



Results of the survey
“Identifying young farmers’ vision on the future of agriculture in the EU”

presented to Mariann Fischer Boel, Commissioner for Agriculture and Rural Development
"What future for our agriculture? - A day of dialogue"
European Young Farmers Day, Brussels, 17 April 2007

The young farmers' vision for the European model of farming
– how can the CAP reach this objective?

Executive summary: Tremendous efforts were made throughout 2006 by Young Farmer’s organisations across Europe to construct a vision of what a successful model of farming could look like after 2013. The results of the intensive grassroots consultation were presented to the European Commissioner for Agriculture and Rural Development, Mrs. Mariann Fischer Boel at the *European Young Farmer’s Day: What future for our agriculture? – A day of dialogue* on April 17th 2007 in Brussels, Belgium. Generally, the survey results indicate that all the raised issues are important and it is difficult to indicate clear preferences. Overall results indicate that the key objectives for European Young Farmers are competitiveness in local markets linked to quality production. At the same time, we see that the need to become competitive on global markets becomes more and more a priority. Innovation and the development of new products have also become very important. There is as well a strong need to retain the concept of multi-functionality in farming after 2013 and protection of the environment, preservation of biodiversity and professional management of rural areas play an important role in our European Model of agriculture. We asked young farmers to identify the tools that they consider as necessary in order to have a well functioning European Model of Agriculture after 2013. Aid for installation and investment in their long-term business project is considered to be vitally important. Equally important are risk management tools. A further strong focus is placed on training and advisory services which include exchange programmes for young farmers. Support for diversification as well as payment for environmental services is ranked as very important to important. In this context, even though Young Farmers still see themselves mainly as producers of food, the idea of a farmer as a provider of public services becomes ever more important.

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A message from the President

It is a great pleasure for me to present the results of our intensive grassroots consultation over the last 12 months to the European Commissioner for Agriculture and Rural Development, Mrs. Mariann Fischer Boel, on the *European Young Farmer's Day: What future for our agriculture? – A day of dialogue*. Tremendous efforts were made by the Young Farmer's organizations across Europe to build up a vision of what a successful model of farming could look like after 2013.

This widespread debate offers an exciting opportunity for European Young Farmers and Rural Youth to actively participate in the development of their own future. Many Young Farmers' organisations therefore considered this bottom-up survey to be very interesting and enriching to get a much clearer picture of what young farmers think of their own future.

The organisations did their very best to distribute the questionnaire amongst the highest possible number of interested people. To give you an idea of our efforts, the questionnaire was translated in over 20 languages, posted to individual young farmers, published on national Young Farmers' websites and also distributed at various professional forums and trainings offered for young farmers. In some cases, even the national Ministry for Agriculture and Rural Development showed interest into the project and the CEJA questionnaire was published at the Ministry's official website. Due to the well established partnership of our organisations with national media, the questionnaire was also issued in professional national magazines in 20 000+ copies and even received significant media attention in television and radio.

With this document I am proud to present you the consolidated version of all these efforts in one document: "The young farmers' vision for the European model of farming – how can the CAP reach this objective?". We opted for a document of three parts adopting a two-layer approach to present the results: Part one outlines quantitative aspects of the survey, its content and the methodology used. Part 2 looks at the overall results of the survey at European level allowing to make first general observations of the wishes and needs of young farmers for the future European Model of Farming. Part 3 then enters into the details of each Member State and presents national results.

Please note however, in the same spirit of the European Young Farmers Day, this document is published at the beginning of our discussion and debate at European level on what future we can imagine for our agriculture and is therefore not conclusive in nature. We plan to have further discussions – at our next Seminar in Lleida, Spain and throughout 2008 – when CEJA celebrates its 50th anniversary.

I would like to thank the Commissioner and her staff in the Cabinet and the Directorate General for the continuous support to this project and young farmers in general.

However, above all I personally would like to thank our members and all young farmers across Europe participating in our survey. It is a prime example of grassroots, participatory democracy, that we need more than ever in the enlarged European Union.



Yours sincerely,

Giacomo Ballari
CEJA President

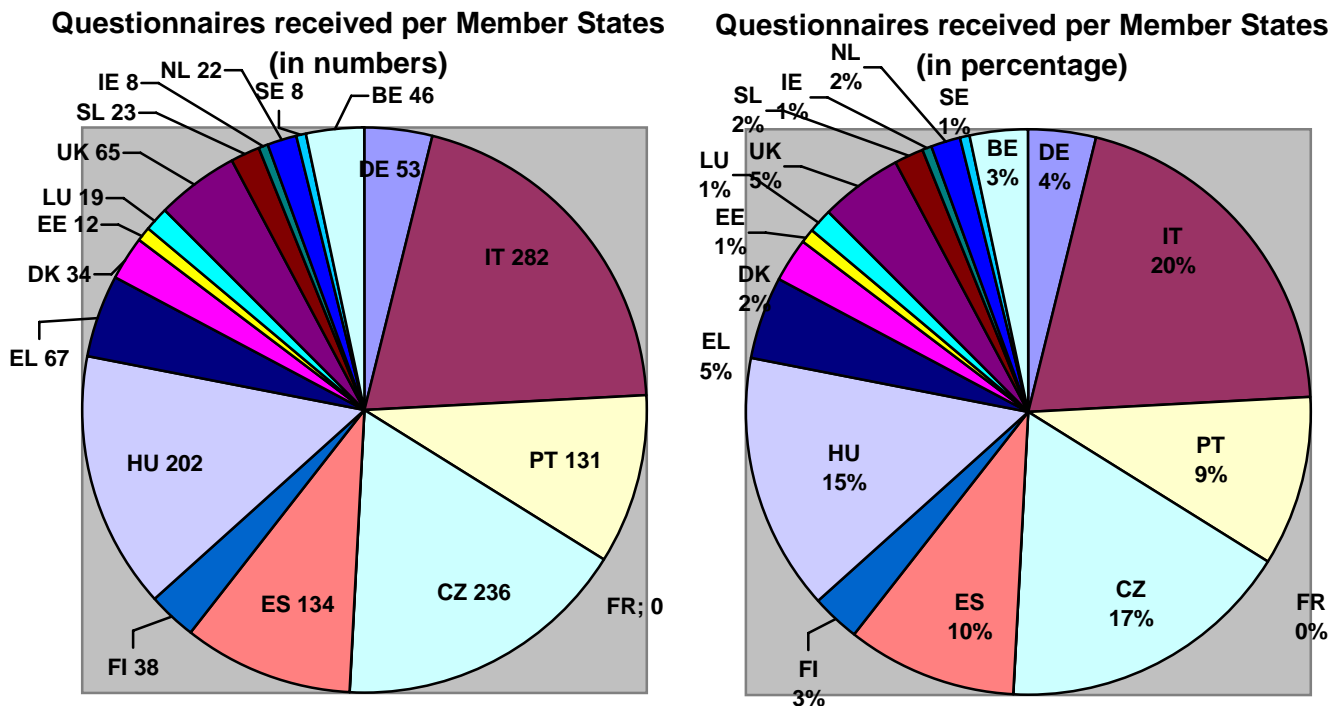
Part I – Quantitative results, content and methodology used

1.1 Participating organisations

CEJA has received survey results from all major regions of the European Union, even if not from all Member States until the end of February 2007. By then, Belgium (FJA, GK), the Czech Republic (SMA CR), Denmark (Landboungdom), Estonia (MTÜ Eesti Noortalunik), Finland (MTK), France (JA), Germany (BDL), Greece (Gesase), Hungary (AGRYA), Ireland (Macra Na Feirme), Italy (AGIA, ANGA and Coldiretti), Luxemburg (LB), the Netherlands (NAJK), Portugal (AJAP), Slovenia (ZSPM), Spain (ASAJA, COAG), Swedish (Lantbrukarnas Riksförbund) and the UK (NFYFC) have sent to CEJA their survey results.

1.2 Quantitative results obtained

All Young Farmers organisations have distributed and published the CEJA questionnaire in various ways using different forms of media and advertising outlets according to their actual capacities. As such, CEJA's bottom-up survey was translated in many languages, posted to individual young farmers, published on national Young Farmers' websites and also distributed at various professional forums and trainings offered to young farmers. In some cases, even the national Ministry for Agriculture and Rural Development showed interest in the project and in one case the CEJA questionnaire was published at the Ministry's official website. Due to the well established partnership of our organizations with national media, the questionnaire was also issued in professional national magazines and even received significant media attention in television and radio. Despite the numerous efforts made, the results greatly vary due to different degrees of responses achieved. Some young farmers have responded in more detail than others. Some young farmers in some countries showed more interest than in others. The graphs below show the answers received by the national organisations in actual numbers and percentages.



Italy, Portugal, Hungary and the Czech Republic sent in the largest number of survey results in relation to their country size, whilst the French young farmers contributed in a written submission by the President. Many of the Young Farmers' organisations that participated in the survey appreciated this CEJA initiative because it allowed them to get a clearer picture of their members' ideas on the future of agriculture. CEJA would like to thank all participants for the enriching experience and the energy many people put into the survey that finally resulted in a good overview of young farmers' visions in the different European Union countries.

1.3 Content of the survey and methodology applied

The questionnaire's objective was to identify the vision of young farmers on the future of agriculture by 2015 and to assist in the definition of a future European Model of Farming. It had been divided in two main parts: the key objectives of such a future model (question 1) and the key policy instruments to reach these objectives (question 2).

Question 1:

Young farmers were asked to evaluate the importance of 13 proposed key objectives defining the European Model of Farming by 2015 in a dreamers approach. They had to choose between 5 levels of importance: no opinion / not important / little important / important / very important. The 13 key objectives were:

Development of local markets	Territorial Balance (keeping people on the land)	Pluri-activity (alternative on-off farming)
Innovation and development of new products	Management of rural landscapes	Protection of the environment
Protection of animal welfare	Multi-functionality	Preservation of biodiversity
Creator of employment	Competitive on the global market	Tourist activity
Quality production		

Some organisations transmitted their results in percentage and some others in the total number of answers per level of importance. We chose therefore to handle all the results in percentage and to present them in a graph highlighting the level of importance which has been mainly chosen per key objective.

Question 2:

The question 2 asked to rank 14 key policy instruments which could assist in the best way for reaching the key objectives. The ranking went from 1 (most important) to 13 (least important). The policy instruments were:

Installation and investment aid (Rural Development Policy)	Risk management tools	Tax exemptions
Border protection	Supply management tools like quota, production areas	Relaxation of national restrictions on land markets
Public/Private storage	Training and advisory services (Rural Development Policy)	No policy tools
Export subsidies	Payment for environmental services (RD)	Other policy tools (please specify)
Decoupled 1 pillar support	Support for diversification (agricultural and non-agricultural activities) (RD)	

As it was the case for the first question, the organisations transmitted their results differently: by adding all rankings per policy instrument, or by calculating an average of ranking for each of them. We chose to calculate an average ranking per policy instrument for each country, and streamline the ranking for better comparison. For example, if the lowest average ranking (= most important) is 2.3 for a policy instrument, we have put the rank 1 to it and so on, allowing to generally identify

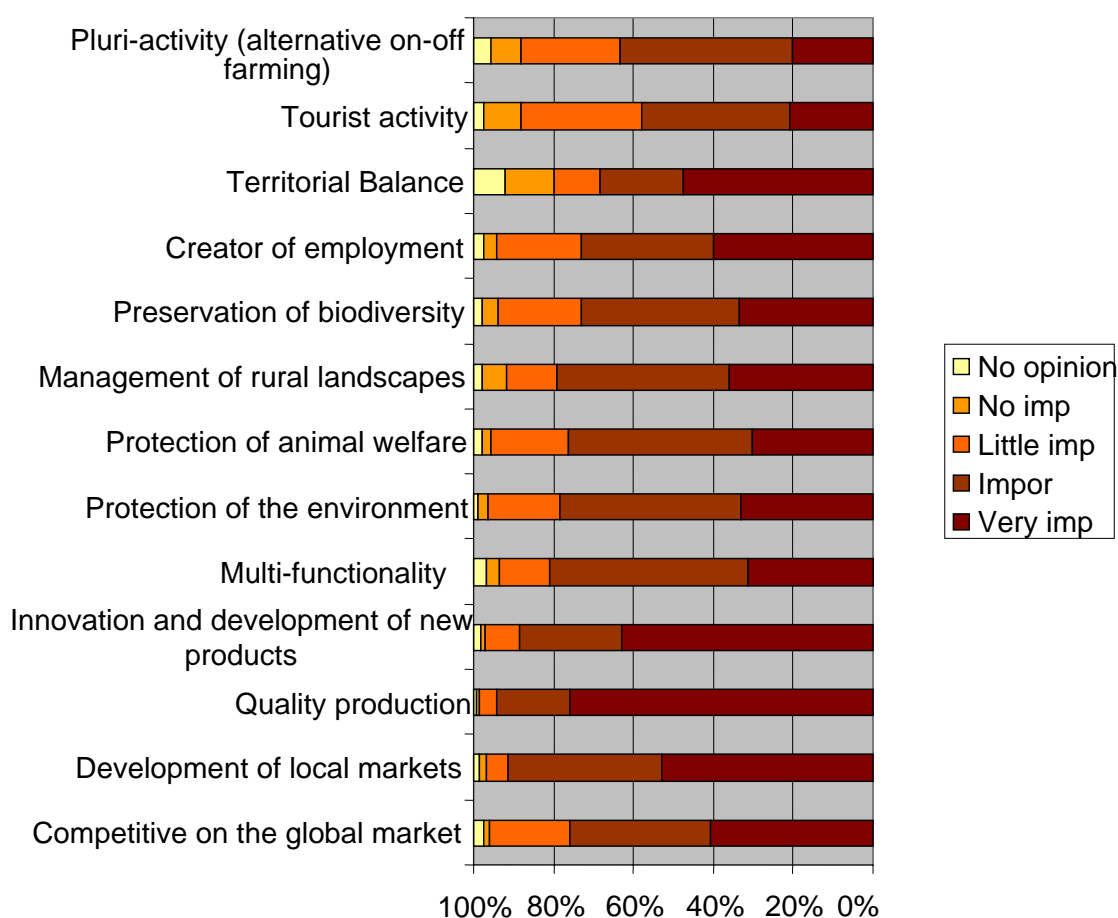
which policy tools are considered to be of higher importance than others. To emphasize efficiently the importance given to the policy instruments, we chose a graph with a spider web shape. The more important the key instrument is considered to be, the more its ranking will be close to the centre. We also joined the EU average curve to compare with each country's priorities.

Part II European Results of the survey “Identifying young farmers’ vision on the future of agriculture in the EU”

In order to present the global European results, CEJA opted in this part of the report to streamline the results obtained and created tables and graphs which allow for easy comparison. The graphs presented in the next section are the average results obtained from all national surveys. A brief interpretation of the main results per country has been made and is presented in the next section.

Question 1: The key objectives identifying the European Model of Farming by 2015 (in a dreamers approach)

Graph 2
EU average: Key objectives identifying the European Model of Farming by 2015



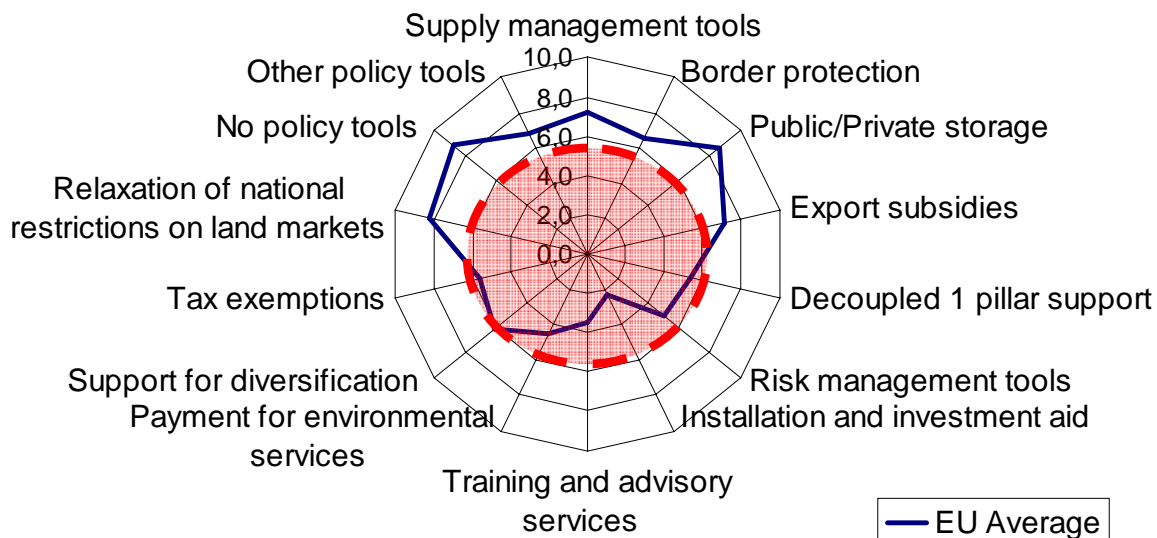
The survey results indicate that three quarters of all young farmers consider most issues raised as important. It is therefore difficult to indicate clear preferences. Such a result indicates the complexities and inter-linkages between the issues that complement each other. Only their sum will finally make up our European Model of farming. Consequently, individual issues can not be seen in isolation.

