Regenerative Organic Certified®

From Certification to Vineyard Practice to Market Opportunity

What ROC™ is, how vineyards are implementing it, and what it means for the marketplace.

Regenerative Organic Alliance

Napa Valley Grape Growers - Organic Conference

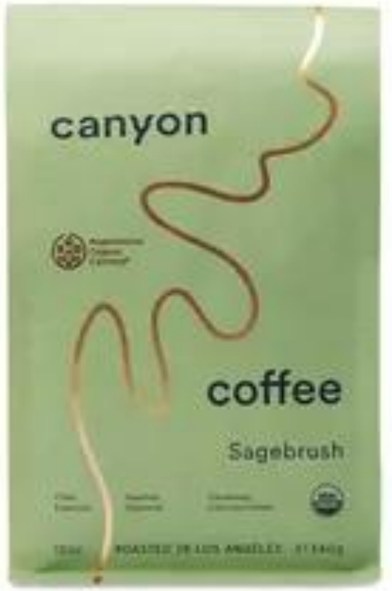
Panel Discussion

What is Regenerative Organic Certified?

ROC™ builds on existing organic certification by adding:

Three Pillars:

1. **Soil Health**
2. **Animal Welfare**
3. **Farmer & Worker Fairness**



IMPACT BY THE NUMBERS

22.3M
Certified Acres

3.2K
Certified Products on the Market

47
Countries Operated in

374
Brands Licensed

583
Different Types of Crops

15
Approved Certifying Bodies
&
196
Trained Auditors

540
Certified Farms and Ranches

55.9K
Smallholder Farmers

ROC™ Vineyards

CALIFORNIA

Vino Farms
Neal Family Vineyards
FarmTogether
The Donum Estate
Vino Farms (Ledbetter)
FarmTogether
Bedrock Vineyard
Abbot's Passage Winery
Groundstar Vineyard
Stag's Leap Wine Cellars
Halter Ranch Vineyards
Villa Creek Cellars, Maha Estate Vineyard
Tablas Creek Vineyard
Le Cuvier Winery
O'Neill Vintners & Distillers
Booker Vineyard
Grgich Hills Estate
Spottswoode Estate
Solares Vineyards
Moon Dust Vineyard
The Donum Estate
Gundlach Bundschu

USA (OTHER)

Ambar Estate
Estelbrook Farms and Vineyard
Troon Vineyards
Soaring Eagle Orchards

INTERNATIONAL

Champagne De Telmont (France)
Chateau Galoupet (France)
Domaine de Trians (France)
Mirabeau Agricole (France)
Weingut Georg Toifl (Austria)
Weingut Jurtschitsch (Austria)
Winkler-Hermaden (Austria)
Elena di Cunial (Italy)
Podere l'Assunta (Italy)
Azienda Agricola Giol (Italy)
Vinedos Emiliana (Chile)
Domaine Bousquet (Argentina)
Mullineux & Leeu (S. Africa)
Inkwell (Australia)
Vignoble de la Bauge (Quebec)
Southbrook Farms (Canada)

~44 wineries Regenerative Organic Certified® globally~25 in California, 28 Licensed wine brands ~

Key Regions: California · Oregon · Washington · France · Austria -Canada · Argentina · Australia · South Africa - Italy

Organic & Regenerative Organic Certified® Framework

ORGANIC: Foundational AgroEcological Principals

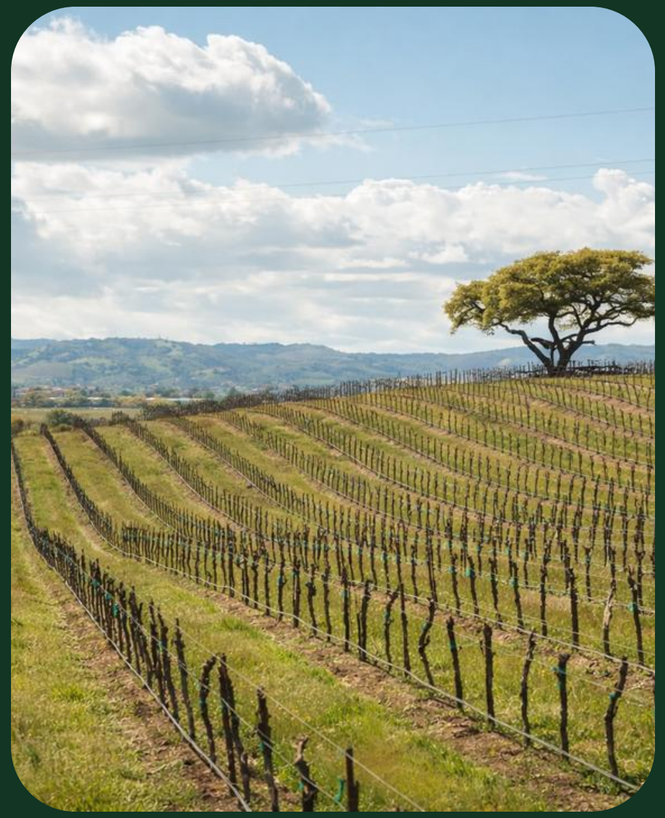
- Working in harmony with nature
- Using only allowed inputs
- Avoiding synthetic chemicals and GMOs
- Animal welfare and humane treatment
- Preventing contamination between organic and nonorganic
- Sustainability and environmental health

