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# Unlocking Demand for Regenerative

## A Crowdsourced Blueprint for Accelerating Consumer Demand for Regenerative Agriculture

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**SMOKETOWN**

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# A Call for Collaboration

This white paper is built on a simple premise: Regenerative agriculture is the most important movement in the food industry, with unparalleled potential to transform the food system, and yet its success depends on our capacity for collaboration.

In that spirit, my team and I at Smoketown created this white paper as an explicit effort to foster collaboration as the regen movement tackles one of its biggest challenges: getting millions of consumers to understand and purchase regenerative products at scale.

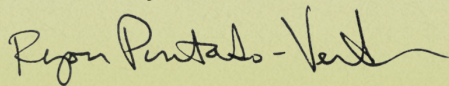
Rather than representing Smoketown's point of view on what it takes to accelerate consumer demand, this white paper is an attempt to reflect the collective wisdom that we gathered from interviewing over 20 brilliant executives across the consumer-facing regen landscape in the U.S. We've done our best to crowdsource their lessons, best practices and challenges as they've tried to drive consumer demand for regenerative agriculture. However, as with any crowdsourced body of knowledge, it will shift across time as the crowd grows and learns. Therefore, this white paper is necessarily a beginning, not an ending.

We publish this paper at a time when collaboration is both vital and seemingly difficult to achieve. From our conversations, it became clear that there are still deep divisions in the regen movement, grounded in sincere passion, philosophical disagreements and divergent cultural truths – and also competing business interests and emerging scientific consensus.

The question before the regen movement: Can we collaborate in a way that maximizes what regenerative agriculture can do for people and the planet?

In writing this white paper, I am manifesting an answer: yes.

In solidarity,



Ryan Pintado-Vertner  
Founder & CEO, Smoketown

# The Pollinator Methodology

**From April to July 2024, Smoketown spoke with over 20 executives from 18 food and beverage brands and other companies in the regen ecosystem.**

They represented a diverse array of marketers, storytellers, visionaries and general managers, all of them directly engaged in driving consumer demand for regenerative agriculture. They also represent a range of approaches to certification – from Regenerative Organic Certified to multiple certifications to no certification at all. (Find a complete list of executives interviewed in the Acknowledgements section.)

We asked each interviewee the same series of questions to get their perspectives on what is



required to maximize and accelerate consumer demand for regenerative agriculture in the United States. In addition, we immersed ourselves in podcasts and white papers from Nutrient Density Alliance, Non-GMO Project, ReGen Brands, John Kempf, Koen van Seijen and others, plus Alpha Food Labs’ market scan (Sept 2020) and consumer study (October 2021).

Rather than simply reflecting our own team’s point of view at Smoketown, this white paper attempts to synthesize what we heard across those interviews. We are, in effect, a pollinator, carrying wisdom and ideas from one end of the movement to the other. We gathered knowledge from a range of actors in the ecosystem. We centralized and processed what we collected, turning it into a document that, we hope, is nutrient rich because of its diverse sourcing.<sup>1</sup> Now, by publishing this white paper, we are redistributing what we learned in a format that can nourish the rest of the movement.

Two important things to note.

First, though the interviewees were exclusively from human food and beverage categories, we believe that the insights gathered are highly relevant to pet care categories, which are being shaped by similar consumer attitudes and beliefs. We also suspect that there are lessons applicable to the textile industry.

Second, it’s important to emphasize that this report is a synthesis of common themes. Therefore, it does not reflect the individual point of view of every interviewee. In fact, we already know that some interviewees disagree with elements of our conclusions – and that’s fine. Nonetheless, Smoketown believes this is a sincere reflection of the consensus view.



Regenerative farmers in Peru. Source: SIMPLi.

1. We address a caveat to this diversity in the Learning From Biodiversity section.

# Learning From Biodiversity: A Limitation

**Without biodiversity, it is impossible to fully regenerate soil. Similarly, without enough diversity among the interviewees, this white paper has real limitations.**

We acknowledge that none of the interviewees were Black and/or Indigenous, and not enough were broadly BIPOC. Our conclusions no doubt suffer as a result. Though Smoketown itself is a Black-owned, Black-led and diverse company, our diversity cannot compensate for the lack of diversity among the interviewees. That's simply not how it works. We own that.

And yet we published this white paper nonetheless. Why?

Our hope is that the vibrant regen movement will recognize and correct the report's shortcomings, much in the way that a plant's microbiome can recognize and redress weaknesses in neighboring plants.<sup>2</sup>

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2. "Healthy Soil's Impact on Carbon Pathways & Microbial Diversity," Webinar, Dr. Christine Jones, Oct 21, 2021, <https://youtu.be/S7mrgShYCvQ?si=MZjjnrTAinDZ8ZuU>.

# Theories of Change: The Role of Consumer Demand in Scaling Regenerative Agriculture

**Every interviewee agreed that scaling regenerative agriculture is a critical priority for the next decade, given its potential impact on climate, farmer livelihoods and human health.**

However, the role of the consumer is up for debate. How important is consumer demand for scaling regen in the U.S.?

