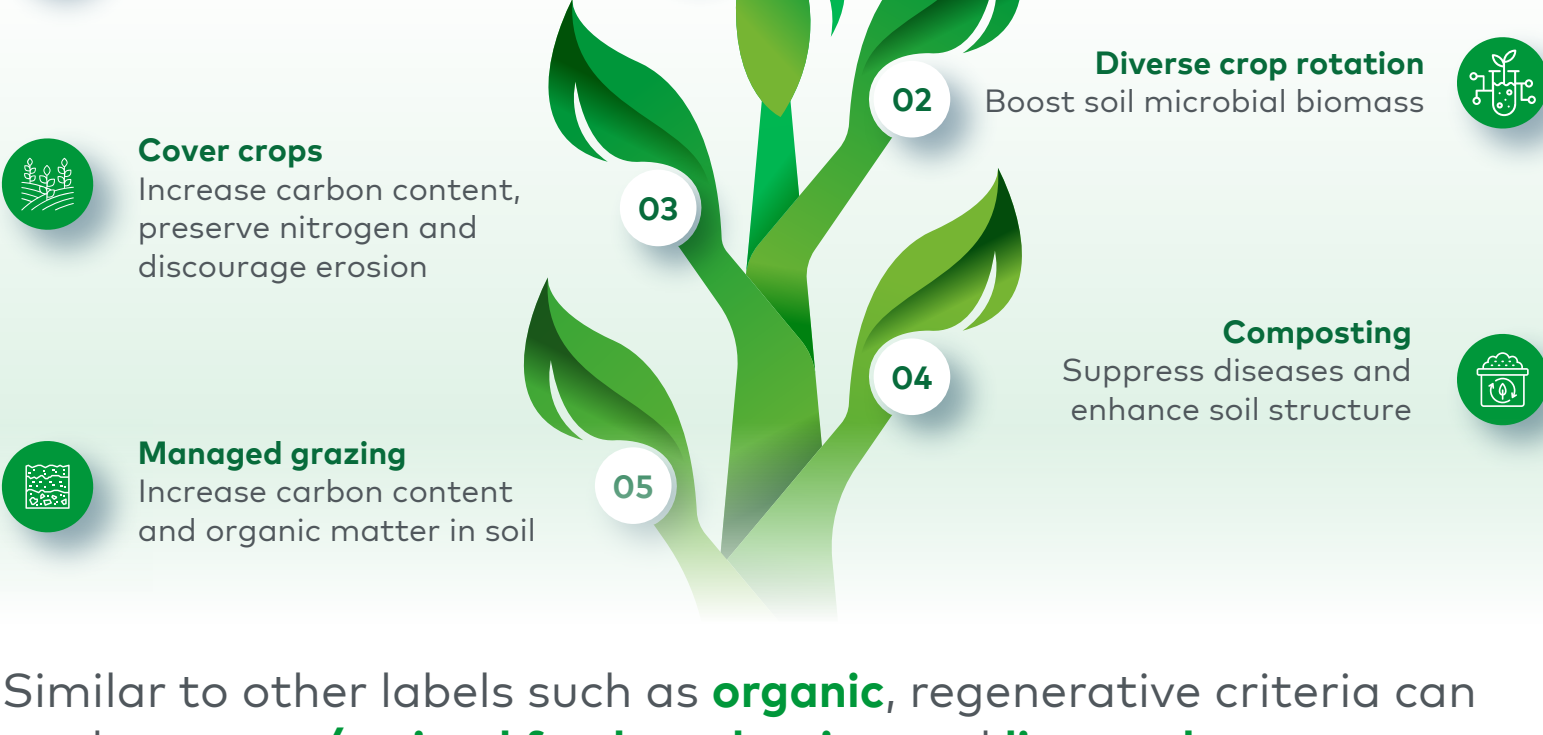


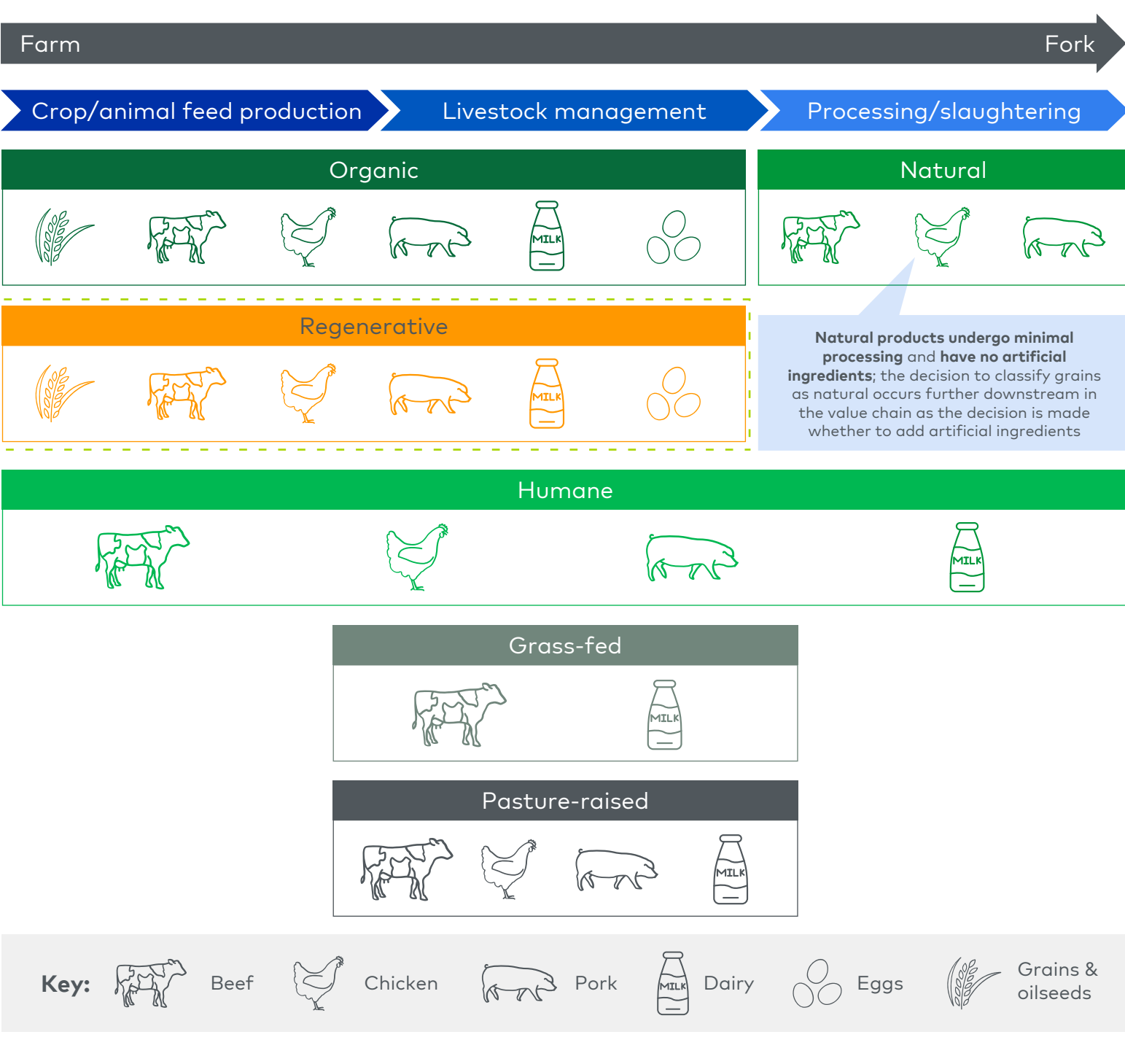
Unlocking growth in regenerative agriculture

How can regenerative agriculture scale in the United States? What are the catalysts for change? Here's where regenerative practices stand today and what it will take for value chain participants to increase their investment in this nascent approach to farming.

