



Exploring Consumer Appetite for Regenerative Agriculture

Regenified's 2024 Consumer Report

Published October 2024

Table of Contents

Executive Summary	1
Key Findings	2
Introduction	3
Methodology	4
Knowledge Divide	5
Growing Base of Advocates	8
Supply and Demand	9
Building Trust	10
Consumer Motivation	11
Bridging the Gap	13

Executive Summary

In order to deliver essential insights for growers, retailers and brands in the rapidly expanding regenerative marketplace, Regenified commissioned a survey to establish key benchmarks on consumer awareness, interest, and purchase intent.

The in-depth study involved 850 U.S. consumers, segmented into General Consumers and Values-Based Shoppers. **During analysis, the data revealed a key finding: a promising subset of consumers spanning both groups—referred to as the Emerging Regenerative Market—who demonstrated significant interest in regenerative values and a desire to purchase regenerative products.**

The 2024 survey results suggest that consumer awareness of regenerative agriculture is increasing, particularly among the Emerging Regenerative Market, who demonstrate a deeper understanding and stronger engagement with the concept. While this group represents a valuable and passionate market segment, nearly three-quarters of Values-Based Shoppers are seeking trusted information about what regenerative agriculture really means and how it impacts their food choices. This presents an opportunity for brands and retailers to offer clear, credible information that can position them as trusted leaders in this growing space.



The data also highlights a significant barrier to consumer adoption: limited access to regenerative products in the marketplace. This challenge reveals a clear pathway for companies to both expand product availability and improve transparency through clearer labeling and messaging. As consumers increasingly seek products that align with their values, brands and retailers that address these gaps will be well-positioned to lead in the regenerative movement. However, sustained efforts are essential to drive broader adoption and build long-term consumer trust in this rapidly evolving market.

Key Findings

1. Growing awareness, limited understanding

68% of Values-Based Shoppers have heard of regenerative agriculture, but only **37%** claim to understand it.

2. From steady rise to rapid expansion

Awareness of regenerative agriculture has grown steadily year over year between 2019 and 2024. With nearly half of respondents indicating they became familiar with the term within the last year, awareness has surged, signaling a shift into a high-growth phase.

3. Willingness to pay more for regenerative

56% of Values-Based Shoppers are willing to pay more, with **89%** of the Emerging Regenerative Market indicating a strong willingness to pay a premium.

4. Strong interest in regenerative

65% of Values-Based Shoppers are "extremely interested" after aided awareness.

5. Certification is critical

72% of Values-Based Shoppers say certification is "extremely important." For the Emerging Regenerative Market, this figure rises to **92%**, showing a strong demand for trust and clear labeling.

6. Education is key

40% of Values-Based Shoppers want in-store displays and clearer product labeling, and this need is even stronger among the Emerging Regenerative Market, with **49%** expressing the same desire.

7. Accessibility is a challenge

40% of Values-Based Shoppers cite availability as a barrier to purchasing regenerative products. **89%** of the Emerging Regenerative Market are willing to go out of their way to find regenerative products, but access remains a hurdle.

8. Health and nutrient density drives purchases

"Increased nutrient density" is a key benefit for **80%** of Values-Based Shoppers, and this importance climbs to **96%** among the Emerging Regenerative Market.

9. Untapped Potential for Retailers

No clear leader has emerged in the regenerative agriculture space, creating an opportunity for retailers to position themselves in this emerging market.

10. A Growing Base of Regenerative Advocates

Data revealed a distinct subset, representing **32%** of Values-Based Shoppers and **20%** of General Consumers, who expressed heightened interest and engagement with regenerative agriculture.

Introduction

Agriculture plays a critical role in the global economy, contributing approximately 4% of global GDP, and in some low-income regions, exceeding 25%.

Over time as populations have grown, so has the demand for food, leading industrial farming to step in and meet the need. But that has come at a significant environmental cost—damaging ecosystems, depleting soil health, stripping nutrients from food, and reducing biodiversity.

Now, more than ever, there's a growing need for solutions that actively restore and improve the environment. Regenerative agriculture offers the solution, and its importance continues to grow as it shifts the way we think about farming. By focusing on restoring soil health, improving water cycles, and enhancing biodiversity, regenerative agriculture is about working with nature instead of against it, offering a path forward that is about healing the land while nourishing both people and the planet.

Regenerative agriculture is key to tackling the global challenges we face, but farmers can't do it alone. Partnership and collaboration across the entire supply chain is needed to drive real change. To support this, understanding consumer perceptions is essential. This survey set out to gather benchmarks, providing a starting point to track growth, measure market impacts, and understand the drivers and barriers to support and purchase that will influence the supply chain's transition to regenerative practices.

