BASF Farm Perspectives Study Europe Results

Thomas Schäfer
Director Business Development, Synovate

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Methodology

- 300 Farmers per country:
  ~ producing crops or crops + livestock
  ~ larger farms tend to be overrepresented
- Telephone interviews (avg. 30 min.)

- 1,000 Consumers per country:
  ~ higher education levels tend to be overrepresented.
- Online / internet survey (avg. 20 min.)

➤ The survey was carried out between June and July 2011.
Farming as a vocation

I regard myself/ farmers as a **STEWARD** of the land.

I regard myself/ farmers as a **PROVIDER**.

I regard myself/ farmers as a **BUSINESS PERSON**.

I regard myself/ farmers as the **backbone of my rural community**.

Results in %: Base: 300 (Farmers)/ 1,000 (Consumers)

**Question P3(F):** Now I will read out different statements describing how you see yourself.

**Question P3(C):** To which degree do you agree or disagree with the following statements?

Scale: 5=I totally agree, 1=I totally disagree
Satisfaction among farmers

Satisfaction with current situation as a farmer

- Don’t know: 6%
- Not satisfied at all (1): 27%
- Not really satisfied (2): 55%
- Satisfied (3): 32%
- Very satisfied (4): 39%
- Totally satisfied (5): 28%

Results in %
Base: All farmers, n=300 per country
Question P1: Now I would like to ask you to let me know if and to what degree you are satisfied with your current situation as a farmer. Please take into account all factors influencing your daily work. How satisfied are you with your current situation as a farmer?
Farmers and their position in society

Results in %
Base: All consumers, n=1,000 per country
Question P2: To which degree do you agree or disagree with the following statements about farmers’ situation and their role in society?
Scale: 5=I totally agree, 1=I totally disagree

Germany
France
Spain

Results in %
Farmers: Farmers are respected
Consumers: I have respect for farmers
Consumers: Farmers are well respected by society in my country

Agreement (Top-2)
Interest high, understanding low

How interested are you in issues concerning farming and food production?

- France: 10% interested, 36% not interested
- Germany: 8% interested, 31% not interested
- Spain: 7% interested, 25% not interested

I understand enough about farmers’ reality to be able to judge it properly

- France: 7% understanding, 21% do not understand
- Germany: 10% understanding, 20% do not understand
- Spain: 5% understanding, 17% do not understand

av.: 56% interest
av.: 31% understand

Results in %, Base: All consumers, n=1,000 per country

Question A12: How interested are you in issues concerning farming and food production?
Question P6a: To what degree do you agree or disagree to the following statements, which reflect some possible consumer attitudes towards agriculture and farmers.
Farmer and industry

Between the chemical industry and farmers exist cooperative business relations.

Results in %
Base: All farmers, n=300 per country
Question K4: What do you think about the role of different players on the agricultural market? Scale: 5=I totally agree, 1=I totally disagree

Spain
17 (I totally agree) 22 (4) 27 (1) 15 (I totally disagree) 15 (I don’t know) 4 (no answer)

France
11 (I totally agree) 12 (4) 29 (1) 16 (I totally disagree) 24 (I don’t know) 9 (no answer)

Germany
5 (I totally agree) 18 (4) 30 (1) 25 (I totally disagree) 17 (I don’t know) 6 (no answer)
Do you think chemical industrial companies should support farmers more or less or do you think the support is sufficient?

Support farmers

Results in %
Base: All farmers, n=300 per country
Question NI1: Do you think chemical and seed companies should support farmers more or less or do you think the support is sufficient?

Germany
- Don’t know: 11%
- Should support less: 41%
- Support is sufficient: 36%

France
- Don’t know: 4%
- Should support less: 11%
- Support is sufficient: 69%

Spain
- Don’t know: 12%
- Should support less: 83%
How to support farmers

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<thead>
<tr>
<th>Service</th>
<th>DE</th>
<th>FR</th>
<th>ES</th>
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<tbody>
<tr>
<td>More environmentally friendly products</td>
<td>75</td>
<td>66</td>
<td>43</td>
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<tr>
<td>Represent interests of farmers more in public</td>
<td>73</td>
<td>61</td>
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<td>Better environmental advice</td>
<td>65</td>
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<td>Information on agricultural and food industry trends in my country</td>
<td>63</td>
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<td>Product use training</td>
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<td>More immediate consulting of field practices</td>
<td>55</td>
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<td>48</td>
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Results in %
Base: All farmers, n=300 per country

Question NI3: In addition to a sufficient range of effective products for your crops, what do you expect from the chemical and seed industries in order to support you? What could industrial companies provide in order to strengthen you and your farming business?
Price an obstacle on environment

50% of European consumers would not pay more for food produced in an environmentally-friendly way.

50-70% of all European farmers think that consumers are not willing to pay more for (environmentally friendly produced) food.
Farmers' tension

Requirements as Providers

• Securing global food supply

• Supply affordable food for local society while being aware of consumers' concerns and price expectations

Commitment to Land and Community

• Stewardship: Protection of environment

• Backbone of rural community / supporter of rural culture