

Retailers shaping Scope 3 without direct control



Lessons from the Doers

In this series, Retailer, Regen brand and Experts from the industry share insights on regenerative sourcing. They are innovators driving a resilient, net-zero food system and we have aimed to ask the questions that will help others move in the same direction.

Agricultural upstream emissions sit outside of retailers' direct control, yet they signal system resilience, which is increasingly affected by supply security, cost exposure, and long-term competitiveness. Most retailers to this day have made net-zero commitments. Around 90% of their carbon footprint sits in Scope 3, which pushes them to face a critical reality: turning ambition into transformation depends on supply chains they influence but do not control.

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The 90% Problem: How are Retailers tackling their Scope 3 without direct control

Based on in-depth conversations with major European retailer organisations and leading regenerative brand and expert, this report explores where decarbonisation efforts are gaining traction, where they're falling short, and why investing in farmers' regenerative agricultural transitions is emerging as both a climate lever and a commercial challenge.

What becomes clear from these: collaboration, net zero financing models, and stronger communication with consumers, not certifications or pledges alone, will determine leadership to influence a net-zero food system, while high-quality products, great taste, and effective packaging remain non-negotiable drivers of consumer choice and commercial performance.



Inge De Paepe, Sustainability Manager at Delhaize

Inge brings the expertise of a Belgium retailer, part of a multinational retail group.



Els Bedert, Director Product Policy & Sustainability, at EuroCommerce

Els shares the big-picture view of a European retailers.



Rob Bray, Chief Sustainability Officer at Wildfarmed

Rob offers the experience of building a 100% Regen brand sold in major supermarkets.



Anthony Corsaro, Founder, ReGen Brands

Anthony provides an American perspective as well as a deep expertise in working with Regen Ag brands.



Who	Belgian supermarket chain.
Key Date	2022 Group Ahold Delhaize updated its value-chain (Scope 3) climate target in line with a 1.5°C pathway.
Goal	Cut emissions substantially by 2030, and reach net-zero across the value chain by 2050.
Scope	Emphasis on Scope 3 (suppliers, producers, farmers) through supply-chain collaboration and supplier engagement.
Impact	Uses its retailer leverage to drive supplier emissions' measurement and science-based targets while directly enabling on-farm regenerative practices.
Special Power	Purchasing power with supplier orchestration across a large portfolio + incentives baked into governance (sustainability links to variable remuneration for managers).



Who	European trade association representing the retail and wholesale sector.
Key Date	June 2024: EuroCommerce published the " <u>Net Zero Game Changer</u> " report (in collaboration with Oliver Wyman), highlighting the hidden carbon footprint of the European retail and wholesale value chains.
Goal	Support the transition to a net-zero and sustainable European retail system.
Scope	Research, policy, knowledge sharing.
Impact	Accelerates climate action across Europe's retailers by aligning actors around shared approaches to Scope 3 reduction, data harmonisation, and implementation.
Special Power	Pre-competitive coordination at scale.



Who	Regenerative food and farming company supplying flour, oats and barley crops.
Key Date	Founded in 2018 by Andy Cato, George Lamb, and Edd Lees.
Goal	Accelerate the transition to regenerative agriculture by restoring nature and ecosystems, supporting farmer livelihoods, to get better food, from better farms, onto the high street.
Scope	End-to-end value chain: works directly with farmers on regenerative practices and brings fully traceable products to mainstream retail like Tesco, Waitrose, Ocado and more than 1,000 food businesses from high street favourites to Michelin-starred restaurants.
Impact	Proves that products sourced from regenerative farming can deliver real environmental gains while remaining commercially viable at retail scale.
Special Power	Traceability + outcomes-based measurement directly linked to consumer-facing products.

REGENBRANDS

Who	Brand advisor and connector, supporting Regen CPG (Consumer Packaged Goods) growth strategies.
Key Date	Created in the early 2020s with the launch of the first regenerative brands trade association in 2024.
Goal	Scale regenerative agriculture by turning market demand from brands and retailers into credible, commercially viable pathways aligned with net-zero goals.
Scope	Works with CPG brands, retailers, and stakeholders, providing research, insights, education, and convening focused on regenerative sourcing and claims.
Impact	Helps make regenerative agriculture scalable by clarifying what actually works in the market.
Special Power	<u>Regen Brands Podcast</u> (100+ episodes)

The challenge: around 90% of Retailers' emissions sit in Scope 3, largely tied to agricultural practices they do not have influence on.

