



Demeter[®], Marketing & the Biodynamic Movement: Feedback from the Community

A Stakeholder Research Project commissioned
by the Biodynamic Economic Working Group

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About the Biodynamic Economic Working Group

The Biodynamic Economic Working Group is an independent group of volunteer-professionals, including farmers, farm advisors and consultants, supply chain brokers, and processors. With endorsement from Demeter[®] USA and the Biodynamic Association, the group was formed in order to develop a marketing function for biodynamic products in the USA. Their goal is to establish a productive trade organization and a supportive marketplace for the benefit of biodynamic professionals and community members alike.

To learn more about the working group, please expect a new page on the demeter-usa.org website by the end of January, 2026. You are also welcome to send greetings, questions and feedback to the team directly at marketing@demeter-usa.org.

Introduction

A research study was commissioned by the Biodynamic Economic Working Group in order to gain a realistic picture of the biodynamic community, and to collect feedback and input from stakeholders. A survey was distributed via the Demeter[®] and the Biodynamic Association newsletters, and the group also solicited one-on-one interviews. The total data received (69 survey replies & 12 interviews) has been reviewed in detail by the Economic Working Group, and will directly inform the group's strategic planning. If you participated in this research - thank you! Your feedback is fundamental in ensuring that this work reflects the needs and interests of the biodynamic community. This report offers an anonymized summary of the key findings, and is structured as follows:

1. Challenges for Biodynamic Professionals & Farmer Voices
2. Opinions on Demeter[®] and the Potential of Biodynamic
3. Feedback on Marketing & Communications
4. Ideas on Organizational Strategy
5. Conclusion & Next Steps

Quotes have been included for richer detail, but they do not necessarily reflect the opinions or attitudes of the Economic Working Group. Every effort has been made to put quotes into context, and to make this report an accurate representation of the sentiments shared by research participants.

A Letter from Everett

My deep appreciation to those who participated in this research. The results of this research project are poignant and relevant to the current challenges and strengths in the Biodynamic movement in the USA. In some ways, there are no surprises contained in the results. What was shared has floated around in various circles over time. Concerns and tensions were shared. Some are long standing; others are more current. Accolades, ideas, and opportunities were also shared. The thoughtfulness and investment are readily apparent in the responses. To have all these insights coalesced in one document paints a complex and varied landscape with potency, openness, and honesty. Demeter and the Economic Working Group will be working with this research for some time to identify new ways to move forward to expand the inclusion and reach of Biodynamic. For me, the research also reinforces that Demeter is on the right track with some recent changes and emerging new initiatives (like reduced response times, staff/inspector training, and developing a Demeter approved input list for publishing). I look forward to what we can manifest from what has been so generously shared in the surveys.

I can be reached at evrett@demeter-usa.org or 541-929-7148 ext. 105.

All the best,

Evrett Lunquist
Director of Certification, Demeter Association, Inc.

Challenges for Biodynamic Professionals & Farmer Voices

Survey respondents who indicated that they work professionally with biodynamic products or practices were asked to assess which challenges are the most relevant for them personally. These challenges were the most relevant for most people:

*I don't have enough time or staff to do marketing.
I cannot charge the true cost of my product.
Certain regulations make my operation unnecessarily difficult.
I struggle to access the capital I need to startup, or invest in, my business.
I don't have enough time or staff to build out new value-chain partnerships.
The investment for getting Demeter Biodynamic® certified feels too much to justify the benefit.
It is difficult to access new markets or find new value-chain partners.
There is not enough research conducted or research available on biodynamic farm systems.
It is difficult to find a buyer for smaller / diverse quantities.*

Survey respondents could also elaborate additional challenges. Seed growers, for instance, expressed some frustration at not being understood or appreciated enough by the wider community for the crucial work that they do. Other comments expressed a lack of shared values from business partners, and a broad lack of awareness/understanding from consumers.

In respondents' assessment of their work-life satisfaction, most people disagreed with the statement: *My income matches the value of my work.* But most people agreed with the statement: *I feel fulfilled by my work / I feel connected to a higher purpose.*

Interviews gave additional color and insight into the challenges faced by biodynamic professionals, but the challenges vary significantly depending on the work. Wine growers, for instance, raised some unique challenges. Two Biodynamic®-certified grape growers explained that not every bottle of wine that reaches the market can carry the Demeter® label because they work with other wineries and vineyards who are not certified, and thus, their own certified status does not translate into a marketable asset.

