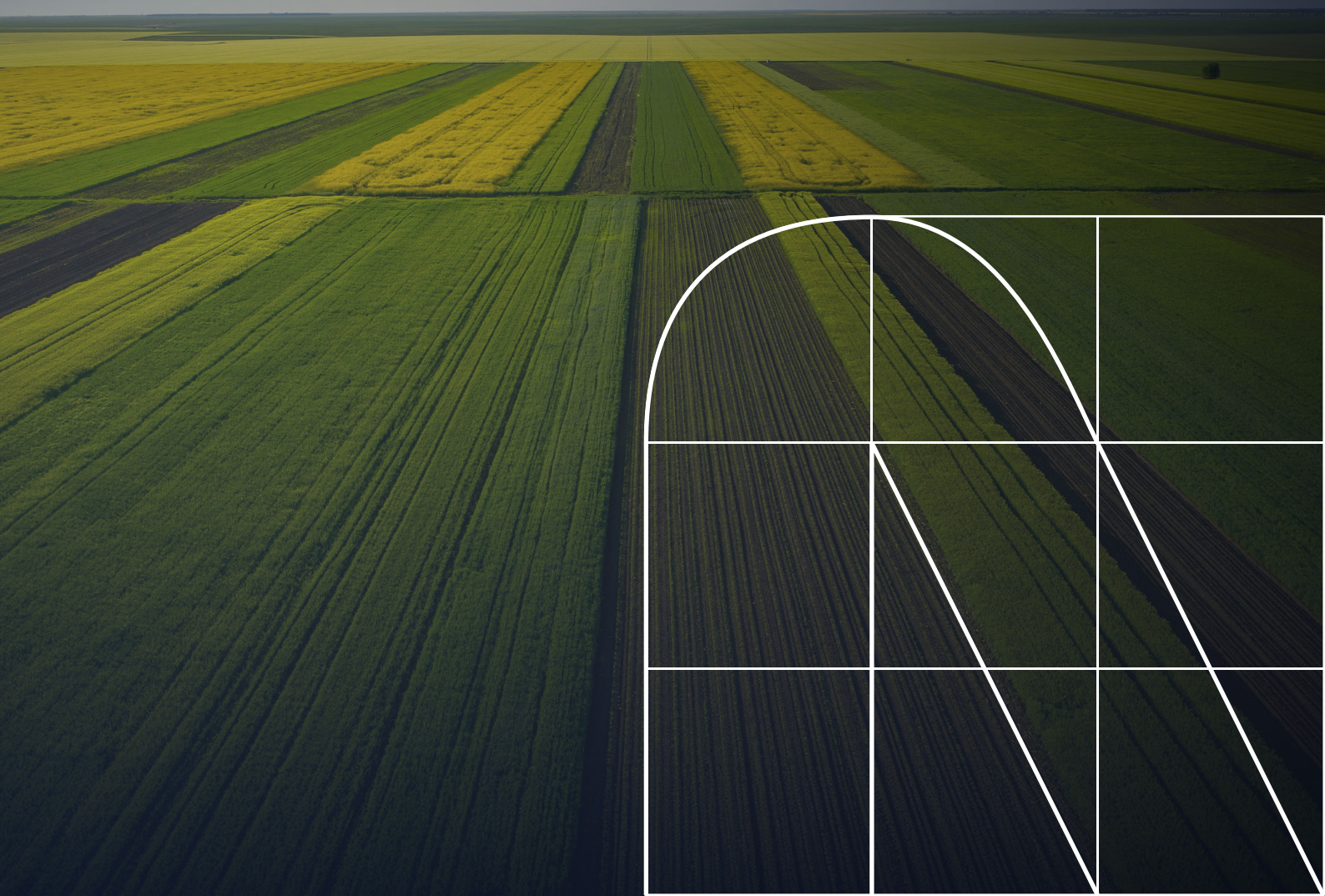
Shaping Regenerative Agriculture Programs through Farmers' Perspectives

A cross-country study on farmers' awareness, engagement, and perceptions of Regenerative Agriculture programs



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1. Foreword

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Unlocking the full potential of sustainable investment in agri-food requires a clear understanding of the most effective channels to drive impact. Among these, certification and reporting stand as critical pillars, ensuring transparency, accountability, and trust. Yet, for farmers, these processes often represent the greatest barrier to participation, burdened by complexity and cost. This paradox threatens to exclude those most vital to the transformation of agri-food systems.

Technology emerges as a powerful enabler, capable of bridging this gap. By making compliance easier, reducing operational costs, and enhancing data accuracy, digital tools can empower farmers to engage meaningfully in sustainability initiatives. When leveraged thoughtfully, technology not only simplifies certification but also amplifies the real-world impact of investments, bringing measurable change to the field. Identifying and scaling these solutions is not just a strategic imperative; it is a moral one, essential to building resilient agri-food systems that serve both people and planet.

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The path to sustainability is complex, involving every sector and stakeholder. While the ESG world is under pressure — with 55% of Ipsos ESG Council members reporting that some leaders are pulling back on their commitments — it also presents critical opportunities. As one CSO told us, "If your business does not contribute to sustainability, you have a short-term business. It will die long term." This applies across industries, from agriculture to manufacturing to services. The challenge lies in balancing immediate business imperatives with long-term societal responsibilities. And evidence shows getting this right drives resilience and growth.

Our research in the agri-food sector reveals that mastering this equilibrium can unlock significant market potential and drive transformative change. Regenerative agriculture programs, for instance, can address farmers' economic challenges while meeting consumers' sustainability expectations. However, these programs must be designed to truly support farmers' needs, offering appropriate incentives and reducing administrative burdens.

