The BASF Farm Perspectives Study is designed to examine the gap between consumers’ opinions and perceptions on the one hand, and the realities faced by farmers on the other hand. Key focus areas include the profession of farming, ethical aspects of agriculture, food production and consumption as well as sustainability. Insights from this study will guide the Crop Protection division’s strategic decision-making.

In 2011 BASF conducted the Farm Perspectives Study for the first time – showing strong agreement between farmers and consumers. The study was conducted in Germany, France, Spain, India, Brazil and the USA - Main findings: http://www.agro.basf.com/agr/AP-Internet/en/content/news_room/Farm_Perspective_Study/BASF_Farm_Perspectives_Study

In 2014 BASF has commissioned a second wave of a research study to investigate and monitor current perceptions and attitudes about agriculture among farmers and consumers in Germany, France, Spain, India, Brazil, the USA and China. Additional topics in 2014: sustainability, agricultural regulations, food issues, technology in agriculture and food waste.

Note: As this study is the second wave of research, it is also important to identify possible changes in farmers and consumers’ perceptions and opinions. Where these do occur, the study seeks to obtain an indication of possible reasons or triggers for such changes.

This report provides an overview of the study’s findings in 2014 with comparisons, where appropriate, with the findings obtained in 2011.
Objective: Examine the gap between consumers’ opinions and perceptions on the one hand, and the realities faced by farmers on the other hand

- USA
- Brazil
- Spain
- France
- Germany
- India
- China (2014 only)

**Consumers - 1,000 consumers / country**
- Online questionnaire
- 20 min length
- anonymously

**Farmers - 300 farmers / country**
- Telephone interviews (India & China face-to-face interviews)
- 20 min length
- anonymously
Relevance of Farming & its Perception
P1 (F/C): How satisfied are you with your current situation as a farmer / with the way farming is conducted in your country? [5=totally satisfied … 1=not at all satisfied]

![Satisfaction with Farming Chart]

**Farmers**
- 2011:
  - Totally satisfied: 43% (38%)
  - Very satisfied: 12% (38%)
  - Satisfied: 7% (38%)
  - Not really satisfied: 23% (38%)
  - Not satisfied at all: 15% (38%)

- 2014:
  - Totally satisfied: 25% (34%)
  - Very satisfied: 42% (24%)
  - Satisfied: 9% (34%)
  - Not really satisfied: 19% (34%)
  - Not satisfied at all: 3% (34%)

**Consumers**
- 2011:
  - Totally satisfied: 39% (37%)
  - Very satisfied: 31% (37%)
  - Satisfied: 6% (37%)
  - Not really satisfied: 35% (37%)
  - Not satisfied at all: 5% (37%)

- 2014:
  - Totally satisfied: 40% (39%)
  - Very satisfied: 13% (18%)
  - Satisfied: 5% (18%)
  - Not really satisfied: 5% (18%)
  - Not satisfied at all: 4% (18%)

**Base:**
Farmers are providers of food

P3 (F/C): To what extent do you agree or disagree with the following statements? [5=totally agree … 1=totally disagree]
Farmers Role in Society

Farmers are stewards of the land

P3 (F/C): To what extent do you agree or disagree with the following statements? [5=totally agree ... 1=totally disagree]
In general, farmers use production methods that are sustainable for the environment

P6 (F/C): To what extent do you agree or disagree with the following statements about farmers as a professional group / about farmer attitudes and behaviour? [5=totally agree ... 1=totally disagree]
Farmer Attitudes & Behavior

**Farmers use pesticides responsibly**

P6 (F/C): To what extent do you agree or disagree with the following statements about farmers as a professional group / about farmer attitudes and behaviour? [5=totally agree ... 1=totally disagree]

Base: 
FARMERS (2014: 2121) 
CONSUMERS (2014: 7233)
Farmers Role in Feeding the World

One of the biggest challenges for farmers is to feed the growing world population.

P8 (F/C): To what extent do you agree or disagree with the following statements regarding the need to feed the entire world / regarding farmers’ role in “feeding the world”, e.g. securing food supply for a growing population? [5=totally agree ... 1=totally disagree]
To what extent do you agree or disagree with the following statements regarding the need to feed the entire world / regarding farmers’ role in “feeding the world”, e.g. securing food supply for a growing population?

