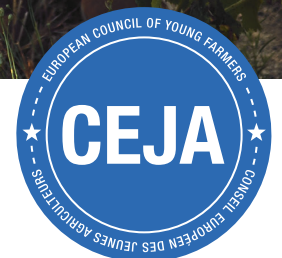


EUROPEAN YOUNG FARMERS

— SURVEY —

Building a Sustainable Sector



Foreword

“When it comes to empowering a new generation of innovative and ambitious farmers and agricultural professionals to build the sustainable agriculture and agri-business of the future, let’s work together to plant the trees now. We need to stimulate a new generation of young agri-innovators and agri-entrepreneurs to develop the agri-food sector of the 21st century. In so doing, we will keep the countryside alive and promote a more sustainable, competitive and modern agriculture.”

PHIL HOGAN,
European Commissioner for
Agriculture & Rural Development



Young farmers are key to an agricultural sector that is sustainable, diverse and inclusive. Without young farmers in the fields of Europe the future of food production and open landscapes would be compromised. Nowadays, those working in agriculture are beset by challenges, from the need for better access to land and the simplification of administrative procedures, to additional education and training opportunities. Understanding these problems and developing solutions to them is of the utmost importance in attracting potential young farmers to the sector and ensuring those already in it remain. It is also vital to the well-being of European society as a whole.

In light of this, CEJA collaborated with DeLaval in a positive and satisfying partnership to create and compile a survey. The resulting report aims to clarify the position of European young farmers on issues that encompass economic, environmental and sociological concerns so that they may be taken into account at the political level. CEJA is dedicated to representing the interests of European young farmers. A document of this nature is essential in the organisation’s promotion of a younger and more innovative agricultural sector, as well as increasing awareness about the circumstances of young farmers across the EU.

JANNES MAES,
CEJA President



The future of sustainable and profitable agriculture is in the hands of young farmers providing nutritious and sustainable food to a growing population. They need to produce more food with fewer resources, i.e to do more with less. But there are significant challenges we all need to address as the young people of today also put forward demands in order to enter or remain in the agricultural sector. This is therefore very much an issue of attracting and retaining people in the agricultural sector. How do we ensure that?

Businesses, politicians and science all have a role to play in supporting young farmers to develop the sector in order to meet future challenges such as globalisation, climate change and consumer expectations. The challenges of young farmers are also ours and we must face them together.

DeLaval is committed to supporting the future of farming and that means supporting young farmers. Our customers are dairy farmers from around the world. It is of vital importance that we listen to their needs and expectations in order to support them in the best possible way. We have chosen to collaborate with CEJA for this reason and are very satisfied with our partnership and the outcome of the resulting survey.

JOAKIM ROSENGREN,
DeLaval President & CEO

The report outlines the results of an EU-wide survey among young farmers carried out by CEJA and DeLaval in all Member States. Based on a questionnaire, the objective was to discover the opinion of young farmers in relation to the sustainability of the agricultural sector, together with the challenges they face and the opportunities they see in being a young farmer.

The survey has revealed important findings on the factors that young farmers consider important to develop a farm in an economically sustainable way. Overall, the results show that the most significant barriers for young people wishing to enter or remain in the agricultural sector are:

- ▶ a fair income level;
- ▶ access to land;
- ▶ simplification of administrative procedures; and
- ▶ a fair competition from global markets.

The findings of the survey indicate that young farmers need on-farm investments to develop their activities, and more specifically they need investments for farmland expansion, knowledge development, and farm management optimisation technology.

These four factors were singled out as a range of tools that young farmers consider essential on-farm investments in order to cater for their varied needs. It is imperative that future policies take this into account.

Young farmers are the new environmentalists because they acknowledge their responsibility in contributing to sustainability and they are also willing to carry out environmental measures at farm level, where the decisions to safeguard the environment take place in practice.

The results reveal that most European young farmers are environmentally conscious, they

believe that sustainable farming contributes to the protection of the environment and that a healthy environment provides them with benefits, namely sustained biodiversity and ecosystems, enhanced natural resources, and efficiency improvement.

To safeguard the environment through farming practices, young farmers have indicated that they need measures that are practical to implement on the ground, civil society's recognition of the public goods they provide to the community, investment support and coherence between local, national and European measures. They endeavour to protect biodiversity, promote human health, and improve soil structure and fertility, while sustaining rural landscapes.

Rural areas across the EU have to be territories where people can live and work freely, enhancing the growth of jobs through investment in the local economy. Making rural areas more viable means that farmers will require an array of new services for the benefit of all, including broadband, childcare and schooling, and transport links.

Moreover, the results of the survey suggest that European young farmers believe that animal welfare is essential to ensure economic profitability and sustainability.

In conclusion, the findings also suggest that most European young farmers think a future as a young farmer is possible, despite fierce competition from global markets, high administrative burdens, and the low economic profitability of their activities.

They believe so because they are passionate about agriculture and maintain a strong belief in sustainability as the only way forward to feeding a growing population despite shrinking natural resources.

Executive Summary

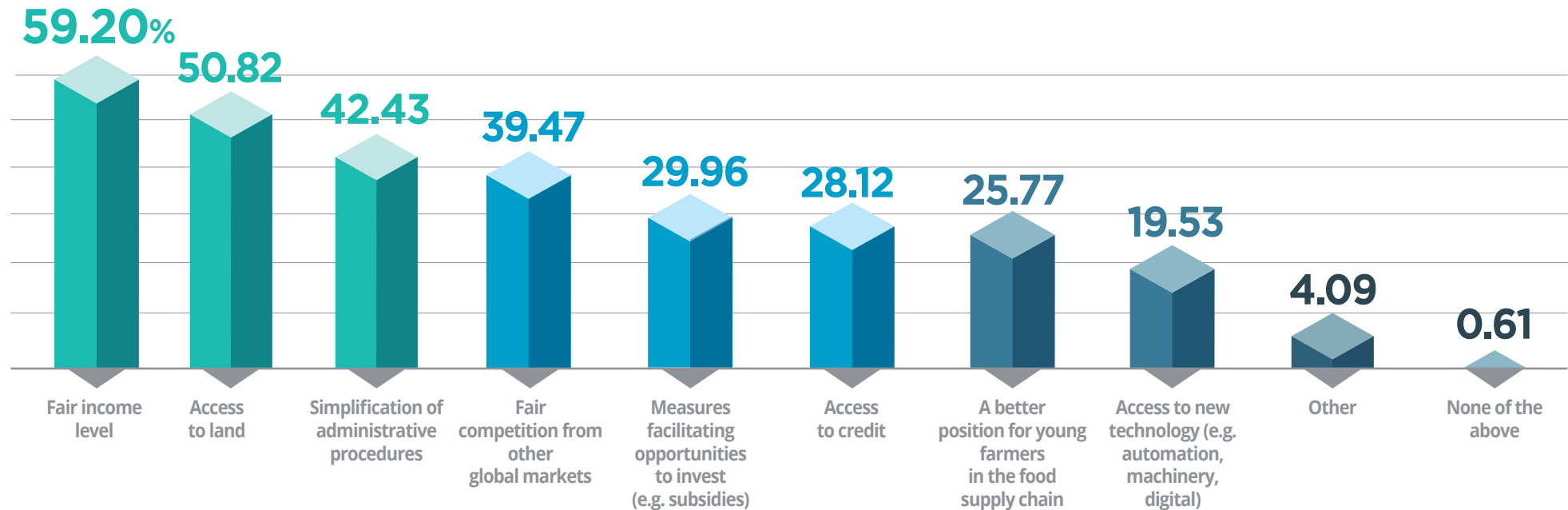
“ There are three things I wish for the future of our young farmers. Firstly, that European legislation will create more opportunities for tomorrow’s innovations. Especially young farmers are passionate about the use of new technologies in the field of precision agriculture, circular economy and animal health. Secondly, I would like farmers to be able to earn a good income without depending on subsidies. Lastly, I hope that society will appreciate young farmers more for their unprecedented effort to produce high quality food while at the same time reducing the environmental impact and improving animal welfare.”

JAN HUITEMA,
Member of the European Parliament



Key Findings

What would you need to develop your farm in an economically sustainable way?



A fair income level (59.20%) is the first most important factor for the development of an economically sustainable farm. Today access to land is the most significant barrier for young people wanting to enter and remain in the agricultural sector and this is confirmed by the result in which the respondents have selected **access to land (50.82%)** as the second one most relevant factor for the development of an economically sustainable farm.

Another important factor identified by the respondents is the simplification of administrative procedures (42.23%).

Harmonised and simplified legislation among Member States that is valid in the long term is key and it enables a sense of trust to be created thereby encouraging farmers to invest and remain in the sector.

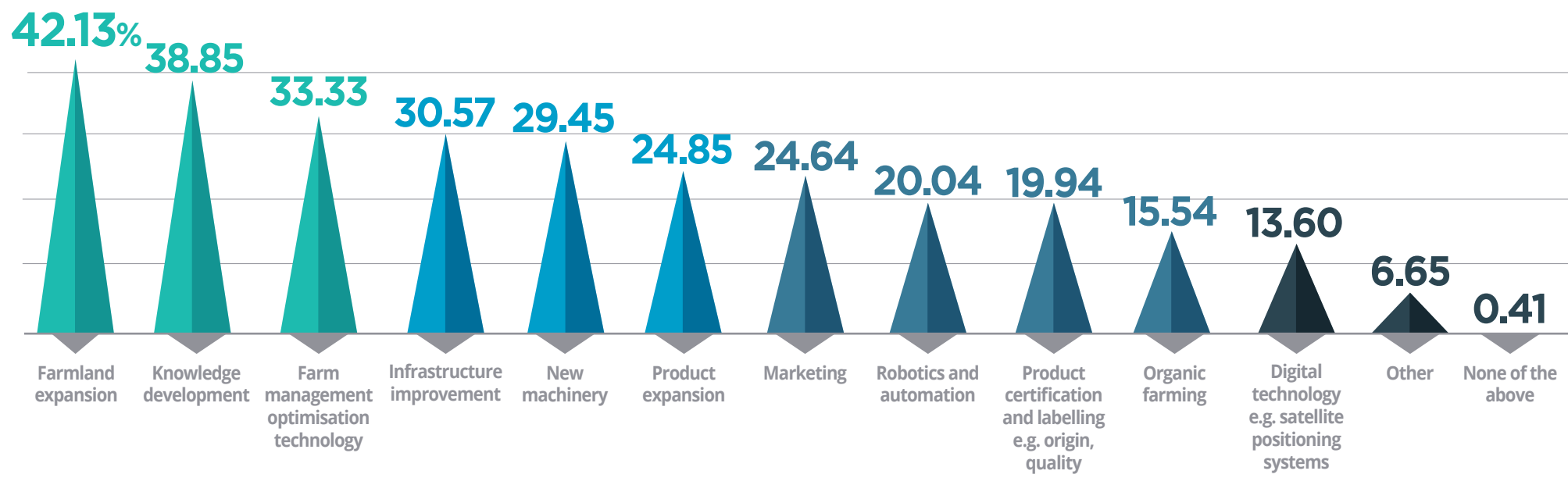
Lastly, **fair competition from global markets (39.47%)** is also seen as imperative.

