



Growing Regenerative Agriculture: How businesses can help deliver impact at scale



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Partner foreword



Welcome to our latest report, created in collaboration with Footprint. Building on insights from our earlier exploration of regenerative agriculture, this new report looks ahead – examining how the practice can be scaled swiftly, while still delivering meaningful environmental and social impact. It reflects on how far the conversation has come, and the critical ground we still need to cover.

At Nestlé Professional, we recognise the crucial role the foodservice sector plays in shaping the future of agriculture. We are

not just consumers of ingredients – we are partners to farmers, supply chain stakeholders and ultimately, stewards of the land. Regenerative agriculture is a framework for action. One that, if implemented with integrity, scale and collaboration, has the potential to transform food production into a force for environmental restoration and resilience.

The facts laid out in this report are sobering – climate volatility is a present reality. From intense heatwaves to unprecedented flooding, the agricultural sector is on the frontline. This uncertainty is taking a toll on yields, input costs and the long-term viability of farming as we know it. That’s why Nestlé has made a strategic, global commitment to source 50% of our key ingredients from farmers adopting regenerative agriculture practices by 2030 and 20% by the end of 2025. These are milestones we’re working towards with urgency and determination, having already reached 21.3% by 2024 – one year ahead of schedule.

Our UK focus includes critical ingredients such as dairy and wheat, while our NESCAFÉ Coffee Plan, for example, sees us invest over 1bn Swiss francs to help coffee farmers make the transition to regenerative agriculture.

For many of our suppliers, adopting regenerative practices is a fundamental shift. And we understand that transformation takes time, support and shared responsibility. That’s why we’re investing in long-term partnerships, providing technical assistance, and helping farmers navigate the transition – both with what they grow, and how they grow it.

This report rightly highlights that regenerative agriculture is not yet a defined destination, but rather a spectrum of practices with shared outcomes, such as healthier soils, improved biodiversity and greater resilience to climate shocks.

We know we cannot do this alone. Cross-sector collaboration is essential – not only between businesses, but with scientists, financial institutions, policy makers and farmers themselves.

There is no single pathway to a regenerative future. But there is a shared direction. Nestlé Professional is committed to walking that path alongside our industry peers, our farming partners, and our customers. Regenerating the land that feeds us is not only good business, it’s the right thing to do.

Julia Jones
head of sustainability & corporate communications, Nestlé Professional



Introduction

How can regenerative agriculture be scaled quickly while delivering environmental and social impact?

Two years have passed since Footprint published our first report on regenerative agriculture: *Is regenerative the future of farming*¹? Since then, the need to put the global food system on a more sustainable footing has grown ever more urgent.

Evidence continues to mount over agriculture’s vulnerability to a warming planet. 2024 was the hottest year on record, with global temperatures exceeding 1.5°C above preindustrial climate conditions for the first time. Extreme weather events exacerbated by climate change are driving up prices of basic commodities – from olive oil and vegetables to cocoa and coffee, according to a study published in July 2025 in the *Environmental Research Letters* journal².

Across the UK, 2025 broke seasonal climate records for warmth and sunshine, according to the Met Office. Yet just six months previously, the same organisation had recorded the wettest September on record for some English counties including Bedfordshire and Oxfordshire.

The impacts on farm businesses of wildly oscillating weather patterns cannot be understated. Farmers are grappling with huge variations in germination rates, yields and quality. As we explored

in detail in our first report, conventional high-input, high-output agricultural systems that have come to dominate the UK and global farming landscape since the Second World War are increasingly ill-equipped to cope with weather extremes. Declining soil health has made farmland more susceptible to flooding and drought, while falling rates of biodiversity have deprived farms of the natural ecosystem services provided by pollinators and predators. Farmers operating on already thin margins face a precarious future in which financial volatility is baked into their business model.

Rewiring the system

This sober analysis of the challenges facing modern agricultural production also provides the context for increasing interest in regenerative agriculture. It reflects a growing recognition among farmers, food businesses, policy makers and financial institutions, of the need to rewire the food system in a way that builds resilience to future environmental and financial risks.

Although it still lacks a universally agreed standard there is growing alignment around the principles of regenerative agriculture. These include maintaining soil cover and living

“Although it still lacks a universally agreed standard there is growing alignment around the principles of regenerative agriculture.”

roots, fostering plant diversity, reducing soil disturbance and integrating livestock or livestock sources where possible. The outcomes regenerative agriculture is designed to deliver – healthy soils, biodiversity, water storage capacity and carbon sequestration, as well as social wellbeing and financial security – are generally agreed to be intrinsic to the future sustainability of our food system.

The central question we seek to answer in this report – the third in the series following 2024’s *Unlocking the community benefits of regenerative agriculture from field to fork*³ – is how can regenerative agriculture be scaled quickly while still delivering measurable environmental and social impact?

Step change

To understand the scale of change needed we first need to

“We believe that greater adoption of regenerative agriculture practices will create a more resilient agricultural sector.”

James Young, VP of Agriculture, McCain GB&I.

understand the starting point. It is not straightforward to measure the scale of adoption of regenerative agriculture given the lack of an agreed standard, however analysis featured in a report from the Sustainable Markets Initiative’s (SMI) Agribusiness Task Force, *Scaling Regenerative Farming: an action plan*⁴, estimated that regenerative farming accounted for 15% of global cropland in 2022. That figure needs to grow to at least 40% by 2030 to limit climate change to 1.5 °C, according to the study carried out for SMI by Systemiq.

Delivering such a step change in farming will require commitment from across the food system. A number of multinational food businesses have already set stretching targets for adoption of regenerative agriculture within their value chains. Nestlé achieved its aim for 20% of key ingredients to be sourced from farmers adopting regenerative agricultural practices by the end of 2025 one year early, and is aiming for 50% by 2030. “That’s a significant shift,” says Michael Warmington, regeneration lead for Nestlé UK & Ireland, who explains that the global nature of the target means different regions will centre their efforts on different commodities. In the UK, the focus includes dairy, cereals (including

wheat, oats and barley), and sugar. “In some of those sectors, regenerative farming would be a wholesale change in how they are produced,” Warmington adds.

PepsiCo is targeting 10 million acres of regenerative agriculture by 2030 and says it is on track to deliver 3.5 million acres by the end of 2024.

McCain, meanwhile, has a commitment to implement regenerative agricultural practices across 100% of its potato acreage worldwide by the end of 2030. Erratic weather patterns, rising input costs and geopolitical uncertainty are all placing significant strain on the potato growing sector. “These growing pressures highlight the urgent need for more resilient and sustainable farming practices,” says James Young, VP of agriculture at McCain GB&I. “We believe that greater adoption of regenerative agriculture practices will create a more resilient agricultural sector, lower long-term costs for farmers, increase food security in the UK and help to improve the natural environment.”

Large foodservice operators are also invested in supporting the shift to regenerative agriculture. In 2021, Compass Group UK & Ireland set a target to source 70% of its fresh meat, vegetables and dairy from

regenerative agriculture sources by 2030. That target is currently under review, with an updated goal set to be published by the end of 2025. Since it set the original target, Compass says it has become increasingly aware of the challenges in accurately modelling the impact and scalability of regenerative farming. “We need better data and better definitions; so our modelling is anchored in the specifics of our supply chain and current commercial realities; and so we arrive at a practical approach that isn’t overly simplistic,” the company acknowledged in its 2024 Climate Transition Plan⁵.