Nonetheless, our survey results indicate that the key objectives for European young farmers by 2015 appear to be their own competitiveness in context with local markets and quality production. We also state an increasing need to stay competitive on a global level. Innovation and the

development of new products have also taken on a dominant role. The results indicate that there is a strong belief in the concept of multi-functionality in farming after 2013. The services that young farmers give to society, notably the protection of the *environment*, the *preservation of biodiversity* and the *professional management of rural areas* also have an important part in our future European Model of agriculture.

Question 2: The key policy instruments which can help to ensure that the key objectives can be reached (Ranking from 1 (most important) to 13 (least important))

Graph 3
EU Average : Key policy instruments for the Future Model of Farming by 2015 (1=most important - 13=least important)



In the second question we asked young farmers to identify the tools they consider to be necessary in order to have an efficient European Model of Agriculture after 2013. The EU average allows us to quickly identify which tools are considered important. The closer to the centre, the more important this policy tool is for young farmers. The red circle constitutes the area considered “most important – to important”. As it can be clearly seen from this graph, aid for installation and investment in the long-term business project of the farm is considered to be of fundamental importance. Young farmers think that long-term sustainability in agriculture is linked to an integrated approach, bringing together different measures in order to maximise their effects. These survey results clearly support the call for a support “package for young farmers” in which access to funds is linked to installation aid, but more measures can be put at the young farmer’s disposal through a business plan. As the survey results indicate further, investment aid is certainly a proven tool that needs to be maintained, together with advisory services, training and lifelong education, diversification and every other measure that can contribute to the development of competitive and sustainable farming in rural areas. A further strong focus is placed on the knowledge-based European Agricultural Model through lifelong learning, training and advisory services which include an exchange programme for young farmers. They believe that continuous development of suitable skills in the agricultural sector is among the essential elements for the successful evolution of the multifunctional agri-enterprise with its capacity to innovate, modernise and make a profit. Equally, lifelong learning in agriculture is crucial for securing Europe’s food production, ensuring continuous growth, stable employment and competitiveness in rural areas as well as achieving environmental

protection and animal welfare goals in line with society's expectations. Rapid demographic ageing in agriculture and the necessity to facilitate the renewal of generations in rural areas make lifelong education and training a priority investment in the future for young farmers and their agricultural workers.

Assistance with the management of risks takes an equally important place which will gain further importance in the future due to climate change. Mild winters will provoke flooding and hot summers will lead to water shortages and fire outbreaks. Support for diversification as well as payment for environmental services are also ranked as very important to important.

Part III – Results of the survey per country

Executive summary:

When asked what the most important characteristics of the European model of farming by 2015 would be, all respondents were unanimous in identifying the need to ensure **competitiveness**, especially as it relates to the development of **quality products** within **local and global markets**. In Hungary, a difference existed between large and small farms, with the smaller ones citing multi-functionality as a key characteristic. Young farmers in Belgium and Luxemburg especially insisted on the fact that farms run by families should receive financial support in order to survive and Greek young farmers thought it important to distinguish between full time farmers on one hand and hobby or part time farmers on the other. Regarding the instruments and tools that would be necessary to achieve the identified objectives, opinions were more divided. Better risk management tools and payment for environment services was considered important in Denmark, Germany and Sweden, whereas installation and investment aid from the Rural Development Policy was considered a key policy instrument in Portugal, Italy, Belgium and Finland. Finland also identified tax exemptions, supply management tools and more quality control systems as very important. In Hungary, quotas and supply regulators, production-independent regulators, rural development policy and export subsidies were considered necessary. French young farmers clearly stated that only a combination of all elements proposed in the survey can lead to a successful future approach of farming. The Czech Republic, Denmark, Finland, Germany, Greece, the Netherlands, Hungary, Ireland, Italy, Luxemburg, Portugal, Sweden and the UK all identified their top priority as providing quality food. In Spain, a combination of food and non-food production was seen as being a reality in the future while Estonian and Slovenian young farmers see non food, and especially services, as their priority in future production. In Italy the importance of territorial balance and innovation was identified while the Danish and the Estonians put special emphasis on the relaxation of national restrictions on land markets. In general, little importance was given to developing tourism activities, particularly in Portugal and Finland. However, Greek young farmers believe in a future in agricultural tourism, and diversification of farming activities in general was considered important by many young farmers, seeing themselves as becoming more and more multifunctional and as deliverers of services to the public. For most countries future priorities also included protection of the environment and of biodiversity, as well as management of rural landscape and territorial cohesion. Most countries also judged animal welfare as important. Young farmers from the Czech Republic, Estonia and the Netherlands estimated border protection as important because, at least the Eastern European countries considered themselves as competitive in price in the future of farming. Policy tools are not considered as very important by Czech and Estonian young farmers. Swedish and Danish young farmers share this opinion and do not count on European subsidies or would even like to completely abandon them. However, young farmers from almost all countries think it very important to receive support in the form of installation aid and training in order to help young farmers setting up their businesses. Ireland ranked installation aid as their number one priority and France underlined that the issue of young farmers' installation should be brought forward more often and highlighted in the discussion around agriculture in the future. Finland as well as Belgium considered the lack of predictability of Europe's agricultural policy as a barrier to achieving future objectives.

3.1 Belgium Young Farmers

For Young Farmers from **Groene Kring** in Flanders the most important key element that will characterize the European model of farming by 2015 is to ensure competitiveness of their sector and to develop quality products and production. They see new perspectives in a liberal world market if European agriculture can assure high quality production. Since safe food of high quality is often produced by small-scale family farming those farms need to receive special support. In a global world, Flemish farmers think it important that governments and institutions in the agricultural sector actively participate in international negotiations to strengthen the position of family agriculture. The instruments that can help reach these objectives are installation and investment aid (Rural Development Policy), training and advisory services. More possibilities to invest in innovation and developing new products are essential to survive. Food is still considered as a priority production by 2015, but the ways and means of producing must come more and more into the picture. Non-trade concerns like the protection of the environment, animal welfare, biodiversity and management of landscapes are of increasing importance. Flemish farmers are willing to carry out environmental and other services if they are paid for this. They need to be competitive in quality in order to survive in the future. "Competition in delivery and sales must be stimulated and protection of self-sufficient agriculture against international competition is necessary. Europe has to keep the European Model of Agriculture that is based on specific demands of the society and it needs to defend this on international level. The financing level of the Common Agriculture Policy must be guaranteed. No further modulations or national co-financing are accepted. A more liberal world market will create more instability. By keeping enough market mechanism available and by introducing new instruments as risk and crisis management, the European agriculture policy should take care of the increasing instability in a more free world market."

Walloon Young Farmers from the **FJA** have a rather pessimistic vision and seem to have many questions on the future of agriculture, mainly related to the CAP reform and the general uncertainty of the agricultural sector. They also feel that governmental institutions, the European Commission and the WTO are not really listening to farmers when taking their decisions. In order to get a more optimistic vision of the future it would therefore be necessary to take into account the opinions of people working in agriculture and especially the young generation. Young farmers from the Walloon region have sent us a special contribution on their views of the future of agriculture:

“Between agriculture and economical competition - where would young people’s place be?”

A special contribution by the FJA – Fédération des Jeunes Agriculteurs, Belgium

In consideration of the actual situation and the rather negative prediction it is not surprising that this question is important to all young farmers. As it is the case for all economical sectors, competition brings along falling production costs. But what does that mean? Many farmers here and in other places of the world will stop working in agriculture. Huge industrial farms will replace those in the hands of families. Regional, national and international competition between farmers will constantly increase.

Furthermore, falling prices will make it difficult for farmers to live from their production. WTO is in fact working on the abrogation of all protective regulations limiting free trade and therefore assuring decent price guaranties. International prices will then be implemented without considering local production costs.

A good example for what is actually happening is the dairy sector. Milk prices have fallen incredibly low in order to be competitive on the international market while production costs have risen and forced many dairy farmers to give up their professional activity. The whole sector has changed fundamentally and it is almost impossible for medium size dairy farmers to survive.

Competition as wanted by the WTO will cause the same effects in other agriculture sectors. The effects are even more dramatic as, while prices are falling, environmental protection, animal welfare and other rules creating further costs are implemented. It is certain that direct aid is compensation and should be considered as such, but it cannot make up for falling prices. And, as a matter of fact, who can tell us how long farmers will still be profiting from this aid?

The process of free trade and competition is working against the implication of sustainable agriculture policy. But it is exactly this sustainable policy that is needed by young - but also older - farmers. Infinite reforming of the CAP makes it difficult to even develop a medium-term vision of the future of European agriculture in general and particularly in Walloon.

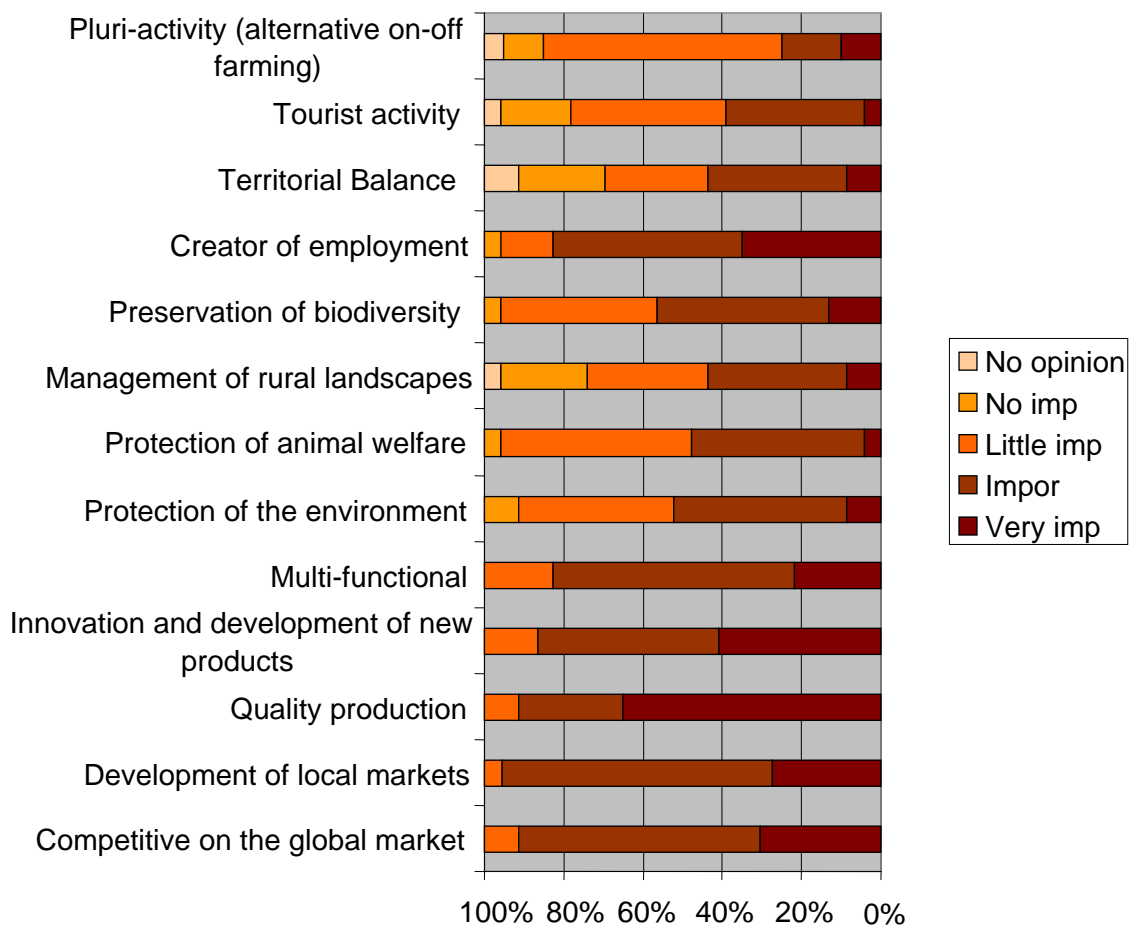
What shall young farmers make out of Commissioner Fischer Boel’s declarations that milk quotas are to be reduced, that farmers need to find a second job and that the budget will be radically reduced after 2013? Shall young farmers consider these declarations as definite or can the agricultural sector still evolve in a different direction?

More than ever, the farmer will have to respond to the consumer’s demands – as he is already doing. But the consumer should also be coherent in his choices and buy products from those farmers following the constraints he imposes. And public institutions should encourage the consumer in making these choices. But also make him understand that it is not a matter-of-course that he can eat until satisfaction, but a privilege. This is the reason why it is more than necessary to assure farmers’ future in our regions as this is assuring the delivery of sufficient food - in quality and quantity - to our people. Citizens of the European Union should not become as dependent on others for food as they are for energy.

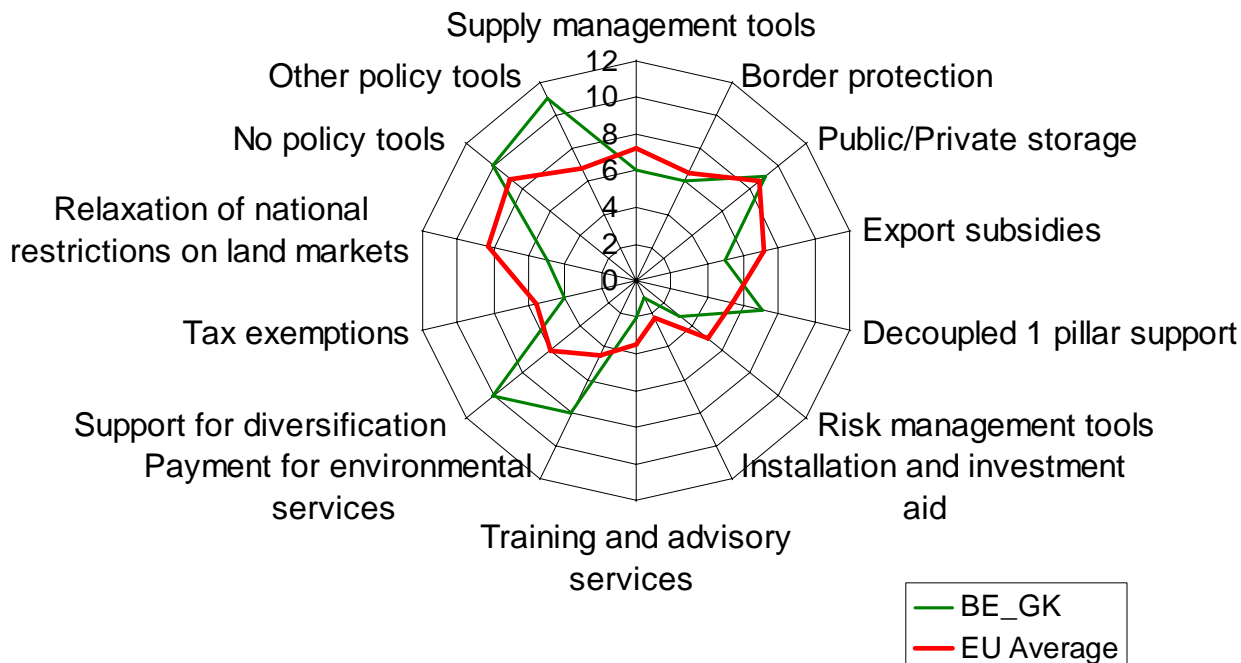
All the uncertainties and reforms make it complicated to decide on investments. Where shall young farmers orientate themselves? Issues that matter are still sustainability, profitability, quality, diversity and continued existence.

The future competitiveness of European agriculture will certainly depend on key tools such as investment aid, modernisation of farms and training. The new programme on rural development includes these notions but young farmers are afraid that European as well as national budgets will not be sufficient to achieve this goal. However, the future of our agriculture will largely depend on the support that the young generation receives in order to become real farm managers. Young farmers will therefore need politics that assure continuous training and exchanges of *savoir-faire*.”

