



NEW COMMON AGRICULTURAL POLICY IMPLEMENTATION IN ROMANIA. POSSIBLE IMPACTS AND TRENDS

GENERAL PERSPECTIVES AND OPTION VALUATION

THIS STUDY WAS CONDUCTED BY **STRATESYS** FOR EU PARLIAMENT
NOVEMBER 2020



AT A GLANCE

THE MAIN CONCLUSIONS OF THE STUDY

- 38% of the farmers are aware of the new CAP policies, with a less awareness among young farmers.
- The larger the farm is, the bigger the awareness regarding CAP policies in general and for each of the policies, in particular. Also, there is a higher interest over CAP policies on farmers that are directly linked to the consumer / integrated production chain.
- The CAP policy directive that farmers are most aware of is PILLAR 2.
- 57% of all farmers are optimistic regarding the new CAP, thus estimating that it's implementation will lead to an increase in their farm performance. The optimism decreases by the increase of the farm size.
- The majority of the farmers want to invest in developing eco-schemes in the near future (next 3-5 years), with a higher tendency on younger farmers and on small sized farms.
- The intention of replacing pesticides and fertilizers with eco-substances decreases by farm size increase.
- 3% of all analysed cultivated area is cultivated with eco crops, representing about 19% of the total number of the respondent farmers. Bigger farms prefer conventional farming.
- Farmers part of an integrated producer chain opt more for a possible turn to ecological crops in the future.
- With respect to the crop size area, the most preferred crops for eco exploitation are pastures and meadows, followed by wheat. At the other side, rapeseed the less preferred crop for turning eco.
- 52% of the farmers believe that ecological farming is less profitable than conventional one. The biggest advantage is the subsidy access.
- Farmers that do not operate eco exploitations at the moment are linked mostly to lack of water (irrigations) and the perspective that eco crops are more expensive.
- About half of the farmers are aware of the necessary steps in transforming their farm to a eco one.
- 59% of the total farmers (mainly small ones) think that they could successfully implement the reduction of pesticides and fertilizers in their farm by 2030. Among these 63% will opt for a replacement the conventional PPP with eco PPP. in this case, 57% of the farmers think that the operational costs will increase by 20-50% in order to maintain the same productivity.
- 57% of the total farmers (mainly small ones) think that they could successfully increase the eco cultivated area in their farm by 2030. in this case, 28% of the farmers think that the operational costs will increase by 20-50% in order to maintain the same productivity.
- In case of new CAP subsidy access, farmers prefer most receiving payments for implementing eco agriculture (63% of farmers), establishing forested regions (54% of the farmers) and increasing crop rotation (51% of the farmers)

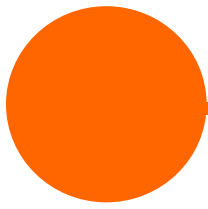


STUDY GOAL

WHAT ARE THE MAIN GOALS AND TARGETS ANALYSED BY THIS STUDY

This study evaluates the general perspectives regarding the **future implementation and impact of New European Common Agricultural Policy on the local Romanian farmers**. The research analyses present and future trends with respect to number of farmers, market coverage, cultivated crop area, cultivated crop type, dependence on integrated producer chain of some of the (without restricting to the) bellow mentioned criteria:

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- General CAP awareness
 - Specific CAP directive awareness
 - The importance of CAP objectives for the local farmers
 - The impact of CAP implementation over farm performance
 - Intention on increasing the ecological cultivated crop area in the near future
 - Intention on reducing pesticide and fertilizer quantity in the near future
 - Ecological crop exploitation status and future perspectives
 - Perception on reducing the level/quantity of pesticides and fertilizer in the farms by 2030, completed by the economical impact on farm and the cost and benefits for the farmers.
 - Perception on increasing the level of ecological agriculture with 25% by 2030, completed by the economical impact on farm and the cost and benefits for the farmers.
 - Farmers' option for ag subsidies.

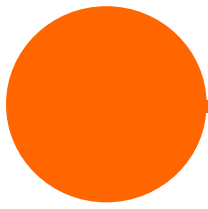


HOW WE DID IT

HOW WE COLLECTED THE DATA

METHODOLOGY	TARGET	TIMING	ERROR RATE
We used a CATI (Computer Assisted Telephone Interviewing) methodology.	We targeted a number of 605 respondent farmers nation-wide displaced. We focused on farms bigger than 30 hectares*	We collected and analysed the data throughout OCT-NOV 2020. The length of one interview: 8-10 mins	The estimated error rate is lower than 4%.

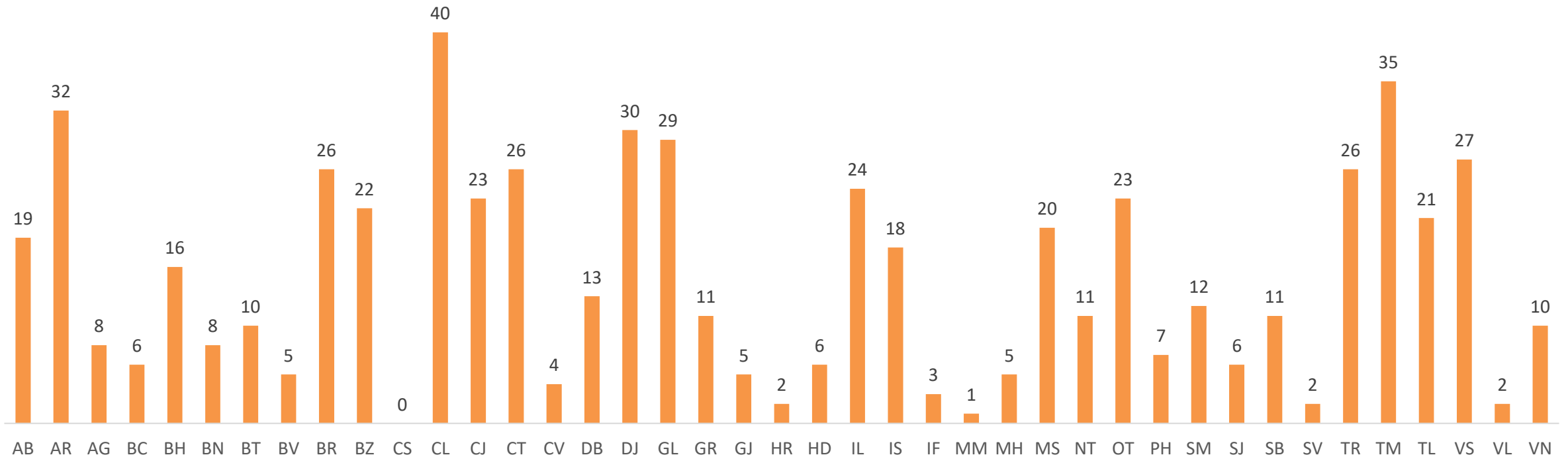
* We chose this threshold to avoid analysing subsistence agriculture exploitation (that usually refers to household agriculture exploitation or to agriculture that does not return products into local economy).



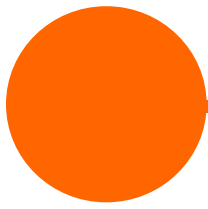
DEMOGRAPHICS

COUNTY COVERAGE, RELATED TO TOTAL NO OF FARMERS

The county where the farm is located:
(N=605)

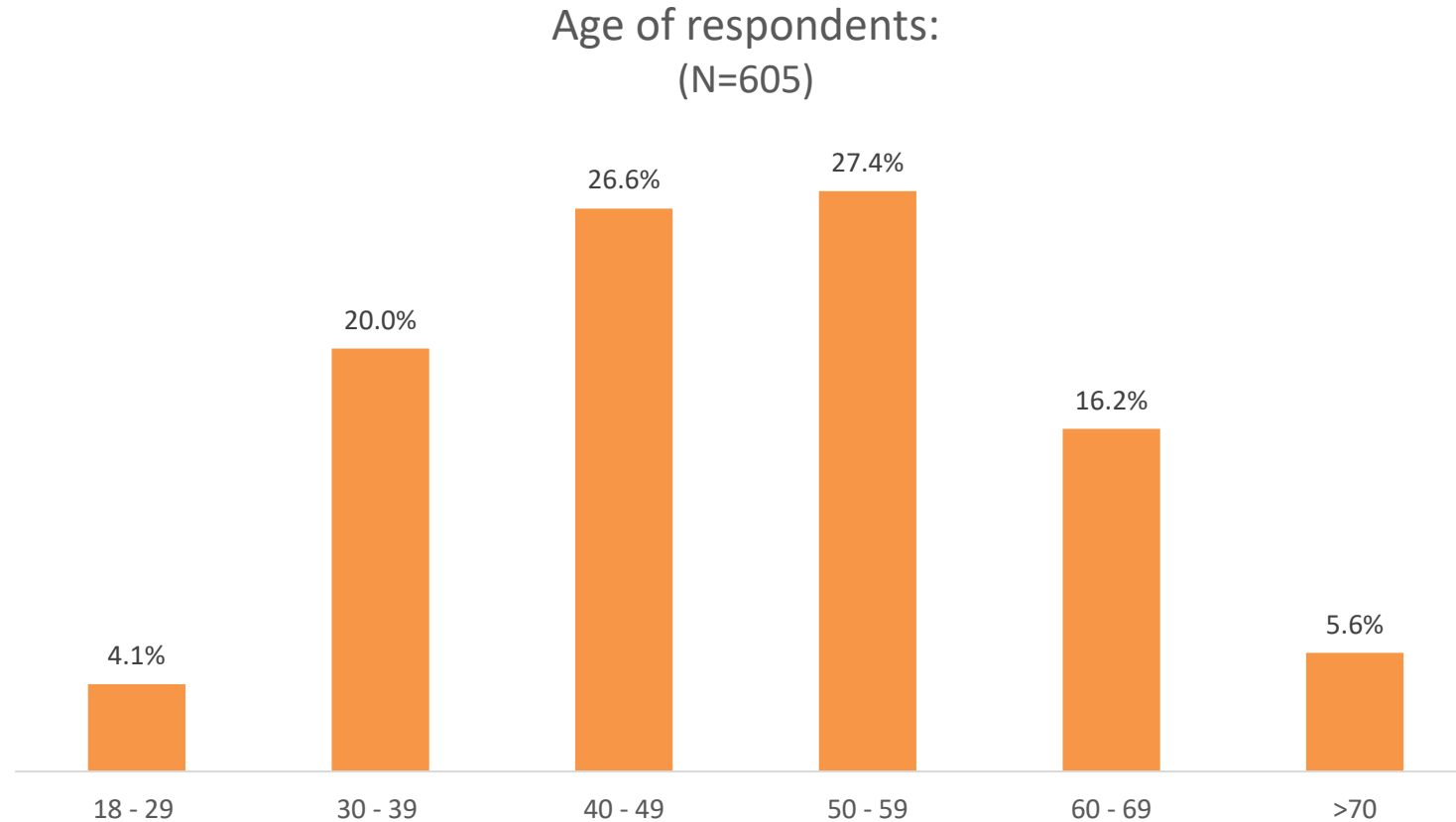


- Most farmer respondents were from counties that are agriculture industry performers, such as IL, CT, BR, CL, TM, AR, DJ, GL.



DEMOGRAPHICS

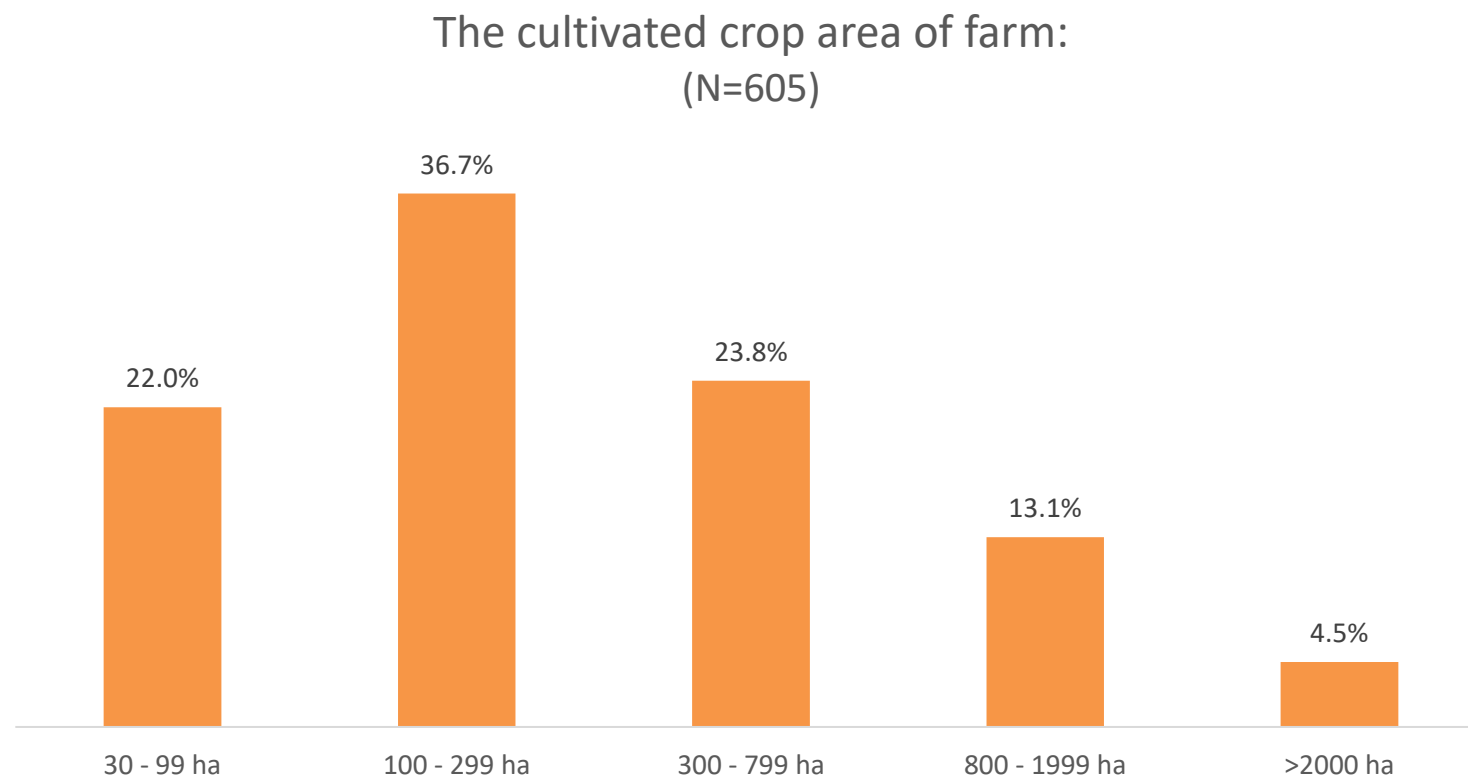
AGE OF THE RESPONDENTS, RELATED TO TOTAL NO OF FARMERS



- Normal distribution corresponding to age distribution.

DEMOGRAPHICS

FARM SIZE, RELATED TO TOTAL NO OF FARMERS

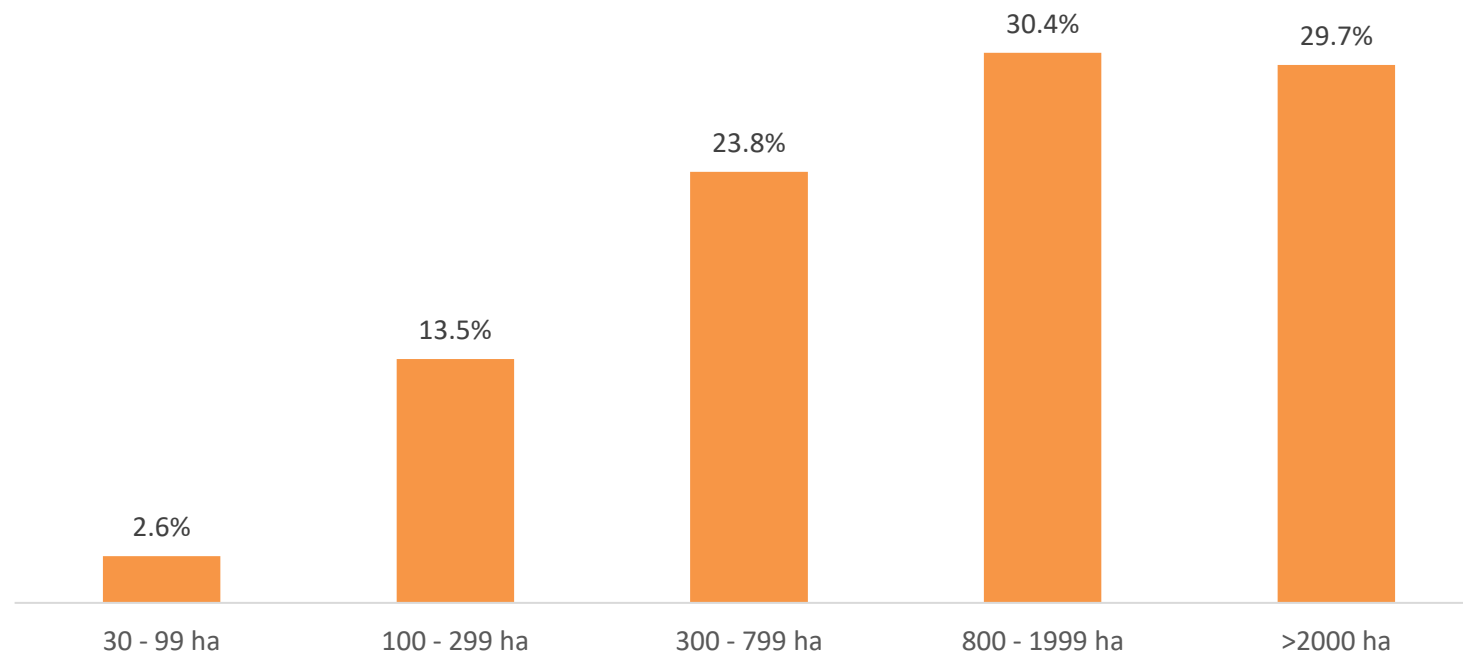


- The study targeted farmers with a total cultivated farm area larger than 30 hectares.
- All farm size segments were covered with respect to general distribution of farm size at country nation wide level (Romania).

