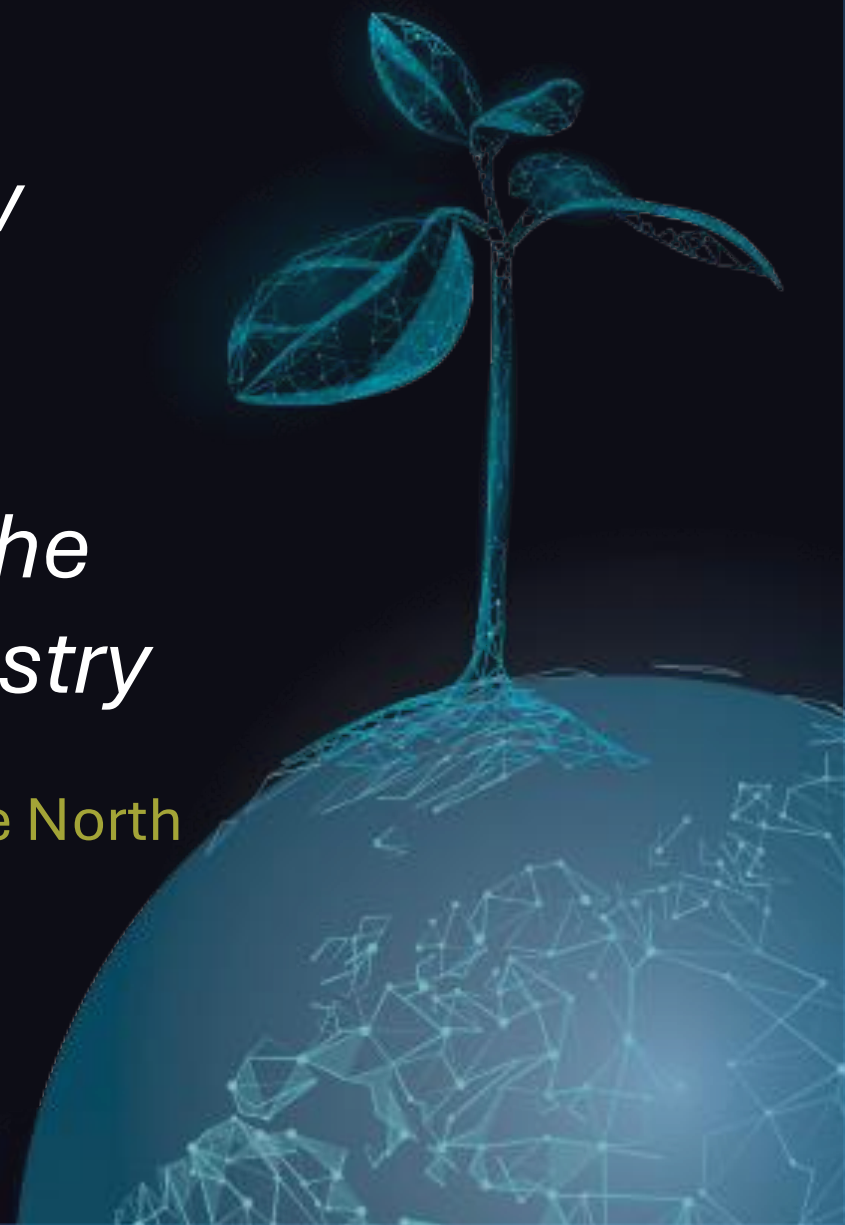




*From Soil to Strategy. How
regenerative farming,
carbon removals and LCA
are shaping the future of the
pome and stone fruit industry*

Eddie Vienings & Malissa Murphy | Blue North



HORTGRO TECHNICAL SYMPOSIUM, 2026

From Soil to Strategy

How regenerative farming, carbon removals and LCA are shaping the future of the pome and stone fruit industry

Eddie Vienings, Blue North Sustainability



BLUE NORTH

THINKING. FUTURE

Contents

- Two trends
- The drivers
- The evidence
- Implications for strategy



Contents

- **Two trends**
- The drivers
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There are two trends of change

They signal significant shifts in the way farming is being done and how assurance is achieved.



ON THE FARM
(BOTTOM UP)

The regenerative trend

Farms are shifting from systems fuelled by fossil inputs to systems powered by the sun - leveraging the natural, self-regulating capacity of healthy ecosystems.



