

Cultivating Resilience: Regenerative Agriculture

An EIT Food Consumer Observatory
study on European consumer
perceptions of regenerative agriculture



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Key takeaways and recommendations



Key takeaways I



Regenerative agriculture is associated with a lower or potentially net positive environmental and social impact¹. But it takes effort, time and financial investment for farmers to switch to regenerative practices. If there was a clear consumer preference for products produced through regenerative practices, the benefits in switching would be clearer for farmers and the risks smaller. This study investigates how European consumers currently perceive regenerative agriculture and how consumer preference can be created.

The key takeaways of the study include:

Consumers do not see the need to transform current agricultural practices

- Many European consumers view conventional (modern) agriculture with admiration and as a source of national pride, and the downsides are not widely recognised. But if prompted to compare conventional agriculture to regenerative agriculture, their impression of conventional agriculture becomes less romanticised and idyllic in favour of regenerative agriculture.
- Consumers do not think too much about the different agricultural methods that grow or produce their food, but at the same time are concerned with chemicals in food and the quality of produce. This means there may be a demand for regenerative agriculture products in the future.

Most know or can guess what regenerative agriculture is, but also confuse it with organic agriculture

- Consumers recognise that for agriculture to be regenerative, biodiversity needs to be promoted through crop rotation, chemical pollution needs to be limited and farming processes need to be as natural as possible, including limiting the use of machines, and letting foods grow at a slower, natural rate.
- Many consumers who believe they know about regenerative agriculture are synonymously thinking about organic agriculture. For them regenerative agriculture is difficult to distinguish from organic agriculture.

Key takeaways II

Consumers intuitively feel that regenerative agriculture is the better form of agriculture (when compared to conventional agriculture)

- When prompted, the majority of consumers recognise that there are (large) differences between conventional agriculture and regenerative agriculture.
- European consumers believe in the ability of regenerative agriculture as an ecosystem service, to heal the soil, limit environmental damage (or even reverse it) and its role in producing foods that are good for them and the planet. But given the positive perceptions of conventional agricultural practices, this is currently not a motivator to prefer products produced through regenerative agricultural practices.
- Except for a select few, consumers see no reason to believe that the concept of regenerative agriculture is a marketing gimmick or a greenwashing term to increase sales and drive-up food prices.

Health and taste are the biggest drivers and possible triggers to consume food products produced through regenerative agricultural methods

- Health and taste are the two most important attributes that lead to the perception that regenerative agriculture produces high-quality food. The quality perception is enhanced through the (perceived) environmental benefits and improved animal welfare of regenerative agriculture.
- Those that already consume organic products have experienced the taste benefit with organic foods firsthand, and similarly believe that products produced through regenerative agricultural methods will have more concentrated flavour profiles.

The large majority are convinced that products produced through regenerative agricultural methods are healthier than the food products they generally buy. This perception comes from believing that regenerative agriculture products are:

- Produced without chemicals, pesticides and artificial fertilisers.
- More nutrient dense (vitamins and minerals) because the soil is healthier, and crops have more time to grow in the healthy soil.

Key takeaways III

The foods are more natural (including non-GMO)

- Regenerative agriculture is most relevant for fresh produce like vegetables, fruits, but also animal products like eggs and dairy. This is because consumers believe these foods will nutritionally benefit most from regenerative agriculture.
- With (ultra-)processed foods, consumers generally care much less whether the food is produced through regenerative agricultural methods or not. They feel it will be too difficult to tell whether the foods are produced regeneratively and they feel that they should be eating less of these foods.

Lack of scale and high prices are main concerns about regenerative agriculture

- When European consumers think about regenerative agriculture, they have a misperception that regenerative agriculture is only relevant for and applicable to small-scale or local farms. Therefore, many are not convinced that transitioning to regenerative agriculture will lead to increased food security.
- European consumers are convinced that food prices will be higher if the food system transitions towards regenerative agriculture.

Regenerative agriculture is beneficial for farmers in the long-run, but difficult in the short-term

- Consumers feel that farmers are continuously blamed for environmental problems and acknowledge that an agricultural transition should not be the farmers' sole responsibility.
- In the long-term, consumers believe that the transition towards regenerative agriculture will be beneficial for farmers, as their land would be restored, eventually leading to higher yields.

Consumers want to understand regenerative agriculture better

- European consumers especially look for information that verifies their food is free from 'chemicals', which is partially what pushes them towards buying organic foods, and possibly also foods produced through regenerative agricultural methods in the future.
- Consumer would like to understand the differences between regenerative agriculture and organic practices. From their perspective, it would make more sense for organic foods to also be regenerative, as it is difficult for consumers to distinguish them.

Recommendations I

In order to stimulate consumer demand for products made by using regenerative agricultural practices, applying the following guidelines will help generate support from consumers.

Tell a compelling story about the advantages of regenerative over conventional agriculture

- Create a sense of urgency for regenerative agriculture by creating awareness about the environmental issues agriculture is currently facing. At the same time promote the advantages of regenerative agriculture compared to conventional agriculture, such as healthier soil.
- As consumers believe that products from regenerative agriculture are healthier because of lack of chemicals and tastier because of more nutrient-rich soil, it is imperative to conduct more research and finding out if these expectations match reality. Communication strategies can eventually make use of these perceptions, without greenwashing.