A CPG brand/processor also discussed some of the challenges unique to his business. First, it was difficult to find enough certified suppliers, or co-packers for their product in the US, so they looked to the European market. There, they partnered with a broker who could manage the approximately 100 farm partnerships on their behalf, allowing them to reliably procure the ingredients they needed (at the scale they needed) in order to produce their products. An equivalent service was not readily available in the US market, nor a similar volume of supply.

Furthermore, their company relies on additional third-party testing to ensure that their products are completely free of contaminants, like glyphosate and arsenic. This additional layer of scrutiny sometimes requires them to source from organic growers, even though Biodynamic® would be their first choice. Finally, they wish for a fairer fee schedule, pointing out that they need to pay dues both to their regional organic certifier and to Demeter®, and their Demeter® licensing fees are applied uniformly, despite different products carrying different percentages of certified ingredients, and despite different sales channels earning different margins.

Farmer Voices:

Although more farmers participated in interviews compared with wine growers or processors, they tended to have more challenges to share, and most of the challenges were common to many. Several discussed how the encroachment of big-ag has resulted in fewer small farms and a loss of community. Being subjected to regulations that favor big companies results in further hardship for small farmers, and several mentioned that it's a burden to deal with so many agencies and regulatory requirements. A loss of community also exacerbates a sense of isolation for many farmers, both from colleagues and community members - and this is especially true in regions where the next-closest farm is a significant distance away. Several also commented on the difficulty of making their farm operation financially viable.

"They're right now working for too many other people... they're working for bankers, insurance companies, government subsidies, and then these processors, working under the markets, like the stock market. These are all really abstract things that I think make farmers really weighed down."

"The other big problem or challenge for grain farmers is in this consolidation, they don't have a lot of power to say, 'I have this grain and I want this price for it.' So, if they grew up with other farmers, maybe they would, but a lot of people have been so isolated for so long they don't really know how to do that. So a great loss of community in agriculture and I think the turning of food into just a commodity has also made farmers disconnected..."

- Grains Farmer

"Now in Wisconsin, you have to have a dairy processing license to be able to sell milk. That's in our laws. So if you don't have a dairy license, you can't sell milk. And so if you don't do exactly what they want, they just pull your license. And that threat is there all the time."

- Supply Chain Consultant

In addition, several farmers discussed the challenge of finding and retaining skilled workers due to several factors, like the seasonality of the work, or the inability to offer benefits. It is similarly difficult for farms to find motivated and like-minded successors, and the aging workforce represents both a risk to the movement's survival, and an opportunity for new people to join. Although a small sample, 60% of survey respondents were above the age of 51, and 90% were above the age of 40.

Finally, several farmers voiced skepticism and distrust at the notion of working with big buyers. A couple farmers had experiences where a relationship with a buyer ended unfairly or without explanation. Another two people expressed distrust at working with companies like UNFI or Whole Foods because, in their view, those deals are always made in favor of the buyer. One farmer who had previously sold into the global herbs market recalled constant fluctuations in price based on farms responding to health trends, unreliable buyers, and constant up's and down's in profitability:

"We had 13 acres of three and four year old biodynamically-grown echinacea. It was gorgeous, a beautiful field. We had a contract at a certain price and grower contracts are always written in favor of the buyer. There's always a way out. And China and Brazil planted a shit ton of echinacea because it was coming up in popularity. And it wasn't organic, but it was cheap. And at that point in the herb market, people just wanted echinacea on the label. And they didn't care about the quality. And so our buyer called us up and said, 'I can't honor the price we discussed. I could only give you this price.' I penciled it out. And we would have lost money for every acre we harvested. And I had to till-in 13 acres of biodynamic echinacea. And what was on the market? Crap. You know, so that hurt so bad that we got out of herbs."

- Herb & Veggie Farmer

Many farmers expressed a preference for local, direct sales, citing consistent profitability, more rewarding interactions, and an appreciative customer base.