Better together

This frank admission from the world’s largest catering company speaks to some of the barriers businesses across the supply chain will have to overcome in scaling their support for regenerative agriculture and meeting internal targets. It also helps explain the recent growth in collaborative initiatives that aim to bring a wide range of stakeholders together to scale regenerative agriculture, in recognition of the need for alignment from businesses on how to improve the health, productivity and resilience of landscapes they all rely on.

In March 2025, members of the SMI including McCain Foods, McDonald’s, Lloyds Banking Group, Waitrose & Partners, NatWest and Barclays came together to launch ‘Routes to Regen’, a lighthouse project that aims to demonstrate how regenerative farming can be made into a more attractive business proposition for UK farmers when supported by cross-sector collaboration.

This year has also seen the launch of Exchange Market, an insetting scheme overseen by Soil Association Exchange, which allows businesses within a farm’s value chain to make payments to farmers in return for a verifiable reduction in on-farm carbon emissions.

Landscape Enterprise Networks (LENs) continue to bring together businesses, public bodies, NGOs, farmers and land managers to identify and invest in shared commercial land management needs that would be difficult to tackle within their own supply chain in isolation, such as mitigating flood risk, meeting greenhouse gas emissions reduction targets, increasing biodiversity and improving water quality. There are now six LENs regions active across the UK and Europe.



Despite progress in collaborative efforts, a recent SMI study into scaling regenerative farming concluded that the reach of such schemes remains limited in the UK and is more prevalent in some sectors such as dairy, red meat and arable, than others⁶. Where schemes are in place, many are nascent and/or their impact is limited by the scale of resources

available to the scheme provider, meaning there are significant parts of the agricultural sector not being reached. In order to facilitate large-scale investment in regenerative agriculture, SMI identified a need for greater alignment on farm-level expectations, metrics and measurement across the public and private sectors.

Positive results

Those investing in regenerative agriculture need to be confident it is delivering results. In this regard, a major new study into regenerative farming has given cause for cautious optimism. The European Alliance for Regenerative Agriculture (EARA) assessed 78 regenerative farms in 14 countries covering over 7,000 hectares against their neighbouring and national average conventional farmers⁷. It found that between 2020 and 2023, regenerative farmers achieved, on average, just 1% lower yields in terms of kilocalories and proteins, while using 62% less synthetic nitrogen fertiliser and 76% less pesticides per hectare. For the purposes of the study, EARA developed its own multidimensional index of agricultural and ecological productivity that showed regenerative farmers made gains ranging from 24% to 38% versus the average European farmer across the 14 countries studied.

We should be cautious of reading too much into a single, small-scale study that assessed farms already well advanced on the regenerative journey. Indeed, as we explore in this report, a key requirement for scaling regenerative agriculture is for stakeholders to support farms right from the very start of the transition period when yields

can fall initially before recovering and capital costs are incurred in switching to new machinery and practices.

It's also important to acknowledge there remains scepticism in certain quarters over some of the claims being made around the benefits of regenerative agriculture and the extent to which results of small-scale trials can be replicated at scale. In a May 2025 webinar hosted by the Food and Farming Journalism Network, climate scientist Jonathan Foley suggested that “when scientists actually look at the data, they come back pretty sceptical, because time and time again we’re finding that the results of real field trials, replicated at scale, aren’t producing the results we see in the movies”, (a reference to influential documentaries like *Kiss the Ground* and *Common Ground*)⁸.

Yet there is growing recognition too that widespread adoption of the principles of regenerative agriculture on conventional farms will be crucial in building a more resilient food system as part of a spectrum of more sustainable farming that incorporates the more rigid requirements of organic certification and the holistic approach of agroecology, alongside other nature-friendly systems.

Outcome alignment

Regenerative agriculture exists across a broad spectrum and is not easily defined. As yet, there is no agreed, fixed point at which a farm transitions from a conventional to a regenerative system – a grey area that helps explain some of the criticism levelled against the mainstream regenerative movement. There is however growing consensus over the outcomes it should deliver and how these can be measured and reported in a standardised way, as we discuss in *Chapter One*.

Moreover, part of the mainstream appeal of regenerative agriculture lies in its flexibility and context-specificity. “If it’s very constrained by rigid practices then that’s a challenge to adoption,” says Warmington. “To make regenerative agriculture work, there

“To make regenerative agriculture work, there has to be some flexibility built into the system.”

Michael Warmington, regeneration lead, Nestlé UK & Ireland

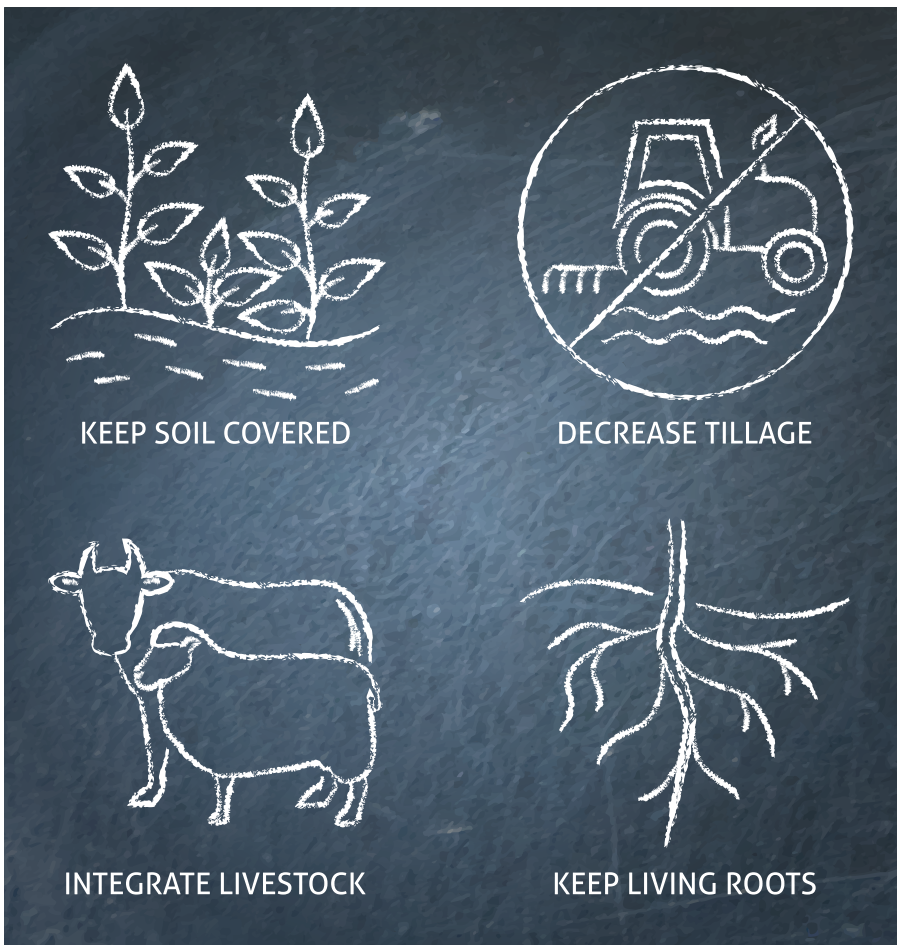
has to be some flexibility built into the system.”