A fair income level is particularly significant in some Member States such as Austria (81.18%), Finland (75.86%), France (74.36%), Belgium (72.88%), the UK (64.15%), Germany (63.53%), the Netherlands (61.18%) and Spain (60.67%).

Whereas access to land is given homogenous importance across Member States, the simplification of administrative procedures is among one of the most important factors for France (60.26%), Poland (57.14%), Denmark (57.14%), Austria (56.47%) and Slovenia (54.76%).

With regard to fair competition from global markets, Swedish young farmers consider it to be a predominant factor (71.67%).

What are the 3 most important on-farm investments you would make to develop your farm in an economically sustainable way?



Young farmers are eager to embrace innovation, smart agriculture and science-based research to guarantee a sustainable, profitable and productive future for farming. The survey results suggest there is a correlation between the problem of access to land and the will to invest in land expansion.

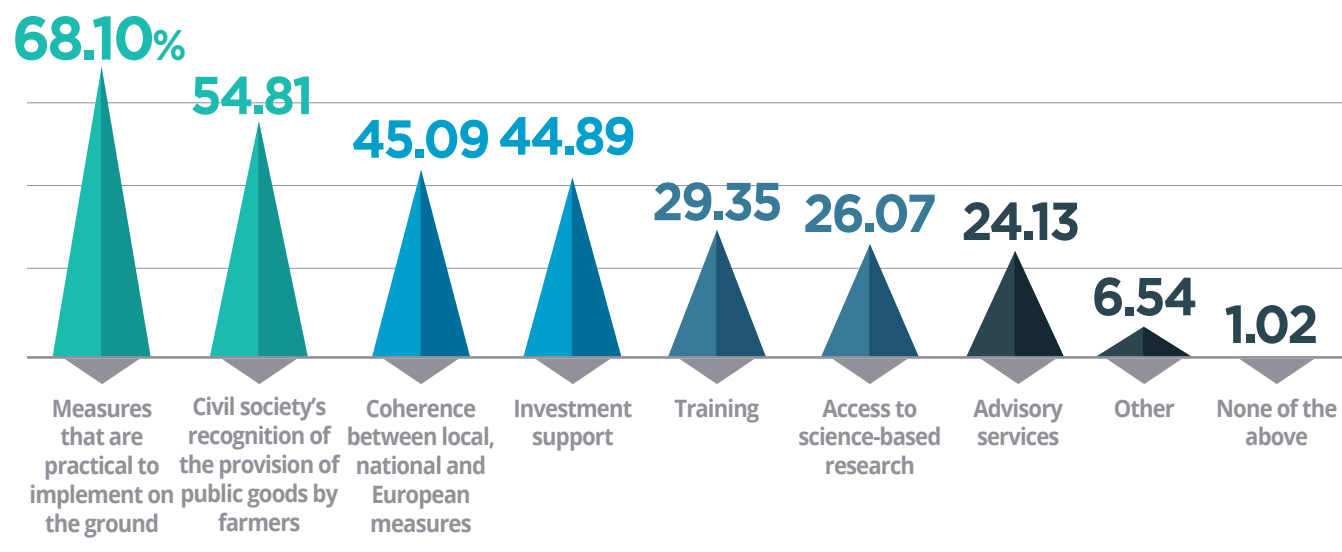
In order to achieve a sustainable agricultural sector, young farmers must invest and gain access to land to set up and develop their farm, acquire new or used machinery, optimise their technology and diversify activities on their farm.

Concerning on-farm investments it can be observed that the following investments figure as the most relevant: **farmland expansion (42.13%), knowledge development (38.85%), farm management optimisation technology (33.33%) and infrastructure improvement (30.57%).**

It is worth noting that the four above mentioned factors were singled out by the respondents as a range of tools that young farmers consider essential on-farm investments in order to cater for their varied needs. It is imperative that future policies take this into account.

Farmland expansion is particularly important in Poland (61.90%), the Netherlands (57.65%), Ireland (51.35%), the UK (49.06%) and Sweden (48.33%). Knowledge development is especially valued in Ireland (62.16%), Malta (59.09%), Denmark (53.57%) and the Netherlands (49.41%). Farm management optimisation technology is particularly relevant in Denmark (53.57%), Belgium (45.76%) and Lithuania (44.44%).

As a European young farmer, what do you need most to enable you to safeguard the environment through farming practices?



The factor that is perceived as most needed in order to deliver the best environmental benefits while simultaneously ensuring profitable production from sustainable agriculture is: **measures that are practical to implement on the ground (68.10%)**.

Young farmers believe that their work must be recognised as public goods for civil society. Young farmers endeavour to protect biodiversity, promote human health, and enhance soil structure and fertility while ensuring the continuation of sustainable rural landscapes. Receiving recognition from

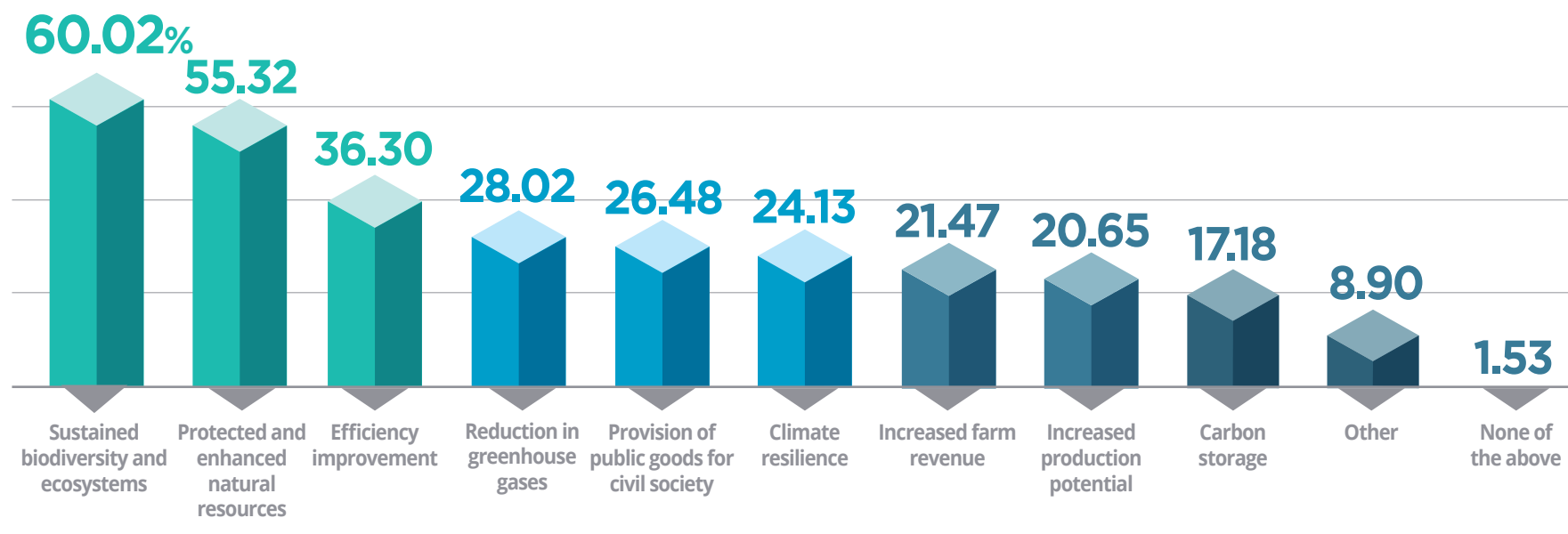
civil society of the provision of public goods by farmers was chosen by **54.81%** of the respondents.

Investment support was chosen by 45.09% of the respondents as young farmers are eager to embrace the implementation of innovative technology, science-based research and farm management practices to guarantee a sustainable, profitable and productive future for farming.

Coherence between local, national and European measures is needed according to 45.09% of the respondents.

While measures that are practical to implement on the ground are given homogenous importance among young farmers, it is worth noting that they are particularly relevant in Ireland (81.10%), Austria (80%) and the Netherlands (80%). Civil society's recognition of farmers' provision of public goods is seen as most needed in Sweden (78.30%), Austria (76.50%) and the Netherlands (72.90%). Investment support is one of the most important factors in Poland (66.70%), Lithuania (63%) and Ireland (51.40%). Coherence between local, national and European measures is considered most relevant in France (74.40%), Belgium (61%) and Spain (59.60%).

What is the benefit of contributing to environmental sustainability through agricultural practices?



Young farmers are environmentally conscious and aware of current and future environmental and agricultural sustainability issues and challenges. At the forefront of their land management practices are environmental protection and biodiversity conservation.