Methodology

Through a two-part study that engaged 850 consumers across sample panels in the United States, two main segments were identified: the **General Consumer** and the **Values-Based Shopper**.

In part one of the study, 250 consumers reflected the general population to develop a baseline of awareness and interest.

In part two, qualifiers were added to remove those who prioritized only low price, taste, and brand in their purchase factors. The resulting 600 Values-Based Shoppers arose with a preference for purchasing high quality food, shopping at a high quality food retailer at least once every six months, and having selected a quality-related food claim as one of their top three most important factors driving purchase. In other words, they care about the quality and nutritional value of what they eat, and they prove it at checkout.

In both parts of the study, consumers were first asked questions to gauge their unaided awareness of regenerative agriculture. They were then provided with a clear definition and visual aid explaining the concept, followed by additional questions to measure their level of interest once a shared understanding of the term was established.

This report takes a close look at both everyday consumers and those who have more complex values driving purchase decisions, providing key insights into current awareness of regenerative agriculture, what drives consumer choices, and the behaviors influencing market trends. These insights are essential to understanding how to increase the adoption of regenerative practices, open up market access for regenerative products, and encourage collaboration across the entire supply chain.

At a glance

850 U.S. consumers segmented into two groups

1. General Consumers
2. Values-Based Shoppers

Two-Part Study

Part 1: General Awareness Baseline

250 consumers representative of the general population

Part 2: Focused on Quality-Driven Shoppers

600 consumers with values-based shopping behaviors

Controlled for age, income, region, and location type

Values-Based Shoppers are statistically compared to General Consumers at a 95% confidence level.