1. From Control to Orchestration: How impact actually happens

Retailers do not control farms or supplier operations but they shape incentives, standards and investment flows.

What is working?

- Supplier segmentation (strategic, top footprint, own-brand/local) with differentiated engagement models.
- Long-term partnerships focused on data, roadmaps and capability building, not one-off audits.
- Retailers acting as facilitators for stakeholder alignment (suppliers, farmers, researchers, etc).

Scope 3 progress comes from ecosystem orchestration.

2. Collaboration is the only Scalable Model

Fragmented data requests and competing standards slow progress and erode trust.

Where is traction emerging?

- Shared footprinting platforms and joint data initiatives.
- Sector-wide sourcing standards that make sustainability the default.
- Open or pre-competitive programmes that reduce supplier burden.

Retailers that collaborate, even with competitors, move faster, at a lower cost and with greater supplier buy-in.

3. Regenerative Agriculture: Climate lever, Commercial test

Regenerative agriculture is increasingly seen as essential for emissions' reductions, climate resilience and long-term security of supply. However, building a clear and scalable business case across the value chain can be strengthened.

What is holding it back?

- Farmers need more support for their transition costs.
- Premium pricing alone cannot fund scale.
- Current pilots remain small and concentrated on own-brand ranges.

Regenerative sourcing must be treated as long-term infrastructure investment, supported by shared financing and risk-sharing, not as a niche premium offer.

4. Why Consumer Demand is not the primary driver (yet)?

Consumers express concern about sustainability, but price, quality, convenience and availability still dominate purchasing decisions.

What does this mean in practice?

- Product excellence is a non-negotiable.
- Sustainability supports brand trust and loyalty more than immediate sales.
- Overly technical claims fail; simple, local, human stories work best.

Consumer demand will not move fast enough to deliver Scope 3 targets. Building resilience, meeting legislation and going beyond when needed, as well as addressing supply risks, are the real near-term drivers.

5. Beyond Pledges and Certification: What will make a difference?

Awareness of regenerative agriculture's potential is rising, with potential to accelerate through greater coordination and execution.

What are leaders investing in?

- Harmonised data and credible measurement.
- Clear internal alignment across sustainability, sourcing, finance and merchandising.
- Better translation of farm-level change into commercial and consumer relevance.

Leadership will be defined by execution capability, not ambition statements.

Conclusion

Retailers will not "solve" the Scope 3 challenge alone but they can shape its trajectory. Those that lead will:

- Move from control to collaboration.
- Mitigate risks and channel investment together with suppliers and farmers.
- Treat regenerative agriculture as a resilience strategy, not a marketing claim.
- Build the systems (data, partnerships and narratives) needed to scale change.

CONVERSATION #1

The Retailer's perspective

With 90% of a retailer's carbon emissions sitting in Scope 3, retailers hold a strategic position when it comes to decarbonising the food system, but where does influence genuinely become impact?

Els Bedert, EuroCommerce:

Retailers are the essential link between suppliers and consumers. That position allows us to work on both sides of the value chain. However, I would like to highlight that the word "strategically" does not imply influence and control which retailers do not necessarily have. For Scope 1 and 2 emissions, retailers understand how to work on them, and they are largely under control, even if costly. Scope 3 is a completely different challenge. Retailers can contribute, but they cannot exert total control.

Inge De Paepe, Delhaize:

Indeed but at Delhaize, we have an ambitious carbon roadmap based on three levers:

1. We engage suppliers to calculate their footprint, create a carbon reduction roadmap and communicate publicly about their commitments. Together with suppliers, we can make a greater impact.
2. For our own-brand local fresh supply chains, we work closely with farmers and stakeholders, to inspire and share best practices on feed composition, manure management, livestock digestion and

fertilizer usage. We have launched several pilots in livestock farming and agricultural cultivation to explore different reduction methods.