DEMOGRAPHICS

FARM SIZE, RELATED TO TOTAL ANALYSED CULTIVATED AREA

The cultivated crop area of farm: area related to total area
(Total area = 287.325 ha)

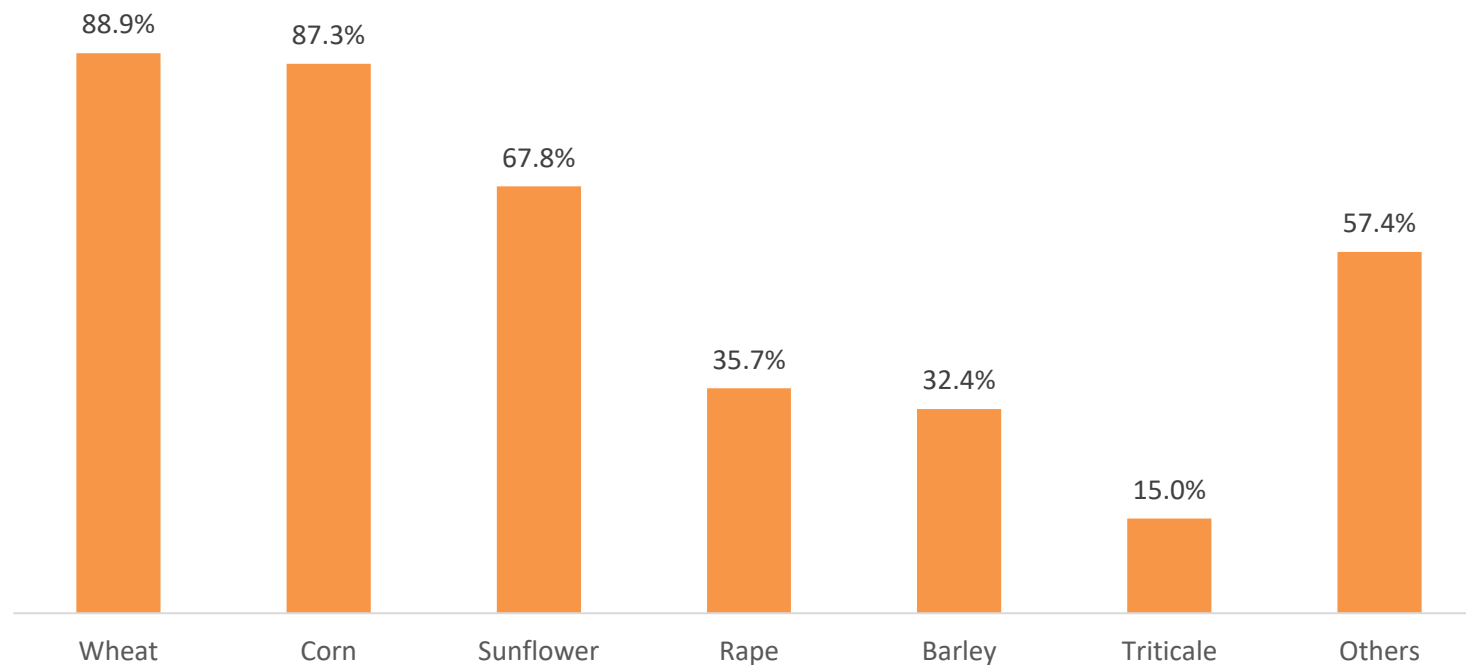


- The total crop size of all the farms interviewed in this study is approx 387 kha.

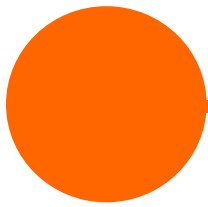
DEMOGRAPHICS

TYPE OF CROPS, RELATED TO NO OF FARMS

Type of crops that are cultivated in analyzed farms:
(N=605)



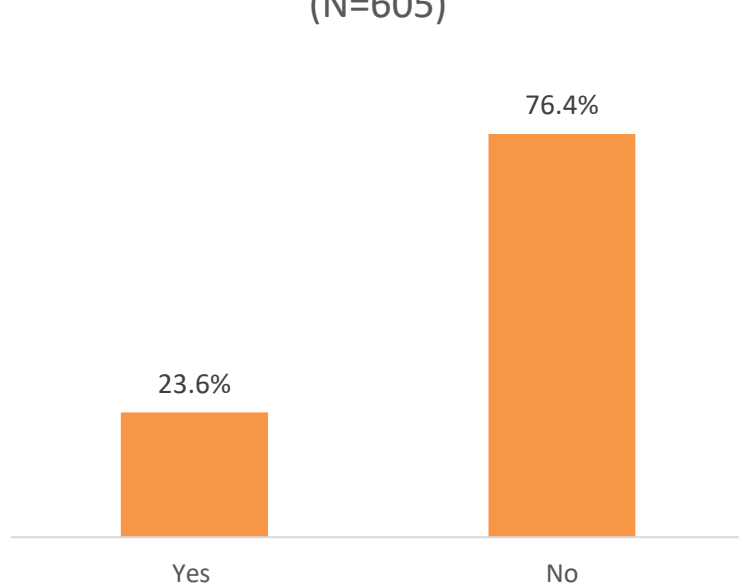
- The main cultivated crops by farm are wheat, corn and sunflower.



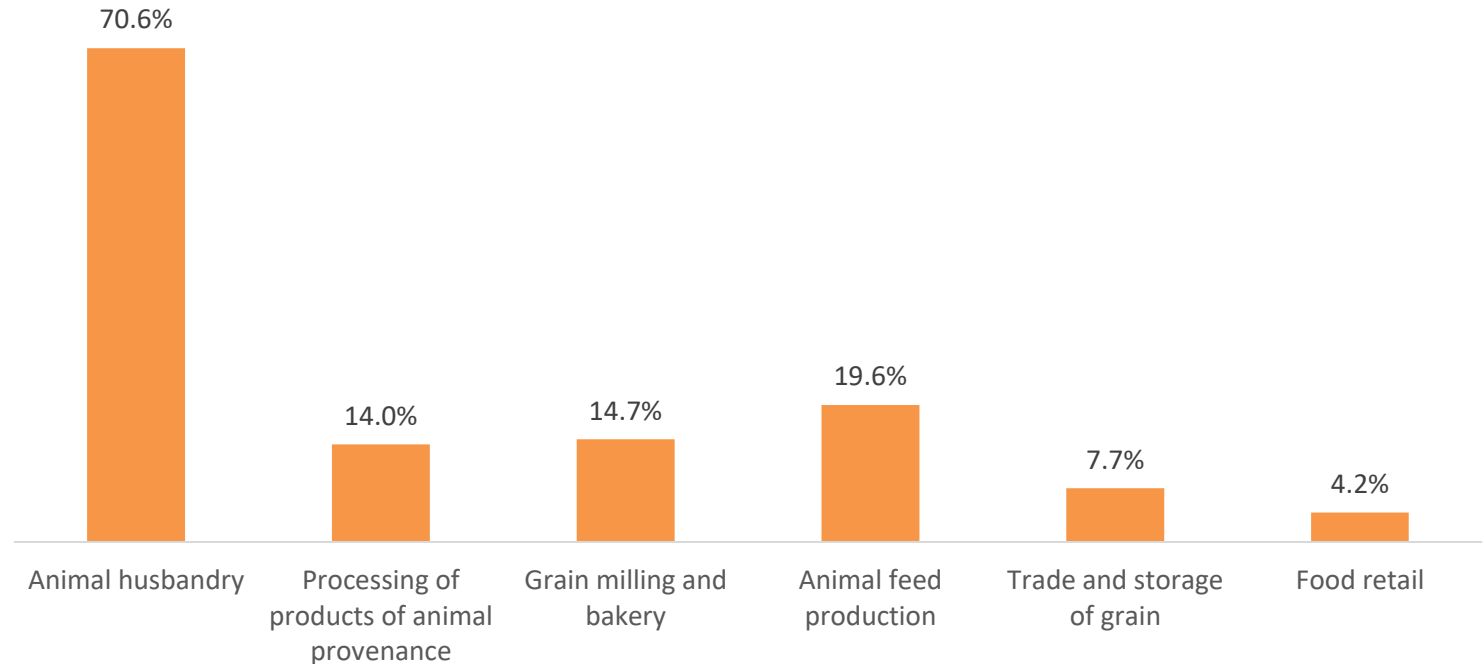
DEMOGRAPHICS

PRODUCTION CHAIN MEMBERSHIP, RELATED TO NO OF FARMS

Are you a member of any integrated production chain?
(N=605)



Tell me the integrated chain of production you belong to:
(N=143)

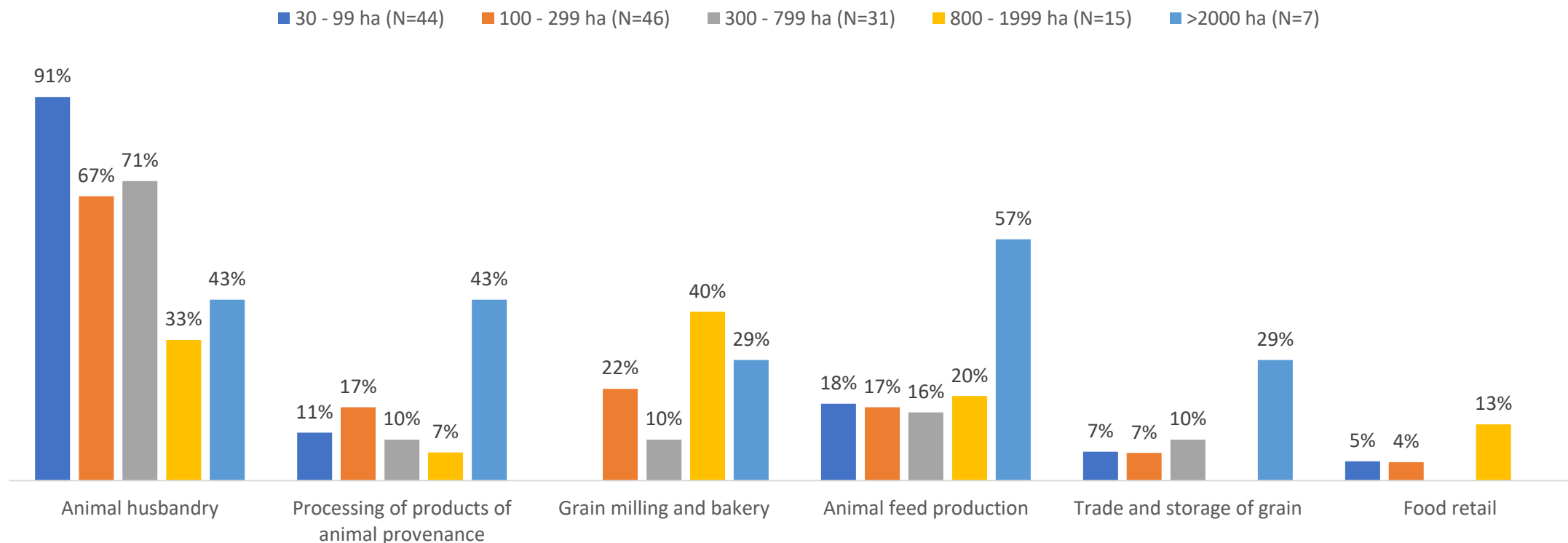


- Almost a quarter of the respondents are a member of a integrated production chain.
- The commonly met production chain is the animal husbandry.

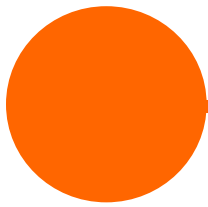
DEMOGRAPHICS

PRODUCTION CHAIN MEMBERSHIP, RELATED TO NO OF FARMS

Tell me the integrated chain of production you belong to:



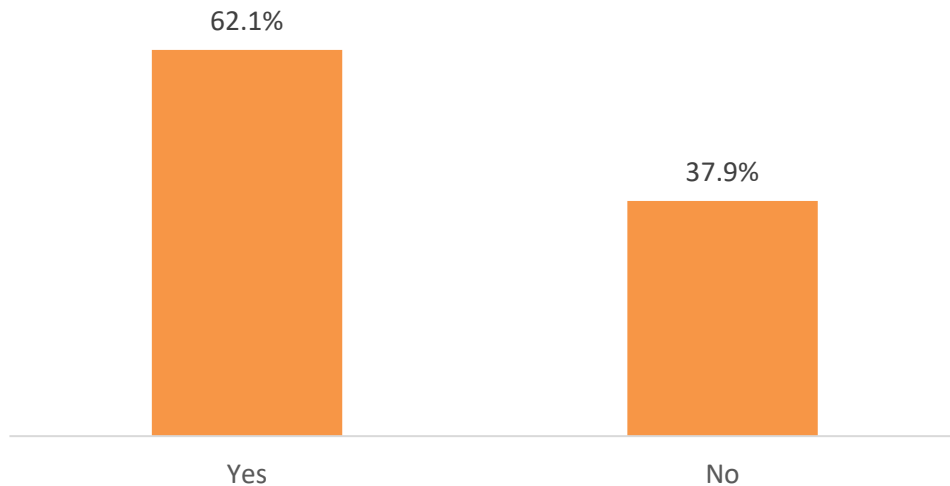
- Smaller farms are more involved in animal husbandry



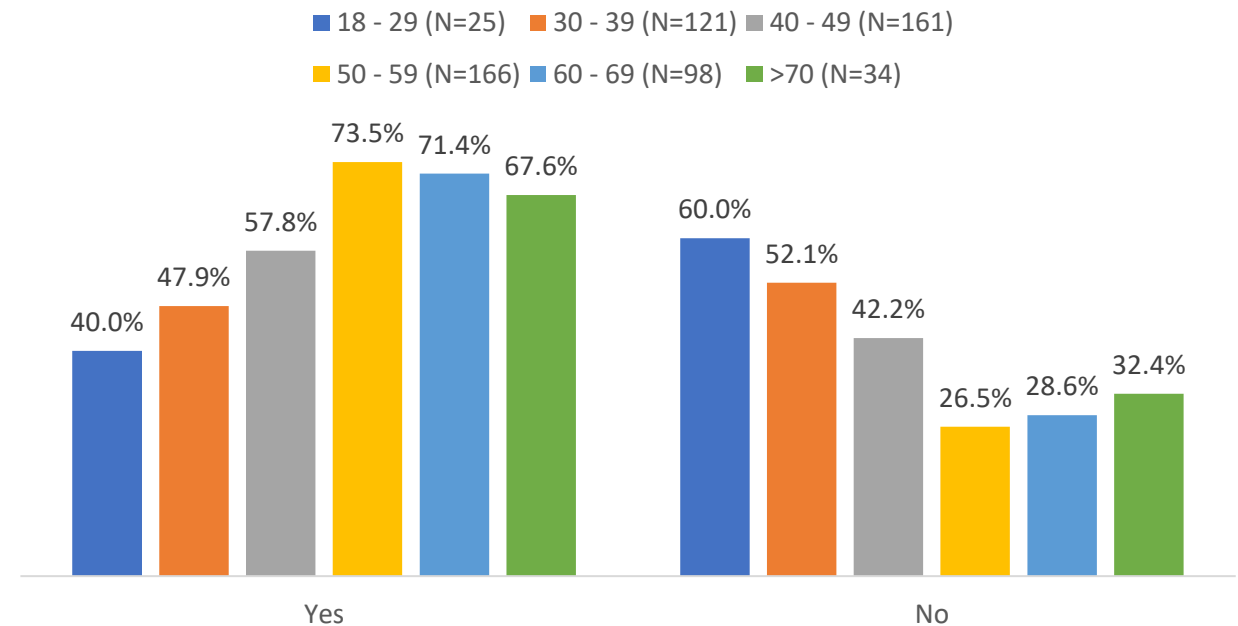
DEMOGRAPHICS

FAMILY MEMBERS TO CONTINUE THE BUSINESS, RELATED TO NO OF FARMS AND FAMER AGE

Are there younger members of your family who would like to build a career in agriculture or, eventually, take the business?
(N=605)



Are there younger members of your family who would like to build a career in agriculture or, eventually, take the business?



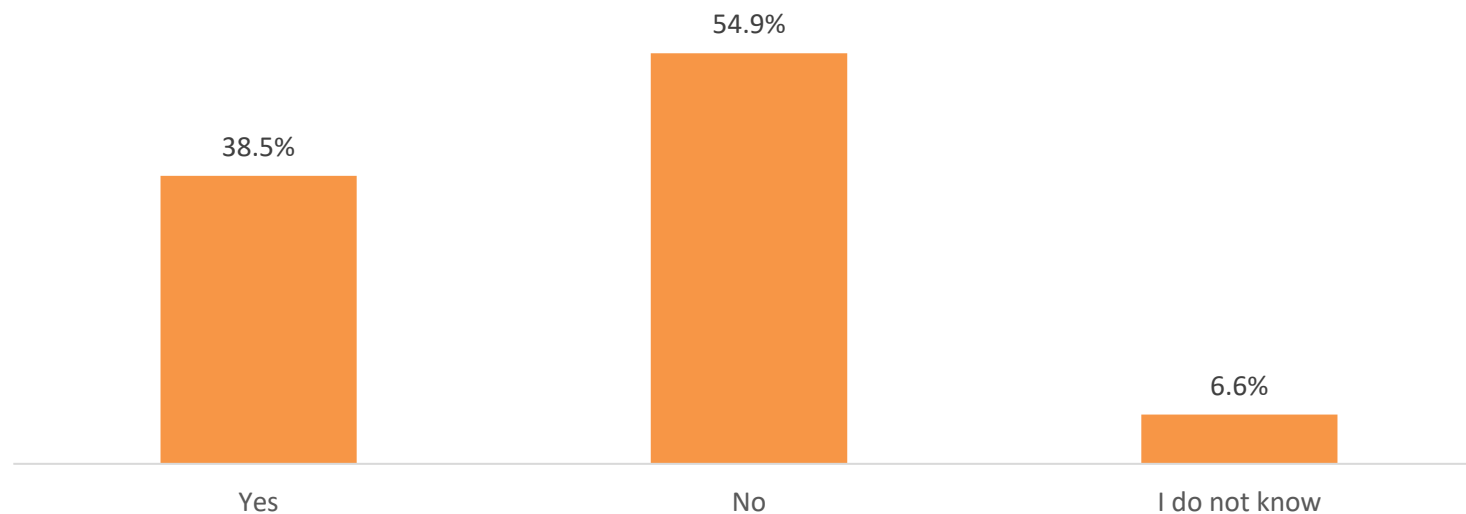
- Farms that are run by older farmers have more opportunities for succession regarding agribusiness investment and opportunities.

CAP, GENERAL AWARENESS

CAP AWARENESS, DEPENDING ON TOTAL NO OF FARMERS

Are you aware about the new Common Agricultural Policy (CAP) that will be enforced on the European Union Level?

