

REGENERATIVE AGRICULTURE

Australian State of Play

EXECUTIVE SUMMARY



EXECUTIVE OVERVIEW

Agricultural Innovation Australia Ltd (AIA) and the SAI Platform Australian Chapter both have regenerative agriculture (RA) as one of their key strategic areas of focus. The two organisations collaborated to examine the State of Play of regenerative agriculture (RA) in Australia.

The study, undertaken by STR Consulting and ERM, broadly maps the RA landscape, including existing organisations, certification schemes, commitments, and systems that self-identify as RA in Australian agriculture, fisheries and forestry value chains, and considers the relationship between RA and:

- the wider corporate sustainability and environmental, social and governance (ESG) investment landscape
- potential future regulatory and export requirements for Australian agriculture.

The study is being used by both organisations for internal strategic development purposes, but the following overview informs external stakeholders about the key themes and implications from the perspective of AIA and SAI Platform Australia.

It identifies key opportunities to address challenges and provide positive alignment across industries and aims to assist in developing a whole-of-industry approach to RA, including potential cross-sectoral investments in RA initiatives.

What is the context for the work?

The RA movement has rapidly grown in prominence over the last decade. Those who advocate for RA point to severe environmental degradation associated with conventional systems. Their solutions involve developing agriculture, forestry and fisheries systems that build natural capital and increase resilience, while producing food and fibre.

This research documents the definitions, actors, drivers and systems at work, as well as comments on the current challenges and practices in Australian agriculture. It aims to contribute to the broader discussion and does not make judgements as to whether RA is a good or bad development. It maps RA against other approaches to sustainability and provides information on the opportunities and challenges in the RA space.



What does regenerative agriculture mean?

The RA community is diverse and decentralised, capturing multiple commodity types and with different philosophies co-existing in various degrees of harmony and discord. An array of RA methodologies and systems have been developed, and the research focussed on cataloguing projects and initiatives that explicitly use the language of regenerative agriculture, fisheries or forestry. There are also schemes and programs that adhere to one or more RA principles without self-identifying as regenerative, including some investments and research undertaken by Research and Development Corporations (RDCs).

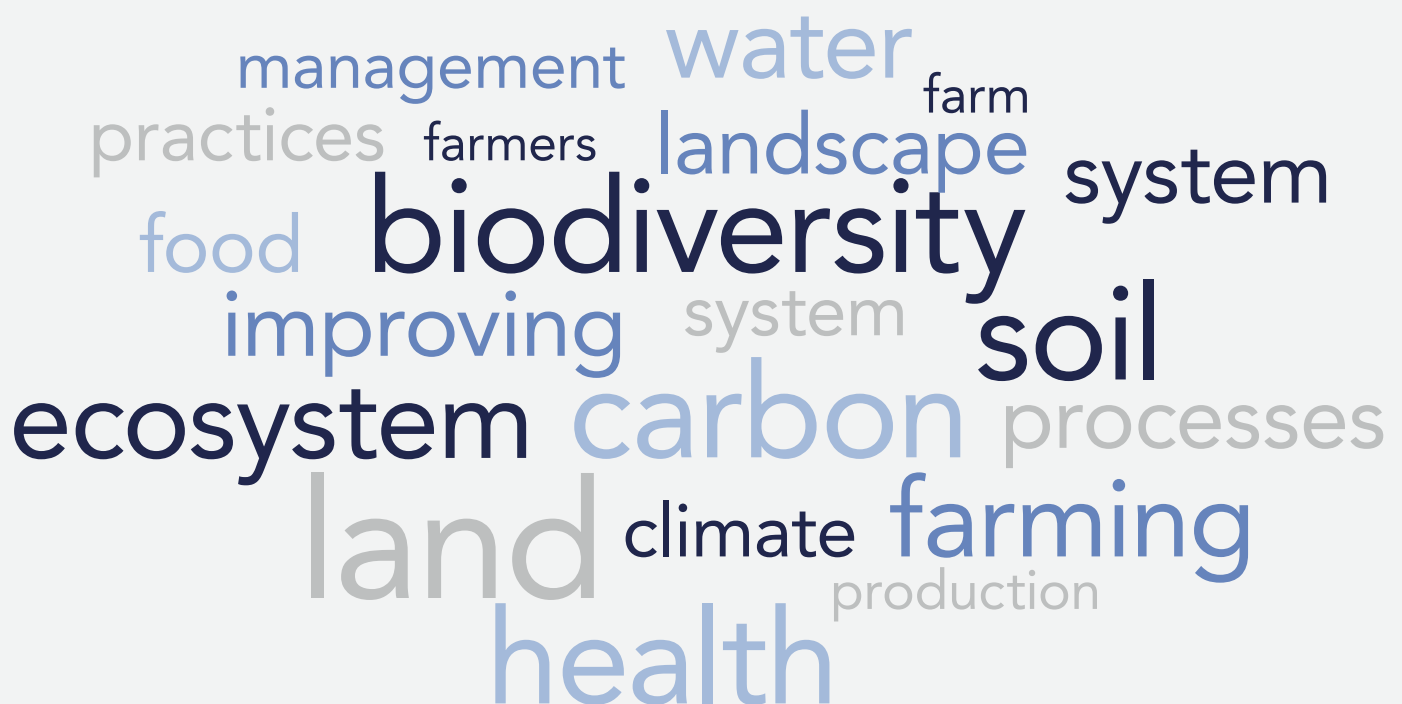
Whilst there is currently no consensus regarding the definition of 'regenerative', there is general agreement on some key elements of RA. Specifically:

- RA systems improve the health of the soil and broader terrestrial and aquatic landscapes, which will in turn promote improved human health via the production of nutritious food.
- RA is outcomes-focussed and RA systems should be in a state of continuous, measurable ecological improvement.
- Specific management practices will vary according to context.