Graph 4
Belgium: Key objectives identifying the European Model of Farming by 2015



Graph 5
Belgium: Key policy instruments for the Future Model
of Farming by 2015
 (1 = most important - 13 = least important)

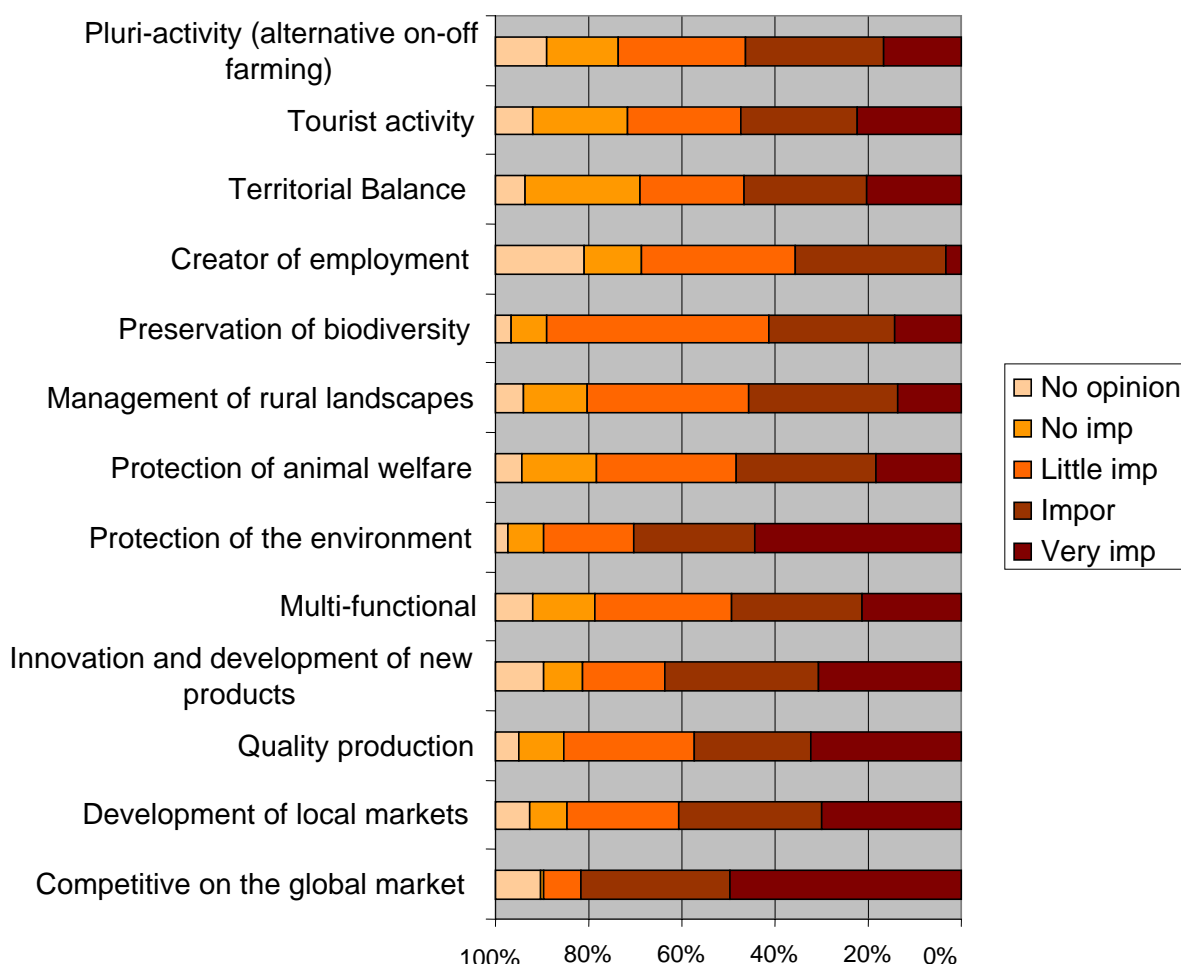


3.2 Czech Young Farmers

The Young Farmers organisation from the Czech Republic, **SMA CR**, identified as key objectives to stay competitive on the global market and protection of the environment, followed by quality production, innovation and development of new products and local markets. Czech young farmers also feel that border protection is very important. They do not think that policy tools are of great help because when defining the most important policy tools they rank “no policy tools” on second place. Payment for environmental services and decoupled one pillar support are nevertheless important to Czech young farmers. Food will remain their main activity after 2015 and most of them think they will stay competitive through the price of their products.

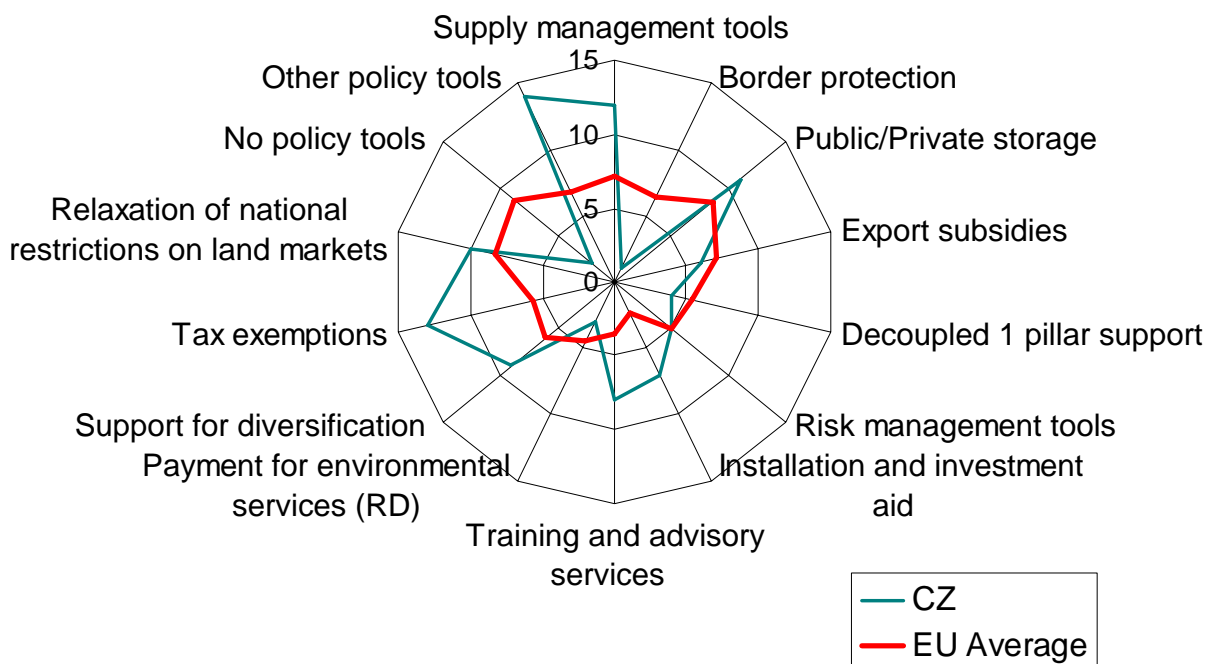
Question 1 results:

Graph 6
Czech Republic: Key objectives identifying the European Model of farming by 2015



Question 2 results:

Graph 7
Czech Republic: Key policy instruments for the Future
Model of Farming by 2015
 (1=most important - 13=least important)



3.3 Danish Young Farmers

The three most important objectives for Danish Young Farmers from **LandboUngdom** are quality production, animal welfare and protection of the environment. This result has not surprised LandboUngdom at all because it reflects the culture of Danish farmers as well as the strict legislation they have faced concerning these areas for many years. Young farmers would wish more innovation and product development in the farming sector and they would like to be more competitive on global markets.

LandboUngdom decided to add an answering possibility to the question on policy instruments that can help reaching the objectives identified in the first question, as in Denmark, special young farmer loans with State security exist. The three most important policy instruments in the survey are installation and investment aid, other kind of installation aid (Young Farmers loans) and relaxation of national restrictions on land markets. It does not surprise LandboUngdom that installation aid and young farmers loans are the most important policy instruments as young farmers are very interested in installation aid because a few years ago the subsidies for interest payments were reduced. The young farmers loans were received with great enthusiasm by young farmers, banks and other financial institutions. Relaxation of national restrictions on land markets is also related to Danish legislation because it once put strict rules on the quantity of land a person could own. In the meantime, these rules are not that strict anymore but young farmers certainly want no limits at all on how much land they can own. Since Denmark has been increasingly investing in environmental services over the last years, it is not surprising that young farmers chose those payments on fourth rank. This investment will be intensified with the upcoming "Waterframe" legislation that is supposed to reduce the impact of intensive farming. Danish young farmers also find tax exemptions very important in order to ensure better frame conditions in competition with countries which have a much lower tax level. Training and advisory services come right afterwards with Denmark being a country that is well known for its education in agriculture, including theoretical as well as practical training. It is possible to follow training courses where students receive *Skilled Farmer*, *Farm Manager* or *Agrar-economist* diplomas and even university level education for farming is provided. Since decoupled one pillar support is only ranked as number seven, young farmers apparently do not count too much on EU subsidies concerning their future existence. This can also be seen in other financial-linked EU issues that come only very late in the ranking. In fact, Danish young farmers would like all countries to reduce or stop the EU subsidies.

Young Danish farmers consider food as the most important agricultural product in 2015 as Denmark has a long history of food production with many high quality products that are well known all over the world. Denmark is also one of the countries with the strictest standards on food quality issues such as hygiene, traceability etc. Renewable energies do not have a great impact on Danish young farmers as the national government has not yet invested enough in areas such as bio-mass in order to raise great expectations for the future.

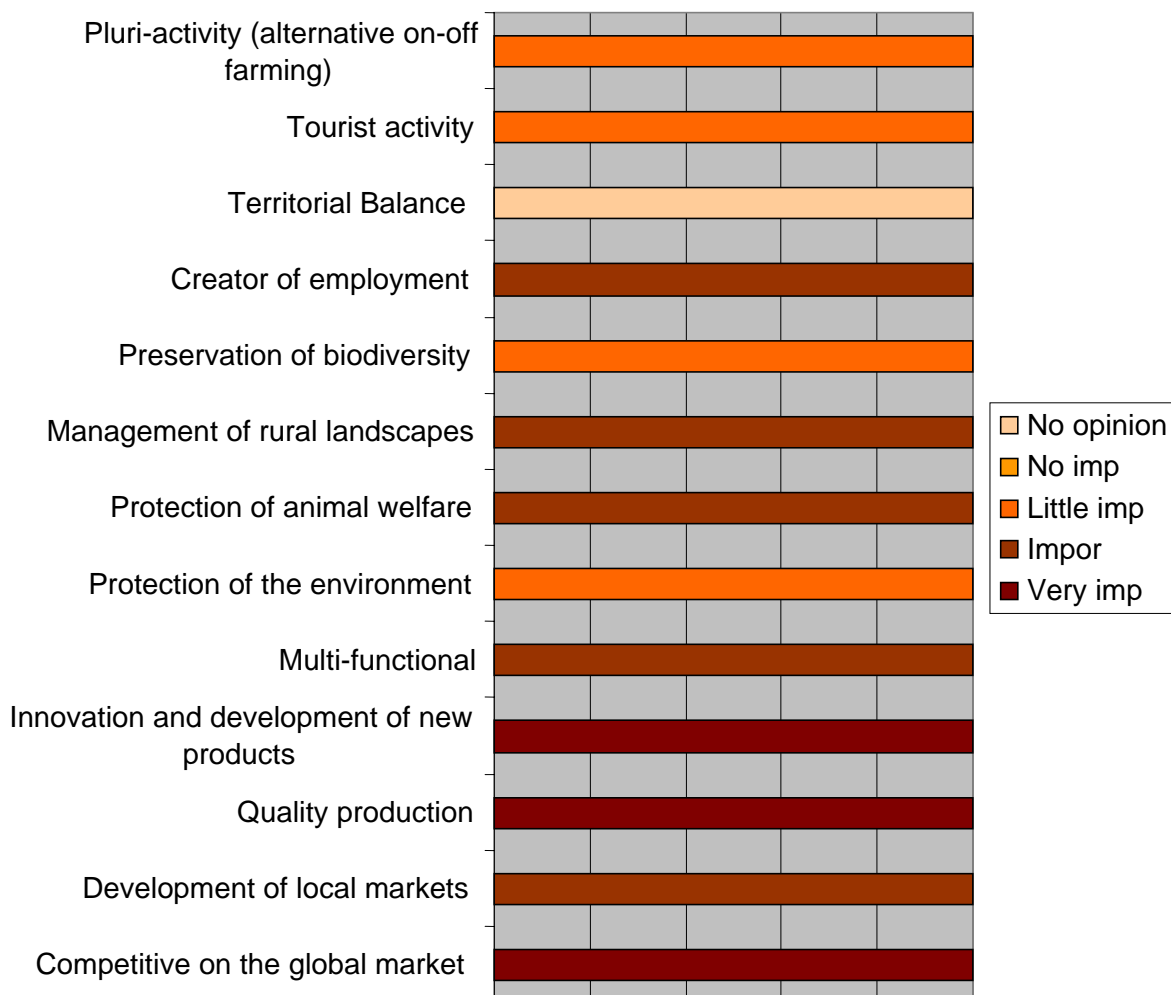
Comments on the question of how a EU farmer will survive increased competition in 2015 are closely related to question number three as young farmers in Denmark believe that high quality is the area where they can compete with farmers from other countries inside and outside the EU.

3.4 Dutch Young Farmers

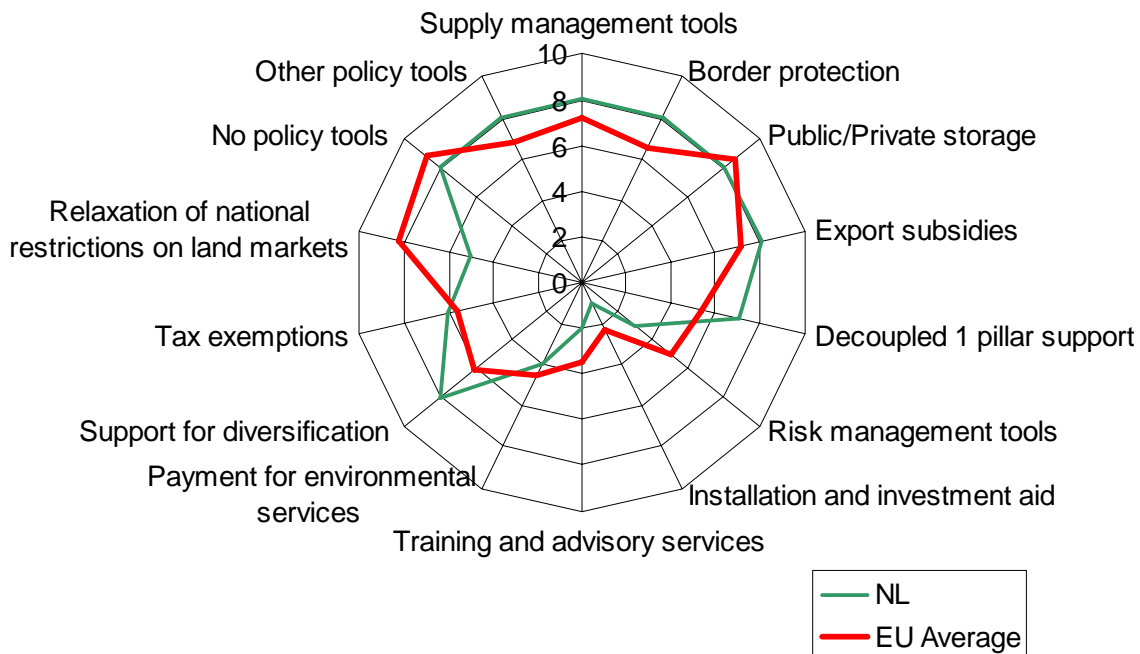
For Young Dutch Farmers of **NAJK**, the key objectives for a successful European model of farming by 2015 are competitiveness on global markets, quality production as well as innovation and development of new products. NAJK's young farmers judge half of the listed instruments in the questionnaire as very important: supply management tools, border protection, public and private storage, export subsidies, support for diversification, no policy tools and other policy tools all receive the highest rating. According to Dutch young farmers from NAJK, food will remain a priority in production by 2015. Dutch young farmers are convinced that they need to be competitive in quality if they want to survive in 2015.

Question 1 results:

Graph 8
Netherlands: Key objectives identifying the European Model of Farming by 2015



Graph 9
Netherlands: Key policy instruments for the
Future Model of Farming by 2015
 (1=most important - 13=least important)

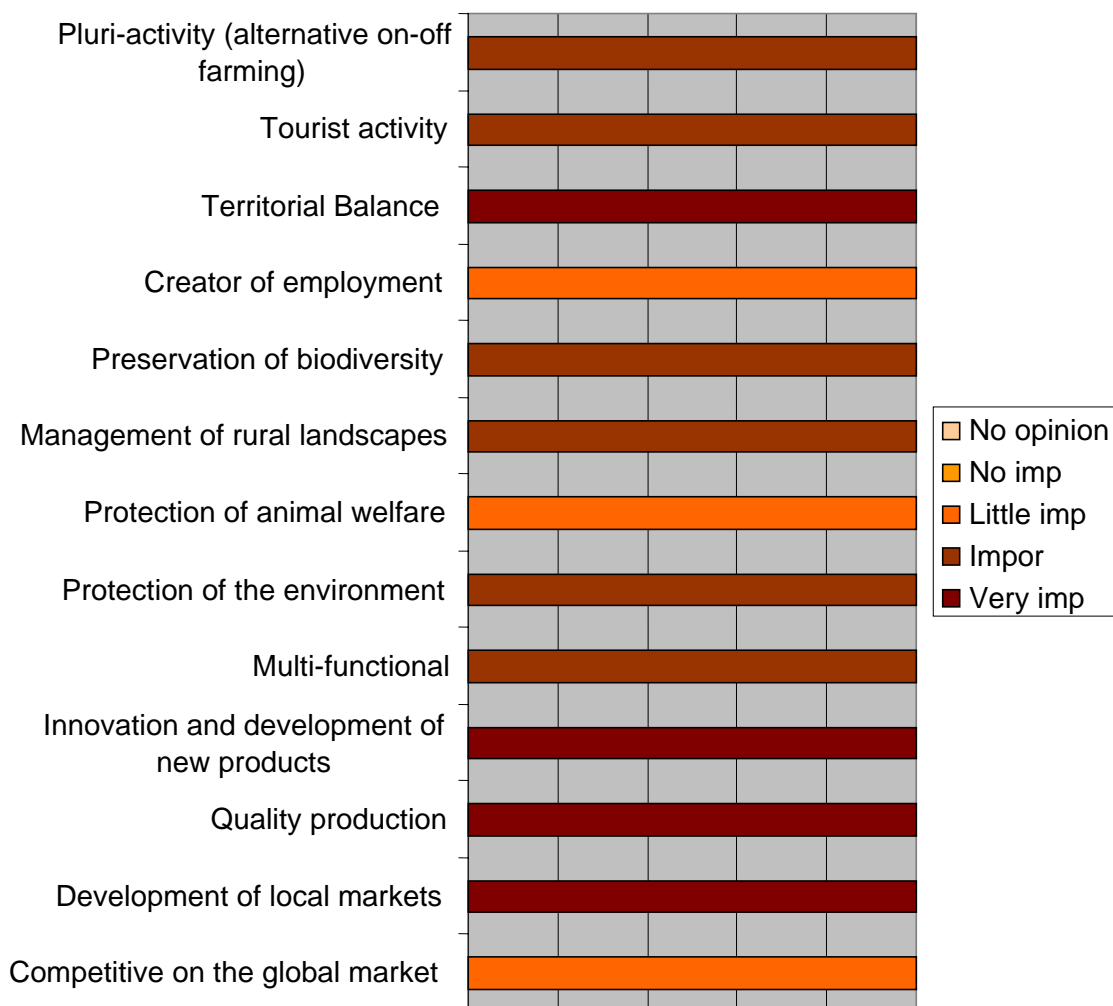


3.5 Estonian Young Farmers

For Estonian young farmers, the most important key elements that would characterize the European model of farming by 2015 are the development of local markets, quality production, innovation and development of new products as well as territorial balance. The instruments that can help reach these objectives are mainly tax exemptions and export subsidies, closely followed by relaxation of national restrictions on land markets. Border protection, decoupled one pillar support as well as installation and investment aid follow on the second rank. Interestingly, goods and services as well as non food seem more important to Estonian young farmers as a priority production by 2015 than food. Estonian farmers will survive in the future if they are competitive on price.