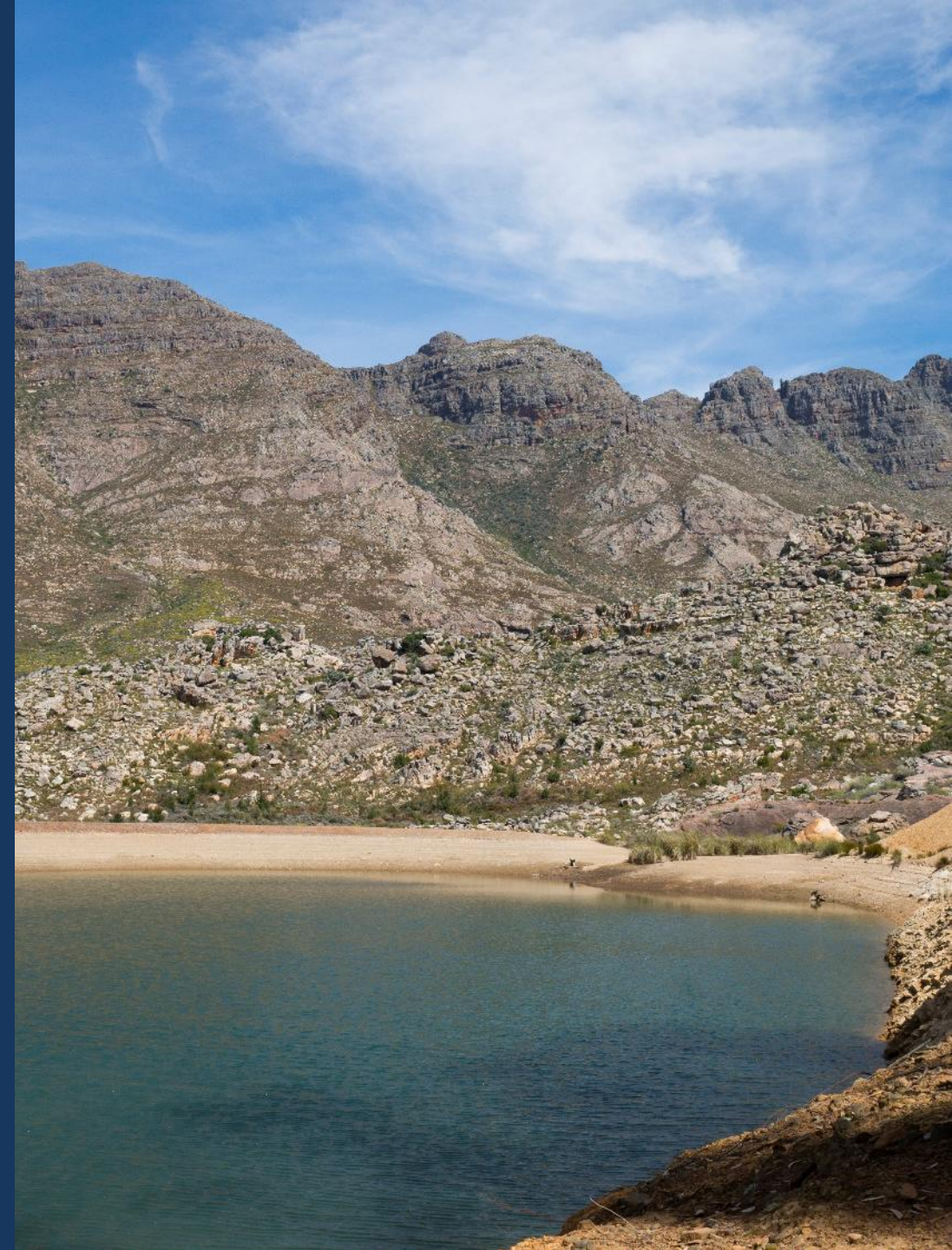
IN THE MARKET
(TOP DOWN)

The measurement trend

Buyers, regulators and other stakeholders increasingly want verified measurement of impact - and they're prepared to act on the numbers.

Contents

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There are distinct forces behind these two trends

Each is being independently motivated, triggered and driven





ON THE FARM
(BOTTOM UP)

The regenerative trend

*The triggers motivating the transition from **conventional approaches** to **regenerative agriculture***



PUSHED BY

Crisis

- Prolonged drought
- Soil fundamentally depleted
- Long-term viability in doubt

We can't keep doing this.



SQUEEZED BY

Economics

- Rising input costs
- Cost-price margin squeeze
- Shrinking crop-protection toolbox

The numbers have stopped working.



INSPIRED BY

Stewardship

- Ecological health as the basis of long-term viability
- For family, workers, community and society
- The farm as more than a business

There is much more at stake than just this season.