[5=totally agree … 1=totally disagree]
P6a (F/C): To what extent do you agree or disagree with the following statements which reflect some possible consumer attitudes towards agriculture and farmers? [5=totally agree … 1=totally disagree]
Role of Technology in Farming
**Technology Perceptions – by country**

---

(very big) benefit

<table>
<thead>
<tr>
<th>Technology Perceptions</th>
<th>FARMERS (2014: 2121)</th>
<th>CONSUMERS (2014: 7233)</th>
<th>Base:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved agricultural machinery</td>
<td>78% (US)</td>
<td>97% (BR)</td>
<td>86% (SP)</td>
</tr>
<tr>
<td>Improved fertilizers</td>
<td>79% (US)</td>
<td>91% (BR)</td>
<td>94% (SP)</td>
</tr>
<tr>
<td>Improved pesticides</td>
<td>81% (US)</td>
<td>80% (BR)</td>
<td>97% (SP)</td>
</tr>
<tr>
<td>Genetically modified crops</td>
<td>63% (US)</td>
<td>70% (BR)</td>
<td>78% (SP)</td>
</tr>
<tr>
<td>*GMO in USA</td>
<td>29% (US)</td>
<td>37% (BR)</td>
<td>24% (SP)</td>
</tr>
<tr>
<td>Precision farming</td>
<td>79% (US)</td>
<td>89% (BR)</td>
<td>96% (SP)</td>
</tr>
</tbody>
</table>

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**EG1 (F/C): In your opinion, to what degree will the following developments benefit agriculture? [5=very big benefit … 1=no benefit at all]**
General Attitudes Towards Food, Nutrition & Lifestyle
A2 (F/C): When buying food such as vegetables, fruit, cereals/grains…how important are the following aspects to you? [5=very important … 1=not important at all]
AQ1 (F/C): What do you associate spontaneously with ‘sustainability’ in agriculture? What does it mean for you?

**FARMERS vs. CONSUMERS**

**GLOBAL RESULTS**

- **Soil protection**: 40% (FARMERS) vs. 6% (CONSUMERS)
- **Healthy food**: 23% (FARMERS) vs. 9% (CONSUMERS)
- **Land use**: 27% (FARMERS) vs. 4% (CONSUMERS)
- **Water use**: 27% (FARMERS) vs. 1% (CONSUMERS)
- **Fair farm wages**: 25% (FARMERS) vs. 3% (CONSUMERS)
- **Biodiversity protection and enhancement**: 25% (FARMERS) vs. 3% (CONSUMERS)
- **Environmentally friendly**: 6% (FARMERS) vs. 22% (CONSUMERS)
- **Lower resource consumption**: 22% (FARMERS) vs. 4% (CONSUMERS)
- **Ability to produce sufficient food to feed the world population**: 5% (FARMERS) vs. 18% (CONSUMERS)
- **Reduced emissions**: 16% (FARMERS) vs. 0% (CONSUMERS)
- **Future marketability**: 12% (FARMERS) vs. 1% (CONSUMERS)
- **Reduced usage of chemical products**: 3% (FARMERS) vs. 10% (CONSUMERS)
- **Good worker conditions**: 12% (FARMERS) vs. 1% (CONSUMERS)

FARMERS on average 2.6 mentions vs. CONSUMERS on average 1.2 mentions.
AQ1 (F/C): What do you associate spontaneously with ‘sustainability’ in agriculture? What does it mean for you?

FARMERS vs. CONSUMERS
GLOBAL RESULTS

**Farmers**
- 2% Biological/Organic farming
- 1% Ability to produce good quality food
- 4% Modern technology/innovations
- 2% Produce in a cost efficient way
- 1% Support from the Government
- 1% Improved lifestyle
- 0% No genetically modified crops
- 2% Availability of energy sources (diesel/electricity)
- 0% Regional/local production
- 0% Food durability (long shelf life)
- 6% Other
- 7% Don't know

**Consumers**
- 7% Biological/Organic farming
- 6% Ability to produce good quality food
- 3% Modern technology/innovations
- 3% Produce in a cost efficient way
- 2% Support from the Government
- 2% Improved lifestyle
- 2% No genetically modified crops
- 2% Availability of energy sources (diesel/electricity)
- 1% Regional/local production
- 1% Food durability (long shelf life)
- 6% Other
- 19% Don't know

On average 2.6 mentions for farmers and 1.2 mentions for consumers.
AQ1 (F/C): What do you associate spontaneously with ‘sustainability’ in agriculture? What does it mean for you?