3. Finally, we are working on different projects to inspire consumer behaviour towards a more plant-based diet and adapt to increasing EU legal requirements for deforestation-free raw materials in our chain (EUDR*) and improved packaging and circularity (PPWR**).

"Retailers can contribute, but they cannot exert total control."

Els Bedert, EuroCommerce



Can you walk us through how this translates into concrete Scope 3 action on an operational level?

Inge De Paepe, Delhaize:

We chose to work with suppliers that share our values and ask them to commit to Science Based Targets. We have a differentiated approach per type of suppliers.

- With our strategic suppliers, we have long-term commitments. We do deep dives into their supply chains. We consult them frequently, and we actually discuss each reduction initiative that they're creating.
- With our top 100 suppliers, representing about 70% of our footprint, we take more of a sensitisation role: teaching them how to calculate footprints and create roadmaps. We've been doing this for over 5 years. That's also why we launched our climate hub, so suppliers at different maturity levels can find guidance. We connect several times a year to discuss their carbon roadmaps and progress. We share best practices, but the implementation of carbon reduction, especially in their Scope 3, is the responsibility of the suppliers, meaning that they need to engage to map their own supply chain as well and engage with their suppliers.
- For our own-brand local suppliers, representing about 14% of our footprint, we work with the entire supply chain from farm to fork, with more than ten pilots at different maturity levels.

Let me give you some examples:

- Delhaize was the first retailer to launch pork product specifications with carbon footprint requirements, be it on the feed composition or the meat footprint, and we're now moving towards phase two.



- For bread, we've switched to increase our sourcing of Belgian wheat, and then the next step is to support on regenerative cultivation, where we have a collaboration with Soil Capital.
- And for full-ground vegetables we created multi-year soil health improvement roadmaps with researchers and increasing group of farmers involved in the sounding boards.

“Delhaize was the first retailer to launch pork product specifications with carbon footprint requirements”

Inge De Paepe, Delhaize



What are some standout examples of collaborative sustainability initiatives that are actually working?

Els Bedert, EuroCommerce:

For example, Belgium's Bell Beef scheme has set agreed cattle criteria across the supply chain. Retailers can then decide to source only from producers that have signed up to that scheme, making sustainability the default rather than a consumer decision. Similar approaches exist with MSC-certified fish (Marine Stewardship Council). This avoids placing the burden on consumers and ensures consistent standards. Another initiative worth highlighting is the LESS project (Low Emission Sustainable Sourcing) in France, led by FCD (Fédération du Commerce et de la Distribution) and Perifem. It focuses on collecting carbon data for products sold in stores, which is a major part of Scope 3 emissions. What makes it particularly valuable is that it is a joint initiative bringing retailers and manufacturers together behind the same goal, avoiding multiple, conflicting data requests to suppliers. This kind of movement and shared platform helps harmonise data collection and builds trust. Similar approaches are referenced in a EuroCommerce/Oliver Wyman report, such as Mondra (a footprint calculation software supported by the British Retail Consortium) which acts as a sector-wide platform that brings together the different value-chain actors focusing on methodology standardisation. These initiatives often start regionally or nationally—France, the UK, the Netherlands, and pilots in countries like Czech Republic—before expanding. Trust and partnership are essential.

Els Bedert, EuroCommerce

Inge De Paepe, Delhaize:

Delhaize, in close collaboration with Belgian farmers, launched different innovative pilots aimed at promoting more sustainable agricultural methods and reducing emissions. Through the different tracks we experienced great openness and motivation to explore and collaborate. We are learning about possible approaches, methodologies and impact measurement.

Farmers are under increasing pressure to transition to more sustainable practices and reduce these emissions. However, expecting them to find practical solutions and to bear the financial burden of this transition alone is unrealistic.

In 2017 the 'Better For' initiative was developed by Ahold Delhaize in the Netherlands, a supplier collaboration and sustainability programme. It has involved hundreds of farmers and growers across different supply chains (e.g. dairy, poultry, vegetables) in multi-year partnerships. After a couple of years this programme became open source so all players from the group or outside could join. It is now a standalone initiative in the Netherlands.