The Global SAI Platform recently launched the Regenerating Together framework. The definition used by this framework encompasses the major themes of RA and could be used as the basis for a consensus definition in the context of Australian agriculture:

“An outcome-based farming approach that protects and improves soil health, biodiversity, climate, and water resources while supporting farming business development.”

Most common words from a list of 31 definitions of regenerative agriculture



What are the drivers of regenerative agriculture?

Consumer interest in RA is growing rapidly and global food brands are adopting RA language in their procurement and communication activities. There is a clear opportunity for commercial RA-based initiatives to cater to growing consumer expectations.

Regulators and providers of capital, while interested in RA, tend to focus their efforts on a small number of specific RA elements and techniques such as reductions in greenhouse gas emissions, soil improvement or increased ground cover, which lend themselves to direct measurement, verification and offset markets.

In the short term, there are no known, specific export-related requirements for Australian agriculture that explicitly refer to RA. However, this may change as trading partners, like the EU, introduce domestic regulations in areas such as soil health, and if commercial parties come to require regenerative practices on the part of suppliers.



Certifications

The lack of consensus on a definition of RA presents a risk of greenwashing and a challenge to other actors becoming more actively engaged in RA more broadly. However, there is an opportunity to manage these risks.

Emerging RA certification schemes adhere to the philosophy of improvement, with most incorporating assessment metrics that consider ecological outcomes rather than solely assessing management practices. Global brands appear to have less stringent requirements for producers to be considered regenerative than most independent certifications.

Scheme	Industries covered	Operating or available in Australia	Landscape health outcomes	Biodiversity	Carbon sequestration	Mandated management practices	Animal welfare	Social welfare	Economic viability
SAI Platform's Regenerating Together Framework	Crop, dairy and beef farmers	✓	✓	✓	✓	✗	✗	✗	✓
Land to Market <i>landtomarket.com.au</i>	Livestock	✓	✓	✓	✓ ✗	✗	✗	✗	✗
Regenerative Organic <i>regenorganic.org</i>	Farmers, buyers and processing	✓	✓	✓	✗	✓	✓	✓	✗
Demeter Biodynamics <i>demeter.net</i>	Farms, processing	✓	✗	✓	✗	✓	✓	✓	✗
Certified Regenerative by AGW <i>agreenerworld.org</i>	Farms, buyers, processing	✗	✓	✓	✓	✓	✓	✓	✓
Regenified <i>regenified.com</i>	Livestock	✗	✓	✓	✓	✓	✗	✗	✗
Soil Carbon Initiative <i>soilcarboninitiative.org</i>	Farms, supply chain	✗	✓	✓	✓	✓	✗	✗	✗
Regen1 <i>greenbrownblue.com/regen1</i>	Farms	✗	✓	✓	✗	✗	✗	✓	✗
Regenagri <i>regenagri.org</i>	Farms, supply chain	✓	✓	✓	✓	✓	✓	✓	✗

However, this is likely to change as regulators examine product-related claims using RA language. Some brands do not disclose their measurement methodology publicly, leading to criticism by RA proponents. Other schemes require farms to achieve benchmark scores, but do not require continuous improvement.

Global SAI Platform's Regenerating Together framework impact areas.

Impact area	Material criteria
Soil Health	– Soil erosion – Soil organic matter – Aggregate structure/texture – Nutrient management
Water	– Aquifer overuse – Surface water overuse – Water nutrient loading – Water sediment loading
Biodiversity	– Habitat connectivity – Deforestation – Plant species diversity – Livestock diversity
Climate	– Nitrogen use – Energy use

The opportunity for collaboration

There are significant opportunities for Australian agriculture, aquaculture, fisheries and forestry to collaborate in the RA space.

The use of RA practices in Australian agriculture varies by sector and region. However, there are practices identified as common across multiple RA programs which are also common in Australian agriculture.

Grassfed livestock, crop rotation, use of cover crops and reduced tillage are all common practices in Australia already, which positions Australia well relative to some other countries under those programs.

Some stakeholders believe the RA movement is divisive because it implies that primary producers who do not use the label are, by implication, degenerative. Also, producers who would consider a shift to RA methods are confronted by “opposing education systems”.

On one side are conventional agronomists and academia, whose advice often focusses on using chemistry to solve problems. On the other side are RA practitioners and educational organisations, whose advice is more focussed on using biology and natural processes to improve production landscapes.

These groups may give conflicting advice to producers, which leads to confusion and may hinder uptake of RA.

However, there is more commonality in the outcomes being sought by the RA movement's proponents than the terminology used to define RA. As such, it is important for Australian agriculture to focus on the agricultural and ecological work that must be done and get past differences in terminology. There is an opportunity for stakeholders to come together in order to find this middle road. Another key opportunity in RA is the encouragement of collaboration between producers of different products. These partnerships can provide economic and ecological synergies, whereby producers increase profitability while simultaneously improving and regenerating natural capital. Strategic facilitated discussions between stakeholders across diverse industries has the potential to uncover mutually beneficial outcomes.

Stakeholders also say the funding landscape for RA projects needs to change, to better allow producers and investors to form partnerships. Opportunities for scaling RA may also come from novel, synergistic partnerships between producers. For example, cattle grazing in pine plantations, pastured poultry production on broadacre wheat farms, or integrated systems of aquatic plant and seafood production.

Finally, by focusing on the intended outcomes of RA, there is also potential for further collaboration in the exploration and consideration of linkages within broader sustainability action arenas.



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