Practices such as cover cropping, crop rotations, minimum tillage, maintaining living roots, integration of livestock, and agroforestry are now widely accepted as part of the toolkit of options available to farmers. It is assumed – and in some places being evidenced – that adoption of these practices will, over time, deliver positive outcomes like increased soil organic matter, lower greenhouse gas emissions, improved water retention and biodiversity, which in turn will make farms more resilient to extreme weather and deliver improved profitability and financial stability in the long-term.

That, in a nutshell, is the theory behind regenerative agriculture and its ability to deliver positive impact when scaled.

Businesses operating within the foodservice and hospitality sector and its supply chains have a key role to play in helping farmers adopt these principles by providing a consistent market for food and drink grown in regenerative systems and supporting the transition through financial assistance, knowledge exchange and building demand among consumers. Many are already doing so, as we detail in *Chapter Two*.

Yet companies must ensure



they are supporting regenerative agriculture in a way that delivers genuine impact at a farm-level and maintains the integrity of the term. In the rush to drive investment in regenerative approaches, there is legitimate concern that the term is already being used publicly to describe agriculture across such a broad spectrum that

it risks becoming meaningless and breeding cynicism among consumers. In *Chapter Three* we discuss that risk in depth and explore how it can be mitigated when talking directly to the public.



CHAPTER 1

The Farmer

Producers will need financial and technical support if they are to make a successful transition to regenerative agriculture.

For its proponents, a key strength of regenerative agriculture is that it is rooted in the farm-specific context and does not seek to prescribe a set of practices farmers must follow. Indeed, as land being farmed under regenerative principles increases, there is broad consensus that farmers need to be at the heart of driving these efforts – not dictated to by more powerful supply chain actors.

Farmers do, however, need the support of buyers to invest in the transition. Managing the shift to regenerative agriculture is challenging; it can require upfront investment in new equipment, a willingness to adapt and learn new techniques, and a shift in mind-set regarding how success is measured.

“Farmers are enamoured by yield but it can be detrimental if it’s all you focus on,” said Stuart Johnson, a mixed farmer from Northumberland, during a session at the 2025 Groundswell festival of regenerative agriculture.

Johnson, who also works for regenerative agriculture consultancy Understanding Ag, detailed the dangers of yield “tunnel vision” as he encouraged farmers to focus instead on margin. These include the risk of input dependency, soil degradation, financial pressures, stress to

humans and livestock (in lower welfare systems) and loss of ecological resilience.

Johnson explained how the single biggest change he has made on his own farm was moving to an adaptive multi-paddock (AMP) grazing system in which cattle graze small patches of pasture intensively for short durations between long periods of rest in order to catalyse grass growth, improve the soil structure and increase biodiversity. The system allows Johnson to keep the cows outside over the winter, reducing spend on bought-in feed and improving the resilience of the land to water scarcity and surplus. “We can’t control the weather but we can control how it impacts us,” he said.

Johnson also explained how over time he has invested in stacking enterprises on top of his core farming business to boost profitability, including tulip growing, pick-your-own wild flowers and selling honey from his own bees.

Risk vs reward

This aspirational view of what a profitable farming system can look like may not reflect the current reality for many farmers who are at the start of their regenerative

journey. Even those that are further down the line warn that farmers continue to take on the majority of the financial risk in transitioning to nature-friendly practices.

“Even those that are further down the line warn that farmers continue to take on the majority of the financial risk in transitioning to nature-friendly practices.”

Suffolk arable farmer Patrick Barker has been on a journey towards more regenerative farming over the past decade, embracing techniques such as cover cropping and integrated pest management. Speaking at a Footprint forum on regenerative agriculture in March 2025, Barker, who helped establish the High Suffolk Farm Cluster with the support of the LENs programme, noted how farmers are generally open to doing things differently but those embarking on a transition to nature-friendly farming currently carry all of the risk. “We do the farming, we



choose the crops, we choose the varieties, we battle the weather, we work out how to do things,” he explained. Barker is working within the cluster and with buyers, like Nestlé, to explore how that risk can be better shared moving forward and how to create value for things

like wildlife, biodiversity, and clean water that don’t have a monetary value.

Evidence suggests it can take a number of years for the financial case for regenerative farming to become compelling for farmers. A recent report developed

collaboratively by One Planet Business for Biodiversity (OP2B), Deloitte, PepsiCo and Unilever analysed the economic impact of transitioning to regenerative agriculture at the farm level⁹. It concluded that the farmer business case for implementing

the six most common regenerative agriculture practices is positive after 3 to 5 years for all farm sizes versus conventional practices, with projected yield increases and reduction of costs the main drivers. Differences in profitability could mostly be explained by crop types, rotation schemes, farm sizes, and stage of transition to regenerative agriculture practices.

The report also found that, irrespective of future profitability, farmers are confronted with significant upfront costs before implementing regenerative agriculture practices and that existing incentives are not sufficient to cover the costs of the transition at farm level. “Moreover, we found that current incentives are not fit-for purpose. They focus mainly on supporting ongoing costs rather than the much-needed funding for upfront investments, and are often not built around specific farmer needs and desired outcomes of the regenerative agriculture practices, leading to undesired consequences such as mono-cropping,” the report stated.

Farmer support

Businesses that have set targets to increase the contribution of regenerative agriculture within their supply chains say they are

**CASE STUDY:
Exchange Market provides cash for carbon**

Downstream food businesses like retailers and manufacturers are increasingly looking for ways to help farmers de-risk the transition to sustainable farming. The Exchange Market insetting scheme, run by Soil Association Exchange, enables businesses within a farm’s value chain to make payments to farmers in return for a verifiable reduction in on-farm carbon emissions. Farms are baselined for crop-level emissions and then build an action plan with a Soil Association Exchange adviser. Emissions outcomes are verified and reported to supply chain partners; who can use that data to evidence progress towards their own scope 3 emissions targets.

“What we’re hearing from farmers is that they’re really keen to do a lot more activity that is nature- friendly, low emissions and in line with regenerative or organic principles, but there are some barriers preventing them for doing so or slowing them in some cases,” says Louise Rezler, director of commercial partnerships at Soil Association Exchange.

In some cases, Rezler says farmers may need “repeated funding injections that enable them to de-risk new actions while they adapt to them, particularly actions which may have an impact on yield”. Reducing the use of nitrogen fertiliser, for example, can impact yield in the short-term as well as impacting the grade of crops, like wheat, which is linked to the price the farmer receives. “There’s a lot to balance and to think about in terms of the whole farm system, even if farmers are just potentially changing one practice,” says Rezler.

Foodservice businesses, including distributors, caterers and restaurants, are not yet involved in the Exchange Market scheme, but Rezler is keen to state the benefits to businesses wherever they sit within the value chain. “Getting involved with something that enables you to connect with your supply chain in a really practical way is a great opportunity that enables you to tell stories that currently you can’t tell and quantify the kind of impact that you want to have. And, critically, Exchange Market offers businesses the opportunity to share the cost of farm transition with others that are also reporting on farm impact – whether foodservice, processors, merchants, brands, retailers, lenders, landowners, or beyond.”



working to deliver the support producers need to commit to a long-term transition. For McCain, Young says this includes support with knowledge exchange via expert-led training, interactive

grower meetings, and on-farm demonstrations.