We created four distinct theories of change to summarize the divergent views that we heard and to define the contours of this debate.

## **The Farmer-Led Theory**

The Farmer-Led Theory argues that consumer demand is not necessary to scale regenerative agriculture in the U.S. (or globally). Instead, it will scale because it delivers better economics and agronomics to farmers.

According to this theory, the adoption of regenerative practices will be driven by farmers themselves, fueled by word of mouth and the growing network of agronomic services and agtech solutions that are focused on supporting regenerative transitions. As farmers experience the benefits of regenerative systems – e.g., improved crop health, reduced need for expensive synthetic inputs, improved water infiltration and retention, better resilience during extreme weather events – then those farmers will spread the word about regenerative agriculture.

As regen acreage grows, according to this theory, the network of support services will also grow, e.g., technology to validate regenerative practices at scale; solutions to segregate, distribute and process regenerative food; financial products adapted to meet regenerative practices.

The result will be an acceleration of acreage under regenerative management – all of which would happen independent of consumer demand.

## **The Electric Car Theory**

The Electric Car Theory<sup>3</sup> posits that consumer demand will be important, but not right away. First, regen must focus on a coordinated set of upfront investments, similar to how the electric car industry scaled.

According to this theory, the regen movement must do the following before investing substantially in consumer demand:

- Establish a shared definition of regenerative practices, ideally grounded in scientific research, along with a certification and auditing framework for enforcing that standard, plus public dollars that help promote the standard;
- Create a public policy and regulatory framework that cultivates the optimal conditions for regenerative investments, including, for example, the adoption of Scope 3 reporting rules, various changes to the Farm Bill and shifts in insurance underwriting practices; and
- Facilitate substantial capital investments – public, private and philanthropic – that help to finance acreage transitions at scale in a way that reduces risk to farmers.

Until those conditions are met, according to this theory, investments in consumer demand will be inefficient and ineffective. A parallel can be drawn to Tesla, which was founded in 2003 but did not introduce its first mass market vehicle, the Tesla Model 3 sedan, until 2016. Before the first Model 3 was shipped, the federal government invested billions of dollars, new public policies were created, charging station infrastructure was built, consumer incentives deployed, battery technology advanced, along with other efforts to enable scale. Once most of

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3. Credit for this name goes to Carolyn Gahn, Senior Director of Mission & Advocacy at Applegate. Several interviewees articulated a similar theory, but Carolyn crystallized the theory by coining the phrase.



that was in place, consumer demand investments accelerated. Regen could copy that playbook.

## **The Consumer-Led Theory**

The Consumer-Led Theory posits that strong consumer demand is not only essential for scaling regenerative agriculture, it is the most essential element.

According to this theory, a strong and sustained demand signal is a requirement for farmers to invest in regenerative conversion at a broad scale, and the demand signal requires consumer uptake. Ultimately, farmers grow what they can sell. If there is not a mature market, then they will not take a risk on creating supply – at least not at scale.

Implicit in this theory is an assumption that farmers will be required to bear the bulk of the risk associated with regenerative conversion, which is what happened with the organic movement decades ago. In effect, this theory presumes that the Electric Car Theory will not happen, given the current state of public policy and financing for regen.

Therefore, since farmers will be asked to bear more of the risk, they will be much more likely to require a strong consumer demand signal before making the leap across a broad range of acreage.

A version of this theory says that retailers will drive consumer demand, similar to their role with Non-GMO Project Verification. Retailers will incentivize the adoption of regenerative practices by giving preferential shelf space and visibility to brands that adopt regenerative certification.

## **The Co-Creation Theory**

The Co-Creation Theory blends elements of the Consumer-Led Theory and the Farmer-Led Theory. It posits that the regen movement must build a groundswell of consumer demand alongside a comparable groundswell among farmers, emphasizing deep collaboration between demand-creators and farmers themselves.

Like the Consumer-Led Theory, this framework tends to assume that government intervention and large capital investments are unlikely to happen in the near term – at least not without sufficient pressure from both consumers (as voters) and farmers (as an interest group).

Therefore, according to this theory, farmers and brands must collaborate to create a market for regenerative agriculture, which will eventually accelerate change at all the necessary

levels, from public policy to financing to infrastructure.

While retailers have a critical role to play, this theory tends to accept what is currently true: No retailers have emerged with a commitment to regen that is comparable to that of Non-GMO Project Verification. With multiple competing certifications and various headwinds, this theory assumes that it is unrealistic to expect retailers to be the same catalyzing force that they were in the non-GMO movement.



Regenerative farmers in Peru. Source: SIMPLi.

# A Blueprint for Accelerating Consumer Demand

**Regenerative agriculture is a once-in-a-generation opportunity to dramatically shift consumer behavior toward positive human health, climate and farm-level outcomes.**

However, according to most of the executives that we interviewed, the regen movement needs to shift its approach to driving consumer demand.

