

FARMERS' HORIZON

1 year after farmers' protests



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after farmers' protests | April 2025 |
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FARMERS AND AGRICULTURE IN THE FOREFRONT

In end of 2023 and early 2024, multiple European countries faced protests from the farming population, getting full attention in the medias around their conditions and revendications.

As not particularly new in the farmers community, these protests gained particular intensity and exposure with some violent protests being recorded. They were reinforced through protests in neighbouring countries, media attention and prompt political reactions.

Despite revendications being quite different from one country to another, some similarities could be addressed around the farm incomes' struggles, tighter

environmental regulations and the unfair competition from other countries.

More specifically, farmers complained about the end of fuel subsidies (France and Germany), the needs to reduce livestock farming emissions (Netherlands), droughts / water restrictions (Spain, Greece, France), inflation, import competition (Poland, Bulgaria) etc.

In this context, Ipsos Agriculture led a study in France at this period of protests and gathered more precise information on the protests, confirming some already existing unresolved issues that happened to being properly expose in early 2024.



AFTER ONE YEAR, WHAT OUTCOME?

Ipsos study also revealed some opportunities identified by farmers and general population to concrete solutions in helping farmers with their struggles.

Despite a complicated image of the farmers' job perceived by the rest of the population and issues carried by inflation events, consumers and farmers agreed on the need to reduce imports from countries with different production norms, to ensure a better share of profit among the value chain at the benefit of farmers and reducing the administrative constraints that farmers have to constantly face.

One year after the events,

CropLife Europe, with the help of Ipsos expertise, take the pulse of the farmers population and addressed the current situation.

The objective of the study is to communicate on how farmers are doing today and how they perceived the political actions that the European Union undertook this year to ameliorate their situation. CropLife Europe wants to know whether they feel that they now have a better farming condition and how they project in the next years regarding this aspect.

Are farmers feel better now or are they still on the verge to protest again?

A photograph of a farmer wearing a cap and boots, crouching in a field and sowing seeds. In the background, there are several large metal grain silos under a sunset sky. The image has a teal diagonal graphic element in the bottom right corner.

THE CHALLENGE FOR *CropLife Europe*

**Have the farmers
struggles in early 2024
been resolved by the EU
recent actions or are
farmers on the verge to
protest again?**

RESEARCH OBJECTIVES



EVALUATE

The current situation of the farmers and their operations

If farmers have identified a real change in their situation in the past months

How likely they are to protest again



DETERMINE

How farmers perceived the measures from EU authorities and local governments

How farmers project themselves in the next 3 to 5 years regarding their financial prosperity



IDENTIFY

Farmers' needs from public or private market players

Difficulties that farmers are still facing today

Key opportunities for players to help them

KEY QUESTIONS

One year after the protests, do farmers perceived a change in their financial situation?

Are farmers satisfied with measures taken by the EU and local authorities?

What further actions should be undertaken in order to support the EU farmers coping with their challenges?

Survey design

Reminder

SAMPLE

- **Selection of the respondent :** Random sample established from a broad list of contacts generated on **web intercept method**
- Farmers will be **owners or co-owners** of their operation, intending to still farm in 3 years
- **Countries:** 9 countries - France, Germany, Romania, Poland, Italy, Spain, the Netherlands, Belgium, Ireland
- No specific cut-offs in terms of farm sizes to be representative of all farmers, including family farms

TARGET

- **1998 itws in total with** 255 in France / 253 in Germany / 251 in Spain / 230 in Italy / 275 in Poland / 226 in Romania / 169 in Ireland / 165 in Belgium / 174 in The Netherlands
- **Incidence rate: 100% (no specific targets and pre-targeted farmers)**
- **National representative in terms** of: regions, farm sizes, age based on Eurostats official statistics
- Soft quotas on age (monitored during the field)

DATA COLLECTION

- **Questionnaire length: 12 minutes** - The questionnaire was shortened during fieldwork
- **Fieldwork dates:** 5 mars – 3 avril 2025
- **Data collection:** Online.
- **Response quality control methods:** monitoring of participants' response behaviour (identification of responses that are too quick or careless, e.g. ticked in a straight or zigzag line)

DATA PROCESSING

- Weighted sample to have a representative sample at the end
- Method used: Rim Weighting Method
- Weighting criteria: **regions, farm size, age**

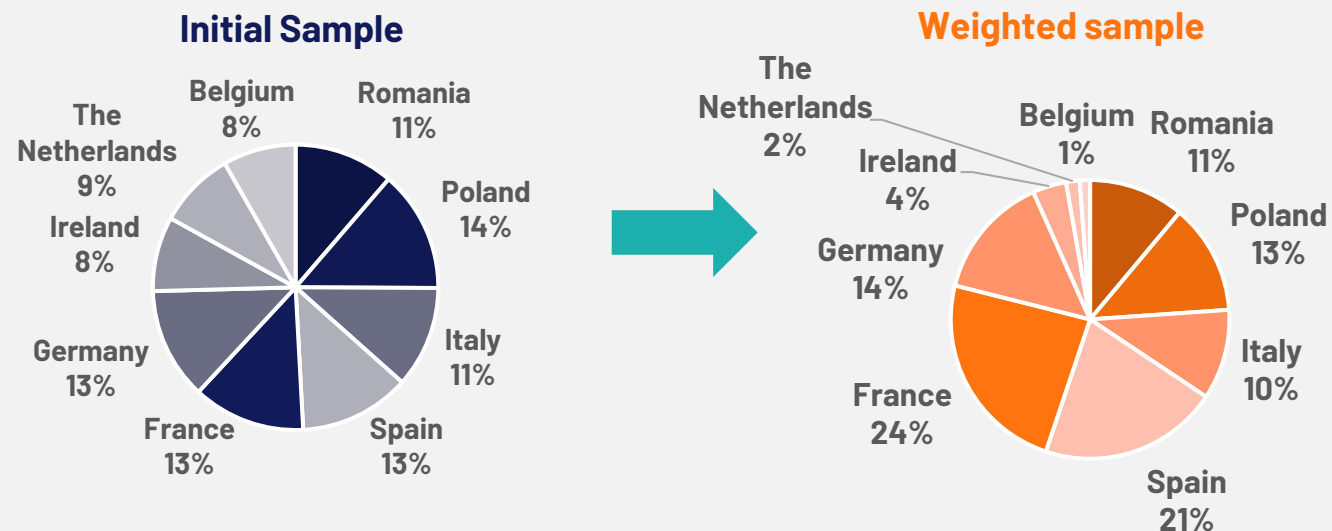
A weighted sample

Why have we weighted the sample?

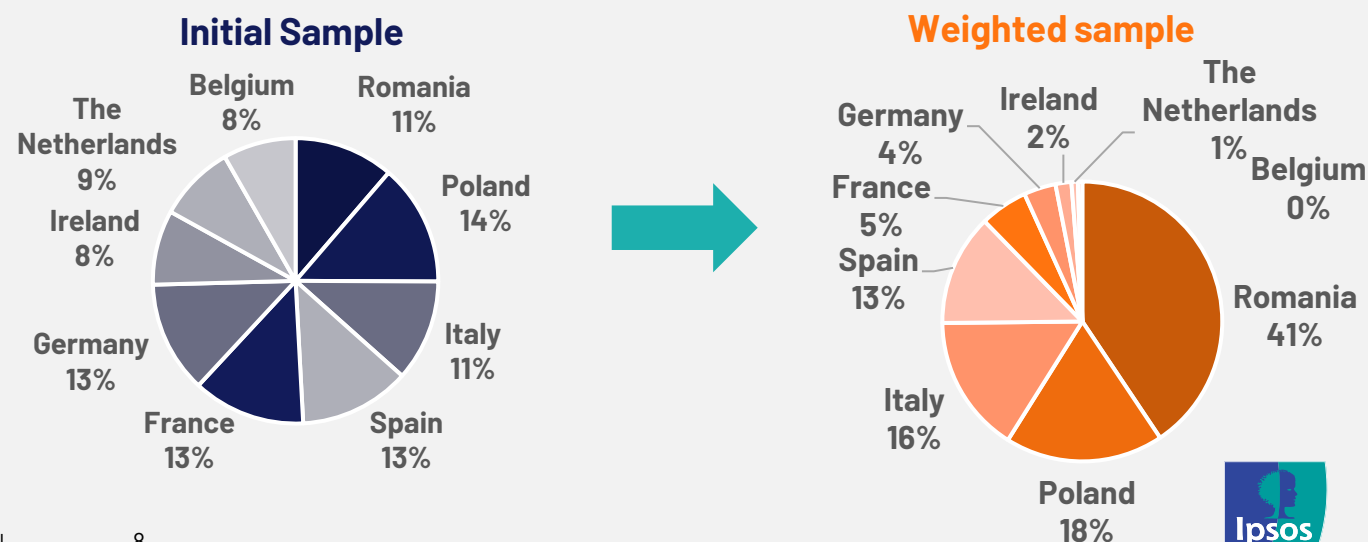
1. To be **representative of the European farmers' population** in terms of acreages
2. Why did we weight on acreages rather than number of farmers in the respective countries? Because weighting on number of farmers would have given a **too high voice towards Romania and Poland** where family farms are still numerous
3. Weighting on arable acreages allow a **more balanced sample** overall while still being representative of the more **professional farmers**.

Within the countries themselves, we have weighted on the same on official statistics (Eurostats) on age, the regions and the farm sizes.

Weighting in acreages



Weighting in number of farmers



Questionnaire

Reminder

Image generated by AI



Farmographics

- Farm size, main productions
- Age / gender / regions / intent to farm in the next 3 years, experience in farming, position in farm
- Type of vegetal and animal productions in operation



The farmers of today - Context

How do farmers feel today and reasons of optimism / pessimism

Evaluation of their financial situation

Difficulties faced / What changed in their operations since last year?

Crop protection solution availability on market

Pest and diseases management/
Agronomics practices and new technologies adoption



Focus on the protests

Have they participated in the protests in past 12 months? How were they implied?

What impacts did they perceive from their protest?

Improvements perceived (worse / same / better situation than before) in general and on several elements

Awareness & Satisfaction on EU and local political actions

Image generated by AI



Projections in next years

How likely they are to protest again in the next months?

Farm objectives for next years, perspectives to short and long-term (optimism / pessimism / uncertainty)

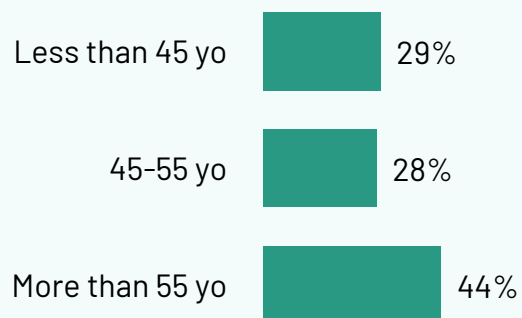
Abandon reasons

What should be the top priorities of the EU?

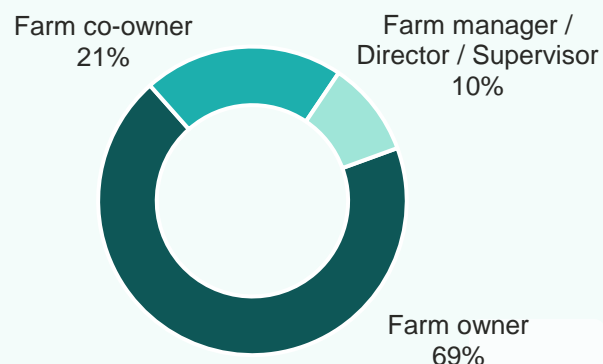
Profile – Total



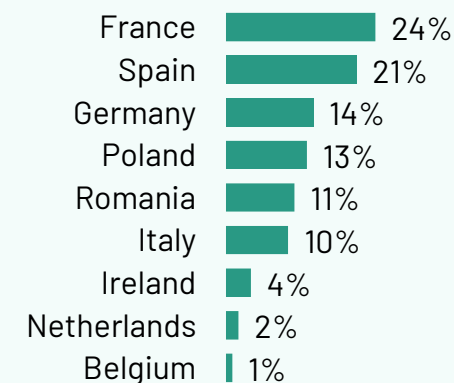
AGE



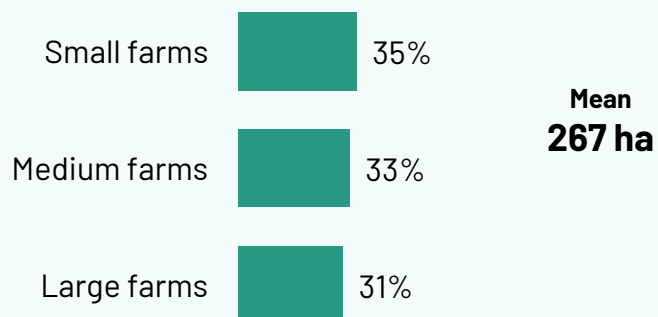
POSITION IN FARM



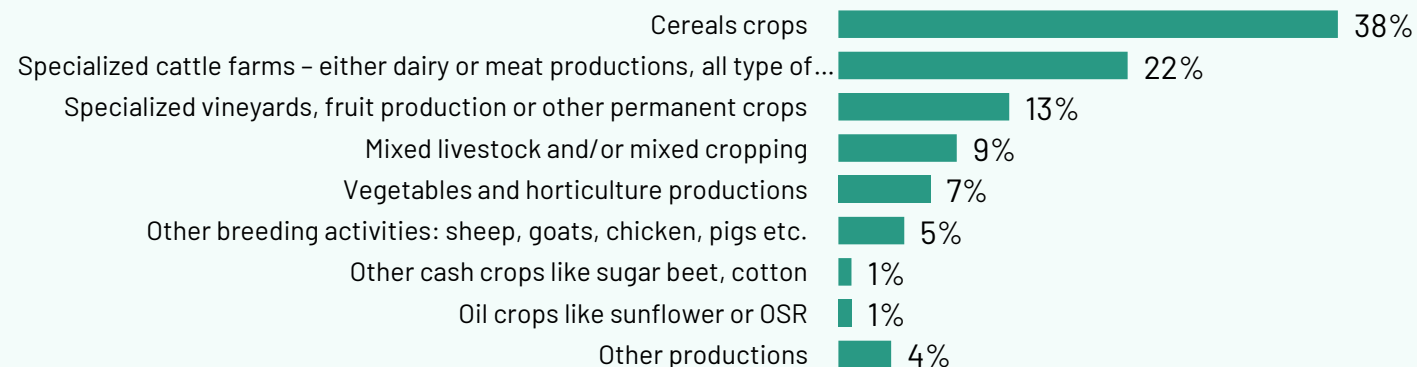
COUNTRY



FARM SIZE



MAIN PRODUCTIONS



Base: 1998 – All

A2: How many [ha/acres] of agricultural land did you farm in total in 2024? / A4 : Are you the...? / A5 : How old are you? / A6 : How many years of farming experience do you have ? / F2 : Which of these activities best describes your main production?

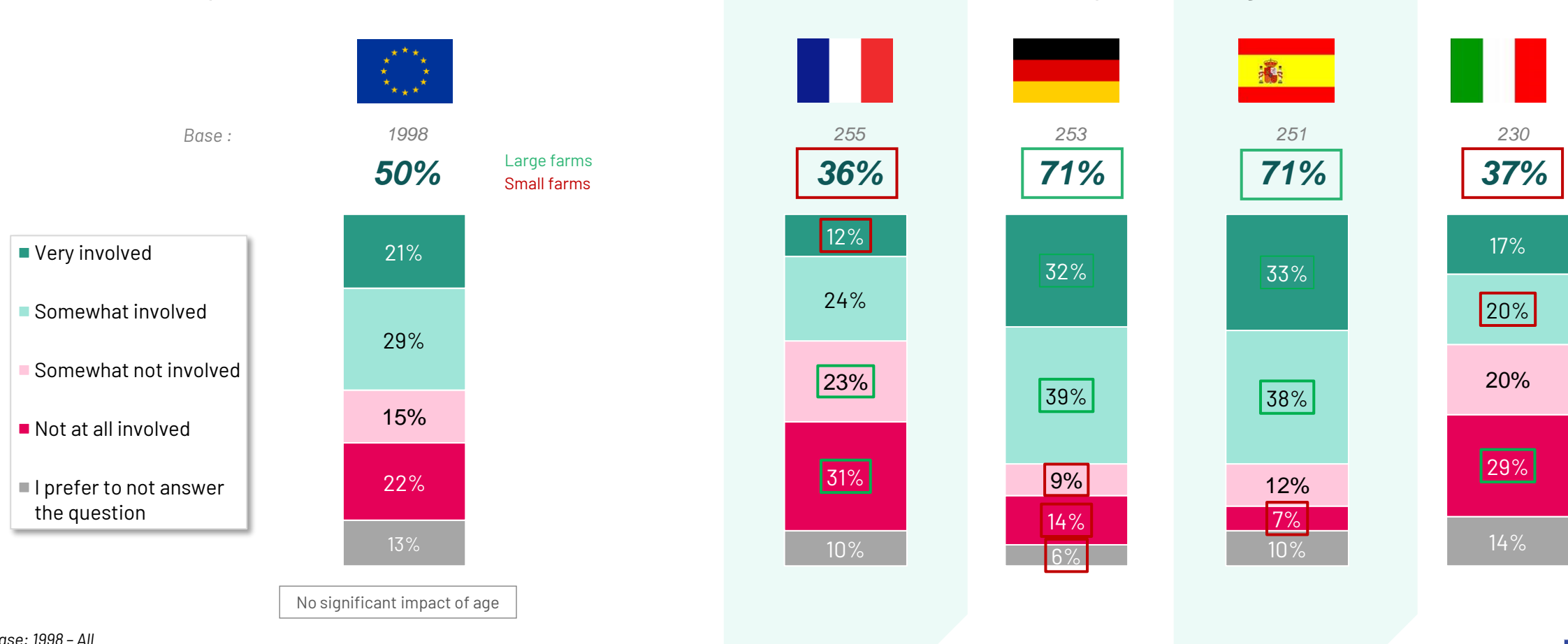
The farmers protests: High participation but disappointing impact

- Half of farmers participated in last year's protests, all generations alike
- If farmers noted an impact on how they and their profession are perceived by the population, no concrete economical or political impact has been observed
- Overall, more than 90% of farmers are unsatisfied by local and European political actions



Participation in last years' protest - 1/2

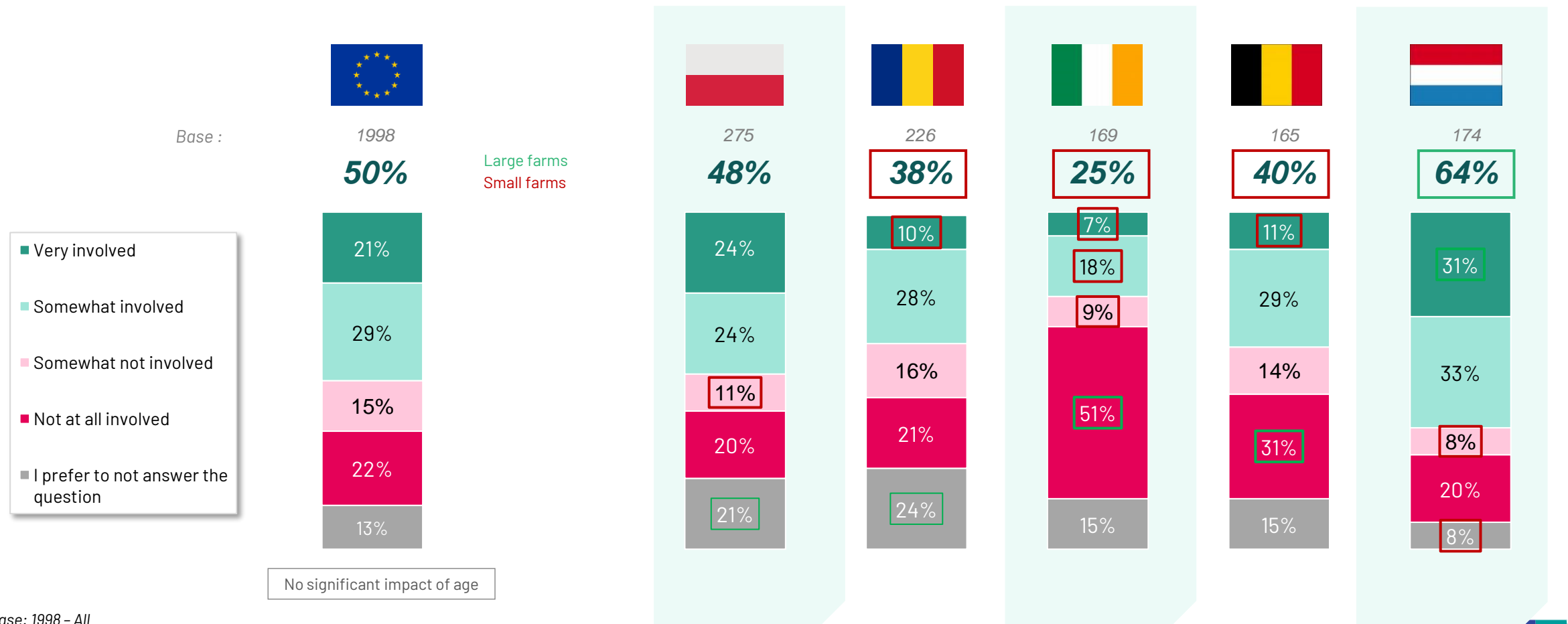
Half of European farmers declared having participated in the protests with different level of engagement per country and it involved all generations of farmers. The most engaged farmers were the German, the Spanish and the Dutch with more than 2 out of 3 farmers protesting.



Base: 1998 - All
C1: If you participated in last year's farmers protests, how would you evaluate your level of involvement?

Participation in last years' protest - 2/2

At the opposite, French, Italian, Irish and Romanian farmers were less engaged with 25 to 40% of participation in last year's protests.

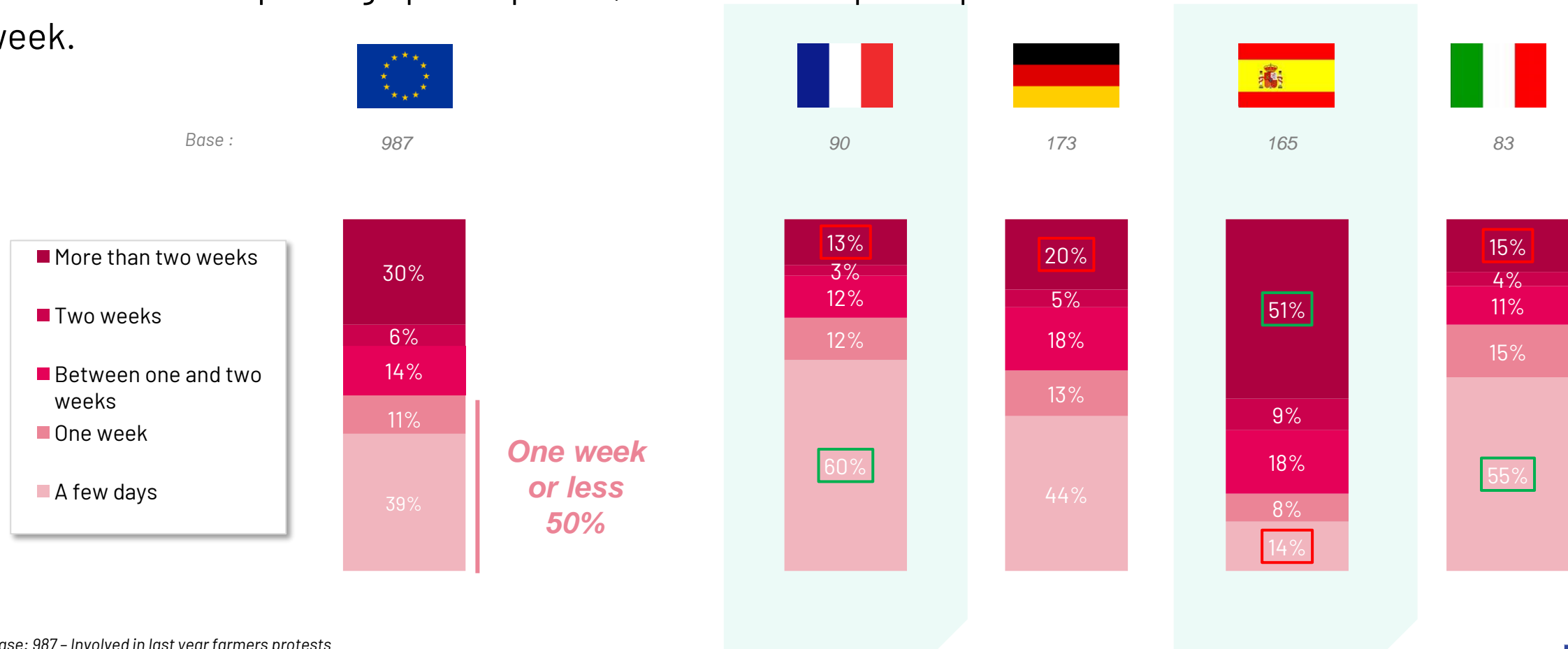


Base: 1998 - All

C1: If you participated in last year's farmers protests, how would you evaluate your level of involvement?

Time length of involvement - 1/2

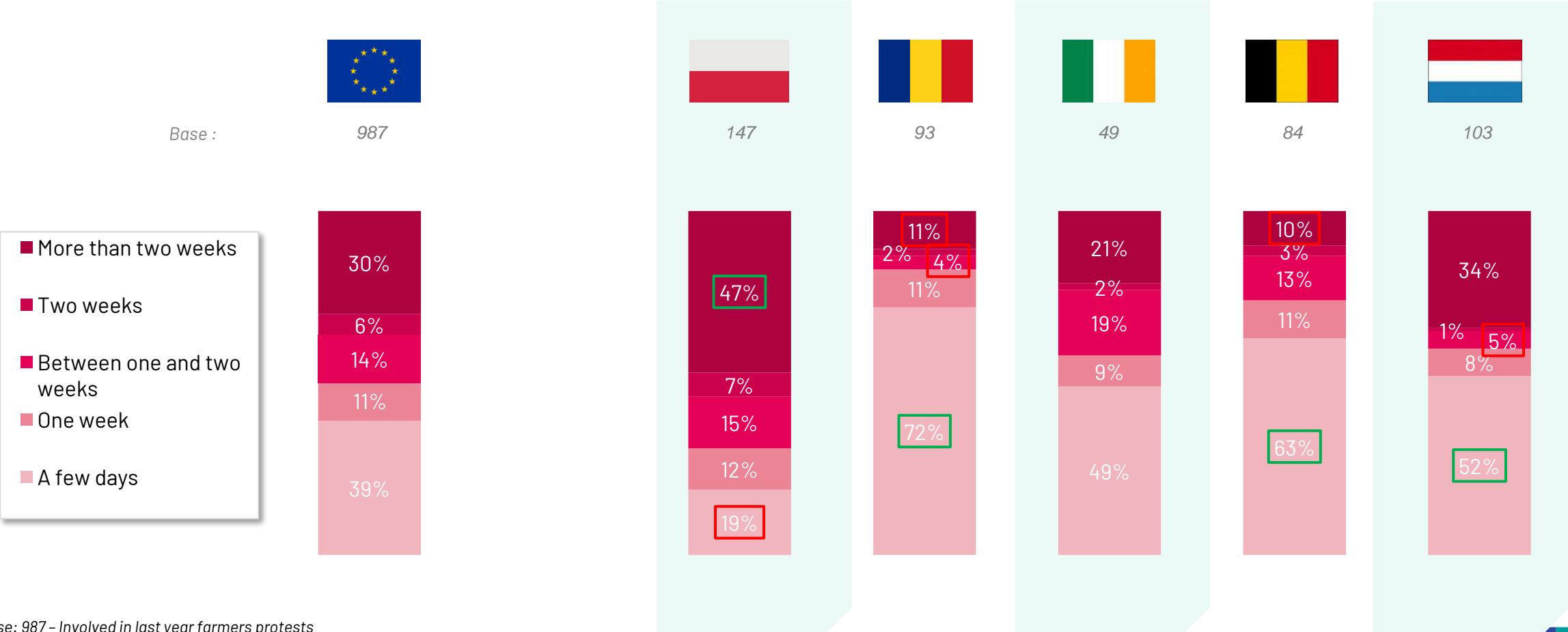
If half of farmers was engaged one week or less in the protests, around one third declared higher commitment of 2 weeks and more, especially in the most virulent countries being Spain and the Netherlands. Despite high participation, most German participations were short and lasted less than a week.