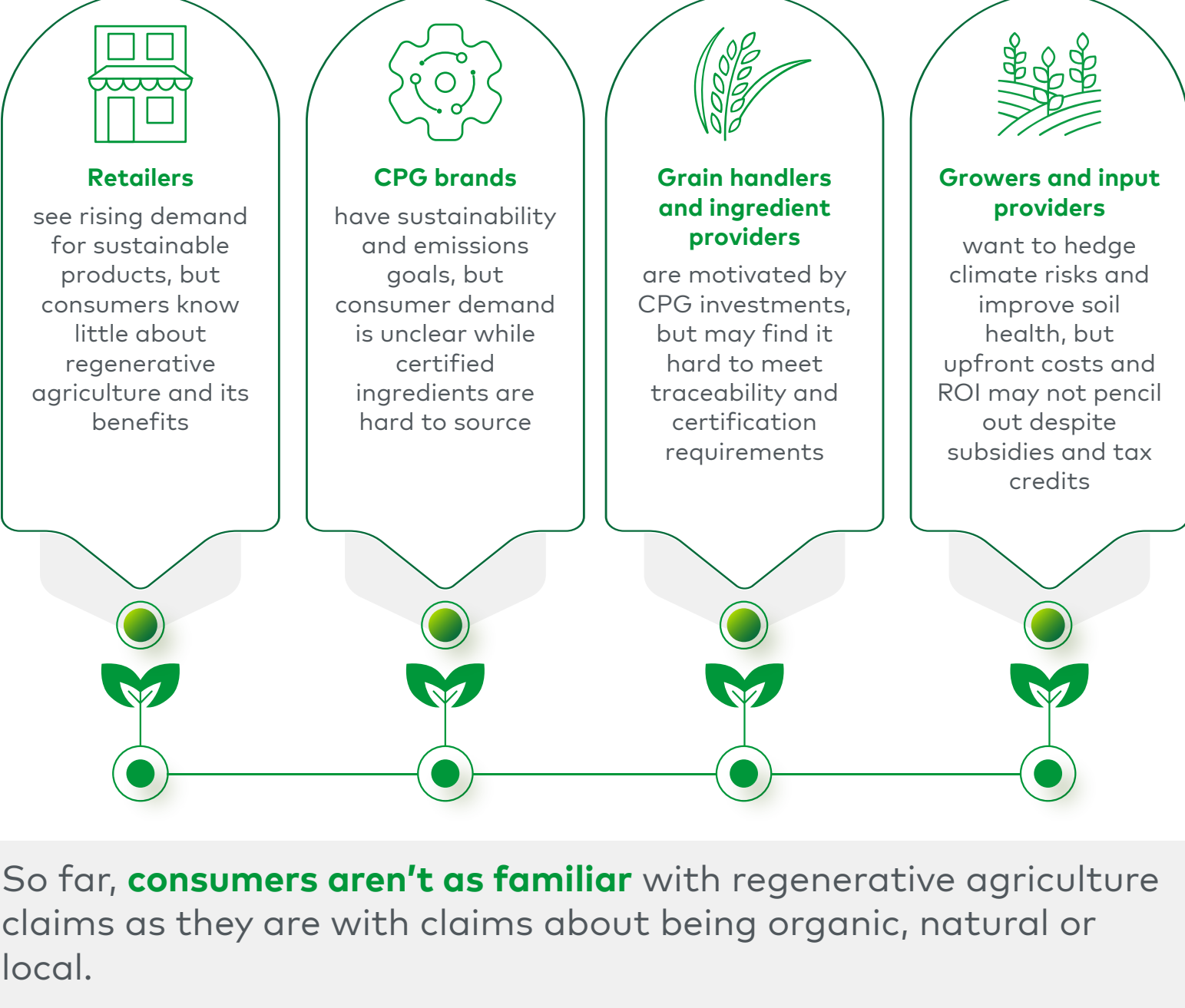
Regenerative **agriculture practices** build soil health and must be tracked across the food value chain.