But avoid blaming farmers for the drawbacks of conventional agriculture

- Consumers sympathise with farmers and mostly do not hold negative beliefs towards them and their conventional way of producing food. When discussing the drawbacks of conventional agriculture it is important to discuss the importance of policy changes that are necessary to encourage farmers to farm more sustainably.

Use a consumer centric definition for regenerative agriculture that includes product-level benefits

- To effectively communicate the concept of regenerative agriculture to consumers, it is important to use a consumer-centric definition that resonates with their values and concerns. The existing definitions in academic and agricultural literature often focus on technical aspects and environmental benefits, which might not fully engage the average consumer.
- Consumers understand that soil health influences food quality, but they also need to understand the specific benefits regenerative agriculture brings to the final food product. When communicating the benefits of regenerative agriculture, it's crucial to focus on the tangible advantages at the product level rather than the production process. Consumers are less interested in the technical aspects of agriculture and more attracted to direct benefits such as improved taste and enhanced nutritional value of foods.

Recommendations II

Explain the differences between organic and regenerative

- Focus on explaining how regenerative agriculture offers additional benefits to consumers compared to organic agriculture. For instance, consumers need a compelling explanation of regenerative agriculture being an ecosystem service, and how this affects the nutrient density of their food (a perceived benefit that organic foods may not offer).

Address the concerns: it is possible at scale, will farmers benefit, and will prices rise?

- Consumers need to be informed on how regenerative agriculture can produce food at a large enough scale to feed the world. For example, by highlighting the yield that regenerative agriculture can produce in the long term, particularly in comparison to conventional agriculture.
- Consumers need evidence from farmers themselves that farmers benefit when they transition. Testimonials and success stories directly from farmers, emphasizing the benefits they have experienced such as improved soil, better yields, fewer pests or plant disease. Furthermore, consumers want to be reassured that farmers will not bear the brunt of transitioning to this way of agriculture. They want to know that farmers will be supported, for example through subsidies, collaborations with retailers, or other support systems that will offset initial costs.
- Consumers may accept higher prices for foods produced through regenerative agricultural methods, as long as the price point is not higher than the price of organic food. If prices do end up being higher than organic foods, consumers need to understand and be persuaded about the additional benefits of regenerative agriculture beyond those of organic foods.



Introduction



Introduction

Regenerative agriculture is associated with a lower or potentially net positive environmental and social impact¹.

Regenerative agriculture has garnered substantial momentum in recent years, attracting the attention of producers, corporates, researchers, consumers, politicians, and the mainstream media alike^{1,2}. However, widespread adoption of regenerative agriculture among farmers and awareness among consumers remain limited.

Companies lack sufficient consumer insights to develop successful go-to-market strategies for products produced through regenerative agriculture, and policymakers struggle to standardise regenerative agriculture legislations, partly because there is no clear definition that resonates with consumers. In other words, the consumer perspective is currently lacking.

Through this qualitative study we set out to understand current consumer perceptions and knowledge of regenerative agriculture, which elements of regenerative agriculture they find most appealing and how regenerative agriculture can become more widely sought after by consumers. The data was collected from 81 respondents in the Citizen Participation Forum, an online community with around 300 members from 17 countries.



Regenerative explained

There is no officially recognised and universally accepted definition of regenerative agriculture at this moment. Definitions are currently based on visions of scientists, farmers, and practitioners, but the consumer's perspective is overlooked^{1, 5}. Rather than being characterised by specific farming methods, regenerative agriculture is guided by principles.

Scientific literature about regenerative agriculture address different issues, from soil health, to climate change, at different scales ranging from a local farm, to the entire food system. Still, there seems to be a consensus among scientists that regenerative agriculture is an ecosystem service, and that regenerative agriculture should prioritise soil conservation, but also the social and economical dimensions of food production. A paper reviewing 28 studies on regenerative agriculture proposed the following definition:

*“Regenerative agriculture is an approach to farming that uses soil conservation as the entry point to regenerate and contribute to multiple provisioning, regulating and supporting services, with the objective that this will enhance not only the environmental, but also the social and economic dimensions of sustainable food production”.*⁵



Main principles of regenerative agriculture

EIT Food summarises five main principles of regenerative agriculture⁶:



1. Minimising soil disturbance



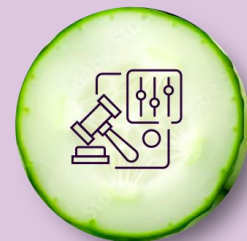
2. Minimising the use of chemical inputs



3. Maximising biodiversity, both animals and plants



4. Keeping the soil covered with crops as long as possible



5. Adapting to the local environment

To standardise regenerative agriculture for certifications, legislations, and a go-to-market strategy for corporations, it is necessary for producers to know what it means to be regenerative – and for consumers to understand and recognise it too⁷.

The definitions, principles, and themes of regenerative agriculture also need to be reflected in a code of practice⁷.

Knowledge and awareness of regenerative agriculture



Consumers do not see the need to transform agricultural practices

Many European consumers view conventional (modern) agriculture with admiration and as a source of national pride. Monoculture fields are romanticised as being beautiful and peaceful, while also symbolising technological advancement.

Few mention the downsides of modern agriculture (e.g., impact on the environment), and, generally, European consumers do not feel that a transformation is necessary when they think of agriculture.

"When I think of agriculture I think of the idyllic fields with corn waving in the wind. The rural landscape." Poul, 49, Denmark



Most can correctly guess what regenerative agriculture is

A large group claim to have heard of regenerative agriculture before, at least by name. Many say they recognise the term from the news, through word-of-mouth from friends or family members that work as farmers, and some through social media.