"We don't have any middlemen. We're going straight from grower to consumer. And these consumers are willing to pay a retail price for the produce that we supply. And then a lot of them, they're really appreciative...And they come up to me, and they just say, 'thanks for growing my food for me.'"

- Veggie Farmer

Demeter® received a - 26% Net Promoter Score

NPS is a widely used indicator of satisfaction which asks respondents how likely they are to recommend something on a scale of 1 - 10. Total survey responses:

18 Promoters (26%) - score of 9 or 10

15 Passives (22%) - score of 7 or 8

36 Detractors (52%) - score ≤ 6

A negative NPS score indicates that Demeter® has more *detractors* than *promoters* among survey respondents (more people are *unlikely* to recommend Demeter® to a colleague).

Promoters shared that they believe Demeter® has the best certification standards out there, and, importantly, it keeps all compromised inputs out of the farm system. One respondent described it as a "*north star*." Others commented that it adds integrity and credibility to a farm's claims, which is important in modern markets, and one certified-farmer sees it as a system for encouraging continuous improvement on the farm.

Detractors explained that Demeter® simply does not have any recognition amongst consumers; '*organic*' and more recently '*regenerative*' are enough assurance for consumers and retailers. Without any marketing benefit, it's not worth the cost and effort to certify. Several also mentioned that it's particularly unnecessary for small farmers who are making direct sales and building strong relationships with customers.

In addition, a few people expressed their frustration about prior experiences working together with Demeter®, including slow response times from staff. Others also expressed frustration about the trademark, suggesting that it limits the growth of the biodynamic movement.

"And so out of respect for Demeter, we did not advertise ourselves as biodynamic, which to me is stupid because it hurt the movement. Because people would have been seeing the word all over. We've got lots of farmers markets, CSAs, we sell to wholesale, we sell to restaurants, we sell to natural food stores and stuff. And if we were saying 'we're biodynamic, we're biodynamic, we're biodynamic', well, then that word would get around and it would be a great marketing tool. But we weren't legally allowed to. So we didn't."

- Herb & Veggie Farmer

Participants offered numerous ideas for improvement along the lines of making certification easier and more affordable, including: cost-share or lowering costs for certification, making certification free, removing licensing fees, lowering the standards for processing, certifying per ingredient instead of for the finished product, recognizing inclusion of certified ingredients on the label, allowing small farms to self-certify, or introducing a peer-to-peer certification scheme for small farms. Others also suggested ways to simplify compliance and education for farmers, like simplifying the allowed inputs, or providing farmers (especially prospective farmers) with better explanations of preparations and other esoteric aspects.

"If Demeter is solely a certifying agency then charging for certification and inspection should be their total costs. Charging to license the brand seems out of place and is an obstacle to increasing certification broadly."

- Wine Grower

"Some sort of biodynamically acceptable product indication like you have with OMRI for organics would really help. Let chemical and fertilizer suppliers work towards getting their products BD listed in advance, and then last minute changes due to supply limitations, etc...won't put certification at risk."

- Wine Grower

"Find ways to support farmers so that they want to become certified: simple process to certify, education to have a successful BD farm financially and agronomically, resist the urge to disagree with other people in the BD movement in a disagreeable way."

- Advocate

Several participants also suggested that Demeter® do more to support regional groups and grassroots efforts, and to help consumers find and connect with their local farmers. One participant felt strongly that targeted sales prospecting is necessary to grow the market. And several others suggested that Demeter® help make connections between suppliers and buyers.

"Have more regular email communication with it's subscriber base featuring products, farms, and stories of biodynamic practitioners. Knowing who is practicing this regionally or even state specific would be good so I can support/purchase gifts/visit."

- BD Advocate

"The most valuable thing that you could do is have a list of 10,000 people who have bought biodynamics."

- CSA Organizer / Broker

"Be more present in our local and regional (northeast) food and farming activities and communities. There is so little focus or attention on biodynamic farming in the northeast that its (Demeter's) presence (at all) is sometimes as mystical as the way biodynamics is presented itself. It could help me as a consultant to be more visible and to reach out to the broader farming communities and consumers - not only would this bring more attention to biodynamics generally, but it would help my business (to answer the "how could Demeter better support me" question) to educate, consult, and advise others interested but not quite sure how to start farming biodynamically."