The survey shows that for young farmers, the benefits of contributing to environmental sustainability through agricultural practices are **sustained biodiversity and ecosystems (60.02%)**, **protected and enhanced natural resources (55.32%)**, and efficiency improvement (36.30%). Efficiency improvement is key to achieving high production rates with fewer resources. Indeed, in many instances,

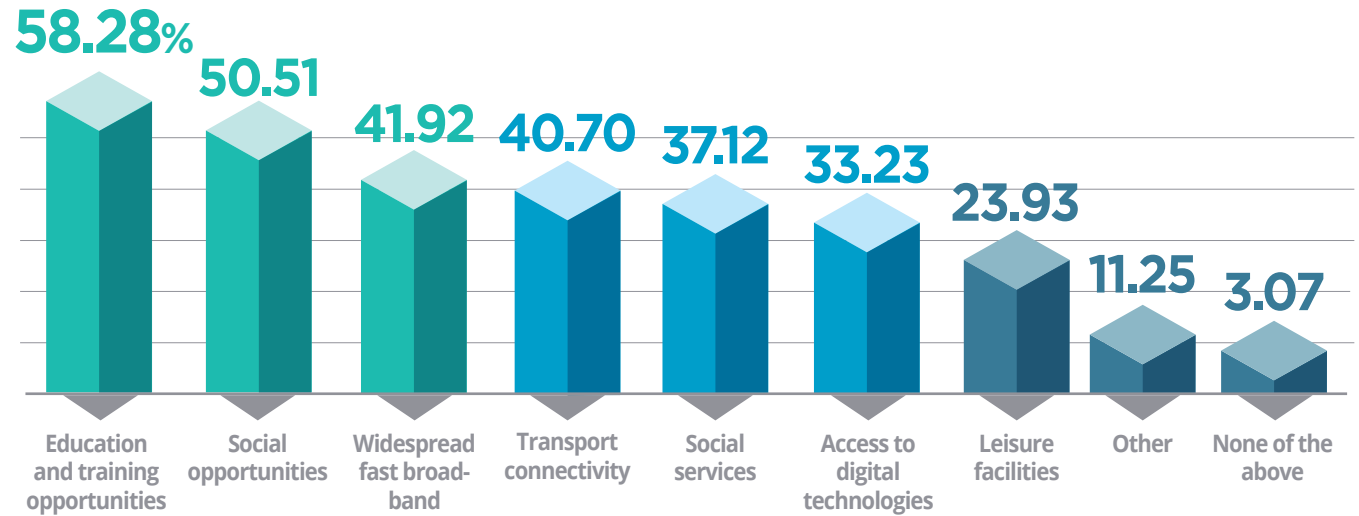
young farmers must choose to do more with less as part of their profession.

Young farmers believe they have less of a positive impact on climate resilience compared to protecting and enhancing natural resources and biodiversity.

Sustained biodiversity and ecosystems are considered major benefits in Malta (77.27%), Austria (75.29%), Sweden (73.33%), Spain (68.54%) and Italy (65.71%). Protected and enhanced natural resources are important benefits in Slovenia (80.95%), Lithuania (77.78%) and the UK (75.47%).



What do you think is necessary to lead a vibrant and sustainable lifestyle in a rural community?



Looking at sustainability from a social perspective, there is a need to modernise the vocational training provided in rural regions as demonstrated by the fact that **58.28% of the respondents consider education and training opportunities as most necessary** to a vibrant and sustainable lifestyle. Programmes that promote learning among farmers are required for efficient and effective knowledge transfer. Access to education for families with children is also important within rural communities. Young people in rural areas must be given access to the services afforded to their urban colleagues. The same facilities that are made available in towns and cities – such as high speed broadband – should also be present in rural areas. There is a need to ensure a countryside in which young farmers can develop their farm and lead a fulfilling life. Young farmers consider **social opportunities (50.51%), widespread fast broadband (41.92%) and**

transport connectivity (40.70%) as necessary to leading a vibrant and sustainable lifestyle in a rural community.

Education and training are seen as particularly necessary in Malta (86.36%), Slovenia (78.57%), Belgium (78.27%) and Denmark (71.43%).

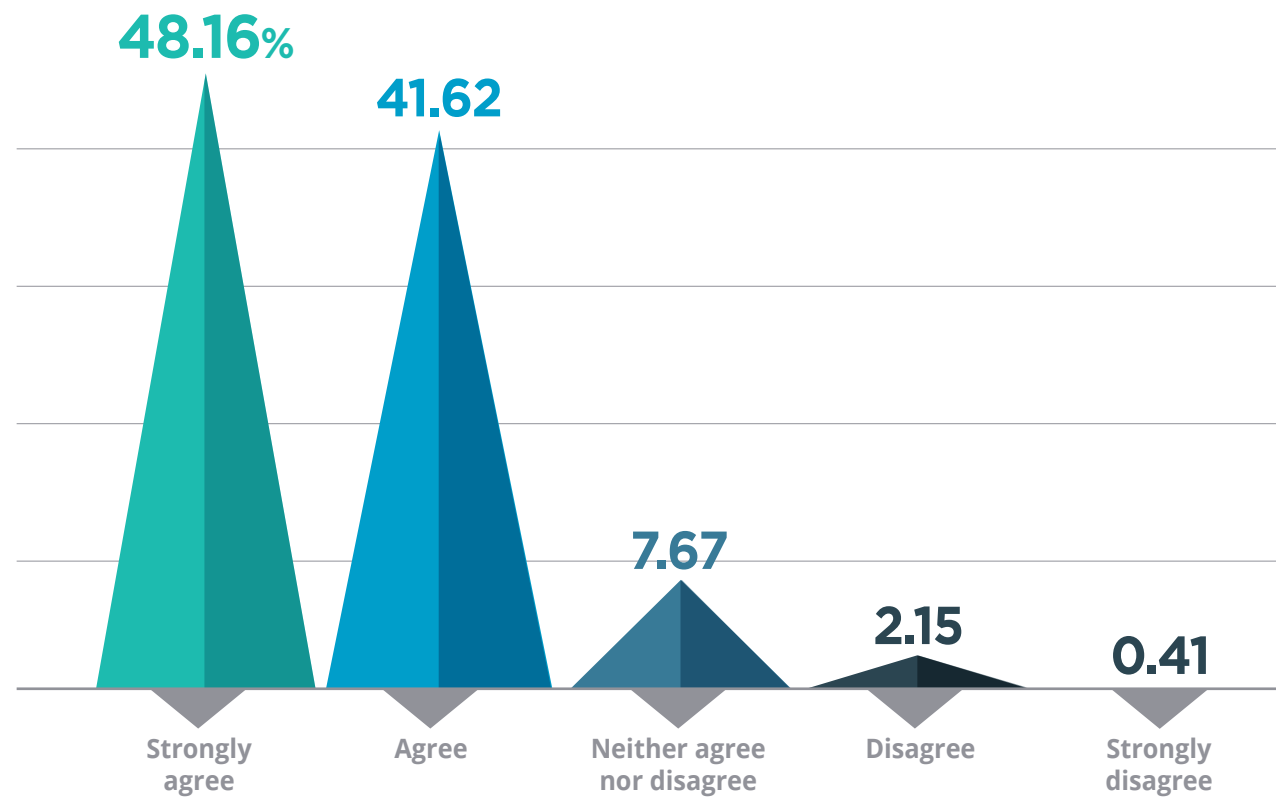
The need for social opportunities is particularly felt in the UK (71.70%), Malta (68.18%) and Austria (64.71%).

The necessity of having widespread fast broadband is high in Ireland (89.19%), Germany (63.53%) and France (62.82%).

Italian young farmers feel a need for transport connectivity (70%) to improve their social life, followed by Swedish (51.67%) and Finnish (48.28%) young farmers.

European young farmers are now faced with the challenges of producing more with less, while also being custodians of the countryside.

As a young farmer, do you feel responsible for ensuring a sustainable agricultural sector?



Young farmers perceive themselves as custodians of the countryside. They are well aware of agricultural sustainability issues and challenges and understand the significance of their role in safeguarding the environment for future generations.

This is confirmed by the results of the survey in which **the majority (89.78%) of young farmers feels responsible for ensuring a**

sustainable agricultural sector. The result was reached by combining the 48.16% who answered strongly agree with the 41.62% who answered agree.

Those who feel most strongly about sustainable agriculture are in Italy (68.57%), Denmark (67.86%), Malta (63.64%) and Austria (61.18%).



Are you involved in a young farmers' organisation?

64.62% 35.38%



Yes

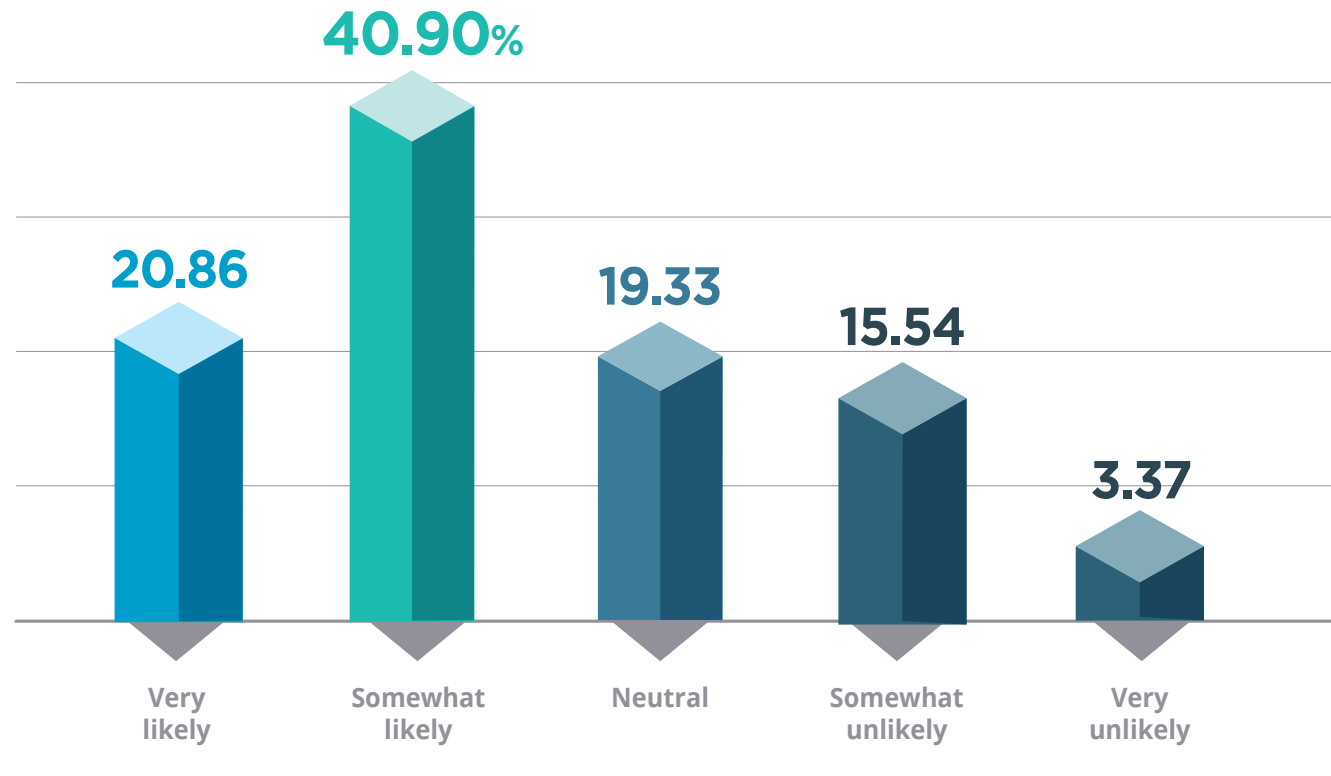
No

64.62% of young farmers are members of young farmers' organisations.