At Ipsos we believe all actors should recognize social complexity and position sustainability as a co-benefit. Sustainability initiatives should be pertinent, authentic, credible, effective — and measurable. Ultimately, what matters is the tangible difference these efforts create: for business, people, and the planet.

2. Executive Summary

Regenerative Agriculture (Regen Ag) is gaining momentum across Europe as a strategic response to the environmental, economic, and regulatory pressures facing today's farmers (or growers). This study, conducted by NTT DATA in collaboration with Ipsos-bva, surveyed 214 farmers across France, Spain, Poland, and Romania to understand Regen Ag programs' awareness, engagement, and perception. Findings reveal that while regenerative practices are gaining traction, significant gaps remain between farmers' needs and current program offerings.

Key findings

- Adoption is growing, with **50% of growers already implementing regenerative practices**, though awareness and participation vary widely by country and farm profile.
- By combining increased acreage enrollment with biodiversity integration, the Regen Ag market in EU could grow from €50 million to €1.1 billion by 2030—leveraging a 50% adoption potential across 62 million hectares, **an area twice the size of Poland.**
- Untapped potential persists among **independent adopters and non-participants**, especially in under-supported practices like biodiversity enhancement and agroforestry that are only deployed by 25% of respondents.
- **Economic incentives are critical**, with 79% of farmers prioritizing premium crop prices and 76% value input cost savings, yet these are underrepresented in current program offerings (19% and 39%, respectively).
- **Administrative burdens**, particularly around reporting and verification, are major barriers to participation (6.3 effort points out of 10), despite the relative ease of applying regenerative practices (5.9 out of 10).
- There is a clear **gap between required and adopted Regen Ag practices.** While crop rotation shows the smallest discrepancy (63% implementation vs. 69% requirement), being the most popular practice among participants, cover cropping has the largest (45% vs. 83%) one.

The study underscores the need for Regen Ag initiatives to be more farmer-centric, economically viable, and operationally streamlined to accelerate the transition to Regen Ag and maximize its potential impact in the agricultural value chain.

3. Introduction

Regen Ag programs are gaining traction across Europe, but their success hinges on how effectively they meet farmers' needs, incentivize their engagement, and support their transition to Regen Ag.

Imagine a business facing the urgent need for transformation—revenues are falling, supply chain partners are gaining leverage, and external pressures such as regulatory shifts and economic volatility are escalating. This scenario, while common in the corporate world, mirrors the reality faced by farmers today.

Globally, food systems are responsible for an one third of greenhouse gas emissions, with EU agriculture aiming to reduce its share by 55% by 2030, placing increasing pressure on farmers to utilize more sustainable production methods (EASAC, 2022). Meanwhile, the degradation of natural ecosystems accelerates: **every second, the world loses the equivalent of 4 football fields of healthy soil, putting 95% of global soils at risk of degradation by 2050 if current practices persist** (Save Soils, 2024). In Europe alone, this leads to **economic losses of around 1.25 billion euros annually** (FoodDrink Europe, 2023). As climate impacts intensify, farmers are increasingly expected to adapt their practices, meeting evolving environmental standards while managing pressure on profit margins.

In this context, Regen Ag emerges as a compelling solution. Regen Ag is a holistic approach **that prioritizes soil health, biodiversity, and ecosystem balance, offering a pathway to both environmental restoration and economic resilience.** However, the transition is far from simple. Farmers are being pushed to rethink the traditional methods they have relied on for generations, incorporate new technologies, and take on major financial risks in the process.

To support this transition, dedicated Regen Ag programs are beginning to take shape. These initiatives aim to provide growers with the tools, knowledge, and financial incentives needed to adopt regenerative practices [Annex 5.1]. While promising, these initiatives operate in a rapidly evolving market, leading to wide variation in their design, scope, and effectiveness.

These programs are led by various stakeholders— Food Value Chain (VC) players, Startups, and NGOs—each using different models. According to NTT DATA's internal research of over 1,000 organizations, the design of programs is closely tied to the type of organization leading them. While Food VC players often reward specific practices, Startups mainly focus on measurable environmental outcomes like carbon reduction, and NGOs tend to support sustainable initiatives aimed at achieving long-term environmental goals. Despite differences, most programs share certain features, such as offering outcome-based rewards, reducing adoption barriers, providing technical support, and using advanced technologies such as Monitoring, Reporting, and Verification (MRV) systems[1]. Some may incorporate other benefits or features, though the addition and extent of these factors vary across them. Understanding these differences is essential to developing scalable, context-specific solutions that resonate with farmers.

This study aims to understand how programs can better support farmers' transition to Regen Ag. Conducted in collaboration with Ipsos-bva, the research involved direct engagement with farmers in Romania, France, Poland, and Spain to explore their challenges, expectations, and preferences. The goal is to **identify what makes programs effective from the farmers' perspective and how they can be improved to accelerate the transition to Regen Ag across Europe.**

[1]**Monitoring, Reporting, and Verification (MRV) systems** are tools used to track, document, and validate environmental outcomes to ensure transparency and accountability. In Regen Ag programs, they help measure impacts like soil health, carbon sequestration, and biodiversity.