- Farm Consultant

"Nothing needed from Demeter. Need help in market development. Market Development means: Consumer education, internet sales platform for BD products, appropriate size processors to process BD products, retail stores carrying BD products"

- Supply Chain Consultant

While the feedback regarding Demeter® certification was varied and detailed, opinion on the *potential* of biodynamic agriculture was more straightforward. More than 75% of respondents agreed or strongly agreed with these statements:

The social and ethical values behind biodynamics could lay the foundation for more associative and cooperative value chains.

Biodynamic farming could do more to influence/inspire the sustainable food movement.

The practices of biodynamic farming has the potential to grow through market means.

Biodynamic products have the potential to be more competitive in the American marketplace.

PART 3

Feedback on Marketing & Communications

Many respondents also stressed that a significant investment must be made to market and communicate biodynamic farming to the American public.

"Broad based consumer education that describes the superior quality (nutrient density), taste, and keeping quality of BD vegetables, and does not mention at all how the preparations are made."

- Farmer

"Put real money, time, and creativity into marketing heavily in the US"

- CPG Brand/Processor

"Learn how to communicate BD value to consumers without any trace of anthroposophy"

- Wine Grower

"More information about what it is and does for ecology and climate"

- Home Gardener

Participants were also asked to offer input on effective marketing practices, based on their own experiences. Several people mentioned that word-of-mouth and direct experiences (actually tasting the food) have been crucial to their success. First-hand experiences were also suggested for the purpose of inviting more farmers into the movement as well. One participant suggested inviting regional farmers for farm tours and onsite workshops to introduce them to biodynamics in a more compelling way. Two participants also recounted their own experiences of witnessing a farm convert to biodynamic practices over time; these transformations can make compelling stories as well.

"And I think there is a wonderful expression. You can always tell a farmer, but you can't tell him much. But you can show them. So if I want to affect change, I have to show people, here it is. So open source our financials, open source our methods, be very transparent about everything that we do to help others have the courage to do the same thing."

- Wine Grower

Several people also suggested focusing on likely target groups, like Waldorf school parents, preppers, or "MAHA moms" - people with similar core values, like freedom, food sovereignty, and clean food. However, at least one person wondered if it would be possible to reach the "everyman" with the biodynamic message because everyone eats.

One interview participant also recounted his experience of garnering support for his local farm by explaining to his community members the true cost of running the farm and why it was important to keep the farm running. In his experience, being honest and transparent about finances helped to build trust. Furthermore, he believes that, for some of the people he encounters, "unaffordability" can be a limiting belief; being able to afford good food is a matter of priorities.

"And so my wife and I, we started supporting the farm with a monthly contribution...And then I started inviting other people do the same thing too. Would you like to jump in and pay twice as much for the food? And here's why... Just one-on-one personal conversations with people... When I saw that they were subsidizing my food, I was like, 'that's just wrong.'"

- Community Organizer & Advocate

Many participants expressed frustration that, in many instances, biodynamic narratives are missing the main points. Instead, the more esoteric aspects, like the preparations, have featured more prominently in the collective conversation.

"But when I look at Demeter USA today, when you Google it, on the first two or three pages, you will read more about putting cow dung in horns and burying it than you will any other aspect of biodynamic farming. You'll read more about pseudoscience. You'll read more about farming based on the cycles of the moon. You will read that before you will read what I feel is the really important pieces, which is what these people are doing - the soil health, the zero GMOs anywhere within the certification, obviously no chemicals."

- Brand/Processor

Many participants suggested that biodynamic narratives need to be made simpler, more approachable, and more exciting. One participant suggested *"using creativity and artistic direction to stimulate and excite folks."*

Several participants also expressed the need for more credible research (this was also a highly-relevant challenge in survey results). In particular, they suggest more credible research which can verify the superior quality and nutritional density of biodynamic food vs. food grown with other methods.

