Food Consumer Observatory

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Narratives for Resilient Agriculture

State of knowledge and insights digest

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Key insights

What we know about consumer awareness and perception of regenerative and resilient agriculture

- Awareness of RA is still low despite increasing attention from media, producers, corporates, and politicians.
  - Consumers respond more strongly to outcomes (Healthier and tastier products, specifically minimising chemicals) than to farming methods.
- Consumers see RA as most relevant for fresh produce and animal products, and less relevant for processed foods.
- What stands in the way of broader consumer appeal and preference:
  - Lack of a clear, consistent, consumer-friendly definition
  - RA remains difficult to recognise at point-of-sale
  - Consumers struggle to distinguish RA from organic and other kinds of sustainable farming
  - Certification and labelling are not yet standardised, making it hard for consumers to trust RA claim
- Earlier research showed that many consumers did not perceive major problems in common agricultural practices, reducing their sense of urgency for alternatives. As geopolitical tensions have increased and extreme weather events became more frequent and more disruptive to harvests, we now need to understand whether consumers' perceptions have shifted — and whether this leads to a more fertile breading ground for preferring more resilient farming practices.

The need for resilient agriculture is increasing

We're living through a period of overlapping shocks to the European food system. The COVID-19 pandemic, geopolitical events, and extreme weather have sent ripples across supply chains. Farmers have faced economic strain, alongside mounting pressures to comply with environmental standards. These shocks have revealed structural vulnerabilities in the way we produce and distribute our food.

That's why resilient agriculture systems are essential. Europe needs new agricultural models that can absorb, adapt to, and transform in response to shocks - while continuing to provide food, livelihoods and protect ecosystem services. This is not a 'nice to have': It's essential for feeding Europe (and the world) in a fair, sustainable way.

What is Resilient Agriculture?[1]

- Resilience matters at two linked levels. First, at farm and landscape scale: practices such as regenerative soil management, diversified rotations, agroforestry and smarter livestock integration build healthier soils, more biodiversity and better water retention that reduce vulnerability to droughts, floods and pest outbreaks.
- Second, at system scale: stronger supply chains, improved data-sharing, financing instruments that reward stewardship, and governance that supports living labs and farmer-led innovation make the whole food system less brittle.

This page is a verbatim excerpt from: EIT Food, *Building resilient agriculture: why EIT Food's new think & do tank can drive change*, 03/11/2025

Resilient agriculture, at farm and landscape scale, delivers demonstrated environmental and social benefits.

Resilient agriculture (RA) is a holistic farming approach that aims to restore and enhance the health of agricultural ecosystems. It focuses on improving soil health, increasing biodiversity, and promoting sustainable farming practices that can lead to long-term environmental and economic benefits. Unlike conventional farming, which often relies heavily on synthetic inputs, RA emphasizes natural processes and ecological balance.

Key Principles of Resilient Agriculture (at farm and landscape scale) [2]

- **Soil Health**: RA prioritizes the restoration of soil health by enhancing organic matter and microbial diversity. Healthy soils are crucial for nutrient cycling, water retention, and overall ecosystem resilience
- **Biodiversity**: RA encourages the integration of diverse plant and animal species within farming systems. This diversity helps to disrupt pest cycles, improve resilience to diseases, and enhance ecosystem services
- **Minimal Disturbance**: Practices such as reduced tillage or no-till farming are essential in RA. These methods help maintain soil structure, prevent erosion, and promote the proliferation of beneficial soil organisms
- **Continuous Soil Cover**: Keeping the soil covered with crops or cover crops throughout the year protects it from erosion, enhances moisture retention, and supports microbial life
- **Integration of Livestock**: RA often includes livestock in farming systems through practices like rotational grazing, which can improve soil fertility and carbon sequestration while mimicking natural ecosystems
- **Reduction of Synthetic Inputs**: RA aims to minimize or eliminate the use of synthetic fertilizers and pesticides, relying instead on organic inputs such as compost and manure to nourish the soil

Resilient agriculture, at system scale, strengthens the food system's ability to absorb shocks, adapt, and keep delivering stable outcomes over time.