(N=605)

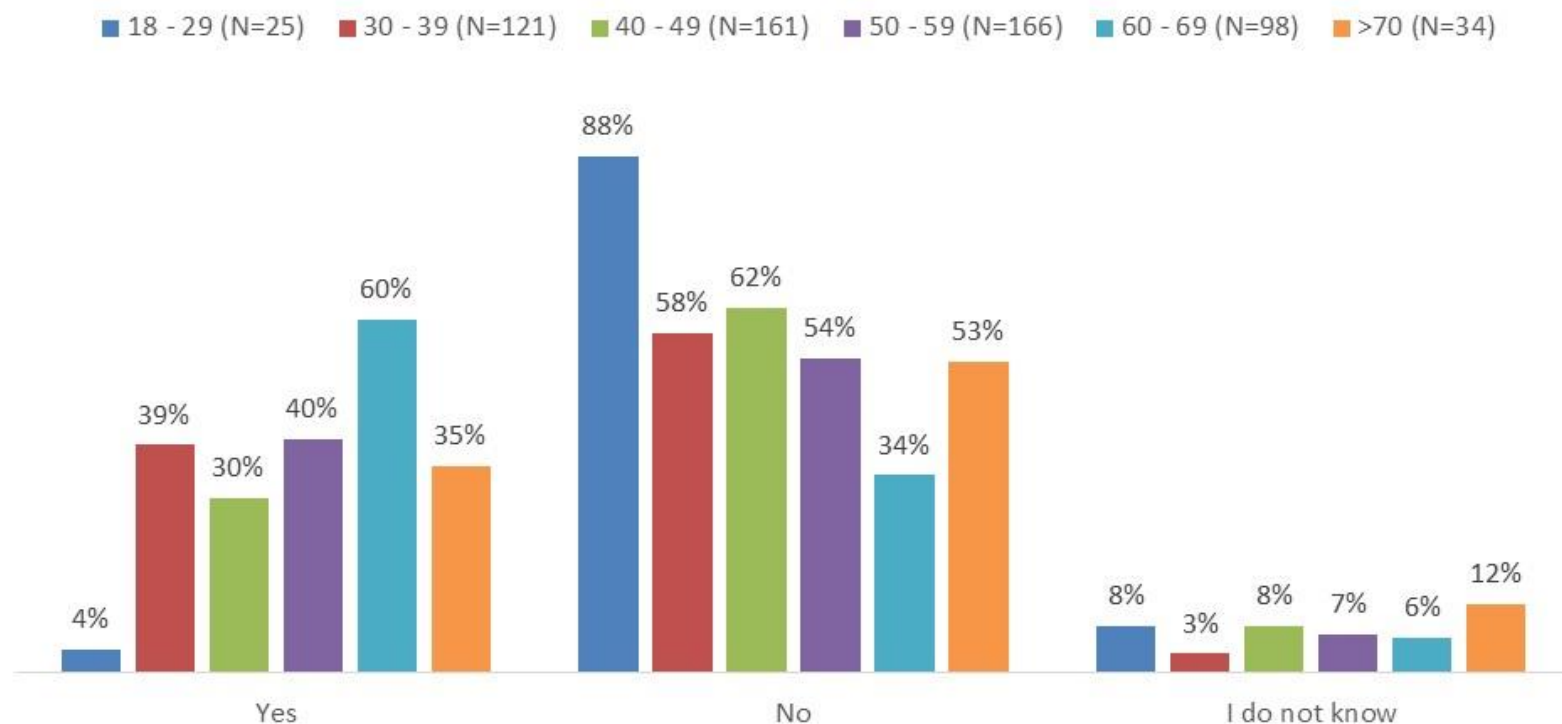


- More than half of the respondents are not aware of the New Common Agricultural Policy.

CAP, GENERAL AWARENESS

CAP AWARENESS, DEPENDING ON TOTAL FARMERS AGE

Are you aware about the new Common Agricultural Policy (CAP) that will be enforced on the European Union Level?



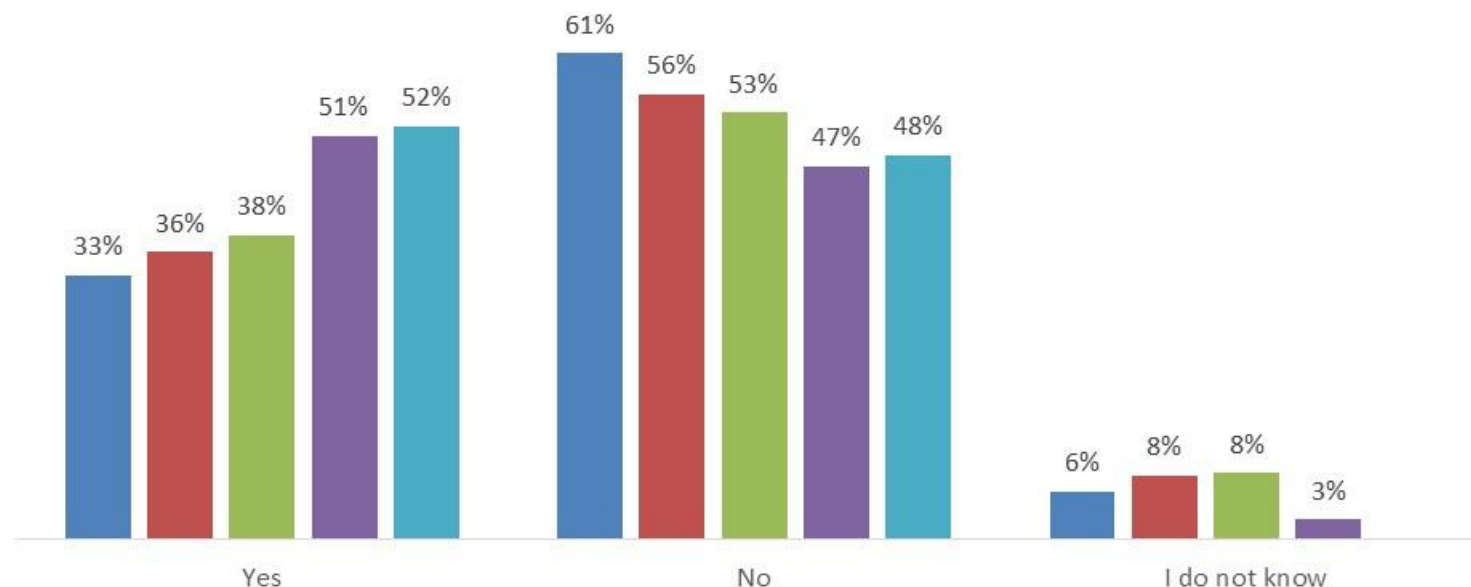
- The less aware farmers are the young ones (<30 yrs)
- There is a noticeable tendency of increasing awareness by increasing the age of the respondents, meaning that the elder the farmer is, the more he/she is interested in the new CAP.

CAP, GENERAL AWARENESS

CAP AWARENESS, DEPENDING ON TOTAL CULTIVATED AREA SIZE

Are you aware about the new Common Agricultural Policy (CAP) that will be enforced on the European Union Level?

■ 30 - 99 ha (N=133) ■ 100 - 299 ha (N=222) ■ 300 - 799 ha (N=144) ■ 800 - 1999 ha (N=79) ■ >2000 ha (N=27)



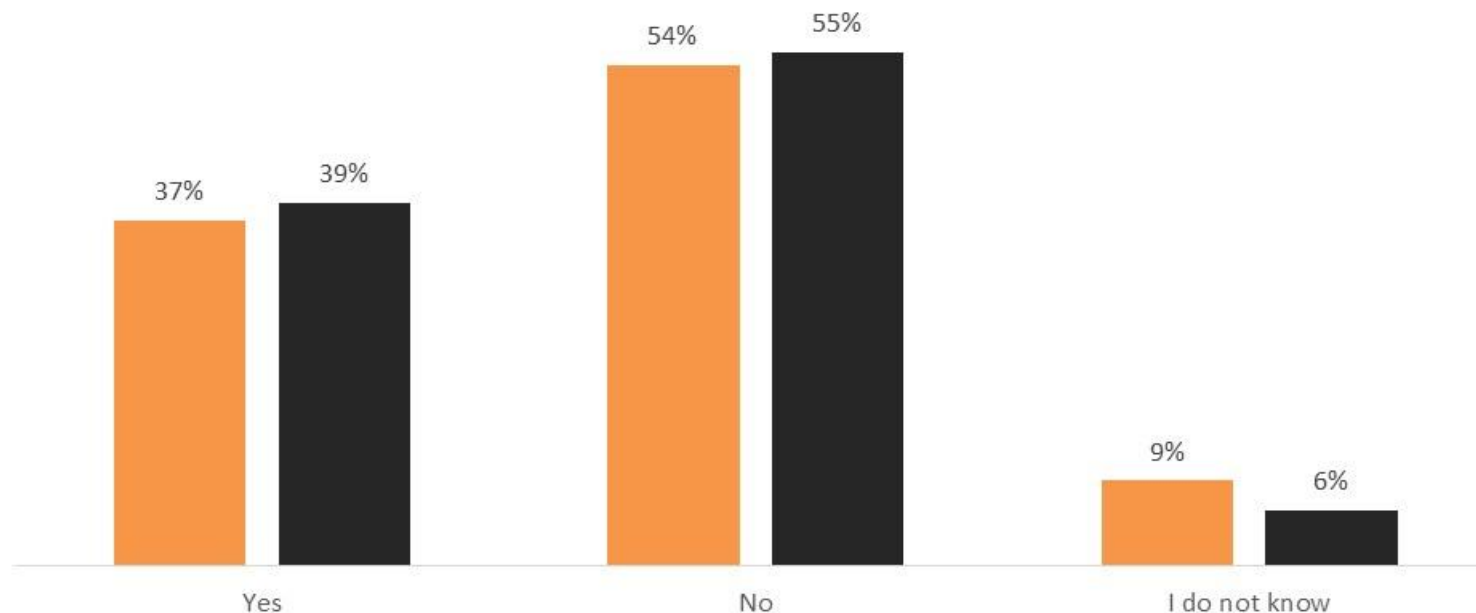
- The less aware farmers are the ones that operate small farms (<100 hectares)
- There is a noticeable tendency of increasing awareness by increasing the total cultivated area of the farms, meaning that the bigger the farmer is, the more the farmer is interested in the new CAP.

CAP, GENERAL AWARENESS

CAP AWARENESS, DEPENDING ON INTEGRATED PRODUCTION CHAIN MEMBERSHIP

Are you aware about the new Common Agricultural Policy (CAP) that will be enforced on the European Union Level?

■ Part of an integrated production chain - Yes (N=143) ■ Part of an integrated production chain - No (N=462)

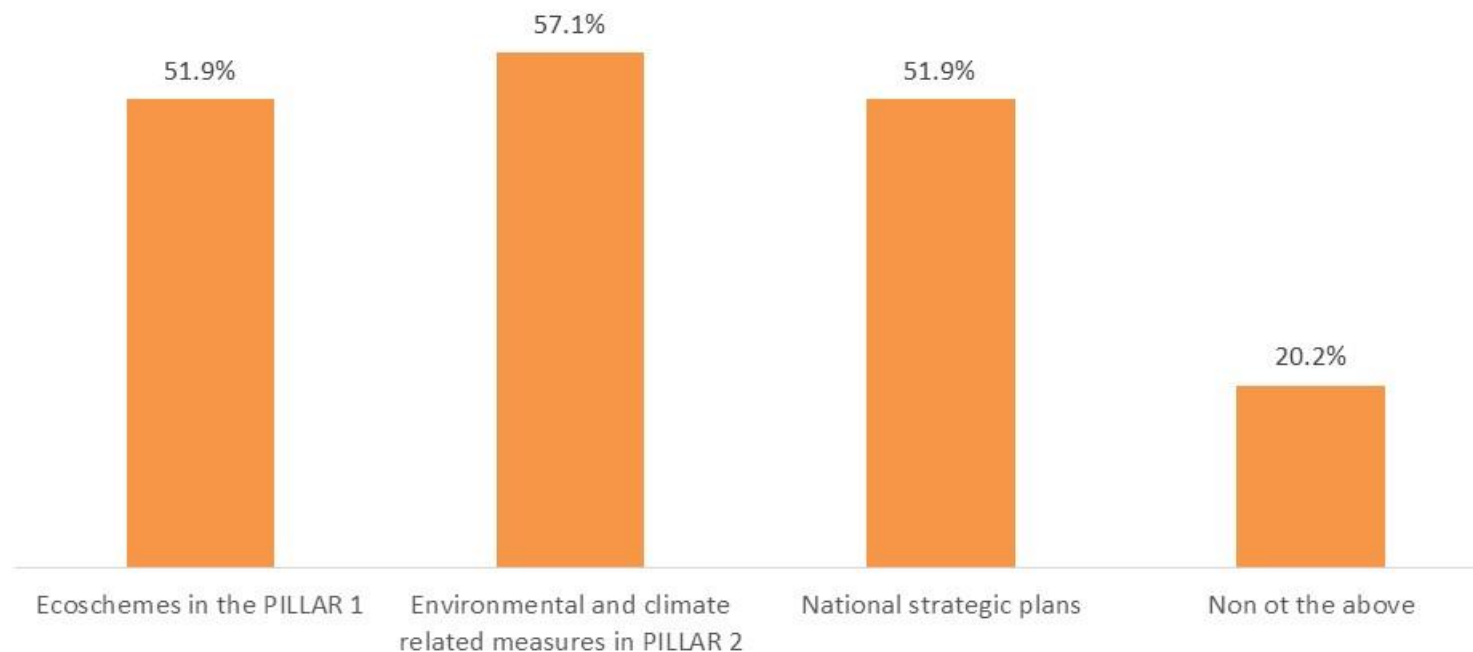


CAP, POLICY DIRECTIVE AWARENESS

CAP POLICY DIRECTIVES, DEPENDING ON TOTAL NO OF FARMERS (CAP AWARE FARMS)

Mention which of the following policy directives of the new CAP you are informed about:

(N=233)

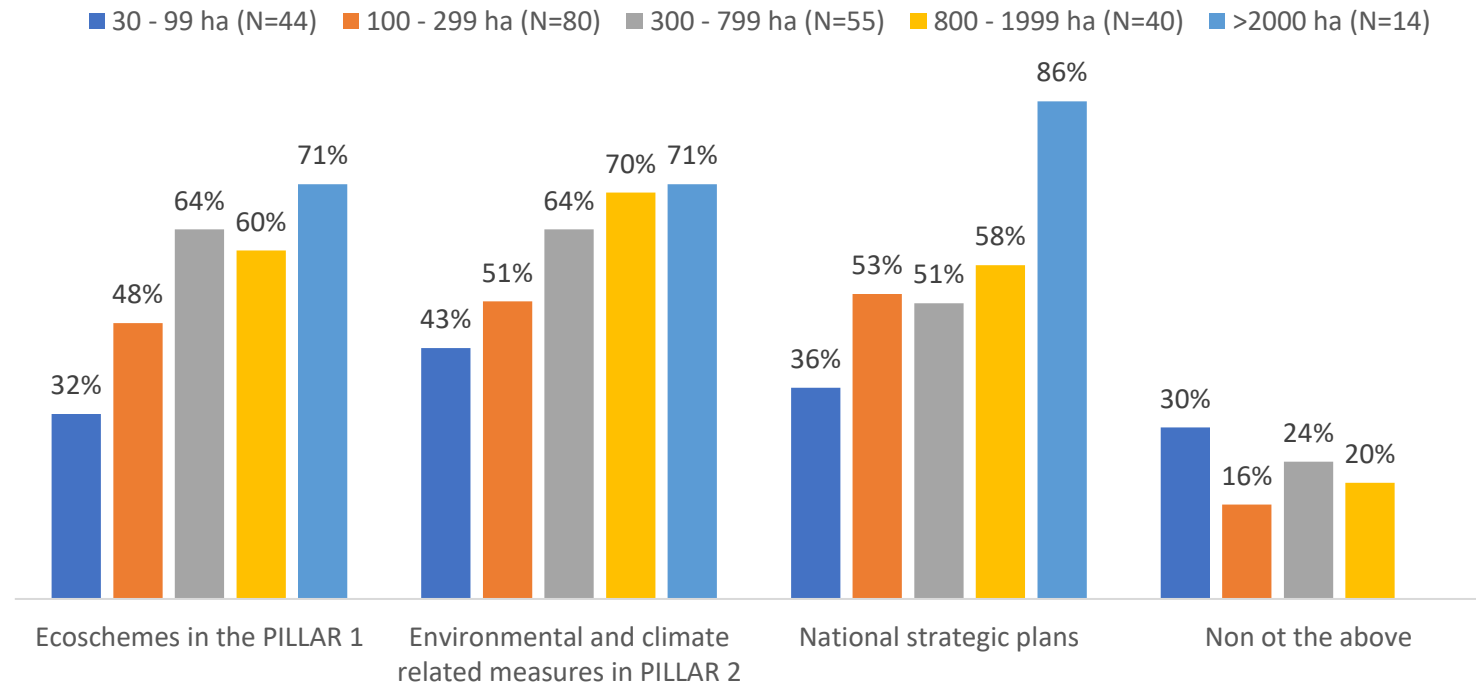


- 20% of the aware farmers declare that, actually, are not informed.
- About half of the total farmers that are aware of the new CAP are informed either about PILLAR 1, PILLAR2 or the National Strategic Plans.
- The CAP policy directive that **farmers are most informed about is the PILLAR 2.**

CAP, POLICY DIRECTIVE AWARENESS

CAP POLICY DIRECTIVES, DEPENDING ON FARM SIZE (CAP AWARE FARMS)

Mention which of the following policy directives of the new CAP you are informed about:



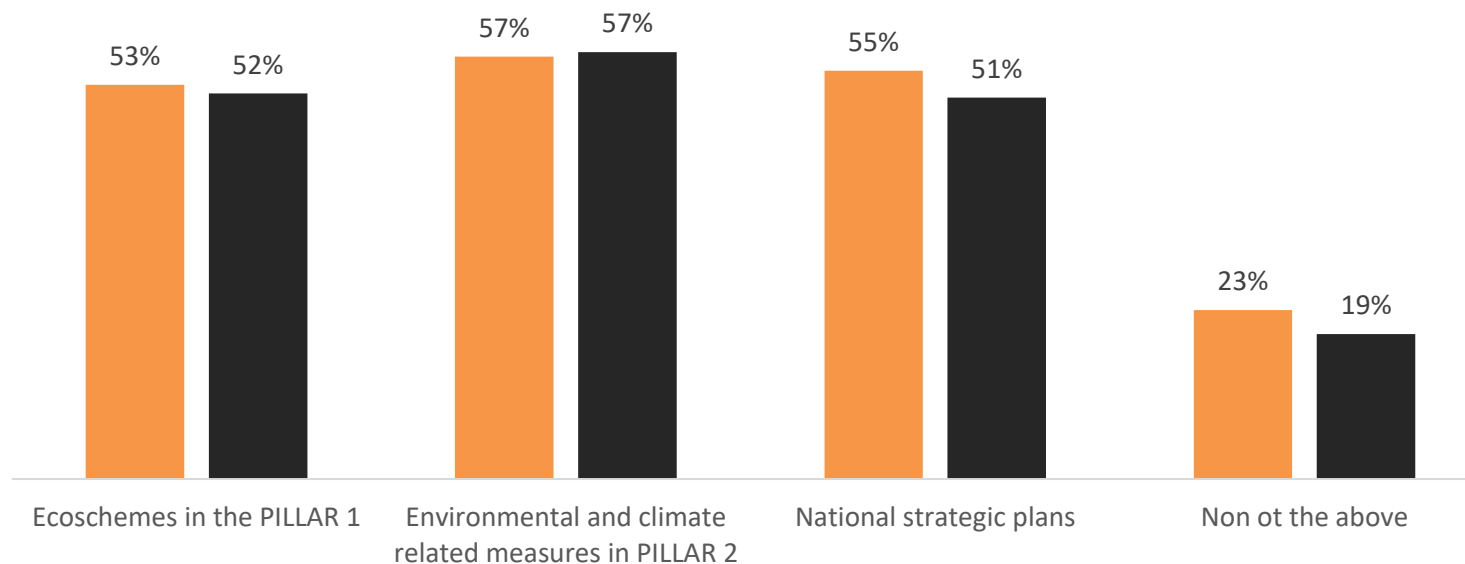
- The awareness on policy directives increases, in general, by farm size, no matter the policy.
- There is a higher, noticeable increase of interest on national strategic plans for bigger farms (>2000 hectares), while farmers between 300-2000 hectares show an inverted tendency.
- A general conclusion is that, **while the farm size increases, the farmers' policy directive awareness moves from eco-schemes and environmental and climate policies towards national strategic plans.**

CAP, POLICY DIRECTIVE AWARENESS

CAP POLICY DIRECTIVES, DEPENDING ON INTEGRATED PRODUCTION CHAIN MEMBERSHIP

Mention which of the following policy directives of the new CAP you are informed about:

■ Part of an integrated production chain - Yes (N=53) ■ Part of an integrated production chain - No (N=180)

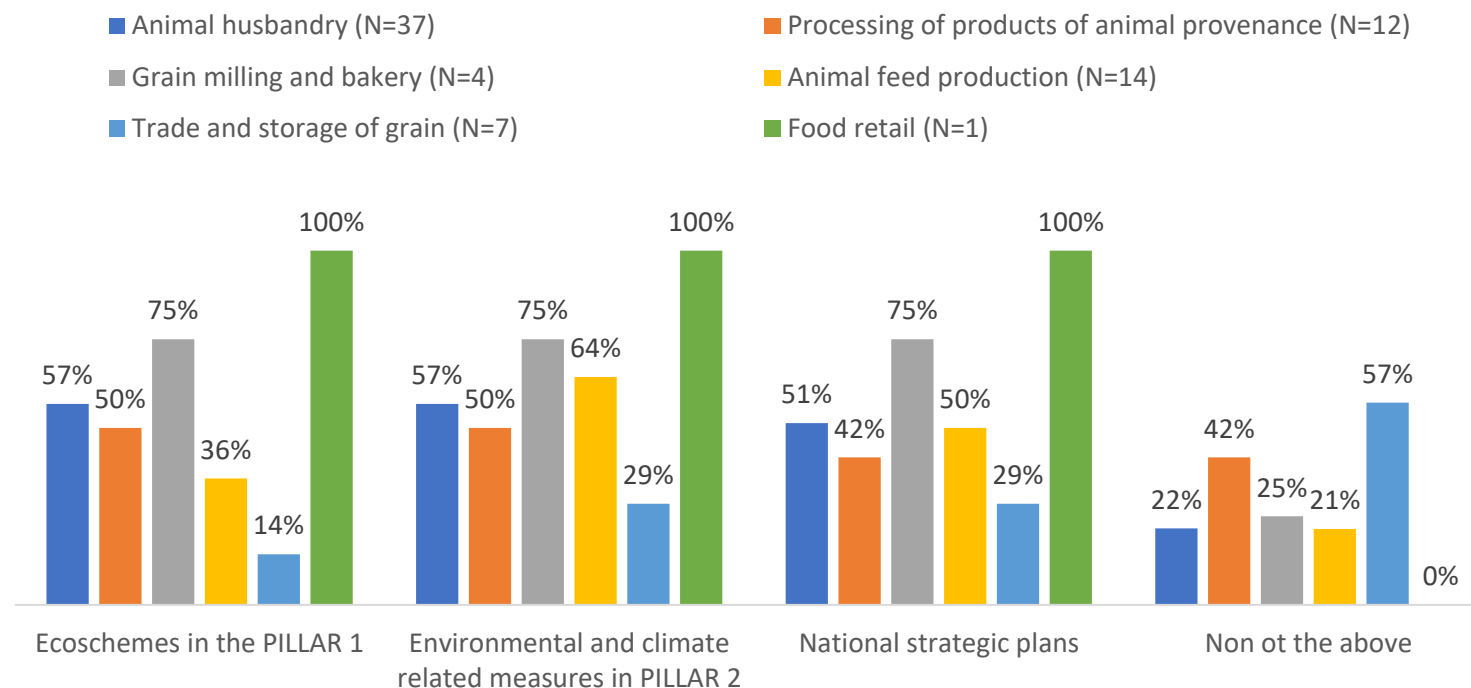


- There is no noticeable difference between the farmers that do and the ones that do not belong to a integrated production chain, no matter the policy directive.

CAP, POLICY DIRECTIVE AWARENESS

CAP POLICY DIRECTIVES, DEPENDING ON TYPE OF INTEGRATED PRODUCTION CHAIN

Mention which of the following policy directives of the new CAP you are informed about:

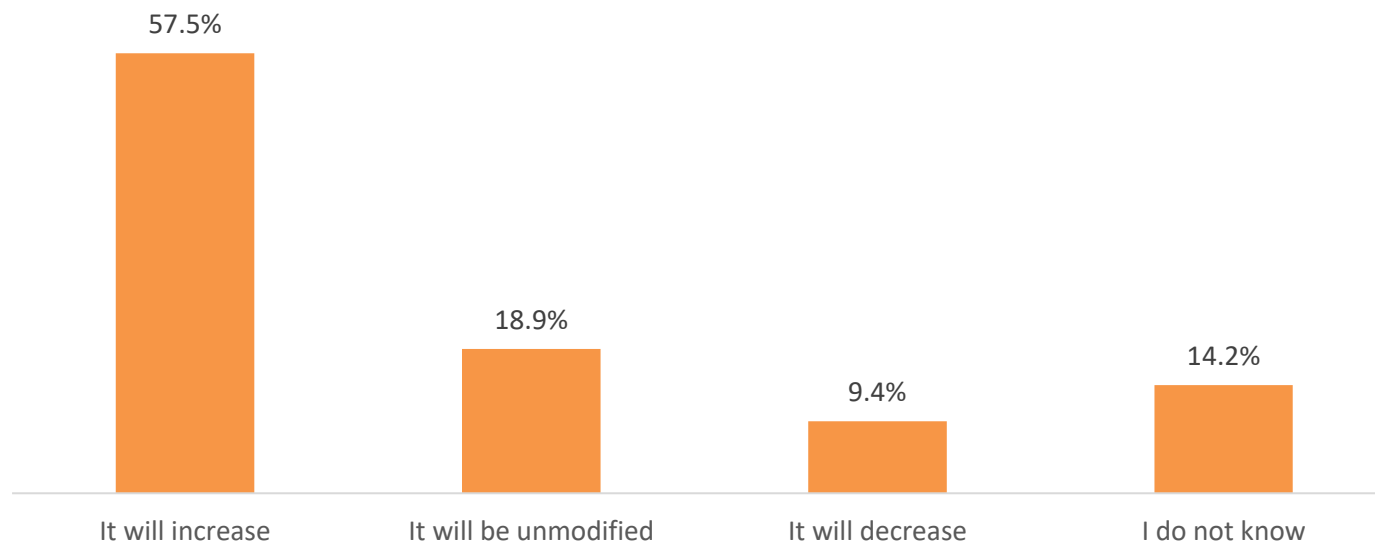


- There is a higher interest towards the CAP policy directives among food retail, grain milling and bakery and animal husbandry farmers. These might be the **farmers that are directly linked to the end consumer.**

CAP IMPLEMENTATION EFFECT ON FARM PERFORMANCE

CAP IMPLEMENTATION EFFECT ON FARMS, DEPENDING ON NO OF FARMERS

In what sense do you believe your farm performance will be affected by the new CAPs implementation?
(N=233)

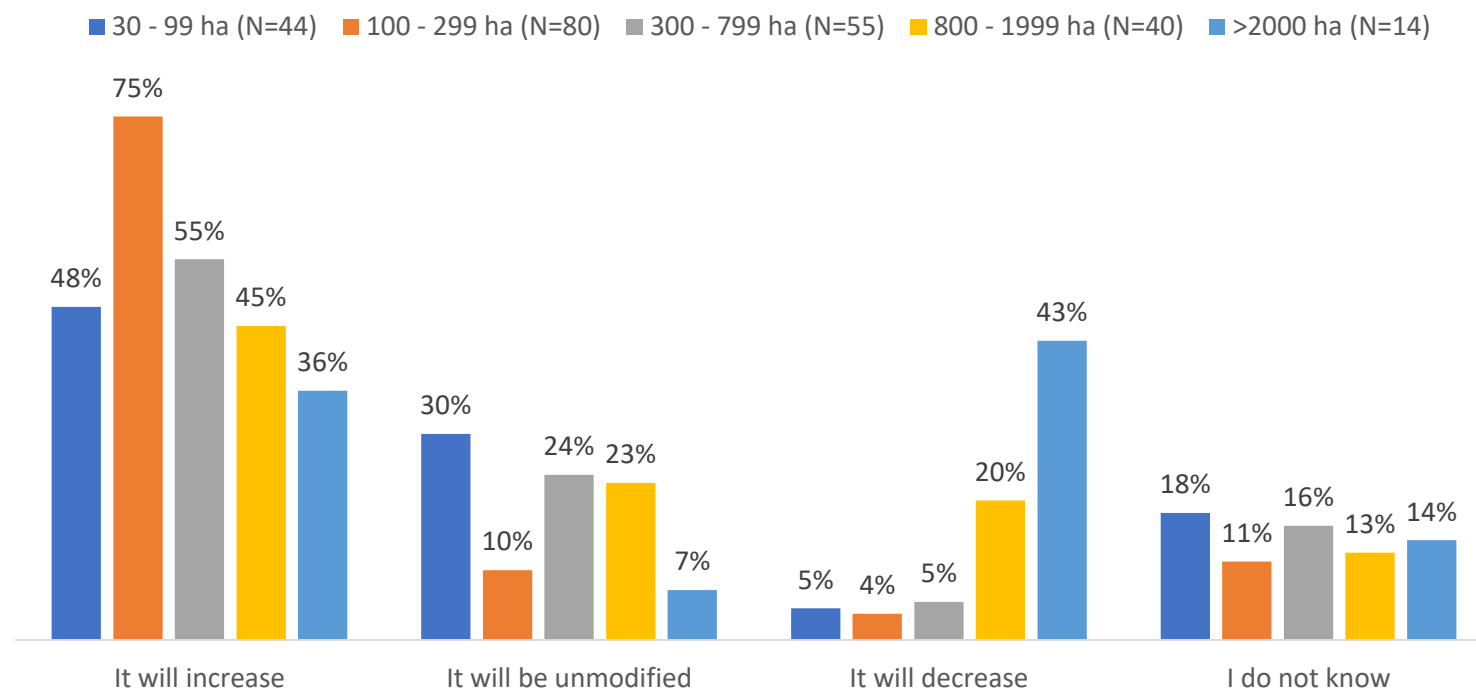


- **More than half of the total respondents are optimistic about the new CAP**, thinking that their farm performance will increase alongside the implementation of the new CAP.

CAP IMPLEMENTATION EFFECT ON FARM PERFORMANCE

CAP IMPLEMENTATION EFFECT ON FARMS, DEPENDING ON FARM SIZE

In what sense do you believe your farm performance will be affected by the new CAPs implementation?



- **The optimism regarding the positive effects of CAP implementation on farms decreases by the increase of the farm size.** Bigger farms (>2000 hectares) think that the implementation of the new CAP will lead to a decrease in their own farm performance.

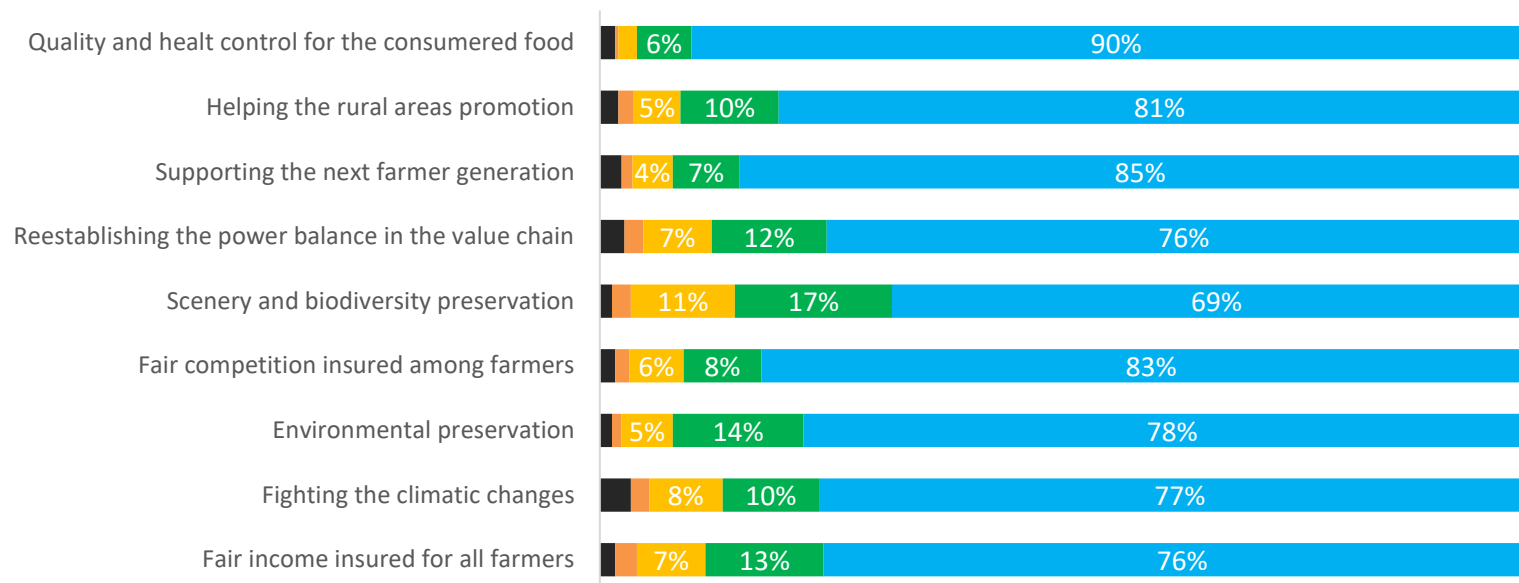
THE IMPORTANCE OF CAP OBJECTIVES

CAP GENERAL OBJECTIVES, DEPENDING ON NO OF FARMERS

On a 1-5 scale, please state how important the following CAP objectives are for you at the moment:

(N=605)

■ 1 = the lowest importance ■ 2 ■ 3 ■ 4 ■ 5 = the highest importance



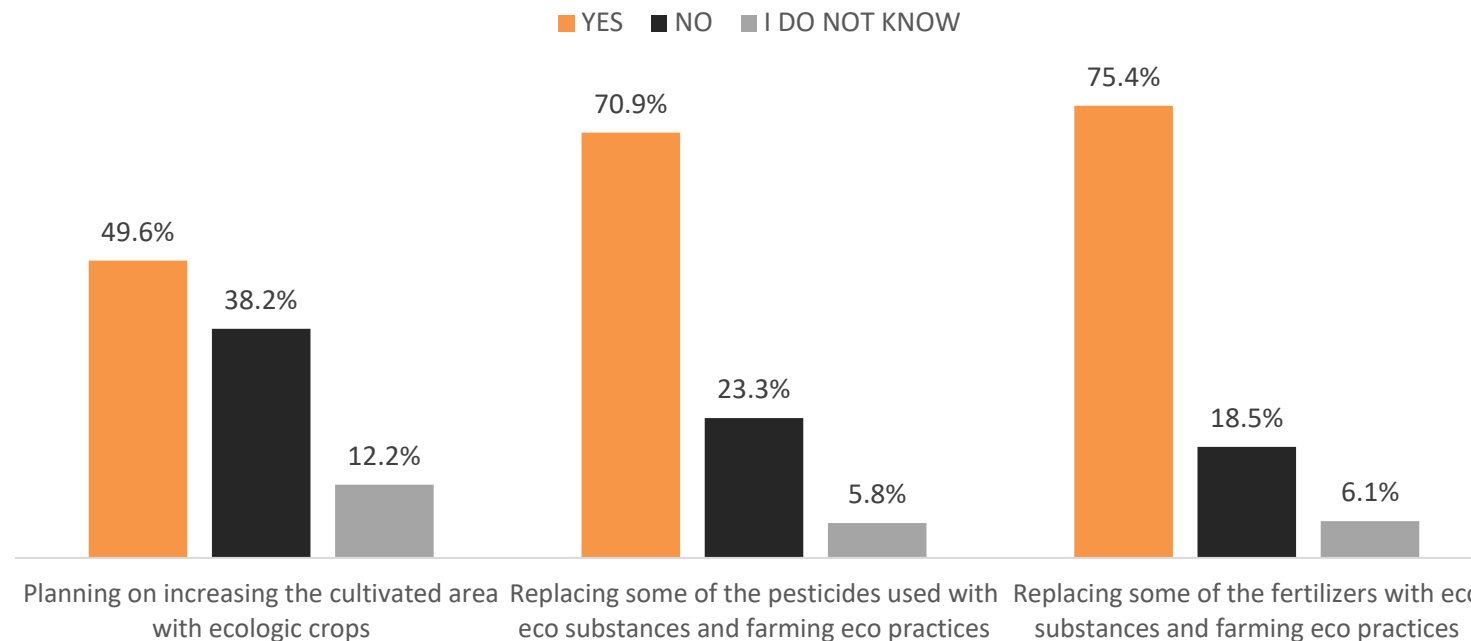
- Mostly, all farmers state all the CAP objectives as being of a high importance for themselves.
- The most important CAP goal is the quality and health control for the consumed food, **a surprise**.
- The less important CAP goal is the scenery and biodiversity preservation.

FARMERS INTENTION ON ECO IMPLEMENTATION

ECO MEASURES IMPLEMENTATION IN NEXT 3-5 YRS, DEPENDING ON NO OF FARMS

Please specify if you have the following intentions throughout next 3-5 years for your own farm:

(N=605)

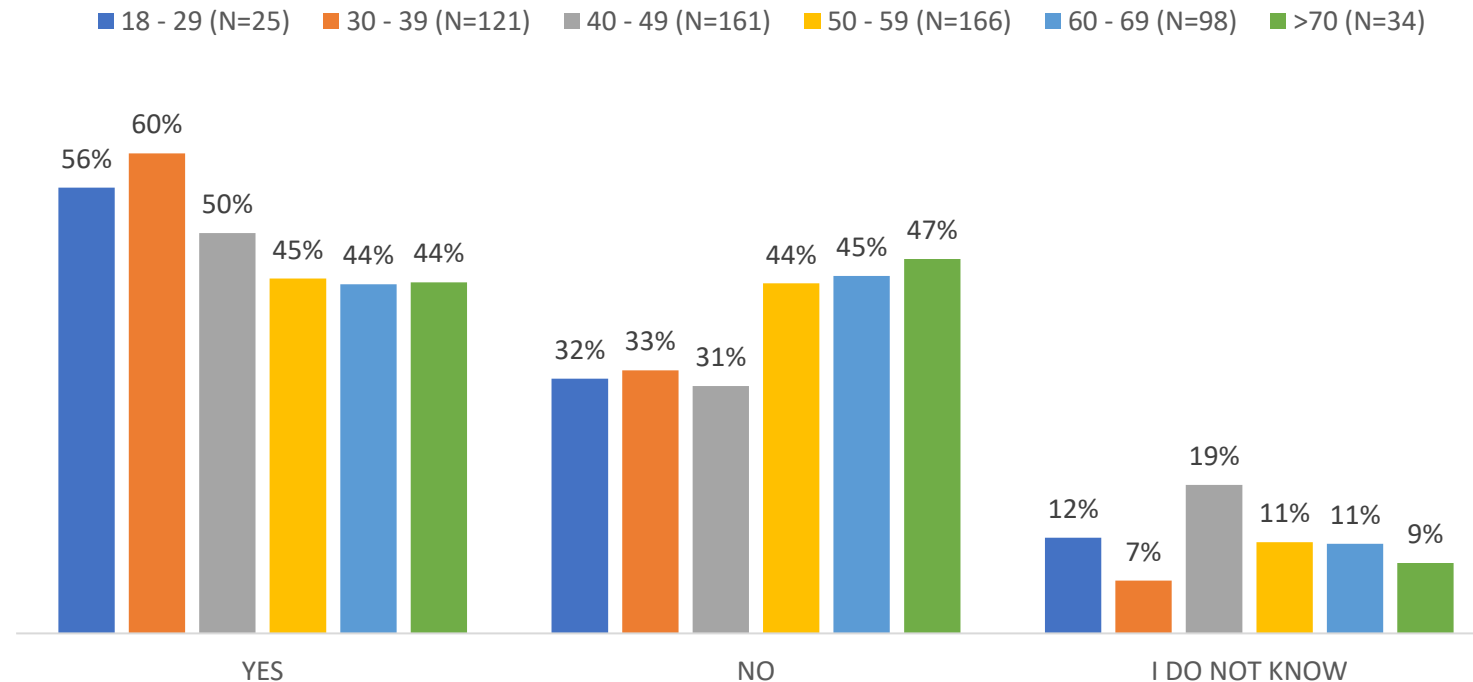


- The majority of farmers want to **invest in developing eco-driven measures in the next 3-5 years.**
- The most preferred option is replacing some of the fertilizers with eco-substances and farming eco-practices.