"There's no investment in research. And the research that has been done has just been poorly executed...There needs to be research on how biodynamic practices boost nutrient density, how it boosts keeping quality, how it boosts flavor, stuff that people can latch their minds onto to and say, 'Wow, this produce is exceptional. And I should be going out of my way to look for this produce. And I should look to support farms that produce in this way. Because by doing this, I am getting food that will actually feed me, that will actually nourish me, that gives me the life force I need to be healthy.' And there's never been any concerted research devoted to that."

- Farmer

Interview participants also acknowledged several broader cultural shifts that could be supportive or synergistic with the biodynamic movement. For instance, more people are waking up to the ill-effects of processed foods and demanding transparency and clean food. More people are becoming interested in spirituality, and less so in religion. And finally, more people are becoming interested in having tangible experiences, like baking their own bread, and perhaps this desire could draw more young people into farming.

Altogether, research participants surfaced some potential clear and compelling differentiators for Demeter® / biodynamic:

- Exceptional produce; superior taste & longer lasting
- More vital, nourishing & nutrient-dense
- Fulfillment & continuous learning for farmers
- Encourages rigor/structure & continuous improvement on the farm
- Unique soil monitoring requirements
- Sustainable model / carbon sequestration potential
- Feasible model even on degraded or imperfect land
- Small-scale farming is more economically viable / attainable with the biodynamic method
- Lower cost to certify compared to competitors
- Cost-savings on inputs over time
- Non-profit certifier with integrity
- Certification gives producers credibility

PART 4

Ideas on Organizational Strategy

Although most people agreed with the earlier statements about biodynamic farming having the potential to grow through market means, there were mixed opinions about how exactly to achieve this. In interviews, participants reflected on whether or not individual biodynamic farms can be scaled up to larger acreages. A couple of people felt that, in order to practice biodynamic farming authentically, land sizes can only be as big as the farmer/steward can reasonably understand and manage as one organism. However, several people expressed interest in seeing the emergence of larger-scale biodynamic farms, in order to increase Biodynamic®-certified food on retail shelves. There were a few suggestions on how to achieve this. For instance, one participant suggested focusing on specific crops, like grains and hearty herbs - crops that are comfortable growing in large acreages and can withstand transport without losing much vitality. Another participant suggested forming cooperatives with like-minded neighboring farms in order to manage larger acreages together. And another participant suggested a database or data-tracking to better understand available supply, including for uncertified farms. This way, when a buyer is interested in large quantities of crops, they could be connected with a willing biodynamic farm. Facilitating such connections could encourage more supply, make it possible to certify more farms, and eventually result in more Biodynamic® products on retail shelves. A similar idea was mentioned with the example of Organic Valley in its early days: they gave farmers a fair, fixed price for the whole year. Such agreements could give farmers the assurance and the motivation to grow larger quantities.

"If large fields of biodynamic things could be grown, I mean, you know, done right... Then Demeter certification would be really valuable ...It really comes in handy when a consumer who doesn't know either the factory where the food is produced or processed or the home farm, that's when the consumer really can value that Demeter stamp... Grains are a wonderful place for biodynamics to happen because they're comfortable growing in large acreages, as opposed to specialty crops, which really benefit from not having huge fields of something, but having much diversity within the fields. So grains are really a good place for that to happen."

- Farm Consultant

"I think the economic group having some awareness of what potential there is for growing, in the United States, and that could be even people that aren't certified, because there's people practicing biodynamics that aren't certified that could easily be certified. And if it was a situation where they had a demand, like, 'oh, somebody wants an acre of this', and it's something that they could fill, then yeah, that could be a very easy increase in supply of biodynamic crops."

- Demeter Certifier

"One thing we've been talking about a lot up here in our group is maybe looking at more of a cooperative system in that groups of like-minded growers could band together and accomplish more of a closed system over sufficient scale by working together to achieve that over our small properties... But at large scale, I have a hard time envisioning how farmers would be practicing biodynamics over these thousands of hectares of property and really accomplishing that level of detailed knowledge of their properties. And, you know, I think it almost requires multi-generational knowledge of the properties, right?"