“What makes it particularly valuable is that it is a joint initiative bringing retailers and manufacturers together behind the same goal.”

Beyond goodwill, sustainability is becoming a business imperative. Where are climate impacts already hitting your supply chain(s) and how are retailers staying resilient commercially?

Els Bedert, EuroCommerce:

Yes, there is increasing awareness of sourcing risks and the need to adapt supply chains by working with suppliers and directly with farmers where direct relationships exist. Capacity building, farmer schools, and community engagement help ensure long-term sourcing. Diversified supply chains are essential, especially given geopolitical developments. Infrastructure, logistics, forecasting tools, and digitalisation also play a critical role in resilience.

Inge De Paepe, Delhaize:

I remember a case of product shortage related to mangos due to weather conditions as well as oranges and clementines when severe flooding happened in Valencia (Spain) in 2025, that required quick supplier shifts. Farmers face climate challenges, daily droughts, heavy rainfall, fires and these are increasing. This requires adapting supply chains in terms of volume, origin and timing. We believe that regenerative agriculture will make those farmers more climate resilient, but it's a long-term transition.



“We believe that regenerative agriculture will make those farmers more climate resilient, but it's a long-term transition.”

Inge De Paepe, Delhaize

Let's talk about regenerative agriculture. Everyone supports regenerative agriculture in principle but when it comes to paying the transition, who actually carries the cost?

Inge De Paepe, Delhaize:

It's a tricky one. At Delhaize we have made commitments, so we think it's important to invest time and effort to explore possibilities. We pay for research and premiums to farmers in our pilots, but these are small scale and for own-brand products. Scaling up is challenging because low-carbon products come at a premium price, especially during the transition period.

Els Bedert, EuroCommerce:

Premium pricing is one tool indeed [to mobilise suppliers and farmers], but consumers are very price-sensitive [so market players need to treat] sustainability not just as risk mitigation but as a strategic growth opportunity [for the right investments to be deployed].

We also asked Rob Bray from Wildfarmed for his perspective on this question.

Rob Bray, Wildfarmed:

Everyone [should be financing the transition]. The cost of transitioning to Regen Ag is a bit like pass the parcel. No one really wants to bear the cost. The reality is that consumers have less money, retailers have thin margins, brands are under pressure because of changes in eating habits. There's a huge cost pressure



“The cost of transitioning to Regen Ag is a bit like passing a parcel.”

Rob Bray, Wildfarmed

throughout the whole of the food system and the costs are being pushed down the value chain, onto the shoulders of the farmers. That's not sustainable - 51% of UK farmers are considering leaving the industry. How can you have a resilient food system whereby the people producing the food are not able to make ends meet. The costs need to be redistributed, involving government, financial services and water companies, for example. There are many others who have a vested interest in mitigating the impacts of climate change, and benefiting from the resilience of regenerative agriculture. It's about bringing all of this together.

Yes, consumers say they care about sustainability but price still dominates once on shelf. How much are consumers really driving the sustainable product market today?

Inge De Paepe, Delhaize:

Actually, a market research from 2024 shows that sustainability efforts, unfortunately, are not a key concern when choosing a supermarket. Additionally, some other pieces of research show that our shoppers have a lot of good intentions, but once in the supermarkets, they are not willing to pay for more sustainable products, especially in the context of inflation and reduced purchasing power. It's also not always easy to communicate about sustainability efforts in-store. Local fruits and vegetables or more sustainable packaging are the easiest to explain in relation to sustainability. We recently launched a short movie about an apple farmer, and people recognize that the sourcing is nearby and feel more connected to the product. We are also improving the packaging of our fresh herbs from hard to flexible plastic allowing a reduction of 80% plastic. Our bio vegetables are no longer separated by full plastic packaging but by using a band around the vegetables. Another pilot is live in collaboration with the six largest retailers in Belgium to move towards re-usable packaging for mushrooms. Consumers are increasingly evaluating supermarkets on sustainability, but to drive loyalty, we must have a clear message, and that remains a challenge.

Els Bedert, EuroCommerce:

Consumers make their own choices, and rightly so. Retailers can make climate-friendly products available and communicate about them, but they cannot force anyone to buy them.

