NIQ Perspectives

Food & Beverage

March 2, 2026

Good for you, built for the planet

"Regenerative agriculture is rapidly becoming a growth and risk story at the same time—premiumization when it's proven, vulnerability when it's vague. What's being underestimated is how fast consumers are collapsing sustainability, food quality, and chemical exposure into a single judgment of trust. If the industry treats regen as a marketing layer instead of an operating standard, it will quickly become a source of skepticism rather than differentiation."

Chris Costagli

Vice President, Thought Leadership F&B Insights Lead, NielsenIQ

Did you know…

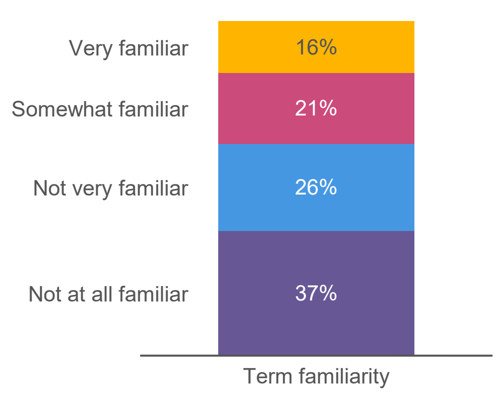
- Despite financial insecurity, SNAP users are **2.1x more likely** to be willing to pay a higher price for sustainably produced foods and beverages[3]
- GLP-1 users are **2.4x more likely** to be willing to pay a higher price for sustainably produced foods and beverages[3]
- Households with children and teenagers are **1.9x more likely** to feel very familiar with what regenerative agriculture means, and these households perceive the benefits to be higher quality and more nutritious food[1]

Implications for the Food & Beverage Industry

Awareness is low, narrative control is open

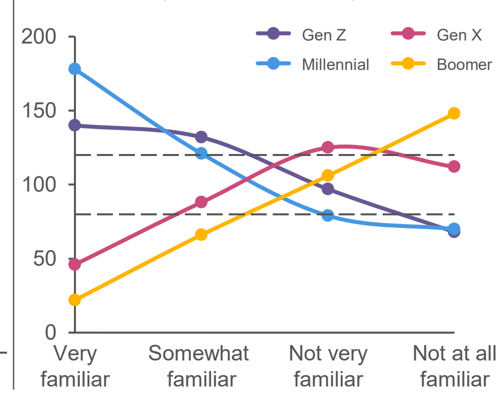
At 37% familiarity, regenerative agriculture is a definition-stage opportunity—education is the growth lever, not "more claims." Younger consumers lead familiarity, giving the industry a window to shape meaning before assumptions harden and misinformation fills the gap. The fastest path to scale is not storytelling, but simple, repeatable language and proof points that translate farm practices into outcomes shoppers can understand, trust, & act on.

FAMILIARITY WITH THE TERM REGENERATIVE AGRICULTURE[1]



TERM FAMILIARITY, BY GENERATION[1]

(INDEXED TO TOTAL RESPONDENTS)

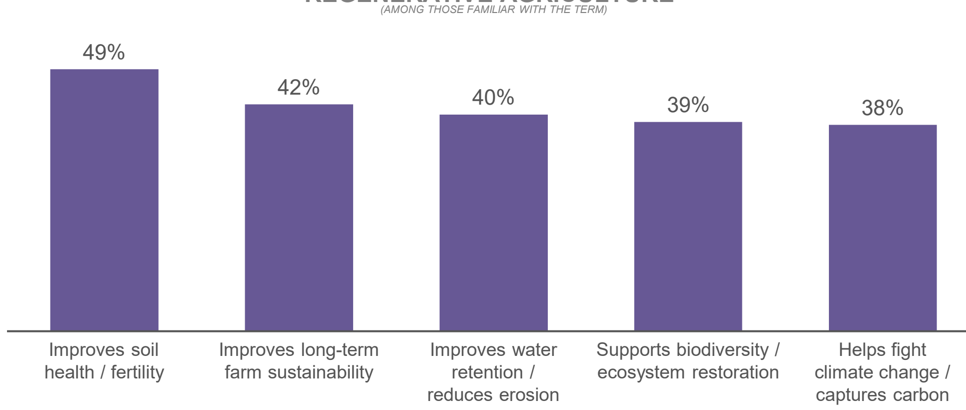


Fuse planet outcomes with human outcomes for a powerful story

Consumers intuitively connect regenerative agriculture with soil health and long-term sustainability, but the deeper story is just beginning to surface. Nearly 1 in 3 already believe regenerative practices lead to higher-quality, more nutritious food—a powerful bridge between planet health and personal health. That positioning supports premiumization when backed by proof. As benefits become clearer, regeneration shifts to a value creation story.

TOP 5 PERCEIVED BENEFITS OF REGENERATIVE AGRICULTURE[1]

(AMONG THOSE FAMILIAR WITH THE TERM)



Industry Analysis Sources: [1]NIQ, BASES Quick Question Omnibus Survey, n=1,006, September 2025; [2]NIQ, Retail Measurement Services, Powered By Product Insights, Total F&B + Non-UPC, Total Food & Beverage, Total US Full View, 52-Weeks Ending 1/24/2026; [3]NIQ, BASES Quick Question Omnibus Survey, n=2,029, February 2026; [4]NIQ, Retail Measurement Services, Powered By Product Insights, Total Food & Beverage, Total US Full View, 52-Weeks Ending 2/21/2026

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The takeaway…

- Retail shelves are entering a credibility era where verification becomes a growth lever, not a compliance cost.
- Low awareness of regenerative agriculture means the market is still definable; delay cedes control of the narrative.
- Collaboration between retailers and manufacturers is becoming mandatory to avoid fragmentation in regenerative agriculture claims, positioning, and assortment.