- Wine Grower

However, several people also emphasized that the movement needs to nurture and support local, grassroots efforts, and they suggested alternative models for supporting biodynamic farms. For instance, several participants would like to see more associative CSA models in which a community organizes to provide robust support for a farm (financial & social) in order to embed the farm as a vital part of the community and to secure its future. Another participant offered the example of L'Aubier, in Switzerland, as a model of what an association could look like. L'Aubier is an association of businesses including a biodynamic farm, an eco-hotel, a restaurant, a housing development, and a training academy - all working together under shared values, and supporting each other financially.

Hawthorne Valley, New York, provides a similar example. And according to the same participant, these success stories have a few traits in common: large teams with good relationships and shared values, geographical closeness, and ownership over food processing.

"Yeah, I'm more in favor of local. I mean, it makes all the sense in the world. It's like, if we want to have these biodynamic farms, and pretty much in my view, by definition, to have a biodynamic farm, it has to be small. You're not having thousands of acres, just, you know, each farm in itself is an organism that just can't be that big. And so you need community around the farm."

- Community Organizer & Advocate

"I do think these national organizations, they only will maintain themselves and their vitality if they're really rooted in local and regional work. And I think a bigger investment needs to be made in that."

- Consultant & Educator

"But I personally think that the healthy future for agriculture and society is to have tight local connections, food production to the people in an area. And the ways that we can support that will have the largest impact, I think."

- Farmer

"So my thinking today is, from watching everybody that's successful in biodynamics, financially successful, is they're direct to the consumer. And we're not a huge company. We're like a little specialty agriculture. And when we think like we're a big agriculture, it does us a disservice...you have to realize who you are."

- Supply Chain Consultant

Despite diverging sentiments on the viability and virtue of scaling up, there was wide agreement about the need for more people acting as connectors, salespeople and supply chain brokers. Similarly, one participant emphasized the need for more biodynamic technical advisors and consultants, suggesting that community elders could be mobilized to educate and support newer farmers.

"You need biodynamic supply chain incubators. And even a lot of big companies can probably see the need for that because they wind up running short of ingredients. They're the ones who maybe have the money, could start a new product line if somebody could find the ingredients for them."

- Consultant & Educator

"...And we can get a few farmers to come over here and look at your farm and they can come up with some ideas to help you be more profitable. And so now we're talking to a social movement not just an economic one and a spiritual movement because you're creating food to help that capacity to take care of each other... I mean, Will would be that way, Ben would be that way, and you know, they're old enough to bring wisdom. Diane would be that way."
[Names changed for anonymity]

- Supply Chain Consultant

Many research participants also acknowledged instances of division, disagreement and stagnation within the movement's history. Some also questioned whether the people leading these organizations have what it takes to change internally and create real change externally. Some participants also acknowledged the wide spectrum of regional and business contexts, professions, beliefs, and experiences that make up the US biodynamic community - a community also characterized by passionate personalities. One interviewee addressed these issues by calling for a broader spectrum of strategies that addresses everyone's needs, and which everyone can buy into.

"I think the most effective movements have the right balance of both functions. They have the grassroots function really strong, but they also have a national or statewide organization that that supports that grassroots work and helps tell the story of it and helps bring resources to bear on it. So I'm actually a fan of sort of bottom-up and top-down organizing"

"And so it's understandable that you would have one camp that's like, come on people, can we get some value for this... crazy licensing fee we're paying to Demeter, we need to get some value for that. And then we have a bunch of other people who see that the whole big-company direction is not sufficient, like that we need a grassroots work, more creative and dynamic and more probably a guerrilla marketing, like a consumer-driven approach...I would think that your challenge would be to build a spectrum of strategies that everybody can buy into....But I think you're going to need that economic working group to all agree on a very nuanced strategy that goes from the grassroots all the way up to the big company, retail stores, the different audiences. And to not get in a battle over, oh, we want to put all the money here or all the money here. That's just a lose, lose."