We distilled the best practices, lessons and challenges that we heard into what we're calling a blueprint for accelerating consumer demand. It's "a blueprint" and not "the blueprint," because our conversations were not exhaustive. Yet, based on initial feedback to our findings, we're confident that this blueprint is a solid starting point for continued iteration.

The blueprint has four key elements, which we'll cover in depth throughout this section.

## **ELEMENT #1: Increase Consumer Empathy**

### **The Consensus**

The regen movement needs better shared insights about what would motivate consumers to care about regen and what messaging would work best to drive purchase intent.

### **The Situation**

Few interviewees had conducted in-depth, primary consumer research about regenerative agriculture. Several brands had used limited survey tools (e.g., Social Nature or Instagram polls), but only a few had gone much further. Among the few who had, they had not shared their detailed findings widely with other regen brands.

As a consequence, the movement is starved of consumer empathy – which is Smoketown’s language for having a deep understanding of the attitudes and beliefs that shape behavior. In this case, most regen marketers cannot explain, for example, why regen-focused messaging often under-performs, or why some digital ads drive higher return on advertising spend (ROAS), or why some subject-lines drive higher open rates than others, and so on.

In fact, nearly every interviewee acknowledged that this lack of consumer empathy is a significant barrier to growth for the regen movement, which is why we’ve listed it as the first key element in a blueprint for accelerating consumer demand.

### **Actions to Take**

The regen movement needs more primary consumer research. When research is conducted, those insights need to be shared more broadly. If those two things can happen, then every marketing team will be able to make better decisions, which will ultimately accelerate demand for the entire regen sector. It’s notable that Alpha Food Labs reached a similar conclusion in 2020, which led to their global consumer study, commissioned by Beef + Lamb New Zealand and New Zealand Winegrowers. We borrow from their approach below.

How can that happen? We identified three potential actions to take.

- Certifiers and other membership organizations could ask their members to share the results of primary consumer research with fellow members.
- A third-party consultant could be commissioned to read, synthesize and summarize the collective findings from all available primary consumer research, including research conducted by brands. See below for an example of what a meta-analysis could yield.
- A third-party agency could be commissioned to conduct primary consumer research, on behalf of a consortium of stakeholders, that is designed to fill their insight gaps and also share with the broader movement. See below for an example learning plan.

## **What Insights Do We Already Have?**

We were given very limited access to primary consumer research from just two brands, which we cross-referenced with published research results from Kiss the Ground, the Non-GMO Project and Alpha Food Labs. Here are some shared themes from those studies, which we share as an example of what can be learned if we combine insights gathered across the regen movement.

- Third-party certifications are seen as credible because the product has passed someone's standards & testing protocol.
- Regenerative agriculture, as a term, is unfamiliar, confusing and counterintuitive.
- Regenerative agriculture can be polarizing as a claim. It can be misunderstood (e.g., "genetic modification?"), or introduces a new concern (e.g., farming damages the soil?), or the word "agriculture" does not seem relevant to a packaged food or beverage product.
- Linking regenerative to organic can make it clearer and more compelling, since organic is better understood by some consumers. However, adding "organic" could also add confusion by implying that organic is already regenerative.

## **What Insights Do We Still Need?**

What follows is a draft learning plan that reflects the level of consumer empathy that Smoketown believes the regen movement needs.

### **Awareness and Familiarity**

Across interviews and studies, a wide range of consumer awareness is reported for regenerative agriculture or regen certifications – from 4% to 77%. But methodological questions make it difficult to either trust or compare most figures.

What research questions should a learning plan address?

- What is the true level of unaided and aided awareness for regenerative agriculture and regen certifications?
- Among those aware of regen, how familiar are they with what regen means?
- How is this trending across time, channels, psychographics and demographics?

## **What Insights Do We Still Need? (continued)**

### **Consumer Needs and Understanding of Regen**

Nearly every interviewee shared a concern that regenerative agriculture, as a term and set of practices, is “complex” or “not intuitive.” And yet many also report that, once regen is explained, consumer interest increases significantly.

What research questions should a learning plan address?

- What do consumers believe the term regenerative agriculture means, when they are only exposed to the term without an explanation?
- Which of regen’s benefits are most compelling and why? How do taste, nutrition and sustainability benefits compare? How does that change across categories?
- Which regenerative practices provide the most compelling reasons to believe (RTBs) in regen’s benefits and why?
- How does this vary across time, channels, psychographics and demographics?

### **Messaging Effectiveness**

Very few interviewees have done primary consumer research on messaging and claims to understand their effectiveness at different levels of the purchase funnel. Even fewer are testing often enough to drive ongoing confidence in their messaging.

What research questions should a learning plan address?

- What messages are the most effective for driving engagement at different levels of the purchase funnel (e.g., familiarity vs. consideration vs. trial vs. loyalty)?
- How does this vary by category?
- How does this vary across time, channels, psychographics and demographics?