To address the financial barriers that growers face in getting started on their regenerative journey, Young says McCain has introduced

a range of support initiatives, including regenerative agriculture loans and incentive schemes, as well as targeted partnerships that provide direct support to farmers. These include the Sustainable Fries Fund, created in partnership with McDonald's UK, which offers grants to help growers invest in soil health and water efficiency. The company has also partnered with NatWest to offer McCain potato growers in the UK preferential loan terms to reduce the financial barriers to regenerative adoption. Young says initial results from McCain's 'farms of the future', which are most advanced in their adoption of regenerative techniques, indicate that "after an average transition of seven years, growers who adopt regenerative practices are more competitive in the long term".

Collaborative projects like 'Routes to Regen' are also looking to tackle the financial barriers facing farmers looking to transition. The project, which is managed by The Royal Countryside Fund, stops short of offering direct payments to farmers but it does provide a menu of financial support including business planning advice, discounted seeds for cover crops and pollinators, weather insurance and advice on how to make best use of public funding schemes.

"Policy should be the strong foundation that gives farmers confidence to go in a certain direction."

Will Strong, regenerative agriculture manager, Nestlé UK & Ireland.

Policy puzzle

The UK Government is in the process of transitioning away from direct farm payments received under the EU's Common Agricultural Policy to a new system of farm support based on the principle of public money for public goods.

In theory, this shift is favourable to farmers who want to adopt more regenerative systems albeit there are ongoing concerns over lack of funding for the government's environmental land management (ELM) scheme which offers tiered rewards for farmers delivering ecosystem services. Speaking during Groundswell 2025, National Trust chief executive Hilary McGrady said the current budget for sustainable farming "still falls considerably short of what we think we need to restore nature".

Will Strong, regenerative agriculture manager for Nestlé UK & Ireland, suggests a stable policy environment is needed to give farmers – and by extension their supply chain partners – the confidence to invest in regenerative agriculture for the long-term. "Policy should be the strong foundation that gives farmers confidence to go in a certain direction, that then gives confidence to private markets to

continue to work in that space."

One emerging market trend is for private sector organisations that rely on healthy ecosystems to make direct payments to farmers for delivering beneficial environmental services. Andy Cato, co-founder of regenerative flour and bread producer, Wildfarmed, has spoken of how some of its wheat growers are receiving direct payments from water companies linked to the improved water storage capacity of their soils which reduces nutrient runoff into local rivers.

In its recently published practical guide for scaling regenerative farming, SMI suggested that clearer signposting on how incentives from one scheme could be stacked with other private schemes or public sector subsidies and grants could help encourage greater adoption¹⁰.

Carbon focus

One of the main reasons why businesses have developed finance schemes for regenerative agriculture is the need to decarbonise their supply chains. SMI, however, emphasised how regenerative agriculture delivers broader benefits such as soil health, water quality and biodiversity. In order to track progress towards positive regenerative agriculture outcomes, it said it is important

to measure other data as well as greenhouse gas emissions, which viewed in isolation is not always a good proxy for a sustainable farming system.

Efforts are ongoing to harmonise the outcomes that regenerative agriculture should deliver. In 2024, the World Business Council for Sustainable Development (WBCSD) and the OP2B coalition brought together 1,100 private sector actors to align on a shared vision for regenerative agriculture, identifying 11 cross-sectoral outcomes that represent best practice in scaling and measurement¹¹. The outcomes (see table) have been developed to complement existing sustainability frameworks and tools including the Sustainable Agriculture Initiative platform, Taskforce on Nature-related Financial Disclosures, GHG Protocol, Textile Exchange, Regen10 and Field to Market.

A subsequent report assessing the publicly disclosed information of 38 leading agri-food companies found that businesses are converging on a shared vision for regenerative agriculture, but in order to scale impact companies need to turn commitment into action by embedding shared outcomes and aligned metrics across sourcing, innovation and investment strategies¹².

Outcome-based metrics for scaling regenerative agriculture

- Minimise greenhouse gas emissions
- Increased sequestered carbon
- Improved ecological integrity
- Increased cultivated biodiversity – crop diversity
- Reduced pesticide risk
- Minimised water pollution
- Improvement environment flows
- Increased soil health – soil organic carbon
- Increased financial benefits – farm net income
- Increased social benefits
- Increased wellbeing

Source: WBCSD & OP2B, 2025¹³

Metrics and methodologies

Work towards harmonising metrics and methodologies for measuring many of the desired outcomes from regenerative agriculture remains a work in progress. Ongoing efforts by collaborative initiatives like the Global Farm Metric intend to create a holistic framework for measuring whole-farm sustainability. In June, the GFM published the latest version of its framework featuring a wide range of indicators spanning areas like soil, water, land use, biodiversity, community and economics¹⁴.

Yet even once farmers are in a position to measure a range of indicators in a cost-effective way, desirable outcomes may take several years to be realised once a farm has begun the journey to regenerative farming. That’s why businesses offering financial support to farmers adopting regenerative principles are often linking these to practice changes rather than outcomes.

“Within all of the programmes we have, such as the Milk Plan (in partnership with First Milk) and LENs, the reward is on the action while acknowledging that action

does have an outcome,” explains Nestlé’s Strong. “As time goes on and we see more of the information collected on outcomes and what’s been delivered, then that just serves to improve our overall understanding [of regenerative farming].”

One of the tensions that will need to be managed as regenerative agriculture scales is how to balance the need of farmers to maintain flexibility and respond to a dynamic set of local circumstances with the market need for consistent data in order to price outcomes and support businesses’ own environmental objectives and reporting.

Although many interviewees for this report warned of the risk of “carbon tunnel vision”, it remains the case that agricultural emissions is one of the few indicators that can be measured with a relatively high degree of accuracy and harmonisation. It’s also a key metric for reporting progress against businesses’ public net-zero commitments.

Software solutions provider Mondra develops LCA-based, product carbon footprints for over 50% of the UK food system. Its chief product officer, Tom Holden, says there has been a big drive from businesses to integrate primary

farm level data into LCAs so they can evidence emissions reduction when farms within their value chains adopt more sustainable practices.

“Far fewer people are talking about net-zero and more are talking about resilience and supply chain risk.”

Tom Holden, chief product officer, Mondra

Yet Holden has also identified a recent shift in motivation for businesses investing in sustainable farming, away from decarbonisation as a goal in its own right and towards broader business resilience. “That’s the big pivot in the industry this year,” he says. “Far fewer people are talking about net-zero and more are talking about resilience and supply chain risk. That’s where regenerative farming is playing a really strong role. A regenerative farm is likely to be a more resilient farm.”

Looking forward, the ability to measure a range of outcomes in a harmonised way will be a key guardrail in ensuring the term regenerative isn’t being used to champion farming that is merely



tinkering around the edges of conventional agriculture rather than changing farming systems. Patrick Barker pointedly described his approach as “creating a whole farm ecosystem, as opposed to just a green industrial estate with nice flowery bits on the edges”.