“Local fruits and vegetables or more sustainable packaging are the easiest to explain when communicating on sustainability.”

Inge De Paepe, Delhaize



So if consumer demand isn't yet the primary driver, what is? Is reducing agricultural Scope 3 emissions becoming a competitive advantage or is it simply a baseline requirement for staying in the market?

Els Bedert, EuroCommerce:

Risk mitigation is part of a strategic growth opportunity, especially in food, and sustainability is fundamentally a growth opportunity. The economic incentive is clear and intertwined with business strategy. Investment in skills, IT infrastructure, and efficiency may not deliver immediate growth, but it positions companies competitively for future markets. Sustainability is essential for long-term survival. It also links strongly to supply-chain resilience, particularly in food retail. Most retailers now have sustainability strategies as part of their DNA, driven strongly from top management.

Inge De Paepe, Delhaize:

As a retailer, we have different roles to play, but it requires collaboration of multi-disciplinary teams internally as well as joining forces with our competitors to get the sector moving. Most importantly, farmers must transition sustainably without risking their livelihood. That requires fair pricing, shared measures and a shared view on how to reduce emissions. A sustainable food system can only work if farmers can make a living from it. The entire industry must move together: retailers, suppliers, producers, insurers and policymakers. No one can carry the burden alone, take the risks alone or pay for it alone. We need to act collectively if we want to make low-carbon products accessible, affordable, and scalable. That requires time and joint effort.

“A sustainable food system can only work if farmers can make a living from it. The entire industry must move together: retailers, suppliers, producers, insurers and policymakers.”

Inge De Paepe, Delhaize



Interview with Brand Retail Experts

**Regenerative is getting listed but is it breaking through?
Insights from the other side of the shelf.**

We've heard the retailer's point of view on Scope 3 targets, regenerative sourcing and the limits posed by a lack of consumer demand. For brands, the challenge seems to be more immediate: it touches upon how you get listed, stay on shelf, and build a story that resonates, when 'regenerative' still means little to most shoppers.

Rob Bray from Wildfarmed has navigated this across Tesco, Waitrose, and Ocado in the UK. Anthony Corsaro from the ReGen Brands brings a US-centric lens, working with brands across certification and retail channels.

Their insights show where regenerative is already working and what's still standing in the way.



Many retailers have net-zero commitments but what does real leadership look like when it comes to turning Regen Ag production into a commercial reality?

Rob Bray, Wildfarmed:

Most retailers are SBTi signatories with binding Scope 3 obligations. I think, generally, there's a huge awareness and desire to do the right thing: to look at how they can decarbonize their supply chains and reduce emissions. But we have a long way to go to make Regen Ag the norm on supermarket shelves. The biggest unlock is consumer understanding and confidence in substantiated nature-based claims that don't fall foul of greenwashing rules. That requires high integrity data and traceable supply chains. Large CPG companies like Nestlé are leading through significant commitments to regenerative agriculture to address climate and supply-chain resilience. Many retailers also have major commitments around decarbonization and nature-positive supply chains. Change is definitely starting in how food is coming to market.

Anthony Corsaro, ReGen Brands:

I think a lot of retailers will make the business case like they did with organic—treating it as something that simply has to be part of their assortment because it's the latest trend and it has this emerging profile around awareness and demand.

“The biggest unlock is consumer understanding and confidence in substantiated nature-based claims that don't fall foul of greenwashing rules.”

Rob Bray, Wildfarmed

What I would ask retailers is what are they going to do for consumer demand and awareness and promotion? The retailers would ideally recognize they're gatekeepers and help move regen from fringe to mainstream. Right now retailers like Whole Foods are doing a good job prioritizing this in assortment decisions and in purchasing decisions which is great. That has real benefits. And I think they need to take responsibility to do two other things. First, figure out what the upper limit of consumer awareness and demand is by working with the various brands and products that carry those claims. Second, get way more invested in making sure that those brands and products are more economically successful in some way, shape or form, beyond just assortment prioritization. Those brands have to move off shelf. They have to get more money back to the farmers. If the retailer's only role is choosing to carry a regenerative product over a peer product that has similar attributes, it's not going to be enough to really make regenerative products a meaningful percentage of the assortment.