ROC™ added pillars for regenerative systems

- Focus on practices and outcomes
- Actively improves ecosystems and requires continuous improvement
- Builds soil health
- Adds animal welfare
- Adds social fairness

"Organic tells us what growers avoid. Regenerative Organic tells us how growers actively build healthier ecosystems."

How the ROC Standard is Being Applied in Vineyards and Grapegrowing



“Regenerative practices are increasingly viewed as vineyard resilience strategies, not simply sustainability initiatives.”

Soil Health

“Regenerative organic farming begins with a simple but transformative idea: soil is a living system.”

- Diverse and Permanent cover crops
- Reducing or Eliminating tillage
- Compost application
- Mulching and roller-crimping
- Eliminating pesticides and herbicides
- Soil organic matter monitoring to build living soil

Biodiversity

“Making our vineyards havens of biodiversity, where native species can reside without exposure to chemicals, is a salient way that we ensure their welfare.”

— Ivo Jeramaz, Grgich Hills Estate | Wine Folly

- Pollinator habitat strips
- Diverse Cover crops
- Livestock integration
- Reduced chemical use.
- Owl and bat boxes for rodent and insect control
- Beehives and insect refugia to support beneficial species and natural pest balance.

Livestock Integration

“There is great potential with animals to accelerate soil health and regeneration through planned, strategic grazing management. Livestock also have the potential to reduce machinery movements throughout the vineyard at certain times of the season.”

— Regenerative Viticulture Foundation

Sheep ~ Poultry ~ Cattle ~ Llamas ~ Goats

- Under-vine weed management, Targeted grazing
- Pest control
- Reduce mechanical mowing and herbicide use
- Improved nutrient cycling and fertility through manure and urine
- Stimulate biological activity in the soil
- Support biodiversity & build soil organic matter
- Close nutrient cycles within the farm ecosystem

Water Resilience

“The Most Important Water Reservoir in a Vineyard Is the Soil.”

- Improved infiltration through healthy soil structure
- Higher water-holding capacity
- More Organic Matter = More water holding capacity
- ·Reduced erosion from cover cropping
- Greater climate variability and drought resilience in vineyard blocks
- Reduced or no-till helps preserve soil structure

Education & Professional Development

Anti-Discrimination Systems

Wages & Benefits

Employment Contracts

Social Fairness

Freedom of Association

Working Hours

Grievance Mechanisms

Workplace Safety

Farmer & Farmworker Fairness - The Often Overlooked Pillar

ROI of Regenerative Organic Certified®

What Is the Return on Investment?