As we explore in *Chapters Two and Three*, downstream businesses have a key role to play in guarding against accusations of greenwash and ensuring the integrity of approaches that use the regenerative descriptor.

CHAPTER 2

The Supply Chain

Food businesses both large and small will need to come on the regenerative journey and help remove structural barriers to scale.

Regenerative agriculture will only deliver impact at scale if supply chains can evolve to ensure a commercially viable, sustainable route to market for regeneratively farmed products. What does that mean in practice? Among other things, it means buyers will need to explore longer-term contracting for certain commodities to give farmers confidence to invest. In some cases it will require the development of bespoke supply chains that allow regeneratively produced ingredients in food and drink to be traceable from farm to fork, and ensure that farmers receive a fair share of the profits. And it will require a shift away from adversarial supplier-buyer relationships, where they still exist, to a more open, collaborative culture.

In a 2024 paper on supply chain reform in food systems produced for the Esmée Fairbairn Foundation, sustainable farming consultant Vicki Hird explained how the highly concentrated and highly competitive UK food sector creates problems for nature and society with its reliance on producing “cheap, uniform commodities” like grains, sugar, and commodity meat and dairy¹⁵. These have the biggest impact on the environment, noted Hird, yet supply chain initiatives aimed at supporting nature-based

farming tend to focus on local and higher value items like horticulture and speciality meat.

Beefing up AMP grazing

If that 40% by 2030 target for regenerative agriculture identified by the SMI’s Agribusiness Task Force is to be achieved, large businesses sourcing mainstream commodities at scale will need to come on the regenerative journey too.

McDonald’s is one of the world’s biggest buyers of beef. In the UK, the restaurant chain has been supporting a small-scale pilot led by FAI Farms to see how the adoption of an adaptive multi-paddock (AMP) grazing system at the FAI beef farm can help lower carbon emissions and deliver improvements in other

key environmental, economic and social indicators.

After four years (2020-2024) the farm was modelled to be beyond net-zero (using Trinity Ag Tech’s Sandy tool), suggesting that it sequestered more carbon than was emitted from the beef enterprise¹⁶. Amanda Deakin from FAI Farms, who led the project, advises that we view the study holistically, rather than focusing on this single finding since soil carbon takes many years to accumulate and future physical samples are needed to build accuracy. The study measured over 50 indicators and on other key metrics the AMP grazing system, which sees cows remain on pasture all year round, performed strongly in comparison to the previous rotational grazing system. Not



only did the approach enhance soil structure and support biodiversity (a total of 53 bird species were recorded on the farm using bioacoustic devices, a 23% increase compared with a neighbouring farm employing a traditional set stocking system), it also supported good herd welfare with low requirement for antibiotic use. Productivity increased too, with finishing times of 22-24 months versus a previous average of 26 months.

“One of the great things about AMP grazing is that it’s generally a ‘win win’ in terms of the economics,” says Deakin. “We found we could massively reduce our inputs by moving from a system where we were housing cattle in the winter to one where the cattle were outwintered.”

FAI’s project with McDonald’s UK & Ireland has now expanded to support a group of 11 farmers in the restaurant’s supply chain transition to AMP grazing. Deakin says there’s every reason to believe the findings on a small scale would be replicated at a much larger scale, although she cautions that because regenerative farming is so context-specific “we can never say for certain whether these practices are going to have this impact elsewhere because it will totally depend on the farm. However, this project is a

huge step in the right direction to helping farmers better understand the options they might consider introducing to their own systems”.

Fresh approach

Fresh Direct is another business working within its supply chain to support large-scale farmers adopt more regenerative practices. The fresh produce distributor, part of the wholesale giant Sysco, has recently partnered with Vincent Walsh, the founder and MD at RegenfutureCo who runs a pilot regenerative farm near Harrogate in Yorkshire. Walsh is working with three Fresh Direct growers based in Sussex, Nottinghamshire and Lancashire to implement regenerative practices such as border cropping, tree and shrub planting that will improve the hydrology and biodiversity of the

“We buy fabulous produce but we want to be able to buy fabulous produce in 5, 10, 20 years’ time.”

Andy Pembroke, managing director, Fresh Direct

farms and improve their climate resilience.

“We buy fabulous produce but we want to be able to buy fabulous produce in 5, 10, 20 years’ time,” Fresh Direct’s managing director Andy Pembroke told the Footprint forum on regenerative agriculture. “As a leadership team, we got together and thought about how do we make a commitment and take a stance on something that will deliver meaningful change to our supply chain, [.....] and we settled on regenerative agriculture.”

Pembroke explained that Fresh Direct’s investment in regenerative farming had been driven in part by demand from those working in professional kitchens. “Our customer base is not only encouraging it, in some cases it is demanding it, right from the small independent through to the large PLC,” he said.

Logistical barriers

Fresh Direct and McDonald’s are just two examples of businesses within the foodservice and hospitality sector working to help scale regenerative agriculture via their existing relationships with long-term suppliers. Beyond those mainstream supply chains, however, farmers adopting regenerative principles speak of challenges in



finding an outlet for their produce. Speaking at the 2025 Groundswell festival during a session on reshaping supply chains, farmer and Sustainable Trust chief executive Patrick Holden identified three main barriers to scale – finance, infrastructure and customer demand.

The second of those barriers can sometimes be overlooked compared with matters of finance and demand, but a lack of access to infrastructure remains a key challenge for smaller producers looking to find a secure market

for regeneratively farmed produce. Holden shared how he has recently started supplying carrots to Welsh schools as part of a cross-sector initiative to introduce more organically produced Welsh vegetables into primary school meals across Wales. He explained how he couldn’t have participated in the project without support from friends and neighbours who lent him the machinery to go back into carrot production following a ten year absence, and wholesaler Castell Howell which provided the distribution infrastructure.

“We shouldn’t underestimate the practical challenges of relocating food systems; whether it’s washing, grading, distributing, all that infrastructure used to exist [at a local level, but has now gone],” said Holden.

Speaking on the same panel as Holden, Joseph Meldrum, co-founder of British pulses supplier Hodmedod’s, noted how a lack of scale could act as a barrier to farmers accessing highly specialised supply chains built for efficiency. Consolidation in businesses providing seed cleaning services, for example, has created challenges in accessing logistics infrastructure where farms are producing small volumes of pulses. “The unit of measure for most farmers is 28 tonnes, which is a full load. Any less than that, it starts to get expensive,” Meldrum explained.

Breaking the mould

Such barriers help explain why some hospitality sector brands have chosen to work with producers to create bespoke supply chains for regenerative food and drink. In February this year, the Mexican restaurant chain Wahaca announced a shift to sourcing 100% British regenerative beef across its menu. To ensure full supply chain traceability, Wahaca is working with

Grassroots Farming to purchase around 10 cattle a week from regenerative beef farms across the UK¹⁷. The cattle are supplied into a local abattoir before the carcasses are sent to butchery partner, The Ethical Butcher, and then on to Wahaca restaurants. Previously, the same quantity of meat would have been sourced from over 400 cattle with no traceability back to farm. The new model is made possible by Wahaca's decision to transition to 'slow-cooked' beef that uses multiple, less desirable cuts, resulting in far greater carcass utilisation.