How far is regenerative from becoming mainstream and what's holding it back?

Rob Bray, Wildfarmed:

Regen Ag is not yet a new standard. It's still not well understood by customers, however, awareness has increased massively: four years ago, we did a survey, where people were asked if they knew about regenerative agriculture. The result was 1 in 500. We reran the study last year (2025), and found it was 1 in 5. So in terms of consciousness and consumer awareness around the term, it's obviously massively increasing. Regardless, if they don't know the term Regen Ag they do know and care about having birds and bees in the fields and rivers they can swim in.

Anthony Corsaro, ReGen Brands:

ROC (Regenerative Organic Certified) is probably doing the best job at creating demand for regenerative products. But interestingly, most certification schemes haven't delivered on their promises to deliver clear ROI with consumers. Many have made inroads to earn preferential treatment from retailers for products carrying their seal; however, the certifiers haven't helped a lot with consumer engagement. The many different regenerative certifications have created a fragmented landscape. No one is telling a unified narrative that helps consumers understand at a high level what regenerative is, why it matters to them, and how they can implement it into their purchasing decisions.

We really need third-party organizations like the Regen Brands Coalition, Whole Foods, and other retailers to step in and provide clear direction. If we don't do this together, it's not going to work, as it's too hard for consumers to understand. And if we're worried about greenwashing, we're definitely not going to prevent that by all the smaller players acting individually.

“Regardless, if the consumers don't know the term Regen Ag, they do know and care about having birds and bees in the fields and rivers they can swim in.”

Rob Bray, Wildfarmed



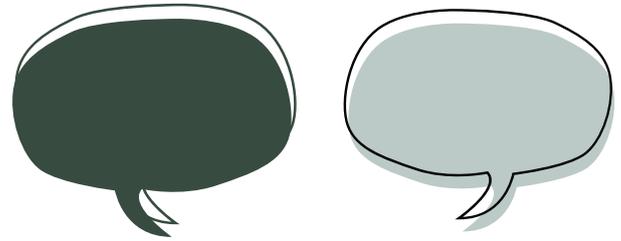
Once a regenerative brand gets listed, what does it take to actually succeed from in-store promotion to consumer storytelling?

Rob Bray, Wildfarmed:

People buy on brand and we always say sustainability doesn't need to be a drag. Retailers have strongly supported us with visibility in-store and we're now in about seven places in-store across categories including bread, drinks, cereal bars and beer. Retailers are increasingly tuned into on regenerative, but it's not the lead message. Quality and deliciousness are a top priority, and in the bread category we are proud to be a vibrant brand that deliberately stands out.

Anthony Corsaro, ReGen Brands:

That's true, there's no huge difference in the way that a regenerative brand works with a retailer than a regular brand does. It tries to get on shelf, to have the product promoted in store and get the product sold. It just happens to be regenerative and the other ones aren't. There's very little promotion occurring to promote regen brands in retail. That's a big problem. Some regenerative SKUs get preferential treatment in terms of getting to shelf, but there's really not been a lot of promotion about the fact that products are regenerative. And there's definitely not been any unified group promotion across stores that would unite various different types of regenerative certification or claims under one unified approach to consumers. The challenge is that we have a super disjointed and fragmented certification landscape, where regenerative products and claims come to life at retail in vastly different ways based on the individual store and retailer. There are many great regenerative brands, but I wouldn't say they are great brands because they are regenerative.



They are just great brands that happen to be regenerative and properly use that to differentiate in their category in a meaningful way. Ex: Force of Nature is a super cool brand, and they source regeneratively which I think consumers sort of understand. To them, I think it basically just means the meat is cleaner and healthier for them and their family. The brand has translated regenerative sourcing into some sort of easier to understand, more familiar and stickier story for you as an individual consumer that has to do with Regen. Their customers are not telling the other moms in the neighborhood that Force of Nature is Regen, and they should buy it because of that. They wouldn't necessarily know what that means, and their peers wouldn't know either. There are all sorts of anecdotal success examples of individual brands and products, but no one has done any sort of uniform, harmonized, cooperative scaled marketing and consumer education across the industry here in the US. What has done more for the awareness of regenerative agriculture and regenerative products than anything else are the documentaries Kiss the Ground ([LINK](#)) and Common Ground ([LINK](#)). They have nothing to do with certifications, or individual brands and product stories, but are cultural projects getting people to understand the term Regen and gaining awareness of it.