The countries with the greatest number of young farmers not associated with an organisation are Poland (73.81%), Sweden (56.67%), Germany (54.12%) and Slovenia (52.38%).

Young farmers' organisations are vital to rural areas as they help address the needs of social interaction and knowledge transfer among their members.

European farming today involves many demands and pressures, both professionally and personally, for farmers. In consideration of this, is your future as a young farmer viable?



A minority (20.86%) of young farmers thinks that a viable future in the sector is very likely. However, it is worth noting that 40.90% consider their future as young farmers to be somewhat likely. Therefore, when the two results are taken into consideration, a majority of young farmers (61.76%) believes that, personally and professionally, a viable future as a young farmer could be possible under certain circumstances.

(75.67%), France (73.75%), the UK (71.70%), Sweden (70%), the Netherlands (69.41%) and Lithuania (62.96%).

Respondents from Germany see their future as viable as more than 50% answered likely or very likely.

The young farmers who think that a viable future in the sector is very and somewhat likely are in Denmark (78.57%), Finland (75.86%), Ireland



“Agriculture is at the heart of the challenges of the 21st century: healthy food, energy and environment.”

“Farming is a way of life which still speaks to the heart of many young people.”

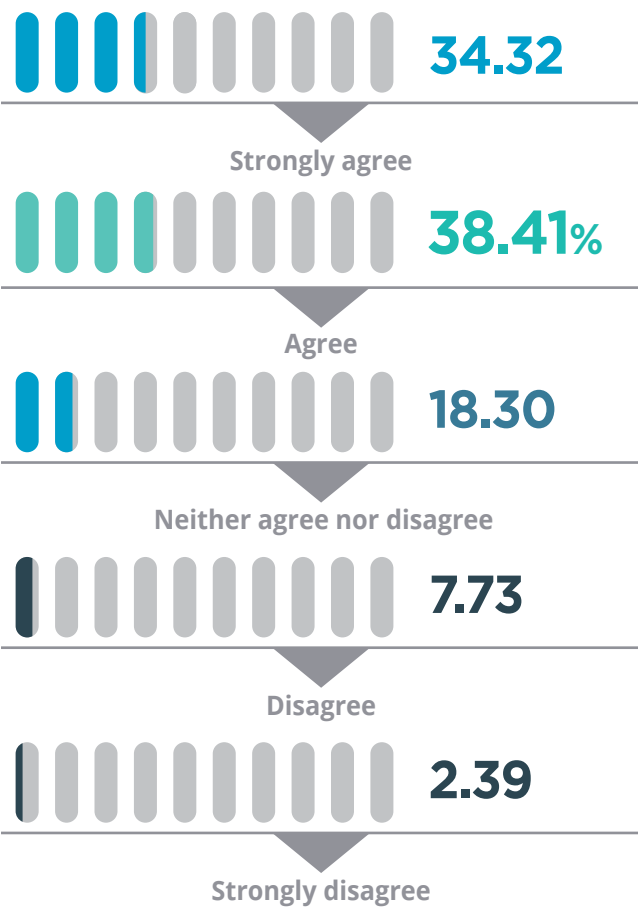
“High costs and financial uncertainty, combined with little public support discourage potential young farmers from going into farming.”

“Young farmers are willing to meet these demands, however the young farmer needs a level of economic sustainability in order to survive the challenges of market, price and margin volatility.”

“Legislation makes it difficult to take over a farm as a young aspiring farmer.”

WHY?

- ▶ Some respondents provided an explanation with their answer that demonstrated that in general, many of the respondents across the EU do not consider a viable future as a young farmer very likely because they do not believe farming to be a profitable economic activity. For instance, in France, many respondents commented that they are subject to high charges and administrative burdens. In Italy the respondents consider competition from foreign countries, especially big-agri business competition, as having a negative impact on their future as a young farmer. Interestingly, some of the respondents across the EU attribute the likelihood of sustainable farming to EU agricultural policies.
- ▶ On the other hand, the majority of the respondents who think they have a viable future in agriculture believe it is because they have inherited family farms with stable foundations, have a passion for agriculture and believe that sustainable agriculture is the way forward in feeding a growing population despite shrinking natural resources. This thinking is mainly due to a combination of food security and personal attachment to the profession of farming.



The majority (72.73%) of young farmers believes that animal welfare is necessary to increasing profitability and sustainability in the sector. 34.32% strongly believe that animal welfare increases profitability and sustainability while 38.41% agrees that animal welfare increases profitability and sustainability.

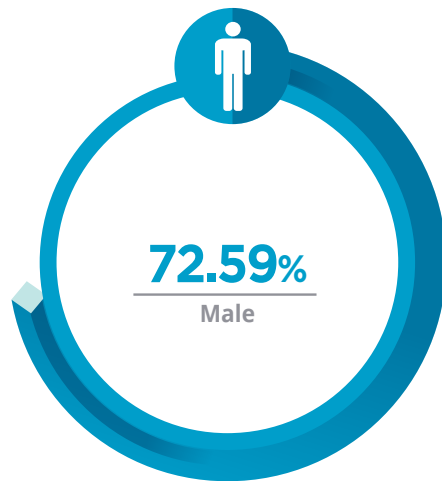
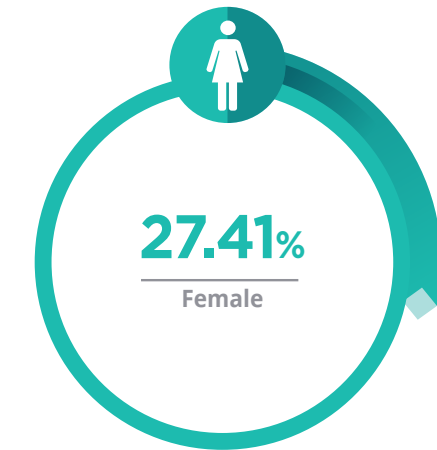
Aggregating the answers, it is worth noting that the farmers who most agree on the fact that animal welfare increases profitability and sustainability are in Slovenia (90.48%), Italy (88.57%) and Poland (85.72%).

Do you think investment in improving animal welfare on your farm is necessary to increase the profitability and sustainability of your farm?

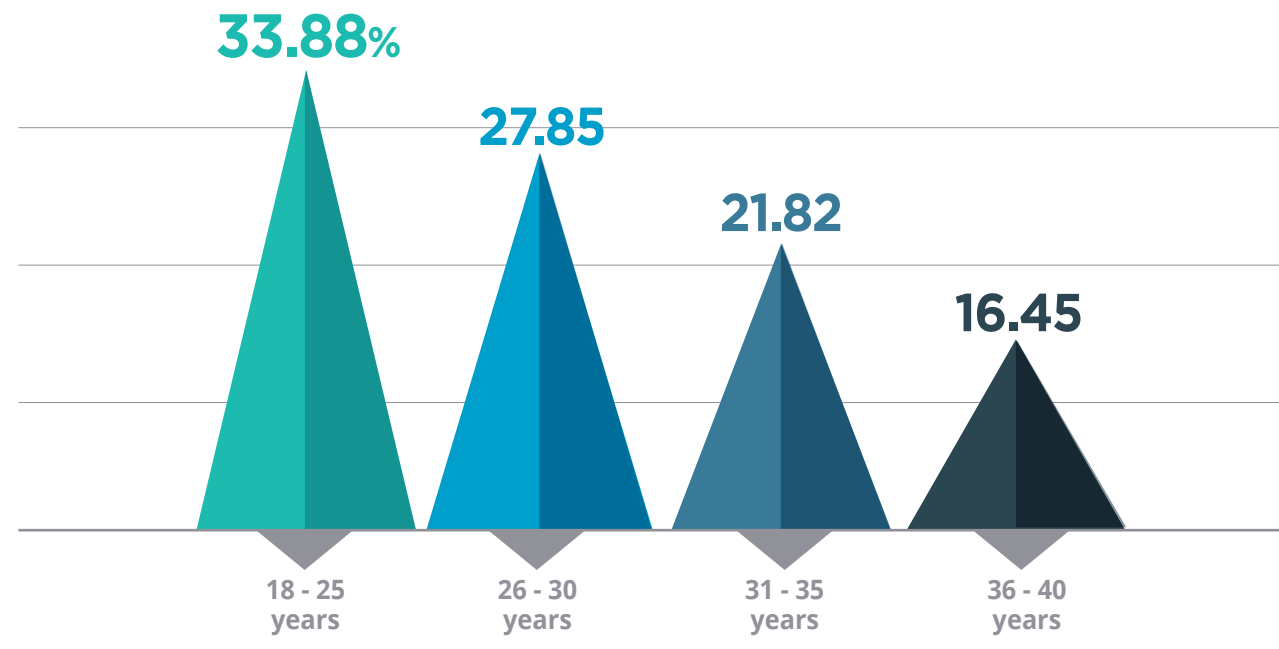


Characteristics of the Respondents

Gender



Age



The large majority of the respondents is aged between 18 and 35 (83.55%), with 33.88% aged between 18 and 25.

Looking at the correlation between the age of young farmers and how they perceive their future in the sector, it is notable that there is a similar distribution of results among the different age categories.

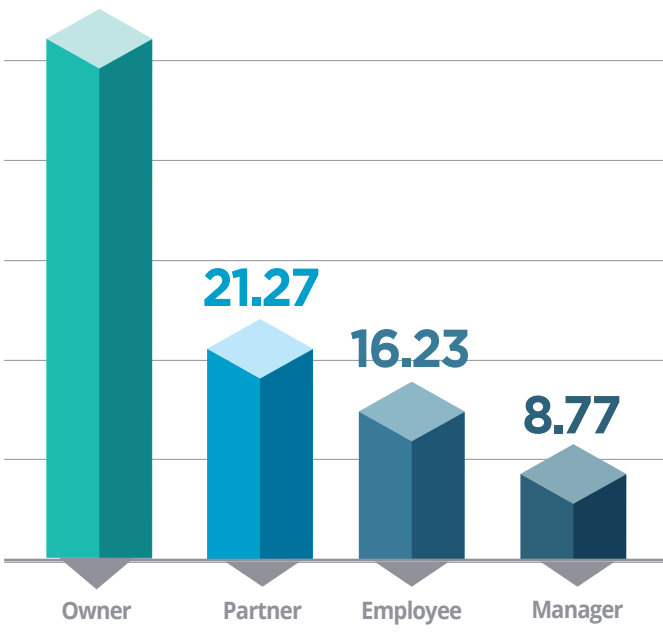
It is interesting to note that farmers aged between 18 and 25 are pre-eminently present in Austria

(58.82%), Belgium (54.24%) and the Netherlands (50.59%). In other countries, such as the UK, Italy, France, Germany, Poland, Spain and Ireland, the demographics are more homogenous with young farmers aged between 18 and 25 and those aged between 18 and 35 divided almost equally between the two age categories.



