



Securing the shelf starts in the soil: why regenerative agriculture should be part of the retail strategy

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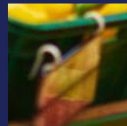
Charlotte Bande
Global Food & Beverage
Sector Lead
Quantis



Florence Di Nicola
Deputy General Manager
2050NOW La Maison
(Les Echos-Le Parisien)

Agenda

1. Introduction
2. The cost of inaction
3. The role of coalitions of action





Why regenerative agriculture?

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Climate shocks are fundamentally reshaping retail supply chain and financial risk



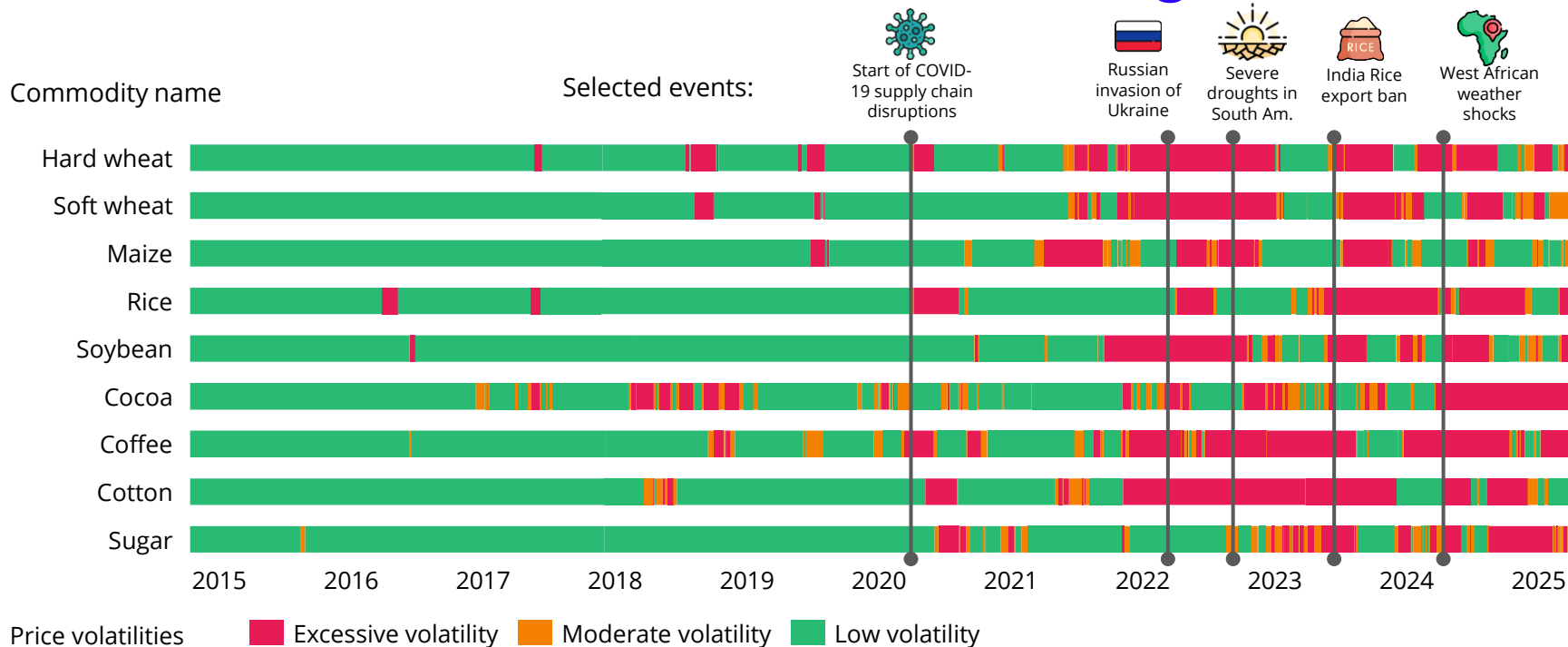
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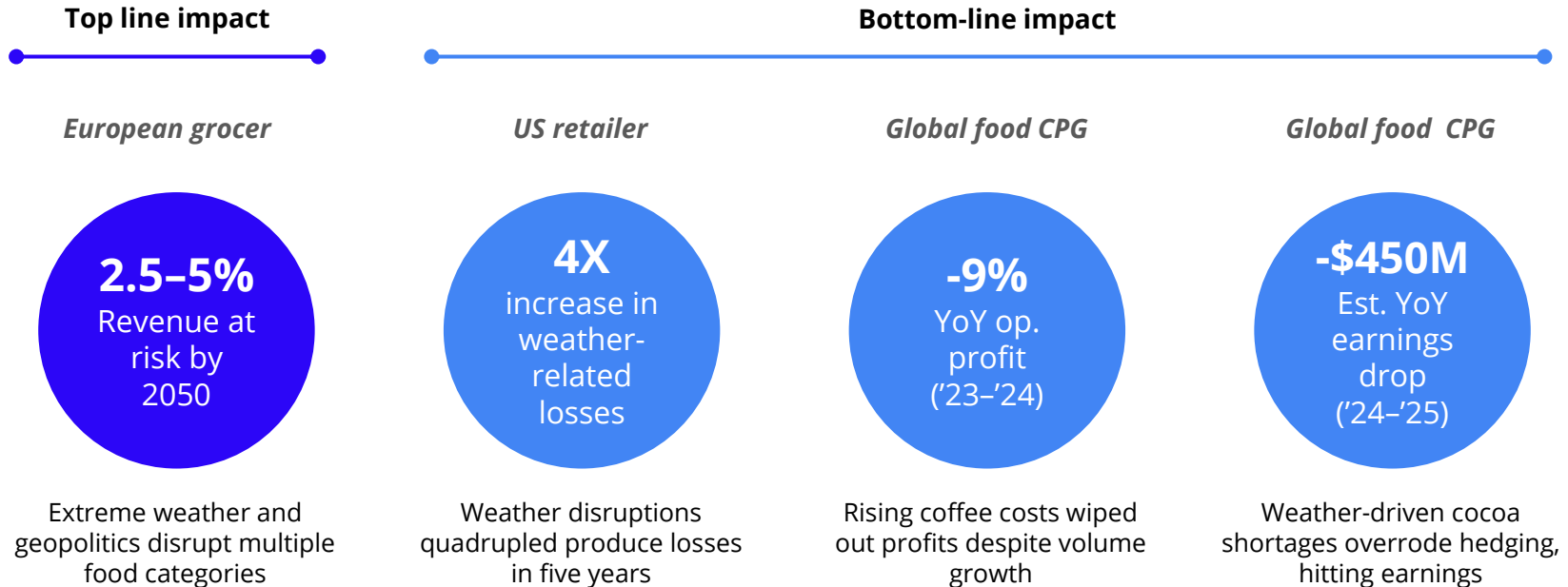
Agri-commodity price volatility is accelerating, with climate shocks as a contributing factor