**Sustainability Understanding – by country (1/2)**

<table>
<thead>
<tr>
<th>FARMERS</th>
<th>CONSUMERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>US</td>
<td>BR</td>
</tr>
<tr>
<td>Soil protection</td>
<td>15%</td>
</tr>
<tr>
<td>Healthy food</td>
<td>14%</td>
</tr>
<tr>
<td>Land use</td>
<td>8%</td>
</tr>
<tr>
<td>Water use</td>
<td>9%</td>
</tr>
<tr>
<td>Fair farm wages</td>
<td>28%</td>
</tr>
<tr>
<td>Biodiversity protection and enhancement</td>
<td>3%</td>
</tr>
<tr>
<td>Environmentally friendly</td>
<td>1%</td>
</tr>
<tr>
<td>Lower resource consumption</td>
<td>3%</td>
</tr>
<tr>
<td>Ability to produce sufficient food to feed the world population</td>
<td>4%</td>
</tr>
<tr>
<td>Reduced emissions</td>
<td>1%</td>
</tr>
<tr>
<td>Future marketability</td>
<td>3%</td>
</tr>
<tr>
<td>Reduced usage of chemical products</td>
<td>7%</td>
</tr>
<tr>
<td>Good worker conditions</td>
<td>2%</td>
</tr>
</tbody>
</table>

**average # of mentions**

FARMERS: 1.2, 1.0, 3.6, 1.4, 2.8, 5.1, 3.5
CONSUMERS: 1.0, 1.6, 1.2, 1.0, 1.1, 0.9, 1.4

Base:

FARMERS (2014: 2121)
CONSUMERS (2014: 7233)

20
### Sustainability Understanding – by country (2/2)

#### Biological/Organic farming
- **FARMERS**
  - US: 3%
  - BR: 0%
  - SP: 6%
  - FR: 4%
  - GE: 1%
  - IN: 0%
  - CH: 0%
- **CONSUMERS**
  - US: 1%
  - BR: 0%
  - SP: 9%
  - FR: 4%
  - GE: 0%
  - IN: 3%
  - CH: 6%

#### Ability to produce good quality food
- **FARMERS**
  - US: 5%
  - BR: 9%
  - SP: 6%
  - FR: 4%
  - GE: 0%
  - IN: 3%
  - CH: 3%
- **CONSUMERS**
  - US: 2%
  - BR: 13%
  - SP: 5%
  - FR: 0%
  - GE: 0%
  - IN: 9%
  - CH: 3%

#### Modern technology/innovations
- **FARMERS**
  - US: 1%
  - BR: 2%
  - SP: 13%
  - FR: 0%
  - GE: 0%
  - IN: 4%
  - CH: 1%
- **CONSUMERS**
  - US: 1%
  - BR: 2%
  - SP: 3%
  - FR: 0%
  - GE: 0%
  - IN: 1%
  - CH: 2%

#### Produce in a cost efficient way
- **FARMERS**
  - US: 1%
  - BR: 5%
  - SP: 10%
  - FR: 0%
  - GE: 0%
  - IN: 8%
  - CH: 13%
- **CONSUMERS**
  - US: 2%
  - BR: 0%
  - SP: 0%
  - FR: 0%
  - GE: 2%
  - IN: 1%
  - CH: 2%

#### Support from the Government
- **FARMERS**
  - US: 0%
  - BR: 2%
  - SP: 0%
  - FR: 0%
  - GE: 0%
  - IN: 0%
  - CH: 0%
- **CONSUMERS**
  - US: 1%
  - BR: 5%
  - SP: 0%
  - FR: 0%
  - GE: 0%
  - IN: 0%
  - CH: 0%

#### Improved lifestyle
- **FARMERS**
  - US: 0%
  - BR: 1%
  - SP: 2%
  - FR: 0%
  - GE: 0%
  - IN: 0%
  - CH: 0%
- **CONSUMERS**
  - US: 2%
  - BR: 1%
  - SP: 2%
  - FR: 0%
  - GE: 0%
  - IN: 0%
  - CH: 0%

#### No genetically modified crops
- **FARMERS**
  - US: 1%
  - BR: 2%
  - SP: 0%
  - FR: 0%
  - GE: 0%
  - IN: 0%
  - CH: 0%
- **CONSUMERS**
  - US: 2%
  - BR: 0%
  - SP: 0%
  - FR: 0%
  - GE: 0%
  - IN: 0%
  - CH: 0%

#### Availability of energy sources (diesel/electricity)
- **FARMERS**
  - US: 0%
  - BR: 0%
  - SP: 0%
  - FR: 0%
  - GE: 0%
  - IN: 0%
  - CH: 0%
- **CONSUMERS**
  - US: 2%
  - BR: 0%
  - SP: 0%
  - FR: 0%
  - GE: 0%
  - IN: 0%
  - CH: 0%