However, the group of consumers that accurately know what regenerative agriculture is, is much smaller. Many mentioned the concept 'organic', as a prerequisite of what regenerative agriculture needs to be. So, it is important to note that many consumers who believe they know about regenerative agriculture are synonymously thinking about organic agriculture. This is particularly noticeable with consumers that buy food from farmer's markets or directly from small-scale farms.

Another large group mentioned that they had never heard of the term regenerative agriculture before. Even then, most could guess, based on the word 'regenerate', that the soil and the environment needs to heal. Consumers recognise that for agriculture to be regenerative, biodiversity needs to be promoted through crop rotation, that chemical pollution needs to be limited and that farming processes need to be as natural as possible, including limiting the use of machines and letting foods grow at a slower, natural rate.



Consumers believe regenerative agriculture is significantly different from conventional agriculture

Unprompted, consumers do not think about the different agricultural methods that grow or produce their foods. While consumers generally have a positive impression of conventional agriculture when asked, if prompted to compare conventional agriculture to regenerative agriculture, their impression of conventional agriculture becomes less romanticised and idyllic in favour of regenerative agriculture.

When prompted, the majority recognise that there are (large) differences between conventional agriculture and regenerative agriculture. Consumers intuitively feel that regenerative agriculture is the better form of agriculture, even before the concept was explained to the participants. Only about a fifth find the two agricultural methods to be (very) similar, not recognising one as better than the other. This group still admitted that they find it very difficult to discern between different types of agricultural methods. Still, it was clear that consumers do not usually think about how their food is grown or produced in their day-to-day lives.

"Regenerative agriculture is good for the planet and the people and the food will taste better than the other mass produced stuff." - Karsten, 59, Germany

"I've heard of multiple terms in agriculture before but it's difficult to really understand the difference between the multiple forms of agriculture. Agriculture is a hot topic in the news in the Netherlands because of its sustainability and output of CO2, I'm guessing that's where I've heard of it." - Ferry, 33, Netherlands



And recognise that regenerative agriculture has many benefits

The biggest benefits of regenerative agriculture that consumers recognise are environmentally friendliness, animal welfare and the fact that foods produced through regenerative agricultural methods are of high quality.

European consumers believe in the ability of regenerative agriculture as an ecosystem service, to heal the soil, limit environmental damage (or even reverse it) and its role in producing foods that are good for them and the planet.

Except for a select few, consumers see no reason to believe that the concept of regenerative agriculture is a marketing gimmick or a greenwashing term to increase sales and drive-up food prices.

Consumers believe that regenerative agriculture is beneficial and want to see efforts to make it a success supported.



"Supporting soil life, encouraging plant diversity and increasing biodiversity, can contribute to improving the nutritional value and quality of food. So, the food will be healthier based on these terms." - Tamas, 35, Hungary

However, experience with regenerative agriculture is limited

Around one in five consumers believe they are mostly or always buying foods from regenerative sources.

This is very likely an overestimation, as many use the concept synonymously with the word organic and believe that all foods sourced from local farms are sustainable and regenerative. Most European consumers also have the most experience with consuming organic foods, where around more than a third either always or mostly choose organic foods.



"In my opinion, this regenerative agriculture is not a marketing ploy at all. You can also call them something else; ORGANIC farming, nature agriculture etc. Back to the roots. Less profit, listen more to nature. Take more care of nature." - Raymond, 46, Switzerland



Drivers and possible triggers



Foods produced through regenerative agricultural methods must be healthier...



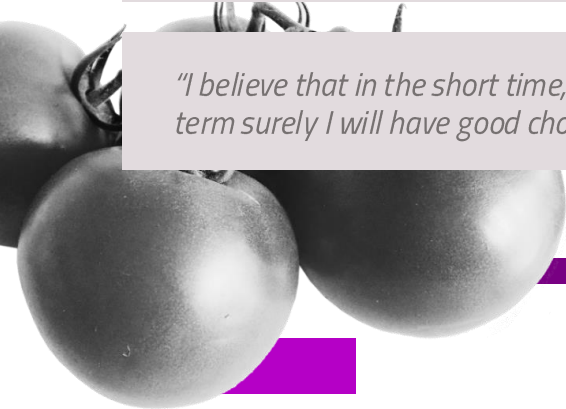
The large majority are convinced that products produced through regenerative agricultural methods are much healthier than the food products they generally buy.

Consumers believe their health will improve, that this is reflected in their blood tests (some even believe that their cholesterol would be affected), and that their skin (and even organs) would look and 'feel' better. This perception comes from believing that products produced through regenerative agricultural methods are:

- Produced without chemicals, pesticides and artificial fertilisers.
- More nutrient dense (vitamins and minerals) because the soil is healthier, and crops have more time to grow in the healthy soil.
- The foods are more natural (including non-GMO)

"Because they don't use pesticides. Also, the soil is healthier and richer with nutrients. And will make it tastier." - Michael, 33, Netherlands

"I believe that in the short time, I will recognise any benefits of my health, but in the long term surely I will have good cholesterol, glucose." - Alina, 34, Romania



...and tastier too

Participants also believe that foods produced through regenerative agricultural methods will be much tastier. Those that already consume organic products have experienced this benefit with organic foods firsthand, and similarly believe that products produced through regenerative agricultural methods will have more concentrated flavour profiles.