The measurement trend

The forces pushing the market from a reliance on **standards compliance** to demanding **measurable impact**



EXPOSED BY

Credibility gap

- Snap-shot audits don't show change or impact
- No signal of continuous improvement
- Practices ticked ≠ outcomes achieved

A snapshot proves nothing.



DEMANDED BY

Real crises

- Accelerating biodiversity loss and deforestation
- Rural area socio-economic challenges
- Unabated climate change / extreme weather

Real crises need real impact with evidence.



ACCELERATED BY

Strategic need

- Real-time, dynamic, credible reporting
- Proactive risk management & and sourcing decisions
- Collaboration across the food system – address shared supply challenges

What we can see, we can influence & manage.

Contents

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There is clear evidence that both trends are gaining momentum

Based on our observations and work with clients at farm-level and in the market





ON THE FARM
(BOTTOM UP)

The regenerative trend

What we're seeing on farms...



CHANGED APPROACH

Practice

Fundamental changes on the ground

- **Cover crops & mulches** now standard on leading farms
- **Multi-species cover strategies** - more sophisticated by the season
- **Composts, compost extracts, living roots** - soil health as the priority
- **Livestock** being reintegrated into orchard systems



HOW THEY LEARN

Capability

How knowledge is deepening

- Pioneering farms investing in in-house regen expertise
- Study tours abroad, specialist soil-health courses
- Regen symposia, peer networks, scientific collaboration
- Deep, context-specific knowledge is developing rapidly



WHAT FOLLOWS

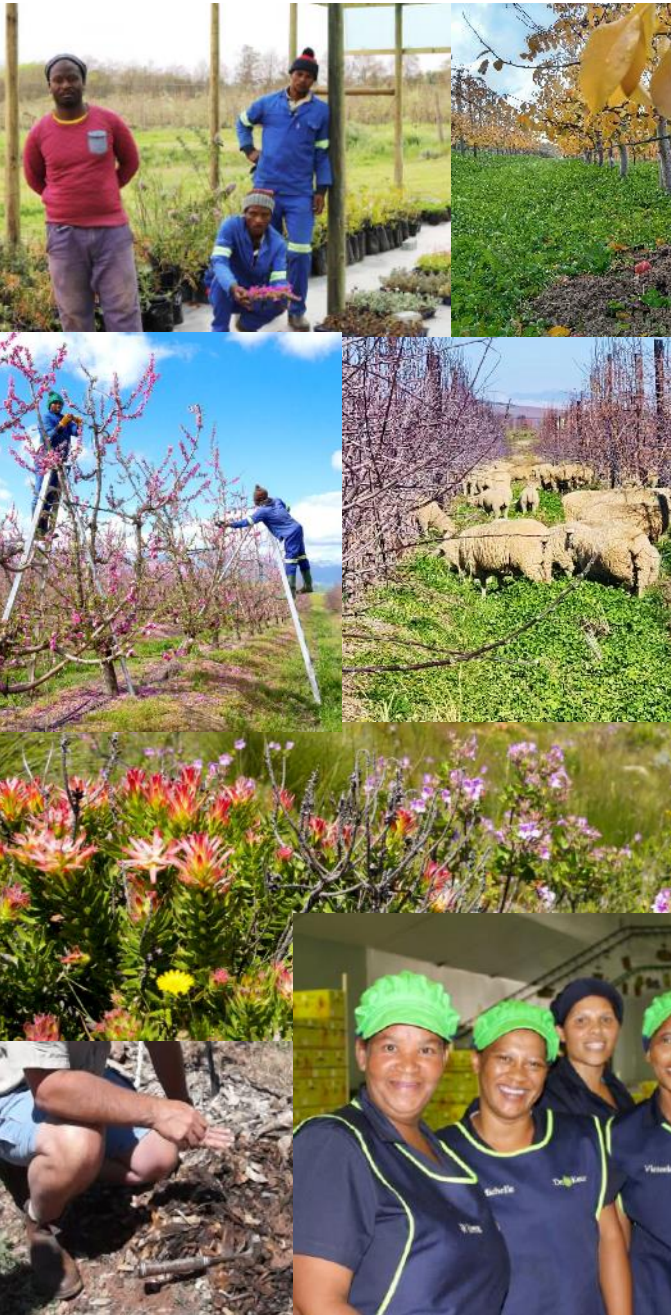
Impact

What the work is yielding

- Water-holding capacity up; less irrigation needed
- Wildlife and biodiversity returning
- Reducing synthetic inputs, chemicals & costs
- Skills and operator capability growing at every level