4. Farmer's Voice – Study Overview

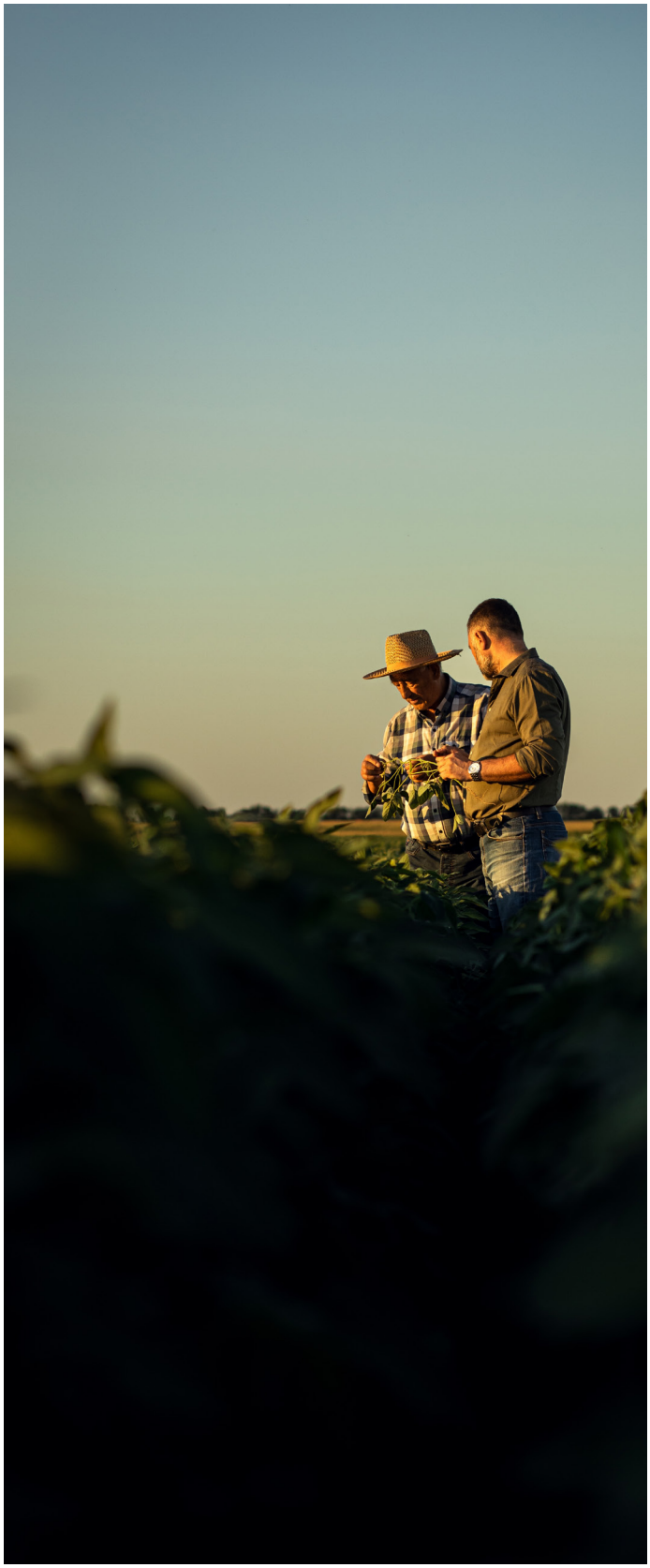
This study, conducted in partnership with Ipsos-bva, surveyed 214 farmers across France, Spain, Poland, and Romania to evaluate awareness, participation, and perceptions of Regen Ag programs. Using an online survey, farmers were selected to ensure regional and operational diversity. The questionnaire combined farm profile data with targeted questions on Regen Ag engagement, incentive preferences, and program awareness. Insights were further enriched by NTT DATA's proprietary research on over 1,000 organizations, providing a comprehensive view of program maturity and best practices across Europe.

4.1. Awareness and Participation

> "Regen Ag is becoming an increasingly widespread concept, but awareness and engagement vary—highlighting the need for tailored program design.

The data reveals that Regen Ag is no longer a niche concept; **around 30% of respondents have already participated in Regen Ag programs, and 50% are applying regenerative practices such as crop rotation, cover cropping, and reduced tillage.** This marks a shift towards mainstream uptake. However, practices like biodiversity enhancement remain underutilized despite strong future interest, indicating untapped market potential.

Awareness of Regen Ag initiatives varies notably by country, based on the recognition of specific programs presented to them [Annex 5.2]. For example, 50% of French, 44% of Polish and 40% of Romanian farmers identified at least one program, while awareness was lower in Spain (24%). Participation rates vary from 16% to 30% with France showing the highest rate, followed by Poland, Spain, and Romania. Larger and more experienced farmers, especially those managing over 100 hectares and aged 55 or older, are more likely to participate. Crop type also influences engagement, with wheat, oilseed rape, and barley producers showing the highest involvement.



4.2. Addressing Value Chain Specificities for Greater Impact

> **Maximizing program impact requires aligning incentives with crop-specific adoption patterns, taking into account diverse producer types and commitment patterns.**

Participants actively engaged in Regen Ag programs tend to report higher rates of practice implementation. Although practice utilization levels remain relatively consistent across crop types, participation rates vary. Producers growing wheat, barley, oilseed rape, and forage crops (such as alfalfa, fodder, and permanent grassland) are more frequently involved, with around 30% participation, possibly because program structures and incentives align better with these crops. Conversely, fruit and vegetable producers show lower participation rates—19% for fruit growers and 25% for vegetable growers—and often manage smaller farms. Yet, despite lower participation, those who join demonstrate stronger commitment, with 45% of vegetable producers and 61% of fruit producers enrolling over 70% of their acreage, compared to a 30% average.