Rob Bray, Wildfarmed:

Yes, if your product isn't excellent, no one's going to buy it. Retailers won't list something that isn't excellent, and customers need to recognize it as a high-quality or premium product. For us, we knew that anything we launched had to be top quality, even if we're trying to remain accessible from a price point.

So regenerative claims don't actually help you get listed?

Rob Bray, Wildfarmed:

No, not on their own. There are definitely people who are buying because it's regenerative, but many others are buying because it's a delicious and quality product.

Anthony Corsaro, ReGen Brands:

Exactly. Regen Ag claims may help to get you listed in a store, but what I'm really leery of in this space is people that sell you the 20% and ignore the 80%. And the 80% is the same whether you're regen or not: taste, price, and health. Regen is just another thing that's going to be a little bit of an extra plus once you nail that first 80%. That's way more important. So what I would give advice to if you have a regenerative brand or products, is find a way to turn that into some sort of differentiation—and that's really going to be category and product dependent. What that story and that differentiation looks like for Wildfarmed is going to look really different than what it looks like for Force of Nature or for Little Sesame or for Dr. Bronner's. In the US people buy everything in categories. For example, if I'm a mom of three, I'm walking the aisle and I'm looking at all the nut butters. So how you translate Regen into that individual decision is much different than ice cream or coffee or beef or crackers. My biggest piece of advice is to figure out what's the real true value of that integrated into your marketing from a retention and a loyalty perspective, not from a primary purchasing driver perspective, and find a way to add value to your business via that.



“If you have a regenerative brand or products, find a way to turn that into some sort of differentiation—and that's really going to be category and product dependent. ”

— Anthony Corsaro, ReGen Brands

Everyone is waiting for science to connect regenerative farming to measurable health benefits. What's actually missing and how close are we to making that connection?

Rob Bray, Wildfarmed:

Health benefits really matter. If we can help consumers connect the dots between better farming and their own health, that's a huge opportunity. Making that link clear could drive demand. But it will probably take several years to be widely accepted. It's early stages but there is encouraging research that crops in regen fields have higher levels of things like polyphenols or antioxidants. Health has the opportunity to be a major driver for scaling regenerative agriculture. If people were able to understand and appreciate the benefits of regenerative systems on their own health and the benefits to nature and to the climate, then the opportunity for rapid scaling would be immense.

Anthony Corsaro, ReGen Brands:

I agree that it will take at least a decade or maybe multi-decades to prove this out in a scaled and affordable way. There are three linked but independent steps to reach a situation of Regen Ag equals nutrient density equals consumer demand. First is the science, trying to figure that out - how we actually test the food and get the data.

That's going to take a long time because all product forms need to be tested: final ingredient, fresh off the farm, etc. Huge datasets must be developed. Then there's the codification piece and there are various ways it could be plugged into new certifications or existing certifications. There are some lanes for how we could codify that into product packaging and product marketing. But ultimately, I think for it to be this revolutionary thing, none of those existing lanes is going to be the lane that would move that needle. So are we legit pricing food per nutrient, per weight, per calorie or some other metric? Will we totally change the way that food is merchandised in stores to feature that information on the shelf instead of on the package? There's this entire codification project of once you have the science, how do you actually translate it into designing a product, packaging a product, selling it out of the store, selling it online. And then there's the massive trial and error of actually taking whatever the science gets codified into to consumers and figuring out what works, what doesn't work, what will never work, what has potential but we need to adjust."

"Health has the opportunity to be a major driver for scaling regenerative agriculture."

Rob Bray, Wildfarmed





Thank you for navigating the aisles of today's retail with us.

Thank you to Inge De Paepe, Els Bedert, Rob Bray, Anthony Corsaro for taking the time to answer our questions.

Any questions?

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