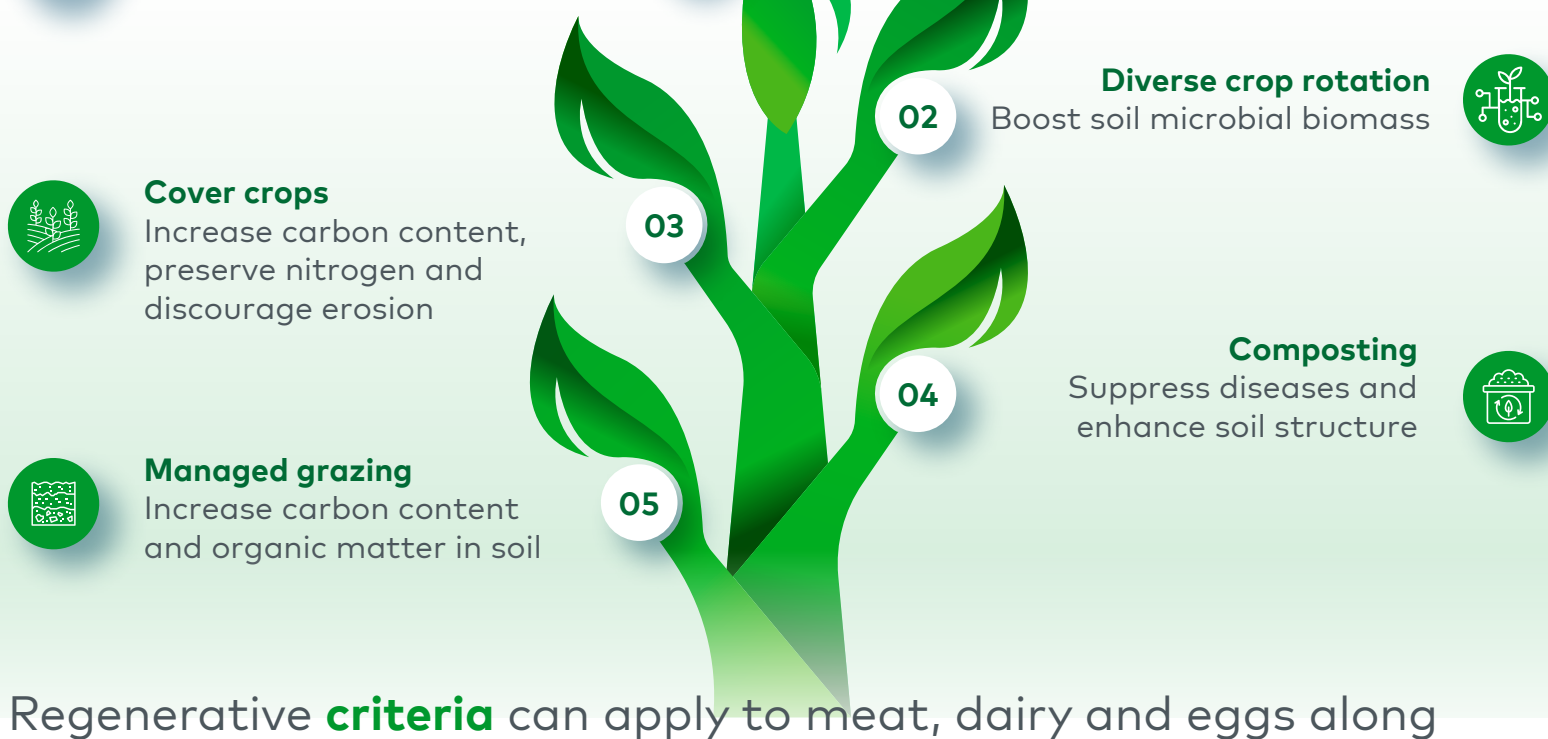


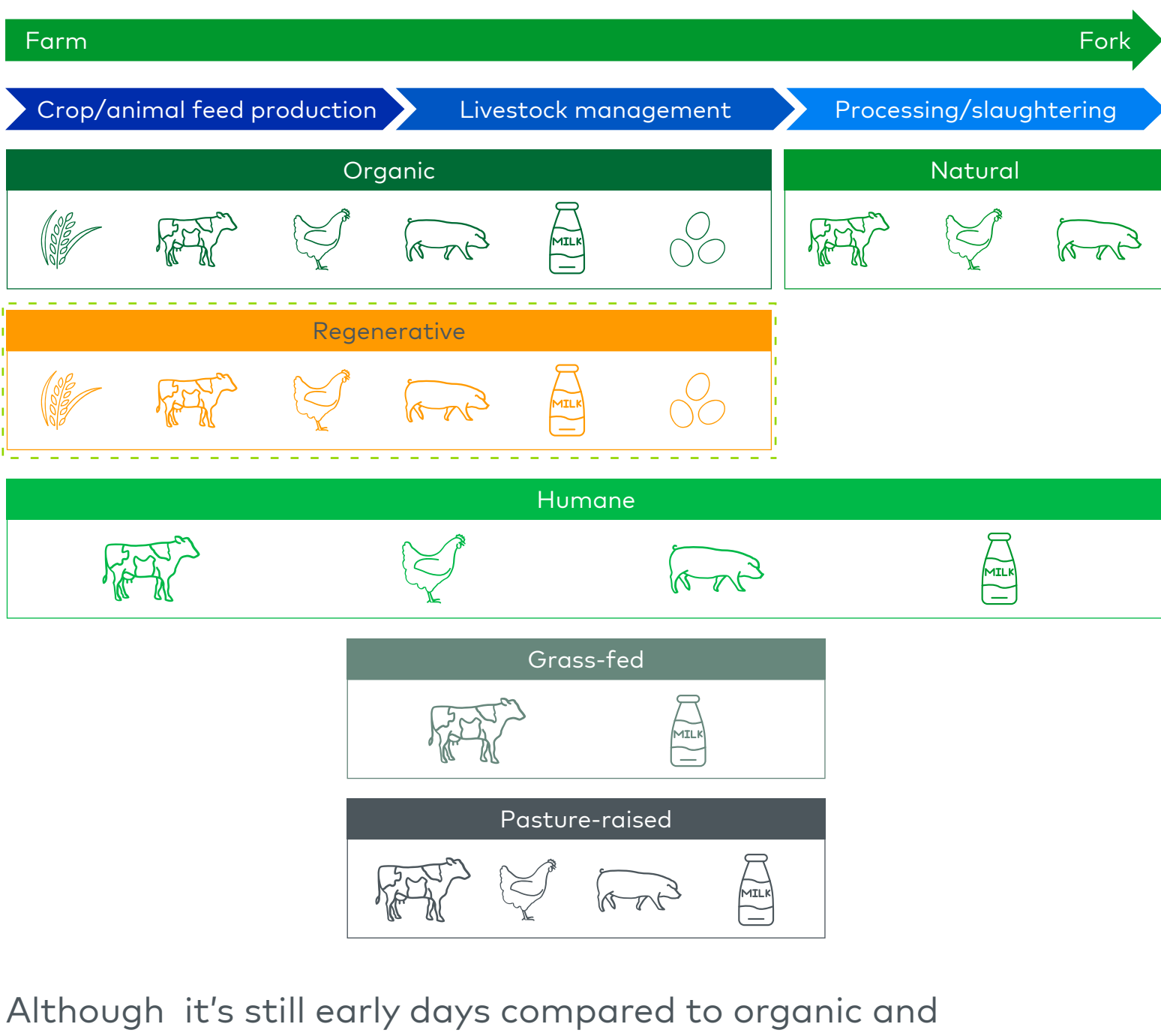
# Unlocking growth in regenerative agriculture

Regenerative agriculture has been slow to take off in the United States. Is an upsurge just around the corner? 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.