From a program design perspective, **addressing producer-specific needs, as well as differences in value generation and farm size could strategically increase participation and acreage enrollment, thereby reducing program acquisition costs.** While extensive crops may naturally align better with current value propositions, targeted incentive and benefit strategies for producers with high engagement potential—such as fruit and vegetable producers—can significantly improve overall program cost-efficiency and broaden impact.

4.3. Regen Ag Market Size and Growth Potential

> **Regen Ag market holds strong growth potential that can be unlocked by combining broader farmer participation with improved program outcomes.**

These adoption dynamics set the stage for understanding the full market potential of Regen Ag across Europe. Approximately 13% of the total surveyed farmland – around 4,100 hectares – has already been enrolled in Regen Ag programs across the four countries. Poland leads with over 30% of the overall respondents' utilized land involved, followed by Romania (16%), France (13%), and Spain (8%).

Regarding potential adoption, around 30% of farmers in **Romania, Spain,** and **France** are willing to enroll 90% or more of their land in **Regen Ag programs.** On average, if they were to participate, Spain and Romania show the highest potential commitment, with 45% of their farmland expected to be involved, followed by France (39%) and Poland (32%). Applied to the total land owned by survey participants, this equates to over 13,200 hectares of potential Regen Ag farmland just among study participants.

At the EU level, applying a 50% adoption potential to the examined crops equates to up to 62 million hectares—**roughly 86 million football fields or twice the size of Poland.** (Eurostat, 2024) [Annex 5.3, 5.4]. Yet, the current market captures only a fraction of this potential. With around 12 million hectares enrolled in Regen Ag programs, the EU market generates about €50 million annually.

To unlock the full market potential—estimated at up to €1.1 billion by 2030—two complementary approaches are proposed:

- **Qualitative Approach:** Improve the quality and impact of participation.
- **Quantitative Approach:** Expand the total acreage enrolled in Regen Ag practices.

Qualitative Approach

The qualitative growth dimension focuses on enhancing the **outcomes of participation**, especially by improving the **integrity of carbon credits.** In this approach, **biodiversity-enhancing practices** play a central role in improving the qualitative dimension of Regen Ag market growth, which can be integrated in two ways:

1. Credit Quality

By strengthening carbon credit quality that are valued at a premium for projects that prioritize biodiversity—where measurable outcomes improve credibility and co-benefits (World Economic Forum, 2023).

2. Biodiversity Markets

Through participation in emerging biodiversity credit markets, though their scalability remains uncertain (Directorate-General for Environment, 2025).

Embedding biodiversity within existing carbon markets offers a more immediate and scalable path. Nearly half of farmers express interest in such practices, while only 25% currently adopt them. As shown in Figure 1, expanding biodiversity adoption could raise market value to **€1.1 billion by 2030**, compared to **€750 million if adoption remains flat** [Annex 5.5]—a **1.5x uplift** driven by improved credit quality linked to farm-level biodiversity outcomes.

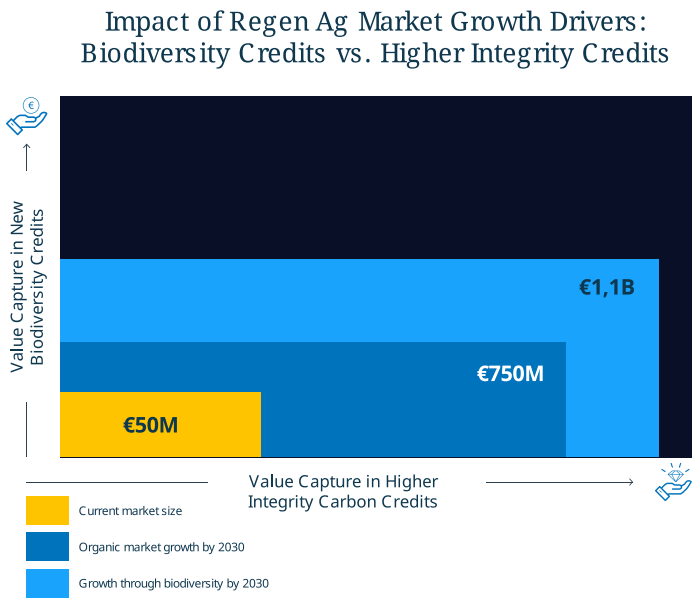


Figure 1: Impact of Regen Ag Market Growth Drivers: Biodiversity Credits vs. Higher Integrity Credits

Quantitative Approach

Scaling Regen Ag adoption requires increasing the total land enrolled. A key strategy is to engage two underutilized grower segments:

1. **Farmers already practicing Regen Ag informally:** Represented by the yellow line in Figure 2, these farmers are aligned with regenerative goals but are not yet part of formal programs. They offer a near-term opportunity for expansion through tailored engagement and financial incentives.
2. **Farmers not yet practicing Regen Ag:** These represent a longer-term opportunity. Reaching them will require awareness-building, advisory services, technical support, and access to enabling technologies.

Survey findings reveal **two main barriers** to scaling:

- A mismatch between the incentives farmers value and those currently offered by programs.
- Challenges farmers face when joining Regen Ag programs, with support measures provided by programs often misaligned to the effort required.

Addressing these gaps and aligning program design with farmers' realities will be essential to accelerate enrollment and scale impact effectively.