Base: 987 - Involved in last year farmers protests
C3: How long were you involved in the 2023-2024 farmers protests?

Time length of involvement - 2/2

At the opposite despite a moderate participation, Polish farmers were engaged on a longer time length. France and Belgium had among the shortest participations.

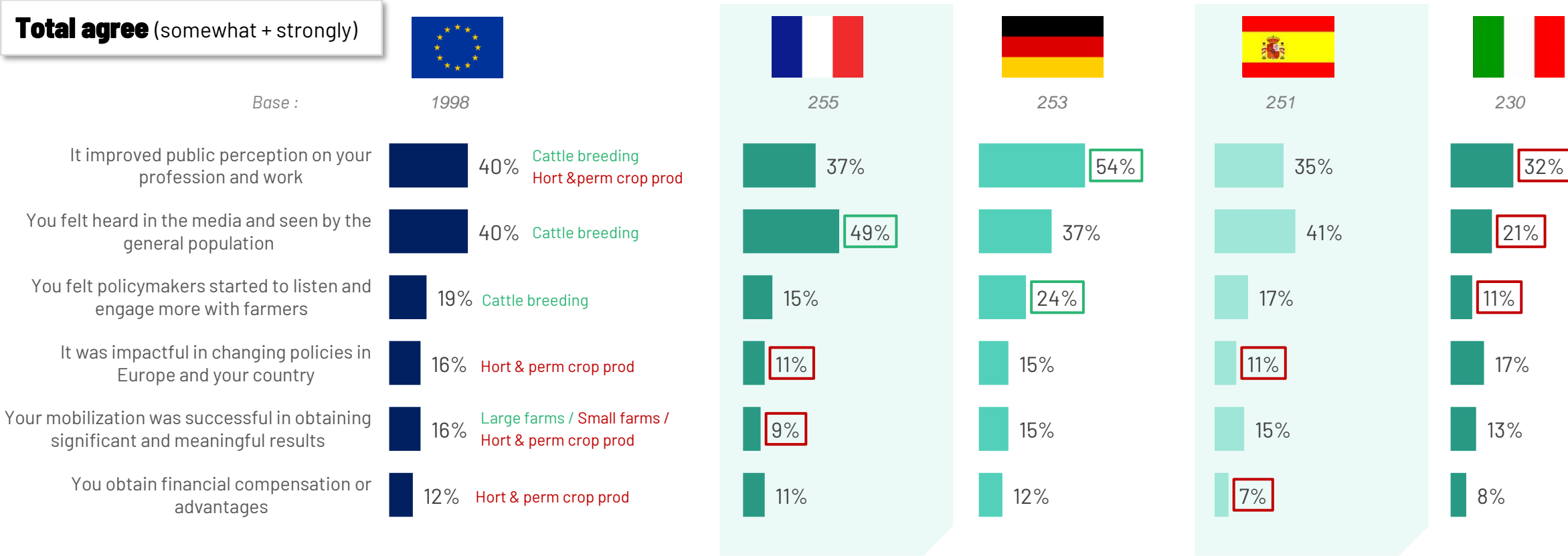


Base: 987 - Involved in last year farmers protests
C3: How long were you involved in the 2023-2024 farmers protests?

Perceived impact of the protests - 1/2

After one year, farmers minimize the influence of the protests on their daily lives. Some of them agreed on the protests being a great spotlight on the profession but most regret the lack of meaningful effect through policies or financial support.

Total agree (somewhat + strongly)

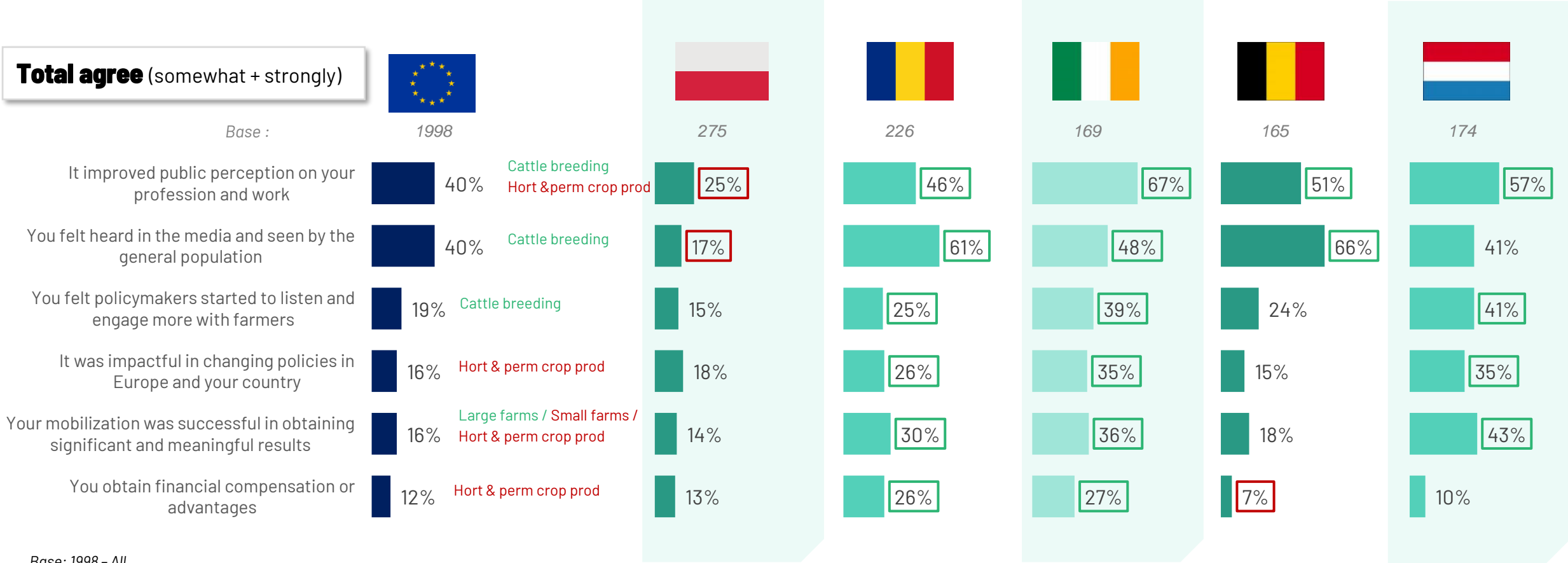


Base: 1998 - All

C4: Here are sentences that could be said about the impacts last year's farmers protests had for you and your profession. For each of them, specify if you totally agree, quite agree, quite disagree or totally disagree.

Perceived impact of the protests - 2/2

Farmers are a little more positive in Romania, Ireland, Belgium and the Netherlands but only a minority stated seeing meaningful impact in their respective countries.

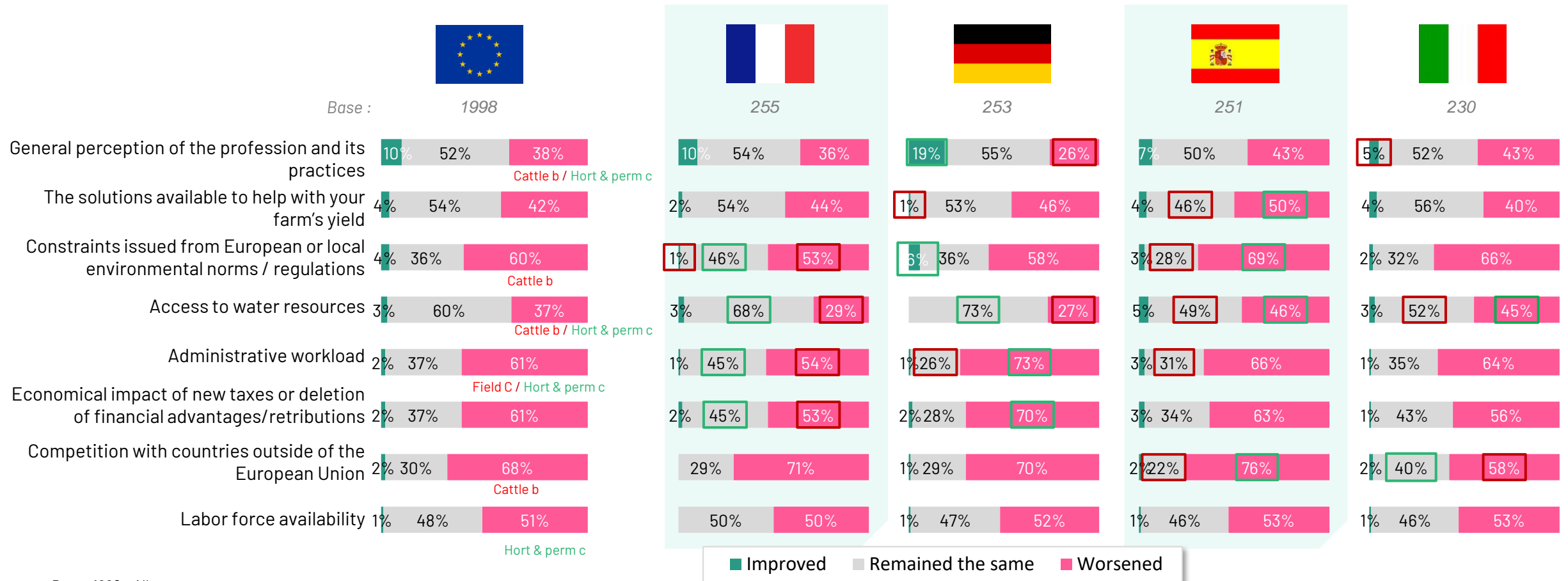


Base: 1998 - All

C4: Here are sentences that could be said about the impacts last year's farmers protests had for you and your profession. For each of them, specify if you totally agree, quite agree, quite disagree or totally disagree.

Perceived changes since farmers protests - 1/2

Farmers are quite negative when it comes to the changes perceived since the last protests and most of them perceived a worst situation regarding the international competition, the regulation, the taxes or the administrative workload.

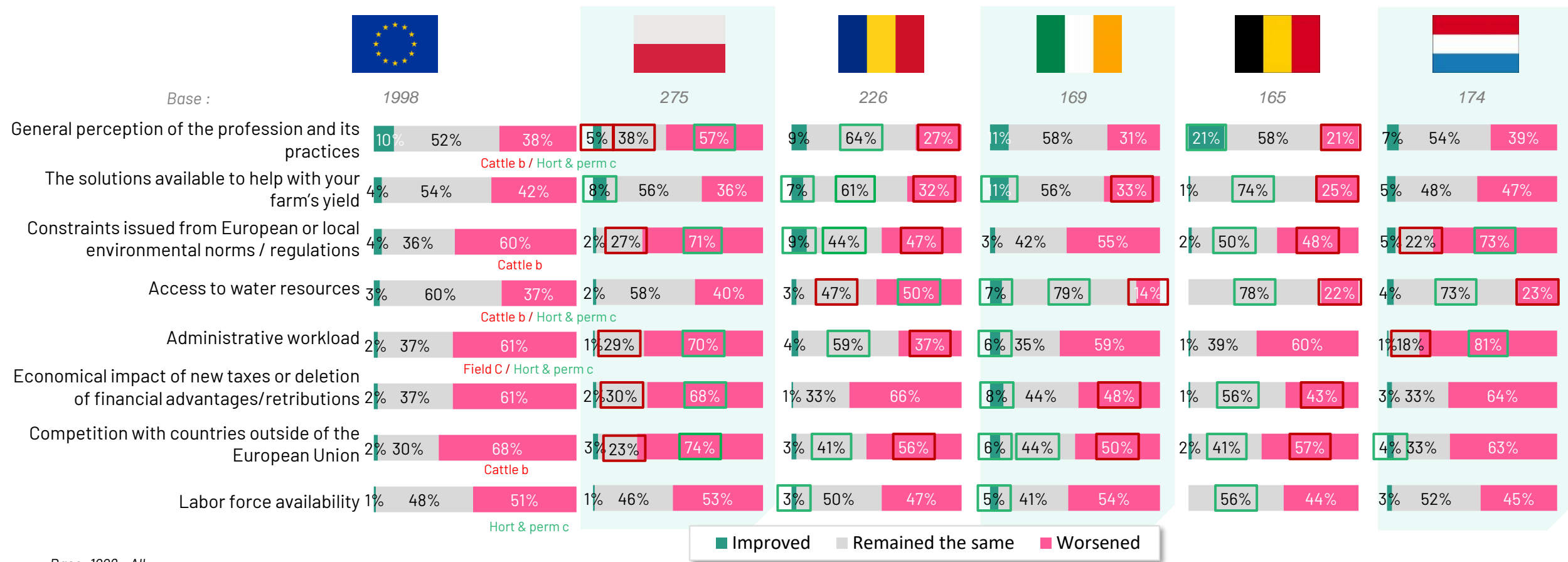


Base: 1998 - All

C5: Regarding the below propositions related to hot topics mentioned by farmers during the 2023-2024 farmers' protests, would you say that the situation has improved, remained the same or worsened since?

Perceived changes since farmers protests - 2/2

Only the access to water resources, the perception on their profession or the solutions available to help with their yields are perceived mostly consistent since last protests. Farmers in Romania, Ireland and Belgium are generally less negative that in the other European countries.

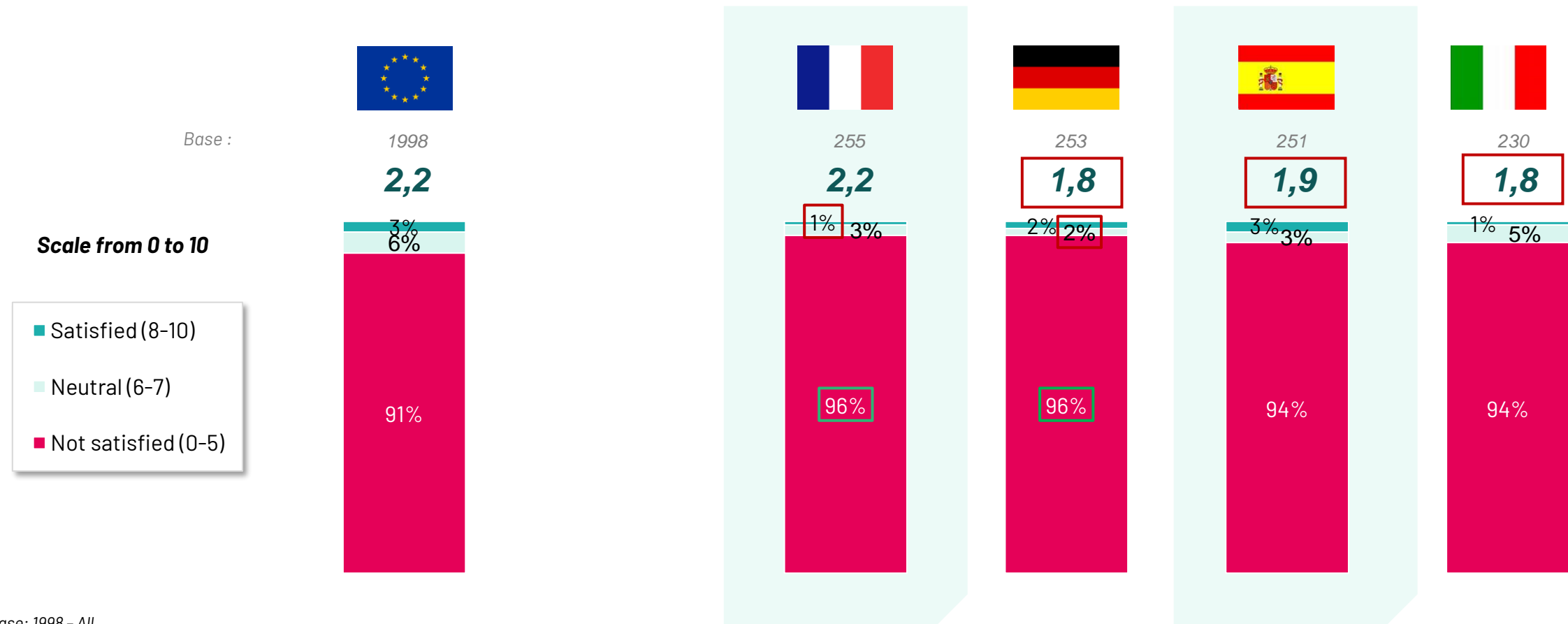


Base: 1998 - All

C5: Regarding the below propositions related to hot topics mentioned by farmers during the 2023-2024 farmers' protests, would you say that the situation has improved, remained the same or worsened since?

Satisfaction on political actions undertaken - 1/2

And without any surprise, the satisfaction regarding the political actions are considered unsatisfactory by nearly all European farmers by its great majority.

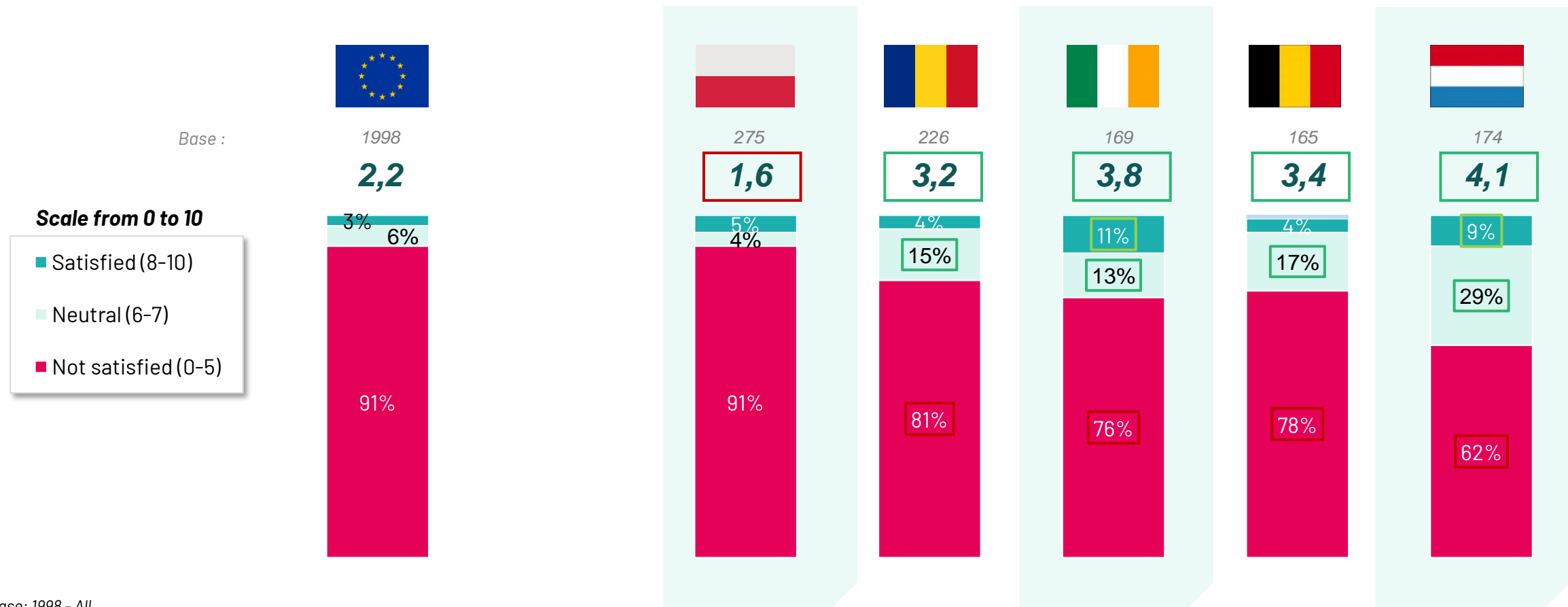


Base: 1998 - All

C7: Overall, how satisfied are you about the actions that were undertaken by local or European political authorities? Please enter a grade from 0 to 10 where 0 means you were not satisfied at all and 10 means you were very much satisfied.

Satisfaction on political actions undertaken - 2/2

Once again, Romania, Ireland, Belgium and the Netherlands sanction less the political actions from local or UE authorities but remain largely unsatisfied.



Base: 1998 - All

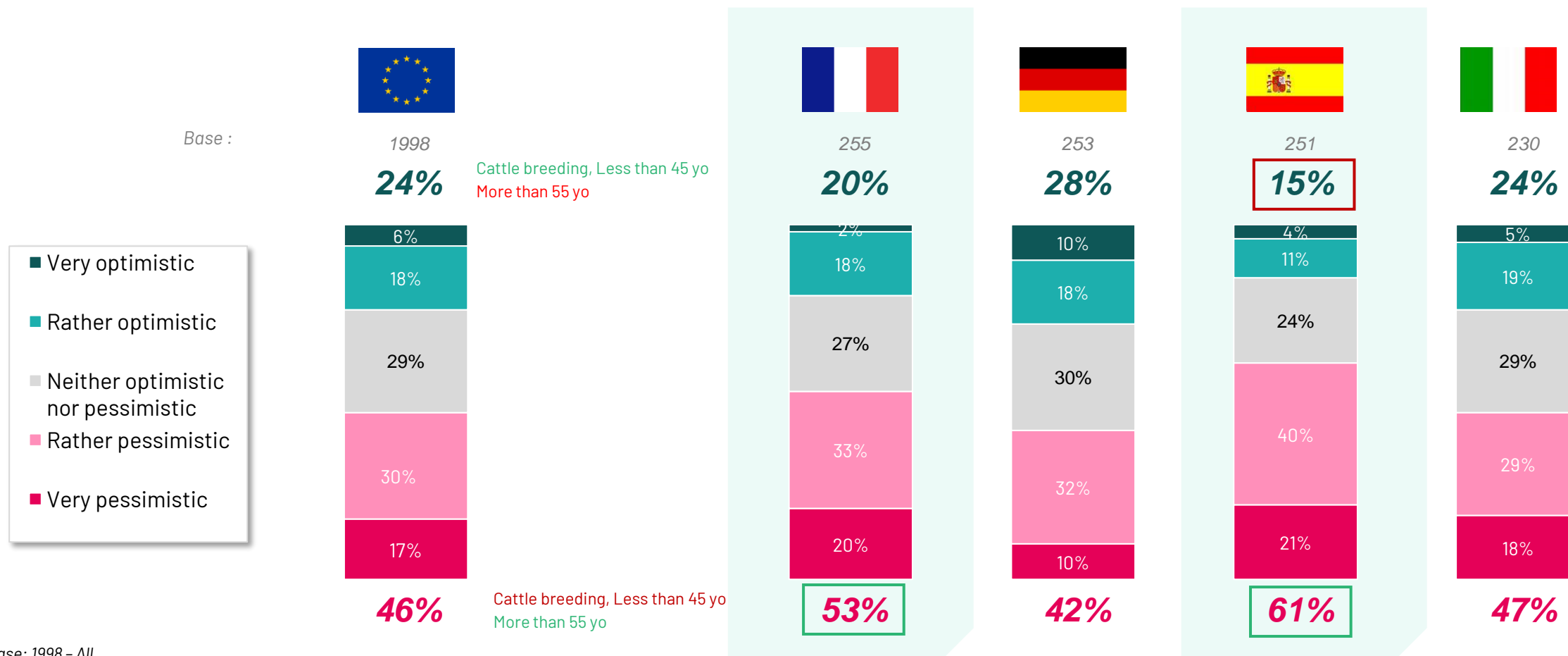
C7: Overall, how satisfied are you about the actions that were undertaken by local or European political authorities? Please enter a grade from 0 to 10 where 0 means you were not satisfied at all and 10 means you were very much satisfied.

European farmers still face a difficult economical situation

- Around half of European farmers are pessimistic about their situation today
- Overall, the economical situation of the farmers in Romania, Ireland, Belgium and the Netherlands seems more positive
- If farmers appreciate their rewarding and challenging profession, they face many economical obstacles, regulatory constraints and administrative workload.

Farmers optimism today - 1/2

A rather pessimist atmosphere for European agriculture today with around half of farmers being pessimists regarding their situation today, especially in the Latin countries where pessimism is higher.

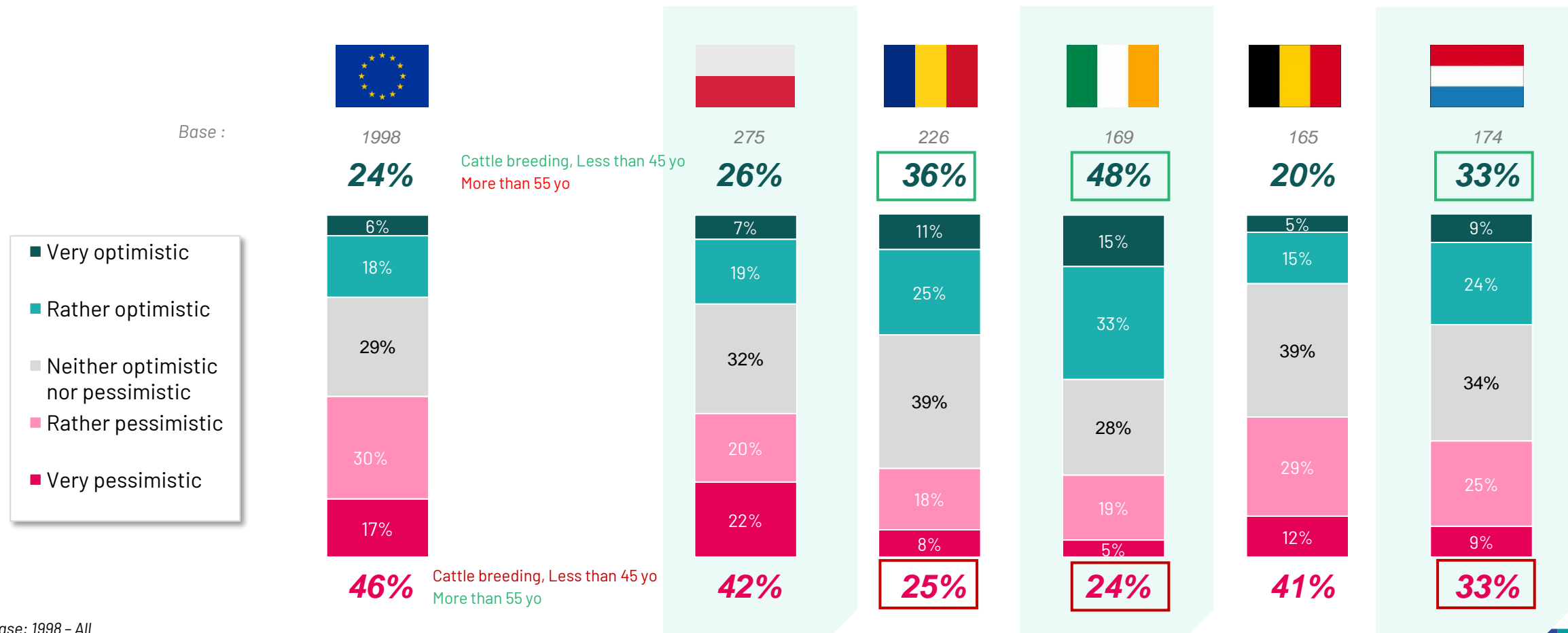


Base: 1998 - All

B1: Considering the current context and the situation of your farm, do you feel...?