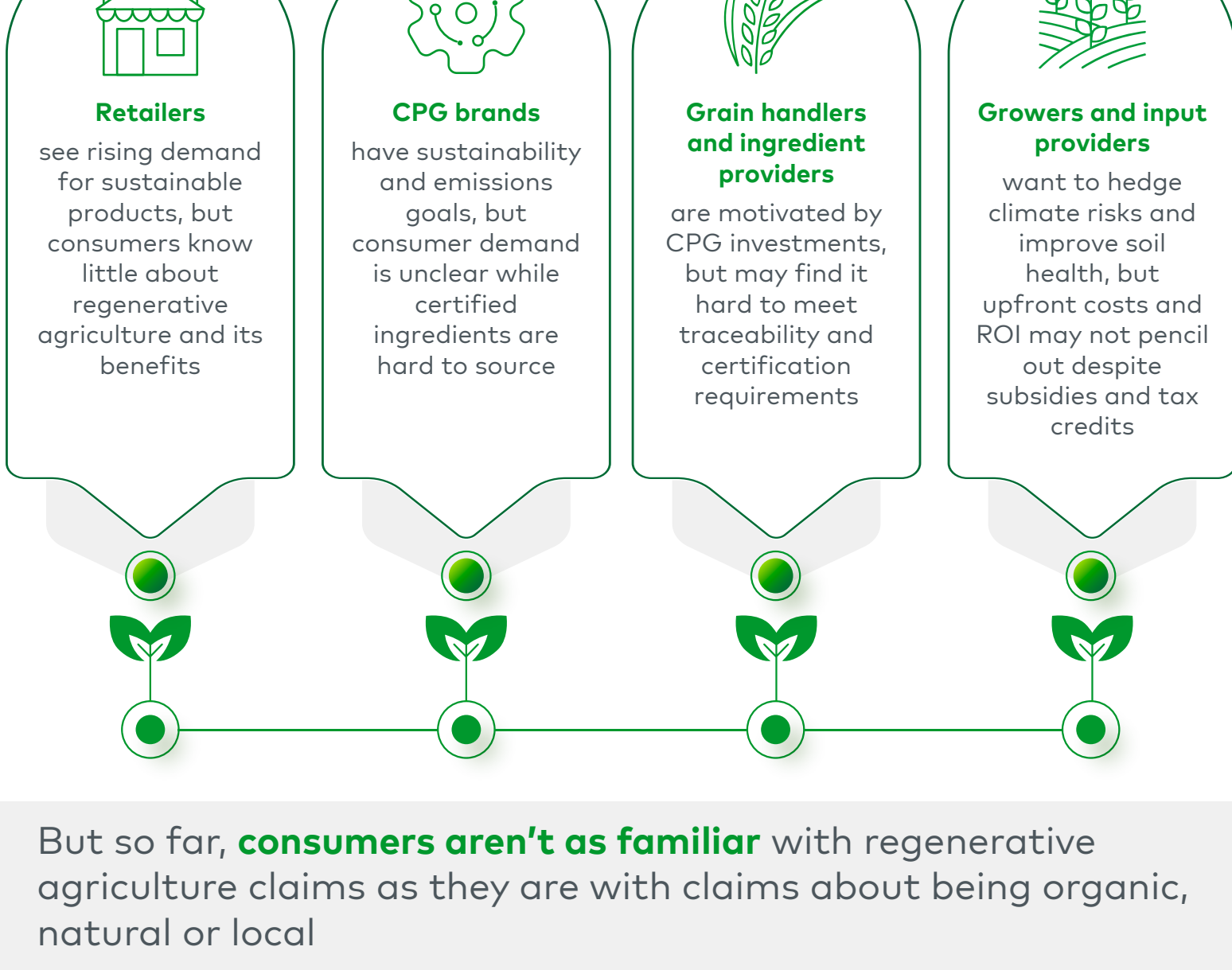
Regenerative **agriculture practices** build soil health and must be tracked across the food value chain.



Regenerative **criteria** can apply to meat, dairy and eggs along with grains and oilseeds.