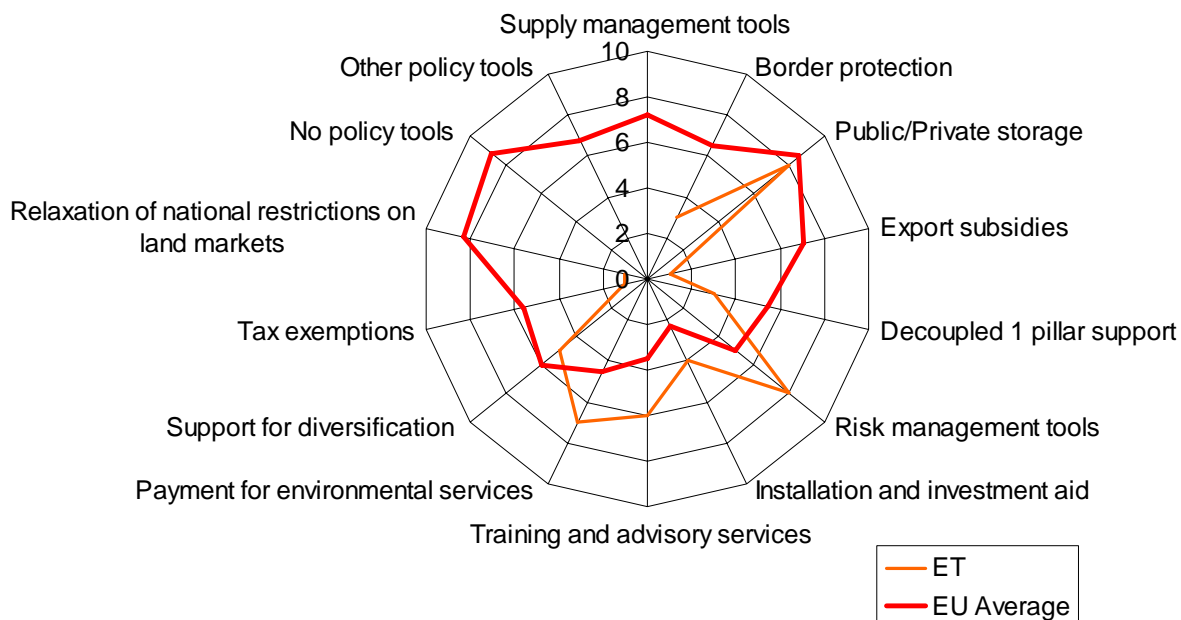
Question 1 result:

Graph 10
Estonia: Key objectives identifying the European Model of Farming by 2015



Graph 11 Estonia: Key policy instruments for the Future Model of Farming by 2015

(1=most important - 13=least important)



3.6 Finnish Young Farmers

Many of the key objectives proposed by the questionnaire are very important to Finnish young farmers. Almost all Finnish young farmers were unanimous that quality is a very important objective for the model of farming by 2015. Development of local markets, but also territorial balance and protection of animal welfare are considered as very important by them. High quality production should be kept up to compete in global markets but, at the same time, customers need better knowledge of their local markets in order to understand the value of their own production. Finnish production guarantees high quality and safe food. Tourist activity is not so important in Finland except for the northern Finland (Lapland). Finland is the most rural country in the EU and territorial balance is therefore probably more important than in other countries. This also means that agriculture is essential for keeping the countryside alive.

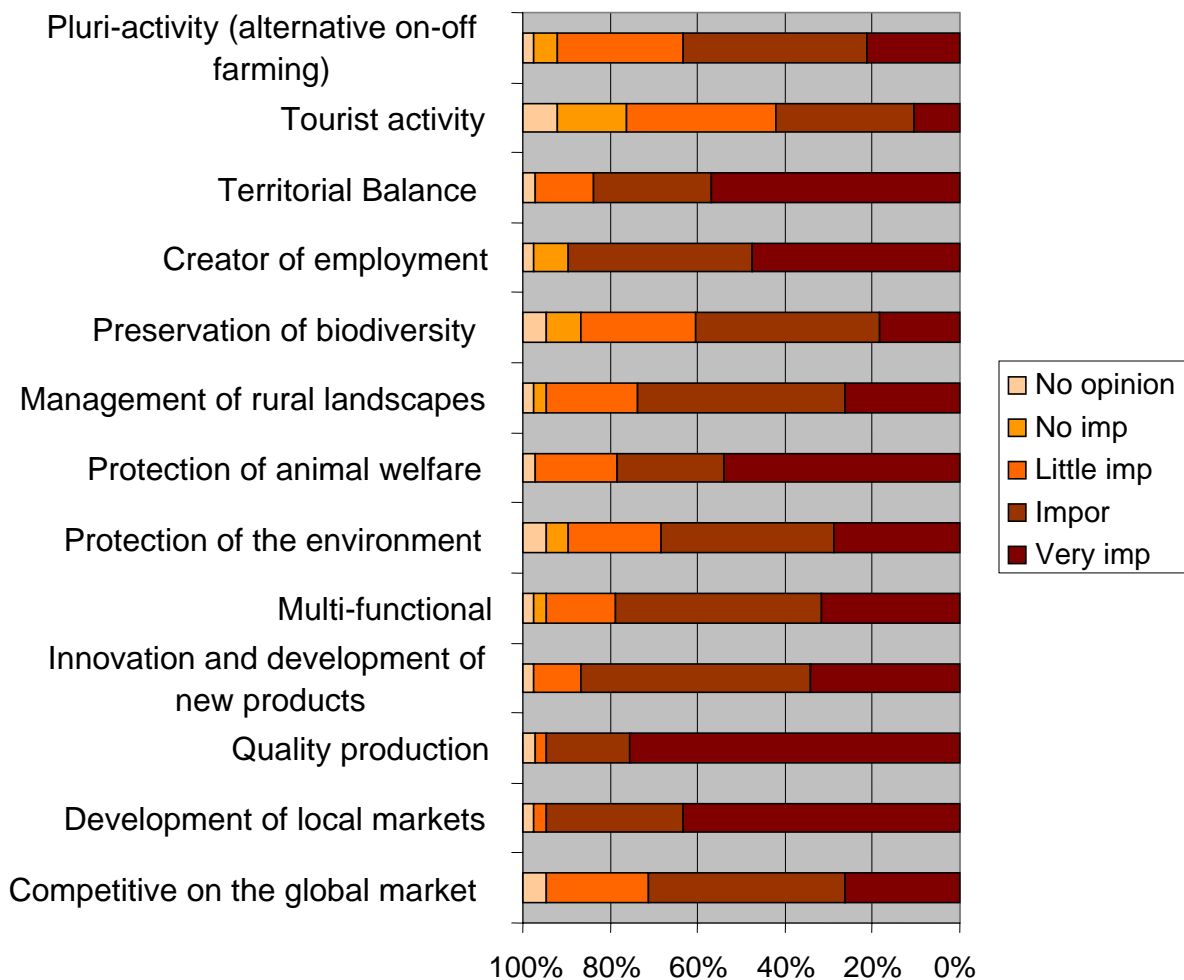
The Finnish young farmers think that the biggest problem of achieving these objectives is the lack of predictability of Europe's agricultural policy. Installation and investment aid were rated as the most important policy instrument in Finland as they are vital for ensuring that there will be young farmers in the future. Moreover, tax exemptions, especially when transferring a farm to a descendant, are identified as a key policy instrument. Other important policy instruments are supply management tools such as milk quota. Finnish young farmers also think that quality control systems should increase across the EU. In Finland farmers are voluntarily taking part in quality control and, in their eyes, quality could become a determining factor for financial aid. After all, supporting production is a sine qua non for agricultural production but Finnish farmers would like to have simplified agriculture policy.

Finnish young farmers are unanimous in the opinion that the most important agricultural product is food of good quality. But when efficiency of the production grows, and at same time the demand of products remains the same, some farmers might look for income elsewhere and that is why farm income is going to diversify.

Finnish young farmers think that the EU farmer will survive by ensuring competitiveness on quality. Least important was competitiveness on price, and between quality and price, was competitiveness through diversification of products. Question 2 was considered to be difficult to answer and therefore remains partially unanswered.

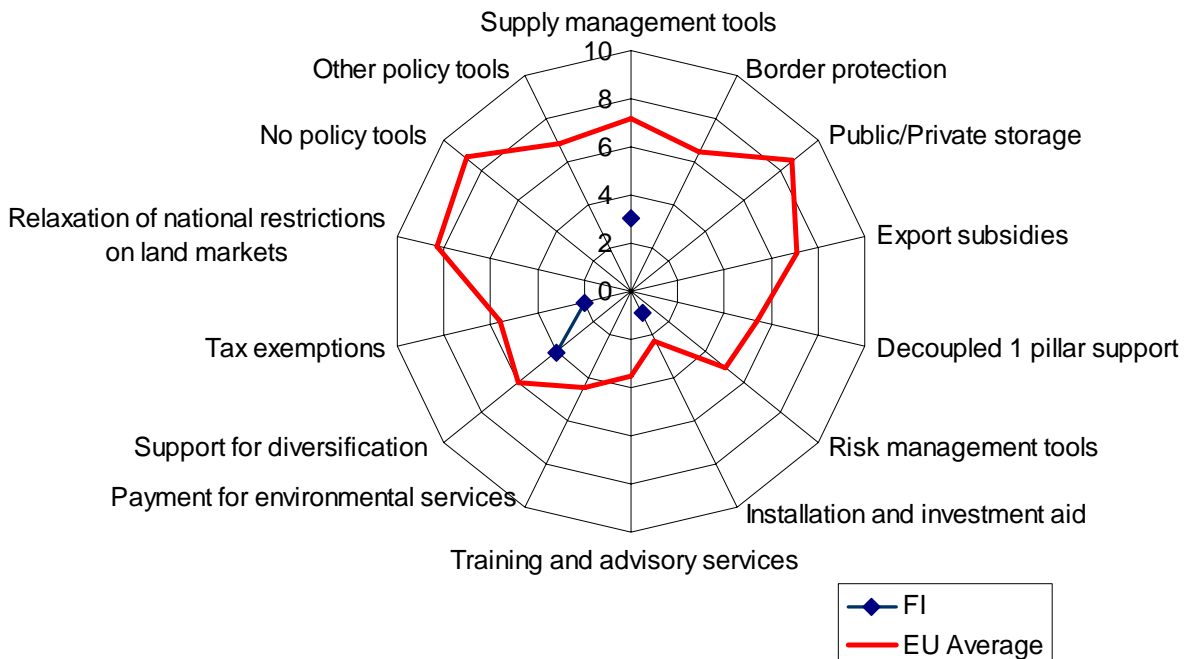
Question 1 results:

Graph 12
Finland: Key objectives identifying the European Model of Farming by 2015



Question 2 results:

Graph 13
Estonia: Key policy instruments for the Future Model of Farming by 2015 (1=most important - 13=least important)



3.7 French Young Farmers

“Define the objectives of our European Model of Agriculture first”

A special contribution from French Jeunes Agriculteurs

CEJA’s French member, **Jeunes Agriculteurs**, underlines that evaluating the future of agriculture in dividing sectors seems difficult as they think that only a combination of all elements mentioned in the question relating to the “key objectives identifying the future model of farming’ describes a successful future approach of farming. Indeed, in French young farmers’ visions all possible answers are very important and cannot be seen independently from one another, but are to be taken as a set of measures.

In respect to the question of key policy instruments, French young farmers consider that tools for a successful future of agriculture cannot be chosen if the European Commission does not, first of all, define objectives to be reached by 2015, for agriculture and its farmers. In their opinion, it would be more logic to define a European project and decide on the necessary policies responding to current challenges (food and non-food, environmental challenges, economic and social challenges ...) in the first place. Only after this first step, it seems right to Jeunes Agriculteurs to make use of the corresponding measures because agriculture policy is not mainly defined by the tools to be used but by its objectives.

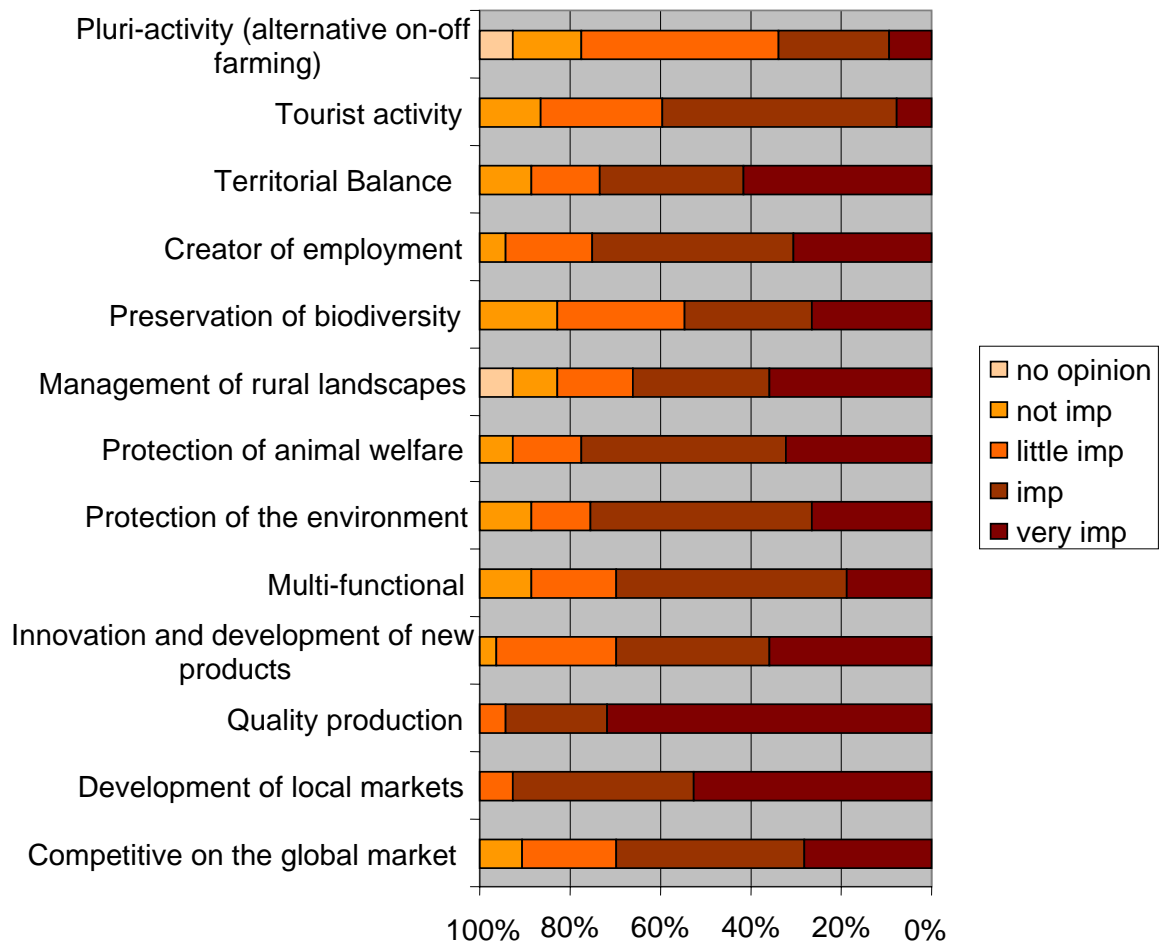
Furthermore, Jeunes Agriculteurs would like to see much more emphasis on and discussion about the setting up of young farmers’ businesses. “