- Consultant & Educator

Conclusion & Next Steps

The research provides a diverse depiction of the challenges, experiences, feedback, and ideas from the biodynamic community. It is the intention of the Economic Working Group to utilize these findings in order to build a comprehensive and inclusive strategy, and to make their efforts as open and participatory as possible - with the community and with partner biodynamic organizations. A few opportunities have emerged:

Improve the Demeter® certification offering

Research participants offered numerous ideas to reform certification so that:

- It is easier for new farmers to get started
- Compliance protocols for farmers are simplified
- Certification fees are waived or significantly reduced (especially for small farms)
- Licensing fees are waived or significantly reduced
- Processing/labeling standards are reformed so that certified ingredients can become more visible on end-products

Work in this direction must also take into consideration financial viability, and may necessitate broader reforms to the Demeter® revenue model. Proposals to reform the certification must also respect the international standard, and the original spirit of Demeter® as a top-quality standard. That said, the research revealed a clear response that reforms are urgently needed to make certification more attractive, fair, and sustainable for licensees and prospective licensees. Research findings and input may be offered by the Economic Working Group, but final decisions regarding certification reformations fall to Demeter® only.

Develop a fundraising strategy

Reliable and sufficient revenue is needed to support improved capacity and services from the Demeter® certification team, the newly-emerging marketing team, and to support all of the work streams listed here. Additional revenue could also enable a reduction in costs and fees for licensees, and make certification more accessible. Therefore, outside investments are crucial, and strategic fundraising must be prioritized.

Redevelop the US Demeter brand

The research confirmed that Demeter® has low brand recognition in the USA. Significant attention needs to be paid to the Demeter® brand - its logo, colors, tone of voice, persona, and unique selling points - to find opportunities for improvement.

Redevelop the communications strategy

1. Research participants felt that common narratives, including on key channels like the Demeter® website, tend to miss the most important aspects of biodynamic farming. A clear and compelling communications strategy needs to be developed with numerous audiences in mind, and then applied on key marketing channels. For instance, introductory messaging need to be more approachable for newcomers, with pathways available for those people who are curious to learn more. In addition, educational, technical or FAQ content could be made more readily available for farmers or prospective farmers.
2. Additional storytelling needs to be developed to cover more perspectives, and to reach more audiences. For instance, land transformation stories and farmer testimonials can help make the case for biodynamic farming.
3. Research participants also emphasized the importance of credible research. Efforts should be made to identify viable research opportunities, especially proposals aiming to assess the quality and nutritional density of biodynamic food vs. food grown with other methods.
4. It is also vital to pursue outside press on research studies and any positive biodynamic stories in the US.

Develop a marketing strategy

Further research and discovery is needed on prospective target groups who are receptive to the Demeter® message; what are their values and motivations, what trends are influential to them, and how/where can they be engaged with? Marketing campaigns can be designed accordingly. In addition, further research is needed to determine priority trade shows and conferences, and how to design experiences that stand out. Research participants also suggested relying more heavily on farm tours and first-hand experiences, like food tastings, to demonstrate the advantages of biodynamic in a more memorable way. Effort should be made to identify opportunities for such events, to help organize them, and to see that they're well-attended by people not already involved with biodynamic farming. Finally, traditional marketing channels, like website and social media, need to be utilized to the fullest extent with high quality content, in order to increase visibility.

Develop localized organizational strategies

- Build relationships with regional groups and grassroots organizers, and find ways to collaborate with them
- Support the mobilization of more broker/liaison roles who can help develop healthy supply chains
- Support the mobilization of more biodynamic farm consultants

- Find and nurture opportunities for new CSA's and associations to form
- Connect more consumers with more local farmers - through an online directory or with localized newsletters

Additional Ideas

1. Identify potential strategic partnerships with like-minded organizations, and develop creative strategies for initiating collaborations with them
2. Develop more robust capabilities to track available supply, match interested buyers with producers, and help negotiate fair agreements
3. More than half of survey respondents agreed that these ideas would also be important for the trade organization to pursue:
 - a. *Development of an e-commerce platform for direct-to-consumer sales of Demeter Certified Biodynamic® products*
 - b. *An online directory / database for finding relevant value-chain partners*
 - c. *Marketing materials / toolkits (text, images, video, brochures, talking points etc.)*
 - d. *Training materials about how to talk to consumers/buyers about biodynamics*
 - e. *Negotiation with retailers to accommodate smaller-volume producers*

Thank You!

If you have feedback, questions or ideas related to this research report, please feel free to contact the team directly at marketing@demeter-usa.org.