Function

53.73%



The countries where the majority of young farmers is a farm owner are Slovenia (83.33%), Lithuania (77.78%), Spain (71.91%), Finland (68.97%), Poland (66.67%), the Netherlands (60%), Italy (58.57%), Austria (57.65%) and France (51.28%).

Do you come from a farming family?





What type of farm are you involved in?



Family farm



Started own business



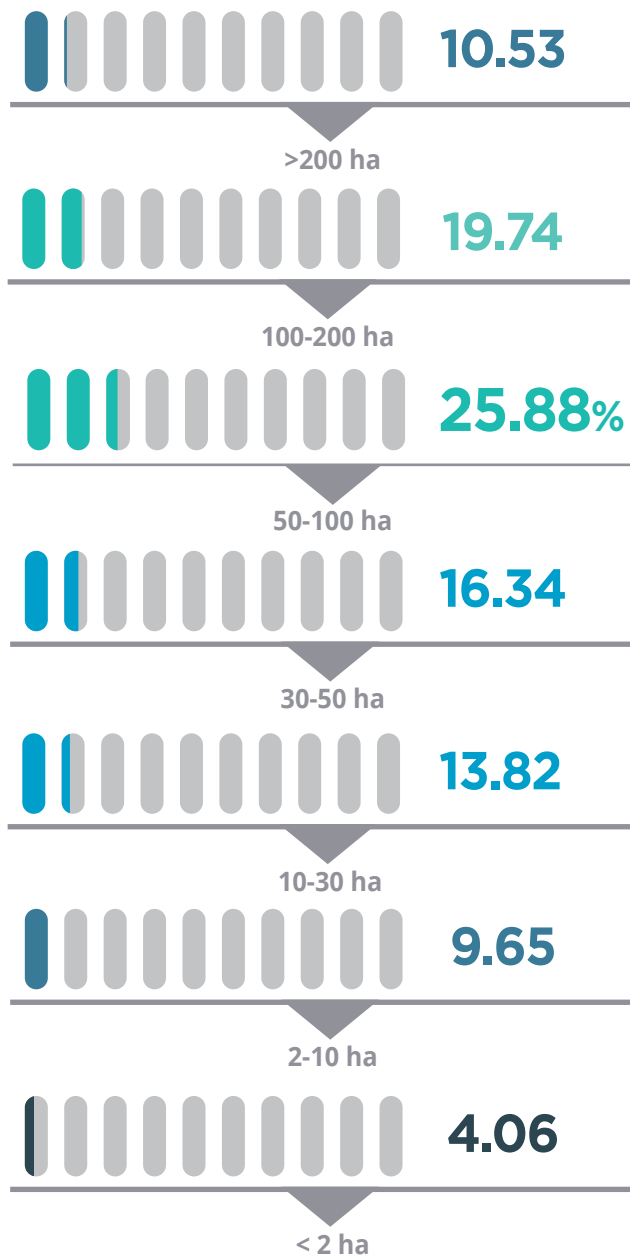
Recently installed on an inherited farm



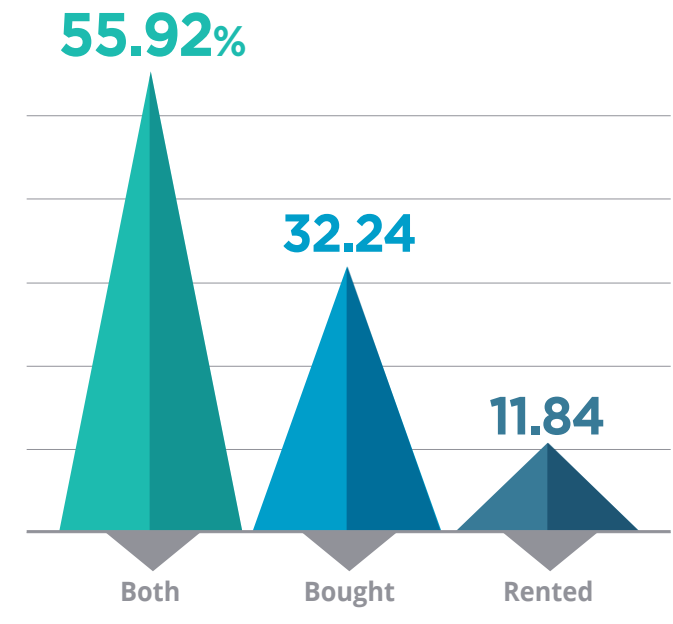
Other



What is the size of the farm?



Is the farmland owned or rented?

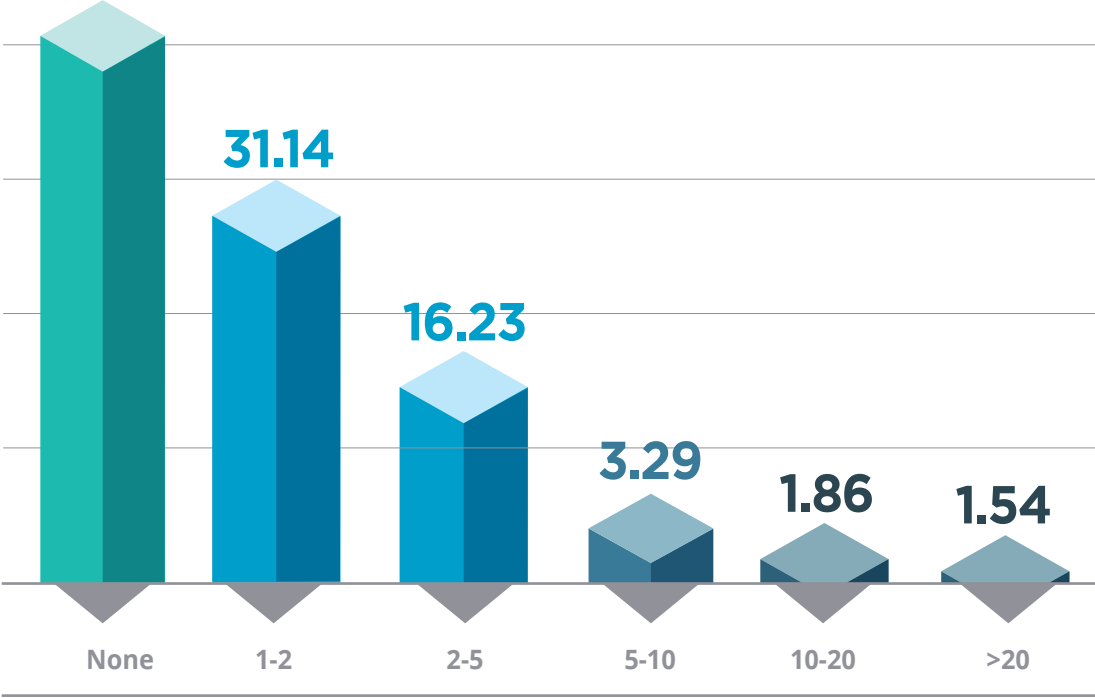


It is worth noting that in the following countries land is both owned and rented: Germany (89.41%), Austria (78.82%), Finland (75.86%), France (75.64%) and Sweden (75%). The countries where there is a clear majority of farmers who work on land that is bought are the Netherlands (76.47%), Poland (61.90%) and Belgium (50.85%), compared to the EU-wide 32.24%.



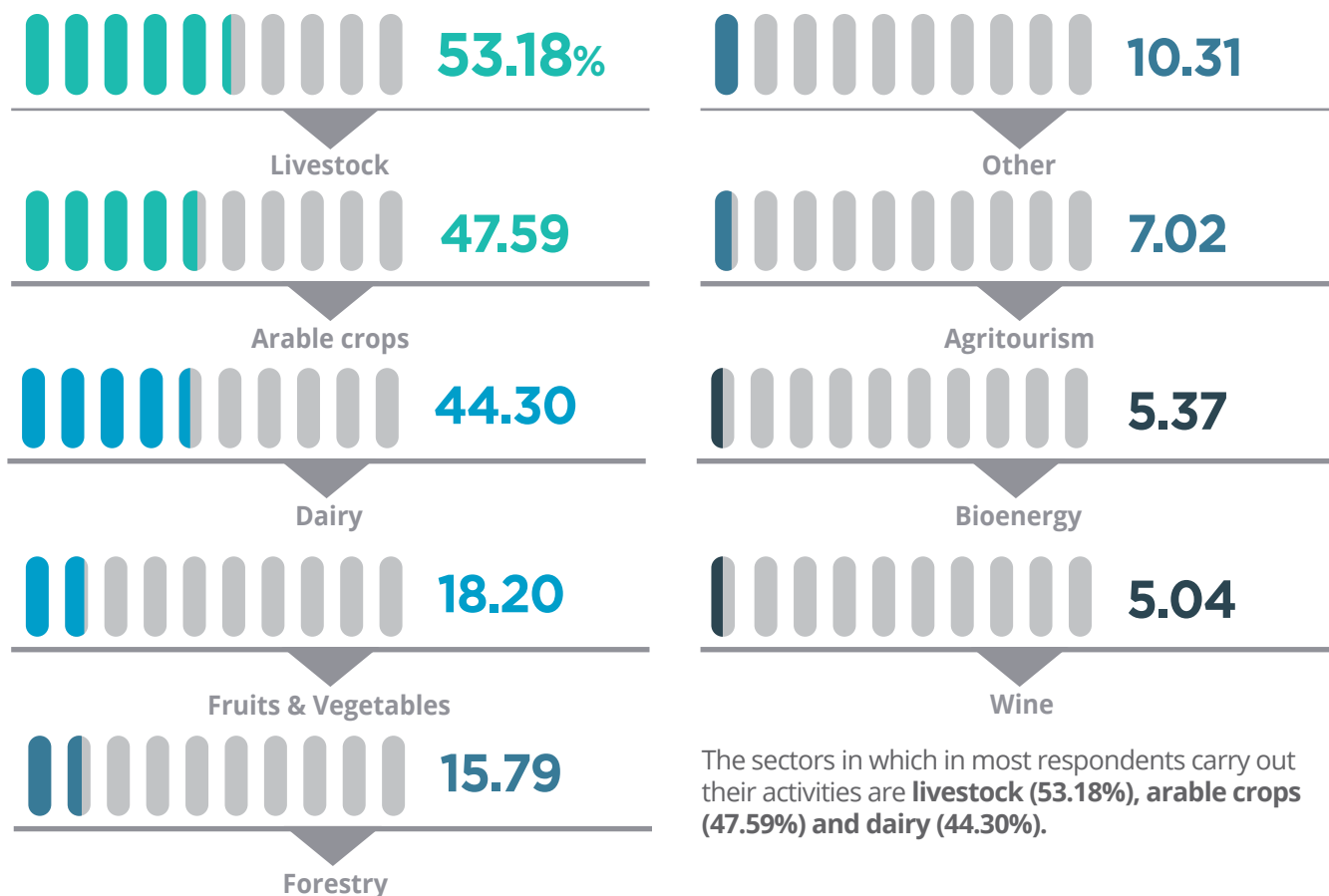
How many employees does the farm employ?