3.8 German Young Farmers

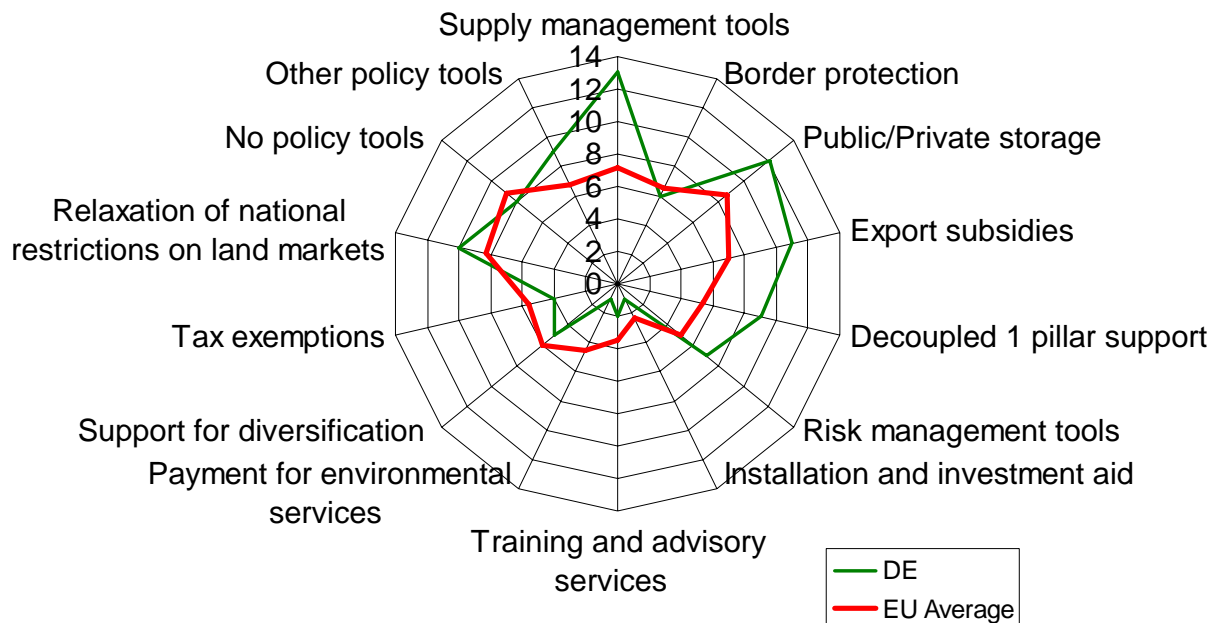
The German organisation **BDL** conducted their survey amongst their members in autumn 2006. The results of the survey show that young farmers in Germany consider some aspects as crucial for the future of the European agricultural sector:

Since German and European Consumers tend more and more to favour food of higher quality which is safe, wholesome and tasty, food quality and food safety are of fundamental importance to young farmers in Germany – nowadays as well as in the future. Food quality is closely linked to the aspect of animal welfare and environmental protection. According to young German farmers it will be of great importance to produce and process food in accordance with good farming practices, paying greater attention to the environment and animal welfare. Moreover, they consider it to be significant to develop and support regional agricultural markets and to strengthen the countryside in order to keep young people in rural areas. For translation of their vision into action, young farmers propose to maintain investment support. They also underline the significance of payments for environmental commitments as well as the aspect of good training and advisory service. An increasingly knowledge-based society and a dynamic agricultural sector require that young farmers have an appropriate level of training and the ability to continuously increase their level of knowledge. For German young farmers, these are the political key measures to realize the targets of their vision. To build up a competitive agricultural sector in 2015, young farmers in Germany expect from the responsible policy makers that they support services such as training, extension, research and rural infrastructure. Besides, young farmers request appropriate agricultural policies and strategies, but do not place great importance on political instruments, which regulate the production volume such as production quotas. The farmers prefer to have the freedom to produce what the market wants. The participants of the survey suppose that in 2015 farmers in Europe will mainly produce food products to survive on the agricultural world market followed by non food products and other goods and services. Stiffer global competition combined with higher productivity will result in a further drop in real prices for most basic food commodities. To stand this competition on global markets, young German farmers consider it to be important to produce high quality goods and to diversify agricultural activities.

Graph 14
Germany: Key objectives identifying the European Model of Farming by 2015



Graph 15
Germany: Key policy instruments for the Future Model of Farming by 2015 (1=most important - 13=least important)



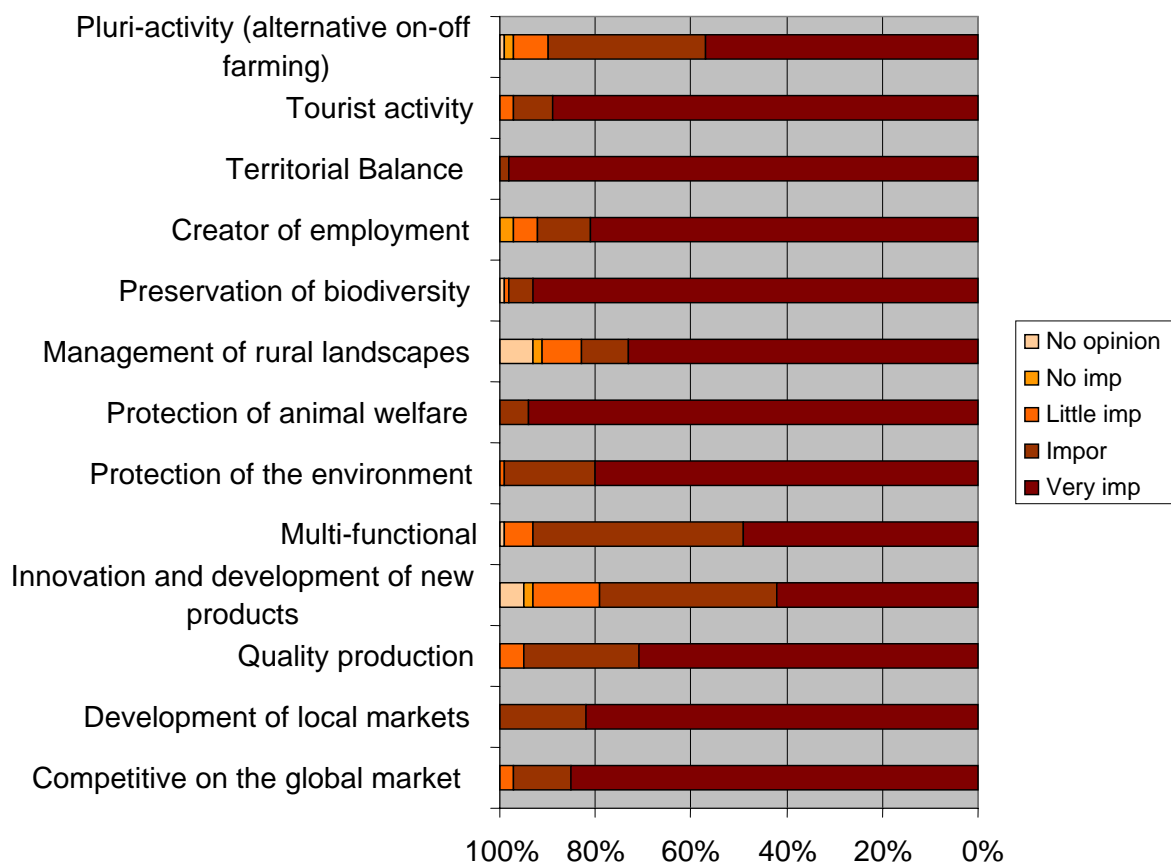
3.9 Greek Young Farmers

Young farmers from **GESASE**, the Panhellenic Federation of Young Farmer's Organisations, consider the key objectives of European farming by 2015 to be territorial balance and keeping people on the land as well as animal welfare and preservation of biodiversity. Tourism activities as well as competitiveness on the global market are also seen as very important by most of the young farmers. They rate policy tools as the key instrument to achieve these objectives but insist on the fact that subsidies should go to the real farmers and not to part-time farmers, land owners or the food industry. Decoupled one pillar support is following in their ranking, but training and advisory services are also very important to Greek young farmers. Next to installation and investment aid they put strong emphasis on the need for risk management tools in order to feel safe and to be covered, at least from all consequences of the devastating climate change.

More than two thirds of Greek young farmers believe food products to remain the most important area of agricultural business in 2015 and most of the others consider non-food products such as renewable energy as the main production area. Nevertheless, most of the young people answering the questionnaire think it important to invest in diversification of products in order to stay competitive in the future.

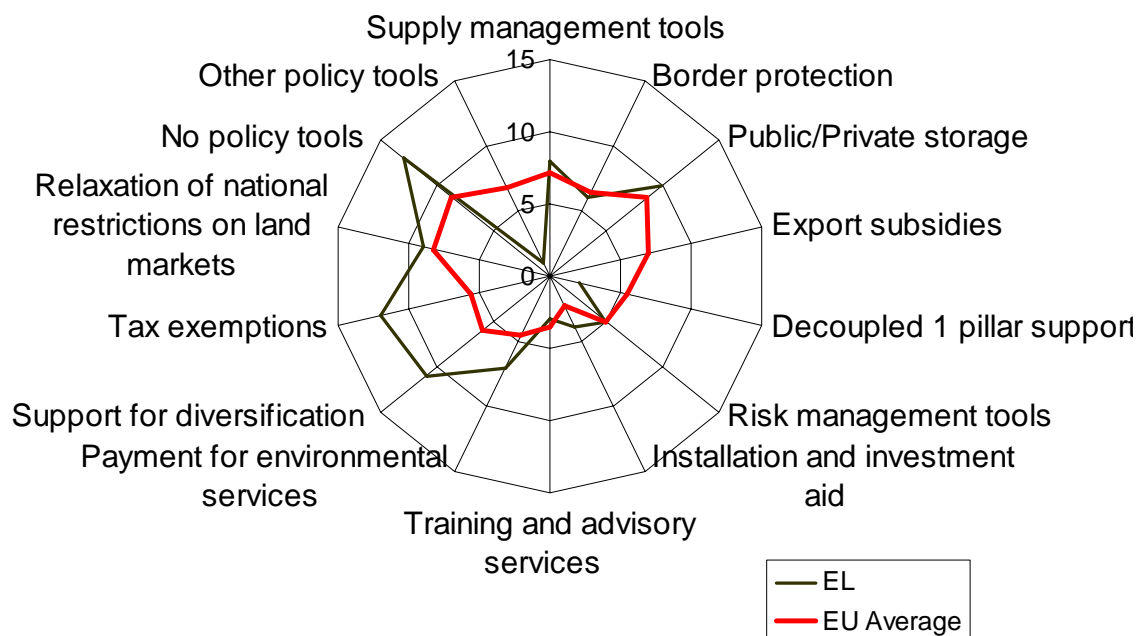
Question 1 results:

Graph 16
Greece: Key Objectives identifying the European Model of Farming by 2015



Question 2 results:

Graph 17
Greece: Key policy instruments for the Future
Model of Farming by 2015
 (1=most important - 13=least important)



3.10 Hungarian Young Farmers

Answers that young farmers from the Hungarian Young Farmers organisation AGRYA have given to the first question reflect their assumption that farming has changed considerably after Hungary's EU accession in 2004.

Farmers are divided according to market trends: Those working on larger territory (over 100 ha) consider global competitiveness a more important factor, while those cultivating smaller farms (below 50 ha) have a priority in multi-functionality. Both groups were particularly fond of local markets besides global ones, since they can contribute to protection of local traditions and the environment. Considering protection of the environment, rural landscape, biodiversity, territorial cohesion and diverse farming priorities into future models of farming was very important for both groups. Less importance was given to animal welfare, employment and tourism, while hobby farming was not considered important at all.

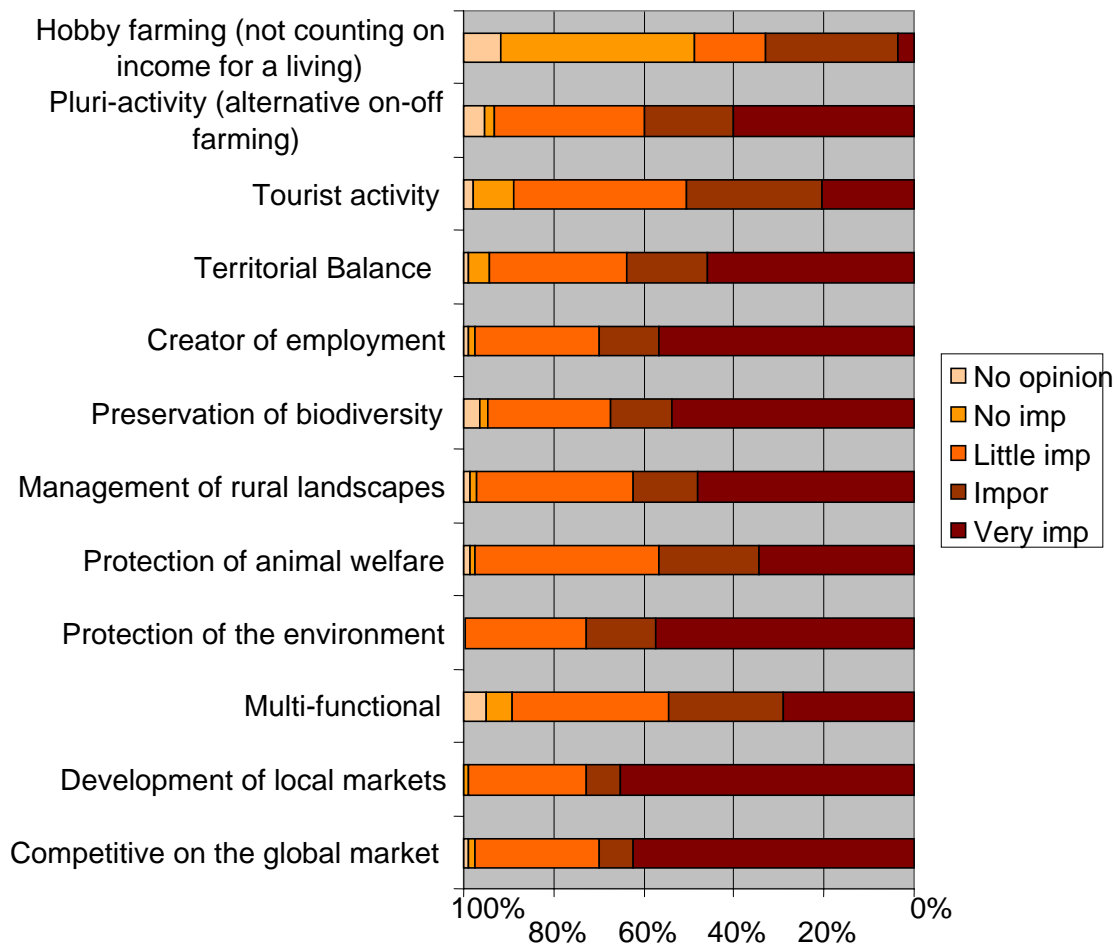
Analysing the answers shows that farmers believe in a future agricultural model which establishes a multi-functional economy that is competitive, even in global context, and produces high-quality products with respect to environmental surroundings and traditions.

In order to establish such a model, almost all young farmers considered four elements equally important: establishing quotas and supply regulators, production-independent regulators, rural development policy and export subsidies.

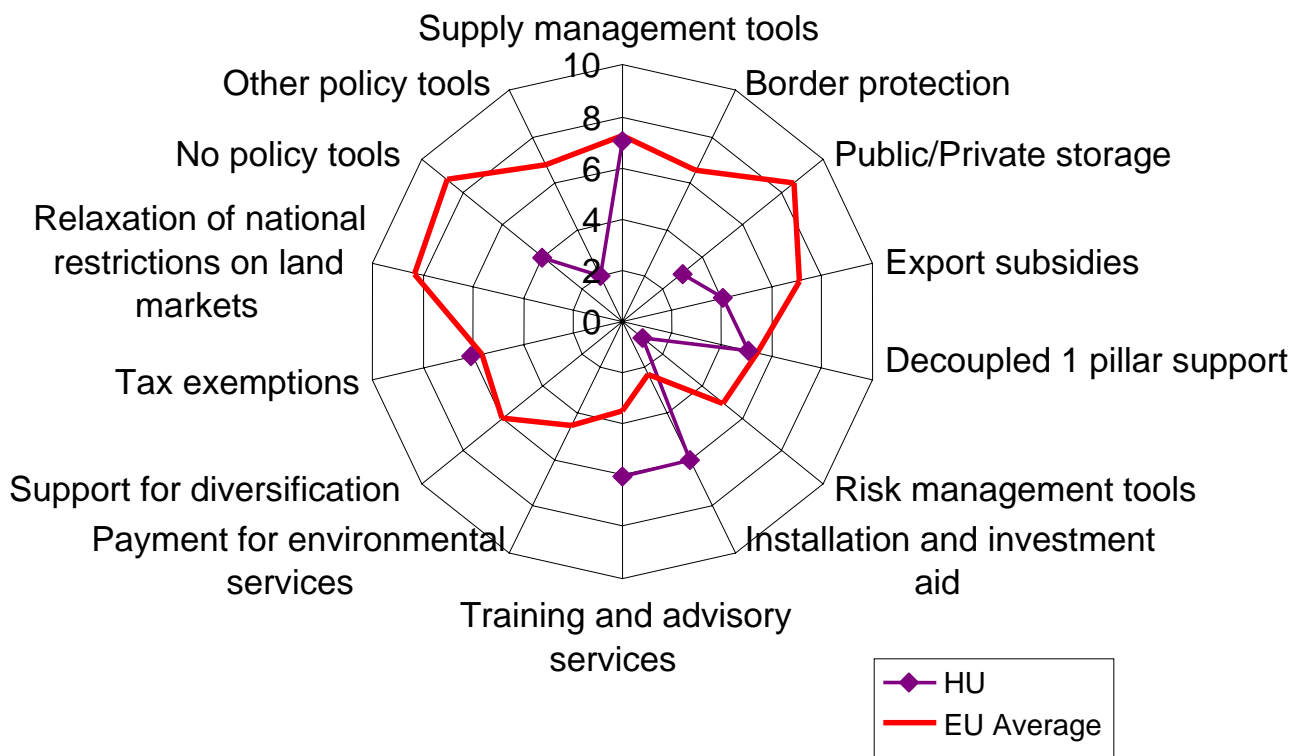
Most Hungarian young farmers consider simultaneous production of food and non-food production as their future activity, while more than two thirds believe in competitive prices and a larger product range.