Currently, most beef produced in regenerative farming systems ends up in the same supply chain as beef produced conventionally making farm-to-fork traceability almost impossible. Grassroots Farming co-founder James Evans is confident the bespoke model being pioneered by Wahaca is scalable. "We work with very large farmers and we don't take all of their cattle," Evans explains. "We can quite easily scale this because we're putting cattle into order [from those farms] rather than just sourcing the beef from anywhere. And because we've got different butchery partners for different customers it means we can still provide quite a bespoke service."

CASE STUDY:
Wildfarmed makes waves

Wildfarmed is making waves in the food sector by rewiring a long-established supply chain for wheat.

Wheat is in many ways the ultimate commodity crop; once harvested it disappears into an arcane supply chain before invariably emerging as a loaf of bread or breakfast cereal. The business has created a traceable, end-to-end supply chain offering a route to market for crops grown in regenerative systems that prioritise soil health.

"High street food from a traceable grain supply is unique," says Rob Bray, chief sustainability officer at Wildfarmed. "Doing this at scale has meant an enormous amount of work to create a segregated supply chain. We believe that building a regenerative movement requires food buyers knowing who grew their food and how it was grown."

Wildfarmed has experienced significant growth in recent years as it brings more growers into its orbit (well over 100 now) and strikes partnerships with big-name retailers and brands, including Tesco and Waitrose.

Within the hospitality sector, Wildfarmed has been busy adding to a customer list that already includes brands like ASK Italian and Franco Manca. Nandos' new The Big Cheese burger is being served in a roll made with Wildfarmed regenerative flour, while Jubel's full range of fruit-cut beers is now made using Wildfarmed barley and available on tap in more than 1,000 pubs including Young's and Fullers.

Bray says an increasing number of people are motivated to understand more about, and buy, regeneratively farmed food. "Although it would be fair to say the term 'regenerative farming' hasn't yet gone mainstream, what is definitely true is that people are interested in rivers they can swim in, water they can drink and in being part of the climate solution rather than the climate problem," he says.

"These are all things that we believe regenerative agriculture can help deliver, so even if people don't yet know the exact term, there is a growing proportion of people who do care about regenerative farming and the landscapes it helps to restore."

Go local

The development of local supply chains provides another opportunity for scaling regenerative agriculture. Founder and MD at RegenfutureCo, Vincent Walsh, has been working to extend a strategic relationship with Yorkshire Water to rethink Highfield farm, a 35-acre farm in Yorkshire producing a mix of livestock and fresh produce.

Walsh has long been a champion of the need for better understanding of the hydrology that in his view underpins any regenerative farming system in an era of more extreme weather events. "We need landscapes and farms to hold and sink and spread water and be more efficient with water across 365 days a year," says Walsh. "Our soils are by far the best reservoirs we have. They always have been."

Highfield provides another invaluable test bed for Walsh to explore and extend how to transition a traditional landscape into a regenerative and circular enterprise. Going forward, RegenfutureCo, plans to scale up activity and funding that will invest in similar ecological projects, the idea being that food produced at regenerative farms like Highfield could be used to support supply opportunities at venues operated

"You can't just ask farmers to transition to something more ecological and then not offer them a supply chain opportunity. You need both."
Vincent Walsh, Founder and MD, RegenfutureCo

by the caterer Levy, a partner of RegenfutureCo. "You can't just ask farmers to transition to something more ecological and then not offer them a supply chain opportunity. You need both," says Walsh.

Commercial is critical
Experts like Walsh working at the coal face of nature-friendly farming will play a critical role in the transition to regenerative agriculture at scale, but so too will the commercial teams who in many cases hold direct relationships with suppliers. Through its Milk Plan, farmers supplying Nestlé via its partner First Milk receive a bonus payment for implementing a range of activities on their farms that positively impact the environment and community.
Sobia Naheed, responsible sourcing manager at Nestlé UK & Ireland, says the procurement function has played "a critical role" in changing the way Nestlé contracts with farmers. She explains



“Converting from a traditional farming system takes years and so we can’t leave the farmer part way along that journey.”

Sobia Naheed, responsible sourcing manager, Nestlé UK & Ireland.

how regenerative agriculture requires a different dynamic from traditional procurement contracts with an emphasis on long-term agreements that provide security of supply. “Converting from a traditional farming system takes years and so we can’t leave the farmer part way along that journey, we have to share the risk with them,” says Naheed.

Nestlé buyers are encouraged to visit farms and attend in-house training sessions and webinars on regenerative agriculture, as are members of the wider team including marketing, sales, HR, finance, legal and public affairs. “They are also being engaged because we need their support in the implementation,” says Naheed. Progress against sustainability

targets now forms part of the procurement team’s deliverables, alongside traditional KPIs like quality, quantity and cost. Nestlé has also developed a carbon and sustainability group within the procurement team through which buyers are encouraged to interact with suppliers and find new opportunities to take them on the regenerative journey.

CASE STUDY:
Nescafé plans for coffee’s future

Nestlé plans to invest over 1bn Swiss francs (£0.94bn) between 2022 and 2030 to help coffee farmers transition to regenerative agriculture under the latest phase of its Nescafé Plan¹⁸.

As seen in this year’s harvest, where prices have reached a record high following weather impacts on production, climate change is putting coffee-growing under extreme pressure. Rising temperatures have the potential to reduce the area suitable for growing coffee by up to 50% by 2050. At the same time, many of the 12.5 million families involved in coffee farming globally have household earnings around or below the poverty line.

Nestlé provides coffee farmers with training, technical assistance and high-yielding coffee plantlets to help them transition to regenerative coffee farming practices. Examples of regenerative practices in coffee production include planting cover crops to help protect the soil, incorporating organic fertilisers to improve soil fertility, increasing the use of agroforestry and intercropping, and pruning existing coffee trees or replacing them with disease and climate-change resistant varieties, which will help rejuvenate coffee plots and increase yields for farmers.

Coffee is grown across large areas of the world, from South and Central America to Africa and South East Asia. Farmers are encouraged to adopt practices tailored to their specific national and local context. “Farms practicing regenerative agriculture at an advanced level will look very different from country to country, and that is alright,” explains Marcelo Burity, head of green coffee development at Nestlé.

Burity explains that via the Nescafé Plan, Nestlé is using regenerative agriculture as a key enabler of delivering lower carbon emissions, higher farmer incomes and better social conditions. “Regenerative agriculture is the driving force,” he says.

Public procurement

Public procurement is another area identified by several interviewees as having significant potential for building a market for food and drink produced in regenerative systems. The UK Government recently updated its Social Value Model through which public sector buyers are required to give a minimum 10% weighting in contract decisions to social and environmental benefits. Prospective suppliers are now expected to be able to demonstrate measurable and time-bound commitments to achieving a range of sustainable procurement practices, including lower carbon emissions. The Labour government has also restated its commitment to a manifesto pledge that 50% of public sector food in England will need to be sourced locally or produced to high environmental standards.