Farmers optimism today - 2/2

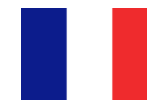
At the opposite, more optimistic farmers can be found in Romania and Ireland.
In Belgium and the Netherlands, farmers have more mixed feelings between optimism and pessimism.



Base: 1998 - All

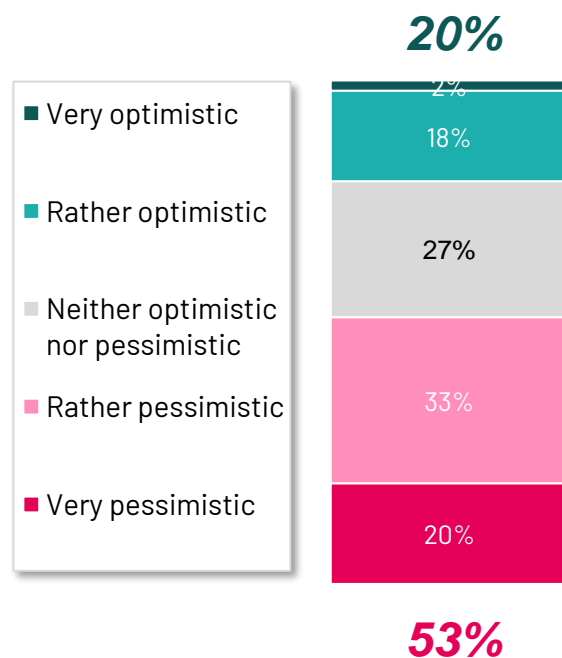
B1: Considering the current context and the situation of your farm, do you feel...?

Focus on the French farmers

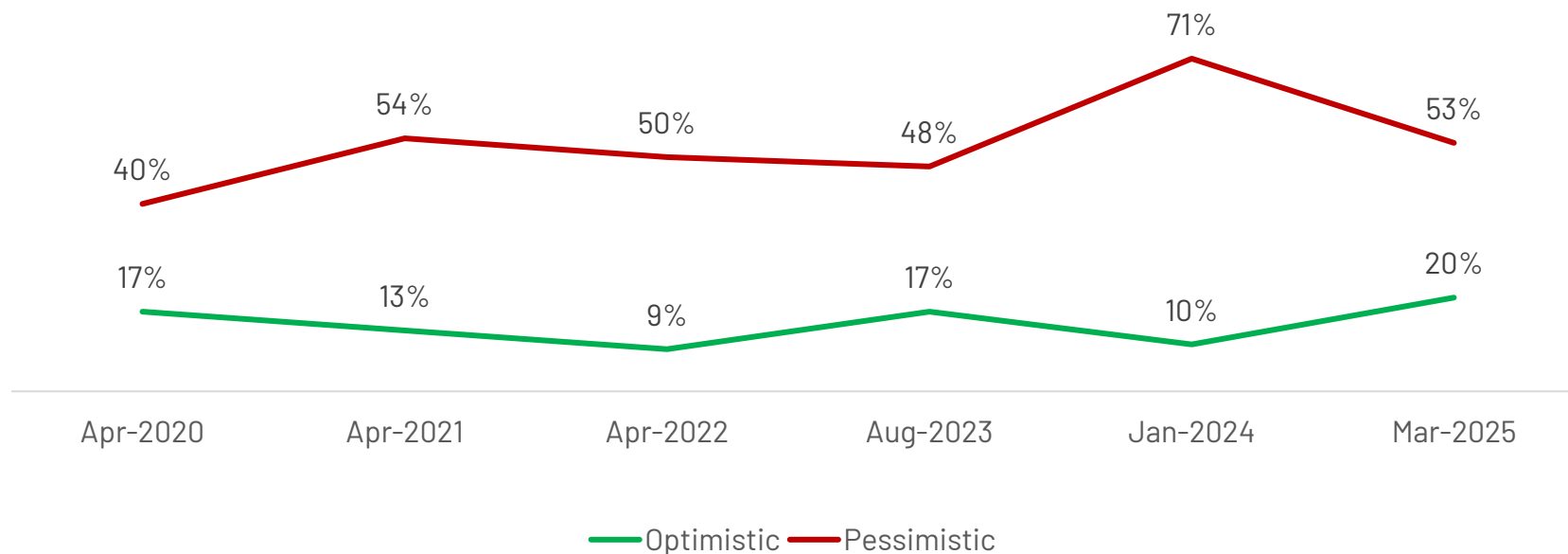


Despite having low levels of optimism, French farmers are retrieving their past levels of pessimism after a paroxysm reached and induced last year by the 2024 farmers' protests.

Reminder French scores



Reminder from our past measures



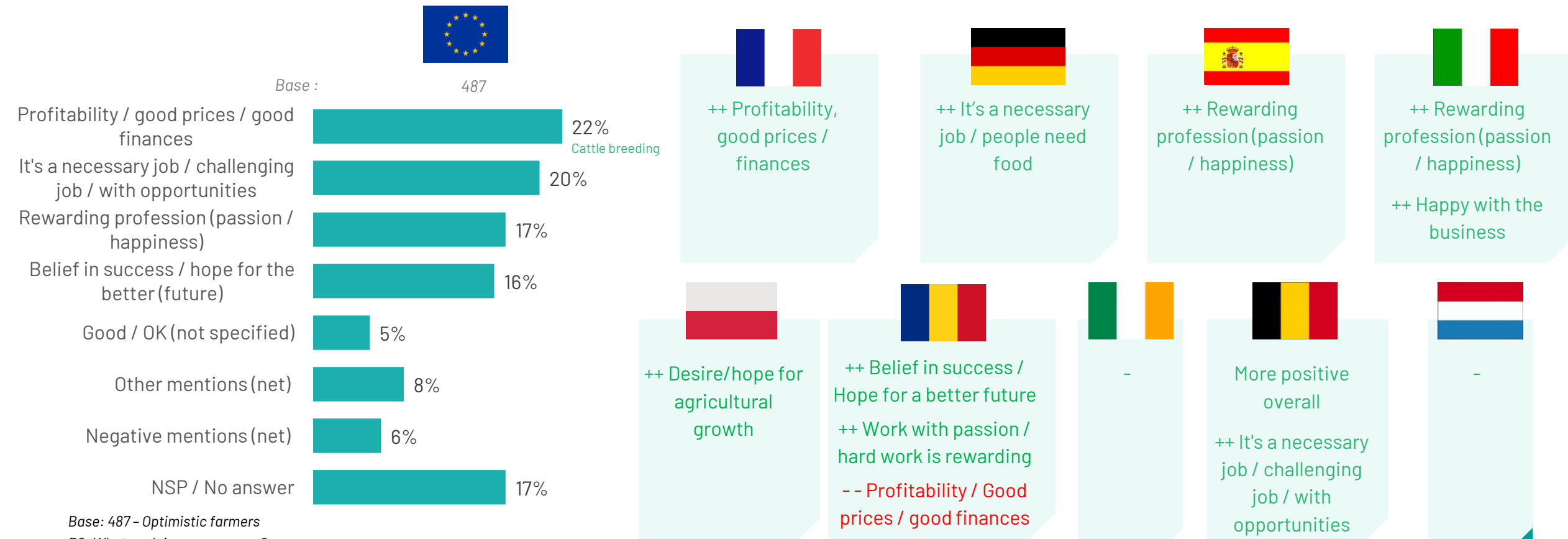
Source of past measures: Ipsos' studies published on [Ipsos.fr](https://www.ipsos.fr)

Base: 255 – French farmers

B1: Considering the current context and the situation of your farm, do you feel...?

Reasons for optimism

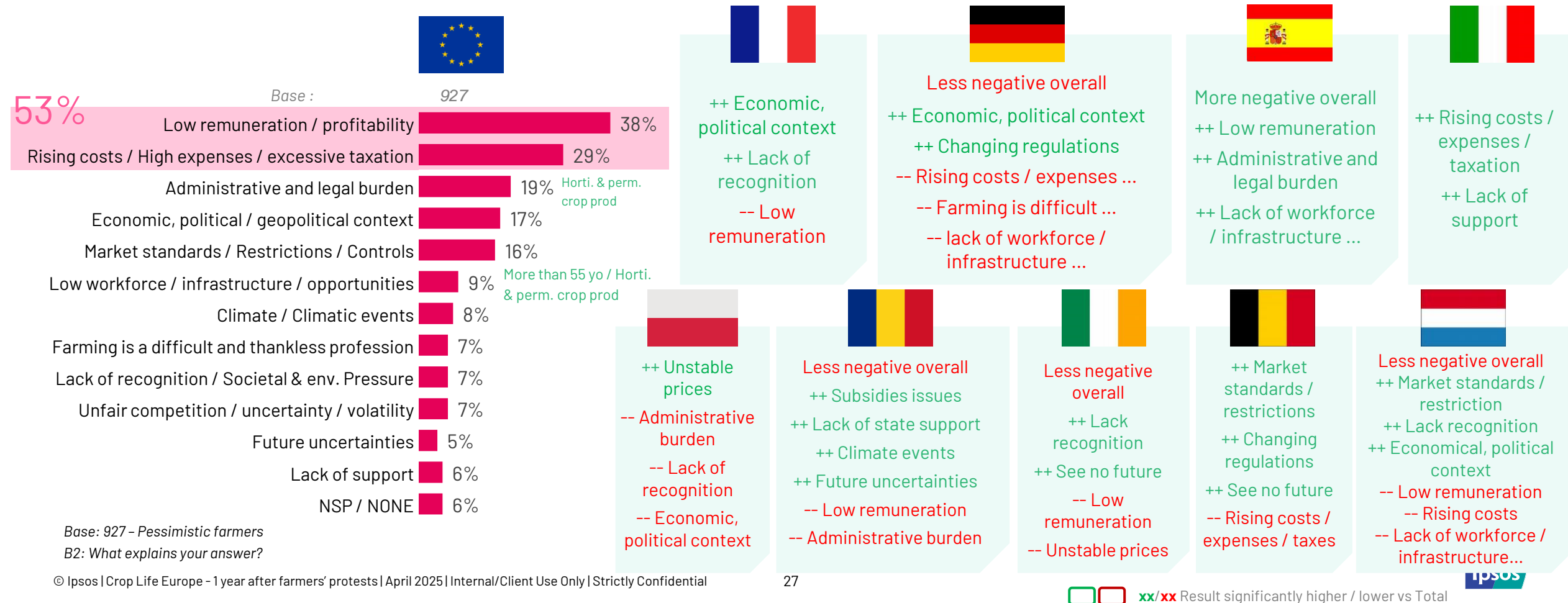
Being successful in its business is the 1st reason to be optimistic for a farmer, especially in France. It's also a job of pride and challenges, particularly appreciated in Spain, Italy, Germany and Belgium. Both in Poland and Romania, farmers hope for a better future in agriculture.



Base: 487 - Optimistic farmers
B2: What explains your answer?

Reasons for pessimism

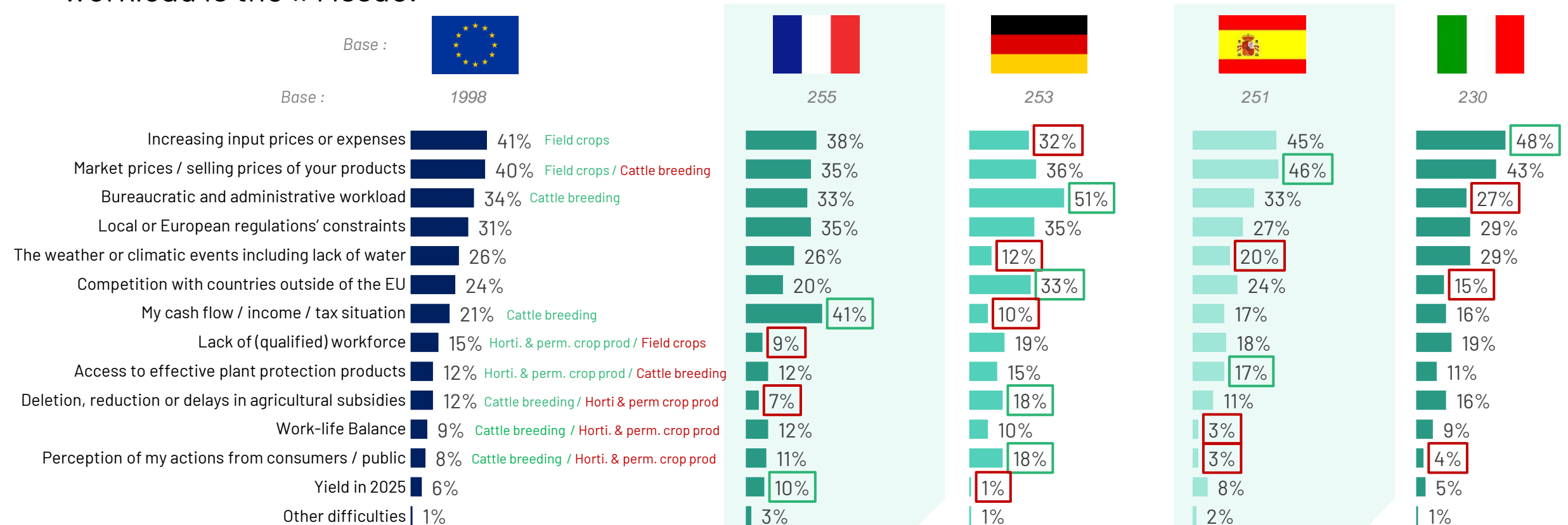
Half of our pessimistic farmers faces financial issues. The countries showing the more optimism are the countries that are facing the less economical difficulties overall, worrying about other topics (RO/IE/NTH). Pessimism from horticultural/permanent crops is explained by impacting market conditions and administrative burden.



Difficulties encountered today – TOP 3 – 1/2

Their pessimism is issued from various sources with a common baseline being the low market prices and high expenses, especially in Italy and Spain.

French farmers are more concerned about the cash flow whereas in Germany the administrative workload is the #1 issue.

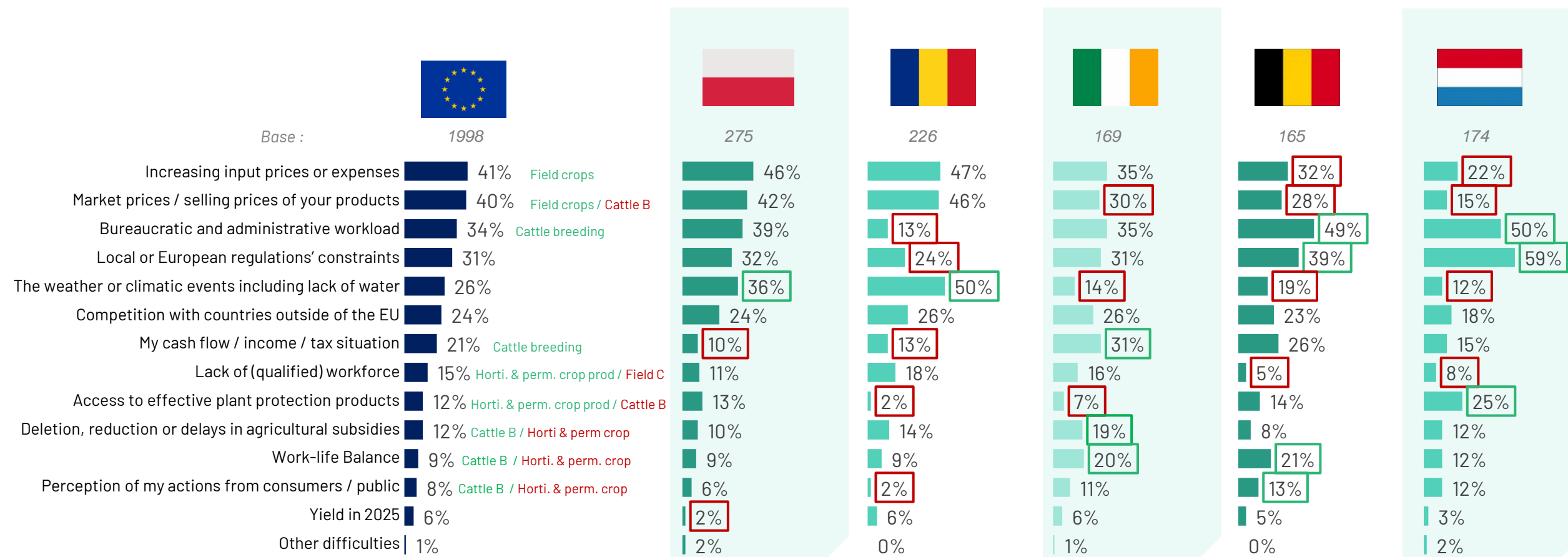


Base: 1998 – All

B3: What are the 3 main concerns or difficulties you are currently encountering on your farm?

Difficulties encountered today – TOP 3 - 2/2

Overall, Irish, Dutch and Belgian farmers seem less impacted by the selling or buying prices but seem more concerned about the administrative workload and the European regulations. Romanians and Polishes are more impacted by climatic event on top of the prices.

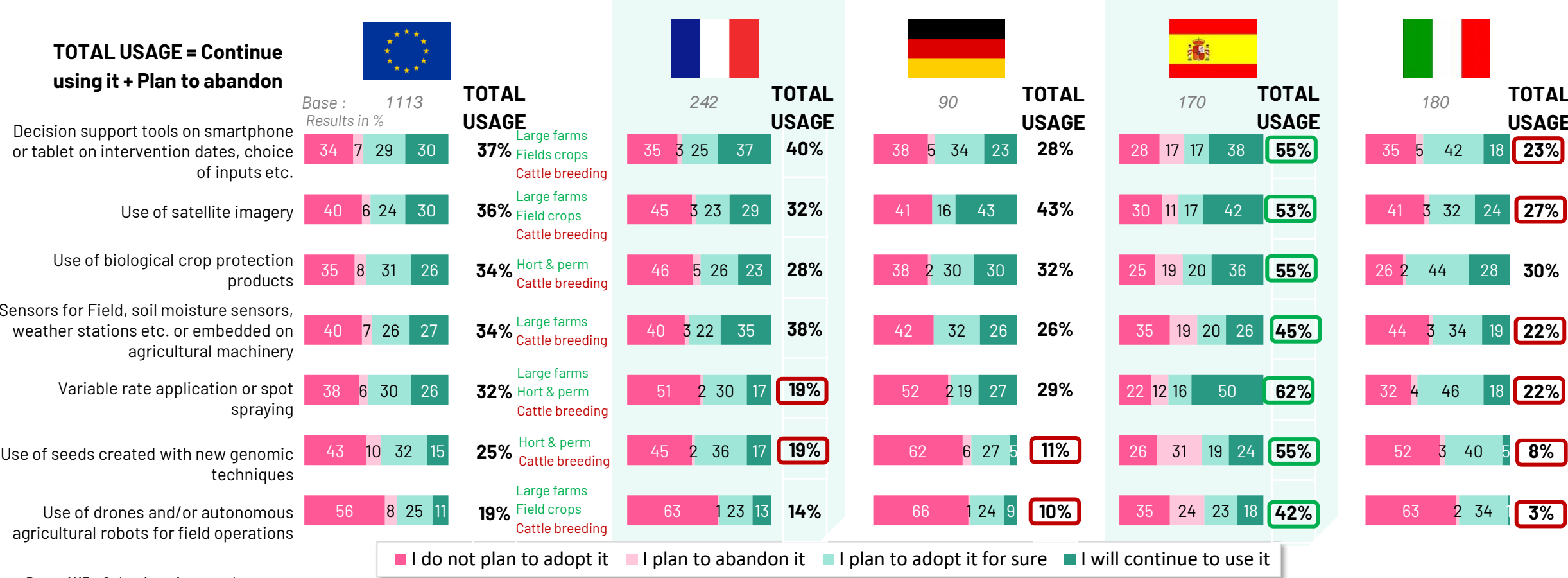


Base: 1998 – All

B3: What are the 3 main concerns or difficulties you are currently encountering on your farm?

New technologies in European agriculture - 1/2

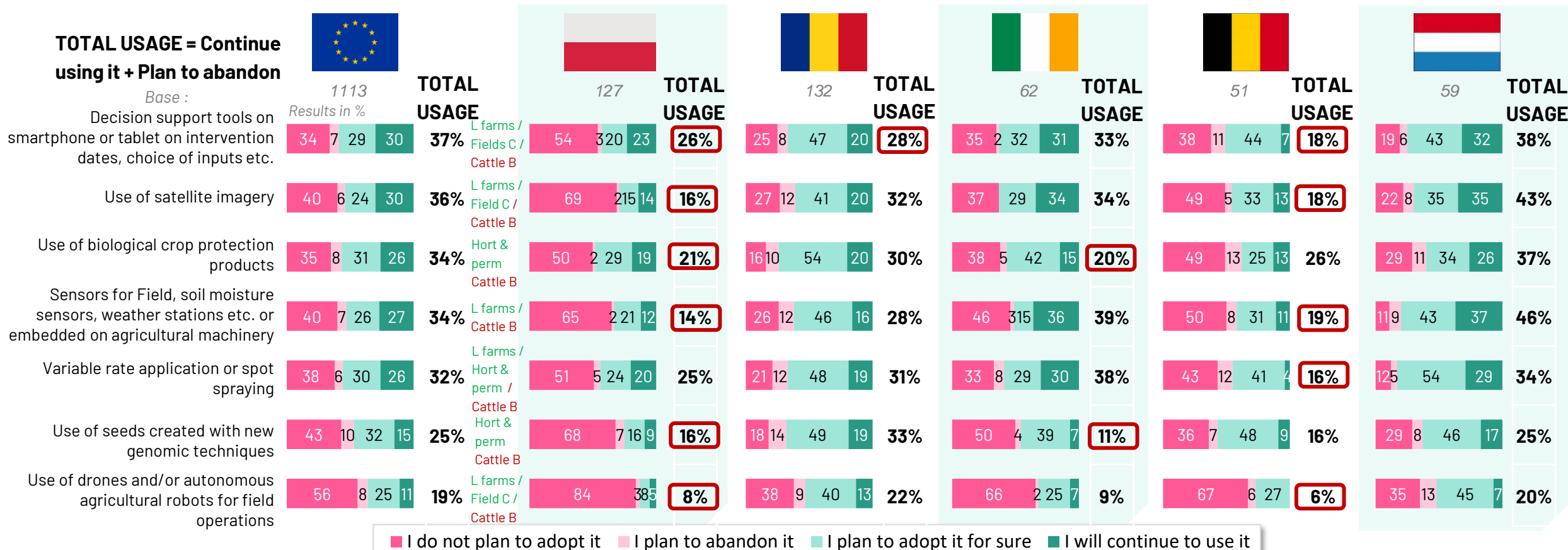
The usage rate of the new agricultural technologies is still quite low and average 20 to 30% of adoption rate. DSTs and satellite imagery are the most adopted practices today whereas use of drones and robots are much more exclusive.



Base: 1113 – Selection of respondents

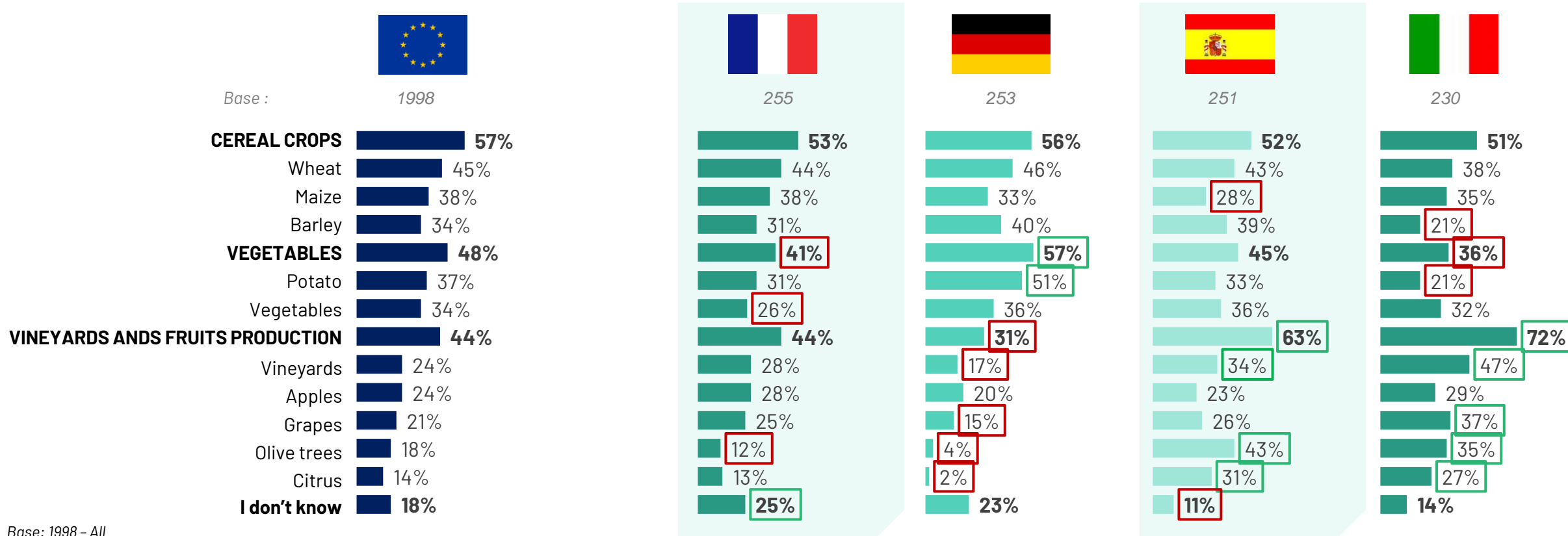
B7: And tell me what you think about the use of the following technologies in the next 3 to 5 years: if you plan to continue using it, you plan to adopt it for sure, abandon it, or not adopt it?

New technologies in European agriculture - 2/2



Productions at risk - 1/2

Farmers tend to select their own productions when assessing about a potential decline in their toolbox. At European level, all productions are therefore equally at risk with countries differences that may be explain with their respective national produce's importance.