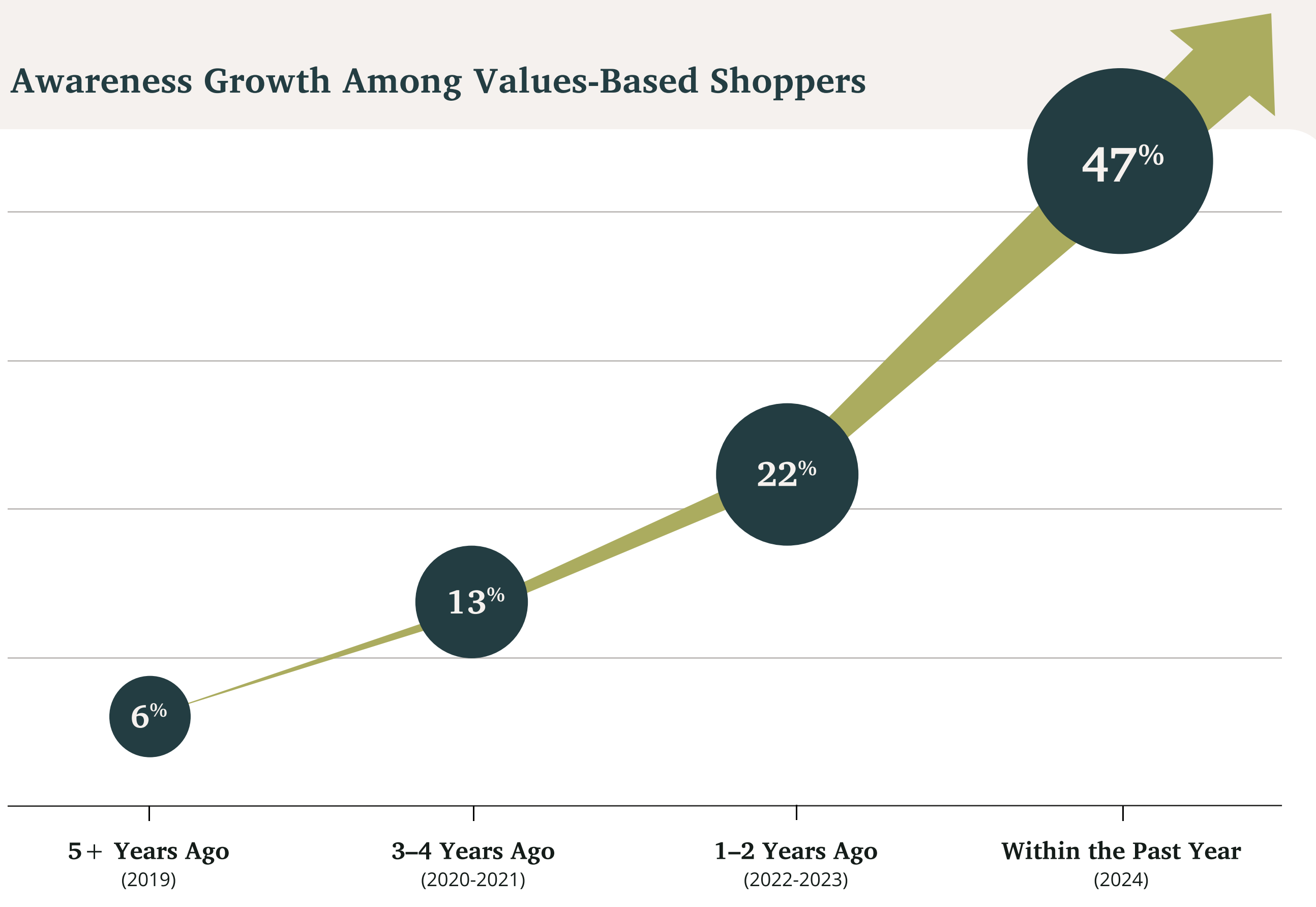
Knowledge Divide

Key Highlights

- While many consumers may recognize the term "regenerative agriculture," most still hold a surface-level understanding that is shaped by broader agricultural themes.
- Critical benefits like soil regeneration, biodiversity enhancement, and ecosystem restoration need to be clarified to resonate more clearly with consumers.

As discussions around regenerative agriculture grow, consumers are becoming more aware of its benefits. In the past year, awareness of the term has doubled, with over 69% of Values-Based Shoppers saying they've heard about regenerative agriculture in the last two years. Regenerative agriculture is shifting into a high-growth phase, but while the term is gaining traction, the level of understanding differs among the three key consumer groups.

Awareness Growth Among Values-Based Shoppers



The data highlights clear differences in how each group perceives and interacts with regenerative agriculture. Prior to exposure to visual aids, 47% of the Emerging Regenerative Market have a solid understanding of the concept, and 37% of Values-Based Shoppers reported understanding what regenerative agriculture means. Among General Consumers, this figure is 26%. These statistics reveal that, although there is growing awareness, there is room to assist consumers with understanding.

The Opportunity

This knowledge gap between segments presents an opportunity for brands and retailers to align their messaging with the values consumers truly care about. Rather than making generic regenerative claims, companies can attract customers and build loyalty by sharing specific details about how their practices address key consumer concerns.

Values-Based Shoppers are motivated to support initiatives that protect water systems (81%), improve human health (80%), and increase nutrient density in food (80%).

They also prioritize long-term soil health (79%), reducing chemical use in farming (78%), and supporting a healthier environment (79%).

By emphasizing specific benefits such as cleaner water, enhanced farm resilience, and the production of healthier, nutrient-dense food, brands can engage Values-Based Shoppers more deeply, creating stronger loyalty around the regenerative practices that align with these values.