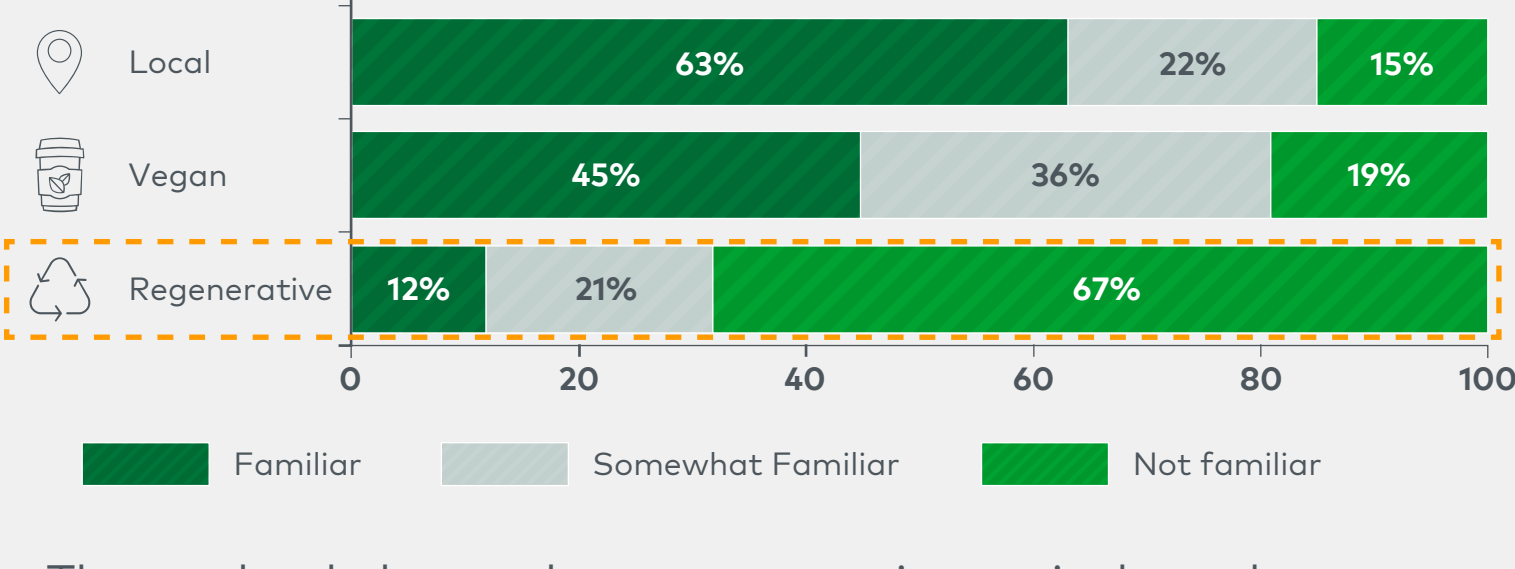


Although it's still early days compared to organic and conventional farming, more **stakeholders are committing** to regenerative agriculture.



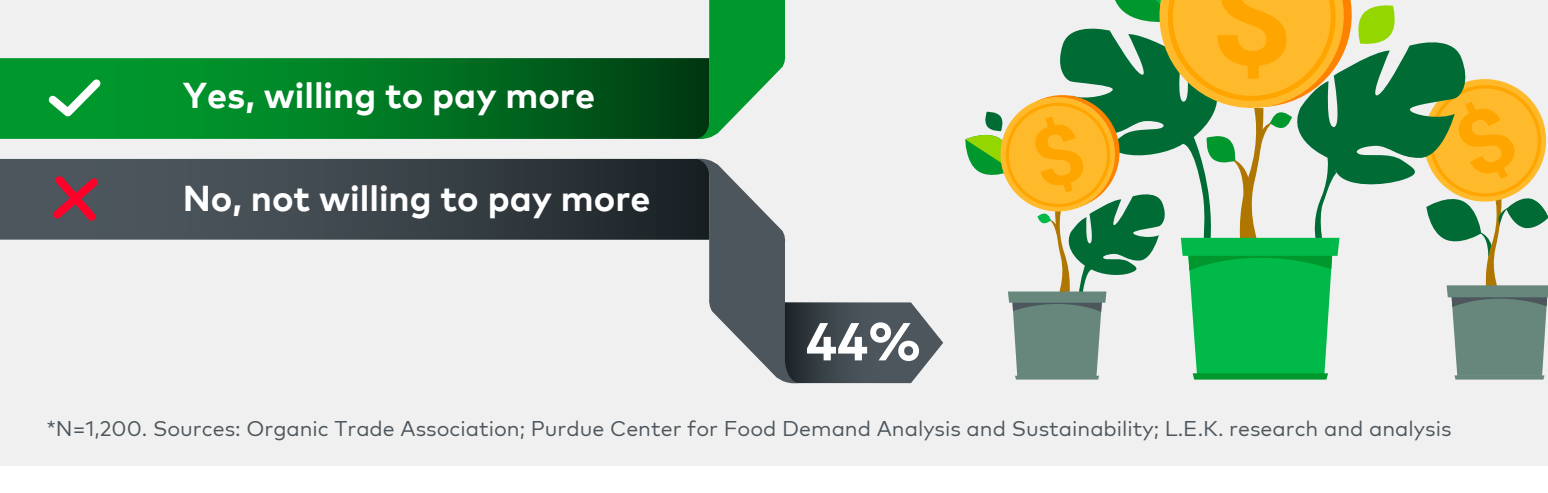
But so far, **consumers aren't as familiar** with regenerative agriculture claims as they are with claims about being organic, natural or local

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 sales of certified regenerative organic products are **growing** in categories like milk, eggs and nuts.

