation has gained momentum in many producer countries; in many cases under controversial debates, but as well with substantial efforts, new tools and initiatives. Whether the EUDR is perceived as risk or opportunity may depend on the stakeholder group and context. Updated status information, as well as current perceptions and opinions can help to steer further implementation. The Altamira summit is an excellent opportunity to collect such signals and thus contribute to a participatory development of EUDR.

The EUDR Effects Project of Thünen Institute captures potential Effects of the EUDR. We would be grateful for your support by answering a few questions

To which stakeholder group do you belong
(one answer)

- ☐ Government
- ☐ Producer/processor enterprise or association
- ☐ Trade/export/import enterprise or association
- ☐ Other NGO (national or international)
- ☐ International govt organization
- ☐ Research

Which commodity do you represent/mainly deal with (multiple answers)

- ☐ All/not one specific commodity
- ☐ Cattle
- ☐ Cocoa
- ☐ Coffee
- ☐ Oil palm
- ☐ Rubber
- ☐ Soya
- ☐ Wood

Which country do you represent (text) _____

How well will technical tools for geolocation, traceability and due diligence statements be prepared until end 2025 to implement EUDR (one answer)

- ☐ hardly, not at all
- ☐ few tools or preparations
- ☐ approximately half of what would be needed
- ☐ on a good way, mostly ready
- ☐ nearly or fully complete and ready

Most countries already have a complex mix of national policy instruments in the land use sector. How do new traceability and geolocation instruments relate to and influence the existing national instruments in your country (one answer)

- Strong synergies (new instruments rely on existing instruments and support them)
- Some synergies
- Not much relation, independent
- Some national instruments are hampered to some others there are synergies
- Some antagonism
- Strongly antagonistic (new instruments distract from national instruments and block them)

How strong do you perceive support for EUDR by various stakeholder groups in your country (one answer)

- Clearly positive and strong support
- mostly positive
- controversial discussions but productive and creative
- controversial discussions hamper or even block further development
- not much debate, neutral
- mostly negative
- clearly negative and strong rejection

Anticipated effects. Of course, implementation will bear challenges and be turbulent at the beginning. But assuming EUDR starts in 2026 which effects to you expect after 2 – 3 years (tick from 1 strongly disagree, 2 agree, 3 do not know/neutral, 4 agree, 5 strongly agree)

1	2	3	4	5	
					Price premiums or competitive advantages stimulate sustainable production
					EUDR conform commodities will be exported to EU and non-conform ones to the rest of the world
					There will be reduction of deforestation but leakage of production to other sensible ecosystems
					The new bureaucracy does not justify the envisaged outcomes
					Challenges smallholders and excludes them from markets
					There is positive impact on other markets, that will also increase ecological requirements (Brussels effect)
					Overall negative effects dominate (e.g. just increase of costs, mostly distracts from other more effective measures)
					EUDR will help to reduce deforestation and degradation in my country/non-EU

Any other recommendation, comment