## ELEMENT #2: Refine the Messaging Frame

### The Consensus

The most effective consumer messaging about regenerative agriculture probably links soil health with improved nutrition and taste, emphasizing farmers as the source of trust; therefore, the regen movement should do what's necessary to enable that messaging.<sup>4</sup>

### The Situation

There's a disconnect between how brands are talking about regenerative agriculture and what most interviewees believe will ultimately drive the most consumer demand.

Today, when brands talk about regenerative agriculture, the majority use messaging that is focused on fixing a problem (with climate or soil health) or explaining regenerative practices.<sup>4</sup> These are extrinsic motivators that require a level of altruism or future-orientation for consumers to care.

However, most interviewees do not believe that kind of messaging alone will accelerate demand for regeneratively grown food. Ultimately, despite what consumers might say in a survey, the reality is that intrinsic benefits, primarily taste, nutrition and price, are consistently the most impactful on purchase interest in food and beverage categories. To be clear, some consumers care about climate or other extrinsic motivations; it's just that they tend to care about taste, nutrition and price significantly more. This tension has been seen across generations and across FMCG categories, it was echoed in Alpha Food Labs' study, and it is supported by primary consumer research results from some companies that we interviewed.

That may seem like bad news, since the messaging landscape across regen today is not focused on nutrition or taste. But there's good news on the horizon. Why? Three reasons.

1

#### Healthier Soil = More Nutritious Food

The science is clear that better soil health produces more nutritious food.<sup>5</sup>

Organizations like Edacious<sup>6</sup> and the Bionutrient Food Association are taking this further; they are laying the scientific groundwork to help farmers and brands prove that their regenerative practices produce better soil and more nutritious food.

Meanwhile, Nutrient Density Alliance laid out a compelling road map for brands that want to make nutrient density claims based on regenerative practices, arguing that there is already a "business case and consumer interest" for doing so.<sup>7</sup>

The science also suggests that nutrition and taste are linked at the phytonutrient level for plants and animals.<sup>8</sup> In other words, better nutrition may be correlated with better taste for some species, which would mean that regenerative practices may also

4. In June 2024, one of the interviewees conducted a comprehensive audit of packaging claims used by dozens of regenerative brands. Most were similar to claims like "Supporting soil, habitat and communities" or "Our regenerative grass fed beef helps restore soil health and heal the environment."

5. Presentation by Tina Owens of Nutrient Density Alliance on June 11, 2024 at the Bionutrient Food Association's 11th Soil And Nutrition Conference.

6. See Cross-Pollination section to learn more about Edacious.

7. "Engaging Consumers on Regenerative Agriculture," Nutrient Density Alliance, March 2024, <https://www.nutrientdensityalliance.org/whitepaper>.

8. David R. Montgomery and Anne Biklé, [How to Heal Our Land and Reclaim Our Health](#) (W. W. Norton & Company, 2022).

eventually be linked empirically to better taste. Today, anecdotally, chefs and farmers have already reached that conclusion, leading to collaboration between regenerative farmers and fine dining restaurants.

2

### **Consumers “Get It”**

There’s more good news: this linkage between soil health and food nutrition is intuitive for many consumers. They “get it.” There is both quantitative and anecdotal evidence for this.

- A January 2024 survey by Non-GMO Project found that 68% of conventional shoppers and 78% of “natural shoppers” agree with the statement, “I believe the health of the soil impacts the nutrition in my food and my health.” Similarly, in Alpha Food Labs’ study with ~40 U.S. consumers in October 2021, the top performing concept said “Healthier Soils Mean Healthier, Tastier Food”.<sup>9</sup>
- In the world of home gardening, the link between soil health and food quality appears to already be well understood, as evidenced by the advertising campaign of one of the largest home lawn and garden brands in the world.<sup>10</sup>

3

### **Focusing on Farmers**

Why will consumers trust any of this? Because they trust farmers. Primary consumer research by Smoketown, along with anecdotal evidence from several interviewees, suggests that consumers trust farmers more than many other voices in the food industry. As a result, when farmers are centered in the messaging and storytelling, consumer trust and engagement often increase.

## **Actions to Take**

The regen movement should deploy the resources necessary to shift toward messaging that’s based on nutrition and that’s grounded in relationships between brands and their farmers.

How? We identified four sets of actions that brands can take.

- Pursue certification of regenerative practices, since certification increases your understanding of the practices in your supply chain, increases the movement’s integrity and increases consumer trust in the brand.<sup>11</sup>
- Understand the science that is linking soil health and food nutrition and explore whether there’s an opportunity for your brand to make claims.
  - Build deeper relationships with regen farmers in your supply chain to understand their practices and understand what evidence they have about nutrition levels.

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9. “Who Is the Natural Shopper in 2024?,” Non-GMO Project, January 2024, <https://www.nongmoproject.org/blog/who-is-the-natural-shopper-in-2024/>.  
“Regenerative Agriculture: Consumer Insights,” Alpha Labs, October 2021.