Question 1 results:

Graph 18
Hungaria: Key objectives identifying the European Model of Farming by 2015



Graph 19
Hungaria: Key policy instruments for the Future Model of Farming by 2015 (1=most important - 13=least important)



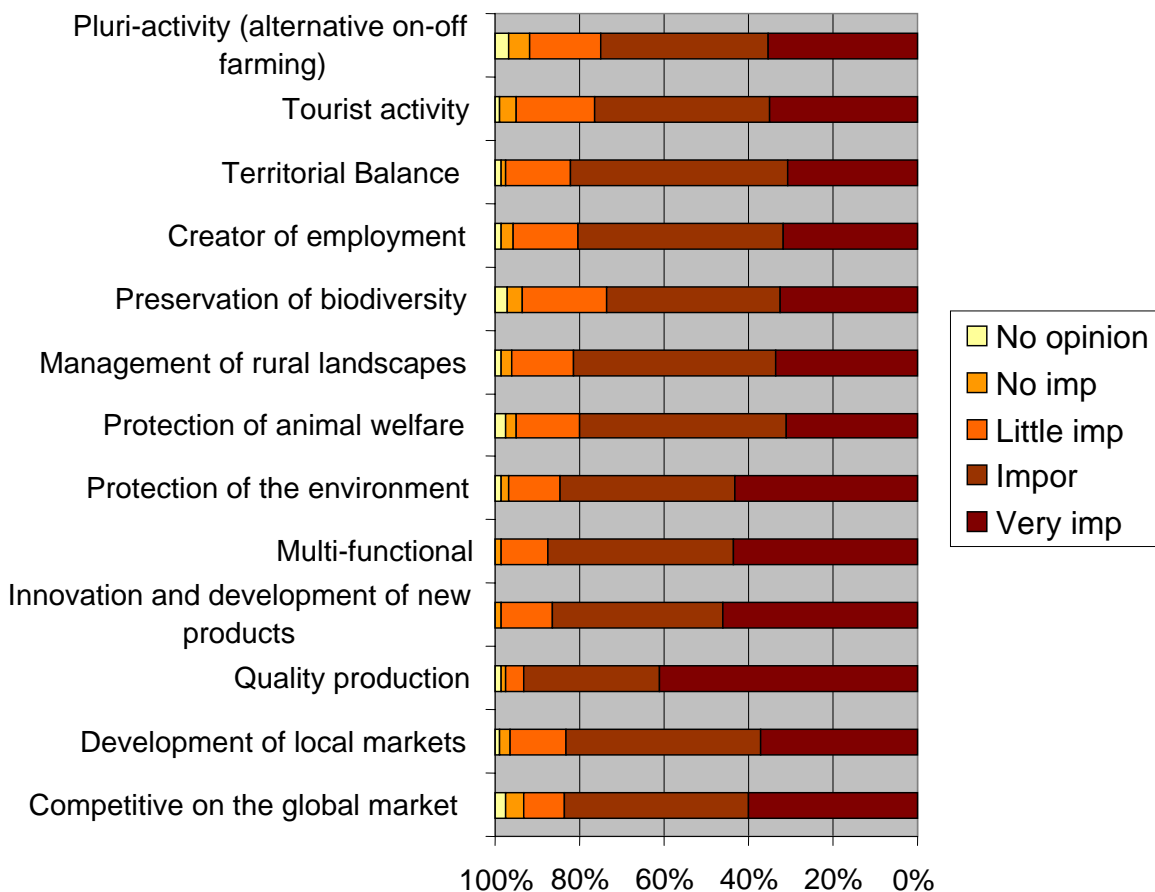
3.11 Italian Young Farmers

For **Coldiretti** the two most important objectives which should characterize the European model of farming by 2015 are on the one hand ensuring competitiveness of agri-enterprises, particularly in the development of quality products and production methods. On the other hand, they attribute great importance to territorial balance (built around the strong relationship between agri-enterprises and their territories) and sustainability. Italian young farmers felt that all instruments that can help reach these objectives are important, but the most important is rural development policy and especially installation and investment aid, linked to a “package” of measures built around the exigencies of the young agri-enterprises, which are more and more interested in producing quality food, but also developing innovative environmental and social services. Furthermore, young farmers from Coldiretti are strongly interested in a new approach concerning training that is paying attention to entrepreneurial skills and knowledge. In other words, all tools aiming at promoting an innovative and competitive multifunctional farming are welcomed by the young agri-entrepreneurs of Coldiretti. Food is seen as the priority of production in 2015 but Italian young farmers think that agri-entrepreneurship and food production will only be possible in the future if they are competitive in quality on local and global markets. This can be reached through the application of clear and effective rules governing agricultural markets in the world. The first and most important rule consists of recognition of the value added for territorial productions. That is why Coldiretti pays strong attention to the question of mandatory indication of local origin on food labels: it is a matter of transparency towards consumers and of respecting quality farming.

For young farmers of **AGIA**, the most important objectives for a successful European model of farming by 2015 are competitiveness in the development of quality products and production as well as innovation. AGIA is convinced that installation and investment aid is the most important policy tool for achieving these objectives in the future. According to Italian young farmers from AGIA, both food and other goods are seen as a priority production by 2015. Young Italian farmers are convinced that they will only be able to survive if they are competitive in quality.

For young farmers of **ANGA** the most important objectives which should characterize a successful model of agriculture are a mix of territorial balance and competitiveness in the development of quality products and production, as well as innovation. ANGA’s young farmers are also convinced that installation and investment aid is important. According to ANGA, the production of other goods and services will be a priority by 2015 but they also judge food and non food as very important. ANGA is convinced that, in the future, it is important to be competitive through diversification of products as well as being competitive in quality.

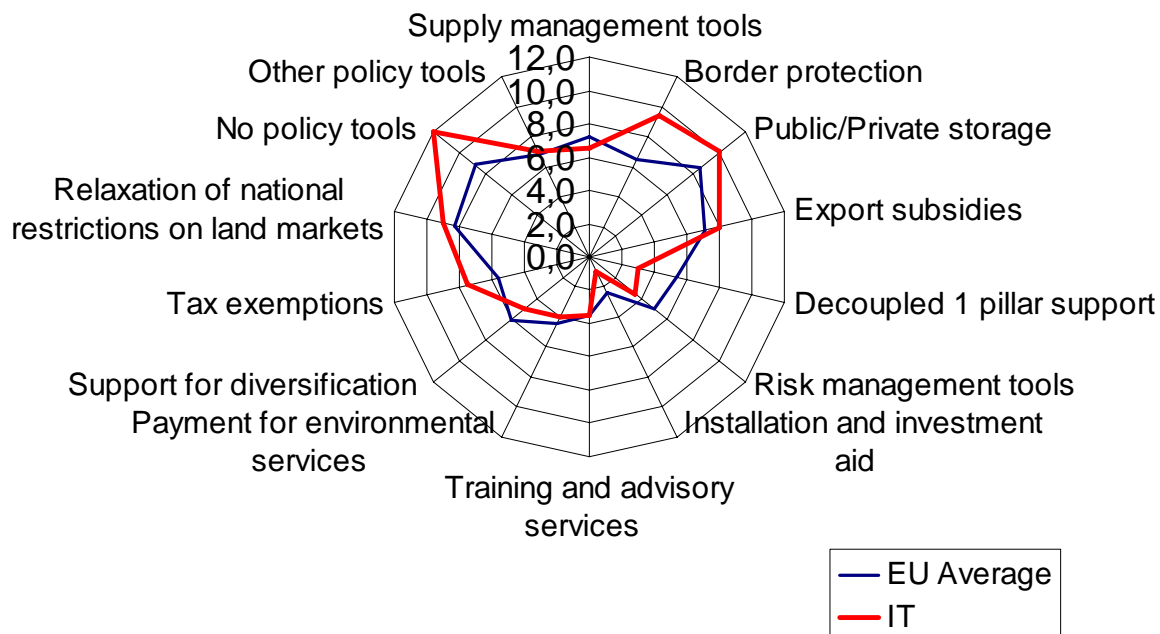
Graph 20
Italy: Key objectives identifying the European Model of Farming by 2015



Question 2 results:

Graph 20

Italy: Key policy instruments for the future model of Farming by 2015 (1=most important - 13=least important)



3.12 Irish Young Farmers

The Irish Young Farmers organisation **Macra Na Feirme** provided very detailed information on their national situation accompanied by the corresponding statistics as a response to the CEJA survey:

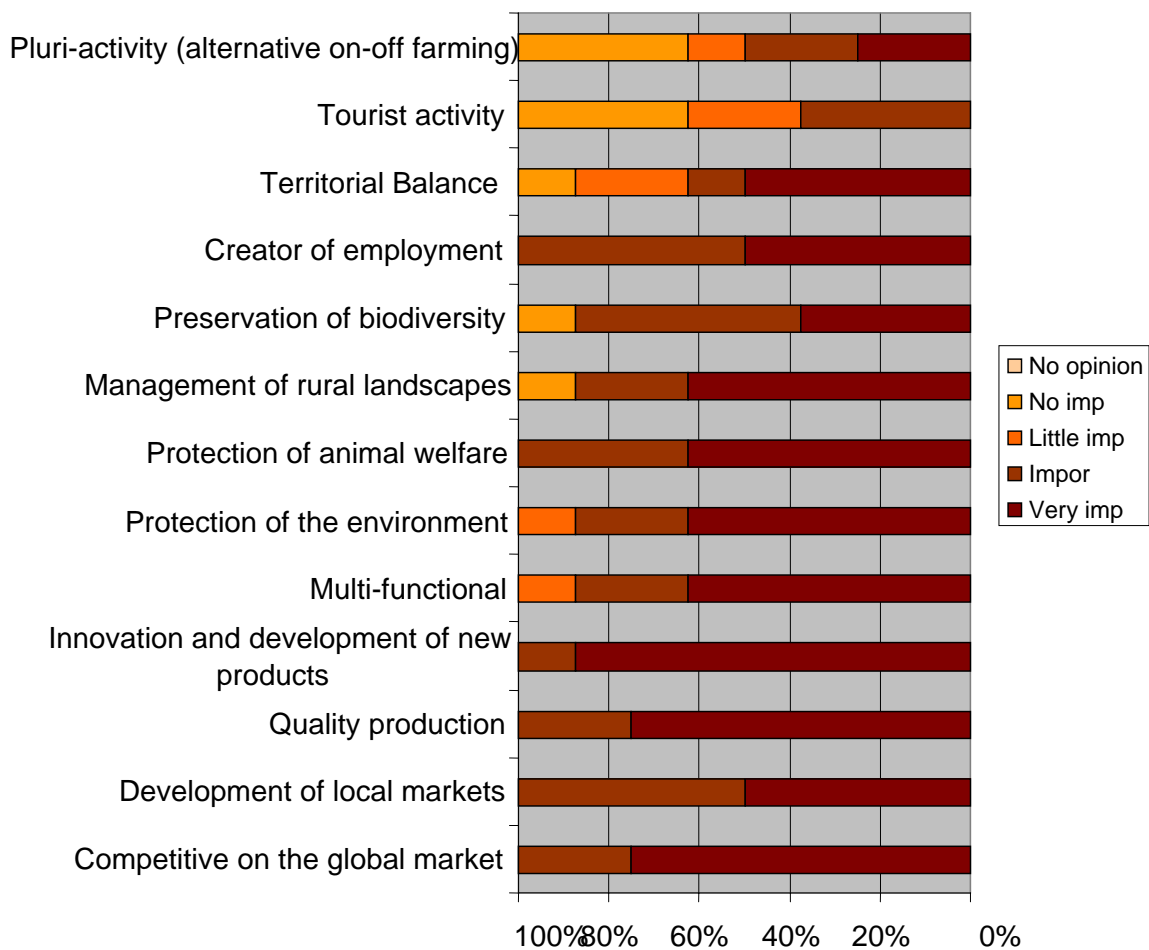
Ireland is a relatively small country with a land area of 6.9 million hectares of which 4.3 million is used for agriculture. The country has approximately 135,000 farm holdings with an average farm size of 32 hectares. Approximately 80% or 3.4 million hectares of the agricultural area is grassland, 10% rough grazing (mountain area) and 10% crop production. Only 11% of farmers are under the age of 35 and the need for installation and investment aid is rated as the number one key policy instrument in the questionnaire. According to the National Farm Survey produced by Teagasc, the Irish semi state research centre, advisory and training organisations estimate that on 55% of farms the holder and/or spouse have an off-farm job. On 81% of farms either farmer or spouse had some source of off-farm income from employment, pension or social welfare.

According to figures from the Department of Agriculture, Ireland has 6.2 million head of cattle, 4.2 million head of sheep and 1.6 million head of pigs. Ireland is 820% self sufficient in beef, 1042% in butter, 958% in milk powder, 436% in cheese and 303% in sheep meat. According to the Central Statistics Office, in 2005 primary agriculture accounted for approximately 5.2% of exports while the agri-food sector accounted for 8.5% of exports. Total agri-food and drinks exports were valued at €7.5bn in 2005. The country is therefore very dependent on the innovation and development of new products and a competitive global market as the results of the first question indicate. Quality production and animal welfare are also important factors together with protection of the environment and landscapes which are in tune with Irelands green image. The Irish Food Board Bord Bia brand Ireland as *"the food island."*

Young farmers believe training and advisory services are important and Macra na Feirme, the Young Farmers organisation in Ireland, strongly promotes education and training as an important instrument for the development of the agricultural sector. Taxation is also identified as an important policy tool as many Irish farms are fragmented in nature, land prices are very high in the country and returns from farming are under pressure. Farmers express the need for the introduction of measures such as reinvestment relief where a farmer can invest the proceeds from a capital sale in farmland or other assets to expand or improve the efficiency of his or her commercial holding. Stamp duty relief and stock relief are also viewed as important measures. Also payment for environment services features as important with Irelands green image.

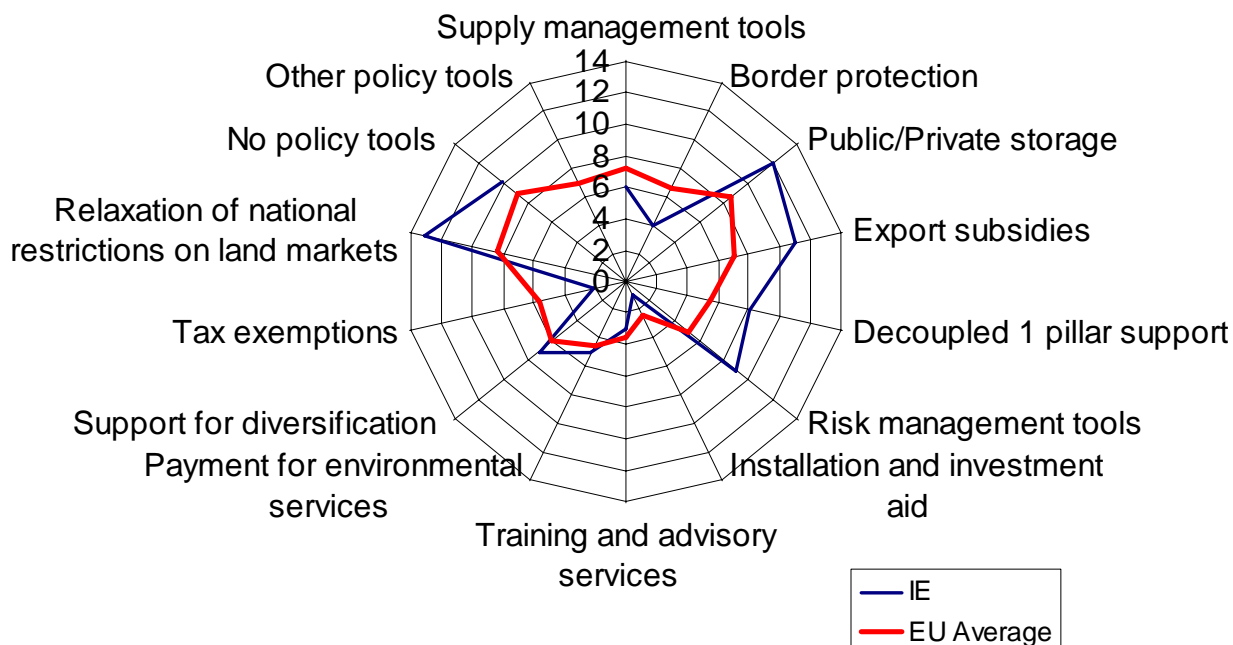
Question 1 results:

Graph 22
Ireland: Key objectives identifying the European Model of Farming by 2015



Question 2 results:

Graph 23
Ireland: Key policy instruments for the Future Model of Farming by 2015 (1=most important - 13=least important)



3.13 Luxemburg Young Farmers

For young farmers from Luxemburg's organisation **Centrale Paysanne - Lëtzebuenger Bauerejugend** key objectives for the European model of farming by 2015 are the development of local markets, quality production, innovation and the development of new products, multi-functionality, management of rural landscapes and preservation of biodiversity. The most important policy instrument to reach these objectives is payment for environmental services and for rural development, especially in less advantageous areas with natural handicaps. These instruments are closely followed by decoupled one pillar support, installation and investment aid as well as training. Centrale Paysanne - Lëtzebuenger Bauerejugend summarized the outcome of their survey as follows:

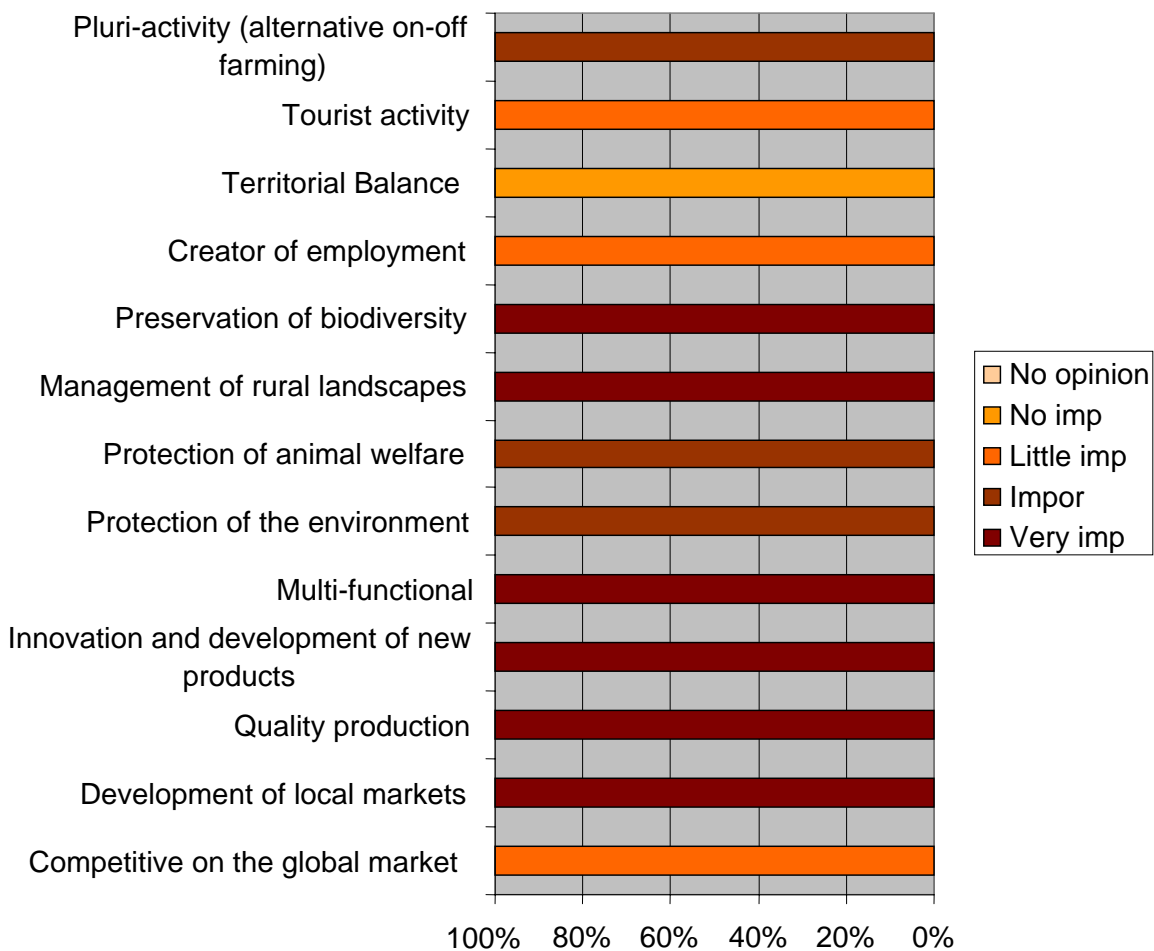
"Realising our vision of a young, dynamic and competitive agriculture means:

- producing quality food as well as healthy and safe products
- trying to satisfy the consumer with our products
- producing regional food on farms run by families
- being able to compete with local products in a global world
- having a strong rural development policy
- beating natural handicaps with intelligence and innovation
- practicing multi-functionality and a good balance between food and non-food production
- diversifying production and establishing a good balance between producing goods and providing environmental and social services
- training and informing young farmers"

Luxemburg's young farmers will continue to produce mainly food. In their eyes, the EU farmer needs to be competitive on quality in order to survive.

Question 1 results:

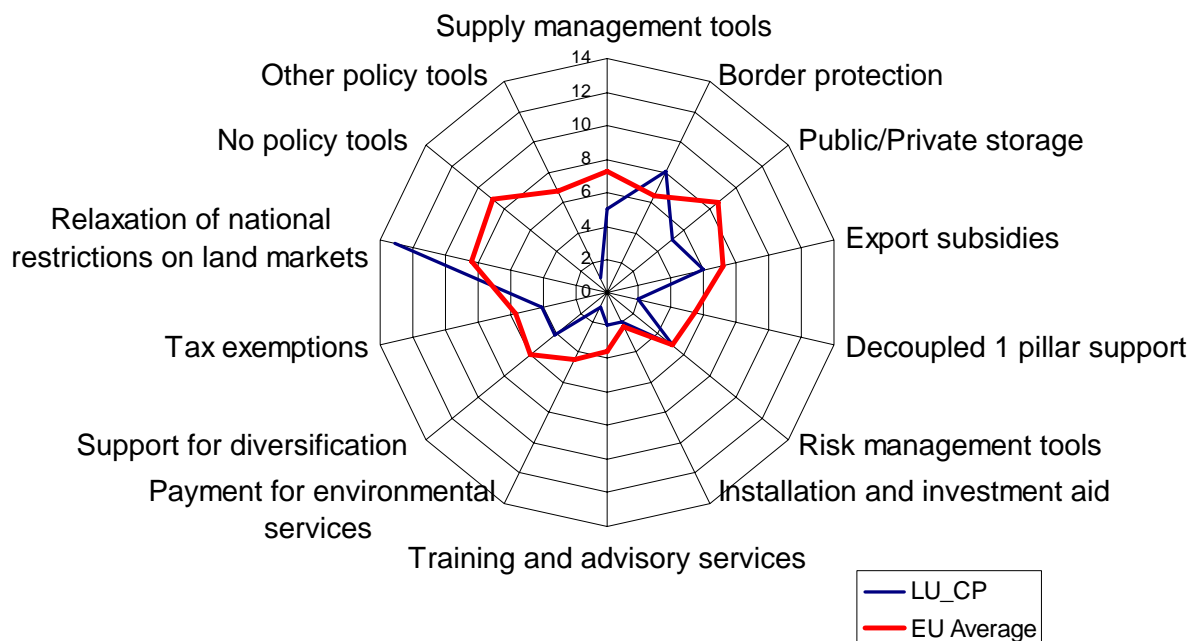
Graph 24
Luxemburg: Key objectives identifying the European Model of Farming by 2015



Graph 25

Luxemburg: Key policy instruments for the Future Model of Farming by 2015

(1=most important - 13=least important)



3.14 Portuguese Young Farmers

Young farmers from the Portuguese organisation **AJAP** showed great interest in the questionnaire. In general, Portuguese young farmers ranked all of the 13 objectives suggested by CEJA as important and very important. The most important one for them is quality production and the less important is tourism. This shows that Portuguese young farmers are in favour of a competitive and sustainable agricultural sector which is market orientated, assures food safety of a high standard and respects the environment. Multi-functionality and diversification are also very important as farmers have many different functions ranging from food production to countryside management, nature conservation, and keeping cultural traditions.

The agricultural sector may be assisted by Community financial support under rural development measures, such as tourism, but this should not become the driving force of income for farmers.

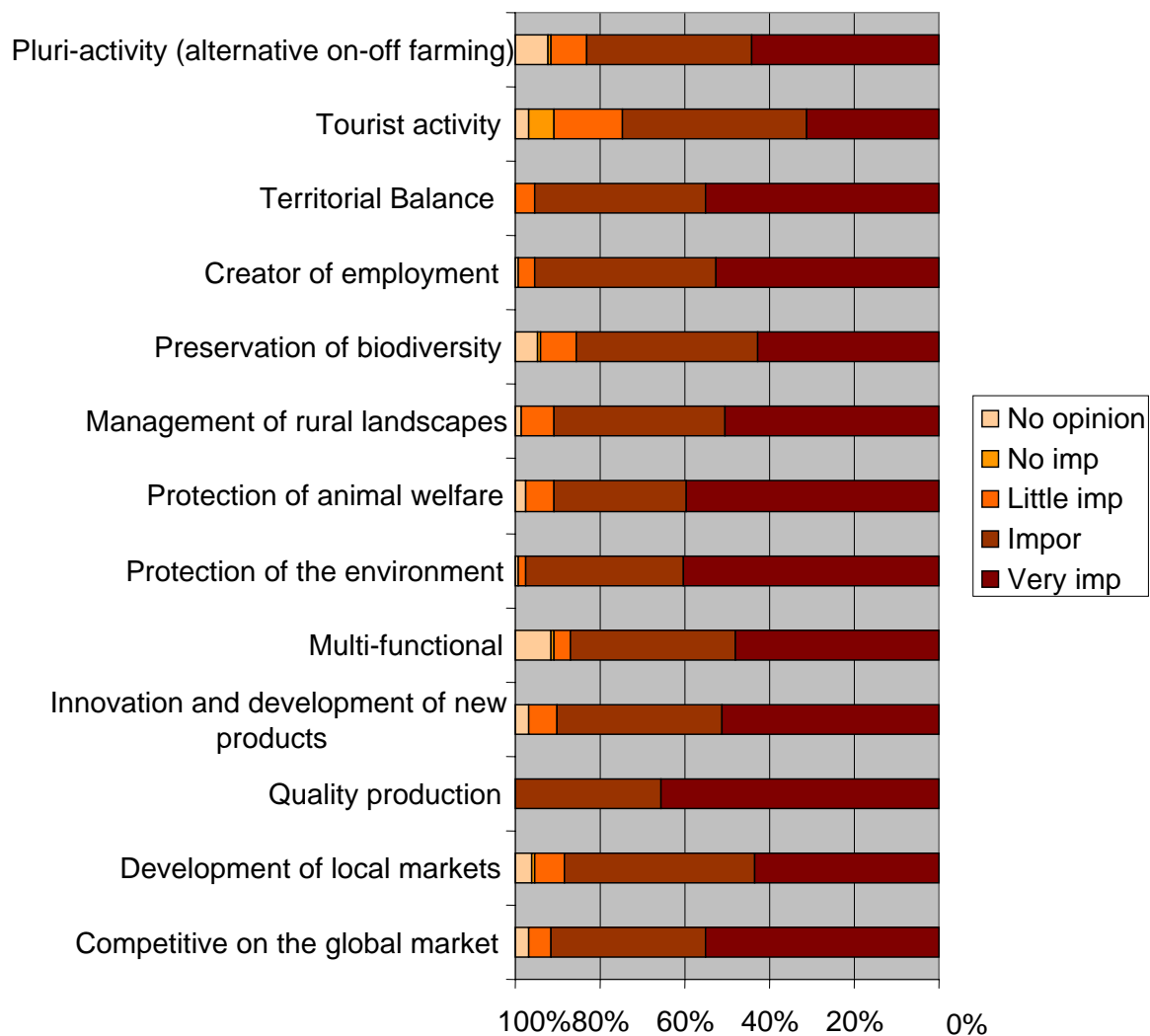
To achieve the objectives mentioned under question number one, Portuguese farmers consider risk management tools as well as installation and investment aid as the most important policy instruments to be adopted by the EU. Certain risk management tools are seen as effective economic tools for maintaining price stability and guaranteeing food security and farm income. An appropriate EU financial installation and investment aid will allow the setting-up of more young farmers and the consecutive modernisation of European agriculture. Young farmers need market stability and investment support to modernise their agricultural holdings and respond to consumers needs. On the other hand, if there is no support from the EU, farmers are not able to cope with the increasing market pressure and will neither be able to deliver the social, environmental and cultural demands of the EU citizens. Farming is a complex business demanding management skills and continuous updating of knowledge that can only be achieved through intensive and appropriate training.

Portuguese young farmers think they will continue to produce mainly food.

Structural and economic dimensions of Portuguese farm holdings have increased over the last decades, revealing a tendency to approach the EU average. However, the geography, social structure and culture of each country will always play a vital role on the characteristics of its farming sector which should be respected and maintained. The production of high quality products is not necessarily linked to the dimension of the farm.

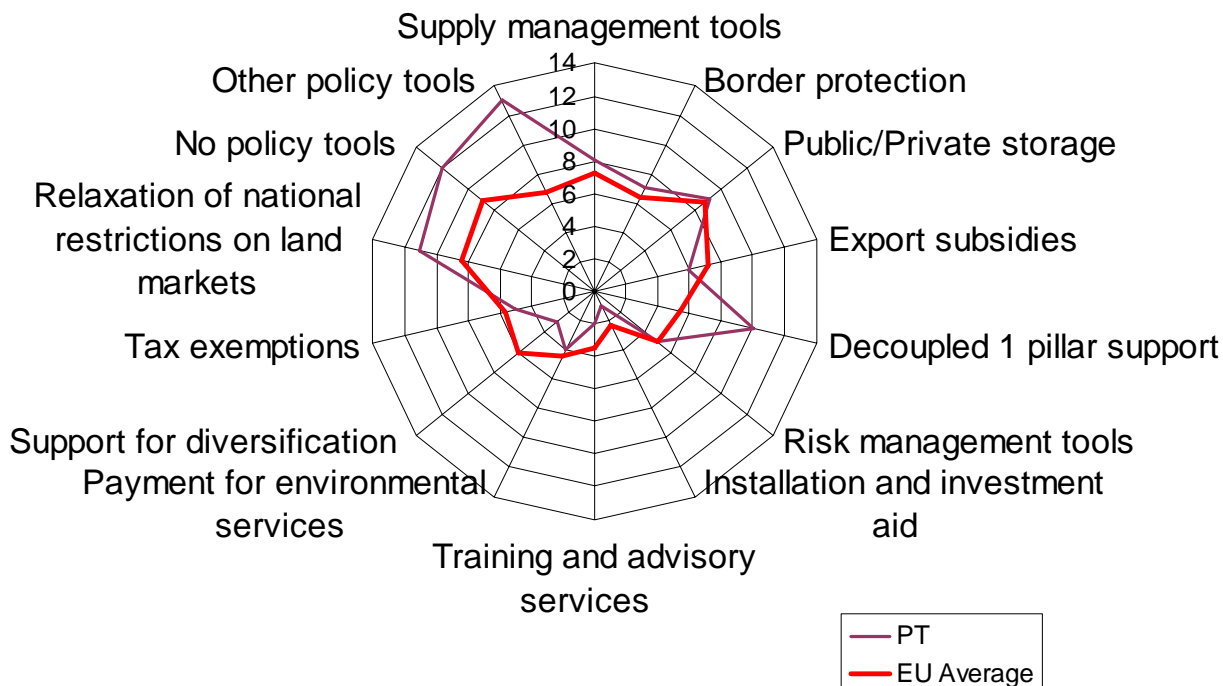
Question 1 results:

Graph 26
Portugal: Key objectives identifying the European Model of Farming by 2015



Question 2 results:

Graph 27
Portugal: Key policy instruments for the Future Model of Farming by 2015 (1=most important - 13=least important)



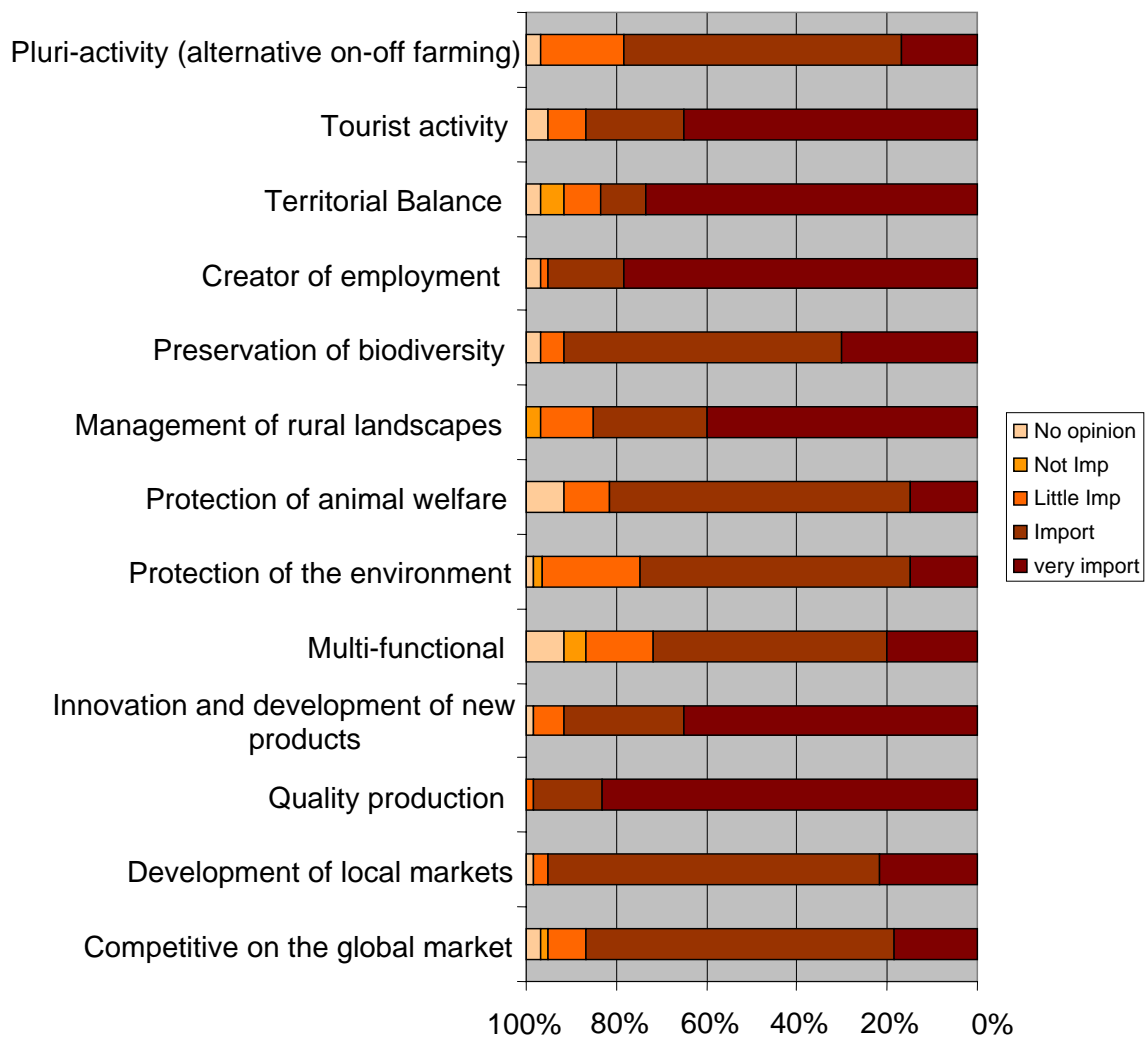
3.15 Slovenian Young Farmers

Slovenia's Young Farmers organisation **Zveza Slovenske Podezelske Mladine** sent some general information on their agricultural situation as a background to the outcome of the survey in their country:

Slovenia's countryside is characterized by many hills and agriculture therefore mainly concentrates on cattle breeding. Intensive agriculture is only possible in the vicinity of larger urban cities. Two thirds of the country is forest. There are about 72.000 farms whose average size is 5,5 hectares and about 1.500 professional farms with 24 hectares each. Those farms are mostly working in the dairy sector. This situation is linked to a political decision in the past that imposed a farm size limit of 10 hectares. After abolition of this rule the situation is improving but it takes some time. Slovenian farms are expected to enlarge their surface of about 20 percent until 2015. There will be less investment in direct production as they expect more money to be invested in tourism and other services. It is crucial for Slovenian young farmers to underline the importance of agriculture as it is the basis of rural settlement. They are organising local action groups for finding out about the needs of rural areas and transferring money to corresponding projects. There are developed special programs for rural development such as CRPOV (Integrated Rural Development and Village renewal Programmes) and NATURA 2000.