INTENTION ON INCREASING ECO CROP AREA

ECO CROP AREA INCREASE IN NEXT 3-5 YRS, DEPENDING ON FARMER AGE

Planning on increasing the cultivated area with ecological crops:

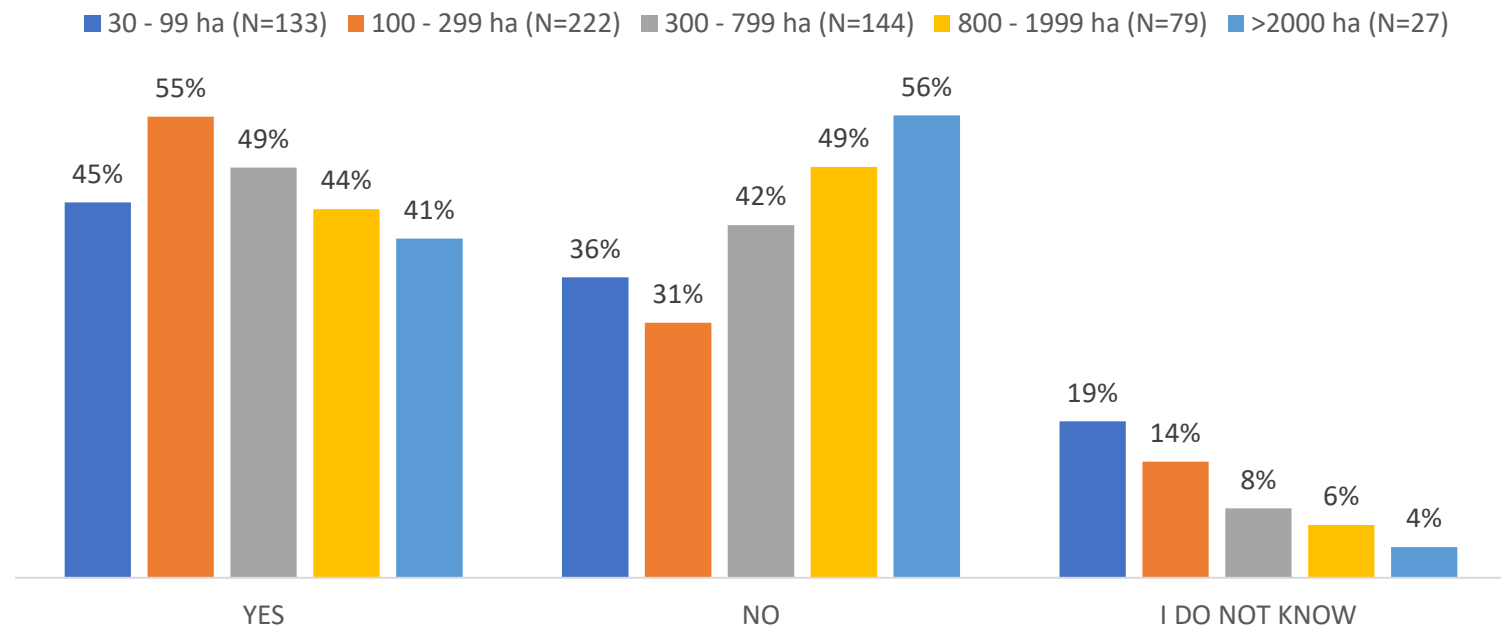


- A normal behaviour, the availability for change decreases while the farmer age increases.
- The farmers that are most available for turning into eco farming implementation are the ones between 30-40 yrs. **The youngsters see a future in this.**

INTENTION ON INCREASING ECO CROP AREA

ECO CROP AREA INCREASE IN NEXT 3-5 YRS, DEPENDING ON FARM SIZE

Planning on increasing the cultivated area with ecological crops:

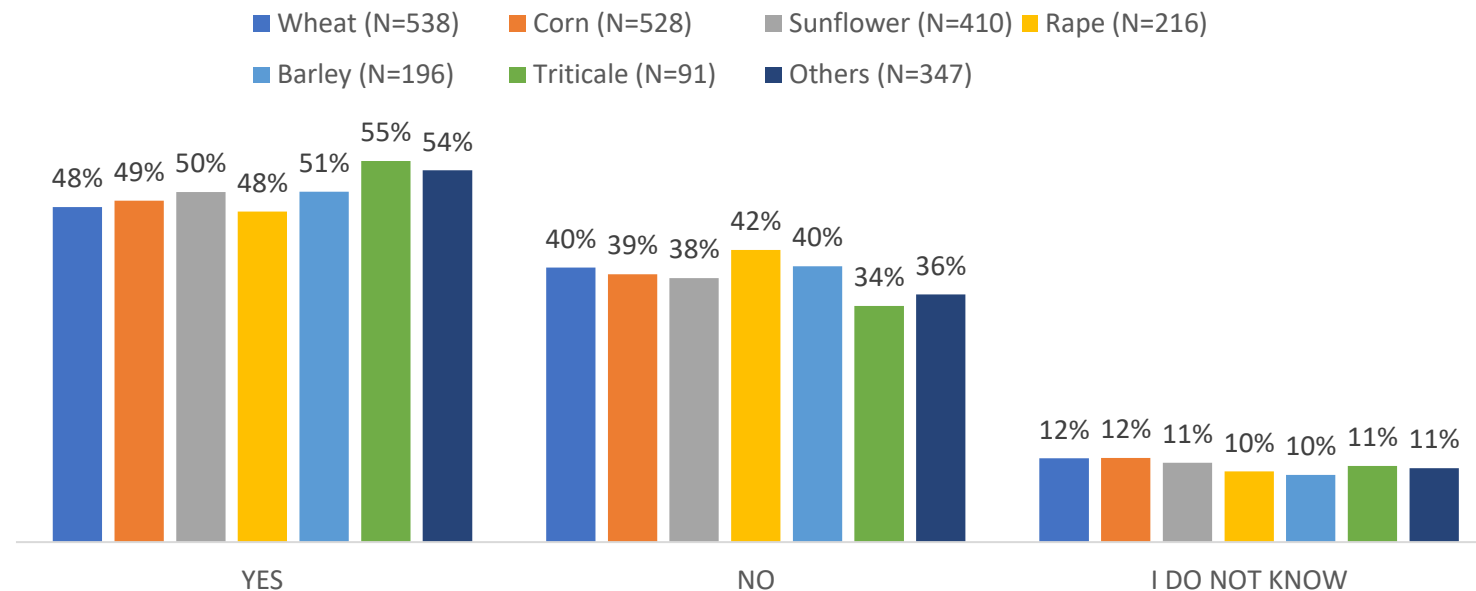


- The option towards increasing the eco cultivated area decreases by farm size increase, meaning that **bigger farms don't have a noticeable determination in turning eco in the next 3-5 years.**

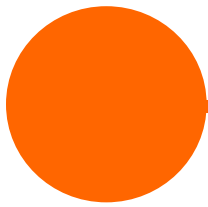
INTENTION ON INCREASING ECO CROP AREA

ECO CROP AREA INCREASE IN NEXT 3-5 YRS, DEPENDING ON CROP TYPE

Planning on increasing the cultivated area with ecological crops:



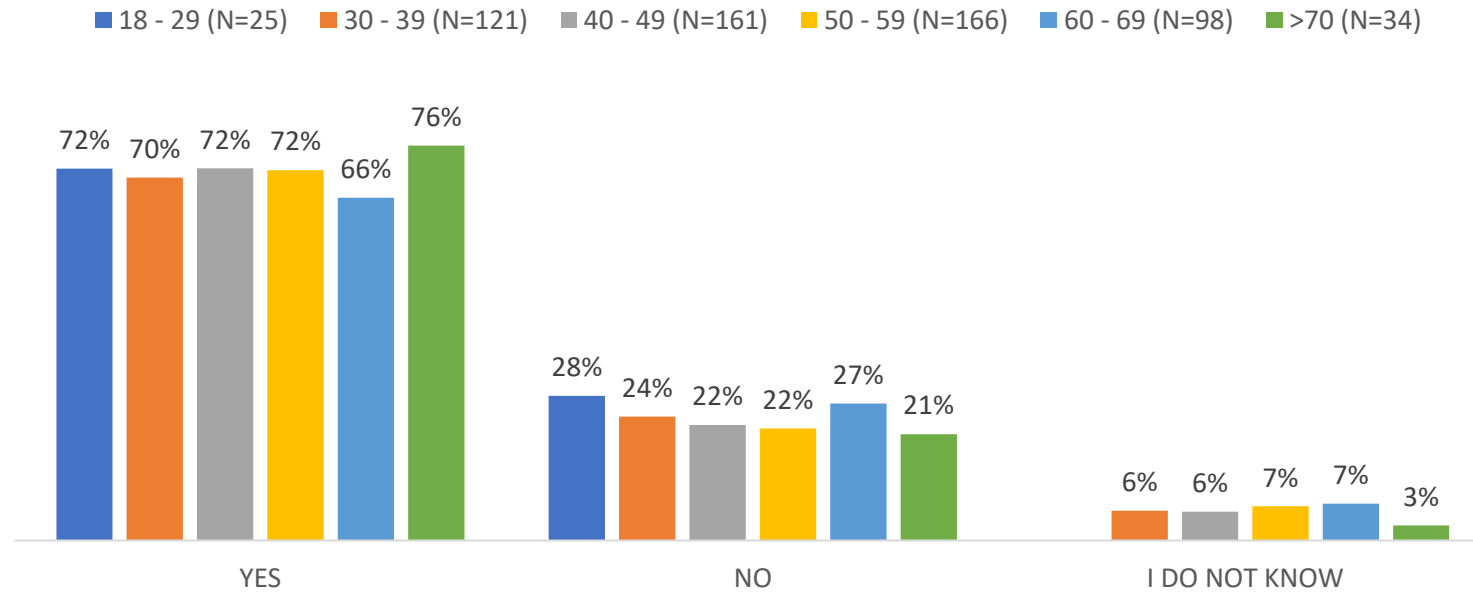
- The less preferred crop type for turning into eco exploitation is rapeseed, probably due to particular conditions linked to rape care and exploitation.



INTENTION ON REPLACING PESTICIDES

REPLACING PESTICIDES WITH ECO SUBSTANCES IN NEXT 3-5 YRS, DEPENDING ON FARMER AGE

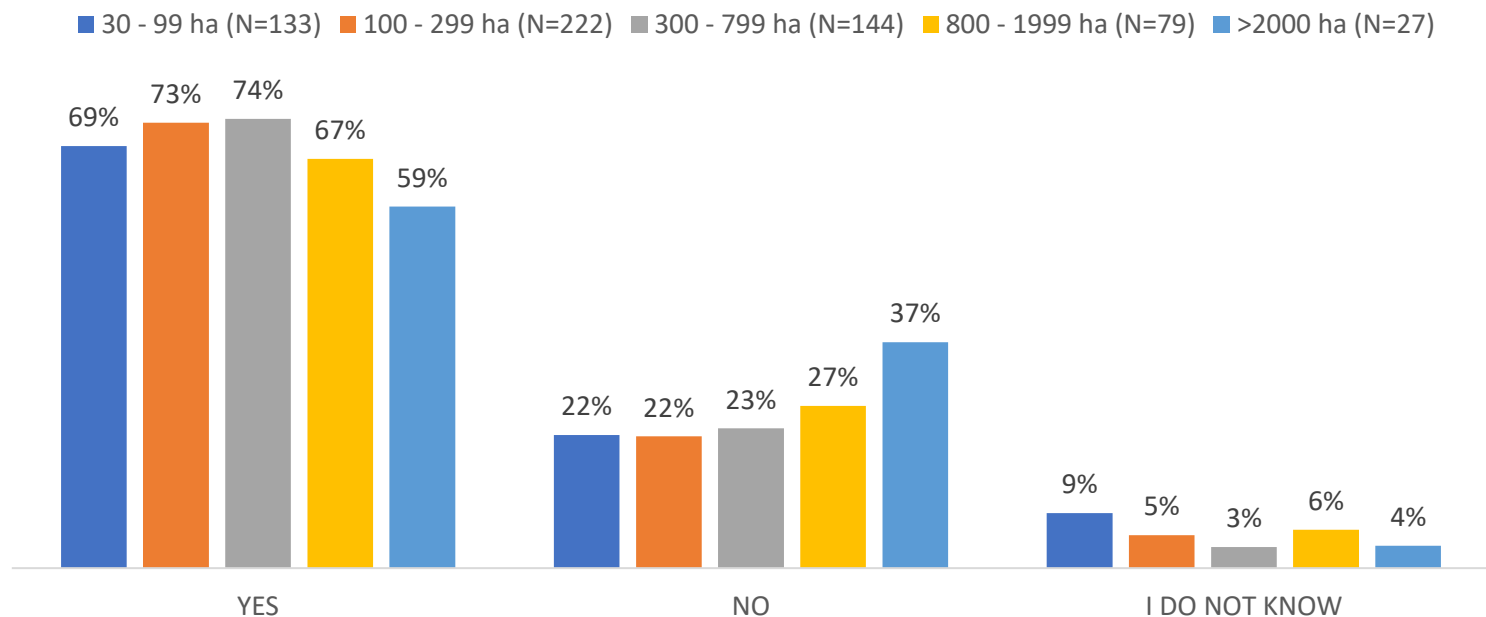
Replacing some of the pesticides used with eco substances and farming eco practices:



INTENTION ON REPLACING PESTICIDES

REPLACING PESTICIDES WITH ECO SUBSTANCES IN NEXT 3-5 YRS, DEPENDING ON FARM SIZE

Replacing some of the pesticides used with eco substances and farming eco practices:

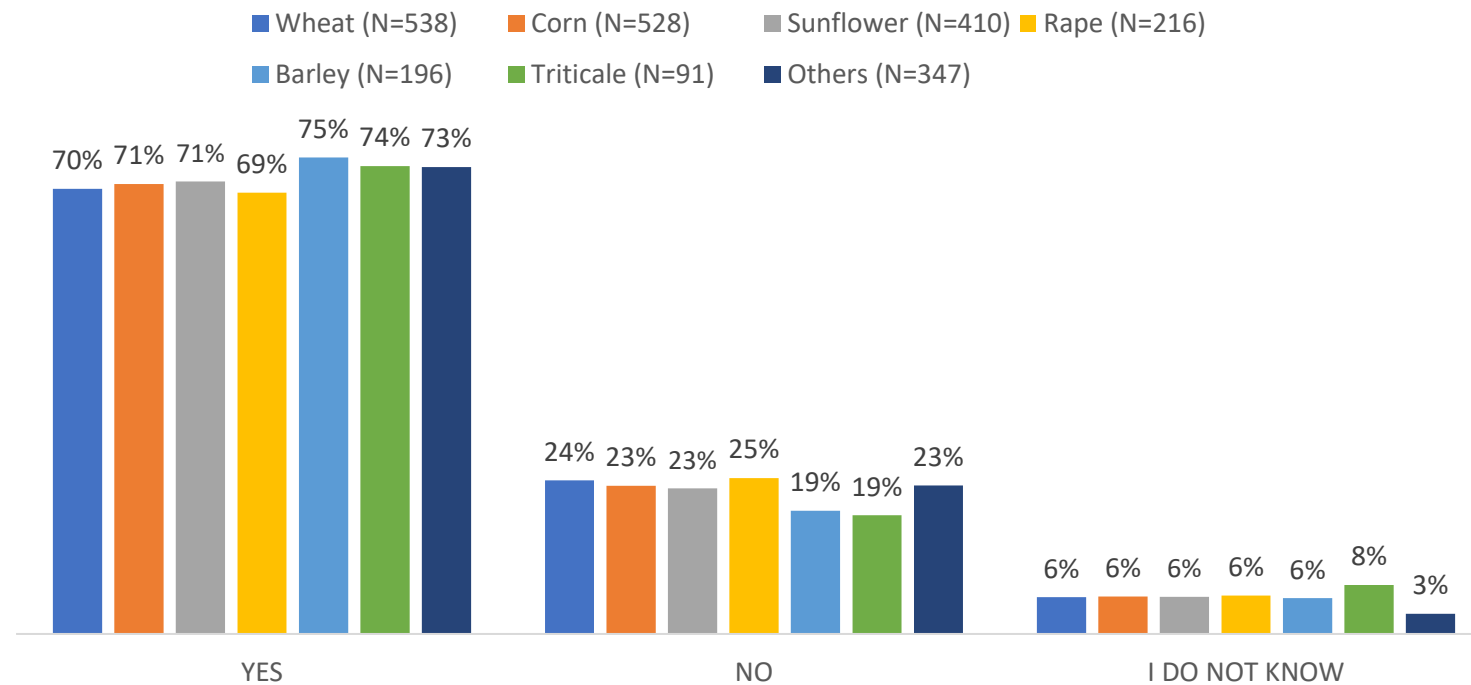


- The option for replacing the pesticides with eco substances decreases with the increase of farm size.