Similar to other labels such as **organic**, regenerative criteria can apply to **crop / animal feed production** and **livestock management** across multiple categories.

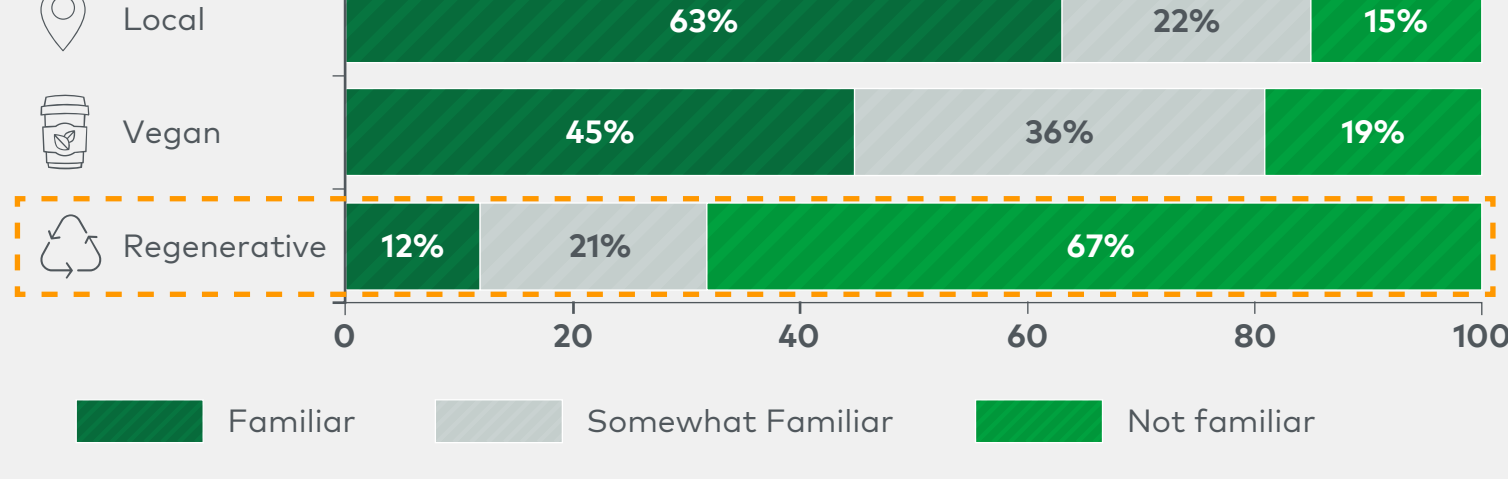


Stakeholders are attracted to **regenerative agriculture**, but face hurdles that have slowed adoption.