An update to government buying standards for food in England is expected soon. In the meantime, devolved governments across the UK are already demonstrating the power of public procurement to increase the supply of regenerative products and provide a stable market for farmers. The Welsh Veg in Schools project is a cross-sector initiative to introduce more organically produced Welsh vegetables into primary school



meals across Wales. Co-ordinated by Food Sense Wales and funded by the Welsh Government’s ‘Backing local firms fund’, the project is working across six local authorities to help deliver the government’s commitment that every primary school-aged child is offered a free school meal and that the ingredients come from local suppliers wherever possible.

Speaking at Groundswell 2025, Katie Palmer from Food Sense Wales said a key aim of the project

is to spread the risk of investing in nature-friendly farming across the entire network of stakeholders who benefit from increased access to sustainable, nutritious food. “All of that risk and investment [currently] sits with the grower and that’s not fair,” said Palmer. “We’re [saying we’re] going to give you a secure market and we’re going to plug the gap between the cost of the veg that’s coming through conventional supply chains at the moment and locally grown veg.”



CHAPTER 3

The Consumer

Public understanding of the term regenerative remains low but there is a growing desire to support farming systems that tread lightly on the planet.

In order to grow market demand for regeneratively grown products businesses will need to communicate their value to consumers. That's a challenge when the term regenerative is neither well understood nor governed by an agreed standard. Brands seeking to communicate their support for regenerative farming will need to be transparent in showing how adopting these methods benefits the environment or risk breeding public cynicism and facing charges of greenwashing.

There is little evidence to-date that regenerative is a term that resonates strongly with consumers and positively impacts their shopping habits. A questionnaire conducted by AHDB and YouGov in May 2021, found that only 14% of British consumers had heard of regenerative agriculture at all¹⁹.

Since then, brands like Wildfarmed have built a loyal following and widened their distribution, exposing more consumers to the concept of regenerative agriculture. This was reflected in a more recent 2024 pan-European study by EIT Food which found that most consumers now know or can guess what regenerative farming is, but still find it difficult to distinguish it from organic farming²⁰.

More worrying still, anecdotal evidence suggests some consumers associate regenerative with artificial or lab-grown food. Tom Barton, co-founder of Honest Burgers, told the Footprint forum on regenerative agriculture that its consumers "had quite a negative reaction" to the term regenerative which many thought meant "some kind of factory-based meat process".

"Regenerative is great as an industry term for building people's understanding, but from a consumer point of view I think we need to stay away from it."

James Evans, co-founder, Grassroots Farming

Mixed views

Confusion around the term goes some way to explaining why many of those dedicated to growing the regenerative movement are nervous about using the term in direct consumer communications. "I don't think the term regenerative is consumer facing," says Evans from Grassroots Farming. "It's great as an

industry term for building people's understanding [of ecological farming systems], but from a consumer point of view I think we need to stay away from it."

Meldrum from Hodmedod's has adopted a similar position. "I don't think [regenerative] has particular meaning," he told the audience at Groundswell 2025. "We see it on the farm and we know what it is and we can recognise it, but it's really hard to capture that in a sentence and to put it anywhere [publicly], because it means different things in different contexts."

Some businesses are more positive about the value in using the word regenerative in consumer marketing. Northern Pasta, a UK brand launched during the Covid-19 pandemic, promotes on its packaging that the pasta is "crafted consciously using regeneratively grown spelt". Asked at Groundswell 2025 whether consumers know what regenerative means, co-founder Imogen Royall said: "I don't think they do but I don't necessarily think that's a bad thing. [...] I think they need to have a sense that it's positive and it's doing good [but] they don't really need to know the nitty gritty of it."

Mainstream brands are also starting to use the term publicly. ASK Italian menus now contain

“Because there is no one definition [...] for something to be considered regenerative, it’s very difficult to know where your claim might lie.”

Dominic Watkins, partner, DWF.

a box explaining how the pizza is made with 100% regenerative Wildfarmed flour “helping British farmers bring life back to fields across the UK”.

McCain is another early adopter of the language of regenerative in its marketing. A 2023 TV advert featured one of its pioneer regenerative farmers talking about her adoption of regenerative practices including low soil disturbance, crop rotations and planting of wildflowers around the margins. The advert ends by telling customers that they’re “supporting the move to regenerative farming” by eating McCain chips²¹.

Young from McCain says that while general awareness of regenerative agriculture remains relatively low, its research has shown that almost two thirds of Gen Z (63%) are interested in learning more about regenerative agricultural practices. “We believe that if we want more people to care about regenerative agriculture, we need to meet them where they are: in their kitchens, on their phones, and throughout their daily routines,” he says.

Businesses that aren’t directly consumer-facing also report demand from their customers – like restaurants, pubs and caterers – to learn more about regenerative

farming within their value chains so they can take that message to consumers. “We’ve got customers who want to join us on the journey right from the very beginning,” said Pembroke from Fresh Direct at the Footprint forum. “Their ask of us is to educate them and their teams, and then help them design simple messages that can help educate their consumers as well.”

Regulatory risk

Businesses talking up their support for regenerative farming know that in order to maintain brand integrity they will need to strike the balance between effective messaging and evidential rigour and producer compliance.



The stakes have become higher since April 7th 2025 when the Digital Markets, Competition and Consumers Act 2024 (DMCCA) came into force, giving the Competition and Markets Authority (CMA) the ability to fine businesses up to 10% of their global turnover for giving false or misleading information to consumers, including about their green credentials²⁶.

Dominic Watkins, global head of consumer sector and partner at law firm DWF, believes the lack of an agreed standard for regenerative food and drink is a problem for businesses looking to stay on the right side of the rules. “I think we can all agree that the principles behind regenerative agriculture are positive for the environment and other things we wish to encourage, but because there is no one definition or defined principle that needs to be met in order for something to be considered regenerative, it’s very difficult to know where your claim might lie.”

It’s not yet clear how the CMA intends to assess the use of regenerative as a descriptor, meaning businesses already using it in their marketing are taking a risk. Watkins’ general advice is to be cautious when using vague words, or words which are frequently

CASE STUDY: Certification provides clarity behind claims

In recognition that regenerative farming lacks a firm definitional base, private certification schemes have been developed to give buyers the confidence that products are delivering the benefits to nature and society producers claim.

In the US, pioneers of regenerative agriculture including Gabe Brown have created the ‘Regenified’ standard which verifies practices and outcomes focused on improving soil and ecosystem health²².

In the UK, the ‘A Greener World’ scheme covers all aspects of regenerative farming including animal and human welfare²³.

Leading regenerative suppliers like Wildfarmed and Grassroots Farming have opted to develop their own bespoke standards against which farmers within their supply chains are third party audited. Wildfarmed’s outcomes framework for nature, water, carbon, and farm profitability is currently being tested in a pilot overseen by the National Institute of Agricultural Botany. “Outcome measurements are crucial to us because it builds confidence in the impact of regenerative systems,” says Wildfarmed’s chief sustainability officer, Rob Bray.

Nestlé has developed an Agriculture Framework which sets out its vision for regenerative agriculture including practice and result-based KPIs²⁴.

McCain is also ploughing its own furrow having developed the McCain Regenerative Agriculture Framework, which aims to provide both clear measures of progress while recognising the importance of farmer flexibility²⁵. The framework consists of four levels starting with ‘onboarding’ and culminating’ in ‘leading’ via ‘engaged’ and ‘advanced’. The business is working towards having 100% of its global potato acreage at the onboarding level and at least 50% at the engaged level or above by 2030.