INTENTION ON REPLACING PESTICIDES

REPLACING PESTICIDES WITH ECO SUBSTANCES IN NEXT 3-5 YRS, DEPENDING ON CROP TYPE

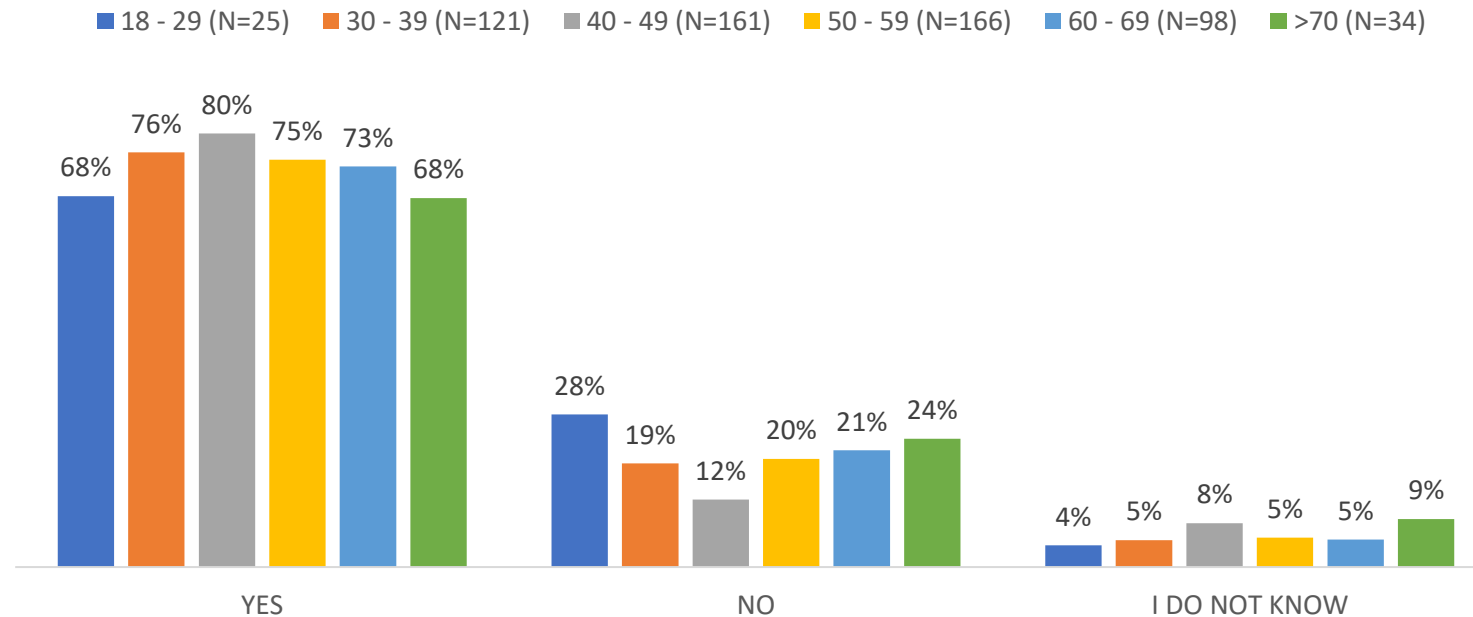
Replacing some of the pesticides used with eco substances and farming eco practices:



INTENTION ON REPLACING FERTILIZERS

REPLACING FERTILIZERS WITH ECO SUBSTANCES IN NEXT 3-5 YRS, DEPENDING ON FARMER AGE

Replacing some of the fertilizers with eco substances and farming eco practices:

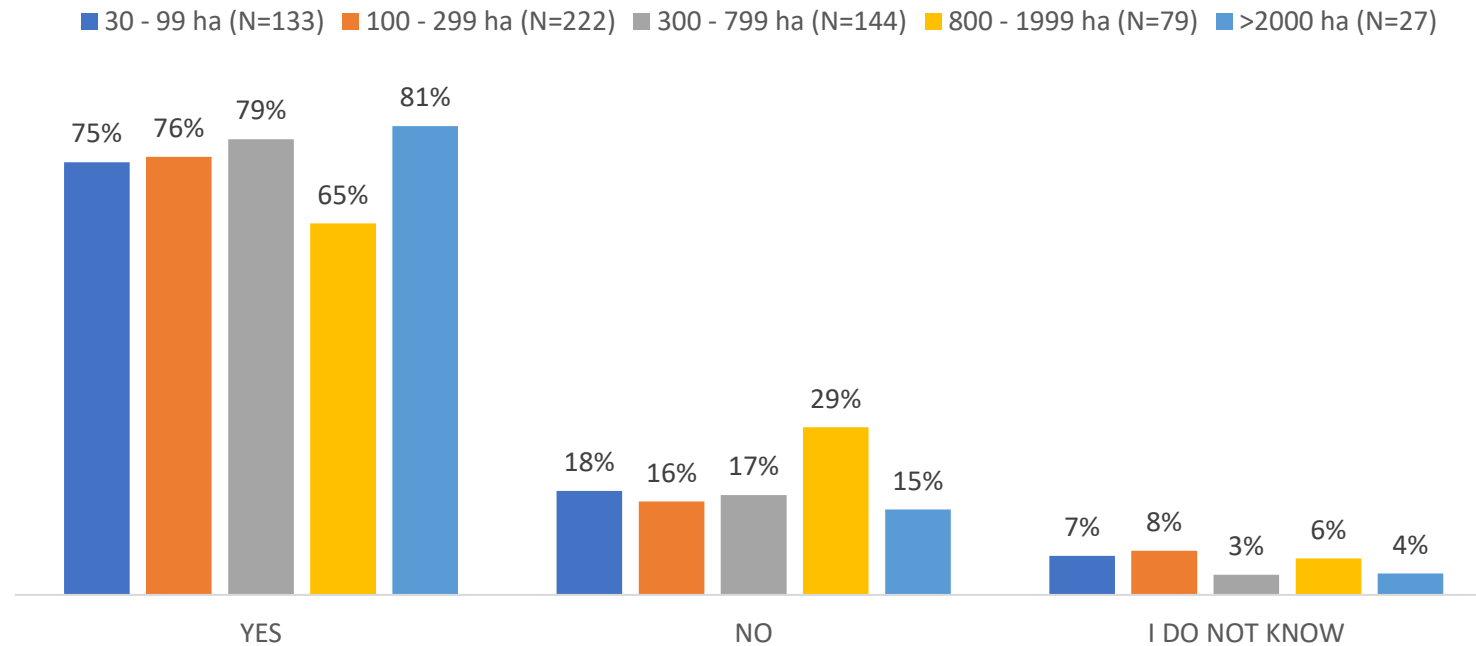


- The middle aged farmers are the ones that opt more for a change of fertilizers with eco-substances.

INTENTION ON REPLACING FERTILIZERS

REPLACING FERTILIZERS WITH ECO SUBSTANCES IN NEXT 3-5 YRS, DEPENDING ON FARM SIZE

Replacing some of the fertilizers with eco substances and farming eco practices:

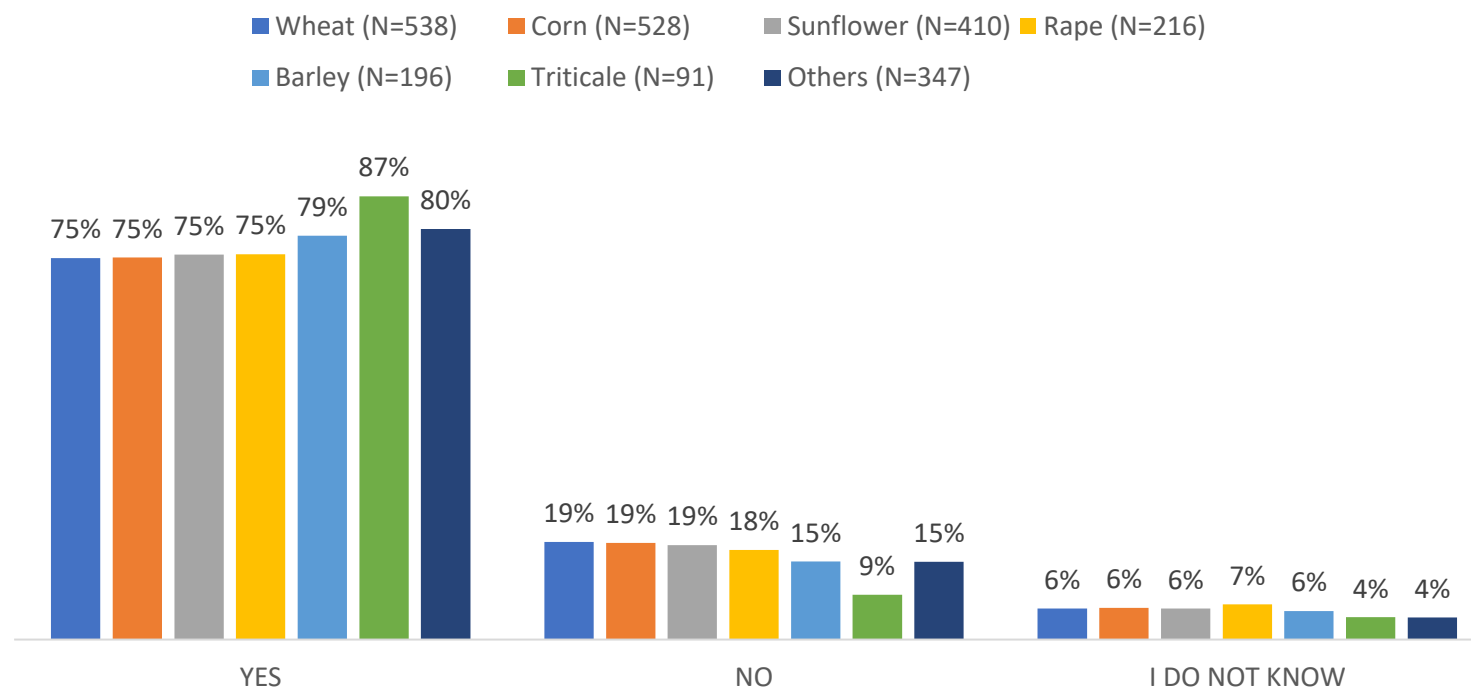


- Bigger farms (>800 hectares) tend to be more reluctant regarding changing the fertilizers with eco substances.

INTENTION ON REPLACING FERTILIZERS

REPLACING FERTILIZERS WITH ECO SUBSTANCES IN NEXT 3-5 YRS, DEPENDING ON CROP TYPE

Replacing some of the fertilizers with eco substances and farming eco practices:



- The most preferred crops for a replacement between fertilizers and eco substances are triticale, barley and other crops (such as vegetables, pastures, meadows) .

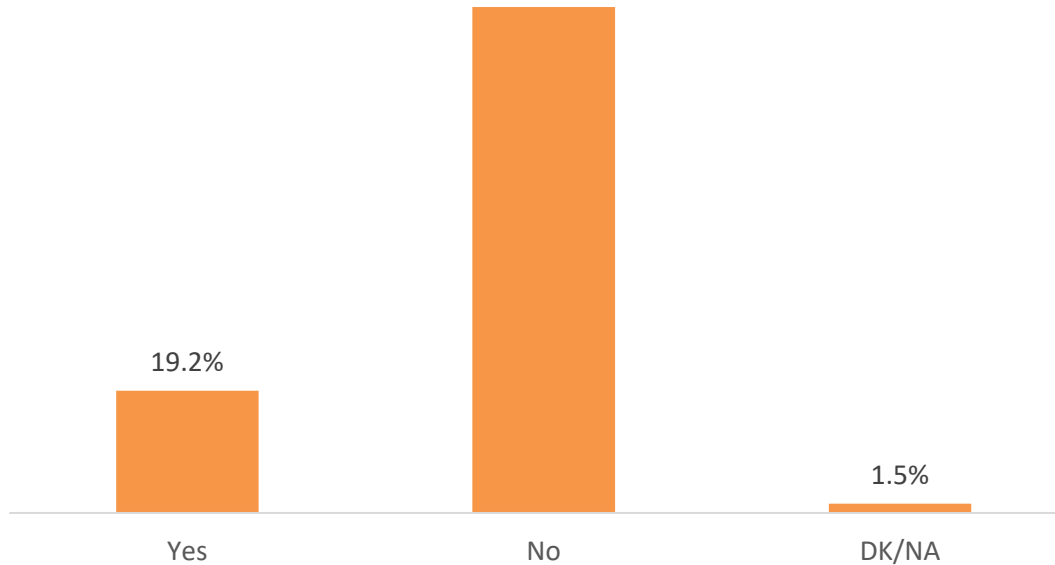
ECOLOGICAL CROP EXPLOITATION

ECOLOGICAL CROP EXPLOITATION, DEPENDING ON NO OF FARMS AND TOTAL CROP AREA

Do you grow ECOLOGICAL crops at the moment?

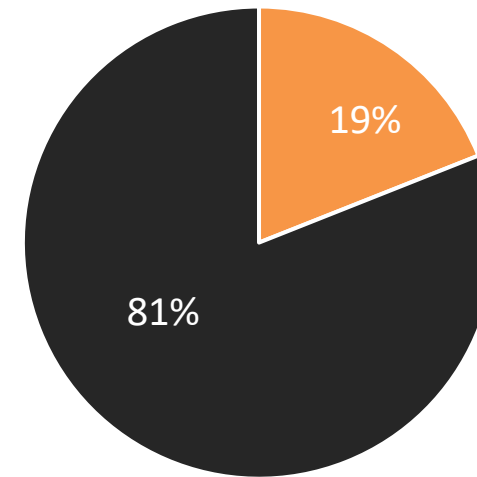
(N=605)

79.3%



Do you grow ECOLOGICAL crops at the moment?
(total area of farms which grow ecological crops related to total area of all farms - 287,3k ha)

■ Yes ■ No

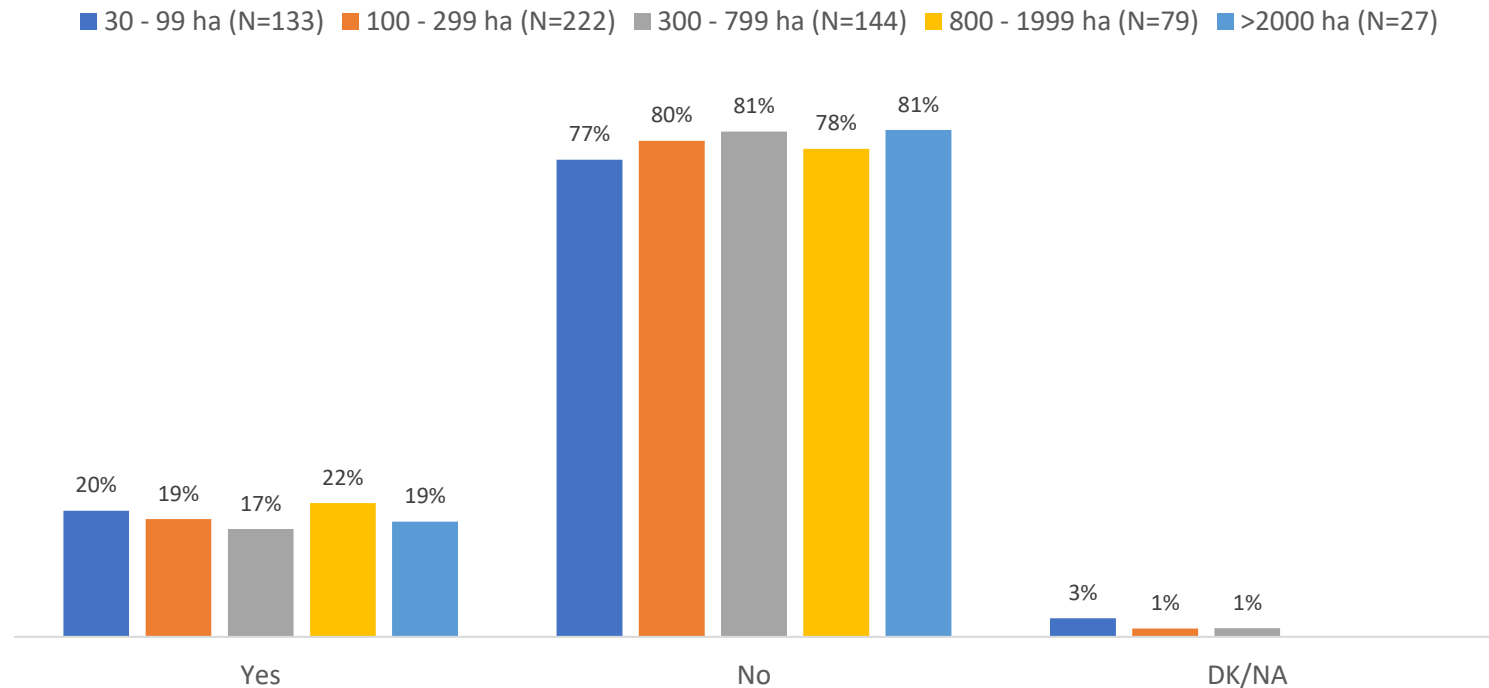


- Less than 20% of the total number of farms grow ecological crops. These farms operate a total area that represents approx 19% of the total analysed crop area.

ECOLOGICAL CROP EXPLOITATION

ECOLOGICAL CROP EXPLOITATION, DEPENDING ON FARM SIZE

Do you grow ECOLOGICAL crops at the moment?

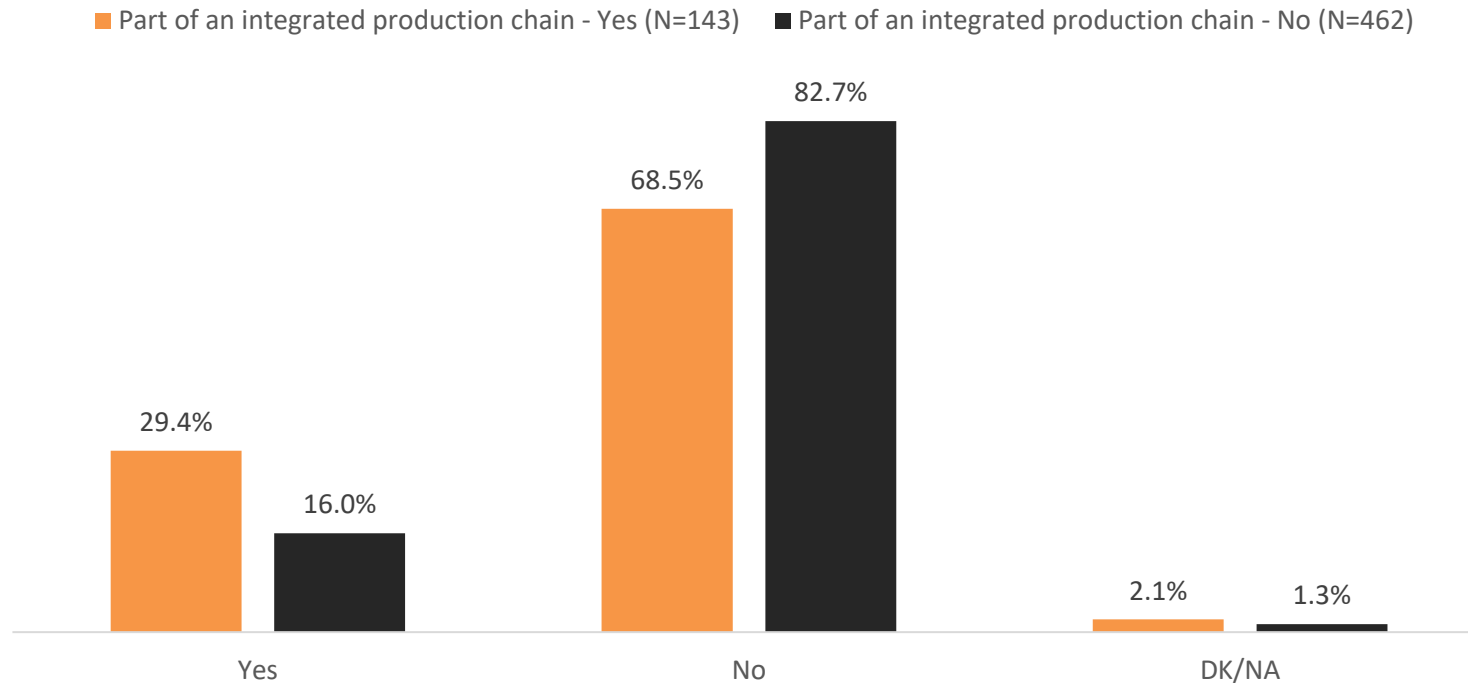


- There is a slight decrease in ecological crop exploitation correlated with the increase of farm size. **Bigger farms prefer conventional farming.**

ECOLOGICAL CROP EXPLOITATION

ECOLOGICAL CROP EXPLOITATION, DEPENDING ON INTEGRATED PRODUCER CHAIN MEMBERSHIP

Do you grow ECOLOGICAL crops at the moment?

