

The Rise of Regen Barley.



**Lessons from
the Doers**

In this series, AgFood pioneers share their journey toward regenerative sourcing—navigating tough terrain from farmer engagement to supply chain shifts, business strategy, and consumer trust. They're pioneers, building a resilient, net-zero food system—and we're asking the questions that help others follow in their footsteps.

Produced by

In partnership with:



The Rise of Regenerative Barley & the brewers behind it.

Brussels Beer Project, Duvel Moortgat, Carlsberg: their company sizes couldn't be more different - and that's exactly what makes our conversation with these brewers so insightful. We explored what it really takes to shift supply chains at different scales, questioned whether a consumer premium is essential to make the business case work, and uncovered why, in the end, the true driver might be securing supply and building long-term resilience.



Olivier De Brauwere

Co-founder of Brussels Beer Project (BBP).

Olivier brings the agility and grassroots energy of a craft brewery.



Peter Willaert

Sustainability Director at Duvel Moortgat

Peter leads regen efforts at a mid-sized, international, family-owned brewery group.



Simon Boas Hoffmeyer

**VP, Global Head of Sustainability
& ESG at Carlsberg Group**

Simon shares the big-picture view of a global brewing giant.



BRUSSELS
BEER
PROJECT

Date	Ongoing journey since 2019.
Goal	Increase regenerative barley sourcing from initial small amounts to 50+% currently, aiming for 75% by next year.
Scope	Regenerative barley in all beers. 2 are close to 100% regen barley: Terra Pils and Lazy Panda
Impact	Strong local impact on CO ₂ reduction and soil health; planting seeds for wider regen ag adoption in Belgium.
Special Power	Regenerative agriculture is part of BBP's core DNA; entrepreneurial structure enables experimentation.



Date	Contracts concluded in 2023, seeds planted for 2026 harvest.
Goal	Partnering with major malt suppliers and cooperatives to scale regenerative malt sourcing across Europe.
Scope	Secure 10% of malt supply from regenerative agriculture by 2026, representing a 5% reduction in their scope 3 FLAG-based emissions and scale towards 40% by 2030.
Impact	~1,600 tons of malt sourced from regen ag, supporting farmer transition with long-term contracts; fostering awareness and collaboration.
Special Power	Family-owned international brewing group, cross-inspiring one another to "Preserve What We Serve"



Date	Pilot successes in recent years; expansion planned for 2025 and beyond.
Goal	Sourcing regen barley in core EU supply sheds, in Finland, France, Denmark and UK - bringing these projects from pilot to scale.
Scope	Reach 30% regenerative barley sourcing by 2030; source 15,000 tonnes in Denmark alone in 2025 (40% of Danish market needs).
Impact	Improved soil health, reduced carbon emissions, and stable yields demonstrated; strengthening supply chain resilience.
Special Power	Foundation-owned, allowing long-term focus on sustainability and resilience beyond shareholder pressure.

Let's start at the beginning, what triggered the shift to Regen Ag?

Simon Boas Hoffmeyer, Carlsberg: When you look at the latest European State of the Climate report, it's clear: the last 30 years have brought more rain to Western Europe, more drought to Eastern Europe, and increasingly erratic weather patterns. We need to be careful with attributing direct causality to climate change, but the signs are obvious. If we didn't adapt, we'd be foolish. The regenerative agriculture movement must overtake conventional agriculture—at the very least because the weather has changed.

Olivier De Brauwere, BBP: Having a positive impact is part of Brussel Beer Project's DNA. It started with our focus on local sourcing. We had great maltsters, breweries, beers, and consumers—but no local barley. The local aspect drove us first, then regenerative agriculture became essential.

Peter Willaert, Duvel Moortgat:

I had a chance to travel globally—Australia, Canada, Ireland—always asking farmers how they cared for their land. Those stories helped me see that another way was possible.