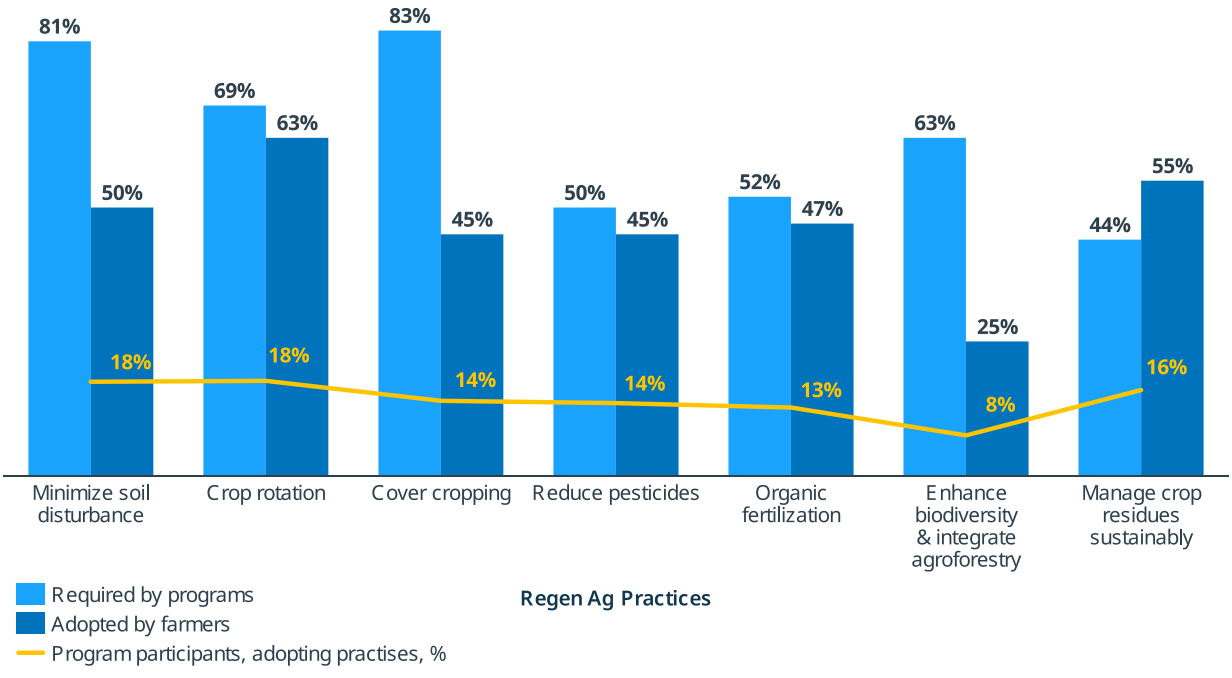


Figure 2: Comparing Program Practice Requirements with Farmer Adoption

4.4. Misalignment in Programs' Incentive Structures

> **Current Regen Ag programs do not sufficiently address farmers' economic priorities, limiting adoption potential.**

The analysis reveals a significant **misalignment between the incentives most valued by growers and those currently offered by Regen Ag programs.** While economic incentives are the strongest motivators, cited by 79% for premium crop prices and 76% for input cost savings, these are offered by only 19% and 39% of programs, respectively. In contrast, non-monetary benefits such as advisory services, technological support, and training are more commonly provided and valued by 62% of respondents.

Comparing Farmer Incentive Preferences with Program Offerings in Regen Ag

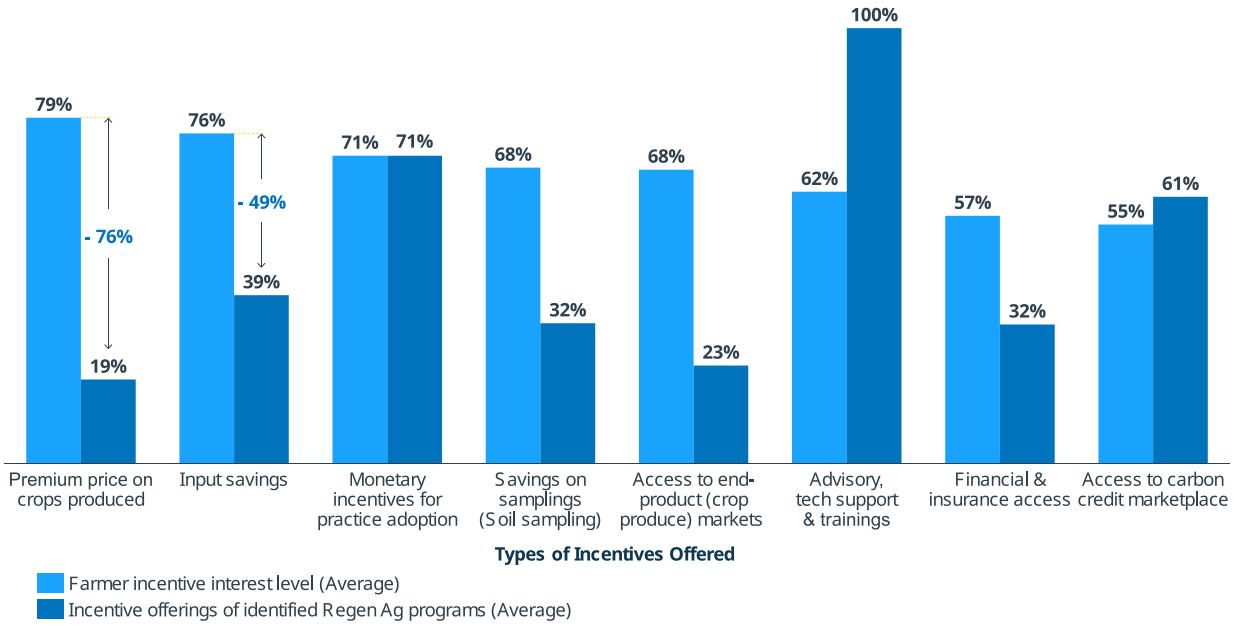


Figure 3: Comparing Farmer Incentive Preferences with Program Offerings in Regen Ag

Regional disparities further emphasize the need for localized initiative strategies to boost program penetration. For instance, Romanian growers exhibit a high preference for incentives (83%), which aligns with the fact that programs in Romania offer benefits at an above average rate (59%). Conversely, in France, programs offer only 41% of incentives, demanded by 60%, indicating a weaker alignment between supply and demand.