Key Principles for Building Resilience at System Scale[1]

- **Stronger supply chains:** Diversify sourcing, regions, and crops to reduce single points of failure. Strengthen coordination between farms, processors, and buyers to improve continuity during shocks. Build flexibility into logistics and procurement so the system can adapt quickly when disruptions occur.
- **Improved data-sharing:** Create shared visibility into outcomes, risks, and performance to support faster, better decisions. Use consistent measurement (where possible) to compare what works across contexts and accelerate learning. Enable trust and collaboration through privacy-respecting, farmer-centered data practices.
- **Financing instruments that reward stewardship:** Shift incentives so long-term land and resource stewardship is financially recognized, not penalized. Reduce transition barriers with tools like performance-linked lending, risk-adjusted insurance, and outcome-based incentives. Share risk across the value chain so adoption can scale beyond early adopters.
- **Governance that supports living labs and farmer-led innovation:** Fund and enable "living labs" where practices can be tested under real-world conditions and improved iteratively. Put farmers at the center of innovation so solutions fit local realities rather than forcing one-size-fits-all models. Support partnerships, standards, and programs that turn experimentation into scalable, repeatable progress.

Knowledge and awareness about RA among consumers is still low

Awareness of RA remains low despite increasing attention from media, producers, corporates, and politicians. While some consumers may recognize the term "regenerative agriculture," most of them still have only a surface-level understanding, shaped by broad agricultural themes rather than by personal benefits.

Few studies have been conducted in the last 5 years to measure consumer awareness and acceptance of regenerative agriculture (the landscape- and farm-level of resilience agriculture).

In Europe

A questionnaire conducted by AHDB and YouGov in May 2021, found that only 14% of British consumers have heard of regenerative agriculture.[3]

On the other hand, market research agency VYPR found that more than two-thirds (67%) of consumers in the UK have heard of the term 'regenerative farming' and 24% say they understand what it means [4] . Based on other measurements (including in other countries), this may be an overestimation.

24% of Europeans say that they currently eat from regenerative agriculture as much as possible[5]. Intention to eat products of regenerative agriculture is found to be at the same level. The most likely reason for such low scores on intention for future diet is likely the lack of familiarity with the concept.

In the U.S.

In the U.S. In 2022, IFIC reported that 19% of U.S. consumers had heard of it[6], while Regenified estimated a slightly higher 26% familiarity among general consumers (U.S.)[7]. Another study by Purdue University found that 57% of U.S. consumers are at least slightly familiar with the term [8].

Kiss the Ground found that in 2025 6.8% of U.S. adults say they understand its significance, up from 4% in 2024. While the trend is positive, only a small proportion of consumers understand the concept.[9]

Consumers mostly do not perceive major problems in common agricultural practices

The lack of problem perception is linked to a reduced sense of urgency for alternative farming practices.

Previous research[10,11] found that consumers do not have many concerns about conventional agriculture. Many Europeans view (conventional) agriculture with admiration and sometimes a source of national pride. The problems it bring along with it are not widely recognized.

Most consumers do not think too much about the different agricultural methods that produce their food. However, when asked specifically about the disadvantages, the primary concern consumers have is the presence of chemicals in fresh foods (pesticides and fertilizers).

As geopolitical tensions have increased and extreme weather events became more frequent and more disruptive to harvests, we now need to understand whether consumers' perceptions have shifted — and whether this leads to a more fertile breading ground for preferring more resilient farming practices.

Current definitions reflect a scientific and practitioner perspective rather than that of consumers

A consumer-centric definition is lacking, which possibly explains low awareness and understanding about regenerative agriculture

Many consumers associate regenerative agriculture with positive environmental outcomes, such as soil health and biodiversity, but they often lack a clear understanding of the practices involved. For instance, the most common words used to describe regenerative agriculture included "soil," "health," and "land," reflecting a focus on environmental benefits rather than specific practices. [11,12]

Several studies found that while many consumers could guess the meaning of regenerative agriculture based on the term "regenerate," their actual knowledge of the practices involved was limited. [8,12]

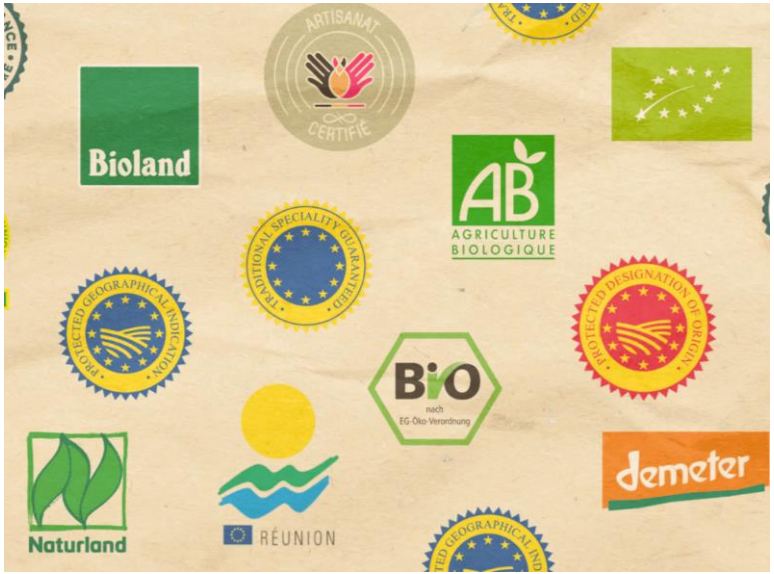
This suggests that while there is a general interest in regenerative agriculture, the specifics of regenerative agriculture remain unclear to most.