A story that really resonates with me is from my nephew, a regenerative farmer in Belgium. He works less—less ploughing, fewer pesticides, fewer weeding. When his neighbors' fields flood, his don't. His soil acts as a water buffer. I was also inspired by the movie *Kiss the Ground* and shared it to start conversations with colleagues.



“Thirty years ago, when driving through the South of France—our main barley supply area—you had to stop every hour to clean your windshield because of insects. That’s not the case anymore. Conventional agriculture has depleted the soil and reduced biodiversity.” Peter Willaert

In your specific cases, what where the business drivers for investing in Regen Ag?

Simon Boas Hoffmeyer, Carlsberg: Agriculture is critical for reducing our environmental impact—CO₂ footprint, biodiversity loss, and more. Regenerative agriculture offers scalable solutions that reduce carbon emissions while maintaining stable yields, improving soil health, reducing synthetic inputs, and protecting water resources.

“We’ve seen many certifications, but none that fully balances carbon reduction, stable yields, lower chemical use, and resilience. Regen ag can.”

Olivier De Brauwere, BBP: Four years ago, we created a Green Council, with input from external experts, to reduce our environmental impact. We realized we weren’t doing enough.

The Council pushed us to act faster—we even stopped exporting outside Europe. Regen ag started small in 2019. Nobody had experience then. The first crops were like a “childhood disease”—it took time to build knowledge and improve quality.

But once we saw consistent quality, we decided not to wait. We’ve gone from a few percent to 50% of our barley sourced regeneratively, and next year we’re targeting 75%.



Peter Willaert, Duvel Moortgat:

About 10% of our corporate carbon emissions are FLAG-related (Forestry, Land, and Agriculture).

When I joined Duvel two years ago, there wasn’t a strong understanding of Scope 3 emissions and their relevance to brewers. I focused on building awareness internally. One of the best ways was to take colleagues to the field, when we held our executive committee meeting at the cooperative. Seeing regenerative farming firsthand, hearing from the farmers directly, energized the team.

We were too disconnected from where our ingredients come from—we needed to reconnect with farms.

How do you think about scale? Are pilots really necessary?

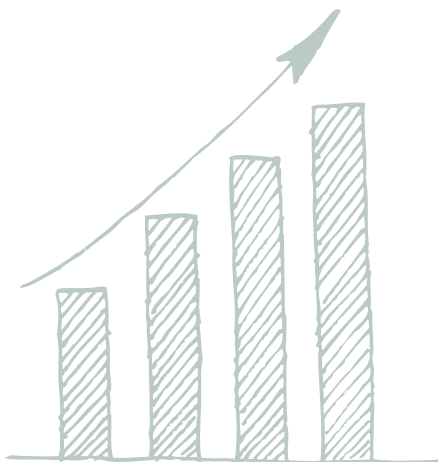
Simon Boas Hoffmeyer, Carlsberg: We set a 30% regenerative barley target by 2030 after successful pilots in Finland and France showed real benefits—better soil health, reduced carbon, stable yields. That gave us the confidence to scale.

We're now expanding in France, Finland, the UK, and Denmark, where we just contracted 15,000 tonnes of regenerative barley—covering 40% of our Danish yearly barley usage.

Scaling brings traceability challenges. In smaller markets like Finland, we have full traceability. In France, we use blockchain, but it's complex. In the UK and Denmark, we apply a mass balance model—less granular but practical for larger volumes. It's all about local circumstances and value chain capabilities.

Olivier De Brauwere, BBP: We started in 2019 with our Dansaert brewery, brewing our lambic with local regenerative barley.

Our partners CultivAé and Belgomalt were already pioneering this—we were early buyers, but the push came from them.



To scale, we wanted to keep two suppliers for resilience. We pushed Dingemans, who worked with organic and conventional barley, to develop a regenerative offer. They found farmers and successfully shifted to regen barley.

“Technically, scaling was straightforward—test, tweak, and go. Scaling is really about building long-term supply, not solving technical barriers.”