"I would expect fruits and vegetables to taste better, stronger and less watery if the soil itself is more healthy and nutritious." - Kamilla, 29, Hungary

Products sold in conventional supermarkets are said to be watery and flavourless (such as tomatoes), in contrast to how consumers remember foods used to taste like when agriculture was not as intensified and commercialised. Only a select few believe that there would be no significant difference in taste if food is produced through regenerative agricultural methods.

"I believe it will taste better for the most part with regenerative agriculture. I compare with the organically [produced]. Some vegetables [are] much better like carrots. I always buy organically because of the taste and some other vegetables as well"
- Karina, 59, Denmark



Regenerative agriculture produces high-quality foods

Generally, European consumers believe that regenerative agriculture produces high-quality food products.

The perception of higher quality foods is primarily driven by the combination of health and taste benefits. Additionally, the environmentally sustainable practices and emphasis on animal welfare in regenerative agriculture further enhance the perception of superior quality in these products.

Other studies have also found that environmental friendliness (indirectly) leads to the perception of higher quality foods¹³.

“For me the importance in regenerative agriculture and its foods is that they are of better quality than other products currently, better for the planet as well as insects and animals and of course better for our health, if I see foods produced by regenerative agriculture, I would certainly buy some” - Ismail, 48, France



Regenerative agriculture is most relevant for fresh produce...

Despite the perceived benefits of regenerative agriculture, European consumers do not need all types of foods to be grown through regenerative methods. Regenerative agriculture is most relevant for fresh produce like fruits and vegetables. This is mainly because consumers believe that they (should) consume a lot of these foods and that these foods will become even healthier and tastier by being produced regeneratively.

Consumers are also worried that healthy foods (like vegetables and fruits) are becoming less nutritious and healthy through intensive, commercialised agriculture. Many believe that fruits and vegetables used to be healthier through traditional farming methods, and hope that regenerative agriculture will restore these benefits.

"I think vegetables are a lot important, from my youth during the 1960s I strongly remember that vegetables like carrots tastes so well, lovely and desirable to me that I wanted to eat them. I drove with my bicycle to our shop and bought them. Today most vegetables taste like...I don't like them any more...how nice to say...shitty, tasteless and not desirable in any way. Would be so good to have good food that is tasty, and I suppose regenerative agriculture could make a big change." - Kartsen, 59, Germany



...including animal products

Regenerative agriculture is also highly relevant for animal products like meat, dairy, and especially eggs. This is not only because consumers believe that the quality of these products will be better (taste, health and environmental benefits), but also because they are convinced that animals reared through regenerative agricultural practices will lead healthier, happier lives.

Consuming animal-based products produced through regenerative agricultural methods will likely make European consumers feel better about themselves and help them feel like they are making a positive impact.

"I think animals can have normal life, they are not so closed in cages, buildings but they have more open space. They are more happier because they can enjoy sun, green grass. Maybe its not more safe for them but their life is more colourful. They will be not so depressed. Regenerative agriculture is animal-friendly because no chemical feed is used to feed them and they have more freedom, not being confined to cages and buildings." - Anna, 34, Poland



But regenerative agriculture is much less relevant for processed foods

With (ultra-)processed foods, consumers care much less whether the ingredients are produced through regenerative agriculture or not.

This is because:

- They recognise that they should be eating fewer of these (unhealthy) foods
- Regenerative agriculture will likely not make a significant enough difference when the ingredients are inherently unhealthy (e.g., saturated fats),
- It is already hard enough to tell how healthy each ingredient of a product is, so it will become excessively complicated to also check how each individual ingredient is grown or produced.

Consumers do however care more about chocolate being produced through regenerative agricultural methods than, for example, sweets and candy. This is likely because of the media attention the cacao industry is getting, combined with awareness of the industry's problems (e.g., deforestation).

"I always choose regenerative agriculture when the food is not processed, for example fruit. If the food is processed, it's very difficult to be sure that the ingredients are from regenerative agriculture."

- Paula, 51, Poland

"For some reason it doesn't bother me that much to buy ultra processed food that hasn't been produced with regenerative agriculture. 'Pure' ingredients, like meat and vegetables I would definitely prefer to buy from the brands that are producing ingredients with regenerative agriculture."

- Hannah, 31, Finland



Concerns about regenerative agriculture



Scalability of regenerative agriculture is underestimated

When European consumers think about regenerative agriculture, they have a misperception that it is only relevant and applicable to small-scale or local farms. Because of this, many are not convinced that a transformation towards increasing regenerative agriculture will lead to increased food security.

Consumers believe that more land and time is required for regenerative farming methods, which is not always available. Additionally, consumers wonder whether small(er)-scale farms that use regenerative agricultural practices can compete with larger companies that continue to produce food through conventional practices.

"My question is: is it enough to produce like this for all of the people on the world? I understand that this is a sustainable method and good for the planet, but can we hold on with this method to produce enough food for everybody?" - Tamas, 35, Hungary



Prices are expected to soar

European consumers are convinced that food prices will be higher if the food system transitions towards regenerative agricultural practices. Those that don't think so, believe that technological advancements will counteract any shortcomings of regenerative agriculture that lead to high prices.

The participants do not, however, expect that food prices for regenerative agriculture produce will be higher than the price of organic products. And as many are currently buying organic foods regularly, those are also prepared to pay for food products produced through regenerative agriculture, given the high quality (and social benefits). But if prices do end up being higher than the prices for organic foods, it is unlikely that consumers will be willing to pay for it.