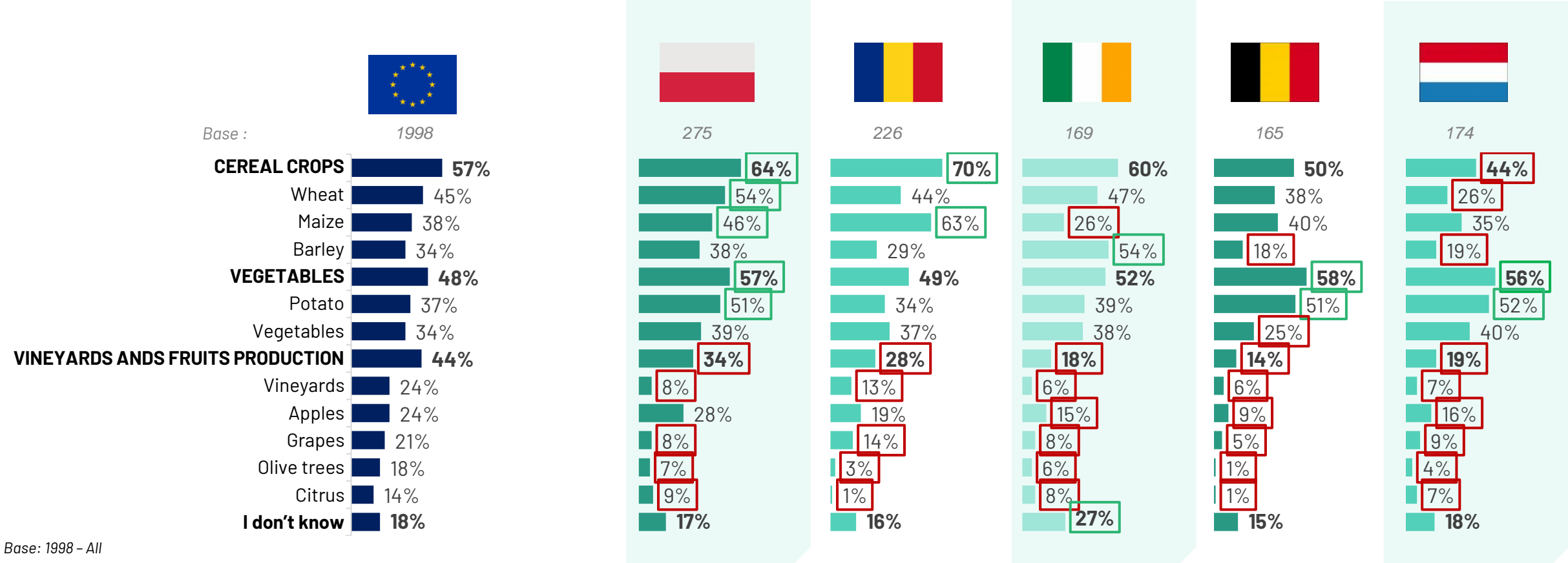


Base: 1998 - All

B5A: Farmers have highlighted the decline in their toolbox for their crop protection. If you were facing a lack of solutions (pesticides and biopesticides) and according to you, what productions in your country could be at risk, reduced or completely stopped in the next years due to the lack of crop protection solutions available?

Productions at risk - 2/2

In those countries where fruit and vineyards productions are less important, they are less perceived at risk.

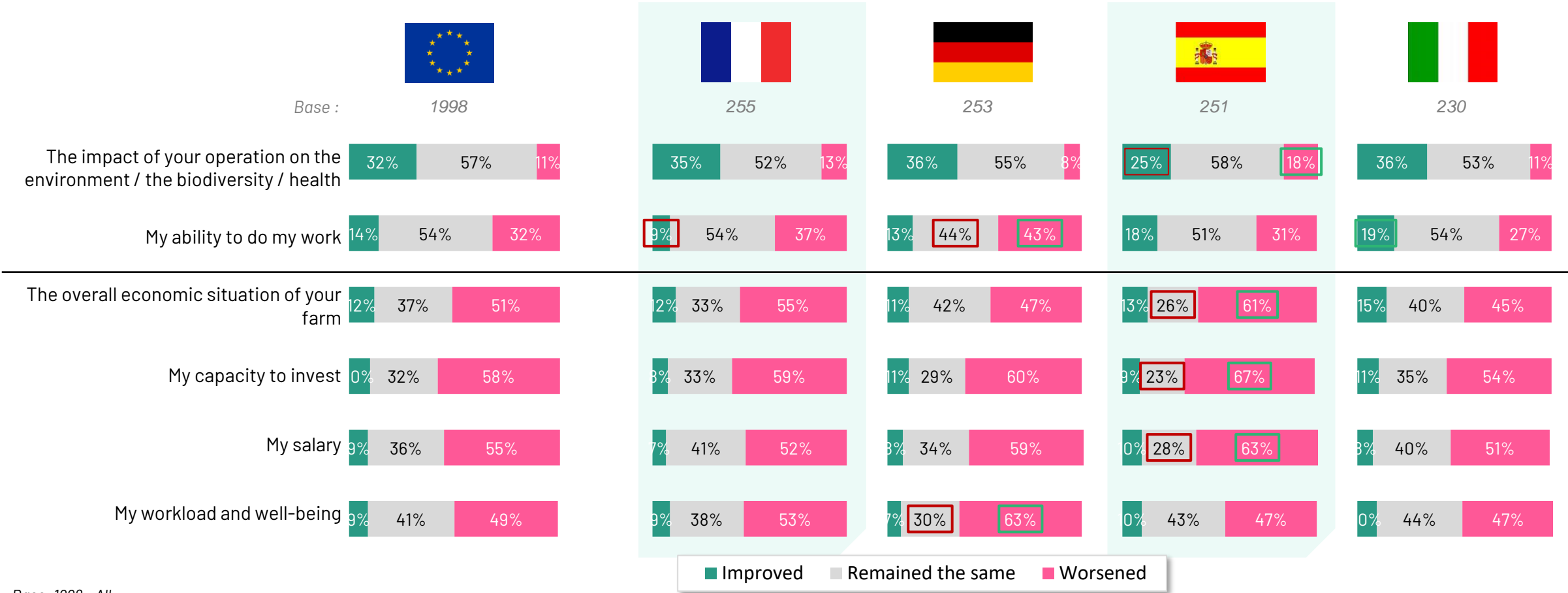


Base: 1998 - All

B5A: Farmers have highlighted the decline in their toolbox for their crop protection. If you were facing a lack of solutions (pesticides and biopesticides) and according to you, what productions in your country could be at risk, reduced or completely stopped in the next years due to the lack of crop protection solutions available?

Perceived changes in their situation since last year - 1/2

A clear split between their economical situation and their practices: European farmers estimate that their environmental impact and their ability to work have either remained the same or progressed since last year whereas their economical situation or well-being clearly worsened in their opinion.

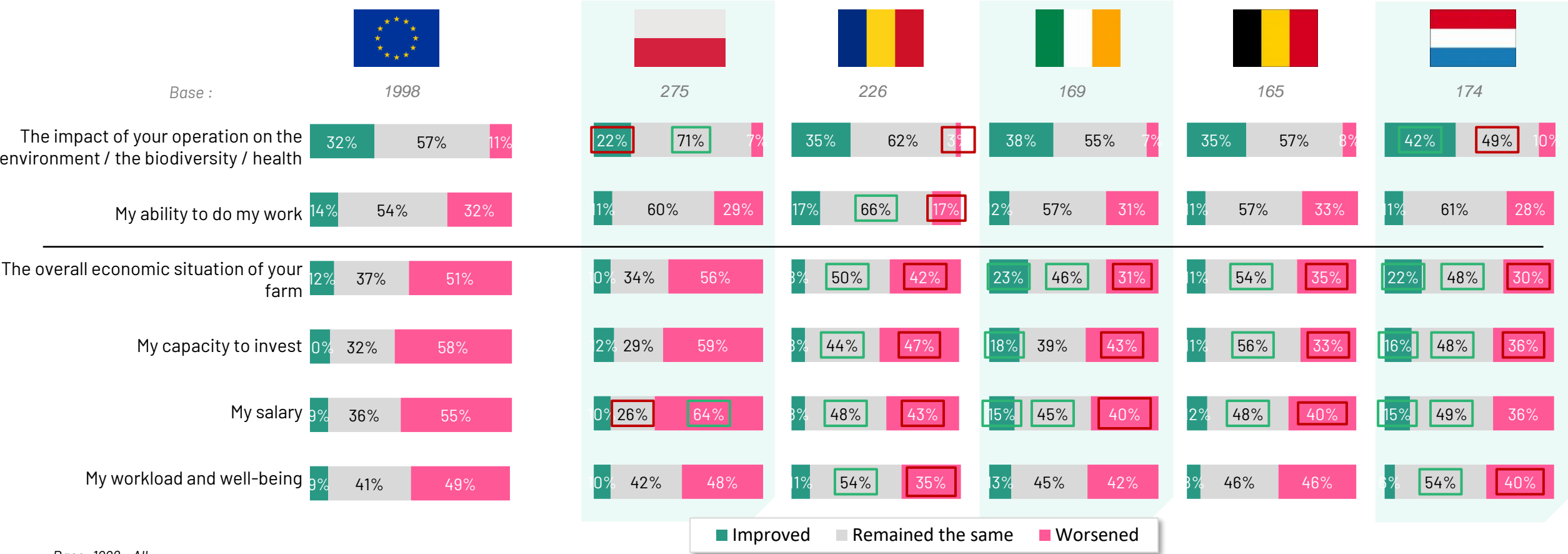


Base: 1998 - All

B5: Regarding the below propositions relating to your operation, would you say that your situation has improved, remained the same or worsened since last year at the same period?

Perceived changes in their situation since last year - 2/2

A clear split between Romania, Ireland, Belgium and the Netherlands that better perceive their economical situation since last year, compared to the other countries.

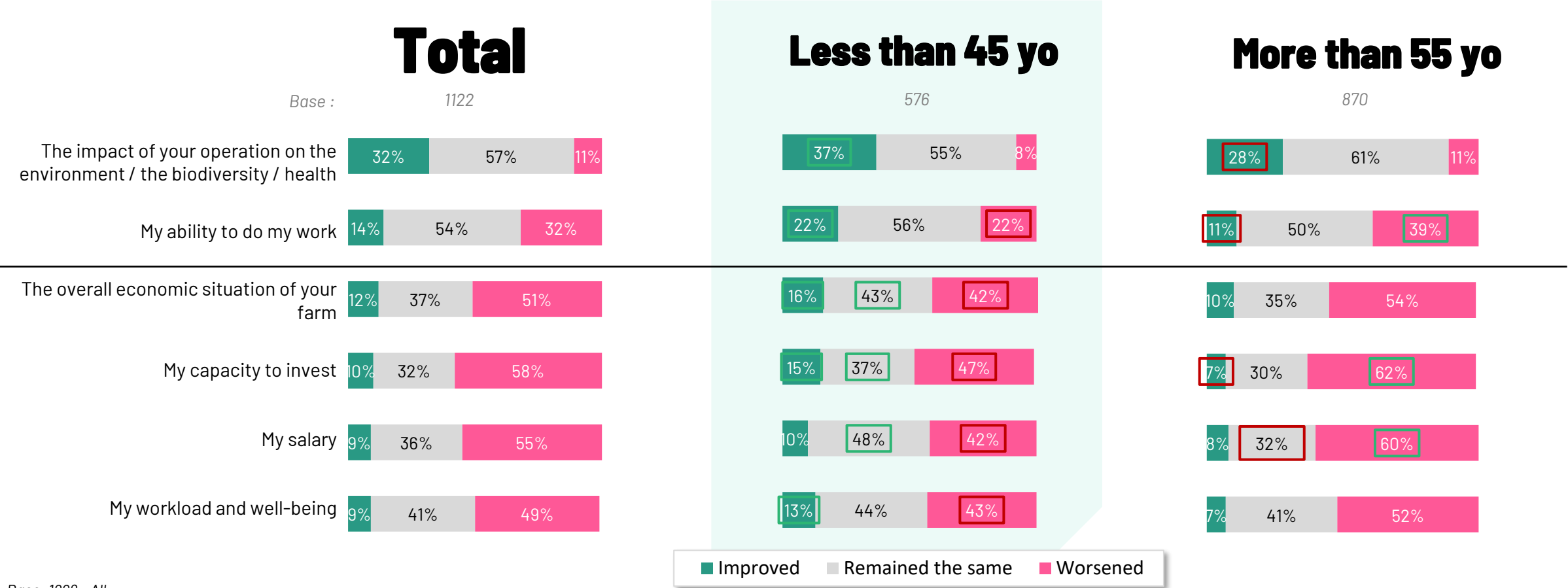


Base: 1998 - All

B5: Regarding the below propositions relating to your operation, would you say that your situation has improved, remained the same or worsened since last year at the same period?

Perceived changes in their situation since last year – Age

Young farmers are more positive and hopeful with more of them noting improvements in their situation. Despite their positivity, a majority considered a same or worsened situation. For the older farmers, the negativity is higher, especially on their ability to work, to invest or to have decent salary.



Base: 1998 – All

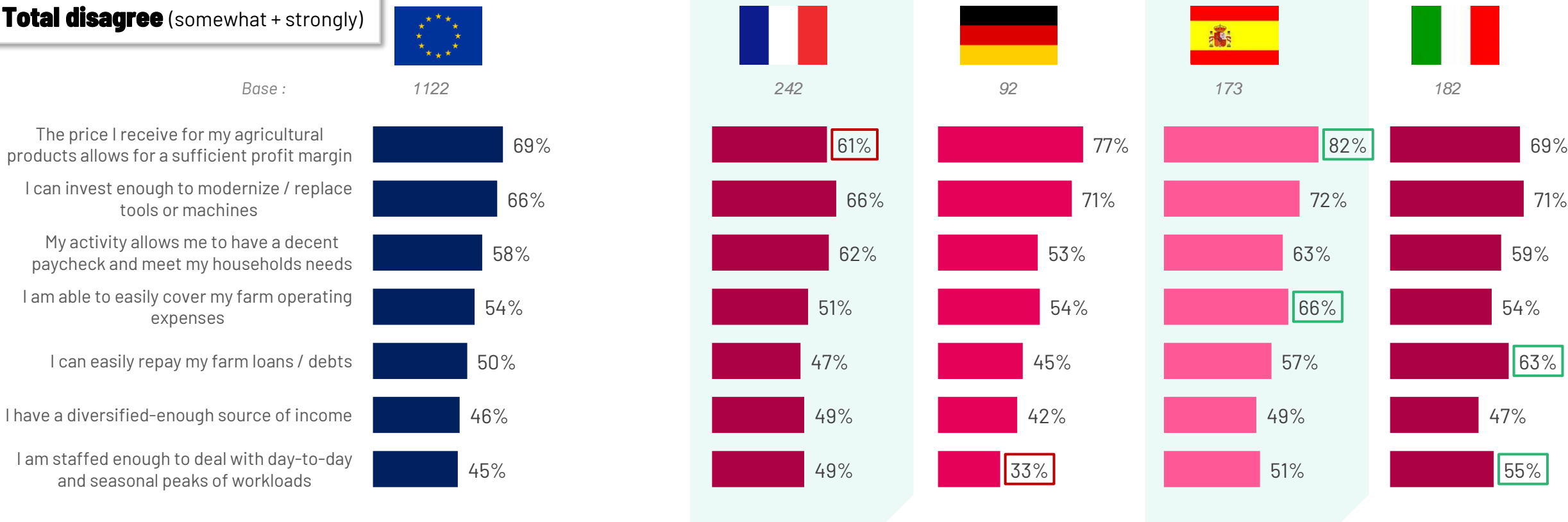
B5: Regarding the below propositions relating to your operation, would you say that your situation has improved, remained the same or worsened since last year at the same period?

General perception about their financial situation - 1/2

2/3rd of European farmers do not consider having enough money to invest in new tools or machines nor to sell their productions at the correct prices.

Generally speaking, they encounter a lot of financial difficulties, whatever the country considered.

Total disagree (somewhat + strongly)



Base: 1122 – Selection of respondents
B4: Please indicate to what extent you agree with the following sentences describing your financial situation?

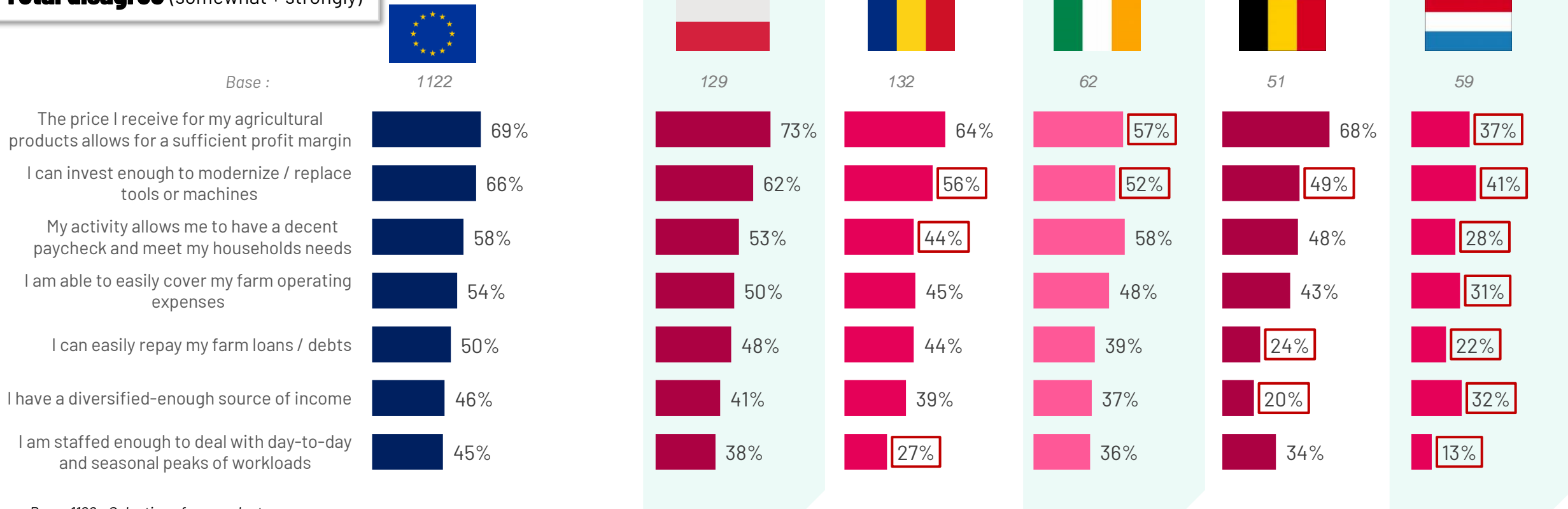
Note: Results shown on a selection of farmers, not as representative as the full sample.



General perception about their financial situation - 2/2

Romania, Ireland, Belgium and the Netherlands are the 4 countries where farmers are a bit more optimistic regarding their financial situation, especially on their ability to repay the loans, to diversify their income or to be staffed enough.

Total disagree (somewhat + strongly)



Base: 1122 - Selection of respondents

B4: Please indicate to what extent you agree with the following sentences describing your financial situation?

Note: Results shown on a selection of farmers, not as representative as the full sample.

General perception about their financial situation



Large farms and young farmers are globally less impacted by financial issues.

Young farmers however still face difficulties finding a workforce to help them with peaks of workload.

Total disagree (somewhat + strongly)

Total

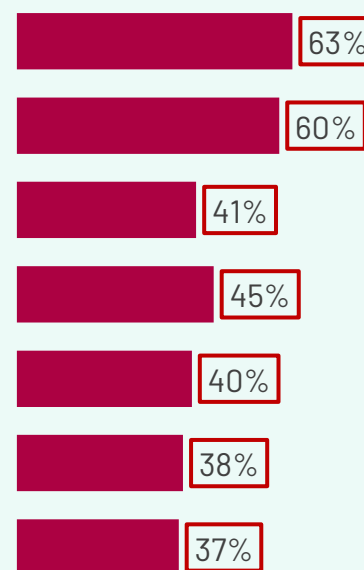
Base :

1122



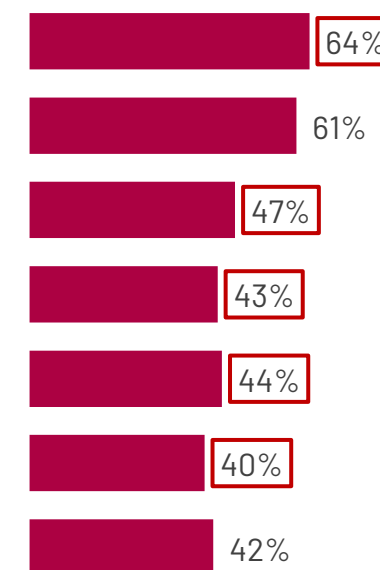
Large farms

607



Less than 45 yo

576



Base: 1122 – Selection of respondents

B4: Please indicate to what extent you agree with the following sentences describing your financial situation?

Note: Results shown on a selection of farmers, not as representative as the full sample.

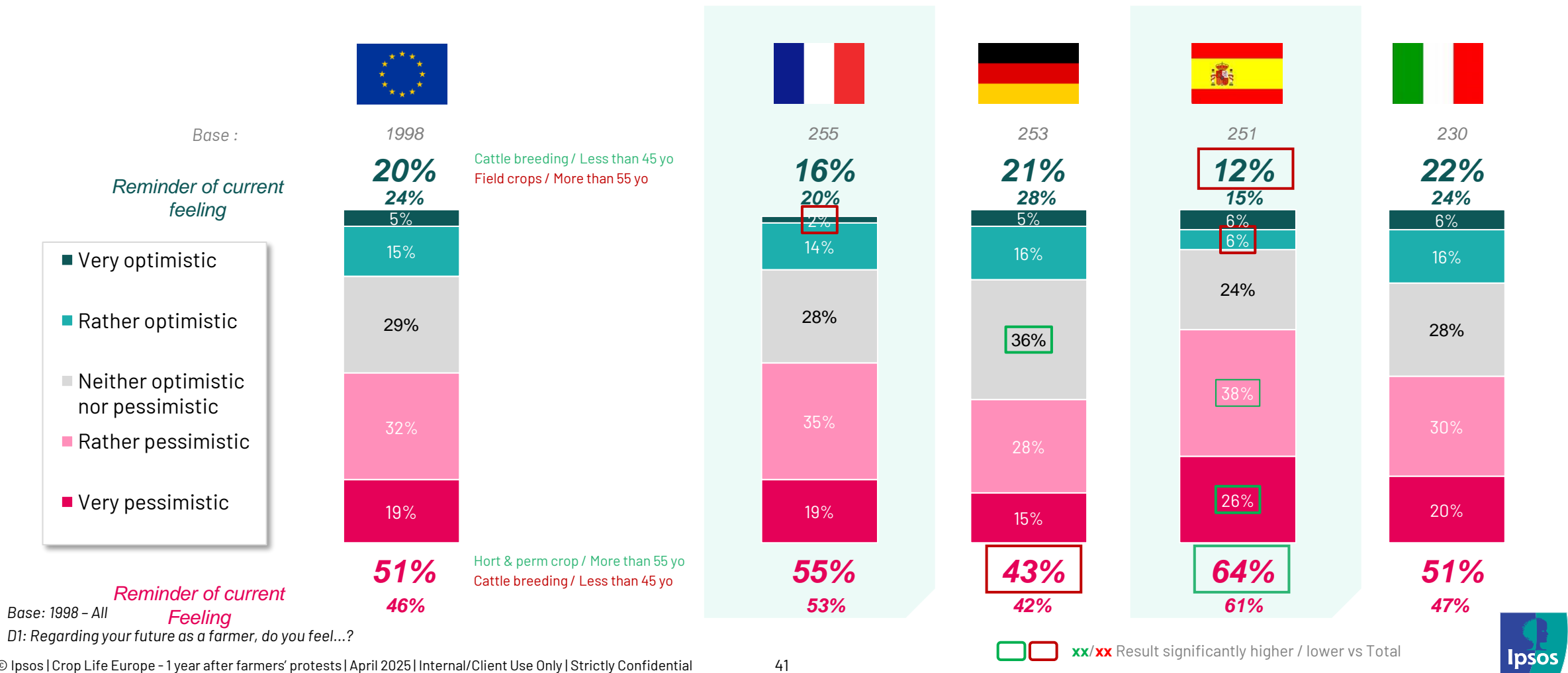
 xx/xx Result significantly higher / lower vs Total

The need for financial support and processes' simplification

- Without surprises, 51% of farmers are pessimists for their future in farming
- 35% of the 55 y.o. or more planned to quit farming in the next 5 years
- Among the solutions identified: simplification of procedures, economical support and maintaining access to CP toolbox
- Half of Farmers plan to go protesting again

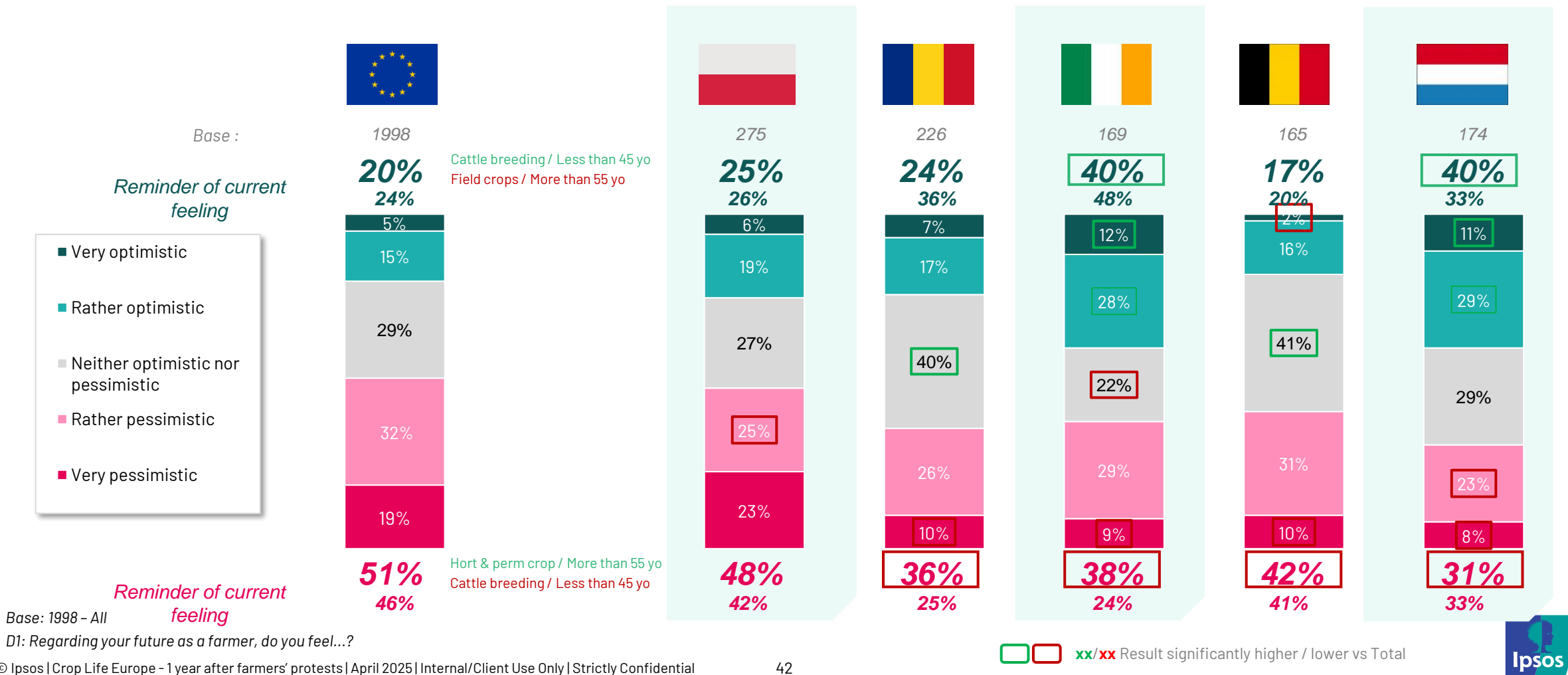
Farmers' optimism for their future - 1/2

A tendency for farmers to be even more pessimist for their future as a farmer. The level of pessimism deepens from 46% to 51%.