4.5. Bridging the Incentive Gap in Regen Ag

> **VC players must realign their programs' incentives with farmers' economic priorities to drive broader adoption of regenerative practices.**

A significant disparity exists between the incentive models offered by different stakeholders in Regen Ag. Startups, which are more widely recognized among participants (54%), tend to offer a more holistic range of incentives compared to VC players, who are less familiar (45%). For example, startups offer a broader range of incentives that align with farmers' preferences, surpassing Food VC players in five incentive categories—for example, monetary incentives for practice adoption (64% vs. 36%) and savings on sampling (83% vs. 17%). These incentives closely match farmers' priorities, with 71% valuing monetary incentives for adoption and 68% valuing sampling savings. This misalignment presents a **strategic opportunity for VC players to diversify and strengthen their program offerings by prioritizing other types of incentives** to be able to compete with startups. This could significantly drive engagement and accelerate the transition to regenerative practices across the agricultural value chain.

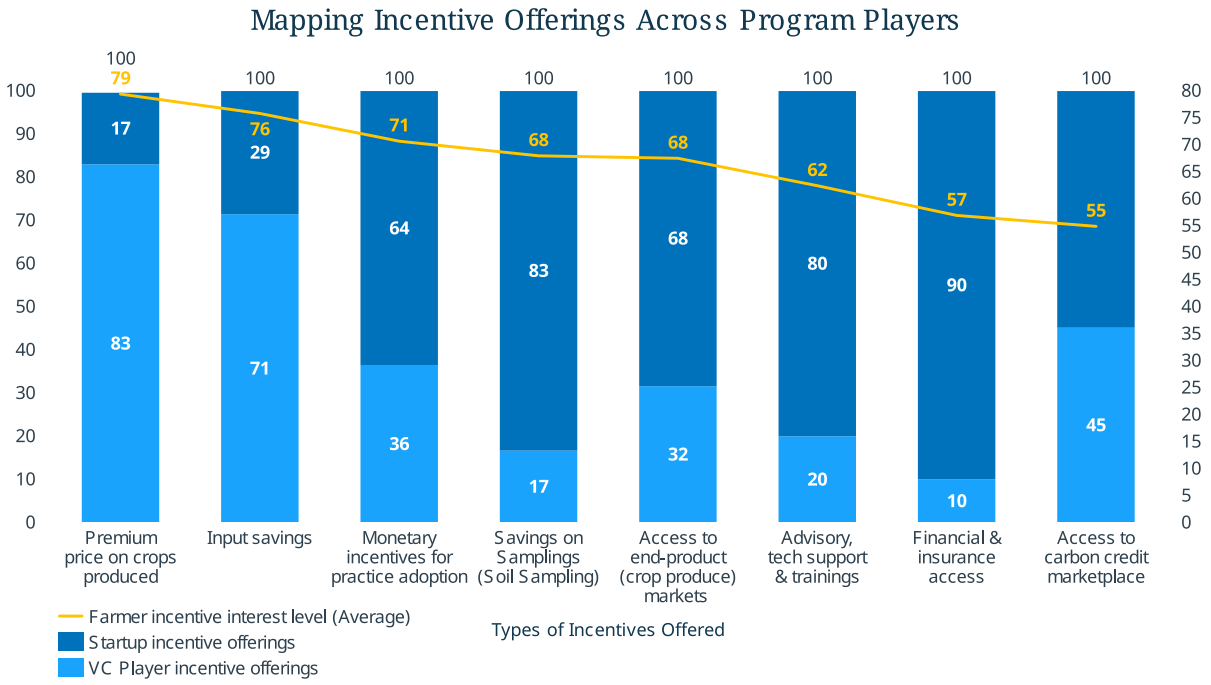


Figure 4: Mapping Incentive Offerings Across Program Players

4.6. Reducing Barriers to Scale Adoption

> **While practice incorporation is manageable, reporting and verification remain key challenges for growers.**

Effort levels in the implementation of Regen Ag program tasks vary more significantly across regions than across task types, highlighting potential gaps in localized support and program adaptability. Survey findings show that participants generally do not find the transition to Regen Ag practices highly demanding, with an average effort rating of 5.9 out of 10. However, tasks related to reporting, data collection, and outcome measurement are consistently rated as the most burdensome tasks of program participation. This suggests that the main barrier to broader adoption lies not in the practices themselves but in the administrative and technical requirements linked to compliance with program requirements.