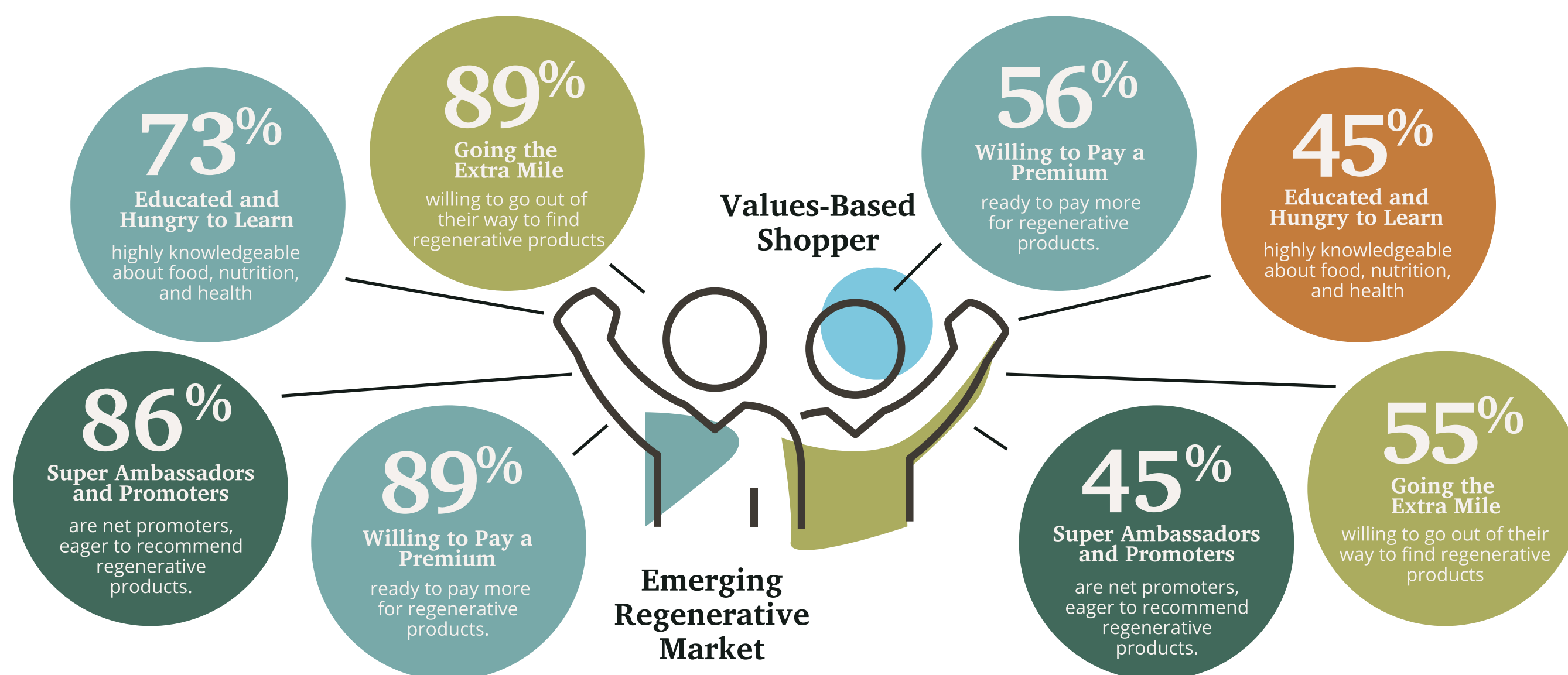
Growing Base of Advocates

Key Highlights

- A distinct group, the Emerging Regenerative Market, seeks transparency and aligns their purchases with deeply held ethical, environmental, and health values.
- These vocal advocates are not just purchasers; they actively promote regenerative products, driving broader consumer adoption and influencing market trends.

The Emerging Regenerative Market was identified as a distinct subset of Values-Based Shoppers based on their heightened interest and engagement with regenerative agriculture.

Defining the Emerging Regenerative Market



The Emerging Regenerative Market is more likely to seek products with three or more value-based claims, such as Organic, All Natural, Locally Sourced, and Non-GMO as well as Clean Label, Ethical Animal Treatment, and Sustainably Made. Their purchasing decisions are influenced by a combination of these attributes, reflecting their commitment to aligning their choices with broader ethical and health values.

These individuals are defined not only by their heightened awareness of food, health, and environmental issues, but also by their deep-rooted commitment to aligning purchasing decisions with ethical and environmental values.

What sets the Emerging Regenerative Market apart is their influence as advocates for the regenerative movement. These consumers are not just purchasers; they are vocal supporters of the products and brands they believe in, playing a key role in driving wider consumer adoption. Through their recommendations, the Emerging Regenerative Market helps raise awareness of regenerative agriculture, serving as ambassadors for a more resilient food system.

As regenerative agriculture gains traction, this group represents a critical opportunity for growth. By targeting and empowering the Emerging Regenerative Market as loyal advocates, brands can create a ripple effect, influencing broader consumer segments. As leaders and early adopters, these shoppers will continue to offer support and drive the wider adoption of regenerative agriculture through their commitment and engagement.

The Emerging Regenerative Market is made up of...