45.94%



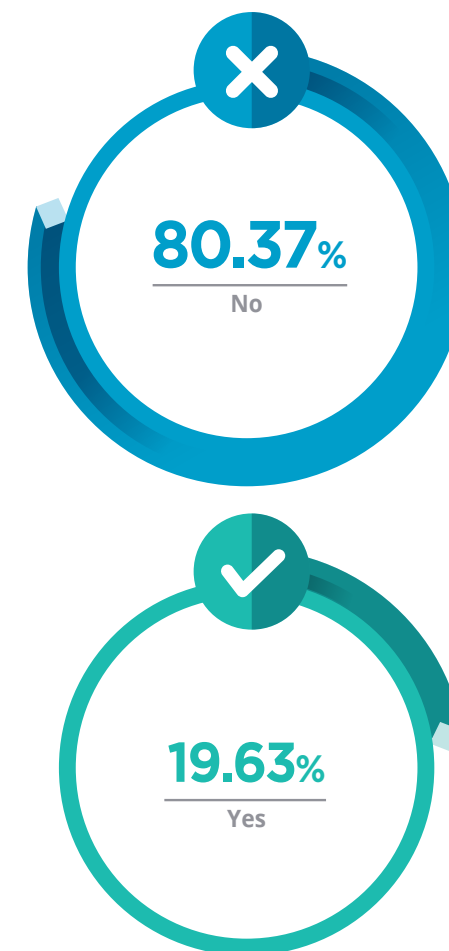
Most respondents (45.94%) do not hire employees, or hire 1 or 2 persons (31.14%).

What are the agricultural activities related to?



The sectors in which in most respondents carry out their activities are **livestock (53.18%)**, **arable crops (47.59%)** and **dairy (44.30%)**.

Is the production certified as organic?



The production of the large majority of the respondents (**80.37%**) is **not certified as organic**, across all the surveyed countries. The only relative exception is Austria where 44.71% of respondents have their produce certified as organic.

Methodology

DATA COLLECTION

Between April and mid-August 2017, a survey was carried out among young farmers under the age of 40 in all 28 EU Member States. It was carried out through a web-based questionnaire which resulted in 978 responses. In order to maximise the response rate the questionnaire was available in English, French, German, Italian, Spanish, Dutch, Polish, Swedish and Danish.

A target number of respondents was set for each Member State according to each country's dimension. It has to be noted that some countries reached their target and even exceeded it. Some countries came close to their target and a few did not take part actively in the survey.

A detailed overview of the results is included in the Annex of the report.

CONTENT OF THE SURVEY

The questionnaire was made up of structured questions with pre-programmed answers to guarantee that all questions were asked in the same way in each country, and to make it possible to analyse the data in a statistically

sound way. The question on the future as young farmer offered the opportunity to provide an explanation to support the given answer.

The questionnaire included a part on sustainable agriculture and one on background information.

The structured questions in the first part of the questionnaire focused on:

- ▶ The needs and investments to develop farms in an economically sustainable way
- ▶ The needs to safeguard the environment through farming practices
- ▶ The benefits to environmental sustainability
- ▶ The lifestyle in a rural community
- ▶ Responsibility for ensuring a sustainable agricultural sector
- ▶ Involvement in a young farmers' organisation
- ▶ Viability of a future as a young farmer
- ▶ Investment in improving animal welfare

The second part of the questionnaire focused on:

- ▶ Gender
- ▶ Age
- ▶ Country
- ▶ Function
- ▶ Size and type of farm
- ▶ Farmland
- ▶ Number of employees
- ▶ Agricultural activities
- ▶ Organic farming

DATA ANALYSIS

This report presents a descriptive quantitative analysis of an EU-wide survey carried out among European young farmers on the sustainability and future of the agricultural sector.

A more in-depth analysis was made of the countries from which a greater number of results was received.



About us

DELAVAL

DeLaval is a full-line supplier to dairy farmers worldwide. The company develops, manufactures and markets equipment and complete systems for milk production and animal husbandry. Service and sales of a wide range of accessories are also key aspects of DeLaval's operations. The company supplies highly efficient system solutions for milking, herd management, animal traffic control, feeding, manure handling, ventilation and energy recovery. Our goal is to reduce the environmental footprint of farms, while improving milk production, farm profitability, and the well-being of the people and animals involved.

CEJA

CEJA – the European Council of Young Farmers – is the voice of Europe's next generation of farmers to the European institutions. CEJA was founded in Rome, Italy, in 1958 through bilateral contacts between young farmers' organisations from the six initial Member States of the European Coal and Steel Community. Today, CEJA is the official umbrella organisation of European young farmers, representing their interests to European institutions and stakeholders. CEJA represents 2 million young farmers in Europe. Membership spans across 24 EU Member States and 31 national member organisations, including an observer member from Serbia.

Acting as a forum for communication and dialogue between young farmers and European decision makers, CEJA's main objective is to promote a younger and innovative agricultural sector across the EU 28 and to create good working and living conditions for young people setting up in farming and those who are already "Young Farmers".

Appendix

What would you need to develop your farm in an economically sustainable way? (Select 3 choices)

ANSWER CHOICES	RESPONSES	UK	NL	DK	FR	DE	IT	PL	ES	SE	IE	BE	FI	MT	SL	AU	SK	PT	LT	EE	LU	BG	HR	CY	CZ	NO MS	
Access to land	50.82%	497	30	55	10	37	51	19	22	42	29	28	35	19	13	20	24	1	2	15	1	1	1	1	0	6	35
Access to credit	28.12%	275	18	17	21	8	16	27	5	34	12	23	13	5	7	9	19	1	2	10	0	2	0	1	1	1	23
Measures facilitating opportunities to invest (e.g. subsidies)	29.96%	293	11	20	3	25	20	36	24	30	16	10	16	6	9	6	20	1	2	14	0	0	1	0	0	3	20
Fair income level	59.20%	579	34	52	11	58	54	31	24	54	26	20	43	22	11	17	69	0	0	10	1	2	0	0	1	2	37
Simplification of administrative procedures	42.43%	415	11	23	16	47	43	35	24	26	29	6	21	11	3	23	48	0	0	10	1	1	1	1	0	6	29
Access to new technology (e.g. automation, machinery, digital)	19.53%	191	14	22	7	12	18	13	6	18	11	5	4	6	2	15	7	1	0	11	0	0	0	0	1	0	18
A better position for young farmers in the food supply chain	25.77%	252	10	25	5	5	33	20	8	20	9	11	11	7	7	17	41	0	1	6	1	0	1	0	0	14	
Fair competition from other global markets	39.47%	386	26	35	10	37	19	27	12	42	43	7	33	10	11	15	25	0	2	5	2	0	1	0	2	20	
Other	4.09%	40	3	6	1	5	1	2	1	1	5	1	1	1	2	3	2	1	0	0	0	0	1	0	1	1	
None of the above	0.61%	6	2	0	0	0	0	0	0	0	0	0	0	0	1	1	0	1	0	0	0	0	0	0	0	1	
TOTAL		978	53	85	28	78	85	70	42	89	60	37	59	29	22	42	85	2	3	27	2	2	2	1	2	7	66

What are the 3 most important on-farm investments you would make to develop your farm in an economically sustainable way? (Select 3 choices)

ANSWER CHOICES	RESPONSES	UK	NL	DK	FR	DE	IT	PL	ES	SE	IE	BE	FI	MT	SL	AU	SK	PT	LT	EE	LU	BG	HR	CY	CZ	NO MS	
Organic farming	15.54%	152	2	8	4	9	7	10	8	24	5	3	5	1	4	11	22	0	1	3	2	0	1	0	1	4	17
Farmland expansion	42.13%	412	26	49	6	30	44	21	26	35	29	19	24	13	6	13	24	1	2	11	1	1	0	0	0	4	27
Knowledge development	38.85%	380	20	42	15	24	35	28	12	27	26	23	20	10	13	11	34	0	0	6	1	0	2	0	1	2	28
New machinery	29.45%	288	12	19	7	18	19	16	25	28	18	9	12	11	6	19	18	1	0	18	0	2	0	1	1	4	24
Digital technology e.g. satellite positioning systems	13.60%	133	6	15	7	11	14	15	6	3	9	6	3	8	0	2	10	0	1	2	0	1	0	0	0	0	14
Marketing	24.64%	241	19	17	3	10	20	21	6	20	10	5	13	6	11	16	35	2	0	8	1	0	0	0	0	2	16
Robotics and automation	20.04%	196	14	29	5	29	27	15	9	6	11	3	13	2	0	4	10	1	0	4	0	2	0	0	0	0	12
Farm management optimisation technology	33.33%	326	17	36	15	26	36	24	6	35	14	15	27	4	6	10	21	0	1	12	1	0	1	0	0	1	18
Product certification and labelling e.g. origin, quality	19.94%	195	7	12	4	20	16	14	7	21	6	2	12	6	9	8	31	0	0	5	0	0a	0	0	2	2	11
Infrastructure improvement	30.57%	299	27	9	7	30	10	23	11	33	14	25	30	12	8	20	17	0	1	5	0	0	2	1	0	2	12
Product expansion	24.85%	243	7	7	4	26	24	23	7	29	25	1	16	10	2	10	28	1	3	6	0	0	0	0	1	0	13
Other	6.65%	65	2	12	7	1	3	0	3	5	12	0	2	4	1	2	5	0	0	1	0	0	0	1	0	0	4
None of the above	0.41%	4	0	0	0	0	0	0	0	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2
TOTAL		978	53	85	28	78	85	70	42	89	60	37	59	29	22	42	85	2	3	27	2	2	2	1	2	7	66