Investment → Outcomes

Cover Crops → Better infiltration → Drought resilience

Compost → Soil carbon → Water retention

Livestock Integration → Reduced mowing → Operating efficiencies

Habitat Enhancements → Biodiversity → Ecosystem services

Healthy soil → Active biology → Efficient nutrient uptake → Higher-quality fruit

Certification → Market trust → Brand differentiation

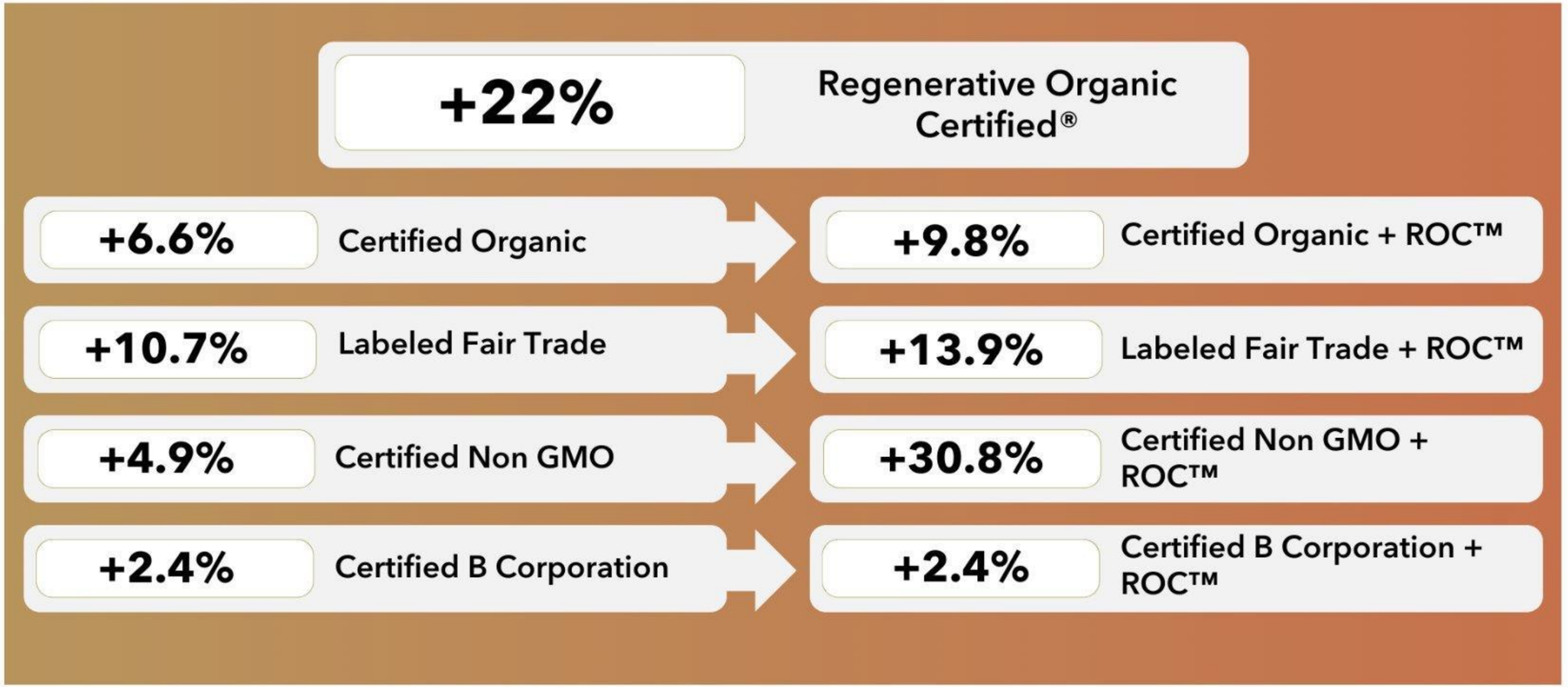
- ✅ Reduce input costs
- ✅ Improve drought resilience
- ✅ Build healthier soils
- ✅ Increase long-term land value
- ✅ Access differentiated markets
- ✅ Strengthen profitability over time

From Agricultural Practices to Consumer Response

How regenerative practices in the vineyard translate into marketplace value

🌱 Regenerative Practices → 🍷 Market Differentiation → 🛒 Consumer Demand

YoY MULO Growth for Sustainable Products Based on Label Claims With and Without ROC™ Inclusion



SPINS

Source: SPINS Natural Channel + Multi-Outlet (MULO) (Powered by Circana) Dept: VMS, Grocery, Frozen, Refrigerated, Alcohol 52 Weeks Ending 05/18/2025

ROC™ Wine Sales & Market Trends

$8.39M

ROC Wine Sales 03/25–03/26 | 7.36% growth

SPINS retail data shows strong momentum for regenerative organic certified wines in the marketplace.

“The global organic wine market is projected to grow from roughly $13 billion today to between $29 billion and $36 billion by 2033–2034, even as the broader global wine market contracts.”

Source: vinetur.com/en/20260618102941/organic-wine-sales-keep-rising-as-the-global-wine-market-shrinks.html

Consumers Are Seeking What ROC™ Delivers

Regenerative Organic Certified® wines offer more than sustainability—they represent a commitment to quality from the ground up.

- ✅ Farming practices that care for people and the planet
- ✅ Environmental stewardship & climate resilience
- ✅ Soil health and biodiversity
- ✅ Transparent production practices
- ✅ Premium quality and authenticity
- ✅ Third-party verified claims

60%
Of Millennials and Gen Z are willing to pay more for eco-friendly products

52%
Increase in sustainability interest among organic wine consumers (YoY)

249%
Increase in "no additives" interest among Millennial organic wine consumers

Resources to Support Regenerative Transition

IMPLEMENT

Enterprise Vineyards

Jack Neal & Son

Roots Vineyard Consulting

One Block Challenge

MEASURE

Agrology

Sectormentor (VIDA)

LEARN

Regenerative Viticulture Foundation

Napa Valley Grape Growers

SORBET

Napa Green

Paicenes Ranch

Mindset Symposium

Regenerative Organic Alliance

The Regenerative Organic Alliance appreciates your commitment to transforming agriculture for people, planet, and future.

Thank you.