Loyal Advocates

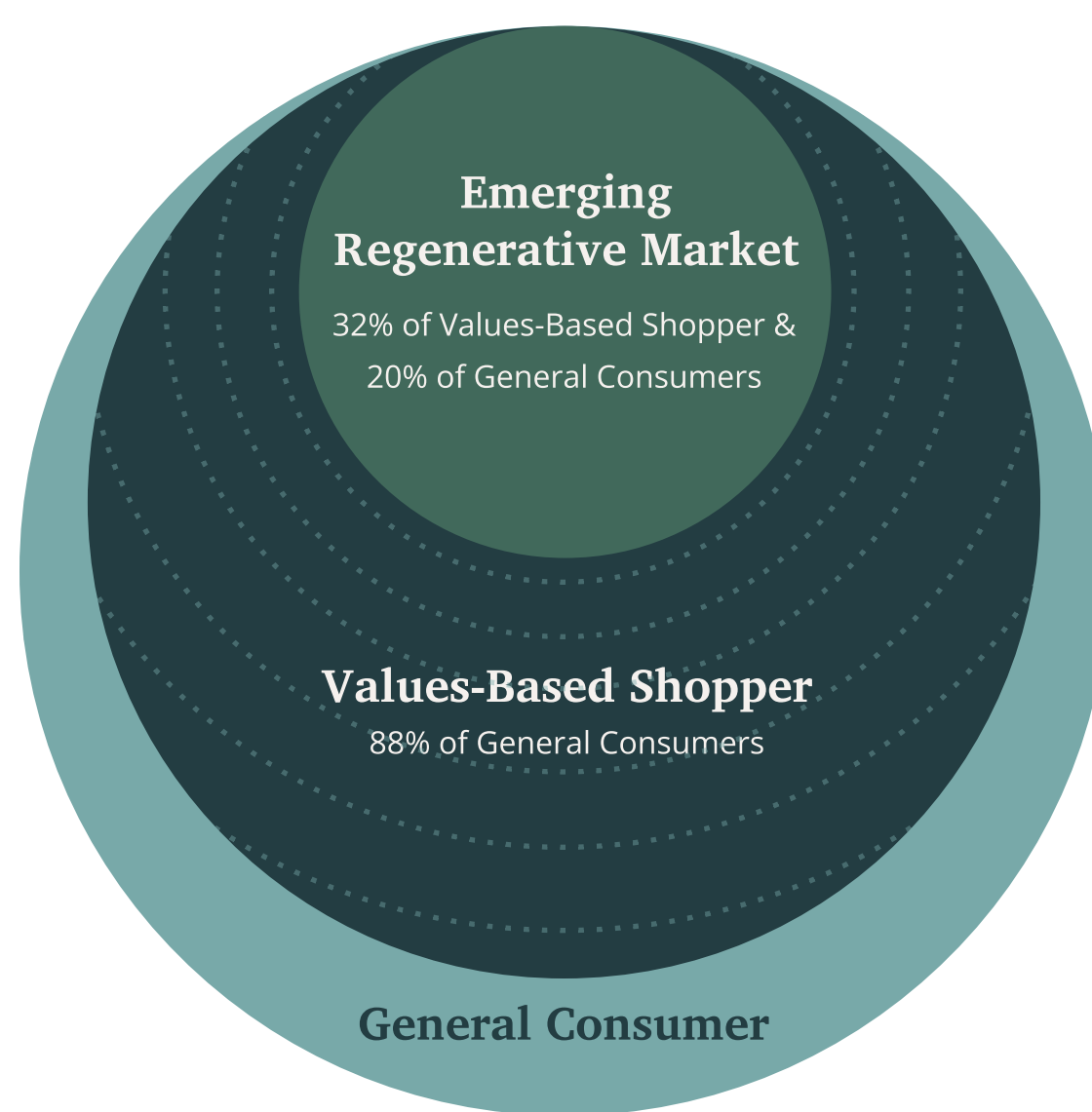
86% Likely to Recommend

Premium Buyers

89% Willing to Pay a Premium

Committed Shoppers

89% Go Out of Their Way for Regenerative Products



The Emerging Regenerative Market are not passive consumers; they actively seek out products that align with their values and are willing to go the extra mile to purchase them. Their commitment to regenerative agriculture extends beyond personal consumption—they are vocal advocates who promote the benefits of regenerative products to others and can create a ripple effect throughout the broader consumer market.

The Opportunity

The Emerging Regenerative Market offers brands and retailers a unique opportunity to build loyalty and expand their market reach. These consumers are ready to support regenerative products and they are eager to champion them. Brands that align with the values of the Emerging Regenerative Market will attract loyal customers who are willing to pay a premium for products that reflect their priorities. In short, the Emerging Regenerative Market is ready to lead the way, and brands that support regenerative agriculture authentically will find in them loyal advocates and powerful promoters.