As a European young farmer, what do you need most to enable you to safeguard the environment through farming practices? (Select 3 choices)

ANSWER CHOICES	RESPONSES	UK	NL	DK	FR	DE	IT	PL	ES	SE	IE	BE	FI	MT	SL	AU	SK	PT	LT	EE	LU	BG	HR	CY	CZ	NO MS	
Access to science-based research	26.07%	255	22	18	12	12	21	23	12	15	16	14	11	10	10	4	12	1	1	15	1	0	0	0	1	3	21
Measures that are practical to implement on the ground	68.10%	666	39	68	15	47	67	37	25	49	45	30	43	22	15	28	68	1	2	14	1	2	1	2	5	39	
Coherence between local, national and European measures	45.09%	441	20	41	13	58	22	39	13	53	25	11	36	9	5	17	24	0	1	13	1	1	0	1	0	3	35
Advisory services	24.13%	236	12	8	2	11	22	14	11	28	15	12	12	10	9	21	17	1	2	7	1	2	1	0	1	2	15
Training	29.35%	287	19	9	13	13	23	20	20	27	7	13	17	4	10	14	38	1	1	10	1	0	1	0	1	2	23
Investment support	44.89%	4a39	22	37	9	38	37	28	48	21	19	20	14	9	21	25	0	2	17	1	0	1	0	0	0	3	30
Civil society's recognition of the provision of public goods by farmers	54.81%	536	20	62	16	49	57	36	15	42	47	11	36	16	7	17	65	1	0	4	0	2	1	0	1	3	28
Other	6.54%	64	4	12	2	6	5	3	2	5	4	1	2	1	1	3	5	1	0	1	0	0	0	1	0	0	5
None of the above	1.02%	10	1	0	2	0	1	1	0	0	0	0	1	0	1	1	0	0	0	0	0	0	0	0	0	0	2
TOTAL		978	53	85	28	78	85	70	42	89	60	37	59	29	22	42	85	2	3	27	2	2	2	1	2	7	66

What is the benefit of contributing to environmental sustainability through agricultural practices? (Select 3 choices)

ANSWER CHOICES	RESPONSES	UK	NL	DK	FR	DE	IT	PL	ES	SE	IE	BE	FI	MT	SL	AU	SK	PT	LT	EE	LU	BG	HR	CY	CZ	NO MS
Protected and enhanced natural resources	55.32% 541	40	17	15	46	43	48	22	60	19	22	19	16	14	34	53	2	3	21	1	2	2	1	1	6	34
Sustained biodiversity and ecosystems	60.02% 587	29	43	16	41	46	46	20	61	44	22	28	15	17	25	64	0	3	16	1	2	1	1	2	7	37
Reduction in greenhouse gases	28.02% 274	13	21	10	20	16	19	23	21	10	12	18	8	3	7	30	0	0	11	2	0	0	0	0	2	28
Carbon storage	17.18% 168	6	6	8	24	12	8	2	6	21	9	17	10	3	8	12	0	0	0	1	0	0	0	0	0	15
Climate resilience	24.13% 236	13	26	8	19	16	9	5	24	14	7	19	6	3	14	18	0	2	7	1	0	0	0	2	3	20
Increased production potential	20.65% 202	10	22	6	15	25	10	8	18	10	7	15	11	5	10	13	2	0	1	0	0	1	0	0	0	13
Efficiency improvement	36.30% 355	24	41	7	21	43	33	19	33	18	16	22	8	11	7	21	1	1	12	0	1	1	1	0	0	14
Increased farm revenue	21.47% 210	10	19	7	26	18	16	14	21	9	11	11	5	2	8	13	0	0	5	0	1	1	0	0	0	13
Provision of public goods for civil society	26.48% 259	10	47	5	12	22	18	8	13	27	4	24	6	6	10	20	1	0	4	0	0	0	0	1	3	18
Other	8.90% 87	2	12	1	8	13	2	4	9	8	1	2	1	2	3	10	0	0	3	0	0	0	0	0	0	6
None of the above	1.53% 15	2	1	1	2	1	1	1	1	0	0	2	1	0	0	1	0	0	1	0	0	0	0	0	0	0
TOTAL	978	53	85	28	78	85	70	42	89	60	37	59	29	22	42	85	2	3	27	2	2	2	1	2	7	66

What do you think is necessary to lead a vibrant and sustainable lifestyle in a rural community? (Select 3 choices)

ANSWER CHOICES	RESPONSES	UK	NL	DK	FR	DE	IT	PL	ES	SE	IE	BE	FI	MT	SL	AU	SK	PT	LT	EE	LU	BG	HR	CY	CZ	NO MS
Social services	37.12% 363	9	25	5	27	34	29	7	38	31	16	17	12	12	13	30	0	2	19	0	1	1	1	2	4	28
Education and training opportunities	58.28% 570	30	45	20	41	41	34	28	58	23	18	45	14	19	33	57	1	2	18	1	1	1	0	1	4	35
Widespread fast broadband	41.92% 410	29	46	11	49	54	30	21	22	22	33	8	10	1	5	31	1	0	5	1	2	0	1	0	2	26
Transport connectivity	40.70% 398	15	26	10	21	37	49	14	35	31	17	23	14	9	21	34	0	0	9	1	1	0	1	2	5	23
Leisure facilities	23.93% 234	15	14	5	23	17	8	18	22	10	8	18	7	4	8	25	0	0	10	0	1	1	0	0	2	18
Access to digital technologies	33.23% 325	17	30	13	28	24	26	14	32	25	7	17	11	5	15	17	1	2	4	2	0	2	0	0	1	32
Social opportunities	50.51% 494	38	48	15	30	42	24	22	41	28	11	35	15	15	23	55	2	3	14	1	0	1	0	1	3	27
Other	11.25% 110	5	14	4	12	5	8	2	15	10	1	10	2	1	6	5	0	0	2	0	0	0	0	0	0	8
None of the above	3.07% 30	1	7	1	3	1	2	0	4	0	0	4	2	0	2	1	1	0	0	0	0	0	0	0	0	1
TOTAL	978	53	85	28	78	85	70	42	89	60	37	59	29	22	42	85	2	3	27	2	2	2	1	2	7	66

European young farmers are now faced with the challenges of producing more with less, while also being custodians of the countryside. As a young farmer, do you feel responsible for ensuring a sustainable agriculture sector?

ANSWER CHOICES	RESPONSES	UK	NL	DK	FR	DE	IT	PL	ES	SE	IE	BE	FI	MT	SL	AU	SK	PT	LT	EE	LU	BG	HR	CY	CZ	NO MS
Strongly agree	48.16% 471	31	33	19	39	41	48	11	41	24	18	19	11	14	19	52	2	3	14	1	1	1	1	1	6	21
Agree	41.62% 407	18	41	6	28	43	19	16	39	28	16	32	15	6	20	30	0	0	11	1	1	1	0	0	1	35
Neither agree nor disagree	7.67% 75	2	6	3	11	1	2	11	8	7	1	5	2	1	3	2	0	0	2	0	0	0	0	1	0	7
Disagree	2.15% 21	2	5	0	0	0	0	3	1	1	2	2	1	1	0	1	0	0	0	0	0	0	0	0	0	2
Strongly disagree	0.41% 4	0	0	0	0	0	1	1	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	1
TOTAL	978	53	85	28	78	85	70	42	89	60	37	59	29	22	42	85	2	3	27	2	2	2	1	2	7	66

Are you involved in a young farmers' organisation?

ANSWER CHOICES	RESPONSES	UK	NL	DK	FR	DE	IT	PL	ES	SE	IE	BE	FI	MT	SL	AU	SK	PT	LT	EE	LU	BG	HR	CY	CZ	NO MS
Yes	64.62% 632	33	66	17	66	39	61	11	62	26	32	49	20	13	20	53	2	3	17	1	2	0	1	0	4	34
No	35.38% 346	20	19	11	12	46	9	31	27	34	5	10	9	9	22	32	0	0	10	1	0	2	0	2	3	32
TOTAL	978	53	85	28	78	85	70	42	89	60	37	59	29	22	42	85	2	3	27	2	2	2	1	2	7	66

European farming today involves many demands and pressures, both professionally and personally, for farmers. In consideration of this, is your future as a young farmer viable?

ANSWER CHOICES	RESPONSES	UK	NL	DK	FR	DE	IT	PL	ES	SE	IE	BE	FI	MT	SL	AU	SK	PT	LT	EE	LU	BG	HR	CY	CZ	NO MS
Very likely	20.86% 204	17	32	10	11	20	4	3	14	15	12	9	7	1	9	12	2	0	9	0	1	0	1	0	4	11
Somewhat likely	40.90% 400	21	27	12	48	30	35	14	31	27	16	21	15	5	14	38	0	1	8	2	1	1	0	1	1	31
Neutral	19.33% 189	7	13	6	8	24	12	8	15	10	5	12	3	5	16	21	0	2	4	0	0	1	0	1	1	15
Somewhat unlikely	15.54% 152	6	12	0	7	10	16	15	25	5	4	15	4	6	3	12	0	0	4	0	0	0	0	0	1	7
Very unlikely	3.37% 33	2	1	0	6	1	3	2	4	3	0	2	0	5	0	2	0	0	2	0	0	0	0	0	0	2
TOTAL	978	53	85	28	80	85	70	42	89	60	37	59	29	22	42	85	2	3	27	2	2	2	1	2	7	66

Do you think investment in improving animal welfare on your farm is necessary to increase the profitability and sustainability of your farm?