Peter Willaert, Duvel Moortgat: For us, pilots are about proving what works—with real numbers. Regenerative practices differ across countries and sourcing regions, so we started a pilot programme with all our malt suppliers, sourcing barley from different regions.

We pay a premium and expect to get the learnings from these programmes. The only way to scale is to test in the field and collect solid evidence for building the long term business case.

We refer to the programme internally as the “Preserve What We Serve” programme, as it is about building resilience in our crop supply and has to guarantee that we will be able to source qualitative malts now and in the future. This year, we signed contracts with three major malt suppliers, who in turn contracted with their cooperatives.

The seeds are already in the ground, and next year we'll source around 1,600 tonnes of regenerative malt—about 10% of our European malt supply.

Talking about costs, is there a business case for regenerative beer?

Peter Willaert, Duvel Moortgat: All malt suppliers and cooperatives ask for a premium to make the transition happen. In a market where sales are under pressure and raw material costs are rising, it's not easy to bring this to management and explain the business case.

That's my biggest challenge. In the energy transition domain, it's simpler: there's a payback, savings and ROI. With regenerative agriculture, proving the business case is harder.

Simon Boas Hoffmeyer, Carlsberg: Its commonly known that there is an on-cost for the initial transition, but everything we've seen—from studies, from farmers—shows that regenerative systems can reach similar profitability to conventional farming.

Lower variable costs, less fertilizer, less tractor use—those savings can balance the potential yield drops during the transition. And with climate change, soils that hold water and resist drought are simply a better long-term bet - it creates much needed resilience for the farmer and the planet.

“We saw the same at CultivAé just two weeks ago—during a major drought, the regenerative barley was growing well while conventional fields struggled. That's the real business case: resilience.” Peter Willaert

Olivier De Brauwere, BBP: And conventional farming is only getting tougher—denser soils, more chemicals, more flooding. Regenerative barley costs us about €100 more per tonne, which is significant for a small company like ours.

But we're not on the stock market, we don't have shareholders chasing profit. We chose this path and we're happy to pay more because it's a direct way to reduce CO₂ and improve our footprint.

Peter Willaert, Duvel Moortgat: I used to work in Fair Trade. Back then, you had to pay more for Fair Trade mangoes, in order to guarantee farmers in the South a fair income. Today, Fair Trade is everywhere—you can't find a non-Fair Trade mango in supermarkets.

“I hope regenerative will follow the same path (as Fair Trade) and eventually become the norm.”

But the pricing model today is still pegged to volatile commodity markets. Why should the price of local barley be impacted by a blocked ship in Ukraine? We want to break from that, by offering farmers long-term, fair prices decoupled from commodity fluctuations.

Some years I might pay more than conventional, some years less, but the key is giving farmers price certainty so they can invest in regenerative practices. Right now, market mechanisms are a barrier to scaling regenerative agriculture.

BBP, Duvel, Carlsberg: a craft beer, a mid-size company and a large - does size matter when it comes to scaling Regen Ag?

Peter Willaert, Duvel Moortgat: Duvel is a group of local, family owned, and independent breweries. We do not have a large corporate structure where each brewery has its own P&L and keeps its autonomy to adapt its sustainability strategy to local realities and ambitions.

What works is inspiring and creating awareness - then you find early adopters who make it happen.

For example, our master brewer in California is very active in sustainable agriculture. BBP is a smaller, more agile company. For them, it's probably easier - they have smaller volumes and less corporate weight.

Olivier De Brauwere, BBP: Yes, it's easier for us. We're small, flexible, brewing every day. We're ready to take the risk, even if that means losing a batch.

But honestly, we know our biggest impact isn't what we directly do—it's what we inspire. We're a drop in the ocean. Since 2010, we're maybe the biggest new brewery in France and Belgium, but we're still 100 times smaller than Duvel, let alone Carlsberg.

Look at how many breweries now use unsold bread. Maybe Babylon beer wasn't the sole reason, but it played a part—we're planting seeds. Same with regen ag. CultivAé launched it, we were just there at the right time and believed in it. The credit is all theirs.