Supply and Demand

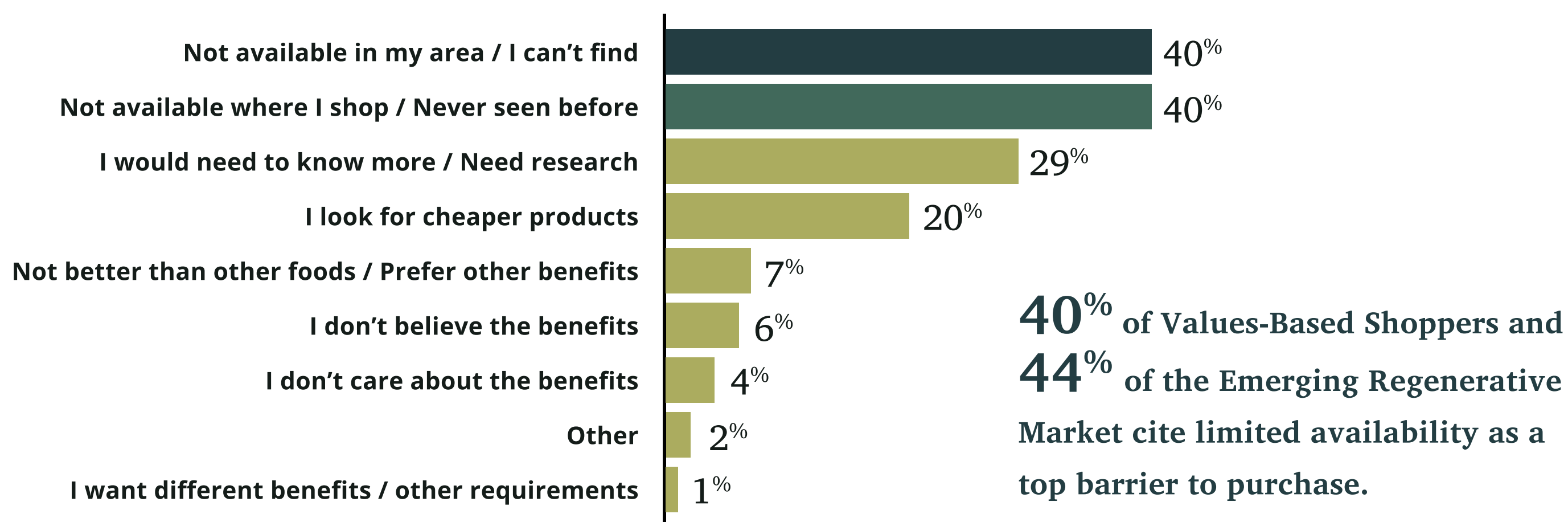
Key Highlights

- 74% of Values-Based Shoppers are likely to purchase regenerative products, but limited availability is a barrier.
- 89% of the Emerging Regenerative Market are ready to pay a premium, signaling strong consumer willingness to support regenerative agriculture.
- Accessibility is the main hurdle, with consumers often unable to find regenerative products in their area or where they shop.

As consumer interest in regenerative products continues to grow, a key challenge has emerged: availability.

The two biggest obstacles are clear: consumers often report that regenerative products are either not available in their area, or not found in the stores where they shop. Accessibility hinders broader consumer adoption.

Top Barriers to Purchase for Values-Based Shoppers



Values-Based Shoppers are especially interested in supporting regenerative agriculture across core product categories such as fruits and vegetables (83%), eggs (60%), dairy (56%), meat (52%) and grains (48%). However, availability for these products remains unmet in many regions, representing a significant missed opportunity for brands and retailers.

The Opportunity

Expanding product availability and ensuring that regenerative options are visible and easily found in stores, companies can meet the needs of a highly motivated consumer base. In doing so, they have the potential to capture the loyalty of the Emerging Regenerative Market and Values-Based Shoppers, both of whom are eager to support brands that reflect their values and commitment to a healthier, more resilient food system.