The lack of consistency between private standards remains an issue, albeit there are fears that a single, universal certification or standard could limit the scalability of the regenerative movement if it is overly prescriptive.

There is also nervousness it could create another schism between regenerative and organic farming, which itself is governed by a legal framework. Speaking at this year’s Groundswell, Patrick Holden suggested the answer lies in agreeing a common framework for measuring the social and environmental impact of farms that could then be communicated as a single sustainability score on a label or menu. “I think finance would then come from people who have an interest in supporting this change,” Holden said.

misinterpreted by consumers like regenerative (biodegradable and eco-friendly are other examples of the genre). Businesses may be safer making specific claims that can be clearly evidenced by honing in on

particular practices associated with regenerative farming, such as the exclusion of pesticides or adoption of no-till farming. “The more specific the claim is, the easier it is to demonstrate,” says Watkins.

Health holds the key

Notwithstanding the regulatory risk, as more businesses talk about regenerative farming in their consumer communications the more the sector as a whole will learn

“Where consumer demand grows, the industry will respond, and in this case, nature is ultimately the one set to win big.”

Rob Bray, chief sustainability officer, Wildfarmed

what is motivating people to choose products farmed regeneratively. Most public discussion of regenerative agriculture currently centres on the environmental benefits, however the EIT Food study suggested the nutritional value of food produced in regenerative systems is likely to resonate more strongly with the public. It found health and taste are the two most important attributes that lead to the perception that regenerative agriculture produces high quality food, a perception that is then enhanced through the perceived benefits for the environment and animal welfare.

It has long been believed within the regenerative farming community that food grown in regenerative systems is higher in micronutrients than that grown conventionally. Evidence is yet to conclusively prove this theory, although small-scale field tests are showing promising results. Holden, for example, shared at Groundswell 2025 that Castell Howell has carried out an analysis of his carrots that showed a greater nutrient density versus those grown in a high-input system.

At the Footprint forum, Emma Keller, head of sustainability at Nestlé UK & Ireland, spoke positively about the opportunity for businesses to develop ‘good for

you, good for the planet’ narratives around food grown in regenerative systems should evidence conclusively show that healthier soils produce more nutritious crops.

Price premium

One of the biggest barriers to growing consumer demand for regenerative food will be its price tag versus conventionally grown alternatives. A 450g bag of Northern Pasta costs £4.95 on Ocado, a more than 500% premium over the retailer’s own brand alternative. This is perhaps an extreme example of the price differential but it speaks to the challenge businesses will face in pricing regenerative products at a level that is affordable and competitive, while absorbing potentially higher supply chain costs and ensuring producers are fairly rewarded for investing in the transition from conventional farming.

“That’s been our biggest challenge,” says Evans, which pays Grassroots farmers a premium over the market rate for beef. “Obviously, [commodity] beef is trading at a premium now and so we’re asking [customers] to pay a premium on top of a premium” – a big ask, he suggests, given the current cost pressures facing the hospitality sector.

Grassroots has designed an alternative option for businesses who want to support regenerative beef farming but aren’t able to go direct to source like Wahaca due to the premium price and logistics. Businesses will be given the option to pay money into a new impact fund that will be invested in growing the land farmed regeneratively thus helping build economies of scale and making regenerative beef more accessible over time.

Value equation

Evans also feels there is a need to rethink how the added value derived from regenerative farming in areas like biodiversity, soil health and climate resilience is accounted for within value chains. “In the current model, all that cost just goes on the product and that is probably the biggest barrier of all [to scale],” he says.

As we explored in *Chapter One*, examples are emerging of how the value from ecosystem services and emissions reduction is increasingly being monetised through private finance – water companies making payments to Wildfarmed growers, for example, or farmers being paid for carbon reduction via Exchange Market.

Should evidence continue to suggest regenerative farming can be

more profitable than conventional farming once initial capital investments have been paid for and new skills learned and honed, then over time the economics may begin to stack up more favourably for regenerative versus conventional agriculture.

“We believe farmers will get to the stage where their books will be better, they will start getting better profits, their skills will be able to sustain and it becomes normal farming this way,” says Naheed at Nestlé.

Many companies, moreover, say they are not motivated by the opportunity to command a premium for regeneratively grown food and drink but by the need to create resilient supply chains that go some way towards insulating businesses from the ever-growing threat from climate change.

Naheed explains how companies sourcing mainstream commodities, like milk, at scale and using them to make everyday products are not currently in a position to pass on the cost associated with adopting regenerative principles. “But what we do know is this is a good thing to do,” she says. “We know this is going to help us in future because of the range of benefits it delivers. This is more about protecting the environment, improving nature,

building the social resilience of our supply chains and allowing farmers to plan for the long-term.”

As for consumers’ own agency to effect change, Bray at Wildfarmed believes the more people who recognise their power in using their food choices to support and restore nature, the easier it will become to

accelerate the world’s transition to regenerative agriculture. “It’s not a change that will happen overnight; there is still a long road ahead,” he says. “However, where consumer demand grows, the industry will respond, and in this case, nature is ultimately the one set to win big.”

Five takeaways for scaling regenerative agriculture

- 1. Align on practices and outcomes.**
Regenerative agriculture exists across a broad spectrum however there is growing consensus over the practices it entails, the outcomes it should deliver and how to measure these in a consistent, cost-effective way. Efforts to align these must continue.
- 2. Help fund the transition.**
Farmers still take on the majority of the financial risk in adopting regenerative practices. Businesses must work individually and in partnership to give farmers the confidence to commit to a long-term transition.
- 3. Contribute to system-wide change.**
Scaling regenerative agriculture relies on sustained commitment from across the food system. Businesses operating within the foodservice and hospitality sector and its supply chains have a key role to play in providing a consistent market for regenerative food and drink.
- 4. Gain buy-in from across the business.**
Scaling support for regenerative agriculture isn’t just the job of the sustainability team. Procurement, sales, marketing and other functions have a critical role to play in supporting the transition from conventional farming.
- 5. Back up words with actions.**
Consumer understanding of regenerative agriculture remains low. Businesses communicating their support for it will need to be transparent in showing how their commitment translates into tangible benefits for people and planet.

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About Footprint Intelligence

The ever-shifting sustainability debate makes it vital for businesses to have accurate intelligence to make informed decisions. Footprint Intelligence is Footprint Media Group’s research and analysis division, helping companies develop successful strategies in the context of responsible business practices. Footprint Intelligence aims to drive, promote and share best practice by helping industry resolve pressing sustainability issues. It asks tough questions and finds answers. It uses research and industry insight to bring businesses together to identify solutions, opportunities, trends and challenges.



About Nestlé Professional

At Nestlé Professional®, hospitality is more than just a business. It is our business. This means inspiring the next generation of culinary talent through Nestlé Professional® Toque d’Or®; striving in the field in Nutrition, Health and Wellness; and collaborating with the industry for a more sustainable future. From coffee to cocoa, and from food waste to water, Nestlé works with farmers, chefs and operators continually to help make sustainable strides forward.



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- **James Young**, VP of Agriculture, McCain GB&I

Report team

Research and writing: **Nick Hughes**
Design: **Trevor Marshall**