Farmers will bear the brunt of the transition, especially in the short-term

European consumers have a lot of empathy for farmers. They recognise that farmers have faced difficulties and pressures to transition towards sustainable practices, while at the same time having to please retailers and other authorities. For this reason, many consumers are prepared to support farmers by shopping at farmers' markets, organic stores and other specialty stores like butchers.

For the long-term, consumers believe that a movement towards increased regenerative agriculture will be beneficial for farmers, and would therefore make the effort to support regenerative farmers. Though, for the short-term, if farmers were to transition towards regenerative agriculture consumers are worried about:

- Whether producing food through regenerative agricultural practices will lead to high enough yields and profits for farmers or food producers,
- Whether regenerative farmers can compete with conventional food producers,
- Whether farmers will be forced or incentivised to transform their agricultural practices towards regenerative agriculture, and who is going to pay for that transformation.

"But once again, the farmer does his best to adopt a more ecological attitude, but it is up to us, consumers, to help him by consuming better. And we must not lose sight of the fact that the farmer must be able to make a decent living from his work."

- David, 47, France



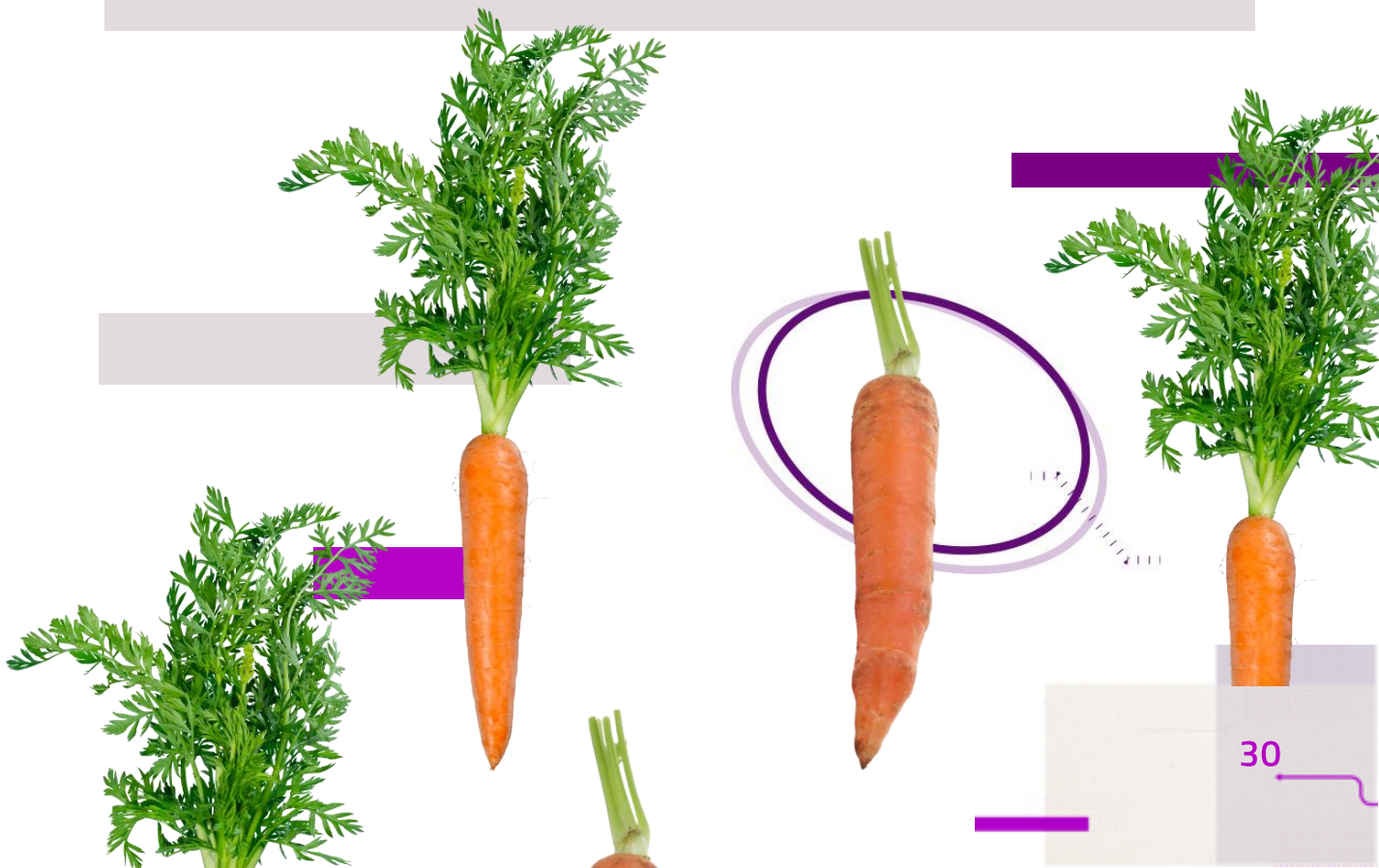
Produce won't look as pretty

A small group is worried about how food will look if it is produced through regenerative farming methods, especially because they know that the 'perfect' looking options are available too (in conventional supermarkets).