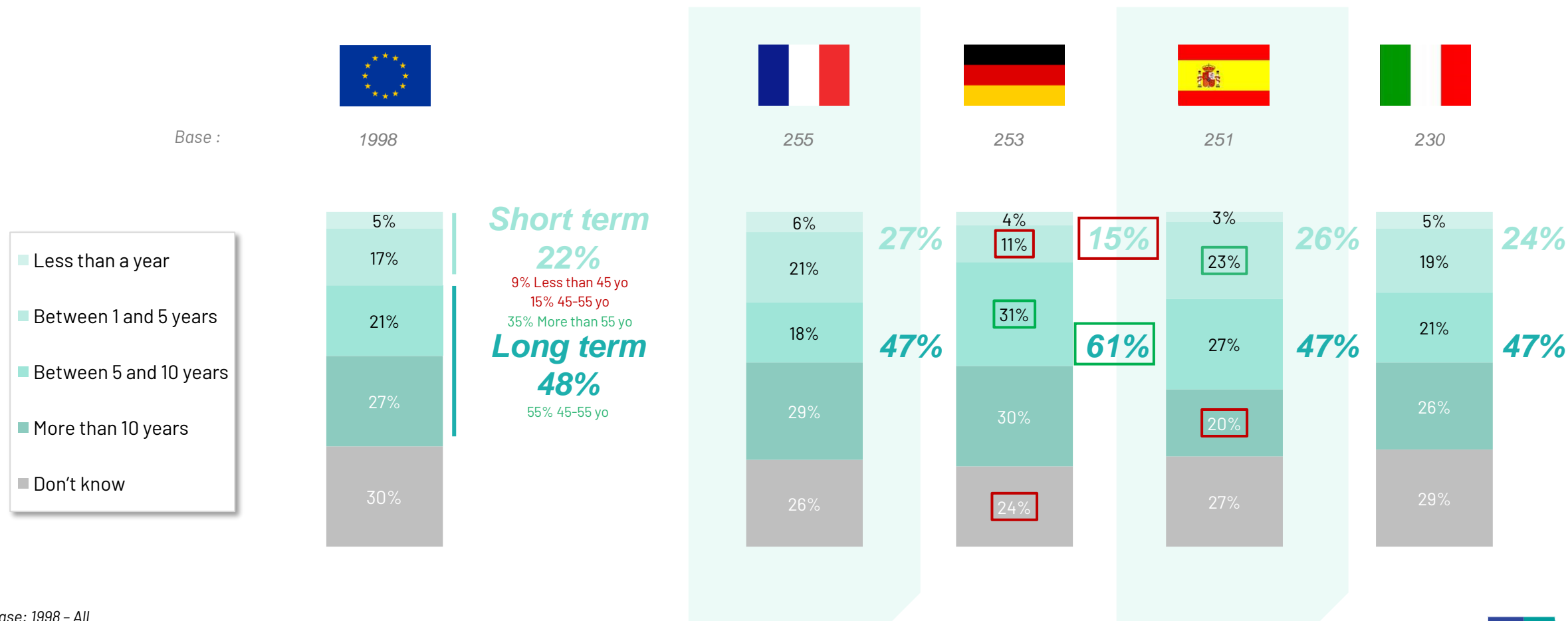
Farmers' optimism for their future - 2/2

Even in the most positive countries, the tendency is to worry for the next farming years, especially in Romania and Ireland. Only the Dutch farmers tend to be more optimist for their future as farmers.



How long do they plan to stay in activity? - 1/2

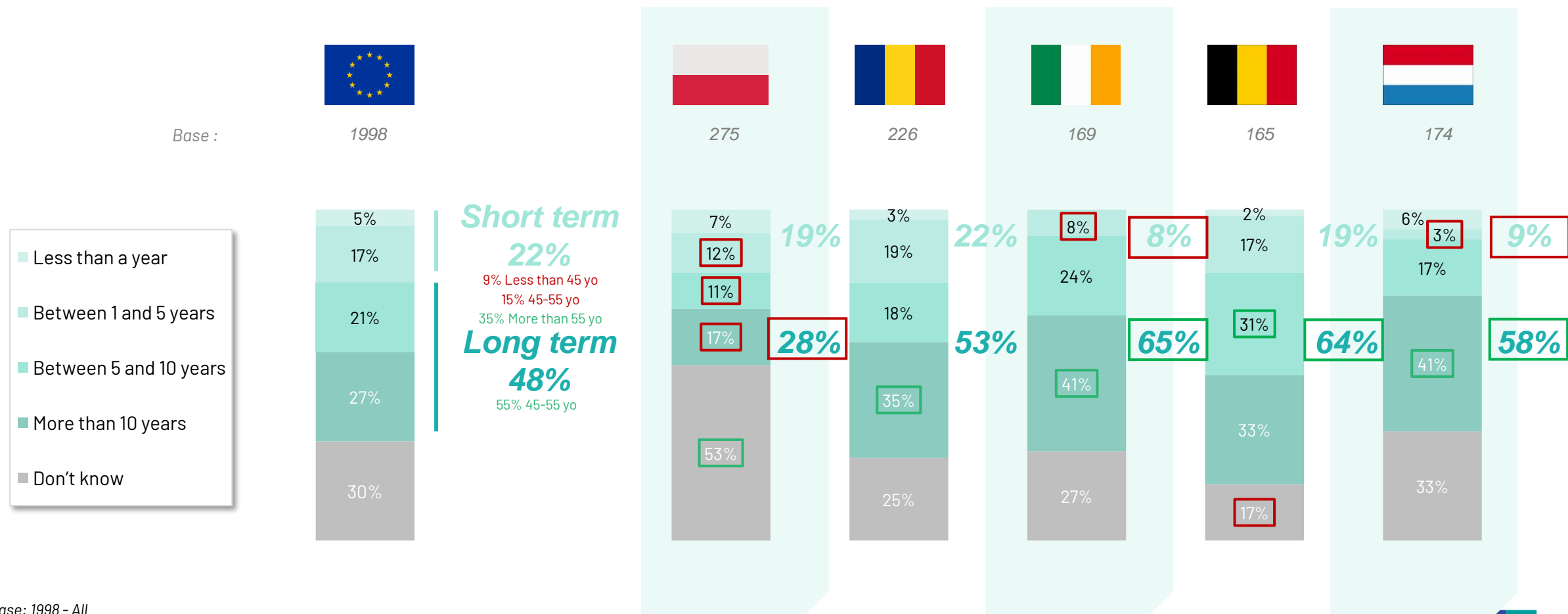
1 farmer out of 5 want to stop their farming activity in the next 5 years and 5% want to stop in less than a year. In France, Spain and Italy, farmers are more incline to leave in the next 5 years.



Base: 1998 - All
D2: When do you plan to stop your farming activity?

How long do they plan to stay in activity? - 2/2

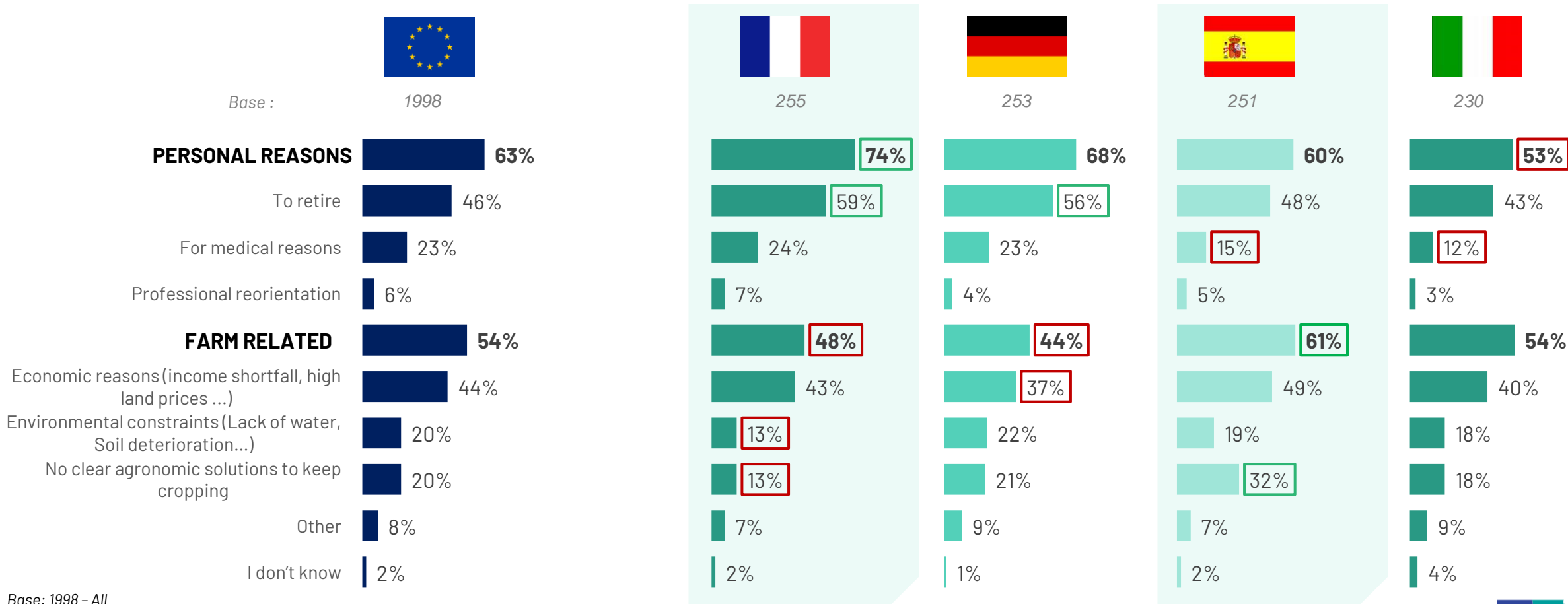
Irish and Dutch farmers are clearly less inclined to leave soon with less than 10% of farmers planning to leave in the next 5 years and none during the year for Irish farmers.



Base: 1998 - All
D2: When do you plan to stop your farming activity?

Abandon reasons - 1/2

Farmers mainly want to quit farming for either retirement or economical reasons. Reasons differ per country: retirement is what motivate more the French and German farmers and Spanish farmers deplore the lack of solutions to keep growing crops.

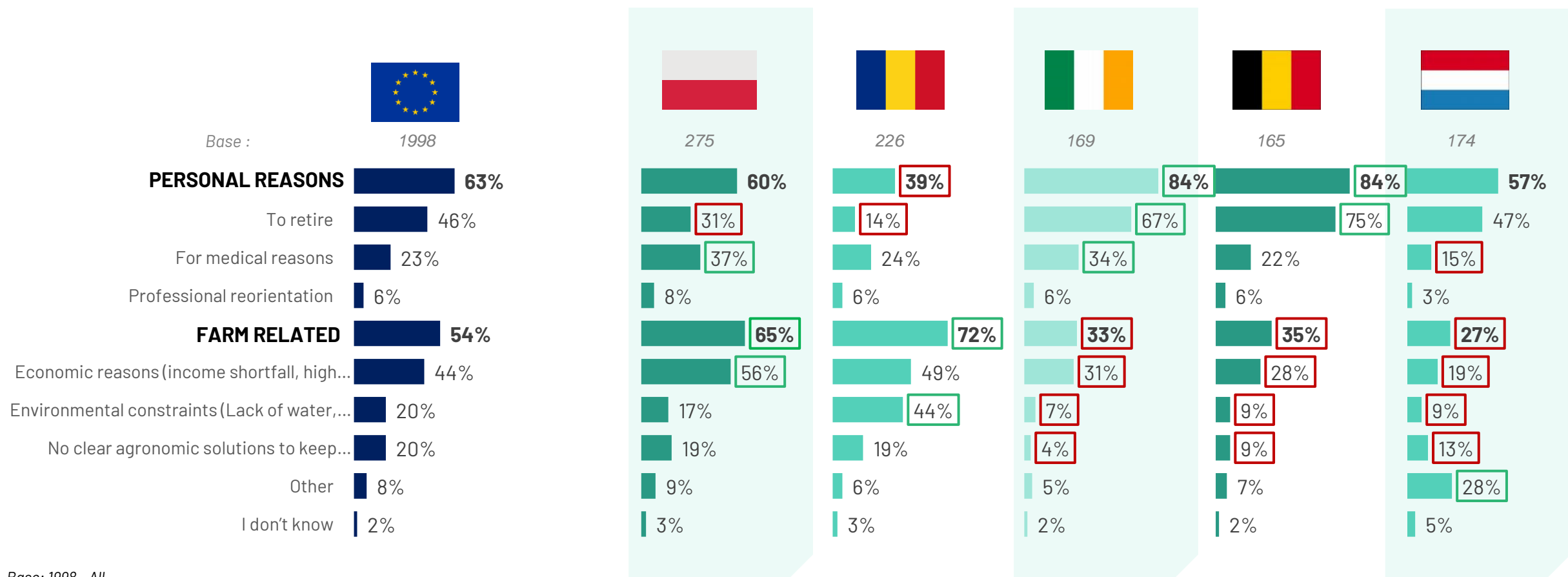


Base: 1998 - All

D2bis: What are the reasons that would lead you to stop your activity?

Abandon reasons - 2/2

As in France and Germany, Irish, Belgian and Dutch farmers mainly plan to quit farming to retire whereas in Poland and Romania, the economical reasons are great impacting them along with the environmental constraints in Romania.

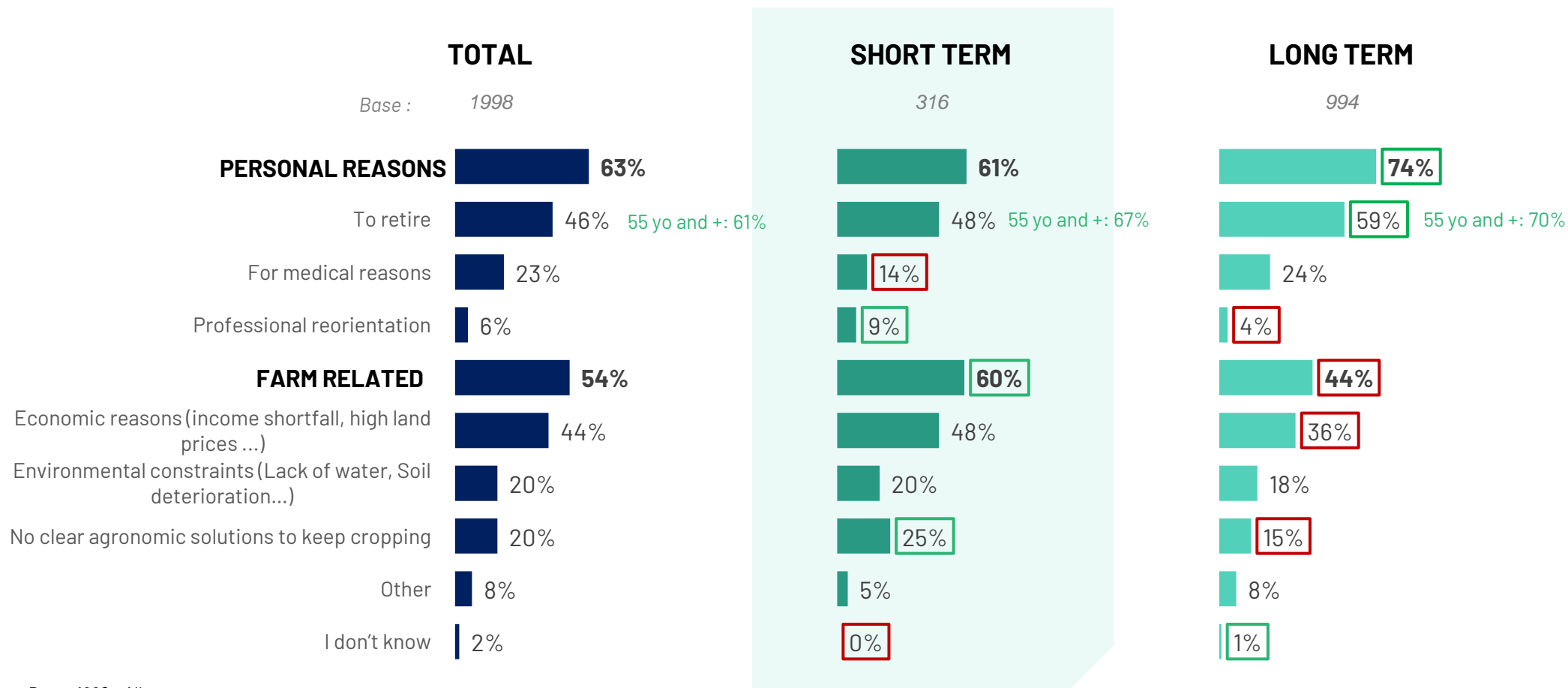


Base: 1998 - All
D2bis: What are the reasons that would lead you to stop your activity?

Abandon reasons Short term vs Long term



Short-term abandon reasons are more farm-related while long-term are personal-related particularly retirement. For farmers over 55 y.o., the first abandon reason is retirement.

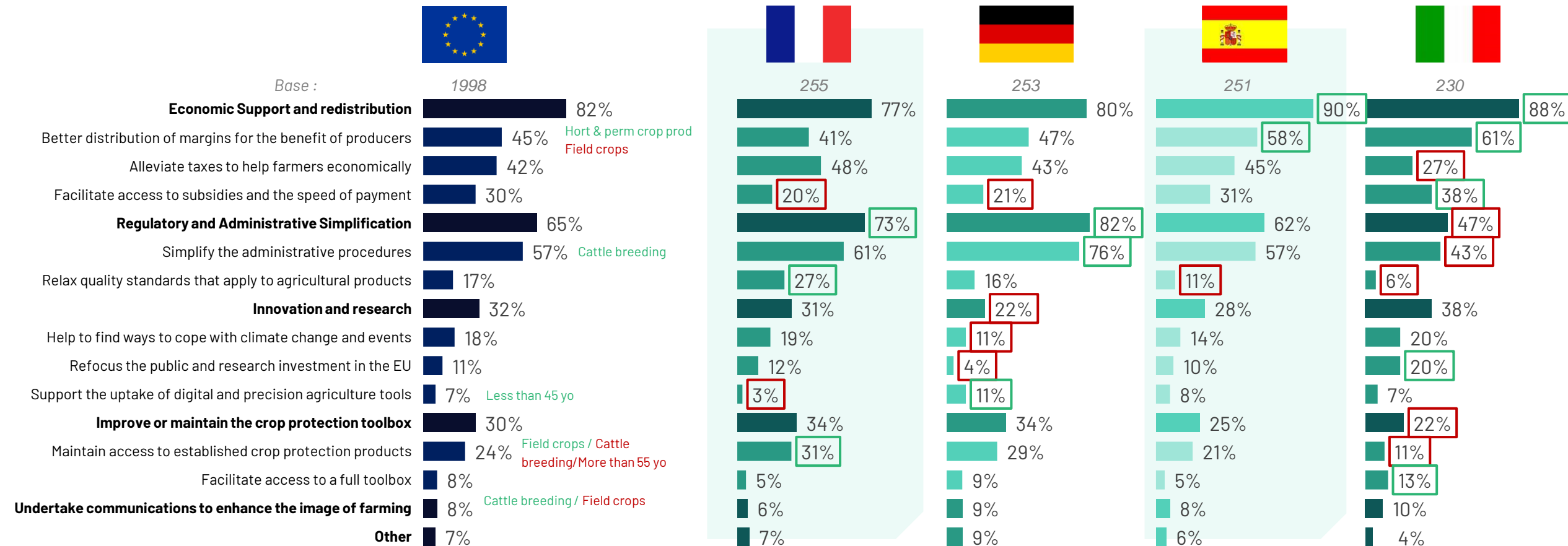


Base: 1998 - All

D2bis: What are the reasons that would lead you to stop your activity?

Top priorities of EU actions - TOP 3 - 1/2

The number 1 priority for farmers is simplifying the administrative overload, a priority shared in all European countries. Economic support is also greatly expected whether through better margin redistribution in the value chain or through lighter taxes.

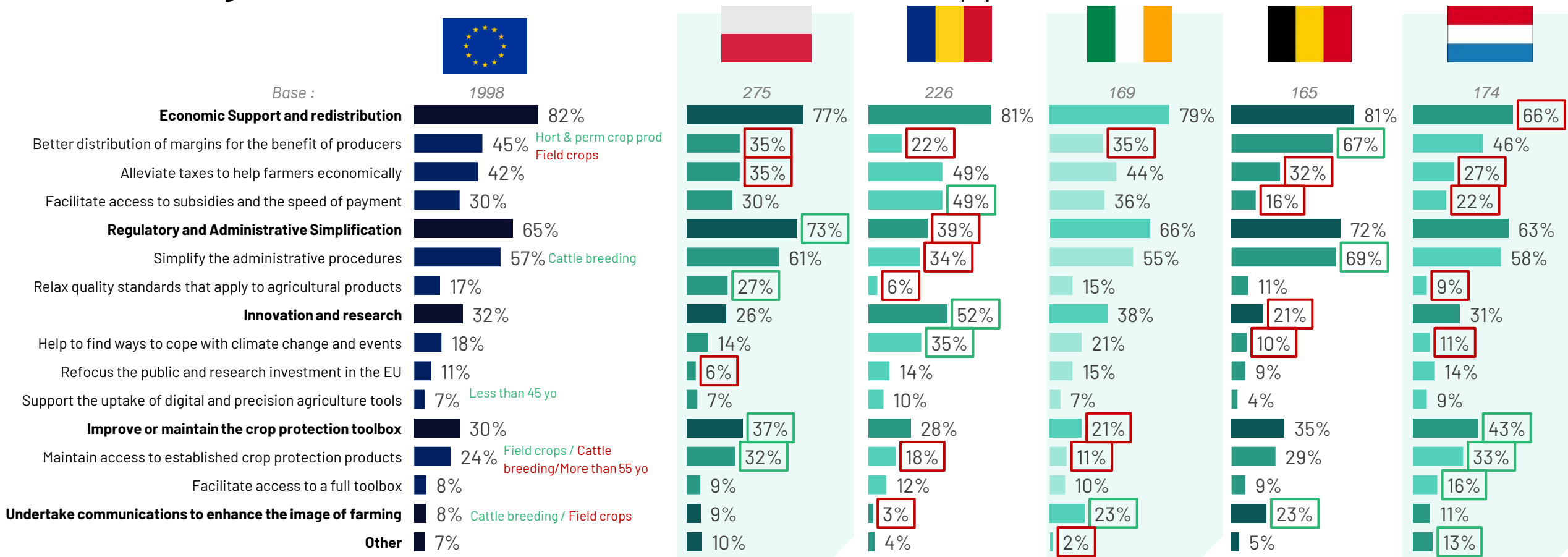


Base: 1998 - All

D4: Among all the actions that the European Union should implement for farmers, what do you think are the 3 most important?

Top priorities of EU actions - TOP 3 - 2/2

Even in the most optimistic countries, economical and regulatory support is expected. Romanian farmers expect facilitated and faster support payments while a third of farmers in France, Germany, Poland, Belgium and the Netherlands need to maintain their crop protection toolbox.

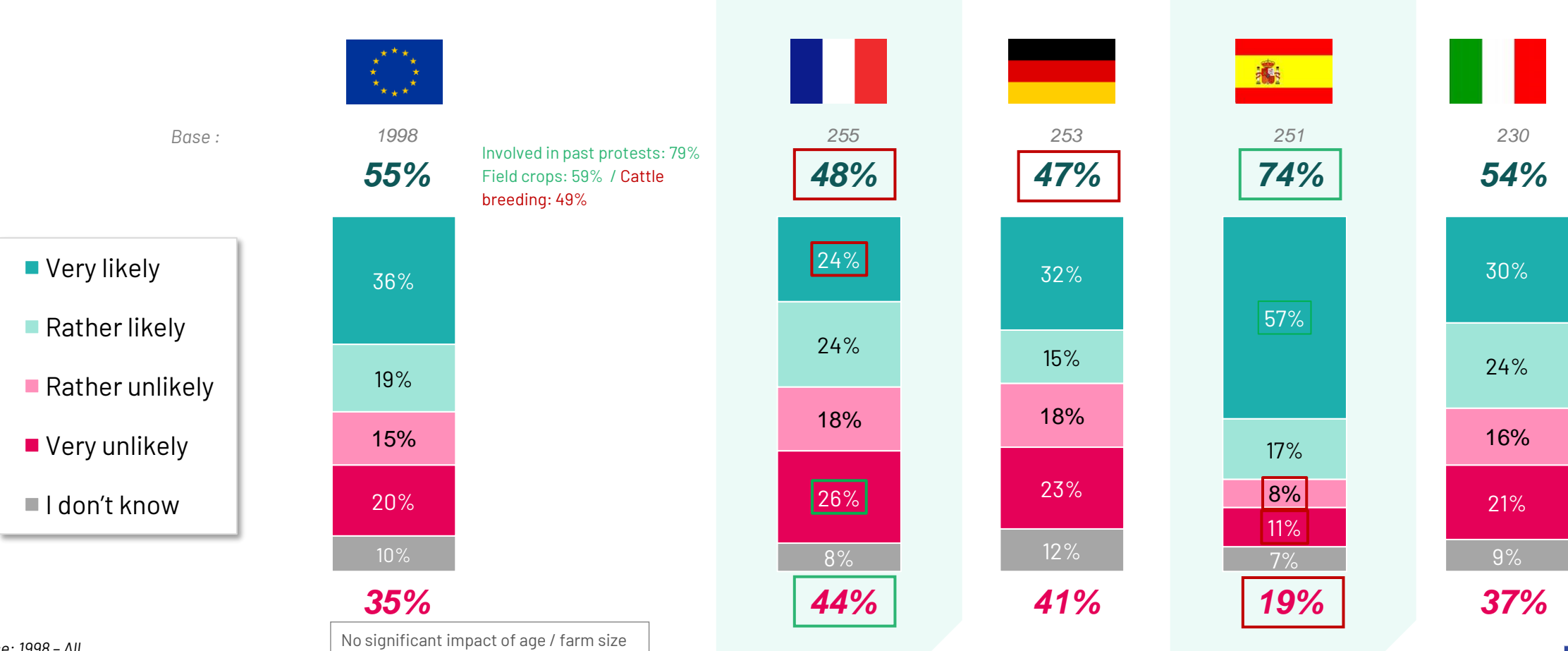


Base: 1998 - All

D4: Among all the actions that the European Union should implement for farmers, what do you think are the 3 most important?