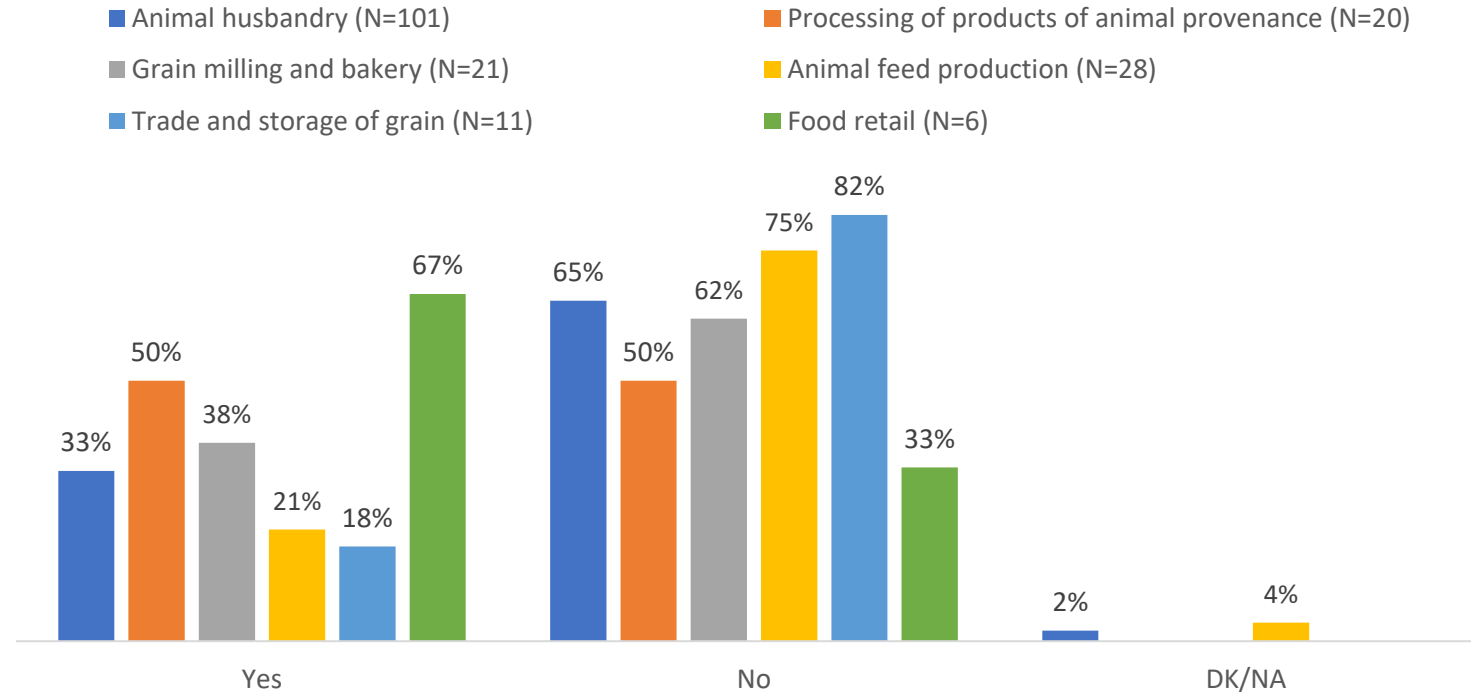


- **Farmers that are part of an integrated production chain opt more for ecological crop exploitation, possible due to direct access of consumer demand.**

ECOLOGICAL CROP EXPLOITATION

ECOLOGICAL CROP EXPLOITATION, DEPENDING ON INTEGRATED CHAIN TYPE

Do you grow ECOLOGICAL crops at the moment?

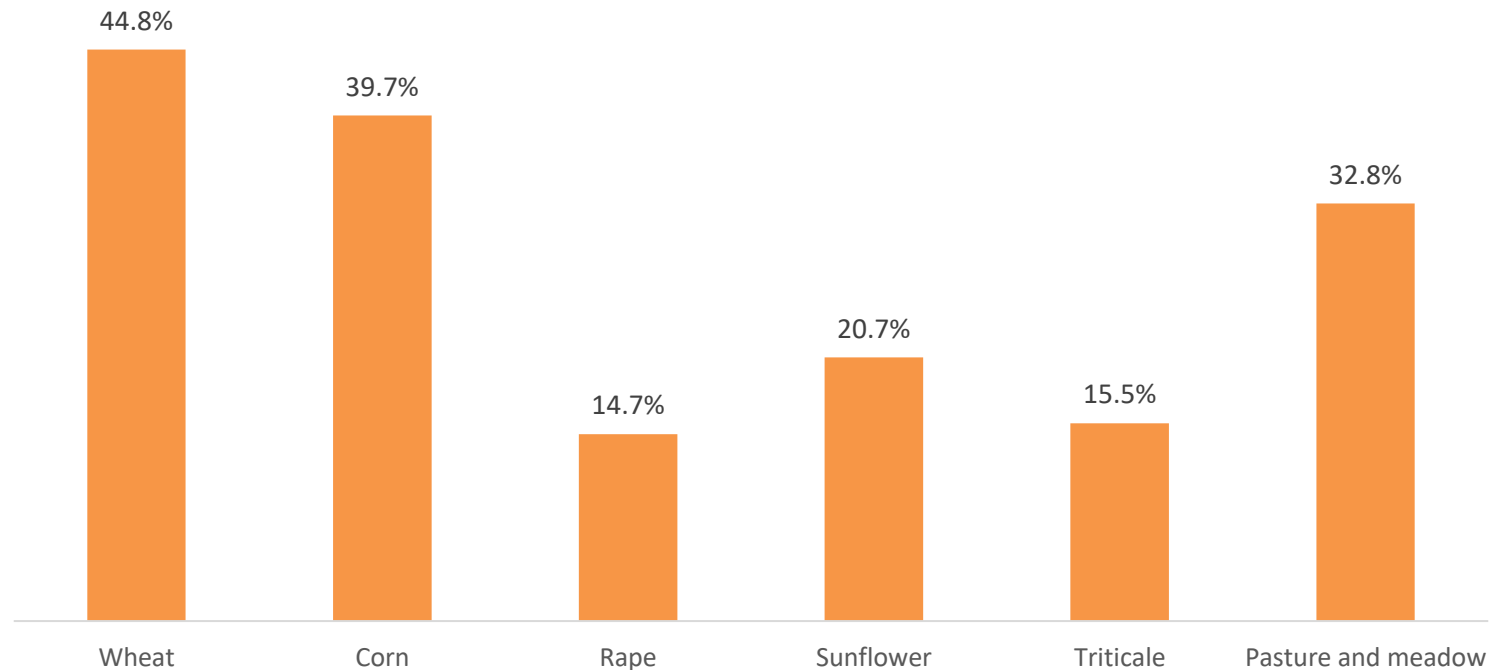


- Farmers that operate integrated chain memberships such as food retail and processing of products of animal provenience opt more for ecological crops exploitation.

ECOLOGICAL CROP EXPLOITATION

TYPE OF EXPLOITED CROPS, DEPENDING ON NO OF FARMS

What type of crop is cultivated in the ecological system?
(related to total farmers who grow ecological crops - N=116)

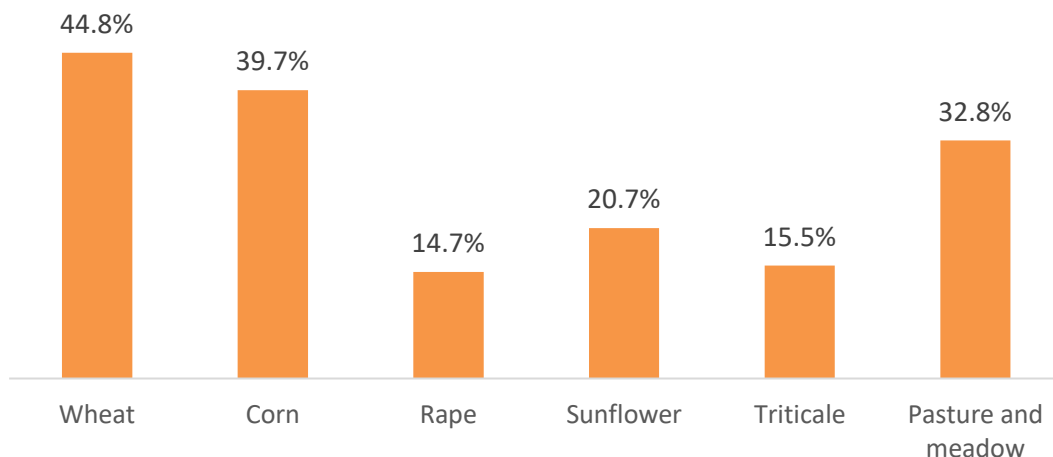


- The most preferred crops by the farmers to be exploited in ecological system are wheat and corn. On the other side, both rape and triticale are less preferred.

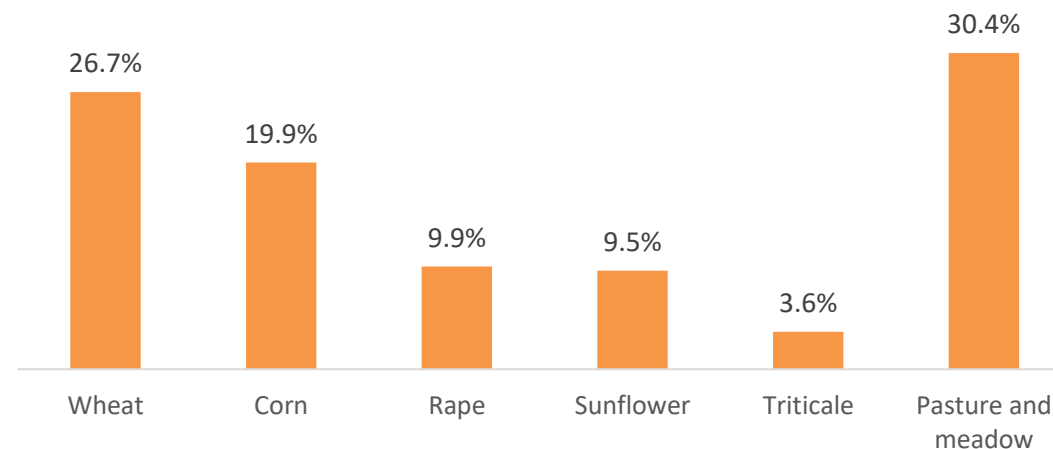
ECOLOGICAL CROP EXPLOITATION

TYPE OF EXPLOITED CROPS, DEPENDING ON NO OF FARMS and CROP SIZE

What type of crop is cultivated in the ecological system?
(related to total farmers who grow ecological crops - N=116)



What type of crop is cultivated in the ecological system?
(relative to total area with ecological crops - 8108 ha)

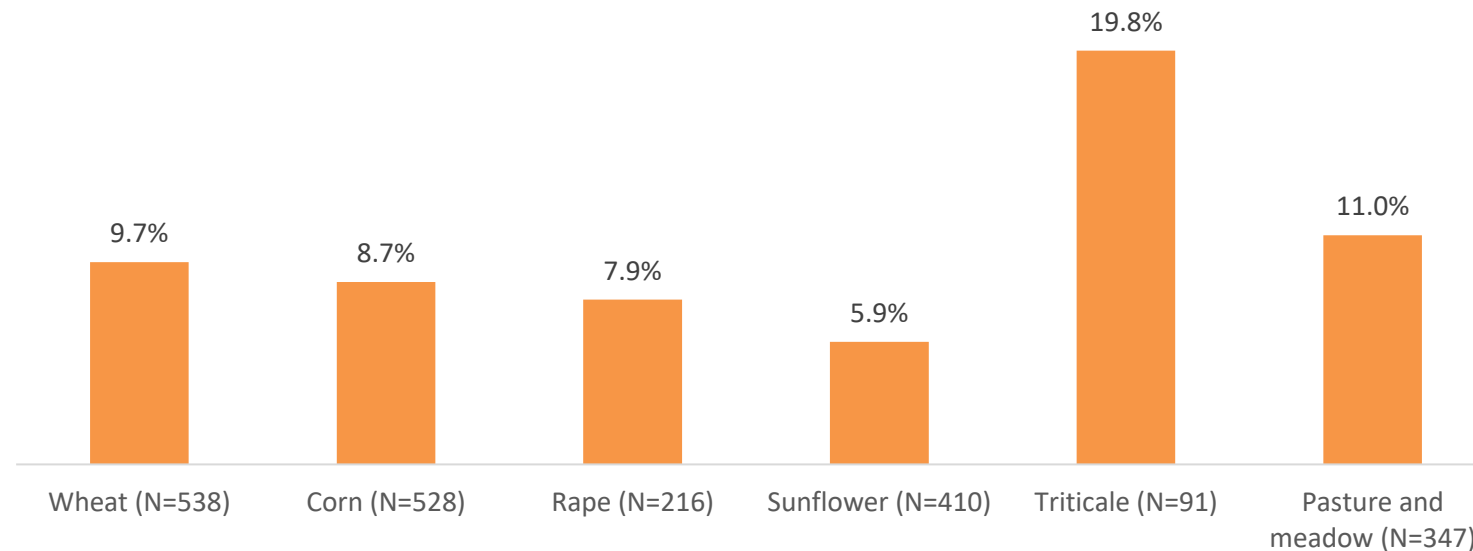


- The most preferred crops by the farmers to be exploited in ecological system are wheat and corn. On the other side, both rape and triticale are less preferred.
- Related to the **total area cultivated with ecological crops (8100 hectares, representing 3% of the total analysed area)**, the most preferred crop type for ecological exploitation is pasture and meadow.

ECOLOGICAL CROP EXPLOITATION

TYPE OF EXPLOITED CROPS, RELATED TO TOTAL NO OF FARMERS (THAT GROW EACH CROPS)

What type of crop is cultivated in the ecological system?
(related to total farmers who grow each crops)

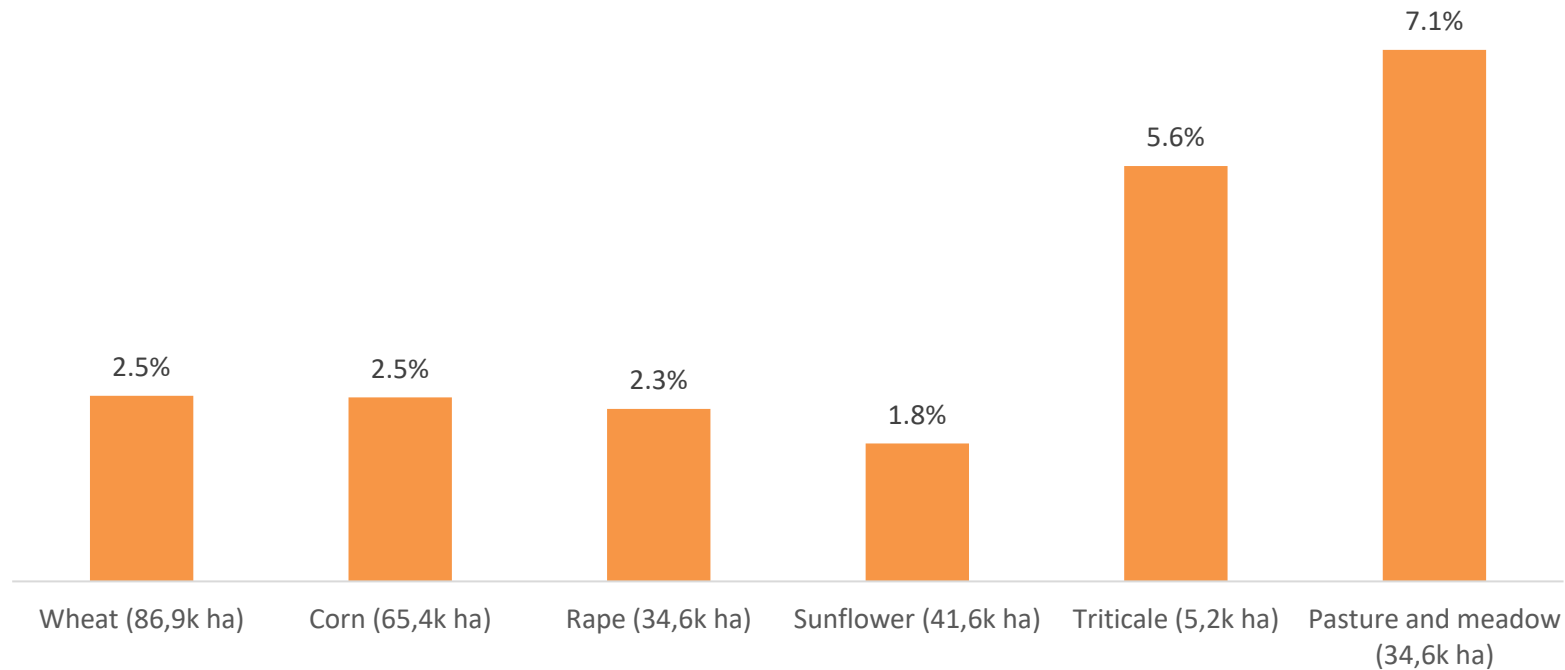


- Farmers that grow triticale tend to exploit more this type of crop in ecological system. The less exploited crops in ecological system are sunflower and rapeseed, meaning that exploiting these crops in conventional system might be more profitable.

ECOLOGICAL CROP EXPLOITATION

TYPE OF EXPLOITED CROPS, RELATED TO TOTAL CROP SIZE

What type of crop is cultivated in the ecological system?
(related to total area for each crops)



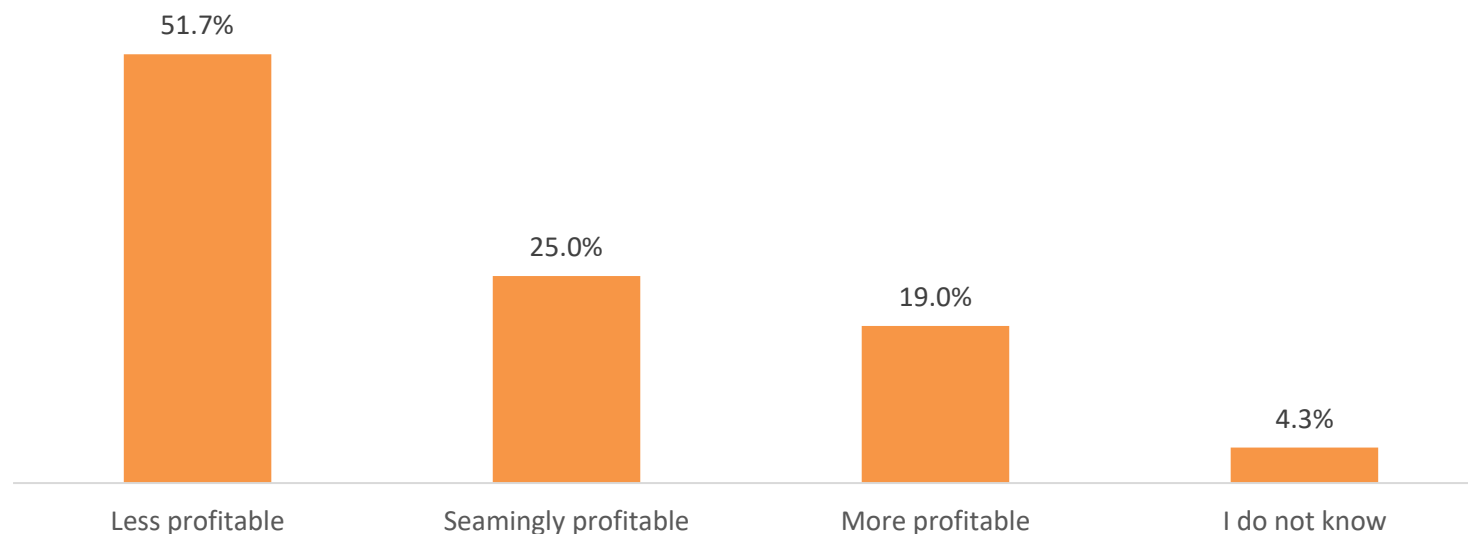
- The pasture and meadow are preferred more by bigger farms. While triticale are preferred by smaller farms.