10. See Cross-Pollination section to learn more.

11. Ibid Non-GMO Project



- Connect regen farmers in your supply chain with Edacious to learn whether nutrition testing can be done affordably – and then offer to pay the cost.
- Follow the principles laid out by the Nutrient Density Alliance white paper before making nutrition claims based on regen practices.<sup>12</sup>
- Talk with an attorney to help you understand litigation risk associated with claims.
- Educate consumers about the relationship between soil health and food nutrition, being careful not to make direct claims that cannot be substantiated.
  - Relentlessly experiment with honest, high-integrity messaging across social media, email headlines and other digital platforms to find the most effective approach to talking about soil health and nutrition.
  - Share those testing results with other regen brands.
- Target audiences who already intuitively understand the link between soil health and food nutrition, e.g., home gardening audiences or look-alikes on Meta and other social media platforms, especially subgroups interested in no-till gardening or organic gardening.

## **ELEMENT #3: Double Down on Loyalty and Share of Wallet**

### **The Consensus**

A significant opportunity exists to improve ROI and increase demand for regen by leaning on mid- and lower-funnel tactics that expand loyalty and share of wallet (i.e., increasing the percentage of a consumer’s purchases that are from regenerative brands).

### **The Situation**

Many interviewees reported that regen messaging had lower ROAS, engagement rates and other metrics, especially when used in upper-funnel tactics and compared with other messaging that’s focused on the brand’s core intrinsic benefits. However, other interviewees found that regen messaging can be quite effective in middle- to lower-funnel tactics like email, retargeted digital advertising or targeted influencer activation like Social Nature; these tactics can target consumers who are already in a brand’s funnel or consumers who are already exploring regenerative agriculture.

In addition, some interviewees report that, once regen is explained to a consumer (e.g., after email exposure or after seeing “Kiss the Ground”), their interest and engagement tends to increase. This is supported by some research, which finds high levels of interest among people after they’re told what regenerative agriculture is.

All of this implies that the regen movement has an opportunity to improve the effectiveness of advertising by using mid- and lower-funnel tactics more often. By doing that, they will increase loyalty and share of wallet and improve ROI.

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12. “Engaging Consumers on Regenerative Agriculture,” Nutrient Density Alliance, March 2024, <https://www.nutrientdensityalliance.org/whitepaper>.

## Actions to Take

Regen marketers should consider increasing the percentage of their marketing investments that are focused on two objectives:

- Increasing loyalty to regen among consumers who have already tried reg products; and
- Converting consumers who are “regen curious” (e.g., they’ve researched and explored it) but have not yet purchased a regenerative brand.

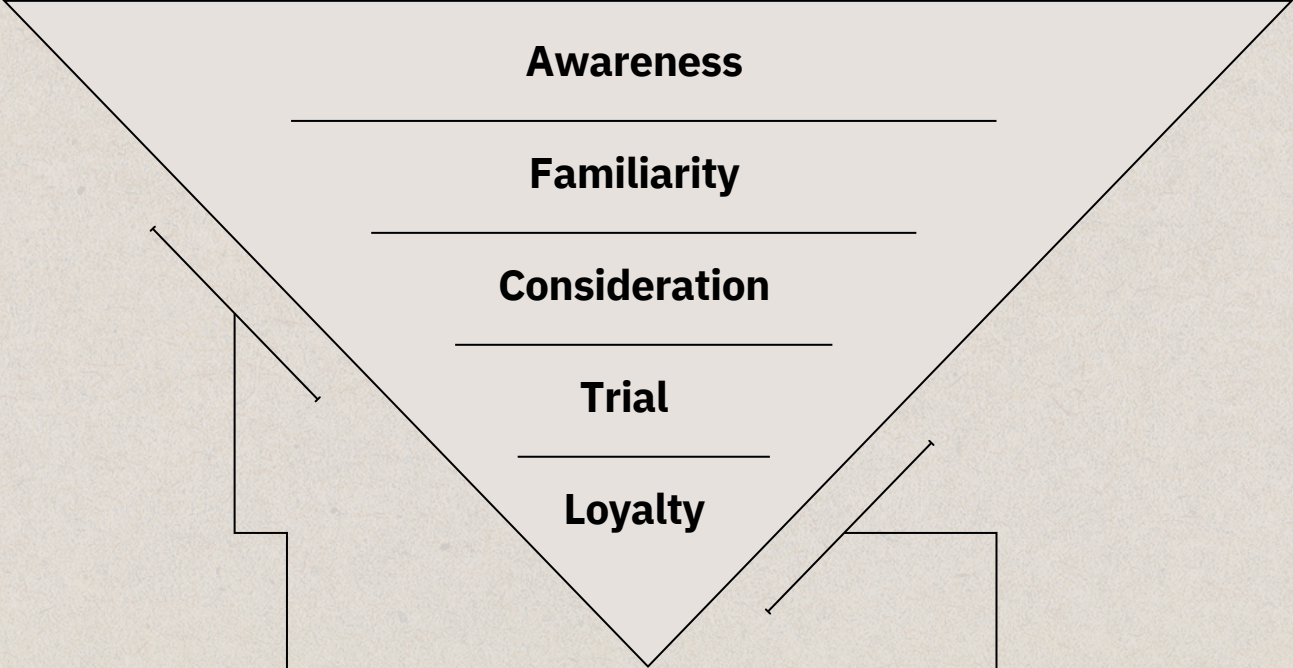
How? We identified five potential actions to take. Note that all these actions will be more effective if they are combined with the rest of the recommendations in this blueprint.