Go talk, brainstorm, share what worked and what didn't, and be patient. In the end, it's a people project. If regen ag is progressing in Belgium, it's thanks to people like Catherine from CultivAé and Alexander from Belgomalt.

Simon Boas Hoffmeyer, Carlsberg:

For us, regen ag is not a niche. We don't want it to be just 10% of the market by 2030—we want it to become the new conventional.

That means learning from all the existing movements—conservation agriculture, organic farming, low-till, no-till—and building a 'third way' that works at scale.



“You need believers at the start—and others to follow and grow the movement. What’s exciting is that now, more and more regen barley is being produced and big players are starting to talk about it.

Olivier De Brauwere

What will help shift regen ag from the fringe to the mainstream?

Simon Boas Hoffmeyer, Carlsberg: Inspiration is key, but let's be clear—no farmer is going to change just because Carlsberg says so. What really works is peer-to-peer learning.

Farmers trust each other, and observed benefits on the ground, not big companies. That's why growers groups and co-ops are absolutely essential. Without them, we won't scale.

I've been deep in these conversations for the past four or five years, and what excites me most is hearing farmers tell their own success stories. Like when a conventional neighbor came over after heavy rains and asked, "How were you able to harvest? My field is still flooded." And the answer was, "It's the soil—it's holding up because of regenerative practices."

That's the moment when it clicks.

"We have a saying in Denmark, *It sells like freshly baked bread*. And that's how I see this: companies like us can help by creating demand, sparking public conversations, and pushing the topic forward.

But the real scaling happens when farmers take it on themselves—sharing experiences, seeing the data, working through growers groups, and realizing the benefits firsthand. That's what unlocks scale."

Simon Boas Hoffmeyer



Besides peer-to-peer sharing amongst farmers, what are other unlockers for Regen Ag to become the new norm?

Olivier De Brauwere, BBP: One of the challenges is that no one really knows what regenerative agriculture is. Having some kind of label or certification could help build awareness and give it more value.

Simon Boas Hoffmeyer, Carlsberg: I agree, the first blocker is that there is no common definition. If people don't know what they're supposed to implement, then they can't do it.

But actually, I don't think we should rush into certification.

Right now, we need to align on what we want to change on the farm, start measuring it, and understand which practices really work in different contexts—sand, clay, different crops. For us, the SAI platforms initiative Regenerating Together is that standard. It will keep evolving and changing, but it offers an extremely valuable starting point for anyone interested in regenerative agriculture.

And yes, I know not having certification might slow things down, especially when it comes to justifying a price premium. So for those that have not started, a first focus on higher-margin products where the premium is easier to absorb might be a solution to make the business case stack up.

“What we need first is a standard—a clear, outcome-based framework that focuses on real change on the farm. The thing with Regen Ag is that it's deeply tied to local soils and crops. If you create a strict certification too soon, you risk making it too rigid, forcing everyone into the same system that might not work for their land.”

Simon Boas Hoffmeyer



**Regenerating
Together
Programme**

BY SAI PLATFORM

What has sourcing regeneratively taught you? What were the mistakes you made or lessons you learned?

Olivier De Brauwere, BBP:

First, I want to say, I don't blame the mistakes we made at all. First thing we learned: barley for brewers is actually a bad deal for farmers. Brewers have high expectations and pay a low price.

That's why many Belgian farmers stopped growing it. Why are expectations so high? Because barley is the main ingredient, and even small changes in things like protein levels can affect taste, alcohol, viscosity, and foam stability.

Our first big batch of regen barley didn't meet brewing standards. Looking back, better communication about those differences would have helped. But Belgomalt reacted quickly — we worked together and stayed aligned on the goal: making regen barley a big part of Belgian production. Today we're very happy.

The other learning: the regen farmers we work with are all in a very small region. That means big weather events can hit the whole supply.