#### Regional/local production
- **FARMERS**
  - US: 0%
  - BR: 0%
  - SP: 0%
  - FR: 0%
  - GE: 0%
  - IN: 0%
  - CH: 0%
- **CONSUMERS**
  - US: 3%
  - BR: 0%
  - SP: 0%
  - FR: 0%
  - GE: 0%
  - IN: 0%
  - CH: 0%

#### Food durability (long shelf life)
- **FARMERS**
  - US: 3%
  - BR: 0%
  - SP: 0%
  - FR: 0%
  - GE: 1%
  - IN: 1%
  - CH: 1%
- **CONSUMERS**
  - US: 0%
  - BR: 0%
  - SP: 0%
  - FR: 0%
  - GE: 0%
  - IN: 0%
  - CH: 0%

#### Other
- **FARMERS**
  - US: 7%
  - BR: 11%
  - SP: 2%
  - FR: 4%
  - GE: 10%
  - IN: 10%
  - CH: 9%
- **CONSUMERS**
  - US: 5%
  - BR: 9%
  - SP: 4%
  - FR: 2%
  - GE: 1%
  - IN: 0%
  - CH: 3%

#### Don’t know
- **FARMERS**
  - US: 13%
  - BR: 12%
  - SP: 9%
  - FR: 17%
  - GE: 3%
  - IN: 20%
  - CH: 32%
- **CONSUMERS**
  - US: 27%
  - BR: 9%
  - SP: 9%
  - FR: 27%
  - GE: 3%
  - IN: 20%
  - CH: 7%

### Average # of mentions
- **FARMERS**
  - Biological/Organic farming: 1.2
  - Ability to produce good quality food: 1.0
  - Modern technology/innovations: 3.6
  - Produce in a cost efficient way: 1.4
  - Support from the Government: 2.8
  - Improved lifestyle: 5.1
  - No genetically modified crops: 3.5
- **CONSUMERS**
  - Biological/Organic farming: 1.0
  - Ability to produce good quality food: 1.6
  - Modern technology/innovations: 1.2
  - Produce in a cost efficient way: 1.0
  - Support from the Government: 1.1
  - Improved lifestyle: 0.9
  - No genetically modified crops: 1.4

AQ1 (F/C): What do you associate spontaneously with ‘sustainability’ in agriculture? What does it mean for you?
Agricultural Regulations & Future Consequences
AQ3 (F/C): Thinking now about the regulations currently affecting agricultural production in [country], which of the following statements best reflects your opinion?

**FARMERS vs. CONSUMERS**

**GLOBAL RESULTS**

- 49%: there are currently too many regulations applied to the agricultural sector
- 27%: current regulations affecting agriculture strike the right balance
- 23%: there is not enough regulation in the agricultural sector
- 21%: don’t know
- 23%: don’t know
- 38%: don’t know
- 17%: don’t know

**Base:**
- FARMERS (2014: 2121)
- CONSUMERS (2014: 7233)
AQ3 (F/C): Thinking now about the regulations currently affecting agricultural production in [country], which of the following statements best reflects your opinion?

- there are currently too many regulations applied to the agricultural sector
- current regulations affecting agriculture strike the right balance
- there is not enough regulation in the agricultural sector
- don’t know
Future Challenges
F1 (F): What do you think will be the most important trends for agriculture in your country for the next 5 years? What is likely to change?