- Experiment with more mid- and lower-funnel tactics that can target current regen purchasers or the “regen curious.” See our list of tactics to consider, below.
- Cross-promote relentlessly across regen brands, ideally with retailer support.
- Build larger email/SMS lists within each brand and, within the constraints of privacy policies, share those lists with other regen brands.
- Increase the amount of first-party data (e.g., Shopify data) and, within the constraints of privacy policies, find ways to leverage that data across tactics and other regen brands.
- Create more content that deepens consumer understanding of, and commitment to, regenerative agriculture and then deliver that content in a targeted way to current purchasers or the “regen curious.”



Regenerative Organic Certified farm in Peru. Source: SIMPLi.

# Mid- and lower-funnel tactics to consider for regen messaging



- Mid-Funnel Ideas**
- Compelling content for email, blog, website, podcast or video
  - Strong A+ Content on Amazon
  - Retargeting using pixels or email
  - Look-alike targeting using email or AI on social or Youtube
  - Targeting on retailer or Amazon DSPs
  - Review seeding (within the rules)
  - Social Nature

- Lower-Funnel Ideas**
- Strong packaging design
  - Strong, A/B-tested product listing on all ecom platforms
  - Strong SEO on Google and YouTube using robust content that can also feed email, blog, website, podcast or video that engages fans
  - In-store communication of all kinds: digital out-of-home, shelf signage, demos or Frontline display
  - Instacart Shoppable Display

## **ELEMENT #4: Boldly Collaborate for Big Awareness**

### **The Consensus**

The regen movement must collaborate more effectively to drive a big increase in consumer awareness, given limited budgets and resources.

### **The Situation**

Most interviewees think that consumer awareness and familiarity for regenerative agriculture are “very low,” likely in the single digits (e.g., ~4% according to the Kiss the Ground survey).<sup>13</sup> This is the consensus view despite studies from some groups like the Non-GMO Project or The Hartman Group that report much higher levels of awareness (e.g., 77% according to The Hartman Group’s “Sustainability 2023” report).

That said, the level of awareness is growing. Based on that, one interviewee conducted an interesting analysis, using social media mentions as a proxy for consumer interest in food claims. In that analysis, they tracked the social media growth rate of four comparable food claims (e.g., organic or Fair Trade), and then they applied that growth curve to regenerative agriculture. It showed that regen’s growth rate appears to be on par with other food claims. In addition, their analysis suggested that the market for regenerative food could be comparable in size to organic within a decade, based on extrapolations from that social media curve.

However, unless something changes, there is also widespread acknowledgement that dramatic improvements in awareness will be a challenge. This is driven by several growth obstacles, according to some interviewees.

- Marketing budgets are almost universally low – usually well below \$1 million per year for regen-focused messaging, according to high-level budget figures that were shared.
- Multiple competing certifications and definitions of regenerative agriculture have made it difficult for retailers and policymakers to fully throw their weight behind a single certification, as they did with Non-GMO Project Verified. Some interviewees point out that the organic movement faced the same challenges in its early years.<sup>14</sup>
- Those competing certifications and definitions are also “complicated” and poorly understood, including the trademark logos themselves, which are not nearly as simple as the National Organic Program’s certification stamp or the Non-GMO Project Verified’s butterfly seal.
- “In-fighting” among those competing certifiers has undermined the kind of collaboration and coordination that’s necessary to accelerate scale.

Given all of this, there is broad conviction that the quantity and quality of collaboration must significantly improve if we’re going to drive big increases in awareness.

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13. Kiss The Ground’s New Study Reveals Only 4% of US Adults Understand the Significance of Regenerative Agriculture," Kiss the Ground, May 2023, <https://kisstheground.com/research/>.

14. See Cross-Pollination section for thoughts on parallels with organic.

## Actions to Take

The regen movement should collaborate more effectively, ideally in big, bold ways, to accelerate growth in consumer awareness and demand. How? We identified four potential actions to take.

- For certified brands: Increase the level of coordinated activation among brands that share a certification. Progress has begun on this front, as of this writing, with Regenerative Organic Alliance having hired a marketer to help coordinate efforts.
- Join the ReGen Brands Coalition, a new trade association for CPG brands supporting regenerative agriculture, or other efforts to create intentional collaboration across the movement, regardless of certification.
- Take the actions recommended in the rest of this blueprint, except do them in collaboration with other regen brands.
- Chase bold, audacious ideas together. (See examples, below.)