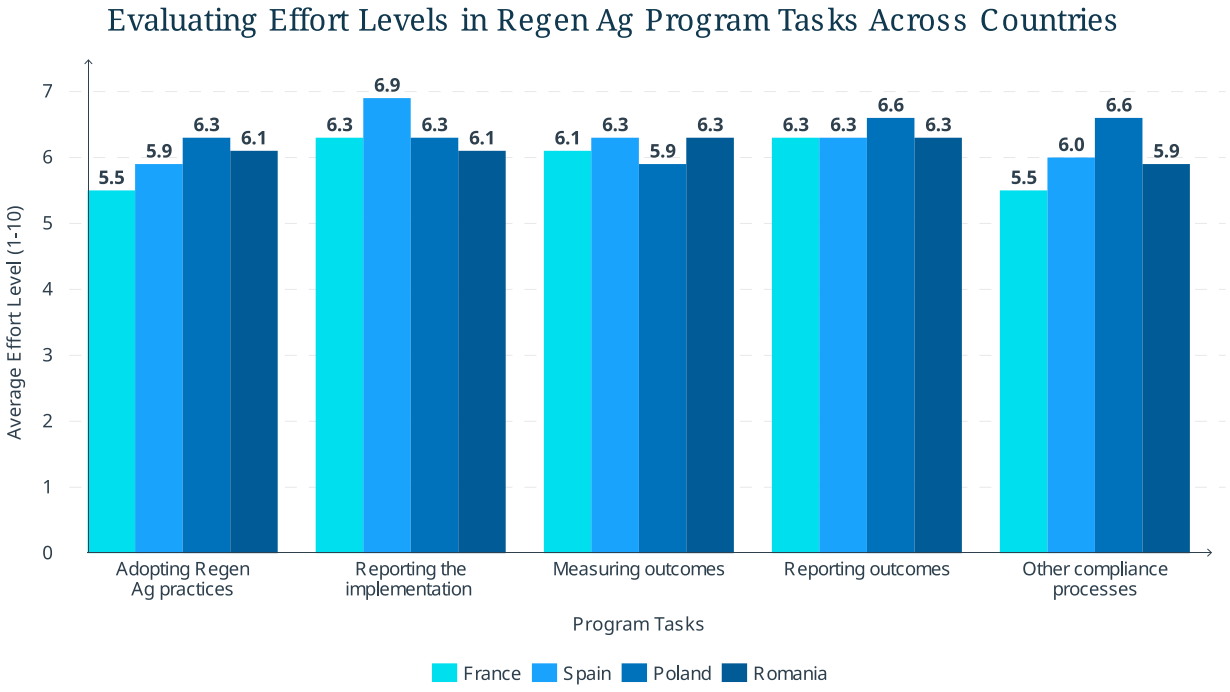


Figure 5: Evaluating Effort Levels in Regen Ag Program Tasks Across Countries

These findings are reinforced by a recent study on farmer protests across Europe, which found that over half of farmers surveyed seek simpler regulations and less bureaucracy—so they can focus on what truly matters: innovation and sustainability (Ipsos-bva & CropLife Europe, 2025).

This misalignment between initiative requirements and farmers' operational capabilities calls for a strategic shift towards simplifying data collection, reporting, and verification processes. Addressing these pain points is essential not only to boost participation but also to support the scalability and credibility of Regen Ag initiatives. **Digitally enabled, integrated solutions—such as MRV systems—streamline these administrative tasks could significantly improve both program efficiency, scalability, and environmental impact.**

5. Conclusions

The transition to Regen Ag is gaining momentum, yet its success depends on programs' ability to align with farmers' economic, operational, and regional needs. By tailoring initiatives to address these diverse requirements—through enhanced awareness, flexible incentives, and localized support—Regen Ag can unlock its transformative potential across Europe.

This research highlights key conclusions:

Regen Ag, with 50% of EU farmers ready to adopt across 62 million hectares—twice size of Poland—currently generates **€50 million annually from 12 million enrolled hectares.** The market could grow to €1.1 billion by 2030 by increasing acreage enrollment and enhancing participation quality through biodiversity integration.

Untapped growth opportunities lie in engaging independent practice adopters and non-participants through tailored incentives and support. To expand Regen Ag programs effectively, strategies must address practice gaps and adapt to regional needs, while ensuring relevance across varying levels of awareness and implementation.

Economic alignment is essential, as monetary incentives are the primary drivers of participation in Regen Ag programs. Yet, there is a clear mismatch between what farmers value and what most programs offer. To increase implementation and impact, programs must realign their offerings—especially by enhancing financial benefits—while tailoring strategies to regional preferences and needs.

Startups play a pivotal role in incentive model offerings, aligning more closely with farmers' economic priorities. Their familiarity and focus on valued incentives for practice adoption and savings on soil samplings make them more effective at driving engagement—highlighting a strategic opportunity for VC players to adapt and diversify their offerings to better meet farmer needs.

Administrative burdens—especially reporting and verification—are key barriers to participation. While the transitioning process to Regen Ag practices itself is not seen as overly demanding, simplifying compliance through digital tools and localized support is essential to improve scalability and adoption.

Regional differences matter: awareness, participation, and incentive alignment all demand flexible, localized approaches—not one-size-fits-all solutions. While economic incentives and streamlined administration are broadly important, tailoring programs to local contexts is essential for meaningful farmer engagement and long-term success.

To drive meaningful adoption of Regen Ag, programs must better align with farmers' priorities and needs to become more farmer-centric, economically aligned, and designed to accelerate the shift to Regen Ag across Europe. By working together to address these challenges, the full potential of Regen Ag could unlock a more resilient and sustainable future for all.