<table>
<thead>
<tr>
<th>Trend</th>
<th>US</th>
<th>BR</th>
<th>SP</th>
<th>FR</th>
<th>DE</th>
<th>IN</th>
<th>CH</th>
</tr>
</thead>
<tbody>
<tr>
<td>Small farmers will disappear</td>
<td>14%</td>
<td>3%</td>
<td>31%</td>
<td>19%</td>
<td>37%</td>
<td>42%</td>
<td>25%</td>
</tr>
<tr>
<td>Tougher regulations</td>
<td>12%</td>
<td>5%</td>
<td>48%</td>
<td>4%</td>
<td>29%</td>
<td>29%</td>
<td>12%</td>
</tr>
<tr>
<td>Improvements in technology</td>
<td>9%</td>
<td>1%</td>
<td>51%</td>
<td>1%</td>
<td>15%</td>
<td>15%</td>
<td>16%</td>
</tr>
<tr>
<td>Water shortages</td>
<td>15%</td>
<td>7%</td>
<td>21%</td>
<td>22%</td>
<td>19%</td>
<td>14%</td>
<td>68%</td>
</tr>
<tr>
<td>More sustainable agriculture</td>
<td>9%</td>
<td>9%</td>
<td>32%</td>
<td>2%</td>
<td>20%</td>
<td>52%</td>
<td>14%</td>
</tr>
<tr>
<td>Climate change</td>
<td>4%</td>
<td>4%</td>
<td>5%</td>
<td>2%</td>
<td>31%</td>
<td>44%</td>
<td>15%</td>
</tr>
<tr>
<td>Labor shortages</td>
<td>3%</td>
<td>2%</td>
<td>4%</td>
<td>2%</td>
<td>22%</td>
<td>43%</td>
<td>26%</td>
</tr>
<tr>
<td>Better prices for farmers</td>
<td>4%</td>
<td>1%</td>
<td>12%</td>
<td>2%</td>
<td>9%</td>
<td>43%</td>
<td>16%</td>
</tr>
<tr>
<td>Improved seed quality</td>
<td>1%</td>
<td>3%</td>
<td>18%</td>
<td>2%</td>
<td>2%</td>
<td>19%</td>
<td>15%</td>
</tr>
<tr>
<td>Less reliance on agrochemicals</td>
<td>3%</td>
<td>1%</td>
<td>27%</td>
<td>22%</td>
<td>21%</td>
<td>19%</td>
<td>15%</td>
</tr>
<tr>
<td>Less subsidies</td>
<td>1%</td>
<td>3%</td>
<td>31%</td>
<td>1%</td>
<td>10%</td>
<td>27%</td>
<td>3%</td>
</tr>
<tr>
<td>More organic farming</td>
<td>7%</td>
<td>2%</td>
<td>24%</td>
<td>9%</td>
<td>14%</td>
<td>28%</td>
<td>7%</td>
</tr>
<tr>
<td>Higher input costs</td>
<td>6%</td>
<td>2%</td>
<td>7%</td>
<td>3%</td>
<td>16%</td>
<td>34%</td>
<td>13%</td>
</tr>
<tr>
<td>New pesticides</td>
<td>4%</td>
<td>3%</td>
<td>6%</td>
<td>3%</td>
<td>4%</td>
<td>39%</td>
<td>7%</td>
</tr>
<tr>
<td>Increased global demand for food</td>
<td>5%</td>
<td>1%</td>
<td>3%</td>
<td>3%</td>
<td>14%</td>
<td>39%</td>
<td>10%</td>
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<tr>
<td>Increased oil prices</td>
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<td>2%</td>
<td>0%</td>
<td>1%</td>
<td>0%</td>
<td>3%</td>
<td>10%</td>
</tr>
<tr>
<td>Greater use of agrochemicals</td>
<td>2%</td>
<td>0%</td>
<td>15%</td>
<td>0%</td>
<td>6%</td>
<td>13%</td>
<td>6%</td>
</tr>
<tr>
<td>More transparency for consumers</td>
<td>10%</td>
<td>0%</td>
<td>25%</td>
<td>2%</td>
<td>8%</td>
<td>18%</td>
<td>4%</td>
</tr>
<tr>
<td>The food chain will become shorter</td>
<td>1%</td>
<td>0%</td>
<td>12%</td>
<td>2%</td>
<td>4%</td>
<td>4%</td>
<td>2%</td>
</tr>
<tr>
<td>More GM (genetically modified) food</td>
<td>10%</td>
<td>8%</td>
<td>5%</td>
<td>1%</td>
<td>7%</td>
<td>7%</td>
<td>2%</td>
</tr>
</tbody>
</table>

Base: FARMERS (2014: 2121)
### Important trends for the next 5 years – by country (2/2)

**US**

- More subsidies: 1%
- More difficult to obtain a fair price/make profit: 2%
- Improved crop quality/higher produce: 2%
- Fewer regulatory constraints: 3%
- Shift towards no-till farming: 3%
- More farmer associations/cooperatives: 1%
- Improved crop quality/higher produce: 1%
- Precision farming: 1%
- Fewer land will be available: 1%
- Increased export: 1%
- Lower input costs: 1%
- Shift in crops cultivated: 1%
- Less livestock/Dairy: 1%
- More respect for farmers: 1%
- Better logistics: 3%
- More support from the Government: 1%
- Less organic farming: 1%
- Higher number of farmers: 1%
- Less GM (genetically modified) food: 1%
- other: 3%
don't know: 9%