## Bold Ideas for Collaboration

1

### Cultural Tentpole Event

The Idea: SXSW x Essence Fest x Gathering of Nations x TEDx

The regen movement could create a tentpole event to activate the deep well of culture-shapers that champion regenerative food: farmers, celebrities, doctors and nutritionists, First Nations leaders, entrepreneurs, biologists, biohackers, technologists and others.

Force of Nature's What Good Shall I Do conference, combined with Kiss the Ground's national platform, could be inspiration for something that could shape culture in a big way.

2

### Convert Healthcare

The Idea: A full-scale, science-backed effort to convert the healthcare industry into regen believers

When probiotics scaled nationally, a key factor was likely healthcare providers, both conventional and alternative, who became advocates for the importance of gut health, which led to increased demand for solutions that improve the gut microbiome.

The regen movement could create a coordinated effort to fund the science and advocacy necessary to persuade the healthcare industry that regen is vital to human health.

3

### Got Regeneration?

The Idea: A collaborative, big-budget marketing campaign with national scale

The regen movement could create the regenerative equivalent of “Got Milk”: a national, omnichannel, long-term marketing campaign that drives a step-change increase in consumer awareness and familiarity. This would take care of upper-funnel awareness tactics, freeing up brands to focus on mid- and lower-funnel conversion and differentiation.

What could we do with \$50 million per year, sourced from dozens of brands?



Source: Purely Elizabeth.

## What's Next? Pragmatism and Optimism

This blueprint operates on two levels, offering the movement two ways forward.

First, the blueprint is pragmatic. It summarizes the collective wisdom gathered from 20+ regen executives, providing over a dozen concrete actions that brands, retailers and others can take right now to shift more consumers into the regenerative column.

However, zooming out to see the bigger picture, this blueprint also demonstrates that the regen movement should be optimistic about what's possible. A convergence of factors means that regenerative agriculture, though it is ancient in many of its practices, has the newfound potential to deliver a strong value proposition to both mainstream consumers and the farmers who feed them, making it the food industry's most potent opportunity for positive transformation.

Therefore, regen's biggest limitation is probably not consumers, retailers or farmers. It is ourselves as a movement. Can we collaborate enough to accelerate the science and claims, maximize our marketing impact and partner deeply with farmers, and, in so doing, create a market that shifts the trajectory of the food industry?

The answer to that question lies with you.

## A Blueprint for Accelerating Consumer Demand for Regen Summary on a Page

1

### **Increase Consumer Empathy**

The regen movement needs better shared insights about why consumers care and what messaging works best to drive interest in regen.

2

### **Refine the Messaging Frame**

The most effective messaging about regen probably links soil health with improved nutrition and taste, with farmers as the source of trust – so the regen movement should do what’s necessary to enable that messaging.

3

### **Double Down on Loyalty and Share of Wallet**

There is a significant opportunity for consumer brands to improve ROIs and increase demand for regen by emphasizing mid- and lower-funnel tactics that will increase loyalty and share of wallet.

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### **Boldly Collaborate for Big Awareness**

The regen movement must collaborate better in order to drive a big increase in consumer awareness, given limited budgets and resources.



# Cross-Pollination: Mini Case Studies

**The regen movement has the opportunity to learn from a wide range of stakeholders, categories and parallels. Below, we've compiled a few that stood out to us.**

## **Edacious: The Nutrient Density and Data Unlock for Regen**

Edacious is addressing a challenge in regenerative agriculture by unlocking nutrient density as an innovative solution, inspired by the vision and work of the Bionutrient Food Association.

Imagine you're a regenerative rancher who believes your stewardship practices enhance the nutrient density of your cattle. Instead of relying on the USDA's standardized Nutrition Facts Panel (NFP), you send your samples off for an analysis to go beyond the traditional NFP data.

Currently, proving this would require expensive lab tests, often costing thousands of dollars for a single analysis. On top of that, the results could vary due to seasonal changes, grazing conditions or shifts in management practices — making such testing impractical for ranchers already working within narrow profit margins.

Edacious has developed cost-effective testing protocols, supported by state-of-the-art labs and data visualization software, which significantly reduce the cost of testing. These tools make it affordable for ranchers and deliver results through an easy-to-use technology platform, simplifying the process of understanding and tracking nutritional data over time.

Edacious is now open for business, working with producers and brands to communicate the nutritional value of their products. Edacious currently offers animal product testing, and they are expanding their capabilities to offer the same service for grains and vegetables, laying the foundation for a broader impact in regenerative agriculture.

(Disclaimer: The author is an advisor at Trailhead Capital, an investor in Edacious; however, he is not an equity holder and is not in a position to profit from Edacious in any way.)

## **The Gut Microbiome: Learning From the Growth of Probiotics**

Similar to regen, probiotics are a difficult concept to explain: The gut has a microbiome that's full of beneficial microbes that, when nurtured properly, improve the immune system and other health outcomes. Even when consumers misunderstand the details, the core idea is persuasive (per qualitative consumer research conducted by Smoketown).

The comparison to soil health is almost 1:1. Given that parallel, how can the regen movement learn from the way probiotics and the gut microbiome gained mainstream acceptance?