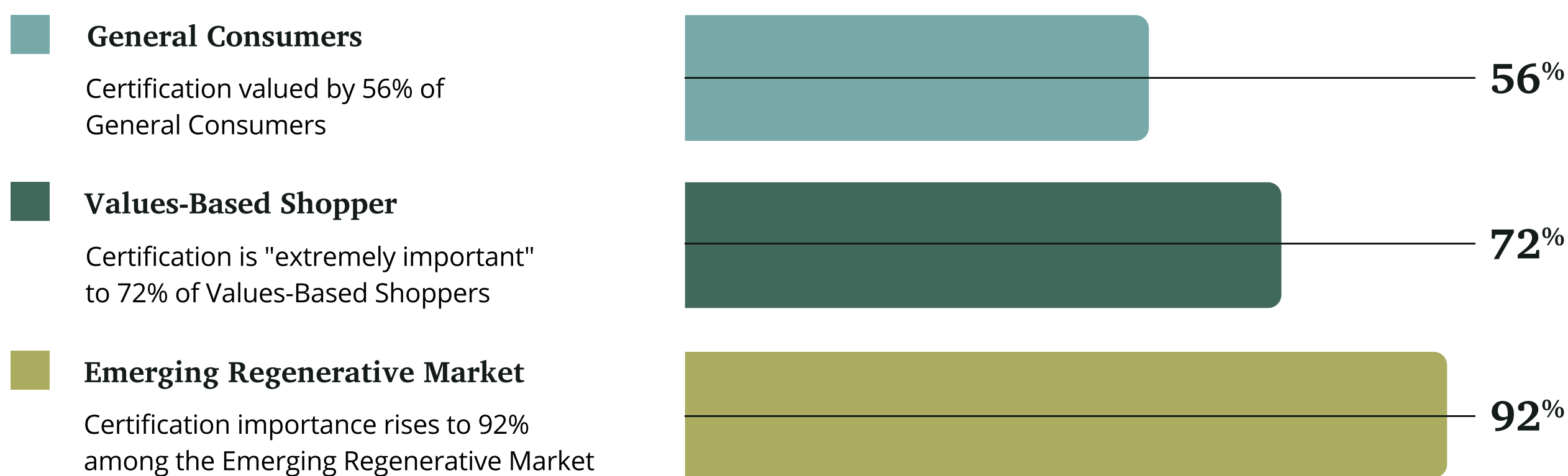
Building Trust

Key Highlights

- Certification addresses consumer demand for clear and reliable information.
- More engaged consumers, especially the Emerging Regenerative Market, place a higher value on certification, giving brands a pathway to foster loyalty by being transparent about their practices.

Trust is a critical factor in consumer decision-making, particularly when it comes to regenerative products. The data shows that certification not only builds trust but also creates a clear, transparent pathway for consumers to discover and engage. The more deeply consumers are driven by values-based shopping behaviors, the more critical certification becomes in gaining their confidence.

Percentage of Market Demographics that Value Certification



In a competitive market, consumers are increasingly seeking transparency. Offering clear information about the origins, practices, and benefits of regenerative products is a proven way to build trust and establish long-term consumer loyalty. Certification serves as a valuable tool for brands to meet these expectations, ensuring consumers feel confident in the products they support.

The Opportunity

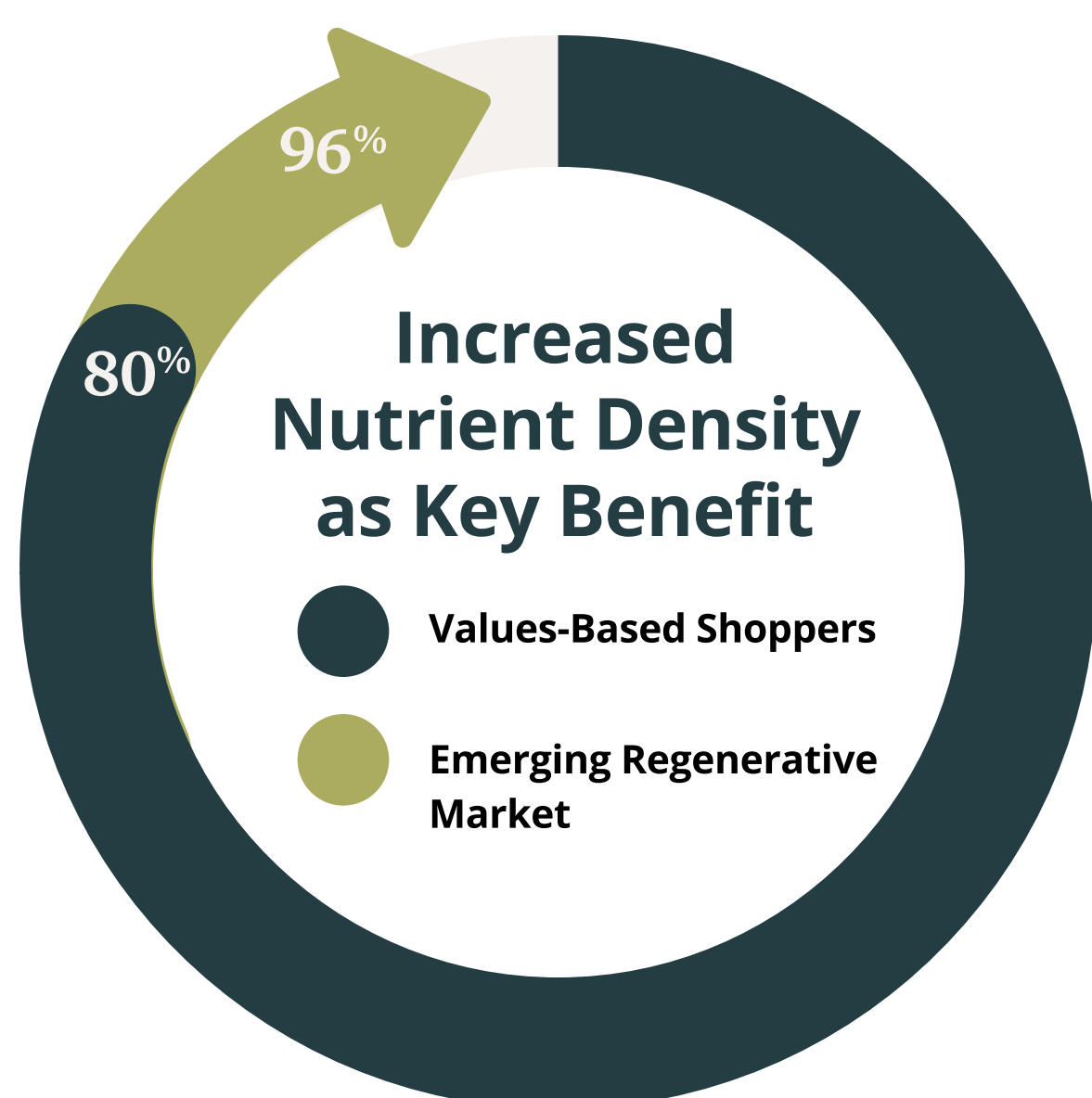
Certification presents a critical opportunity for brands to build deeper trust and loyalty with their customers. By offering products that are clearly certified and aligned with regenerative practices, companies can connect with the highly engaged Emerging Regenerative Market segment, as well as a broader consumer base. Certification helps brands stand out by providing the authenticity and assurance consumers increasingly seek when making purchasing decisions.