Simon Boas Hoffmeyer, Carlsberg: We learned that soil is alive — and every soil, rotation, and crop system is different. There's no one-size-fits-all solution.

Another big learning: wide stakeholder engagement is crucial. For example, we've spent a lot of time talking with farmer groups, experts, legislators and other standards such as the organic movement.

“We, for example, make it clear to the organic farmers that we're not trying to compete with organic farming — we're trying to transform the 90% of farming that's still conventional.”

Also, working with big companies, we've seen skepticism from the ecosystem. Some people ask: is this just greenwashing?

So being very transparent about the challenges, about why we believe in Regen Ag, is really important. It's not a niche play — it's about mass change.



Let's go back to economics: is having a consumer premium an unlocker to a viable business case?

Olivier De Brauwere, BBP: So far, we were not successful. Our TerraPils was called “Regenerative Pils” and people were like, “Oh cool, it’s regenerative for my body.” Nobody understood — it was very confusing. We stopped using “regenerative” on the front label. Now we only mention it on the back.

People buy beer for the taste first. The story and the values come second, and that’s just for a small minority. There’s no extra price we can factor in.

Peter Willaert, Duvel Moortgat: Yes, honestly, the beer consumer is really not busy with sustainability. Taste and quality are still the dominant drivers.

For some of the brands in our portfolio however, like Chouffe, we want to inspire the customer with a closer link to nature. The image is one with nature, you drink it with friends when you go camping, things like that.

So we’re experimenting with how to bring the message to those consumers. Do we use a logo like “Made with Regen Barley”? A QR code? But how do you explain it? It’s all pretty technical.

I’m following closely what Carlsberg is doing with the launch of their 100% regenerative beer in Denmark — it’s really interesting.

Simon Boas Hoffmeyer, Carlsberg: Yeah, for us, that beer was mostly a way to show that we’re not just talking about fancy targets — we’re actually doing it. We brewed just 3000 liters, a special edition to prove it but it was only sold at the Danish ‘Democracy Festival’ and in our brand store at Home of Carlsberg in Copenhagen.

For the future, we are exploring all the options — from very specific, on-brand communication to mass-balance approaches where we transform the supply chain but don’t necessarily label it at the consumer level. We need to stay flexible. If a customer — meaning a big retailer or supermarket — says, “We want a fully traceable SKU and we’ll give it preferential shelf space,” then of course we’ll look into moving from mass balance to full traceability.

But at the end of the day, consumers are very quick to say they want sustainable products — but they don’t want to pay more. They expect us to fix things and then leave them to enjoy their beer in peace. That’s the reality.

Olivier De Brauwere, BBP: People are not going to pay more. But maybe that’s not the point.

“Maybe the biggest benefit of Regen Ag is actually B2B — for customers like Delhaize, Carrefour, distributors. They all have sustainability targets, and having suppliers who are ahead helps them achieve those.”

Simon Boas Hoffmeyer, Carlsberg: Yes, for us, the main driver is creating resilience. Regenerative agriculture offers more stable yields, better biodiversity, lower variable costs — and ultimately, better farms and better farmer incomes. That’s why we’re doing this. We’re not doing it for a consumer label. If that comes later, fine. But the main point is to build a more resilient system. And honestly, we’re still in the early days. We’re staying humble about what the final model will look like.



[from Duvel to Carlsberg]

So Simon, how are you defending the business case internally?

Simon Boas Hoffmeyer, Carlsberg: Well, first of all, I have to admit — I’m kind of cheating because we’re a foundation-owned company. That gives me a significant advantage compared to fully floated peers. Our foundation holds 70% of the voting rights. It was created to ensure we keep brewing great beer, but also that we do it in a more sustainable way. So basically, at each General Assembly, I’m really only answering to one shareholder — our foundation — and resilience is absolutely a key priority for them.

“Our foundation says: We’ve been the custodians of Carlsberg for 178 years, and we want to ensure there’s still a Carlsberg in another 178 years. That’s an essential part of our business case.”