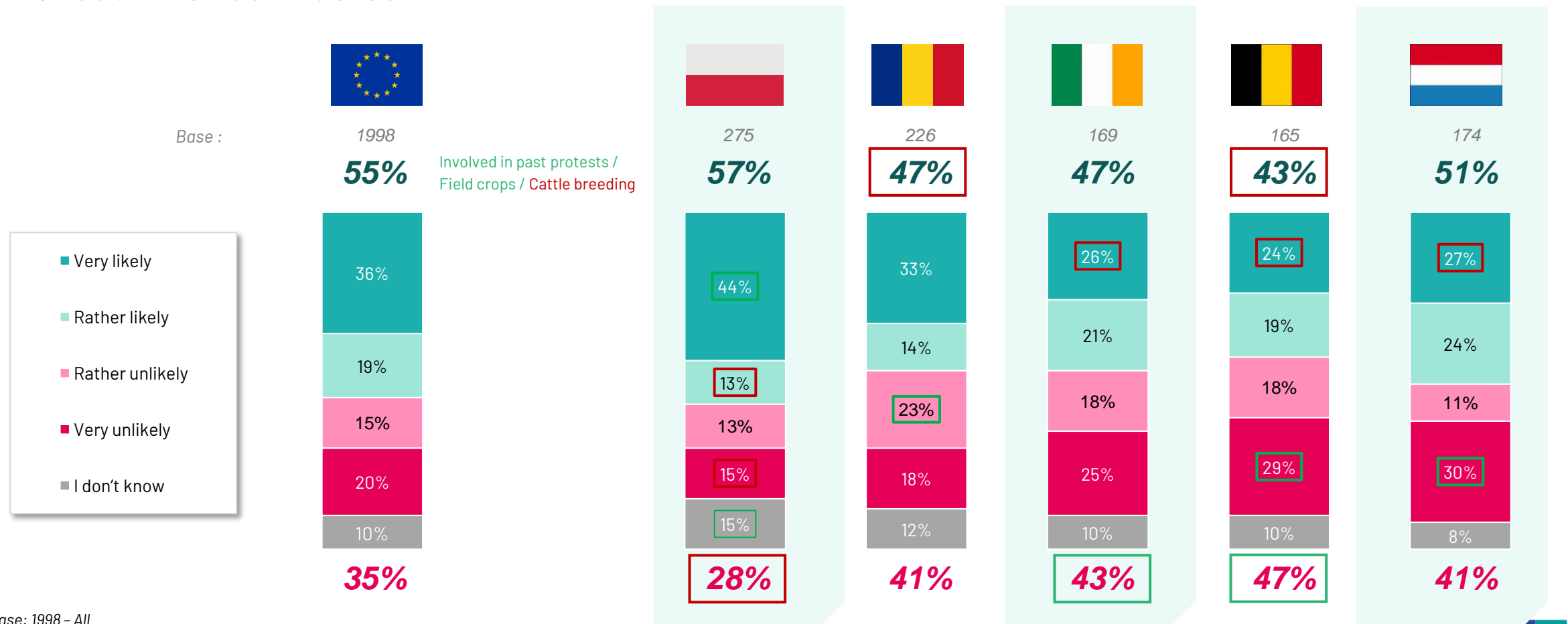
Intention to protest again - 1/2

Farmers are quite willing to protest again with one third being very likely to do so, especially in Spain where discontent is higher. In France and Germany, the farmers are much more divided between likelihood and unlikelihood.



Intention to protest again - 2/2

As in Spain, Polish farmers have quite a high intention to protest again, at the opposite of Romanian, Irish, Belgian and Dutch farmers that are less likely to protest, being overall more positive than in the other countries considered.



Base: 1998 - All

D3: How likely are you to protest again in 2025 if the professional organizations and syndicates call for it?

CONCLUSIONS

Key figures – 1 year after the farmers' protests

1 out of 2 farmers were **involved** in 2024's protests

55% of farmers are **ready to protest again** in 2025

51% of farmers are **pessimistic** about the future of their operation

40% perceived a positive impact on their profession perception but **only 10 to 20% on concrete actions** or engagement from authorities

2 out of 3 farmers perceived a worsened economical situation and administrative workload since last protests

Increasing input prices and **insufficient selling prices** are the top difficulties encountered by farmers today.

22% of farmers plan to stop farming in the next 5 years, **35% of the 55+ y.o. farmers**

82% of farmers expect economical support from the EU and **57% simplify administrative procedures**

91% are unsatisfied about the actions undertaken by local or European political authorities

1 year after the protests: the EU agriculture still in turmoil

1 Despite high involvement, farmers' situation did not improve

- **Half of farmers were being involved** in the protests of 2024, even though **involvement length was more limited** in time. It concerned all farmers, whatever their age or region.
- Apart from limited impact on the perception of their profession, **farmers worry for their similar or worse economical situation** since 2024
- More than **90% of farmers are unsatisfied by the actions taken**, or not, **by the authorities** in response to the protests.

2 Farmers still face lots of issues, primarily economical

- **Pessimism is high** among EU farmers: they value their work as a **rewarding and passionate profession** but faces **too many economical constraints**
- 2/3rd of farmers declared **not being able to invest** and modernize their operation or **have a decent paycheck**. Half cannot easily **repay their farms expenses**.
- Half of the farmers estimates that **their economical situation worsened** since last year.

3 Hope remains to improve EU agriculture and avoid quitting and protests

- **55% of the farmers are willing to protest again** in 2025
- Farmers need support from the authorities on:
 - **Economical support**, whereas being a redistribution of the value from the value chain, or less taxes or subsidies
 - **Alleviation on the administrative** workload
 - **Maintaining the crop protection toolbox** and ensure market access to these solutions

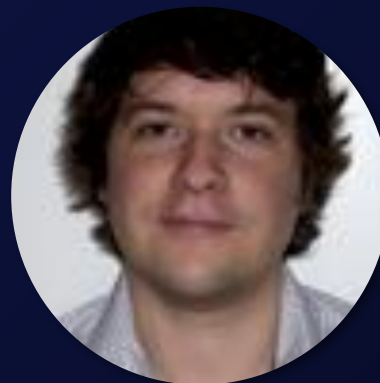
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This project has been designed according to Ipsos Quality standards.
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It was reviewed and approved by: *Damien Barnier, Head of Ipsos Lyon*

APPENDICES

© Ipsos | Crop Life Europe - 1 year
after farmers' protests | April 2025 |
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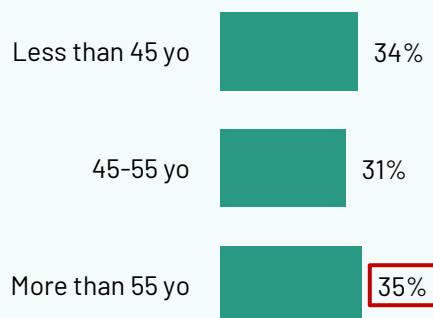
Methodology note

- ✓ On the slides having the mention “*Note: Results shown on a selection of farmers, not as representative as the full sample.*”, the results are not shown on the total sample.
- ✓ Due to long duration of the questionnaire during fieldwork, some questions have been taken away. The sample may be unbalanced on those questions, but they are showing interesting tendencies that was worth noting.
- ✓ Please interpret those questions with cautious and consider them as secondary.

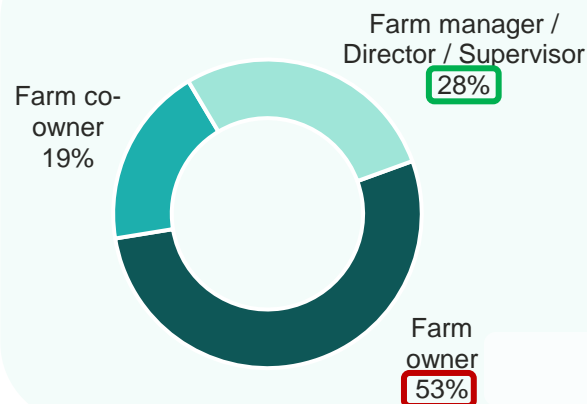
Profile – France



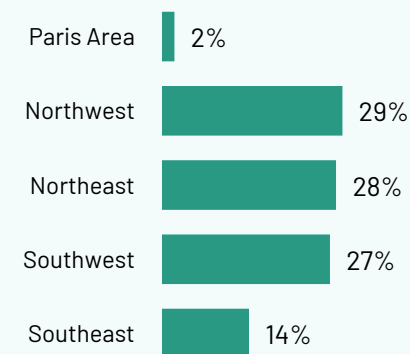
AGE



POSITION IN FARM



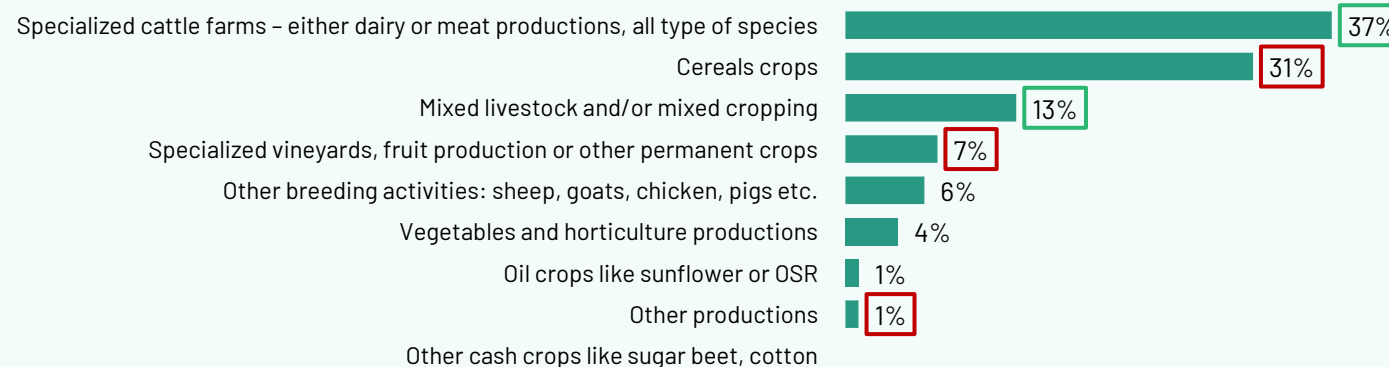
REGION



FARM SIZE



MAIN PRODUCTIONS



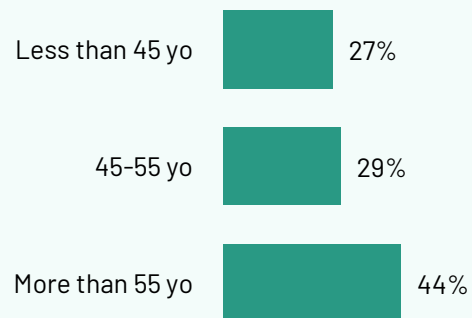
Base: 255 – All

A2: How many [ha/acres] of agricultural land did you farm in total in 2024? / A4: Are you the...? / A5: How old are you? / A6: How many years of farming experience do you have? / F1: In which region is your farm located? / F2: Which of these activities best describes your main production?

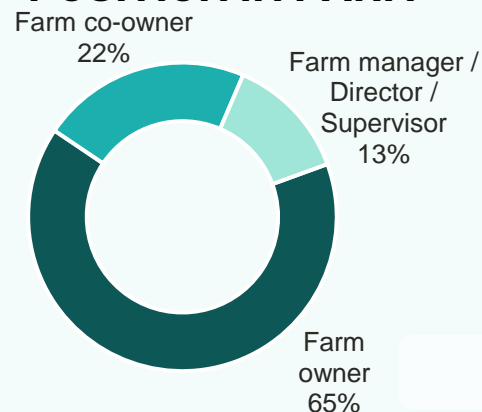
Profile – Germany



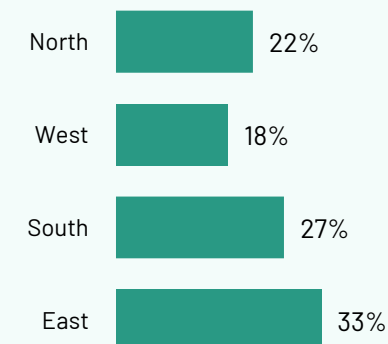
AGE



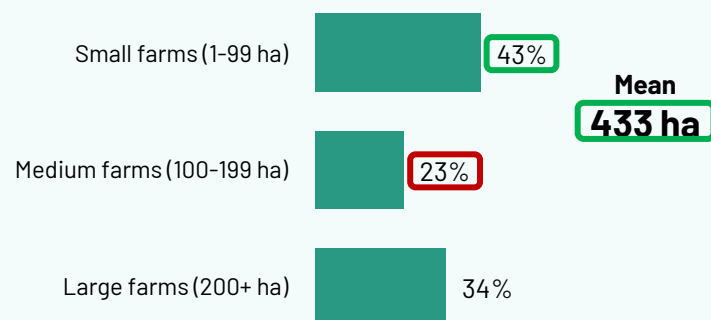
POSITION IN FARM



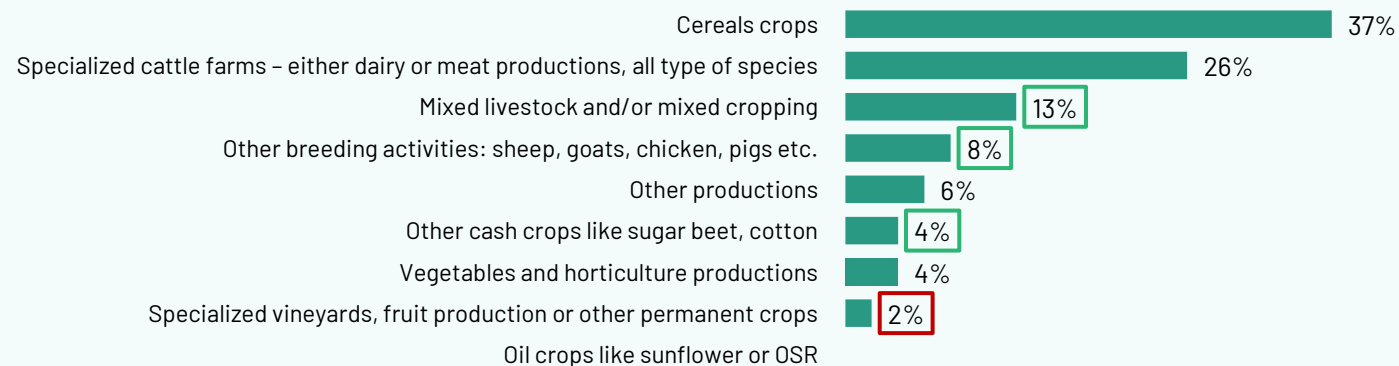
REGION



FARM SIZE



MAIN PRODUCTIONS



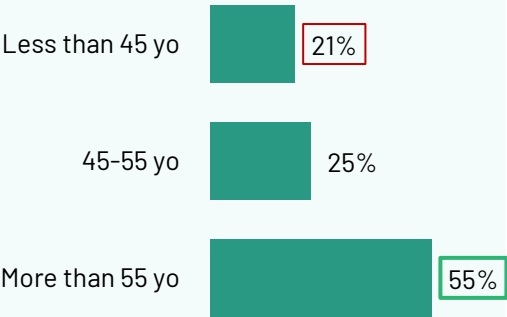
Base: 253 – All

A2: How many [ha/acres] of agricultural land did you farm in total in 2024? / A4: Are you the...? / A5: How old are you? / A6: How many years of farming experience do you have? / F1: In which region is your farm located? / F2: Which of these activities best describes your main production?

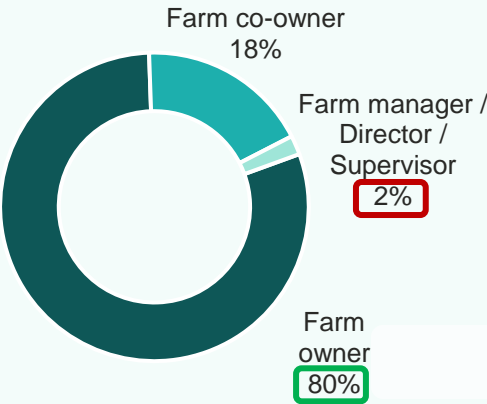
Profile – Spain



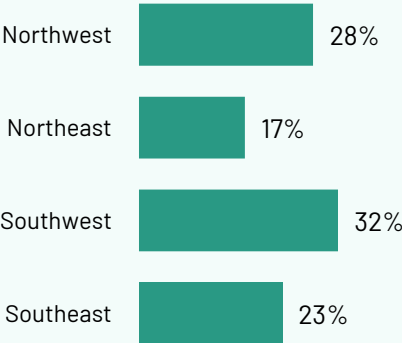
AGE



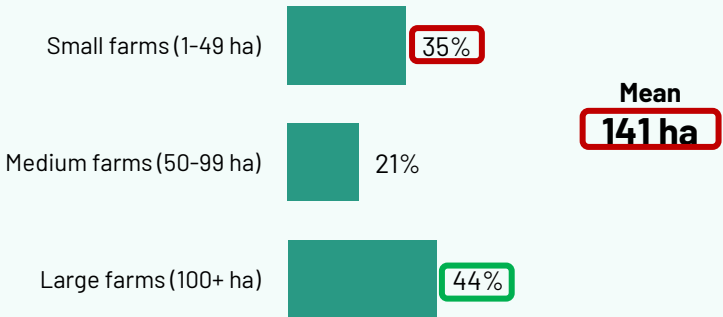
POSITION IN FARM



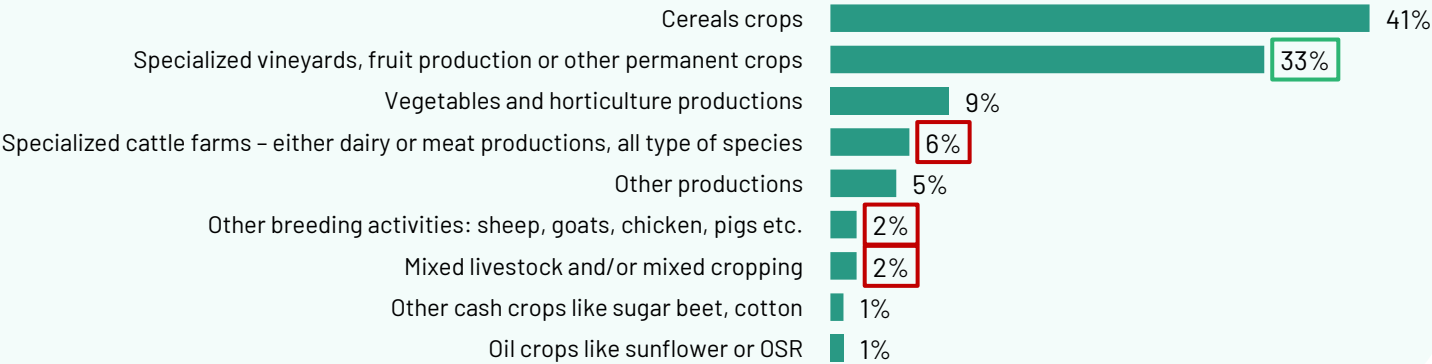
REGION



FARM SIZE



MAIN PRODUCTIONS



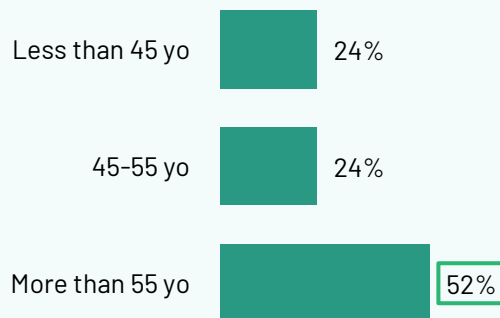
Base: 251 – All
A2: How many [ha/acres] of agricultural land did you farm in total in 2024? / A4 : Are you the...? / A5 : How old are you? / A6 : How many years of farming experience do you have ? / F1 : In which region is your farm located? / F2 : Which of these activities best describes your main production?



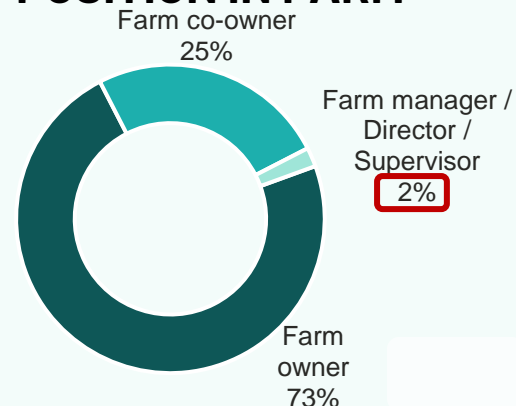
Profile – Italy



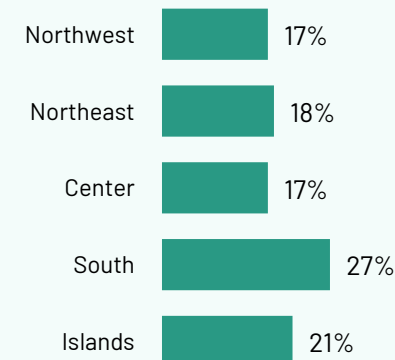
AGE



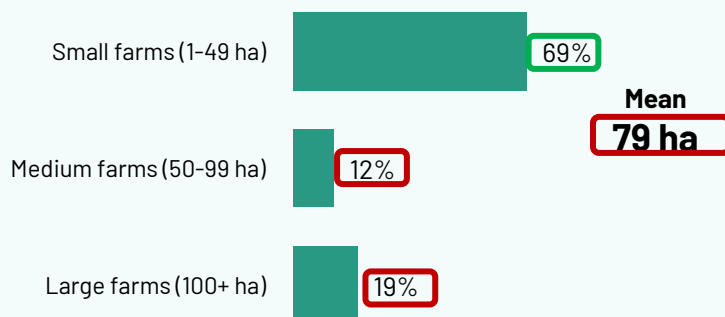
POSITION IN FARM



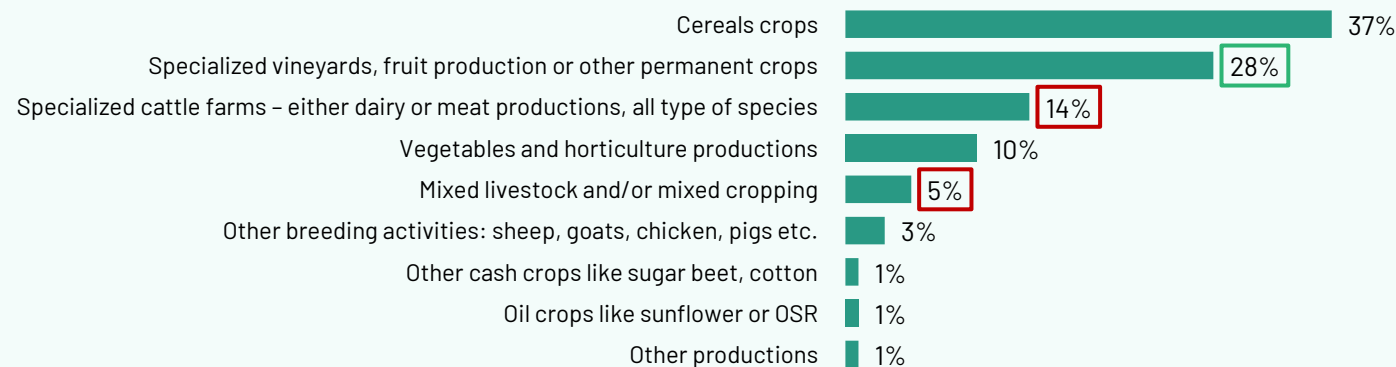
REGION



FARM SIZE



MAIN PRODUCTIONS



Base: 230 – All

A2: How many [ha/acres] of agricultural land did you farm in total in 2024? / A4: Are you the...? / A5: How old are you? / A6: How many years of farming experience do you have? / F1: In which region is your farm located? / F2: Which of these activities best describes your main production?

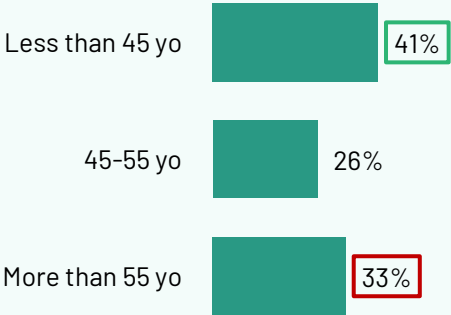
Profile – Poland



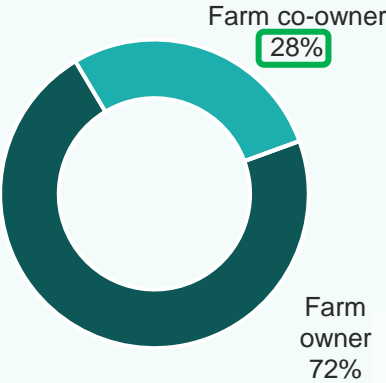
AGE



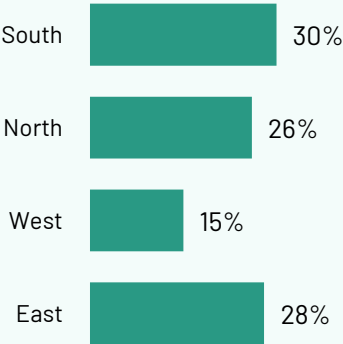
AGE



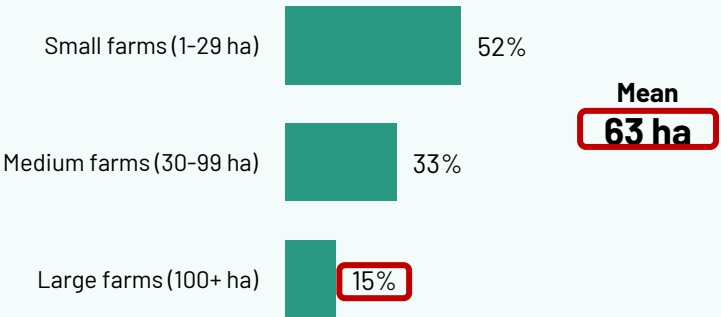
POSITION IN FARM



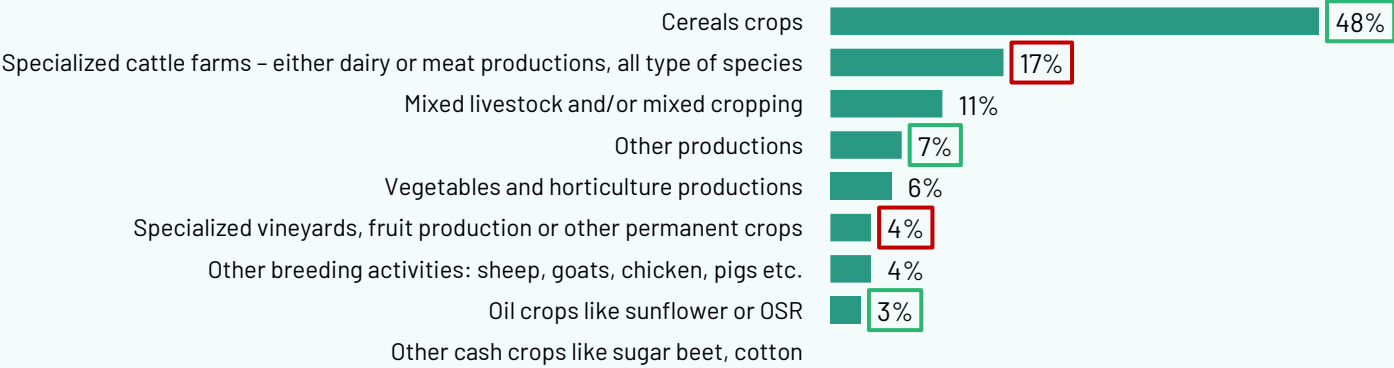
REGION



FARM SIZE



MAIN PRODUCTIONS

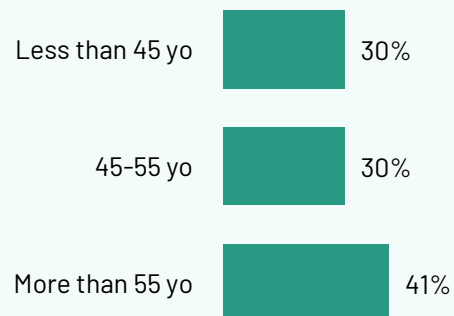


Base: 275 – All
A2: How many [ha/acres] of agricultural land did you farm in total in 2024? / A4 : Are you the...? / A5 : How old are you? / A6 : How many years of farming experience do you have ? / F1 : In which region is your farm located? / F2 : Which of these activities best describes your main production?