Consumer Motivation

Key Highlights

- 80% of Values-Based Shoppers, and 96% of the Emerging Regenerative Market, view increased nutrient density as a major benefit, reinforcing the health-centric appeal of regenerative products.
- The data suggests that consumers associate improved soil health with greater nutrient density, making regenerative agriculture both an environmental and health-driven option that satisfies their values.

Consumers align their purchases with their health and nutritional priorities. For Values-Based Shoppers, "increased nutrient density" stands out as a key benefit, with 80% identifying it as a significant factor in purchasing decisions. Among the Emerging Regenerative Market, this figure climbs even higher to 96%.



Top three benefits for Values-Based Shoppers:

- 1 Improve Soil Health
- 2 Increase Essential Nutrients in Food Through Natural Soil Processes
- 3 Increase Nutrient Density in Food

For these consumers, regenerative agriculture is an environmental choice that aligns with their desire for nutrient-rich food, the potential to deliver healthier, nutrient-dense food could be a critical advantage, with regenerative practices offering a unique value proposition by improving soil health, boosting the nutrient content of food, and supporting long-term human well-being.

The Opportunity

The emphasis on health and nutrient density presents an opportunity for brands and retailers to engage with consumers who prioritize both personal well-being and environmental values. However, it is crucial that these claims are substantiated. Consumers seek credible, evidence-based links between regenerative agricultural practices and the tangible outcomes they deliver—particularly in terms of nutrient-dense, healthier food.

To build trust, clear, data-driven communication can be used to demonstrate how regenerative practices directly contribute to improved soil health and enhances the nutritional quality of the food produced. Brands that can provide verifiable, transparent claims, rooted in measurable improvements in soil fertility and nutrient content, are likely to gain the loyalty of Values-Based Shoppers and the Emerging Regenerative Market.



Bridging the Gap

Exploring consumer awareness, interest, and purchase intent surrounding regenerative agriculture reveals key insights for brands, retailers, and the broader supply chain.

While many of the data points in this study align with similar studies on consumer values—such as the growing demand for high-quality products—it reveals a unique perspective on the clear link between heightened consumer interest and alignment with deeply held personal values.

The data shows that while awareness of regenerative agriculture is increasing, a smaller percentage of consumers fully understand the concept on their own. Moreover, this understanding rises sharply when information is shared to explain the benefits of regenerative practices. Better understanding the concerns, drivers, and perceptions of these key consumers—in particular the Emerging Regenerative Market—reveals a passionate subset of advocates ripe for nurture and growth. As awareness continues to grow, it is essential for brands and retailers to bridge the knowledge gap by offering clear, trusted information that aligns their products with the values consumers care about most—protecting water systems, improving soil health, and supporting healthier, more resilient food systems.