ANSWER CHOICES	RESPONSES	UK	NL	DK	FR	DE	IT	PL	ES	SE	IE	BE	FI	MT	SL	AU	SK	PT	LT	EE	LU	BG	HR	CY	CZ	NO MS
Strongly agree	34.32% 302	21	13	9	27	20	37	20	28	22	14	12	4	9	16	18	2	0	6	1	0	0	0	1	2	20
Agree	38.41% 338	16	22	11	31	30	25	16	31	23	11	23	6	5	22	22	0	2	11	0	2	2	0	0	4	23
Neither agree nor disagree	18.30% 161	8	23	5	12	15	4	0	19	6	7	13	10	4	1	13	0	1	4	1	0	0	0	1	0	14
Disagree	7.73% 68	1	11	1	3	10	1	2	1	5	4	5	1	0	1	15	0	0	2	0	0	0	0	0	1	4
Strongly disagree	2.39% 21	2	3	1	1	2	0	1	2	2	0	1	0	0	0	6	0	0	0	0	0	0	0	0	0	0
TOTAL	962	53	85	28	78	85	67	42	89	60	37	59	21	22	42	85	2	3	27	2	2	2	1	2	7	61

Gender

ANSWER CHOICES	RESPONSES	UK	NL	DK	FR	DE	IT	PL	ES	SE	IE	BE	FI	MT	SL	AU	SK	PT	LT	EE	LU	BG	HR	CY	CZ	NO MS
Female	27.41% 250	14	18	3	12	18	21	8	30	19	5	20	10	4	15	33	1	3	8	2	0	2	0	1	3	
Male	72.59% 662	39	67	25	66	67	49	34	59	41	32	39	19	18	27	52	1	0	19	0	2	0	1	1	4	
TOTAL	912	53	85	28	78	85	70	42	89	60	37	59	29	22	42	85	2	3	27	2	2	2	1	2	7	

Age

ANSWER CHOICES	RESPONSES	UK	NL	DK	FR	DE	IT	PL	ES	SE	IE	BE	FI	MT	SL	AU	SK	PT	LT	EE	LU	BG	HR	CY	CZ	NO MS
18-25	33.88% 309	13	43	12	24	33	13	12	17	19	10	32	3	7	8	50	0	0	9	0	1	0	0	1	2	
26-30	27.85% 254	16	18	13	21	31	19	10	17	12	10	13	15	7	17	25	0	0	8	2	0	0	0	0	0	
31-35	21.82% 199	11	14	3	27	13	24	10	20	19	11	10	7	4	8	6	1	1	8	0	0	0	1	0	1	
36-40	16.45% 150	13	10	0	6	8	14	10	35	10	6	4	4	4	9	4	1	2	2	0	1	2	0	1	4	
TOTAL	912	53	85	28	78	85	70	42	89	60	37	59	29	22	42	85	2	3	27	2	2	2	1	2	7	

Function

ANSWER CHOICES	RESPONSES	UK	NL	DK	FR	DE	IT	PL	ES	SE	IE	BE	FI	MT	SL	AU	SK	PT	LT	EE	LU	BG	HR	CY	CZ	NO MS
Owner	53.73% 490	13	51	6	40	42	41	28	64	25	15	18	20	11	35	49	2	1	21	1	1	1	1	0	4	
Partner	21.27% 194	24	10	2	14	16	19	8	10	17	15	15	4	6	3	21	0	2	2	0	0	1	0	2	3	
Manager	8.77% 80	7	7	9	13	11	3	3	7	3	2	8	0	1	2	2	0	0	2	0	0	0	0	0	0	
Employee	16.23% 148	9	17	11	11	16	7	3	8	15	5	18	5	4	2	13	0	0	2	1	1	0	0	0	0	
TOTAL	912	53	85	28	78	85	70	42	89	60	37	59	29	22	42	85	2	3	27	2	2	2	1	2	7	

Do you come from a farming family?

ANSWER CHOICES	RESPONSES	UK	NL	DK	FR	DE	IT	PL	ES	SE	IE	BE	FI	MT	SL	AU	SK	PT	LT	EE	LU	BG	HR	CY	CZ	NO MS
Yes	84.65% 772	45	76	23	62	70	49	37	74	48	35	57	25	18	37	82	1	3	21	2	2	0	0	1	4	
No	15.35% 140	8	9	5	16	15	21	5	15	12	2	2	4	4	5	3	1	0	6	0	0	2	1	1	3	
TOTAL	912	53	85	28	78	85	70	42	89	60	37	59	29	22	42	85	2	3	27	2	2	2	1	2	7	

		What type of farm are you involved in?																								NO MS
ANSWER CHOICES	RESPONSES	UK	NL	DK	FR	DE	IT	PL	ES	SE	IE	BE	FI	MT	SL	AU	SK	PT	LT	EE	LU	BG	HR	CY	CZ	
Family Farm	72.70%	663	40	75	16	50	65	37	30	61	40	32	48	19	17	31	73	1	1	19	2	2	0	0	1	3
Recently installed on an inherited farm	7.35%	67	2	2	0	12	3	11	6	5	7	0	5	5	1	5	2	0	1	0	0	0	0	0	0	0
Started own business	12.83%	117	6	3	5	12	8	17	5	15	7	3	3	3	2	6	8	0	0	7	0	0	2	1	0	4
Other	7.13%	65	5	5	7	4	9	5	1	8	6	2	3	2	2	0	2	1	1	1	0	0	0	0	1	0
TOTAL		912	53	85	28	78	85	70	42	89	60	37	59	29	22	42	85	2	3	27	2	2	2	1	2	7
		What is the size of the farm? (in hectares)																								NO MS
ANSWER CHOICES	RESPONSES	UK	NL	DK	FR	DE	IT	PL	ES	SE	IE	BE	FI	MT	SL	AU	SK	PT	LT	EE	LU	BG	HR	CY	CZ	
<2	4.06%	37	1	4	0	0	1	0	9	0	0	3	0	14	1	0	0	1	0	0	0	1	0	0	2	
2-10	9.65%	88	1	1	0	1	3	15	7	6	1	3	5	2	7	15	10	0	2	5	0	0	1	1	0	2
10-30	13.82%	126	2	5	2	1	3	16	10	25	1	4	4	0	1	17	26	1	0	5	0	0	0	0	1	2
30-50	16.34%	149	5	23	1	7	11	12	9	13	5	9	11	7	0	5	24	1	0	5	0	0	0	0	1	
50-100	25.88%	236	10	29	5	27	30	11	11	19	16	11	28	10	0	2	20	0	0	5	1	0	0	0	1	0
100-200	19.74%	180	19	15	7	38	23	9	4	7	21	9	8	9	0	2	4	0	0	3	0	2	0	0	0	0
>200	10.53%	96	15	8	13	4	15	6	1	10	16	1	0	1	0	0	1	0	0	4	1	0	0	0	0	0
TOTAL		912	53	85	28	78	85	70	42	89	60	37	59	29	22	42	85	2	3	27	2	2	2	1	2	7
		Is the farmland owned or rented?																								NO MS
ANSWER CHOICES	RESPONSES	UK	NL	DK	FR	DE	IT	PL	ES	SE	IE	BE	FI	MT	SL	AU	SK	PT	LT	EE	LU	BG	HR	CY	CZ	
Bought	32.24%	294	17	65	11	4	6	28	26	28	6	15	30	5	5	19	11	1	2	8	1	0	1	1	1	3
Rented	11.84%	108	6	3	3	15	3	11	2	18	9	4	4	2	13	4	7	0	0	3	0	0	0	0	0	1
Both	55.92%	510	30	17	14	59	76	31	14	43	45	18	25	22	4	19	67	1	1	16	1	2	1	0	1	3
TOTAL		912	53	85	28	78	85	70	42	89	60	37	59	29	22	42	85	2	3	27	2	2	2	1	2	7
		How many employees does the farm employ?																								NO MS
ANSWER CHOICES	RESPONSES	UK	NL	DK	FR	DE	IT	PL	ES	SE	IE	BE	FI	MT	SL	AU	SK	PT	LT	EE	LU	BG	HR	CY	CZ	
None	45.94%	419	15	44	5	48	27	18	24	39	19	21	41	10	16	23	46	0	0	13	1	1	1	0	1	6
1-2	31.14%	284	22	22	7	19	30	24	13	23	18	13	16	17	4	13	26	0	3	11	0	1	1	0	0	0
2-5	16.23%	148	9	18	10	8	19	18	4	16	18	3	2	1	1	5	11	0	0	2	1	0	0	0	1	1
5-10	3.29%	30	2	0	4	3	1	4	0	7	3	0	0	1	1	1	2	0	0	0	0	0	1	0	0	
10-20	1.86%	17	4	1	2	0	1	4	1	1	0	0	0	0	0	0	0	1	0	1	0	0	0	0	0	
>20	1.54%	14	1	0	0	0	7	2	0	3	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
TOTAL		912	53	85	28	78	85	70	42	89	60	37	59	29	22	42	85	2	3	27	2	2	2	1	2	7
		What are the agricultural activities related to? (multiple choice)																								NO MS
ANSWER CHOICES	RESPONSES	UK	NL	DK	FR	DE	IT	PL	ES	SE	IE	BE	FI	MT	SL	AU	SK	PT	LT	EE	LU	BG	HR	CY	CZ	
Fruits & Vegetables	18.20%	166	6	10	2	5	14	20	5	27	1	1	7	7	15	16	11	1	0	8	0	0	2	1	1	6
Wine	5.04%	46	1	0	0	1	1	10	0	10	0	0	0	0	6	10	5	0	0	0	0	0	0	0	0	2
Arable crops	47.59%	434	8	39	19	36	70	39	20	43	30	3	37	19	10	5	37	0	2	12	1	2	0	0	0	2
Dairy	44.30%	404	32	47	10	50	48	18	22	13	41	22	33	9	4	8	36	1	0	6	0	2	0	0	0	2
Livestock	53.18%	485	32	51	17	38	53	22	19	45	28	27	45	10	7	22	50	1	0	12	2	1	0	0	0	3
Forestry	15.79%	144	1	1	2	3	14	5	3	4	27	2	1	16	0	18	43	0	2	1	1	0	0	0	0	
Bioenergy	5.37%	49	2	2	2	23	3	1	4	2	0	1	0	0	2	5	0	0	0	0	0	0	0	0	0	
Agritourism	7.02%	64	3	5	1	4	4	5	4	10	2	1	5	2	2	7	6	0	0	1	1	0	0	0	0	1
Other	10.31%	94	2	7	4	13	4	12	2	9	10	1	6	4	0	7	6	1	2	1	0	0	0	0	0	2
TOTAL		912	53	85	28	78	85	70	42	89	60	37	59	29	22	42	85	2	3	27	2	3	2	1	1	7
		Is the production certified as organic?																								NO MS
ANSWER CHOICES	RESPONSES	UK	NL	DK	FR	DE	IT	PL	ES	SE	IE	BE	FI	MT	SL	AU	SK	PT	LT	EE	LU	BG	HR	CY	CZ	
Yes	19.63%	179	4	6	2	9	13	23	2	31	17	0	7	4	0	13	38	0	1	3	2	0	1	0	1	2
No	80.37%	733	49	79	26	69	72	47	40	58	43	37	52	25	22	29	47	2	2	24	0	2	1	1	1	5
TOTAL		912	53	85	28	78	85	70	42	89	60	37	59	29	22	42	85	2	3	27	2	2	2	1	2	7

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