Potential areas of cross-pollination:

- What was the sequence of trust-building steps that led so many traditional healthcare providers to fully embrace probiotics and gut health?
- What sources of information have been the most influential in educating consumers about the gut microbiome?
- How much scientific complexity have consumers been able to absorb when learning about the gut microbiome?
- When was the tipping point reached for probiotics? What role did innovation play in that?

## **Soil Health: Martha Stewart, Miracle-Gro and Soil Messaging**

As one of the world's largest purveyors of synthetic chemicals for home lawn and garden needs, ScottsMiracle-Gro is perhaps the last place regen marketers would want to learn a lesson in messaging.

However, at ~\$1 billion in U.S. revenue, ScottsMiracle-Gro is the kind of FMCG company that invests in rigorous consumer research when developing marketing messages. That's why their recent marketing campaign for Miracle-Gro Organic Raised Bed & Garden Soil is noteworthy.

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The marketing campaign, which features Martha Stewart and her personal gardener, is focused on the importance of soil nutrients in creating healthier plants. In one of the ads, Martha says, “What people don’t know is that it’s all about the dirt. You need dirt with the right kind of nutrients.”<sup>15</sup>

This messaging choice is not accidental. By choosing soil health as the core benefit of its organic soil product, ScottsMiracle-Gro probably has data to prove that it’s compelling to their mainstream consumer target. And, if it’s compelling to their consumer, then it seems logical that a soil health and nutrition message could work for regenerative products too.

In addition, this suggests that organic gardeners could be early adopters of regeneratively grown products, given their intuitive understanding of soil health’s importance to crop health.

## **The Organic Movement: Digging for Lessons**

What can the regenerative movement learn from its predecessor, organic? Many interviewees drew parallels – both positive and cautionary – between the two. Organic food has grown to nearly \$62 billion in sales in the U.S.,<sup>16</sup> which, in turn, has fueled organic farming in the U.S., though it is still a very small percentage of U.S. acreage (~1% by some estimates).

The regen movement would benefit from a comprehensive history of organic’s path to national scale, so that it can apply those lessons to regenerative agriculture. Here are some of the parallels and questions that were raised through our interviews.

- The organic movement was fractious in its early days. What were the fault lines? What was the process of finding shared ground and cohesion? What lessons can be learned from the creation of a federal certification?
- Decades after its emergence, organic is still a source of confusion for many consumers. Even as late as 2018, over half of U.S. adults were not convinced that organic food is healthier, including 30% of adults who buy lots of organic food.<sup>17</sup> Meanwhile, organic’s share of total U.S. food sales was less than 10% in 2022.<sup>18</sup> What has constrained organic’s growth potential? Which marketing efforts have been the most successful and most challenged?
- Organic farmers face intense financial pressure to drive down cost and increase yield, leading to the adoption of conventional practices like tillage (65% of organic farms in 2021)<sup>19</sup> and minimal outdoor access for animals. How has that impacted consumer perceptions of what “organic” truly means? How has that impacted the nutrient value of organic food compared to conventional and regenerative?

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15. “Talking Dirt with Martha Stewart” from Miracle-Gro, <https://ispot.tv/a/6pb8>.

16. “Organic food sales break through \$60 billion in 2022,” Organic Trade Association, May 10, 2023, <https://ota.com/news/press-releases/22820>.

17. “Americans are divided over whether eating organic foods makes for better health,” Pew Research Center, November 26, 2018, <https://www.pewresearch.org/short-reads/2018/11/26/americans-are-divided-over-whether-eating-organic-foods-makes-for-better-health/>.

18. “Organic food sales break through \$60 billion in 2022,” Organic Trade Association, May 10, 2023, <https://ota.com/news/press-releases/22820>.

19. “2021 Certified Organics Executive Briefing,” USDA National Agricultural Statistics Service, December 15, 2022, [https://www.nass.usda.gov/Publications/Todays\\_Reports/reports/fnlo0222.pdf](https://www.nass.usda.gov/Publications/Todays_Reports/reports/fnlo0222.pdf).

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# About the Author & Smoketown



Ryan Pintado-Vertner is a Chicago-based activist and strategic marketing veteran with two decades of experience guiding the strategy, marketing and innovation choices of Fortune-level brands, startups, and nonprofit organizations. He earned his MBA from the Haas School of Business at U.C.-Berkeley.

Ryan believes it's not enough to create yet another brand in the marketplace. We have to go beyond the basics to create brands with empathy, purpose and vision – brands that will bring more justice, regeneration, equity and wellness to the world.

He is the Founder & CEO at Smoketown ([www.WeAreSmoketown.com](http://www.WeAreSmoketown.com)), a boutique brand consultancy whose strategy practice and fractional CMO services help mission-driven consumer brands maximize their growth and build more traction, all while having a transformative social and climate impact. In 2024, Smoketown is celebrating its sixth year of leading change for over 50 brands and social enterprises, including [Bragg Live Foods](#), [Purely Elizabeth](#) and [DeeBee's Organics](#).

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