**BR**

- More subsidies: 11%
- More difficult to obtain a fair price/make profit: 1%
- Improved crop quality/higher produce: 13%
- Fewer regulatory constraints: 7%
- Shift towards no-till farming: 1%
- More farmer associations/cooperatives: 8%
- Improved crop quality/higher produce: 1%
- Precision farming: 6%
- Fewer land will be available: 1%
- Increased export: 4%
- Lower input costs: 1%
- Shift in crops cultivated: 1%
- Less livestock/Dairy: 2%
- More respect for farmers: 1%
- Better logistics: 1%
- More support from the Government: 1%
- Less organic farming: 1%
- Higher number of farmers: 1%
- Less GM (genetically modified) food: 1%
- other: 2%
don't know: 2%

**SP**

- More subsidies: 1%
- More difficult to obtain a fair price/make profit: 6%
- Improved crop quality/higher produce: 7%
- Fewer regulatory constraints: 4%
- Shift towards no-till farming: 3%
- More farmer associations/cooperatives: 1%
- Improved crop quality/higher produce: 1%
- Precision farming: 5%
- Fewer land will be available: 1%
- Increased export: 1%
- Lower input costs: 1%
- Shift in crops cultivated: 2%
- Less livestock/Dairy: 1%
- More respect for farmers: 1%
- Better logistics: 1%
- More support from the Government: 1%
- Less organic farming: 1%
- Higher number of farmers: 1%
- Less GM (genetically modified) food: 1%
- other: 7%
don't know: 13%

**FR**

- More subsidies: 1%
- More difficult to obtain a fair price/make profit: 6%
- Improved crop quality/higher produce: 2%
- Fewer regulatory constraints: 1%
- Shift towards no-till farming: 3%
- More farmer associations/cooperatives: 1%
- Improved crop quality/higher produce: 1%
- Precision farming: 1%
- Fewer land will be available: 1%
- Increased export: 5%
- Lower input costs: 1%
- Shift in crops cultivated: 1%
- Less livestock/Dairy: 1%
- More respect for farmers: 1%
- Better logistics: 1%
- More support from the Government: 1%
- Less organic farming: 1%
- Higher number of farmers: 1%
- Less GM (genetically modified) food: 1%
- other: 12%
don't know: 1%

**DE**

- More subsidies: 4%
- More difficult to obtain a fair price/make profit: 7%
- Improved crop quality/higher produce: 2%
- Fewer regulatory constraints: 1%
- Shift towards no-till farming: 1%
- More farmer associations/cooperatives: 1%
- Improved crop quality/higher produce: 1%
- Precision farming: 1%
- Fewer land will be available: 2%
- Increased export: 1%
- Lower input costs: 1%
- Shift in crops cultivated: 1%
- Less livestock/Dairy: 1%
- More respect for farmers: 1%
- Better logistics: 1%
- More support from the Government: 1%
- Less organic farming: 1%
- Higher number of farmers: 1%
- Less GM (genetically modified) food: 1%
- other: 6%
don't know: 1%

**IN**

- More subsidies: 20%
- More difficult to obtain a fair price/make profit: 1%
- Improved crop quality/higher produce: 1%
- Fewer regulatory constraints: 1%
- Shift towards no-till farming: 1%
- More farmer associations/cooperatives: 1%
- Improved crop quality/higher produce: 1%
- Precision farming: 1%
- Fewer land will be available: 1%
- Increased export: 1%
- Lower input costs: 1%
- Shift in crops cultivated: 1%
- Less livestock/Dairy: 1%
- More respect for farmers: 1%
- Better logistics: 1%
- More support from the Government: 1%
- Less organic farming: 1%
- Higher number of farmers: 1%
- Less GM (genetically modified) food: 1%
- other: 1%
don't know: 13%

**CH**

- More subsidies: 20%
- More difficult to obtain a fair price/make profit: 1%
- Improved crop quality/higher produce: 1%
- Fewer regulatory constraints: 1%
- Shift towards no-till farming: 1%
- More farmer associations/cooperatives: 1%
- Improved crop quality/higher produce: 1%
- Precision farming: 1%
- Fewer land will be available: 1%
- Increased export: 1%
- Lower input costs: 1%
- Shift in crops cultivated: 1%
- Less livestock/Dairy: 1%
- More respect for farmers: 1%
- Better logistics: 1%
- More support from the Government: 1%
- Less organic farming: 1%
- Higher number of farmers: 1%
- Less GM (genetically modified) food: 1%
- other: 1%
don't know: 13%

**Base:**

FARMERS (2014: 2121)
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