Note: The graph shows periods of excessive price variability as defined by IFPRI - high volatility occurs when extreme price increases occur excessively (probability less than 2.5%), while moderate volatility indicates above-normal fluctuations (probability between 2.5% and 5%); Source: IFPRI Food Security Portal



Climate shocks are now impacting retail financial performance - and the pressure is accelerating



Retailers' performance and financial resilience depend on regenerative agriculture



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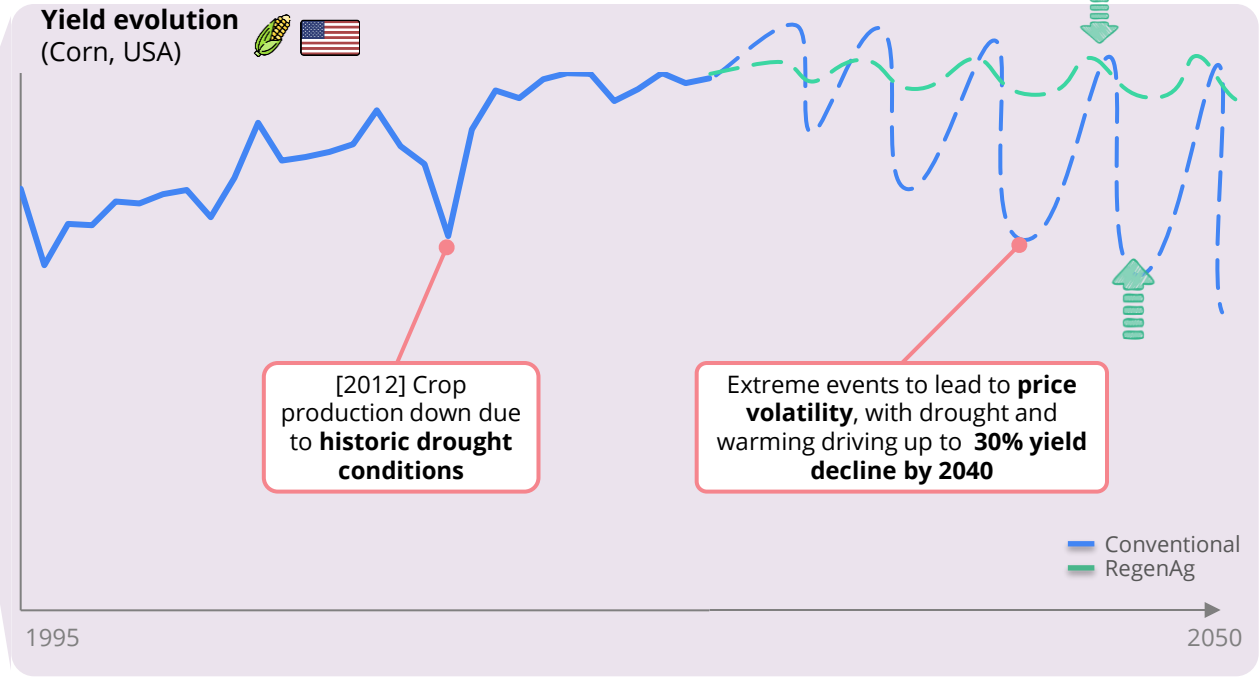
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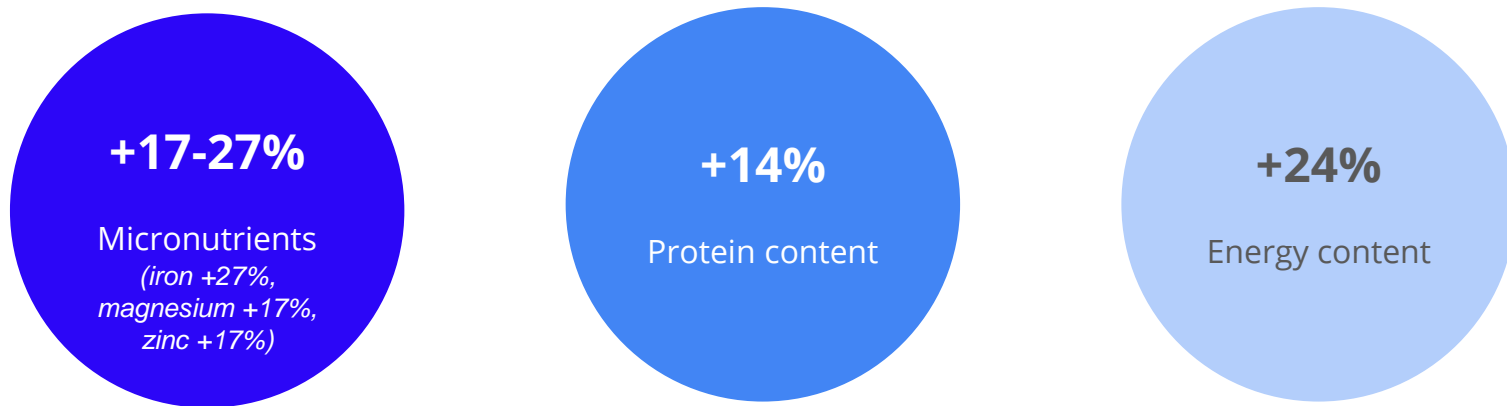
Regenerative agriculture can stabilize yields, costs, and supply under climate pressure

	Yield Risk	Price Volat.
Coffee	High	High
Cocoa	High	High
Corn	Mid-High	High
Cereals	Mid-High	Mid-High
Rice	Medium	Mid-High
Palm Oil	Medium	Mid-High
Sugar	Medium	Medium
Soybeans	Medium	Medium



Healthier soils, healthier food: the power of crop rotation to create value for customers

Compared to cultivation without crop rotation, diversified crop rotations (i.e. alternating crops on the same field over time) deliver measurable improvements in food nutritional quality



From healthier soils fields to healthier food: capturing consumers' willingness to pay for health



Regenerative agriculture helps both mitigate risks and bring competitive opportunities