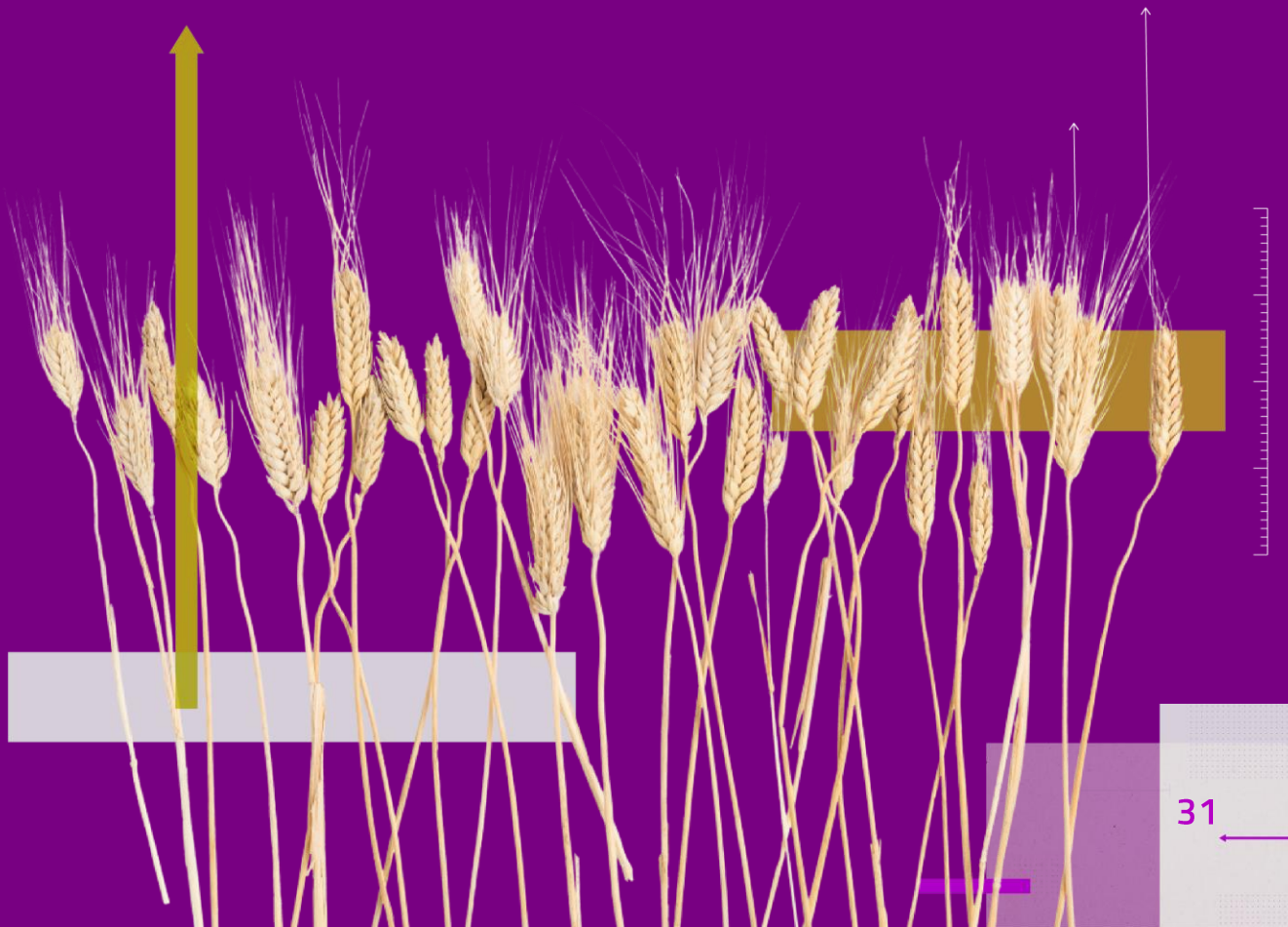
Most know, however, that imperfect produce is more 'natural' and better for their health and the environment. Still, they find it difficult to choose the less 'perfect' looking products when the perfect ones are an option too.

*"I expect mostly seasonal fruits and vegetables that may be less beautiful or less colorful but above all more natural..." - **Nathy, 50, France***

*"If the products either become much more expensive or look less attractive, they probably won't end up in my basket. If, on the other hand, the products appear delicious and inviting, I will probably buy the products." - **Hanne, 57, Denmark***



Consumers have an appetite for more information



Consumers don't know what they're eating

Many consumers do not know or understand how their food is grown or raised, what kinds of technologies are used, what chemicals (e.g. fertilisers, pesticides) are involved, and how these affect their health. At the same time consumers are dissatisfied with how little they know. If it was made easy for them to find out more, consumers would appreciate additional information.

Consumers look for information about a product by searching for a logo, looking at the label, or asking the producer (or seller) directly. Still, these are insufficient sources, as consumers do not trust all logos nor do the labels indicate how the food is grown (except for when it is organic), if consumers did want to find out.

Furthermore, quite a few participants have mentioned that their local (organic) food producers have said that they practice regenerative agriculture. While they may be using regenerative agriculture practices within their farms, the term is not protected, nor is there an official certification logo.

So, while consumers may believe they are eating products produced using regenerative methods, no one can be sure that they are. It is therefore very difficult for consumers to find information, and currently nearly impossible to know whether a food is produced through regenerative agriculture practices or not.