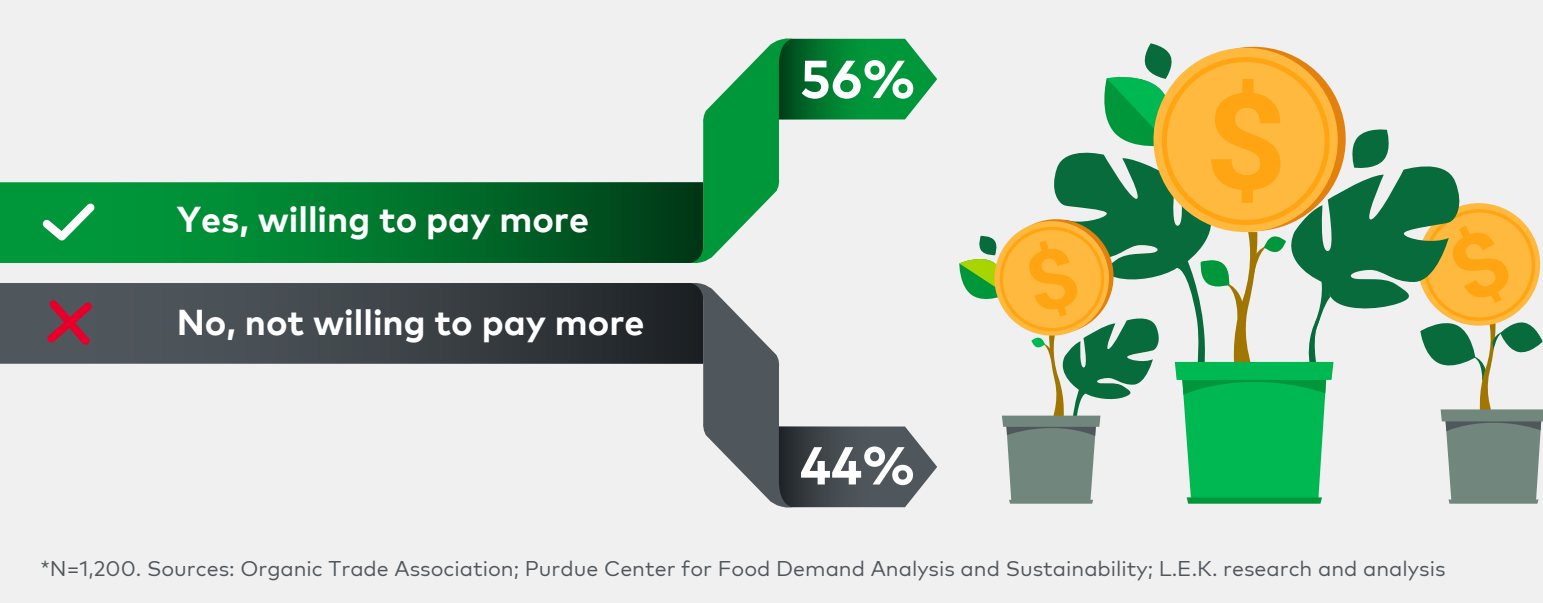
So far, **consumers aren't as familiar** with regenerative agriculture claims as they are with claims about being organic, natural or local.

Consumer awareness of claims in food or beverage purchase decision, 2023*



Those who do know about regenerative agriculture, however, say they'd **pay more** for such products.

Consumer willingness to pay more for regenerative agriculture-labeled products, 2024*

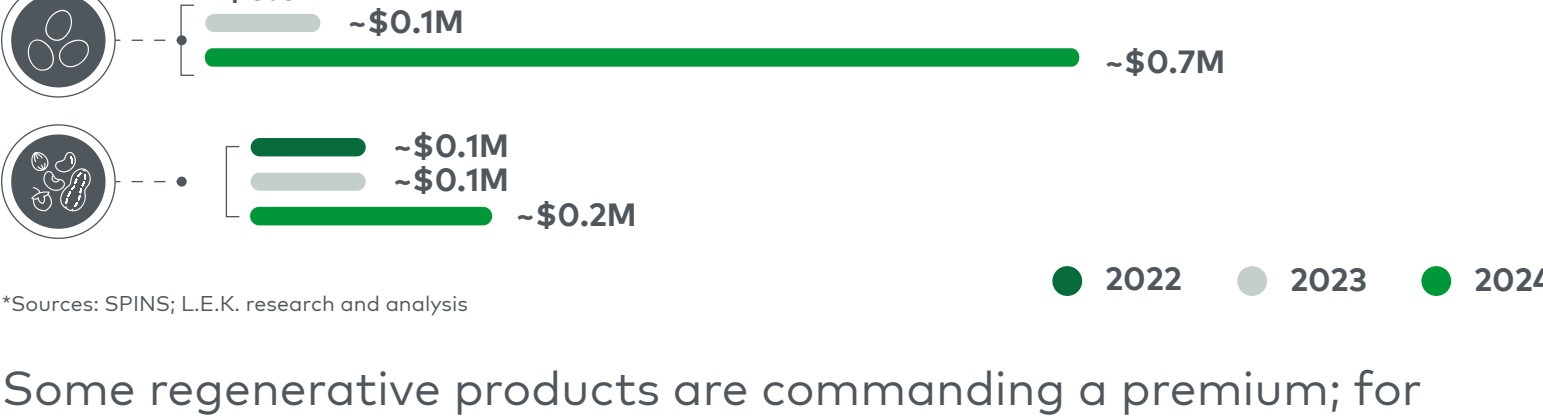


*N=1,200. Sources: Organic Trade Association; Purdue Center for Food Demand Analysis and Sustainability; L.E.K. research and analysis