Regen ag supports security of supply

- Stability and predictability of supply costs
- Reduced profit margin pressure

Regen agriculture can drive consumer value

- Research into improved nutritional profile
- Faster sales growth for sustainably labeled products at constant price

Retailers can unlock value by supporting the transition, using **private label** as the first lever



From fragmented responses to collective action on agri-food supply chain resilience



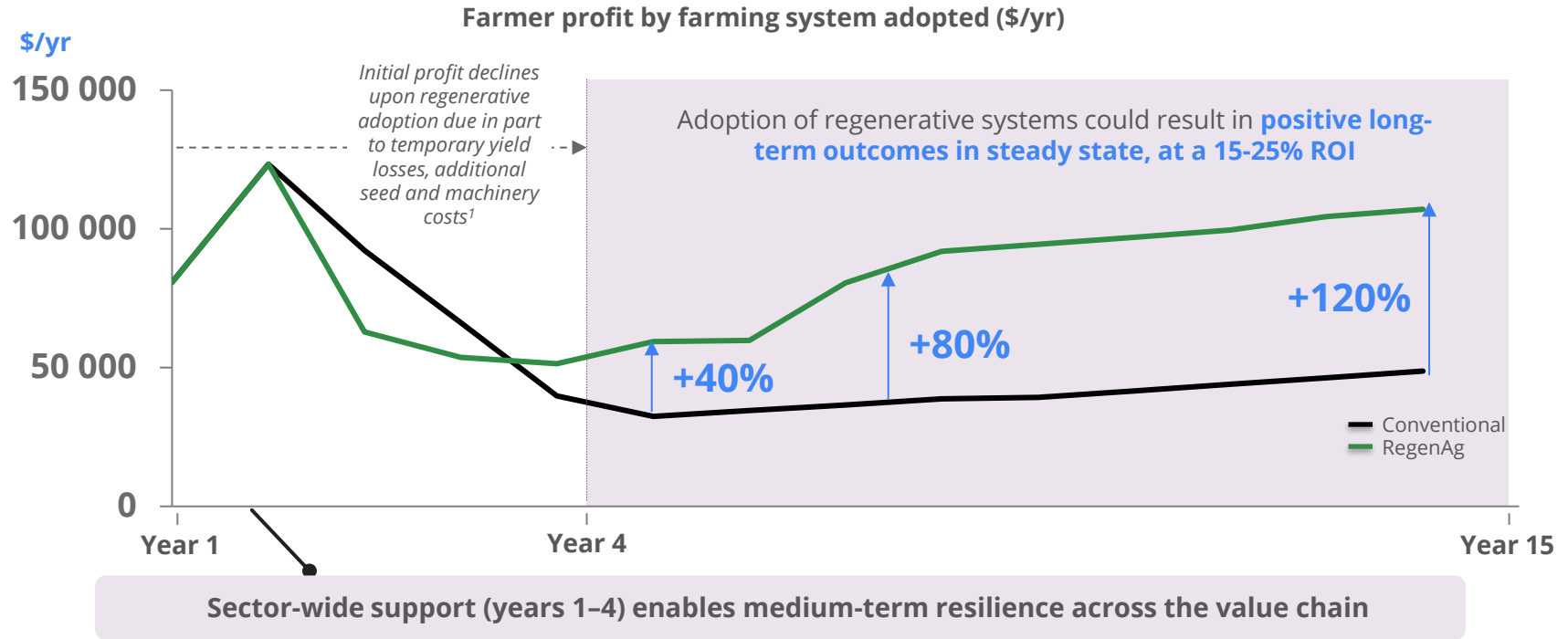
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Supporting the transition is essential to capture long-term profitability gains



1. Transitional yield losses due to initial impacts from introducing soy to the dryland cash crop rotation.

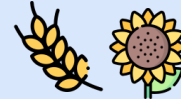
Regenerative agriculture in action: two concrete examples (among others)



Value chains



Dairy



Cereals and oilseeds

Geography



Targets

30% reduction in emissions intensity (2030)

500 000 tons RegenAg from 600 farmers (2026)

Financing

0.03-0.04 € / kilo of milk

100-150 € / ha

Measuring

200 data points collected for each farmer (2026)

700 000 data points (2026)



An expanding Do Tank for leading agri-food, finance, and science players

INDUSTRY PLAYERS



Moët Hennessy

LVMH

INVESTORS



EXPERTS



ORGANIZERS



Join the movement

And access the presentation



Thank you



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