6. Annex

6.1. Key Elements of Regen Ag Program

Through an analysis of the core components of Regen Ag programs, the following key elements were identified:

Required practices

To qualify for benefits, growers must adopt required practices that vary by program, with payment methods or benefits differing accordingly to align with the program's goals. These practices include:

- **Cover Cropping:** Protects nutrients in arable land by planting cover crops, which prevent the loss of soil, nutrients, and agricultural inputs during vulnerable periods (Eu Legislation, 2021).
- **Minimize soil disturbance:** Practices like organic fertilization, minimizing soil disturbance, reducing pesticide use, and managing crop residues sustainably contribute to long-term soil health.
- **Crop Rotation:** Alternates crops seasonally on the same land, avoiding continuous cultivation of the same crop species, which enhances soil health and reduces pest pressure (Eu Legislation, 2024).
- **Biodiversity:** Strengthens farm resilience through the variability among living organisms within a given area (International Organisations, 2024).
- **Agroforestry:** Combines trees, crops, and/or livestock within a shared space, either spatially or sequentially, aiding in climate adaptation and mitigation, soil protection, biodiversity enhancement, and overall landscape improvement (Augère-Granier, 2020).

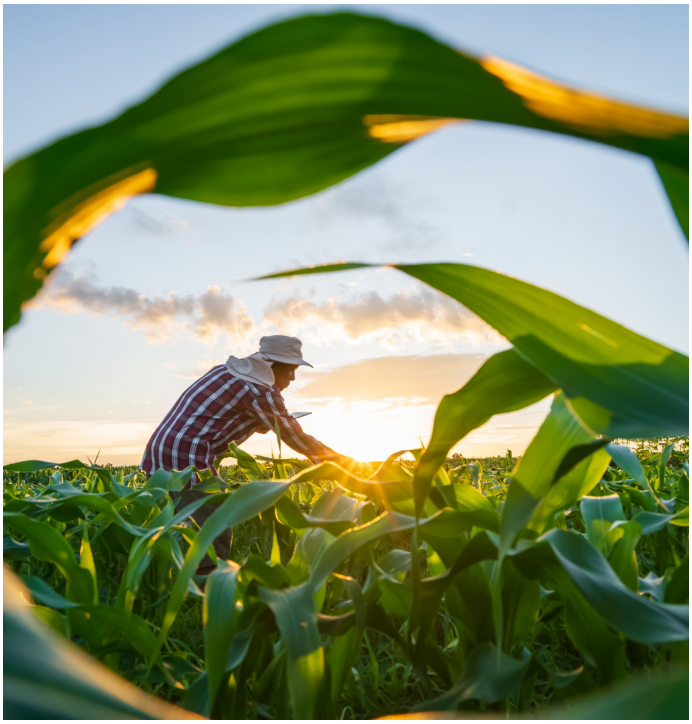
6.2. Regen Ag Program Awareness and Engagement

Regarding Regen Ag program awareness and engagement, respondents received a brief explanation of Regen Ag and its associated programs (e.g., grower programs offering incentives for practices like cover cropping or reduced tillage). Subsequent questions evaluated the awareness of Regen Ag concepts and programs, participation in such programs, and knowledge of major Regen Ag players (e.g. VC players or Startups identified in prior research). The organizations shown include Acciona, ADM, Agreena, Alcedo SRL, Avril Group (Expur), Azolla Projects, Barilla, Blacksoil, Carboneg, Cargill, CultivaCarbono, Danone, eAgronom, Gaiago, Heavy Finance, Invivo, Involtor, Klim, McCain Foods, Mondelez, Nestlé, Pascual & Iberdrola, ReGeneration, reNature, Repsol, Rize, Soil Capital, and Vivescia.

6.3. Market Size Calculation Details

The crops examined across the four selected countries include wheat, barley, grain corn, silage corn, soybean, oilseed rape, vegetables, fruit, and other crops, such as sunflower, alfalfa, grassland, and legumes. Data from 2024 on the crop production (in hectares) for each crop type in the European Union was sourced from Eurostat data base (Eurostat).

Based on data collected from study participants, we estimated the average proportion of acreage that could be potentially enrolled in Regen Ag programs for each crop. This proportion was then applied to the previously mentioned production data to calculate the total number of hectares that might be eligible for Regen Ag enrollment.



6.4. Market Value Calculation Details

To estimate market size value for Regen Ag programs, we leveraged NTT DATA's findings, derived from internal research of over 45 organizations within the industry. According to this research, programs can be categorized as either practice-based or outcome-based depending on how they incentivize farmers.

For practice-based programs, we considered the average entry fee paid by farmers intending to participate, and estimated the number of potential participants based on the average minimum land area required for enrollment. For the outcome-based programs, we calculated potential revenue by applying the average company sales fee to the average carbon credit price (share of price retained by companies). This was based on an estimate of the number of carbon credits that could be generated from the land already (€50M) and potentially (€260M) allocated to Regen Ag programs.

6.5. Market Growth through Biodiversity Calculation Details

To estimate market growth, we had to consider various scenarios. First, we calculated market growth by 2030 without any "enhancements" from biodiversity practices. To do so, we assumed a 28.4% growth rate for the outcome-based programs (average) and 14% growth rate for practice-based programs (reflecting average growth rate of the Regen Ag sector). Then, we estimated market growth that could be achieved by increasing the quality of carbon credits through the enhanced adoption of biodiversity practices (higher quality credits are considered a major driver of growth, and in our case, were modeled with a 31%, representing 90% of the maximum growth rate projected for the market overall) and by participating in a currently developing biodiversity credits market. Together, these measures could lead to up to a market value of up to €1.1B by 2030.

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