And while sales of certified regenerative **organic products** are still small, they are growing in categories like eggs and nuts.

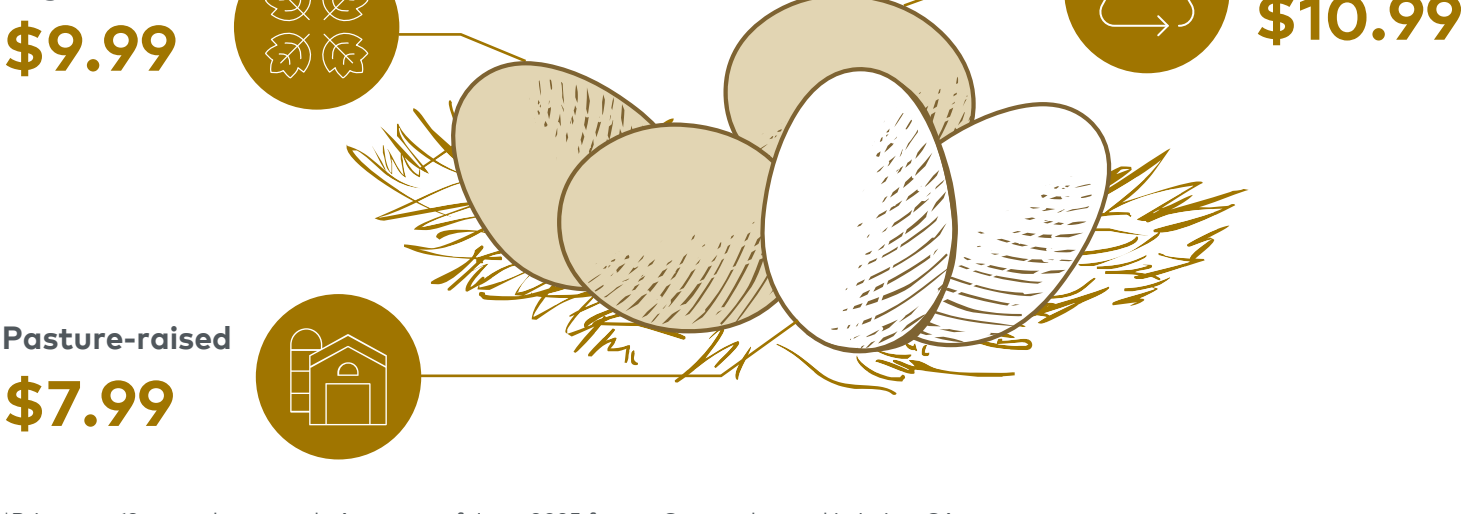
U.S. sales of certified regenerative organic eggs and nuts (2022-October 2024)*

Millions of USD (\$RSP)