"I should visit local market. I should look for signs like no pesticides or ask people on local markets who make food and sell them." - Malgorzata, 29, Poland

"I think a lot of detective work is needed to find out. If it is not displayed on or with the product or cannot be found via the codes, then it is difficult. Perhaps the organic shop has not labelled anything here either. Even if it is labelled, who can tell me if I can believe it? Ah, at a vegetable market where the grower sells, I would still have a chance to find out." - Wolfram, 70, Switzerland



Organic labels have won consumer's trust

Consumers feel at ease with organic foods. They have the impression that organic foods are labelled clearly and therefore provide a lot more information than other food products.

Time is needed to build up the same level of trust and recognition for foods produced through regenerative agricultural methods, and labels will need to provide the same level of information organic labels provide:

- An easily recognisable logo, which is independent and trustworthy (e.g. at EU level).
- Information about where the product is grown or produced



Regenerative agriculture produces 'clean' food, much like organic agriculture

European consumers especially look for information that verifies that their food is free from 'chemicals', which is partially what pushes them towards buying organic foods, and possibly also foods produced through regenerative agricultural practices in the future.

Consumers are particularly afraid of unnatural 'chemicals' but do not seem to distinguish between the words 'fertilisers', 'pesticides', 'herbicides', 'insecticides' etc. The participants grouped these words together, often under the words 'unnatural chemicals'. Information on the product label that explicitly states that the food was grown without such chemicals is wished for by consumers and would simplify their search for information.

The organic certification is currently perceived by consumers as a signal that foods are free of such chemicals. Products produced using regenerative farming methods would benefit from explicitly signalling the same.

"Why not just go organic. Many of the principles sound like organic farming. Does it use pesticides? I like the idea and maybe it is a good idea to go towards organic farming without going all the way. The principles of taking care of the soil and not using chemical pesticides sound much like organic farming." - Poul, 49, Denmark



But regenerative agriculture benefits beyond organic are unclear

Consumers believe that foods produced through regenerative agriculture are healthier, tastier, and better for the environment and animals. Consumers also believe that food produced via regenerative methods can be bought at conventional supermarkets as well as specialty stores, and that foods produced via regenerative agricultural methods are generally 'clean' and free from artificial chemicals. However, consumers believe the same of organic products. The benefits of food produced via regenerative agricultural methods beyond organic products is therefore unclear to European consumers.

While regenerative agriculture actively restores soil health and can be perceived as 'going further than organic' in terms of production, consumers do not pay attention to soil health when they are buying food. Consumers therefore do not see how regenerative agriculture is better than organic agriculture, and for now see little reason to buy products produced through regenerative farming rather than choosing organic products.

Additionally, it took time for consumers who (now) shop organic to recognise the benefits of organic food and integrate it into their lifestyle. Now with the introduction of regenerative agriculture, consumers feel like their efforts to live more sustainably are yet again 'not good enough'. This can perpetuate a cycle of new guilt feelings with green innovations and could mean that efforts to improve the systems that are already in place, like the organic food system, are disregarded when there is still ground left to gain.

"I would like to know the differences between regenerative agriculture and organic agriculture since it is something that I am not clear about." - Solange, 44, Spain

"Even our organic food is not regenerative agriculture? How?" - Xenia, 37, Belgium



About the study



Aim and purpose of the study

For regenerative agriculture to be successful and for the products produced on regenerative farms to get cut-through on the market, there needs to be consumer acceptance. Understanding who will be interested in such products, as well as where, when, and why, is crucial for positioning these products effectively.

With this study we wanted to gain deeper insight in consumer awareness and attitudes towards regenerative agriculture. We explored motivations, abilities, and prompts that encourage selecting these products. Additionally, we identified the criteria consumers deem significant regarding regenerative agriculture certifications, with the aim of aiding regenerative agriculture in achieving standardisation for legislative purposes and promoting its use.

To our knowledge, these topics have not been studied so far, allowing us to add knowledge to the existing body of insights. Both topics are directly related to possible go-to-market strategies for the industry.