*Different farms, different stages - but the **transitions toward Regenerative Farming** are unmistakable and significant.*

Benefits evident on fruit farms adopting Regenerative Agriculture



Economic Impacts

↑ Long-term planning confidence

↑ Business Resilience

↑ Revenue certainty

↑ Margins / Profitability

↑ Market Access

↓ Input costs

↑ Revenue streams

Social Impacts

↑ Value to Community / Region

↑ Skills development, new roles & employment potential

↑ Security of employment over long-term

↑ Tax contribution

↓ Health & Safety Risks

↑ Business Culture / working environment

↑ Develop Ecological Literacy

Ecological Impacts

↑ Crop nutrient density

↑ Climate resilience

↓ Nutrient & chemical leaching

↑ Rainfall penetration & Water Holding Capacity

↑ Nutrient cycling & availability

↑ Soil Health

↑ Pests & diseases self-regulation

Regen Practices

✓ Maximise period of "living roots"

✓ Keep the soil surface covered – mulches and cover crops

✓ Integrate livestock into cropping system

✓ Reduce mechanical & chemical disturbance

✓ Increase diversity – farm and landscape



IN THE MARKET
(TOP DOWN)

The measurement trend

What we see the market asking for...



FROM THE MARKET

Demand

Pace of measurement requests is accelerating

- Corporate **Carbon Footprint** demand rising fast
CCF · Scopes 1, 2 & 3
- Science-Based Targets being set
SBTi · verified trajectory to Net Zero
- **Removals** accounting under FLAG, toward net zero
FLAG · Forest, Land & Agriculture guidance
- Increased requests for **outcome-based certification**
Regenified Standard; Ecological Outcomes Verification (EOV).
- More mandated **Reporting Platforms**
Mondra, Secaro, etc.



BEYOND CARBON

Scope

Measurement broadening across impacts

- From just carbon to water, biodiversity, human health etc.
via LCA · Life Cycle Assessment
- Expanding scope of product-level reporting
PEF / EPD · EU product environmental standards. Product Category Rules
- Expanding scope of Science Based approaches
SBTN – Science Based Targets for Nature – setting targets for biodiversity, water etc.



FROM RETAILERS

Data-driven Insights

From snapshot audits to live data

- Audit-based snapshots don't show trends in risk, progress, challenges, etc.
- **Dynamic data-driven dashboards** informing procurement strategies
- Enabling informed decision-making that **support resilient supply**

*The market is asking for **more credible data-driven evidence** of real impact.*

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These Trends are Converging

Seen apart, they are trends. Seen together, they can form the basis for a winning strategy.

THE MARKET DEMAND *for data-driven, credible* **MEASURED IMPACT**



ECOLOGICAL
FOUNDATION

Environmental

- Reduced reliance on synthetic chemicals
- Improved biodiversity
- Reduced carbon footprint
- Maximised carbon Removals
- Water stewardship



HUMAN DIMENSION

Social & Human

- Improved community health
- Skills development at all levels
- Meaningful career pathways



BUSINESS CORE

Business & Supply

- Long-term supply resilience
- Product quality & nutrient density
- Diversified income streams

and **REGENERATIVE AGRICULTURE** *as the system that* **DELIVER THE IMPACT**

Two trends, four strategic positions

Where you sit on this matrix tells you where your strategic attention may need to be.



Two trends, four strategic positions

Where you sit on this matrix tells you where your strategic attention may need to be.



From Diagnosis to Action

Five strategic moves for pome & stone fruit producers to consider

01



Use the matrix to frame your thinking

Where are you on the matrix today? What does that imply? Where do you aspire to be? Let the gap guide your strategy.

02



Get your baseline measurement in place

Carbon, soil, biodiversity, water... start narrower and then broaden. You can't manage, defend or promote what you haven't measured.

03



Start with the orchard floor

Introduce diversity into the monoculture. Ground covers first key step towards solar-powered orchards and soil health. Small steps. Learn as you go. Build your regenerative journey from here.

04



Engage your buyer on impact measurement

Proactively measure, report & engage. You have the data they need. Understand their priority impact areas – measure these. Be in the conversation, not measured against it. Proactive measurement of your own business is becoming your best defense against standards.

05



Invest in people and knowledge

Regen principles are universal; implementation must be local with your team. Your context is everything - knowledge needs to develop in-house. Find regional peers you can learn from. Major opportunity for skills development & career growth.



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Questions?

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