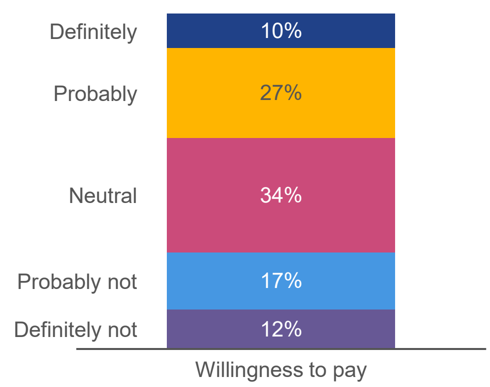
Your next move…

- Make regenerative agriculture mainstream; expand beyond niche SKUs into hero items people actually buy weekly
- Manufacturers should build a proof stack of third-party verification, outcome reporting, and simple front-of-pack translation to drive awareness, solidify trust, and empower shoppers.
- Retailers should prioritize making regen products discoverable through clear shelf language, dedicated space, and online filters using standardized characteristics (i.e., Sustainable Fishing).

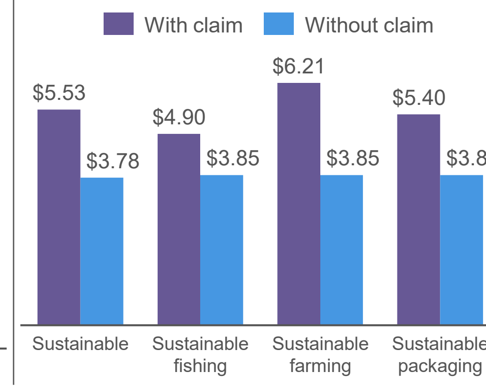
Premiumization and sustainability are converging strategies

More than one-third of consumers are willing to pay more for sustainably produced food, signaling that price is not the ceiling many assume. Regenerative products demonstrate that consumers will accept higher prices when value is transparent. This positions regeneration as a margin lever, not a niche. Sustainable products need merchandising parity with mainstream brands, but sustainability must deliver mainstream performance.

WILLINGNESS TO PAY FOR SUSTAINABLY PRODUCED F&B[3]



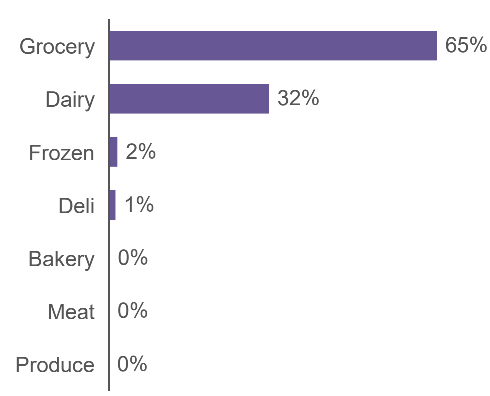
AVERAGE UNIT PRICE COMPARISON, STATED CLAIM VS. NO CLAIM[4]



Glyphosate and chemical anxiety

Glyphosate sits at the intersection of agriculture, regulation, and consumer trust, making it a material risk factor. More than a third of consumers associate regenerative agriculture with reduced reliance on synthetic pesticides, at the same time, "Free From Glyphosate" sales already represent hundreds of millions of dollars, concentrated in everyday categories like Grocery and Dairy. Glyphosate concerns will increasingly re-shape trust.

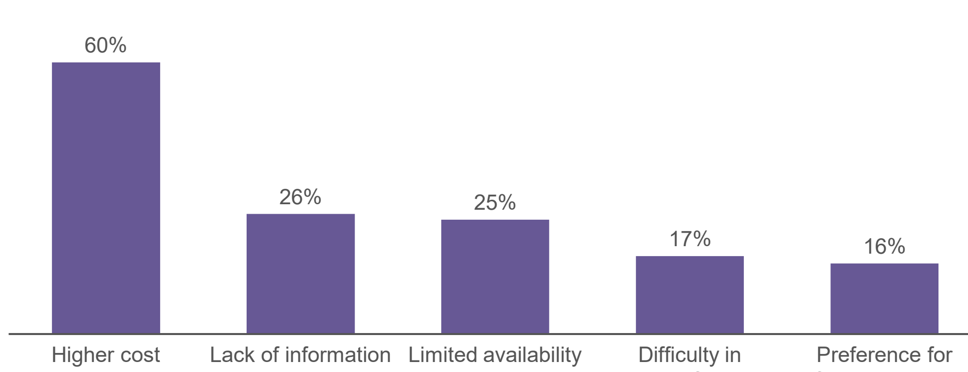
F&B DOLLAR SHARE OF STATED "FREE FROM GLYPHOSATE" CLAIMS[2]



Convert intent by engineering discovery

Consumers say cost is the barrier, but behavior tells a different story: the real obstacle is complexity. Shoppers struggle to identify sustainable products and understand what claims actually mean. Manufacturers must lean into attributes that drive intent, while retailers must remove structural barriers across assortment and navigation. Those gaps represent untapped growth; companies that fix discovery will unlock latent demand.

TOP BARRIERS TO PURCHASING SUSTAINABLY PRODUCED FOOD & BEVERAGES[3]



Questions?

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Regenerative agriculture is moving from ideology to economics: the combination of premium willingness and regen claim performance signals a durable mix shift opportunity. But scaling the opportunity requires eliminating the consumer friction that blocks conversion—information gaps, identification difficulty, and inconsistent in-store support. In the future, the FMCG Industry should expect regenerative practices to increasingly function as a supply-chain requirement, a brand differentiator, and a risk-management lever.

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