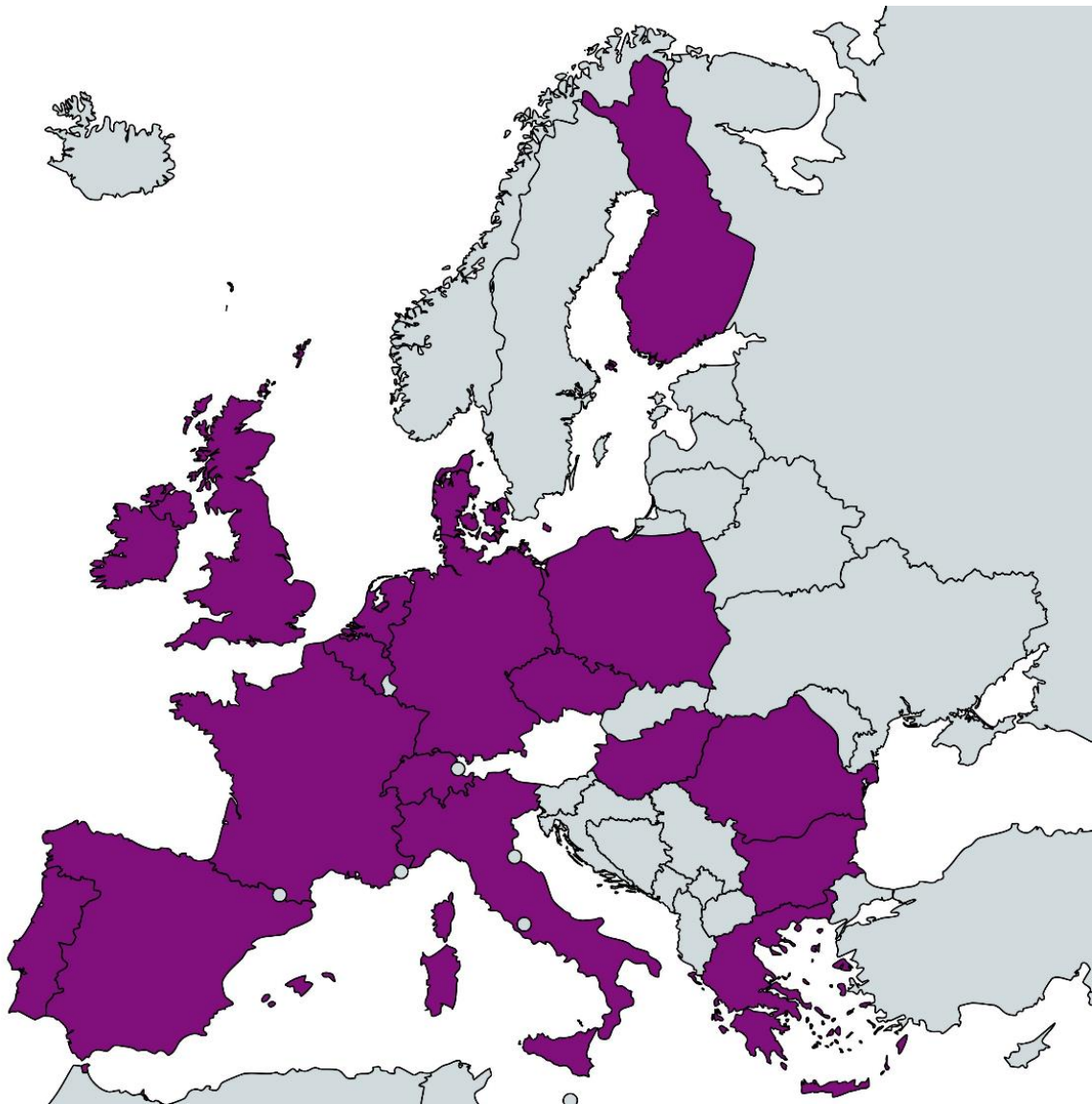


Set-up of the study

The qualitative data was collected in the Citizen Participation Forum, an online community with around 300 members from 17 countries.

81 members, interested in talking about food and generally well-informed, took part in the study.

Participants took part in activities ranging from discussions, to polls and questionnaires, photo-challenges and journal entries.



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- ¹² Gosnell, H., Gill, N. J., & Voyer, M. (2019). Transformational adaptation on the farm: Processes of change and persistence in transitions to 'climate-smart' regenerative agriculture. *Global Environmental Change*, 59, 101965.
<https://doi.org/10.1016/j.gloenvcha.2019.101965>
- ¹³ Lee, H., & Hwang, J. (2016). The driving role of consumers' perceived credence attributes in organic food purchase decisions: A comparison of two groups of consumers. *Food Quality and Preference*, 54, 141–151. <https://doi.org/10.1016/j.foodqual.2016.07.011>



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About the Consumer Observatory

Powered by EIT Food, the Consumer Observatory brings together research and consumer insights organisations from across the food system to curate and produce bespoke research, up-to-date analysis, and unique insights from across the agrifood community. It aims to maximise the impact of consumer insights on agrifood topics, delivering greater knowledge, strategy, and guidance to agrifood stakeholders, educators, policymakers, and businesses – helping to bring about change in the agrifood system that is well-informed and consumer-focused.

This central hub puts insights into consumer behaviour at the heart of the conversation on food sector trends and sustainability – driving forward innovative solutions that are well-informed and consumer-focused.

Find out more about the Consumer Observatory and get in touch today to discuss your consumer insight needs:

eitfood.eu/projects/consumerobservatory

Appendix: further reading



Regenerative agriculture shows promise on the environmental front

From a climate perspective, regenerative agriculture shows great potential^{8, 9}.

The health of the soil can be maintained or restored, even healing the damages done by conventional agricultural methods⁹. Through regenerative practices, biodiversity is encouraged, watersheds can be protected, and ecological and economic resilience improved¹⁰.

Food produced through regenerative agriculture is potentially also healthier by being more nutritious, but also by being exempt from (potentially) harmful pesticides¹⁰.



Farmers support regenerative agriculture but face barriers

Farmers, according to Deloitte, are happy to support regenerative agriculture innovations, but they are facing some challenges^{11, 12}.

They need to meet the rise of the ever-increasing food demand, while also keeping the prices low and compete with food produced through other agricultural methods¹¹.

Still, the benefits (in theory) should outweigh the limitations: yield loss will be reduced, farmers may get an additional income from carbon credits, fertiliser and crop protection costs will be reduced.

Deloitte estimates that when crop farmers implement regenerative agriculture, their yields can outperform those of conventional farming after 6-10 years.



Drawbacks of regenerative agriculture

While regenerative agriculture is often framed as the holy grail solution to the problems associated with conventional farming, there are potential drawbacks:

- Farmers will need to acquire new knowledge and skills, which will require a shift in their approach to managing their properties, farming activities and even their personal lives¹¹.
- Less tilling means that less carbon dioxide will be released into the atmosphere, but may also lead to more unwelcome plants
- Some farmers compensate by increasing their use of herbicides
- Potentially lower yields, dependent on crop and local conditions
- A transition away from conventional methods will take time⁶.