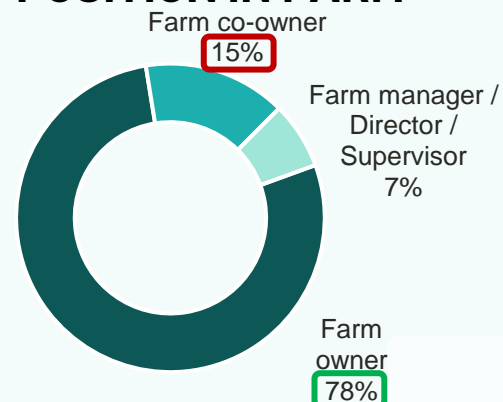
Profile – Romania



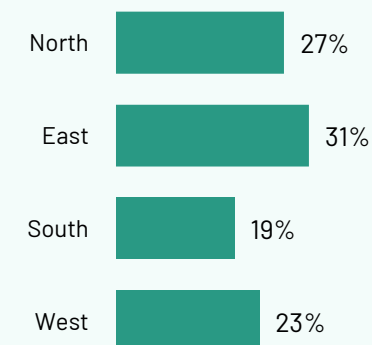
AGE



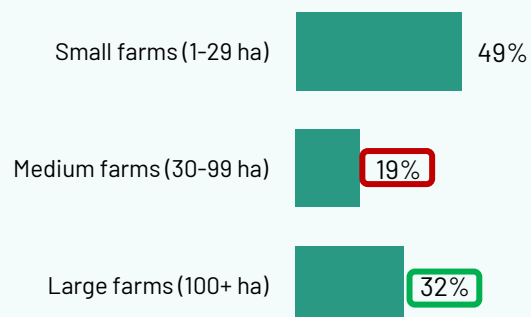
POSITION IN FARM



REGION

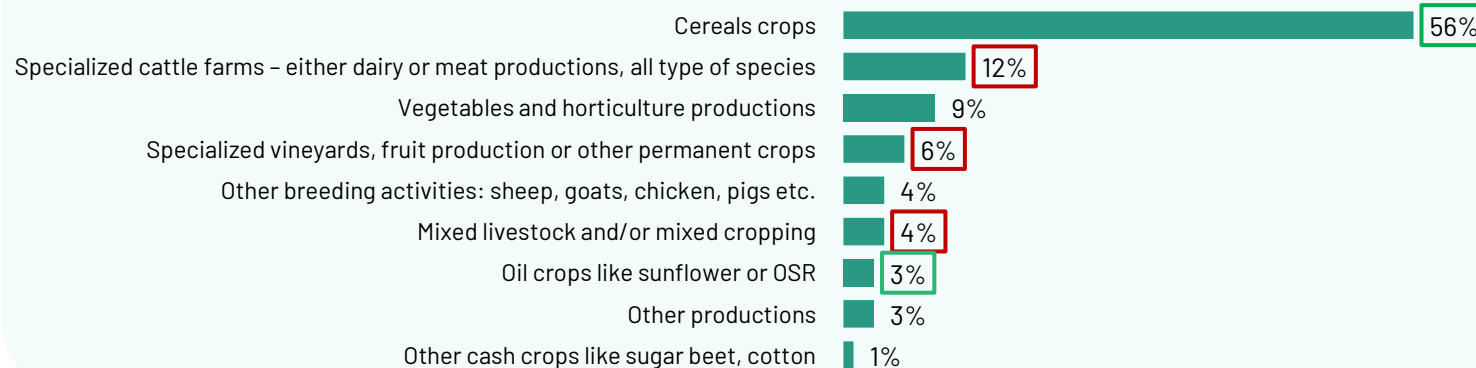


FARM SIZE



Mean
188 ha

MAIN PRODUCTIONS



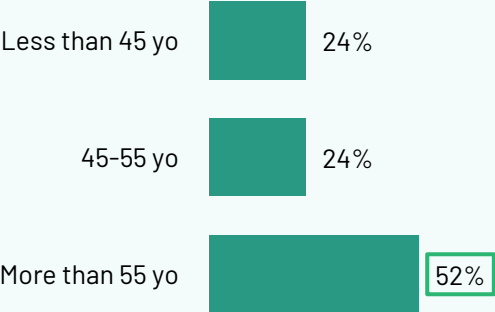
Base: 226 – All

A2: How many [ha/acres] of agricultural land did you farm in total in 2024? / A4: Are you the...? / A5: How old are you? / A6: How many years of farming experience do you have? / F1: In which region is your farm located? / F2: Which of these activities best describes your main production?

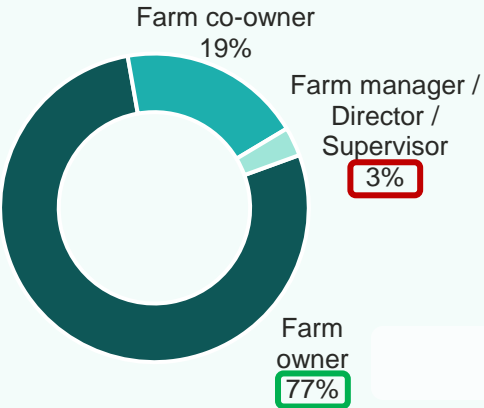
Profile – Ireland



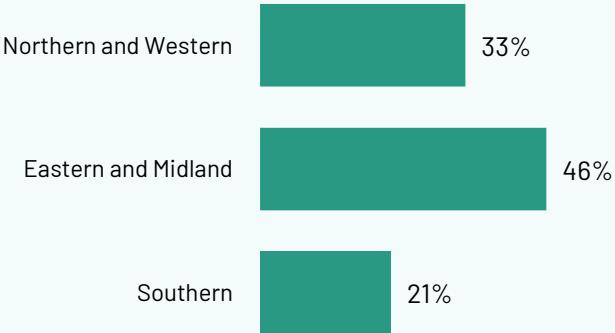
AGE



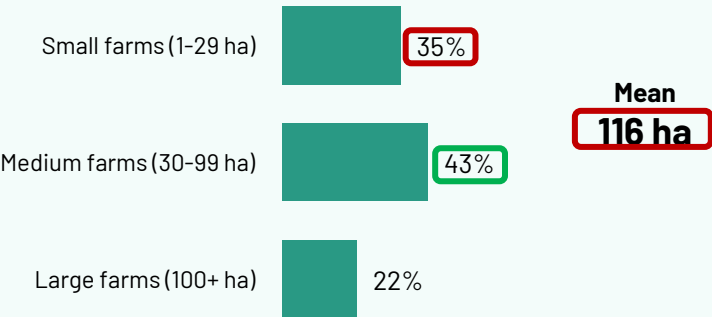
POSITION IN FARM



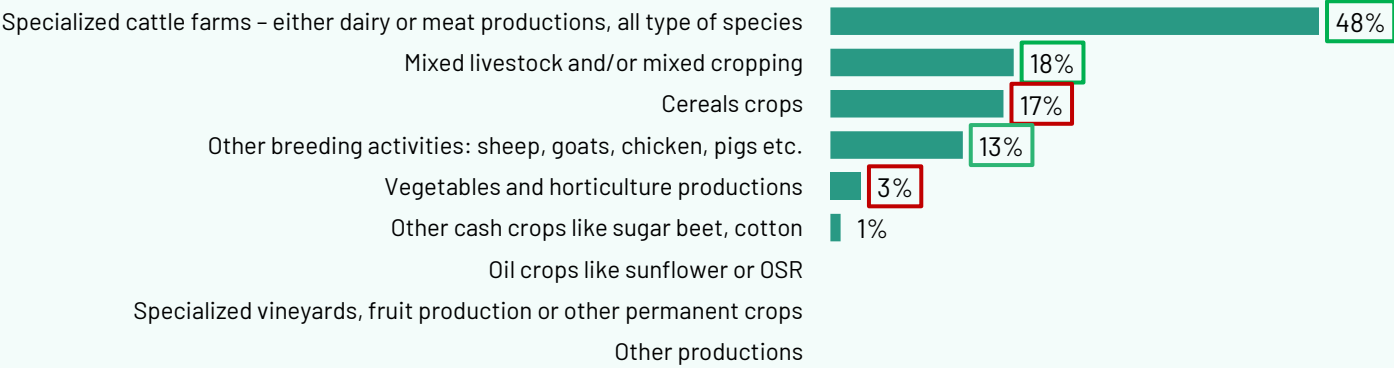
REGION



FARM SIZE



MAIN PRODUCTIONS

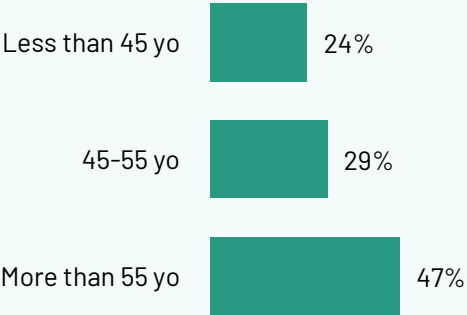


Base: 169 – All
A2: How many [ha/acres] of agricultural land did you farm in total in 2024? / A4 : Are you the...? / A5 : How old are you? / A6 : How many years of farming experience do you have ? / F1 : In which region is your farm located? / F2 : Which of these activities best describes your main production?

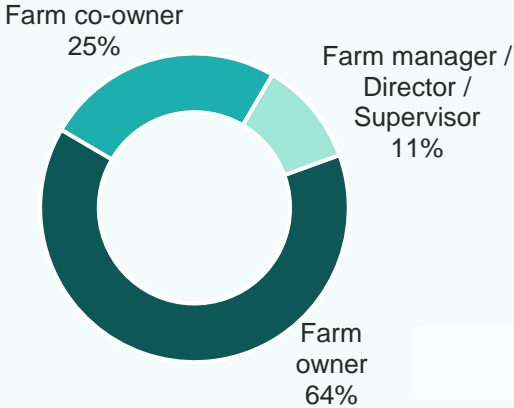
Profile – Belgium



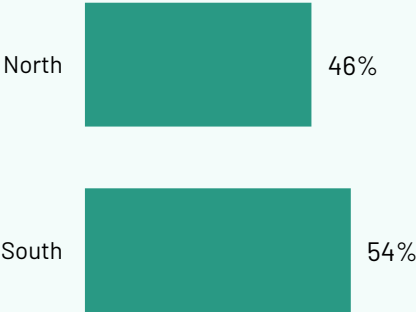
AGE



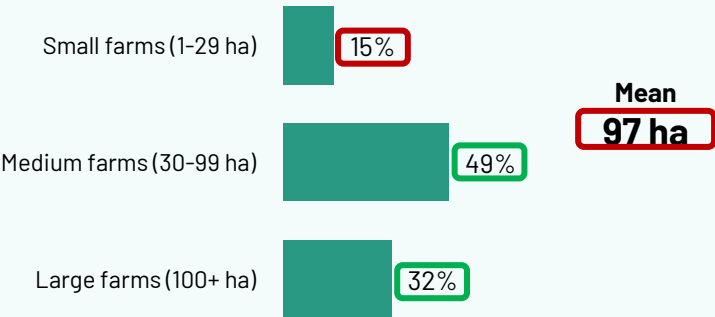
POSITION IN FARM



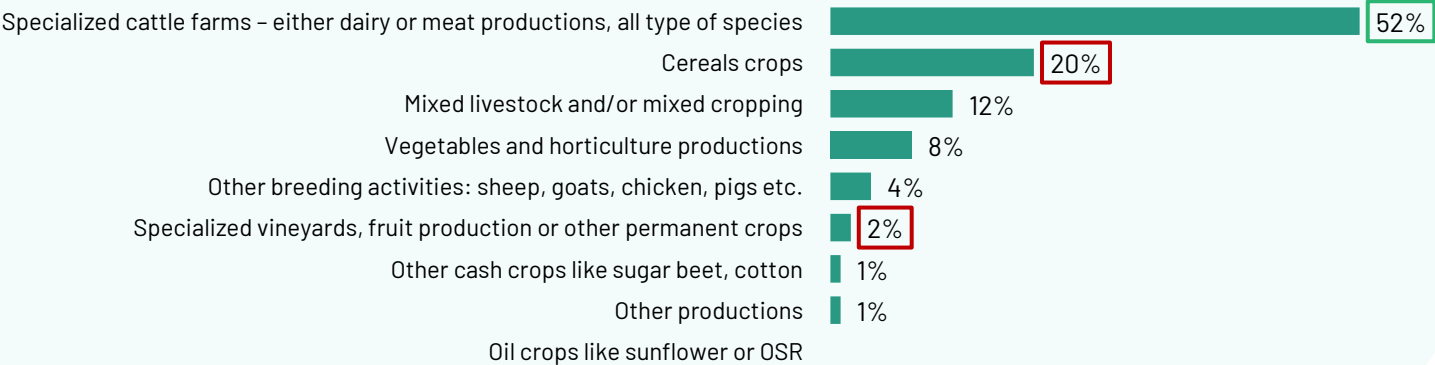
REGION



FARM SIZE



MAIN PRODUCTIONS



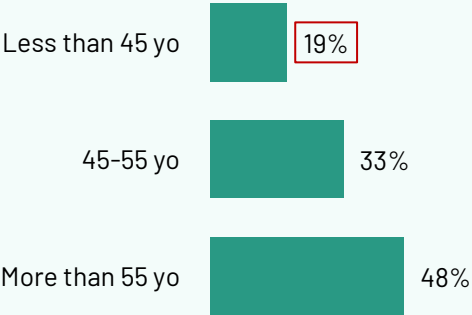
Base: 165 – All
A2: How many [ha/acres] of agricultural land did you farm in total in 2024? / A4 : Are you the...? / A5 : How old are you? / A6 : How many years of farming experience do you have ? / F1 : In which region is your farm located? / F2 : Which of these activities best describes your main production?



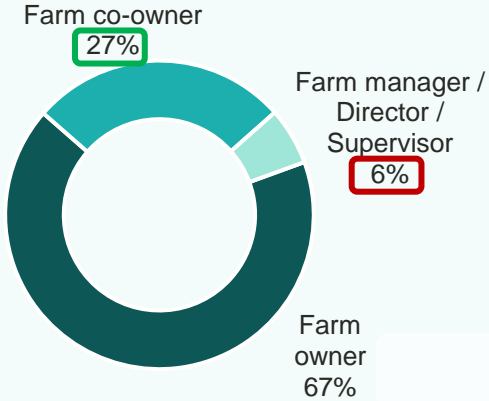
Profile – Netherlands



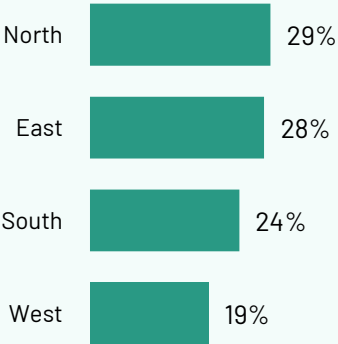
AGE



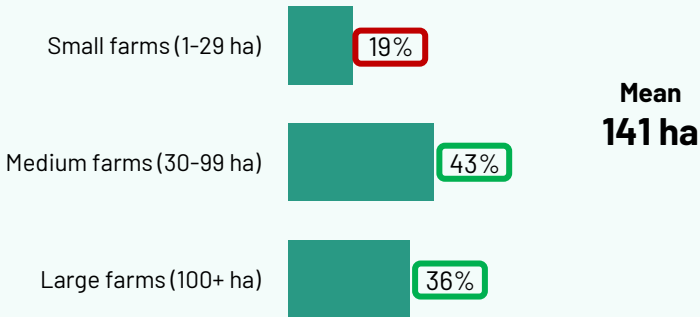
POSITION IN FARM



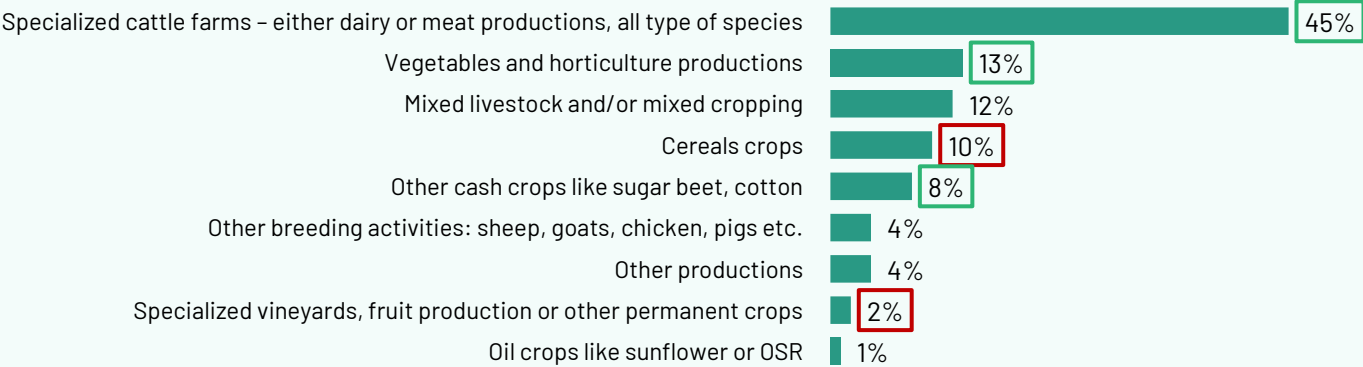
REGION



FARM SIZE



MAIN PRODUCTIONS

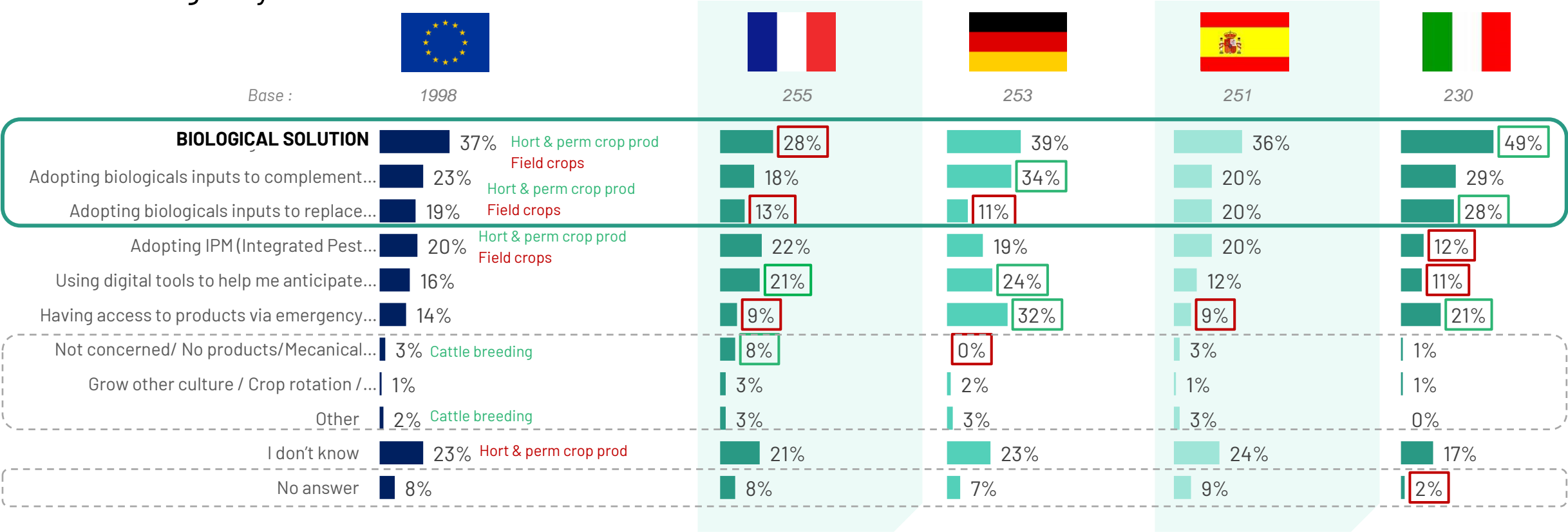


Base: 174 – All
A2: How many [ha/acres] of agricultural land did you farm in total in 2024? / A4 : Are you the...? / A5 : How old are you? / A6 : How many years of farming experience do you have ? / F1 : In which region is your farm located? / F2 : Which of these activities best describes your main production?



Pest and diseases management - 1/2

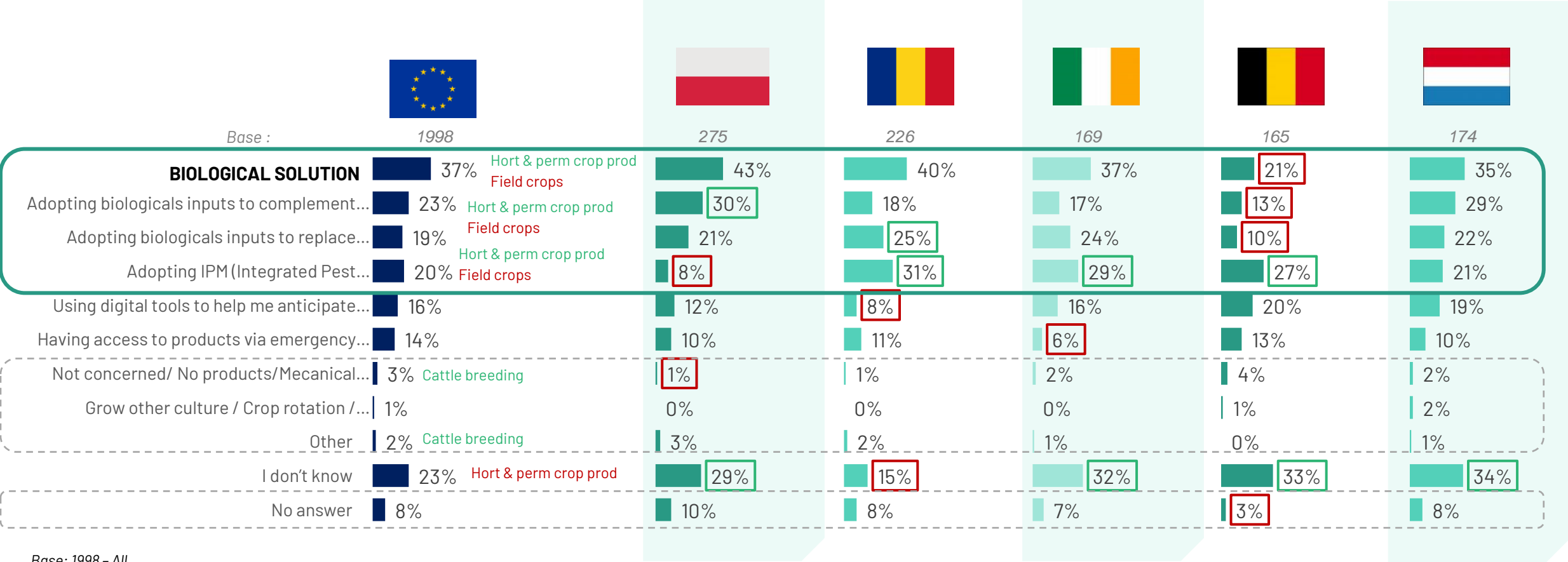
No strong solution is preferred when dealing with increased pests' pressure. Biological solutions are mostly preferred over other solutions but with country differences. France and Germany also use digital tools. In Italy, the use of biological products is more developed, but some farmers also benefit from emergency authorizations.



Base: 1998 - All
B5B: How are you dealing with the impact of increased pressure in pests and diseases while having less access to crop protection products?

Pest and diseases management - 2/2

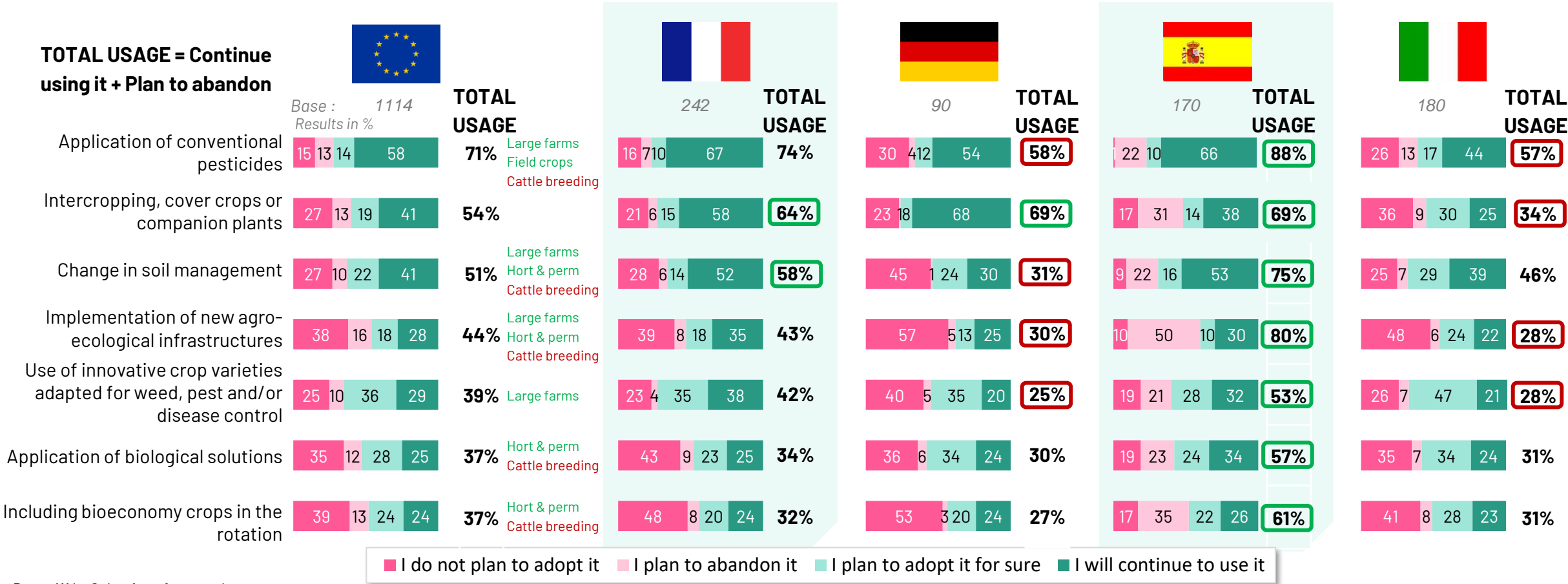
A higher number of farmers don't know how to deal with increased pests' pressure in PL, IE, BE and NTH. The use of IPM techniques are also more developed in RO, IE and BE. Belgium, along with France, is the country using the less biological solutions overall.