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

Millions of USD (\$RSP)



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

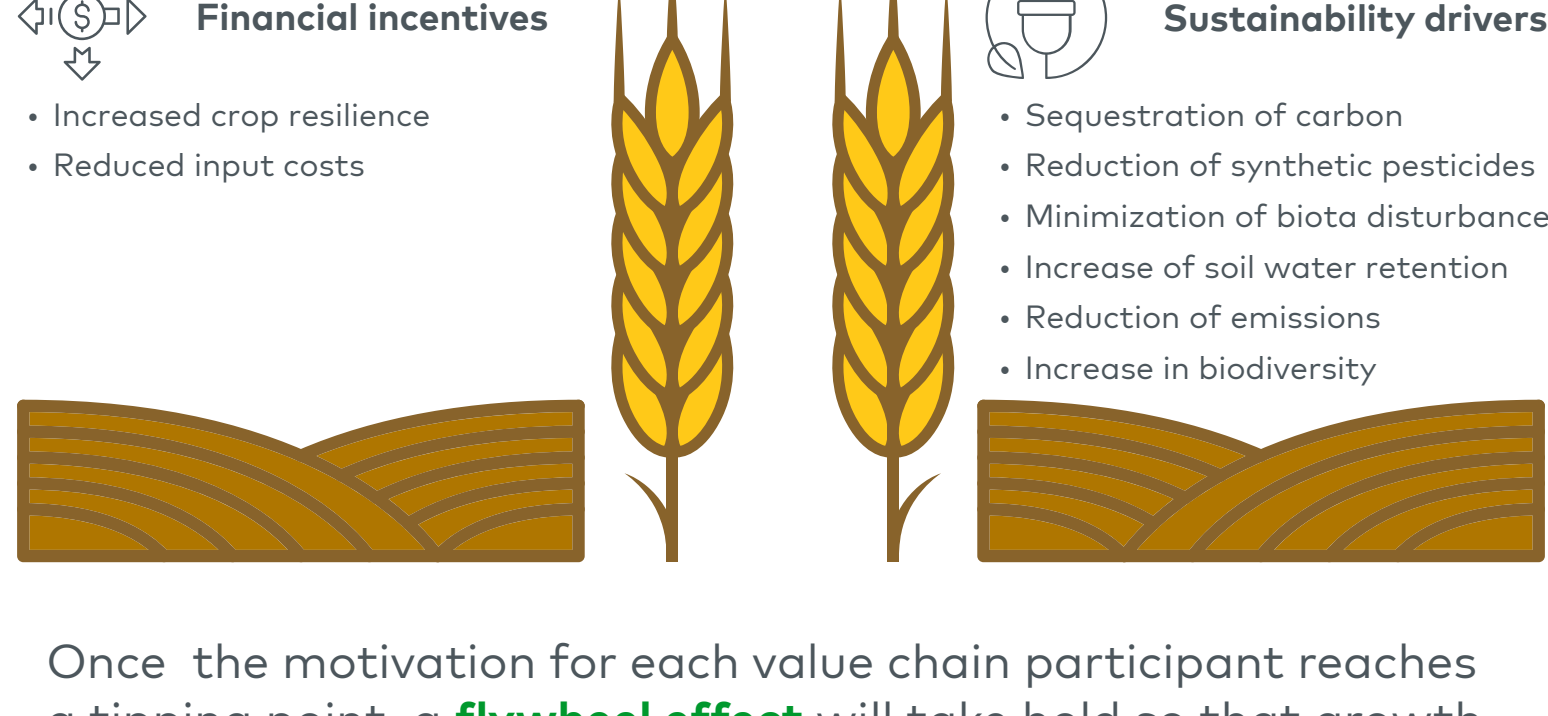
At Vital Farms, regenerative eggs command a **10% premium** over organic ones.\*



\*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.



Looking to advance regenerative agriculture?

**Contact us**