Many consumers recognized the term but often confused it with organic farming, indicating a lack of clear differentiation in consumer minds.[11,12]

RA products remain difficult to recognise at point-of-sale

Limited access to RA products, low recognition of RA products in the marketplace, low differentiation from organic

- Regenerative agriculture (RA) is hard to identify at the point of sale, with few cues helping shoppers recognize RA products. [11]
- Consumers often conflate RA with organic, using the terms interchangeably—highlighting a need for clearer education on how RA differs and what specific benefits it claims to deliver. [11]
- Certification and labeling are not yet standardized, which limits trust and makes RA claims difficult for consumers to verify. [11]



Consumers respond more strongly to personal benefits than to farming methods.

Consumers tend to engage more with regenerative agriculture when it's framed around clear, personal outcomes like healthier, tastier food and fewer chemicals. Specific farming practices on the other hand can feel technical or abstract.

Consumers across various regions, including the United States, United Kingdom, and Germany, believe that food produced through regenerative practices is healthier than conventionally produced food. This perception is primarily due to the absence of synthetic pesticides and fertilizers, which consumers associate with better nutritional quality and safety. [11,12]

Some consumers expect that regenerative agriculture leads to higher nutrient density in food products. This expectation is supported by the understanding that healthier soils produce more nutritious food. [7]

RA is more relevant for some foods than others

Consumers associate RA with plant foods more than others

- Recent studies found that consumers see RA as most relevant for fresh produce and animal products, and less relevant for processed foods. [11]
- Consumers were asked to identify which products can come from regenerative farming. Vegetables (50%), grains (45%), and fruit (37%) were selected most often, indicating a strong association with plant-based ingredients. Awareness was lower for animal products: fewer than one-third identified dairy (28%) or meat & poultry (28%). This suggests a perception gap, potentially driven by viewing regenerative farming as primarily "grown-from-the-ground" and/or by a perceived link between plant-based diets and environmental benefits. [4]

References

[1] Building resilient agriculture: why EIT Food's new think & do tank can drive change (2025)

[2] Regenerative Organic Agriculture and Human Health: The Interconnection Between Soil, Food Quality, and Nutrition

[3] Consumer awareness of regenerative agriculture (2021), AHDB

[4] Consumer Horizon: Regenerative farming 2025 VYPR

[5] Trust Tracker, 2025, EIT Food's Consumer Observatory

[6] Consumer Perspectives on Regenerative Agriculture, 2022, IFIC

[7] Exploring Consumer Appetite for Regenerative Agriculture: Regenified's 2024 Consumer Report

[8] CONSUMER FOOD INSIGHTS (2024), Center for Food Demand Analysis and Sustainability, College of Agriculture, Purdue University

[9] Kiss the Ground Research 2025

[10]Consumer perspectives on agriculture (2024), EIT Food's Consumer Observatory

[11] Cultivating Resilience Consumer perceptions on regenerative agriculture (2025), EIT Food's Consumer Observatory

[12] Regenerative Agriculture: Understanding the Current State And Future Potential Of Regenerative Agriculture In The United States, United Kingdom, And Germany

About the EIT Food Consumer Observatory

Powered by EIT Food, the Consumer Observatory brings together experts and consumer insight organisations from across the food system to curate and produce consumer insights, trend analysis and research tools.

By combining research expertise, sector knowledge and the green transition behaviour change perspective, the Consumer Observatory aims to maximise the availability of consumer insights on agrifood topics, delivering greater knowledge, strategy and guidance to agrifood stakeholders – helping to bring about positive change in the food system.

This platform puts consumer knowledge and behaviour at the heart of the conversation on food sector trends, driving forward innovative solutions that will help to achieve EIT Food's three missions:

- A Net Zero Food System
- Healthier Lives Through Food
- Reducing Risk for a Fair and Resilient Food System

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