Question 1 results:

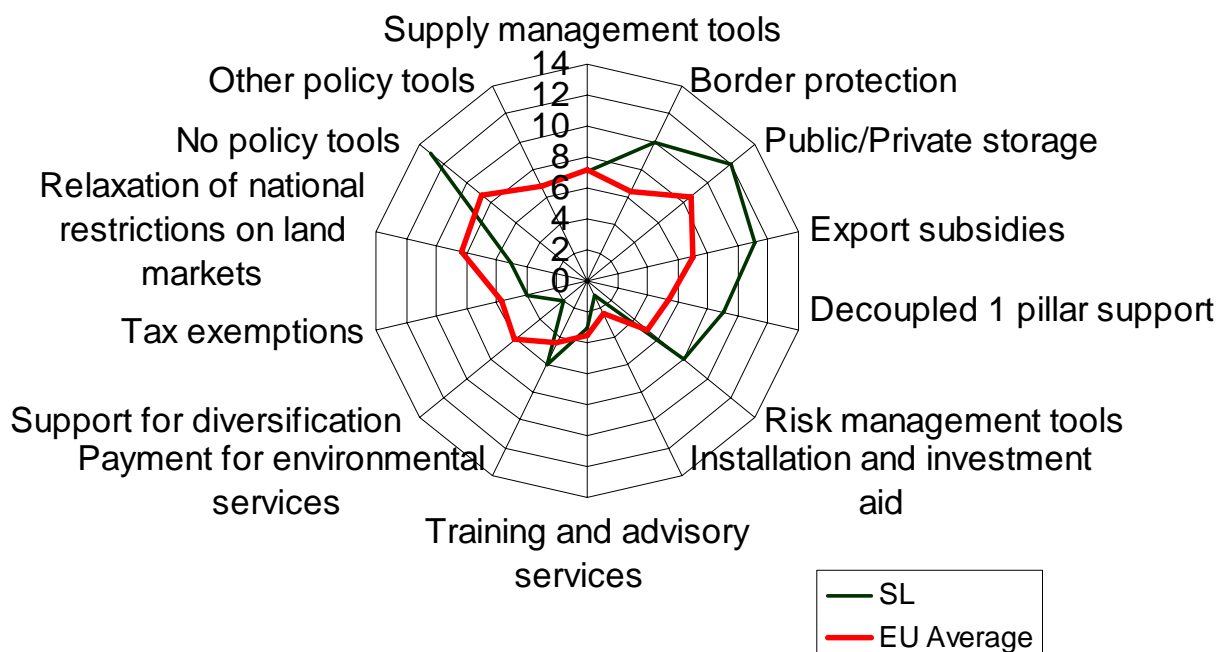
Graph 28
Slovenia: Key objectives identifying the European Model of Farming by 2015



Graph 29

Slovenia: Key policy instruments for the Future Model of Farming by 2015

(1=most important - 13=least important)



3.16 Spanish Young Farmers

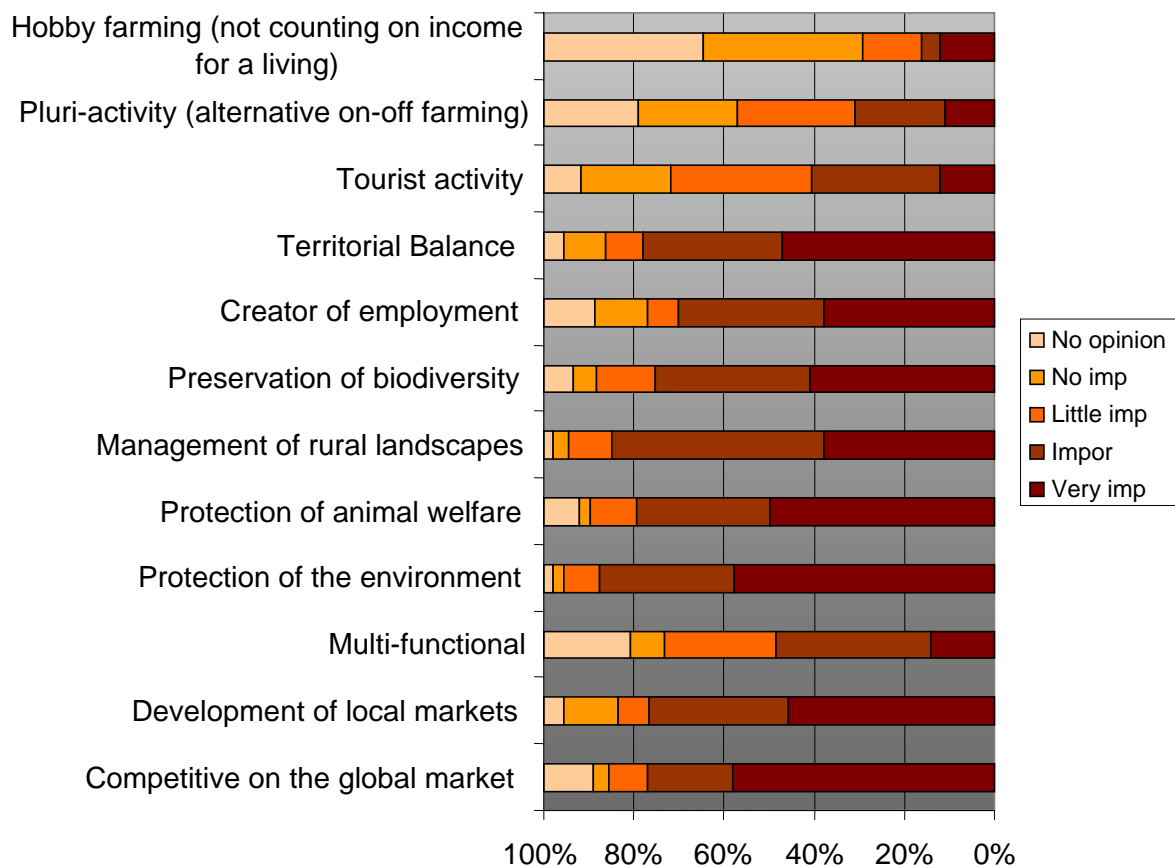
Young farmers from the Spanish organisation **ASAJA** think that quality production will be the key objective by 2015. They consider risk management tools, such as assurance cost for instance, the most important policy instruments in order to assure realization of this objective. They also think it is very important to:

- Keep the preference to Community products from the EU
- Establish the same conditions for import products from third countries
- Assure financial aid to promote the use of European commodities in renewable energies
- Put no limits on the size of a farm
- Maintain policy tools at EU level
- Decide on long-term reforms instead of permanent changes

Young farmers from ASAJA believe food products to be the most important element of agricultural production by 2015, followed by non-food on second and other goods and services on third place.

For Spanish young farmers from **COAG**, the most important key objective for a model on European farming by 2015 is insuring competitiveness of their food products in the context of global markets. They identified two other very important objectives: protection of the environment as well as preservation of the rural population and the territory. This means that biodiversity, development of rural landscape and of local markets seem essential for a successful agriculture in 2015 to them. For realizing their ideas of European agriculture the most important policy instruments are financial aid and tax exemptions for farmers. A combination of food and non-food production is seen as priority production by 2015. Spanish Farmers will survive in the future if they are competitive by combining price and diversification.

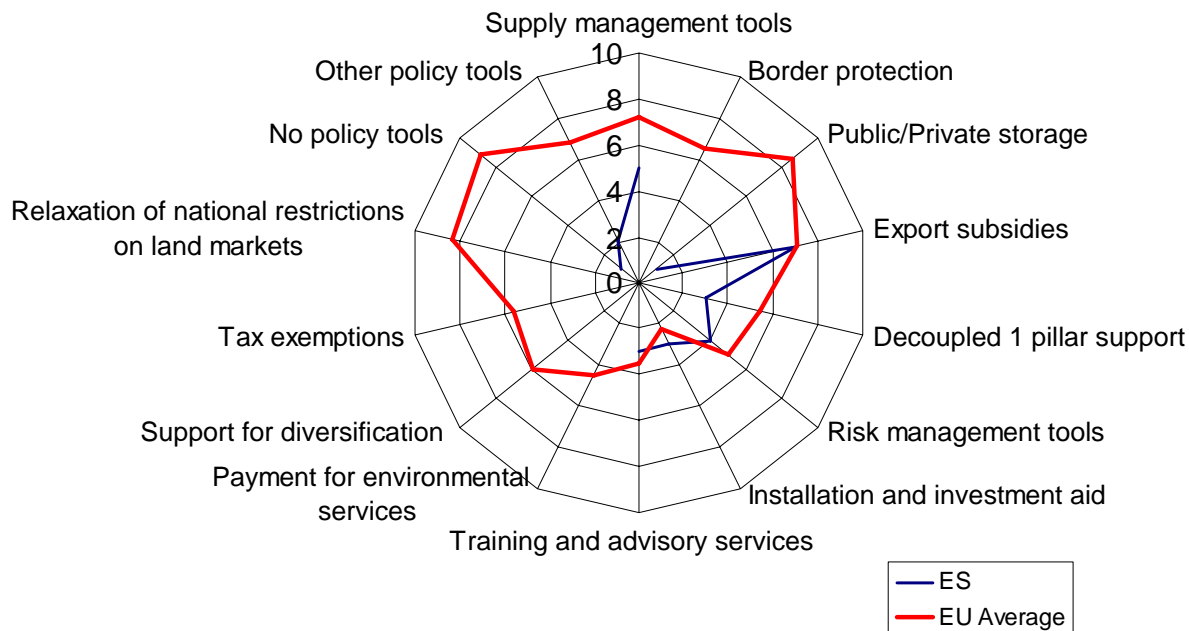
Graph 30
Spain: Key objectives identifying the European model of farming by 2015



Question 2 results:

Graph 31 Spain: Key policy instruments for the Future Model of Farming by 2015

(1 = most important / 13 = least important)



3.17 Swedish Young Farmers

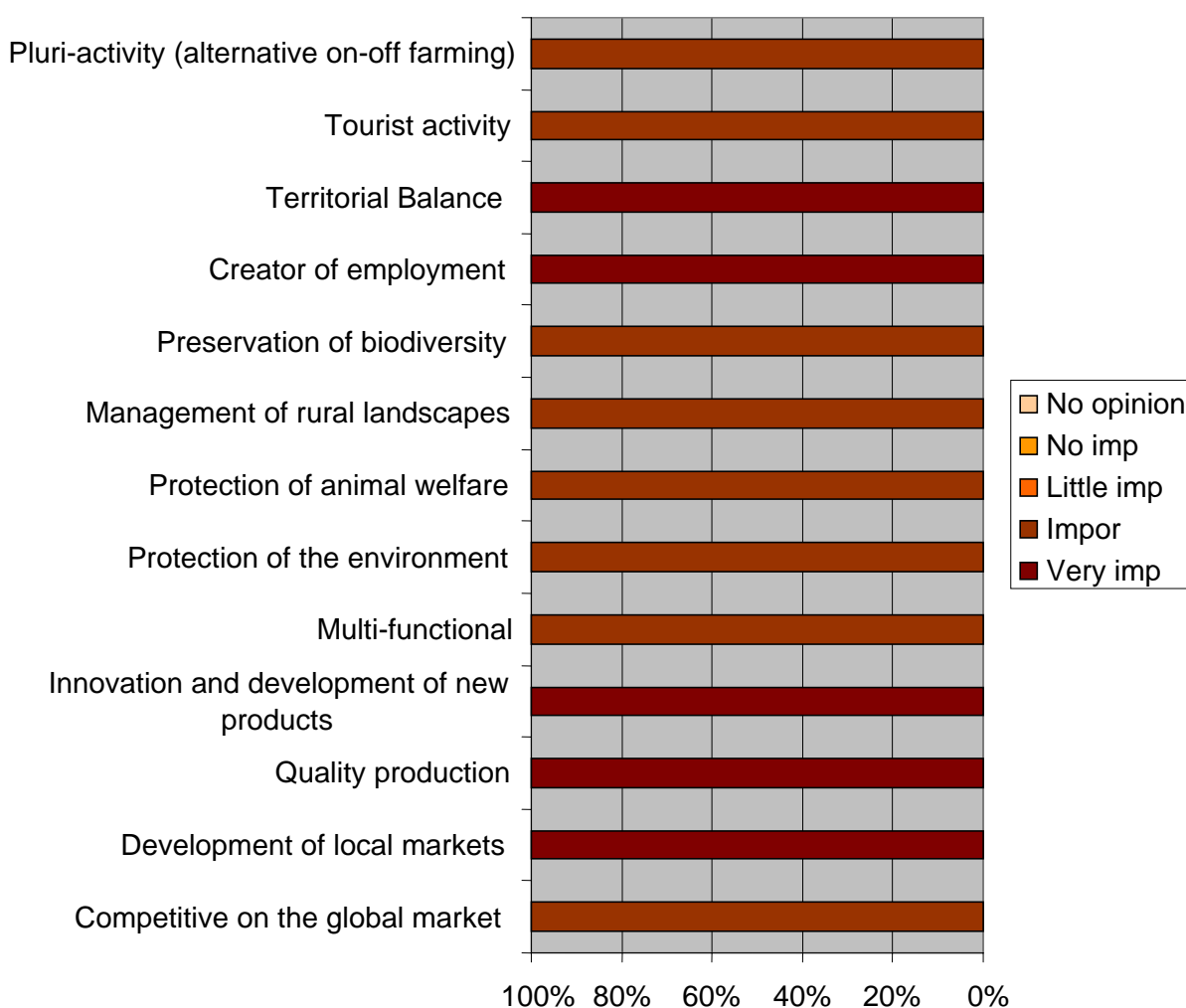
The Swedish Young Farmers organisation **Lantbrukarnas Riksförbund** received very few answers although the questionnaire was even translated into Swedish. For those who answered, quality production, environmental protection, animal welfare, management of rural landscape, protection of biodiversity and territorial balance are the most important aspects for farming in the future. Policy instrument considered to be essential by Swedish young farmers are installation and investment aid, risk management tools, payment for environmental services as well as training and advisory services. By 2015, Swedish young farmers think that the production of food will still be their most important activity and they will survive increased competition through quality production.

3.18 UK Young Farmers

The **National Federation of Young Farmers Clubs (NFYFC)** has mainly received responses from members of the Welsh YFC. To them, the most important policy instruments are development of local markets, quality of production, innovation and development of new products, preservation of biodiversity, territorial balance and creation of employment. All other suggested instruments were rated as important. Question number two was difficult for them to answer and CEJA has no results so far. By 2015 UK farmers' most important activity will still be the production of food. However, they think that diversification of products will be the most efficient way for the EU farmer to stay competitive.

Question 1 results:

Graph 32
UK-Wales: Key objectives identifying the European Model of Farming by 2015



DISCLAIMER:

The results of our survey presented here have mainly informative character. The opinions expressed are the opinions of individual young farmers at farm gate level and do not necessarily take into consideration wider macroeconomic developments. As a consequence, the opinions expressed in this paper should not be interpreted as an official position from Europe's young farmers' organisations. Moreover, the document should not be interpreted in a way that is used to prove that young farmers would accept far-reaching change in agriculture policies. The document does not constitute a "tool box" from which policy makers can add or eliminate tools as they seem fit.