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Regenerative Agriculture and Soil Carbon Market Forecasts to 2032 – Global Analysis By Practice Type (Cover Cropping, Crop Rotation, Agroforestry and Composting and Organic Amendments), Farm Type, Technology, Deployment Model, Application, End User and By Geography

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Abstracts

According to Stratistics MRC, the Global Regenerative Agriculture and Soil Carbon Market is accounted for $15.0 billion in 2025 and is expected to reach $49.7 billion by 2032 growing at a CAGR of 18.7% during the forecast period. Regenerative agriculture is a holistic farming approach focused on restoring and enhancing soil health, biodiversity, and ecosystem resilience. It emphasizes practices such as cover cropping, crop rotation, reduced tillage, composting, and agroforestry to improve soil structure and fertility. Soil carbon refers to the organic carbon stored in soil, which plays a vital role in nutrient cycling, water retention, and climate regulation. By increasing soil carbon through regenerative methods, farmers can sequester atmospheric CO?, mitigate climate change, and boost long-term productivity. Together, regenerative agriculture and soil carbon management offer a sustainable path toward resilient food systems and environmental stewardship.

Market Dynamics:

Driver:

Climate Change Mitigation

Climate change mitigation is a major driver of the regenerative agriculture and soil

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carbon market. As global temperatures rise and carbon emissions intensify, regenerative practices offer a scalable solution to sequester atmospheric CO? through improved soil health. Governments, corporations, and farmers are increasingly adopting these methods to meet sustainability goals and reduce environmental impact. This shift is accelerating investment in soil carbon initiatives, positioning regenerative agriculture as a critical tool in climate resilience strategies.

Restraint:

High Initial Costs

Despite its long-term benefits, regenerative agriculture faces a key restraint in the form of high initial costs. Transitioning from conventional farming requires investment in new equipment, training, and soil restoration techniques. Many small and medium-sized farmers struggle to afford these upfront expenses, especially without guaranteed returns or market incentives. This financial barrier slows adoption rates and limits scalability, particularly in developing regions where access to capital and technical support remains limited.

Opportunity:

Consumer Demand for Sustainable Food

Rising consumer awareness around sustainability and ethical sourcing presents a significant opportunity for the regenerative agriculture market. Shoppers increasingly prefer food grown using environmentally friendly methods that promote soil health and biodiversity. This demand is influencing retailers and food producers to source from regenerative farms, creating new revenue streams and brand differentiation. As transparency and traceability become market expectations, regenerative agriculture is well-positioned to meet evolving consumer values and drive premium pricing.

Threat:

Knowledge Gaps & Resistance to Change

A major threat to the market is the persistence of knowledge gaps and resistance to change among traditional farmers. Many are unfamiliar with regenerative techniques or skeptical of their effectiveness, especially in regions where conventional practices dominate. Lack of access to education, technical support, and peer success stories

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further compounds the issue. Without targeted outreach and training, adoption remains slow, hindering the market's growth potential and delaying environmental benefits.

Covid-19 Impact:

The COVID-19 pandemic disrupted agricultural supply chains and exposed vulnerabilities in global food systems. While it temporarily slowed field operations and investment, it also heightened awareness of sustainable and resilient farming practices. Regenerative agriculture gained traction as stakeholders sought long-term solutions to food security and climate challenges. Post-pandemic recovery efforts have included renewed interest in soil health, carbon markets, and decentralized farming models, positioning the sector for accelerated growth in the coming years.

The crop rotation segment is expected to be the largest during the forecast period

The crop rotation segment is expected to account for the largest market share during the forecast period due to its proven benefits in enhancing soil fertility, reducing pests, and improving yield sustainability. By alternating crops seasonally, farmers can naturally replenish nutrients and break disease cycles without relying on synthetic inputs. This practice is widely adaptable across geographies and farm sizes, making it a cornerstone of regenerative systems. Its scalability and effectiveness contribute to its leading market share.

The carbon credit trading segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the carbon credit trading segment is predicted to witness the highest growth rate as governments and corporations seek to offset emissions, demand for verified soil carbon credits is surging. Regenerative practices that sequester carbon offer farmers a new revenue stream through participation in carbon markets. Advancements in measurement, reporting, and verification technologies are making these credits more accessible and reliable, driving rapid expansion and investor interest in this segment.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share because of rising food demand, climate vulnerability, and government-led sustainability initiatives. Countries like India, China, and Australia are investing in

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regenerative techniques to combat soil degradation and improve agricultural resilience. The region’s large farming population and expanding digital infrastructure support rapid adoption. As awareness grows and pilot programs succeed, Asia Pacific is poised to become a major growth engine for the market.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR owing to strong policy support, advanced agricultural infrastructure, and growing corporate sustainability commitments. The U.S. and Canada have seen increased adoption of regenerative practices, backed by government incentives and private sector investment. The region’s robust carbon trading frameworks and consumer demand for sustainable food further reinforce its leadership position, making it a hub for innovation and scale.

Key players in the market

Some of the key players in Regenerative Agriculture and Soil Carbon Market include Indigo Ag, Cargill, Bayer AG, PepsiCo, Nestl? S.A., Unilever, Danone S.A., General Mills, Corteva Agriscience, Regrow Ag, Soil Capital Ltd., Nori, South Pole, BASF SE and Agreena.

Key Developments:

In July 2025, BASF and Equinor have inked a ten-year strategic partnership in which Equinor will supply up to 23 terawatt-hours annually of natural gas (c. 2 bcm) to BASF across Europe, starting October 2025, underpinning BASF’s energy supply and sustainability goals.

In June 2025, BASF Coatings and Toyota Motor Europe have signed a strategic agreement to launch the Toyota Body&Paint program across Europe, leveraging BASF’s Glasurit and R-M refinish brands plus digital solutions like Refinity and Body Shop BOOST.

Practice Types Covered:

- Cover Cropping
- Crop Rotation

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- Agroforestry
- Conservation Tillage
- Managed Grazing
- Composting and Organic Amendments

Farm Types Covered:

- Row Crops
- Perennial Crops
- Livestock Farms
- Mixed Farms

Technologies Covered:

- Remote Sensing and GIS
- Soil Health Monitoring Sensors
- Carbon Sequestration Modeling Tools
- Blockchain for Carbon Credit Tracking
- AI and Data Analytics Platforms

Deployment Models Covered:

- On-Premise
- Cloud-Based

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Applications Covered:

- Food and Agriculture Production
- Bioenergy and Biofuels
- Carbon Credit Trading
- Research and Development
- Soil Health Improvement

End Users Covered:

- Farmers and Cooperatives
- Agribusiness Companies
- Carbon Trading Companies
- NGOs and Research Institutions
- Government Agencies
- Research Institutions

Regions Covered:

- North America
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  - Canada
  - Mexico

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Qatar

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Rest of Middle East & Africa

What our report offers:
- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2022, 2023, 2024, 2026, and 2030
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

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Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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