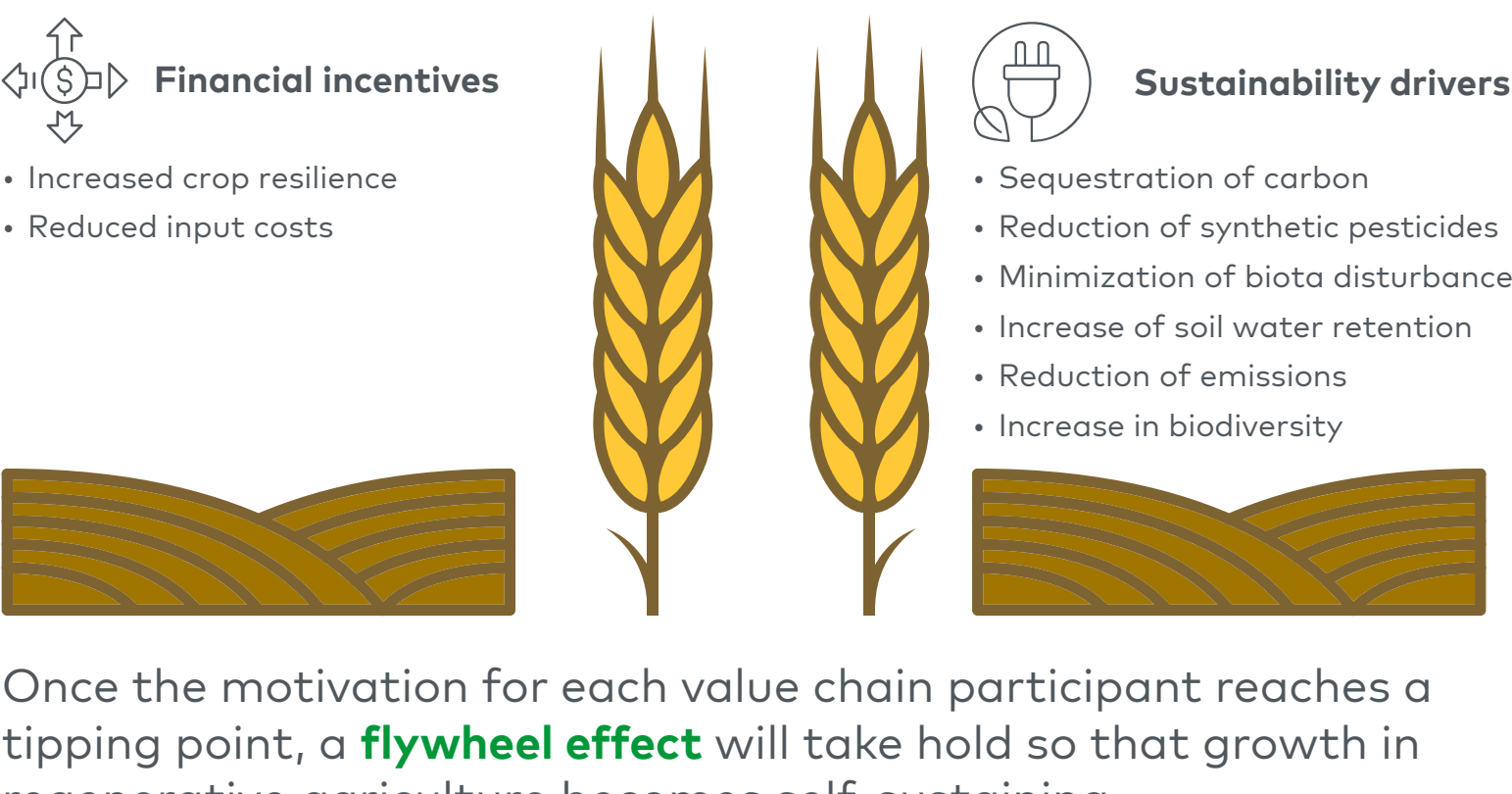
*Sources: SPINS; L.E.K. research and analysis

Some regenerative products are commanding a premium; for example at Vital Farms, regenerative eggs command a **10% premium** over organic ones.