Base: 1998 - All
B5B: How are you dealing with the impact of increased pressure in pests and diseases while having less access to crop protection products?

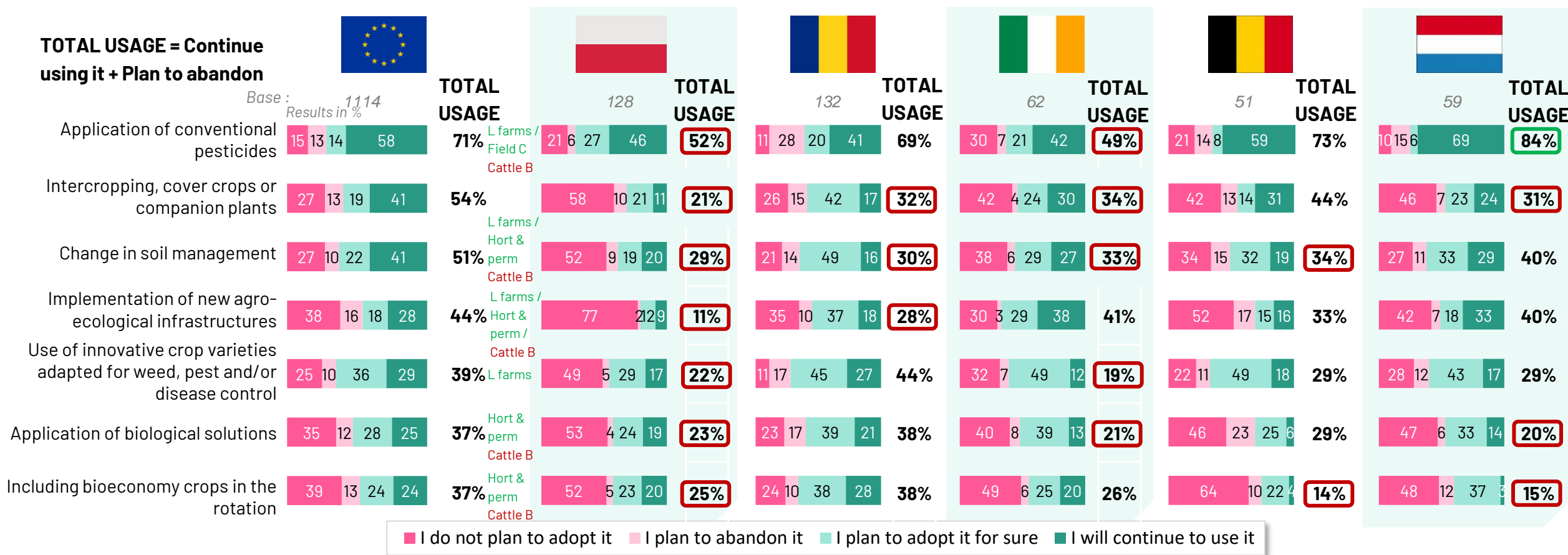
New agronomic practices - 1/2

The “agroecological” practices are quite well-developed especially in Spain where usage of new practices is very high but with also a higher abandon rates planned in the next years. The application of conventional pesticides remains the #1 practice in most countries.



New agronomic practices - 2/2

The use of innovative crop varieties adapted to certain pests is the practice that will likely grow the most in the next 3 to 5 years all across Europe, and so does the application of biological solutions.

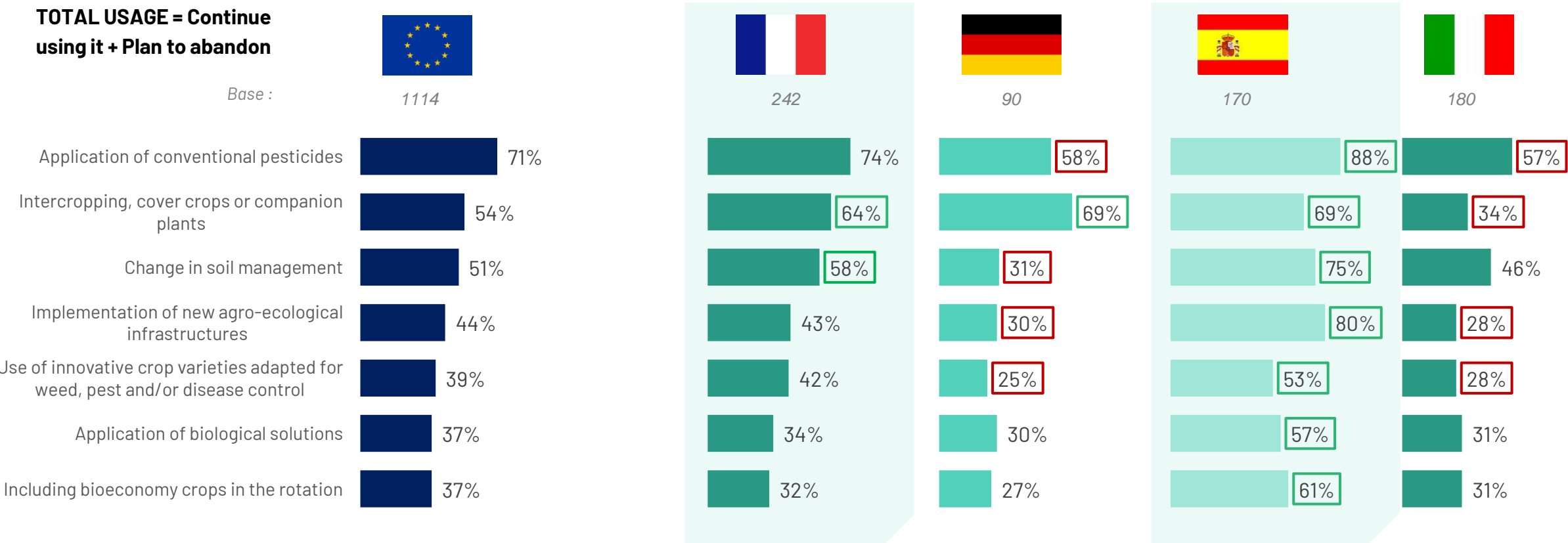


Base: 1114 - Selection of respondents

B6: For your crop production tell me what you think about the use of the following agronomic practices in the next 3 to 5 years: if you plan to continue using it, you plan to adopt it for sure, abandon it, or not adopt it?

New agronomics practices **TOTAL USAGE - 1/2**

The “agroecological” practices are quite well-developed especially in Spain where usage is very high but with also a higher abandon rate plan in the next years. The application of conventional pesticides remain the #1 practice in most countries.

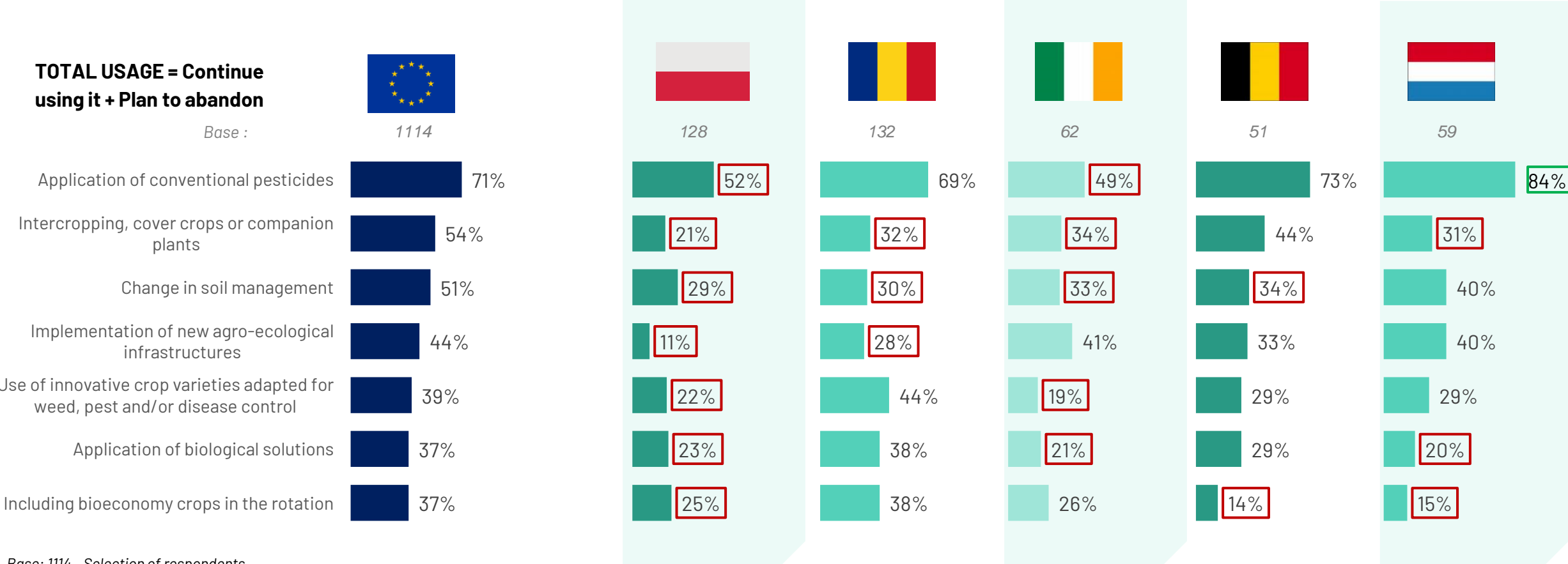


Base: 1114 – Selection of respondents

B6: For your crop production tell me what you think about the use of the following agronomic practices in the next 3 to 5 years: if you plan to continue using it, you plan to adopt it for sure, abandon it, or not adopt it?

New agronomic practices **TOTAL USAGE - 2/2**

In the Eastern countries such as Poland and Romania, the implementation of intercropping, the soil management and the implementation of agro-ecological infrastructures have been less adopted. Belgian and Netherlands farmers have one the highest rates of adoption of conventional pesticides



Base: 1114 – Selection of respondents

B6: For your crop production tell me what you think about the use of the following agronomic practices in the next 3 to 5 years: if you plan to continue using it, you plan to adopt it for sure, abandon it, or not adopt it?

New agronomic practices **TOTAL POTENTIAL GROWTH - 1/2**

The use of innovative crop varieties adapted to certain pests is the practice that will likely grow the most in the next 3 to 5 years all across Europe, and so does the application of biological solutions. Within the high adoption rates in Spain, high abandon rates are also planned : agroecological infrastructures, intercropping...

TOTAL USAGE = Continue using it + Plan to abandon **GROWTH POTENTIAL** = Plan to adopt it - Plan to abandon it

	Total		France		Germany		Spain		Italy	
Base	1114		242		90		170		180	
	TOTAL USAGE	GROWTH POTENTIAL	TOTAL USAGE	GROWTH POTENTIAL	TOTAL USAGE	GROWTH POTENTIAL	TOTAL USAGE	GROWTH POTENTIAL	TOTAL USAGE	GROWTH POTENTIAL
Application of conventional pesticides	71%	1 pts	74%	3 pts	58%	8 pts	88%	-12 pts	57%	4 pts
Intercropping, cover crops or companion plants	54%	6 pts	64%	9 pts	69%	7 pts	69%	-17 pts	34%	21 pts
Change in soil management	51%	12 pts	58%	8 pts	31%	23 pts	75%	-6 pts	46%	22 pts
Implementation of new agro-ecological infrastructures	44%	2 pts	43%	10 pts	30%	8 pts	80%	-40 pts	28%	18 pts
Use of innovative crop varieties adapted for weed, pest and/or disease control	39%	26 pts	42%	31 pts	25%	30 pts	53%	7 pts	28%	40 pts
Application of biological solutions	37%	16 pts	34%	14 pts	30%	28 pts	57%	1 pts	31%	27 pts
Including bioeconomy crops in the rotation	37%	11 pts	32%	12 pts	27%	17 pts	61%	-13 pts	31%	20 pts

Base: 1114 – Selection of respondents

B6: For your crop production tell me what you think about the use of the following agronomic practices in the next 3 to 5 years: if you plan to continue using it, you plan to adopt it for sure, abandon it, or not adopt it?

New agronomic practices **TOTAL POTENTIAL GROWTH - 2/2**

Some countries' specifics in terms of growth potential: Romania shows higher interest in adopting intercropping techniques, change in soil management or agroecological infrastructures and Dutch farmers are interest in bioeconomy crops to add in the crop rotation.

TOTAL USAGE = Continue using it + Plan to abandon **GROWTH POTENTIAL** = Plan to adopt it - Plan to abandon it

	Total		Poland		Romania		Ireland		Belgium		Netherlands	
Base	1114		128		132		62		51		59	
	TOTAL USAGE	GROWTH POTENTIAL	TOTAL USAGE	GROWTH POTENTIAL	TOTAL USAGE	GROWTH POTENTIAL	TOTAL USAGE	GROWTH POTENTIAL	TOTAL USAGE	GROWTH POTENTIAL	TOTAL USAGE	GROWTH POTENTIAL
Application of conventional pesticides	71%	1 pts	52%	21 pts	69%	-8 pts	49%	14 pts	73%	-6 pts	84%	-9 pts
Intercropping, cover crops or companion plants	54%	6 pts	21%	11 pts	32%	27 pts	34%	20 pts	44%	1 pts	31%	16 pts
Change in soil management	51%	12 pts	29%	10 pts	30%	35 pts	33%	23 pts	34%	17 pts	40%	22 pts
Implementation of new agro-ecological infrastructures	44%	2 pts	11%	10 pts	28%	27 pts	41%	26 pts	33%	-2 pts	40%	11 pts
Use of innovative crop varieties adapted for weed, pest and/or disease control	39%	26 pts	22%	24 pts	44%	28 pts	19%	42 pts	29%	38 pts	29%	31 pts
Application of biological solutions	37%	16 pts	23%	20 pts	38%	22 pts	21%	31 pts	29%	2 pts	20%	27 pts
Including bioeconomy crops in the rotation	37%	11 pts	25%	18 pts	38%	28 pts	26%	19 pts	14%	12 pts	15%	25 pts

Base: 1114 - Selection of respondents

B6: For your crop production tell me what you think about the use of the following agronomic practices in the next 3 to 5 years: if you plan to continue using it, you plan to adopt it for sure, abandon it, or not adopt it?

New technologies in European agriculture **TOTAL POTENTIAL GROWTH - 1/2**

As for the practices, Spanish farmers are showing the highest abandon rate, with therefore less growth potential.

TOTAL USAGE = Continue using it + Plan to abandon **GROWTH POTENTIAL** = Plan to adopt it - Plan to abandon it

	Total 1113		France 242		Germany 90		Spain 170		Italy 180	
Base	TOTAL USAGE	GROWTH POTENTIAL	TOTAL USAGE	GROWTH POTENTIAL	TOTAL USAGE	GROWTH POTENTIAL	TOTAL USAGE	GROWTH POTENTIAL	TOTAL USAGE	GROWTH POTENTIAL
Decision support tools on smartphone or tablet on intervention dates, choice of inputs etc.	37%	22 pts	40%	22 pts	28%	29 pts	55%	0 pts	22%	37 pts
Use of satellite imagery	36%	18 pts	32%	20 pts	43%	16 pts	53%	6 pts	27%	29 pts
Use of biological crop protection products	34%	23 pts	28%	21 pts	31%	28 pts	55%	1 pts	31%	42 pts
Sensors for Field, soil moisture sensors, weather stations etc. or embedded on agricultural machinery	33%	19 pts	38%	19 pts	26%	32 pts	45%	1 pts	22%	31 pts
Variable rate application or spot spraying	32%	24 pts	20%	28 pts	29%	17 pts	62%	4 pts	22%	42 pts
Use of seeds created with new genomic techniques	26%	22 pts	18%	34 pts	10%	21 pts	54%	-12 pts	9%	37 pts
Use of drones and/or autonomous agricultural robots for field operations	19%	17 pts	15%	22 pts	9%	23 pts	42%	-1 pts	3%	32 pts

Base: 1114 – Selection of respondents

B7: And tell me what you think about the use of the following technologies in the next 3 to 5 years: if you plan to continue using it, you plan to adopt it for sure, abandon it, or not adopt it?

New technologies in European agriculture **TOTAL POTENTIAL**

GROWTH - 2/2

DSTs, variable rate application and biological CP products are the new technologies showing the highest growth potentials.

TOTAL USAGE = Continue using it + Plan to abandon **GROWTH POTENTIAL** = Plan to adopt it - Plan to abandon it

	Total		Poland		Romania		Ireland		Belgium		Netherlands	
Base	1113		127		132		62		51		59	
	TOTAL USAGE	GROWTH POTENTIAL	TOTAL USAGE	GROWTH POTENTIAL	TOTAL USAGE	GROWTH POTENTIAL	TOTAL USAGE	GROWTH POTENTIAL	TOTAL USAGE	GROWTH POTENTIAL	TOTAL USAGE	GROWTH POTENTIAL
Decision support tools on smartphone or tablet on intervention dates, choice of inputs etc.	37%	22 pts	26%	17 pts	28%	39 pts	34%	30 pts	18%	33 pts	39%	37 pts
Use of satellite imagery	36%	18 pts	16%	13 pts	32%	29 pts	35%	29 pts	18%	28 pts	43%	27 pts
Use of biological crop protection products	34%	23 pts	21%	27 pts	30%	44 pts	21%	37 pts	26%	12 pts	37%	23 pts
Sensors for Field, soil moisture sensors, weather stations etc. or embedded on agricultural machinery	33%	19 pts	15%	19 pts	28%	34 pts	39%	12 pts	20%	23 pts	46%	34 pts
Variable rate application or spot spraying	32%	24 pts	24%	19 pts	31%	36 pts	37%	21 pts	16%	29 pts	34%	49 pts
Use of seeds created with new genomic techniques	26%	22 pts	16%	9 pts	33%	35 pts	11%	35 pts	16%	41 pts	25%	38 pts
Use of drones and/or autonomous agricultural robots for field operations	19%	17 pts	8%	5 pts	22%	31 pts	9%	23 pts	6%	21 pts	20%	32 pts

Base: 1114 - Selection of respondents

B7: And tell me what you think about the use of the following technologies in the next 3 to 5 years: if you plan to continue using it, you plan to adopt it for sure, abandon it, or not adopt it?

QUALITY PROCESSES



OUR COMMITMENTS

PROFESSIONAL CODES, QUALITY CERTIFICATION CONSERVATION AND DATA PROTECTION

Ipsos is a member of the following French and European market and opinion research professional bodies:

- **SYNTEC (professional union of market research companies in France; www.Syntec-etudes.Com)**
- **ESOMAR (European Society for Opinion and Market Research, www.Esomar.Org)**



**Ipsos France is certified ISO 20252 :
Market Research - version 2019
BY AFNOR CERTIFICATION**

This document has been produced in compliance with these international codes and standards.

Ipsos France undertakes to apply the **ICC/Esomar** code for market and opinion research. This code defines the ethical rules for market research professionals and establishes the protective measures from which the persons questioned benefit. Ipsos is committed to complying with applicable laws.



Ipsos has appointed a Data Protection Officer and has implemented a compliance plan with the General Data Protection Regulation (Regulation 5EU) 2016/679). For more information on our personal data protection policy: <https://www.ipsos.com/fr-fr/confidentialite-et-protection-des-donnees-personnelles>

As such, the retention period for the personal data of people interviewed as part of a study is, unless there is a specific contractual commitment:

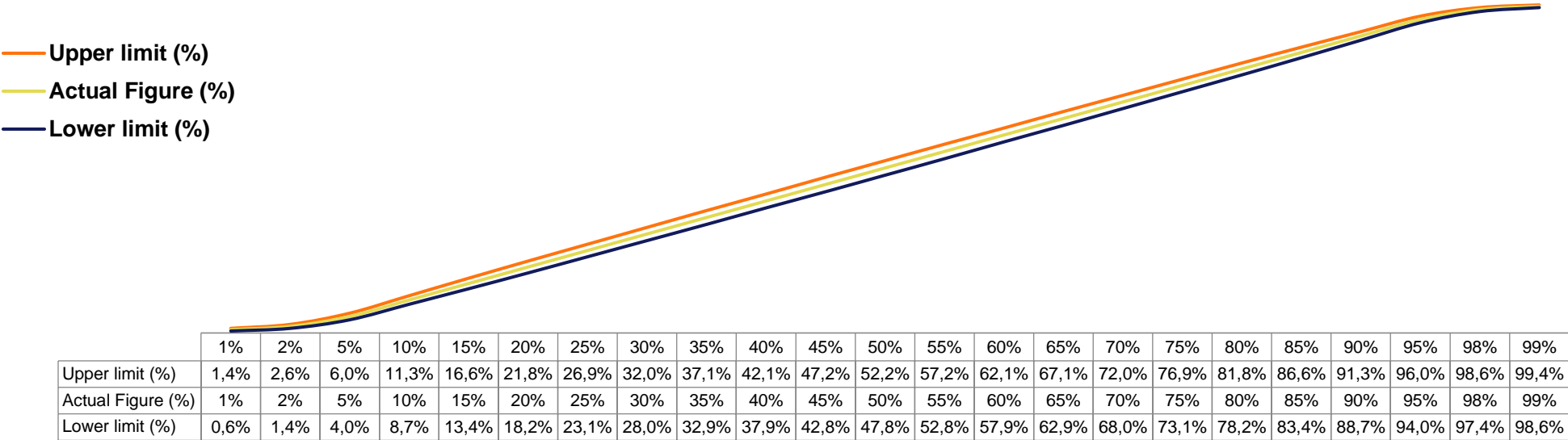
- 12 months following the end date of an Ad Hoc study.
- 36 months following the end date of each wave of a recurring study.

RELIABILITY OF RESULTS SPREADSHEET

In this instance, with regard to this study:

- Confidence interval: 95%
- Size of sample: 1998

The proportions observed are between :



SURVEY OVERVIEW

Web intercept method

SAMPLE

- **Target** : 1998 farmers
- **Data sources coming from web intercept method on social network platforms (Facebook, Instagram)**
 - Random sample established from a broad list of contacts generated on web intercept method.
 - As main segments targeted: all type of farms, all type of productions
- **Sample representativeness** : criteria and sources: farm size, regions, age (Eurostat data)

DATA COLLECTION

- **Fieldwork dates**: 5 mars 2025 – 3 avril 2025
- **Final sample size** : 1998 farmers in nine european countries
255 in France / 253 in Germany / 251 in Spain / 230 in Italy / 275 in Poland / 226 in Romania / 169 in Ireland / 165 in Belgium / 174 in The Netherlands
- **Data collection**: Web intercept method with Episto
- Data will be kept on a protected network for 1 years

DATA PROCESSING

- Weighted
- Method used: Rim Weighting Method
- Weighting criteria: age, country, farm size and region

RELIABILITY OF RESULTS:

Self completion online surveys

To ensure the overall reliability of a survey, all possible error components must be taken into account. That is why Ipsos imposes strict controls and procedures at each stage of the survey process.

UPSTREAM OF THE DATA COLLECTION

- **Sample** : structure and representativeness
- **Questionnaire** : the questionnaire is worded by following an editing process with 12 compulsory standards. It is proofread and approved at a senior level and then sent to the client for final validation. The programming (or questionnaire script) **is tested by at least 2 people and validated.**
- **Data collection** : the interviewers are trained in survey techniques through a dedicated training module prior to any participation in a survey. In addition, they receive or attend a detailed briefing at the start of each survey.

DURING THE DATA COLLECTION

- **Sampling** : Ipsos imposes very strict operating rules for its selection frame in order to maximize the random nature of the sample selection : random selection from telephone listings, quota method, etc.

- **Fieldwork monitoring** : collection is monitored and checked (exclusive link, IP validation, panelists' behavior monitoring penetration, interview length, consistency of responses, participation rate, number of reminders, etc.)

DOWNSTREAM OF THE DATA COLLECTION

- The results are analyzed in accordance with the statistical analysis methods (confidence interval versus sample size, significance tests). The first results are systematically checked against the raw results from the data collection. The consistency of results is also checked (particularly the results observed versus comparison sources in our possession).
- In cases where sample weighting is used (margin calibration method), this is checked by the processing teams (DP) and then validated by the survey teams.

Survey overview

Organization (Web Intercept Method)

ACTIVITIES CARRIED OUT OR COORDINATED BY IPSOS TEAMS IN FRANCE

- Design and methodology
- Conception and design of questionnaire/ validation of scripting
- Coordination and validation of translation
- Coordination of data collection
- Coordination of coding and validation of code frame
- Data processing
- Validation of the statistical analyses
- Creation of survey report
- Results presentation design
- Formatting of results
- Oral presentation Analyses and summary

ACTIVITIES CARRIED OUT BY IPSOS EXPERT LOCAL TEAMS

- Coding

ACTIVITIES ENTRUSTED TO OUR APPROVED PARTNERS

- Translation
- Scripting
- Data collection **IN FRANCE**
- Data processing
- Formatting of results

Survey materials (questionnaire)



Document
Microsoft Word

Original
version



Document
Microsoft Word

Shorten version
(for LOI)

ABOUT IPSOS

Ipsos is one of the largest market research and polling companies globally, operating in 90 markets and employing nearly 20,000 people.

Our passionately curious research professionals, analysts and scientists have built unique multi-specialist capabilities that provide true understanding and powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees.

Our 75 business solutions are based on primary data from our surveys, social media monitoring, and qualitative or observational techniques.

“Game Changers” – our tagline – summarizes our ambition to help our 5,000 clients navigate with confidence our rapidly changing world.

Founded in France in 1975, Ipsos has been listed on the Euronext Paris since July 1, 1999. The company is part of the SBF 120, Mid-60 indices, STOXX Europe 600 and is eligible for the Deferred Settlement Service (SRD).

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GAME CHANGERS

In our world of rapid change, the need of reliable information to make confident decisions has never been greater.

At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People.

To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can act faster, smarter and bolder. Ultimately, success comes down to a simple truth:

You act better when you are sure.

THANK YOU

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