Being mindful of environmental and societal changes is at the core of that long-term view.

So how do I defend the business case? Resilience is central, of course. But beyond that, there’s a deep belief in Carlsberg that we need to actively contribute to preventing the climate catastrophe we’re heading towards.

And honestly, you don’t go a month these days without seeing a climate disaster somewhere, even in our own markets.

We’re present in places like Laos, where we saw the terrible impact of Typhoon Yagi last year. We’re in Italy, where flooding has become more frequent. And across Southern Europe, we’re seeing record-breaking heatwaves.

We’re also deeply connected to the value chain. And in that chain, there are livelihoods. People depend on us and our products. So building resilience across that system is not just about us — it’s about the farmers, the suppliers, the communities.

In the end, it’s all connected: meeting our climate targets, creating price stability over time, ensuring farmers can continue growing barley in the future. That’s how we build the full business case.

And by the way, we see the premium on regenerative agriculture as a temporary transition premium — not something that should last forever.

If the industry moves together supported by legislators, and we don’t just focus on barley but also include crops like rapeseed, sugar, etc., in the same system, then we really believe this can scale. It can have the positive climate and nature impact we need — and it can be cost-competitive.

So collaboration with other players is a way to accelerate?

Peter Willaert, Duvel Moortgat: Yes, absolutely. And not just between corporates — we also need private and public collaboration.

There's actually a very good report from Deloitte on the state of regenerative agriculture in Europe. One of the key conclusions is that for farmers, the business case has an average payback time of seven to fifteen years, depending on the level of financial support and the specific government actions in each country. So we really need government support. We need funding to help us make sure this transition happens.

Personally, I'm waiting for the European Union to put more focus on regenerative farming and carbon farming. To the example of the energy transition, the agricultural sector chain needs some financial help to cover the premium cost, make those investments and help the farmer to carry the risk of the transition.

“As brewers, we can only be the catalyst of the transition, pulling all the noses in the same direction and aim to accelerate the transition — on behalf of the farmers, the final consumers, and the beer brewers. That’s how we can make it a win-win relationship and speed up the transition to regenerative practices.”



Do you have any advice for others kick starting their regenerative sourcing journey?

Peter Willaert, Duvel Moortgat: Don't overthink it. Just try it. Go to the farm, talk to the farmer.

Start small — the rest will follow. The fact that we don't have clear guidelines, standardisation, or a ready-made business case should not stop you from getting started.

We need to work together as brewers. We need to send one message to the co-ops, to the farmers, to the market: we are pioneers in this, but we need to make the transition feasible for the entire value chain.

Olivier De Brauwere, BBP: You should do it! I really believe it's the rational long-term choice. In the long run, regenerative will be less expensive than conventional because it's more resilient.

“You need a good sponsor inside your company — How do you convince someone? Take them to the field. When people see the reality with their own eyes, it hits them: “Wow, actually, it's bad.” “I need to do something.”

Also, instead of buying carbon credits somewhere else, the best thing is to actually buy regenerative barley. Whether it's local or not is less important than the fact that you're buying regen. For big companies, that can really move the needle on CO₂.

Simon Boas Hoffmeyer, Carlsberg: I always come back to one question, whether it's to convince someone inside the company or outside.

“What is the cost of inaction? What kind of future are we looking at if we just sit back and do nothing?”

Look at the instability of yields, the price fluctuations in key agricultural commodities, and the European State of the Climate reports. The climate is changing — visibly, concretely, measurably.

That's where you need to start. If someone is still too afraid to take the first step after seeing those facts — well, maybe they just haven't read the report carefully enough.



Thank you & cheers.

Thank you to Peter Willaert, Olivier De Brauwere and Simon Boas Hoffmeyer for taking the time to answer our questions.

Contact

Maud Lesure

m.lesure@soilcapital.com

Interview & Editing: Standard Deviation

Photo credits: CultivAé, Soil Capital, SAI



SOILCAPITAL

Lessons from
the Doers