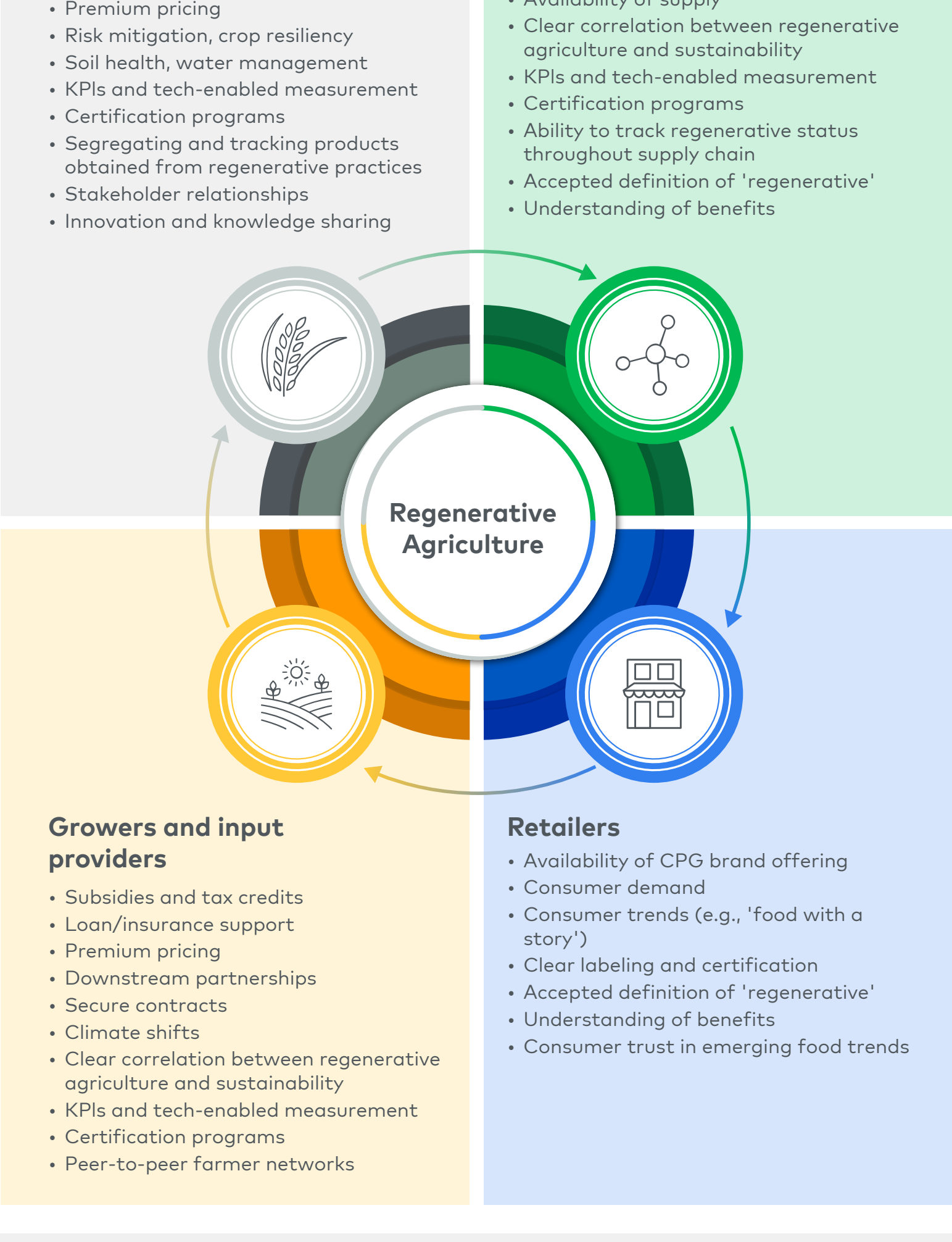
*Prices per 12-count large grade A eggs as of June, 2025 from a Sprouts located in Irvine, CA. Sources: Vital Farms website; Sprouts website; L.E.K. research and analysis

Retailers aren't the only stakeholders who stand to benefit from regenerative agriculture. Upstream agribusiness companies also have **reasons to adopt** regenerative practices.



Once the motivation for each value chain participant reaches a tipping point, a **flywheel effect** will take hold so that growth in regenerative agriculture becomes self-sustaining.

Key unlocks for adoption of regenerative agriculture



Looking to advance regenerative agriculture?

Contact us