ECOLOGICAL CROP PROFITABILITY

COMPARED TO THE CONVENTIONAL CROPS, RELATED TO NO OF FARMS (ECOLOGICAL)

Compared to the conventionally cultivated crops in your farm,
how profitable are the ecological crops?

(N=116)

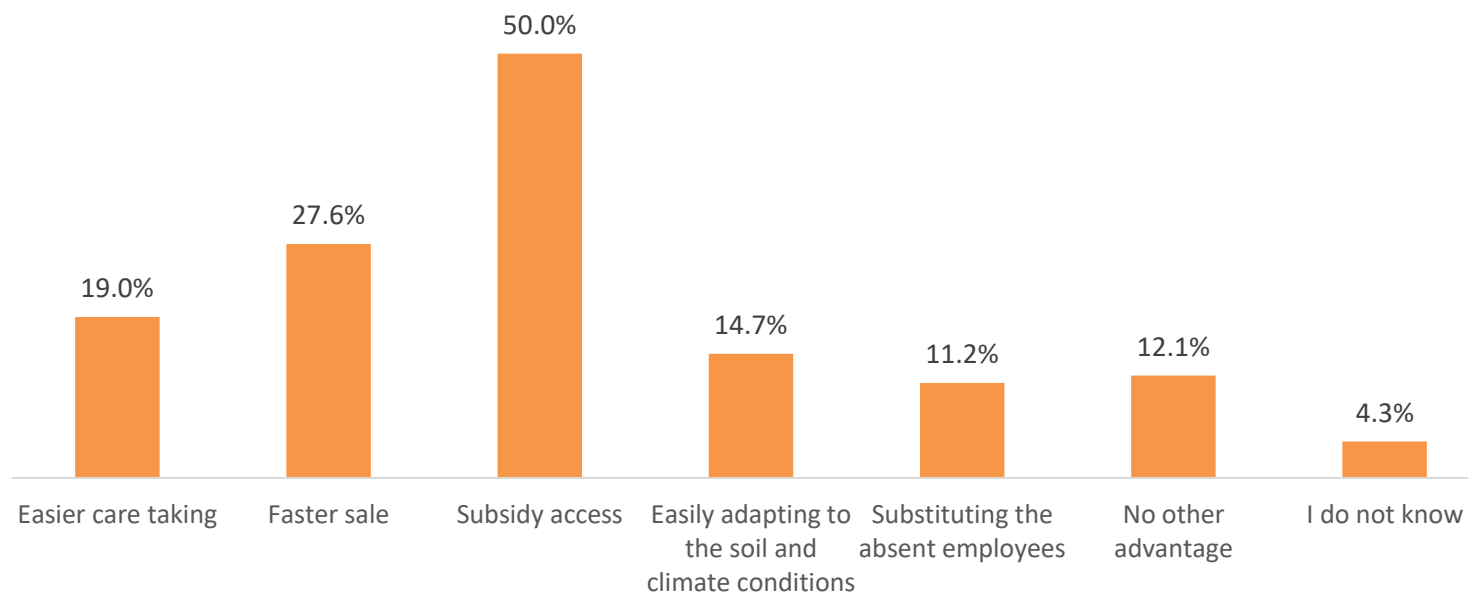


- **More than half of the farms that grow ecological crops think that these crops are less profitable than the conventional crops, while only 19% of the farms think that ecological crops are more profitable than conventional ones.**

ECOLOGICAL CROP ADVANTAGES

ADVANTAGES OF ECOLOGICAL CROPS, RELATED TO NO OF FARMS (ECOLOGICAL)

What other advantages can you spot at the ecological crops cultivation compared to the conventional ones in your farm?
(N=116)

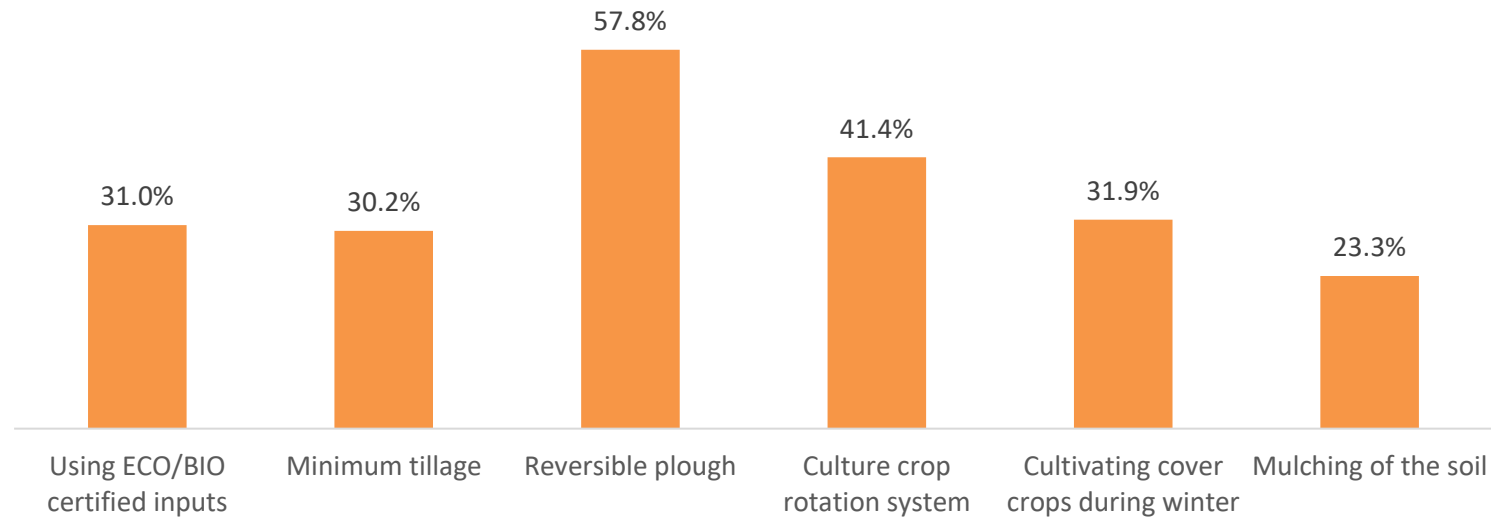


- The biggest advantage underlined by ecological crop growers is the subsidy access, followed by a faster sale and a easier care taking.

ECOLOGICAL CROP EXPLOITATION PRACTICES

TYPES OF PRACTICES USED IN EXPLOITING ECO, RELATED TO NO OF FARMS (ECOLOGICAL)

What practices and technologies do you use for the ecologically cultivated crops in your farm?
(N=116)

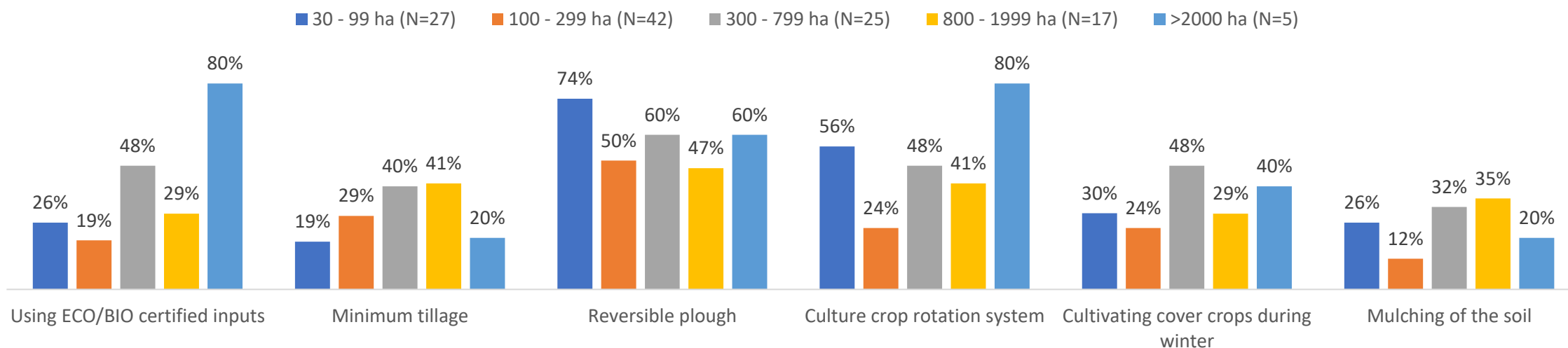


- The reversible plough is the most common practice used in eco exploiting crops, meaning that, from the technological point of view, Romanian farmers have a lot to develop regarding eco exploitation techniques.
- **Minimum tillage, which is one of the most profitable technologies used in eco exploitation is one of the less used techniques** regarding field crop eco exploitation.

ECOLOGICAL CROP EXPLOITATION PRACTICES

TYPES OF PRACTICES USED IN EXPLOITING ECO, RELATED TO FARM SIZE (ECOLOGICAL)

What practices and technologies do you use for the ecologically cultivated crops in your farm?

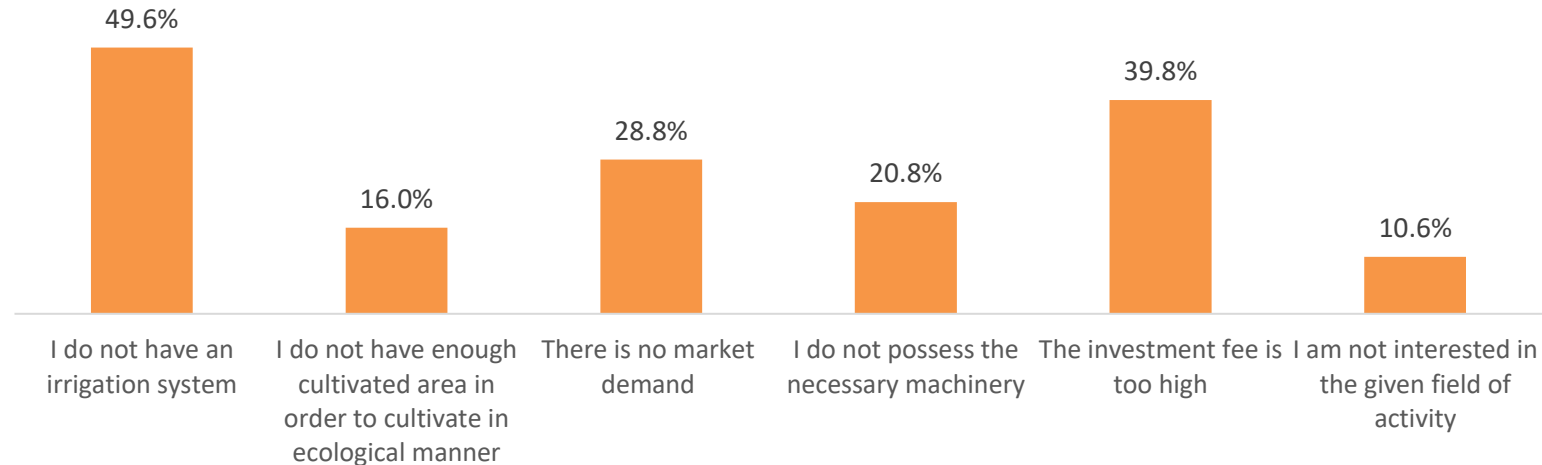


- By the increase of the farm size, minimum tillage exploitation increases, while reversible plough is present most among smaller farmers.
- There seems to be a huge preference among bigger farms (>2000 hectares) for using BIO/ECO certified inputs.

NON-ECOLOGICAL CROP EXPLOITATION

REASONS FOR NON ECOLOGICAL EXPLOITATION, RELATED TO NO OF FARMS (NON-ECOLOGICAL)

What have been the reasons for which you did not cultivate ecological crops until now?
(N=480)

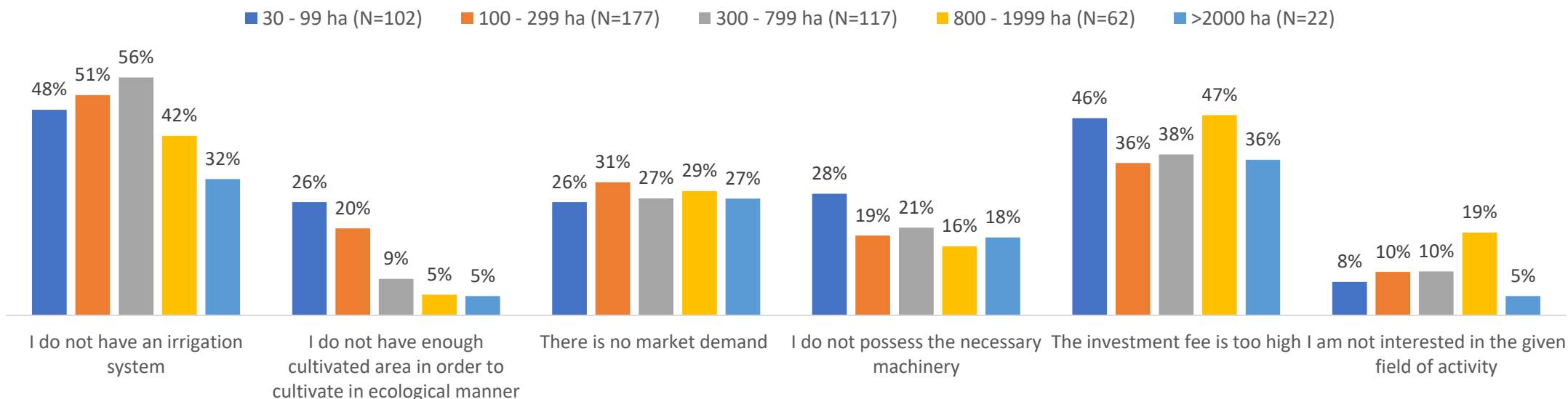


- Lack of water seems to be the key element into retaining farmers for turning to ecological exploitation. We must keep in mind that 2020 has been severely affected by the draught. Another key element is the perception that exploiting eco crops is more expensive than conventional crops.

NON-ECOLOGICAL CROP EXPLOITATION

REASONS FOR NON ECOLOGICAL EXPLOITATION, RELATED TO FARM SIZE (NON-ECOLOGICAL)

What have been the reasons for which you did not cultivate ecological crops until now?

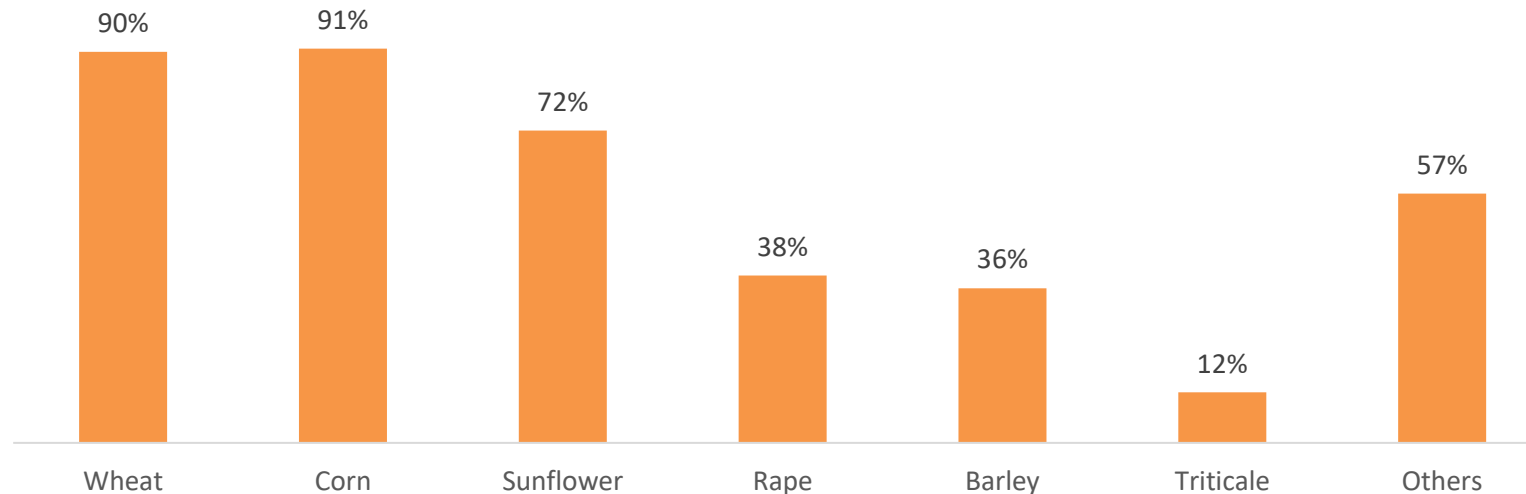


- Both lack of irrigation and lack of cultivated area represent reasons for choosing non-ecological exploitation that are present especially among small farmers. This could be interpreted that:
 - **If irrigation would be less expensive for small farmers, more of these could be able to grow ecological crops.**
 - **If the farm crop size would be bigger (if Romanian farms would be more merged), more farms could turn to eco exploitation.**

MARKET DEMAND FOR ECO EXPLOITATION

TYPE OF CROPS RELATED TO MARKET DEMAND, RELATED TO NO OF FARMS (NON-ECOLOGICAL)

What have been the reasons for which you did not cultivate ecological crops until now?
There is no market demand.



- There is a better market demand for ecological crops for barley and triticale.

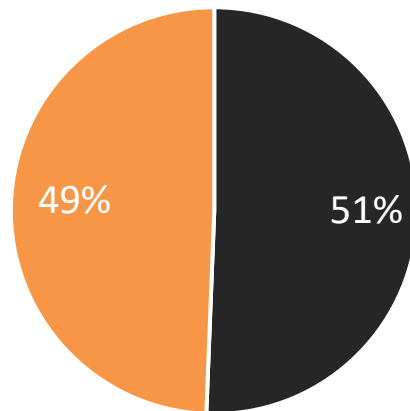
AWARENESS REGARDING TRANSITION TO ECO EXPLOITATION

AWARENESS ABOUT TURNING TO ECO, RELATED TO NO OF FARMS AND FARM SIZE (NON-ECOLOGICAL)

Are you aware of the legally mandatory steps for the scenario in which you want to make the transition in the ecological agriculture?

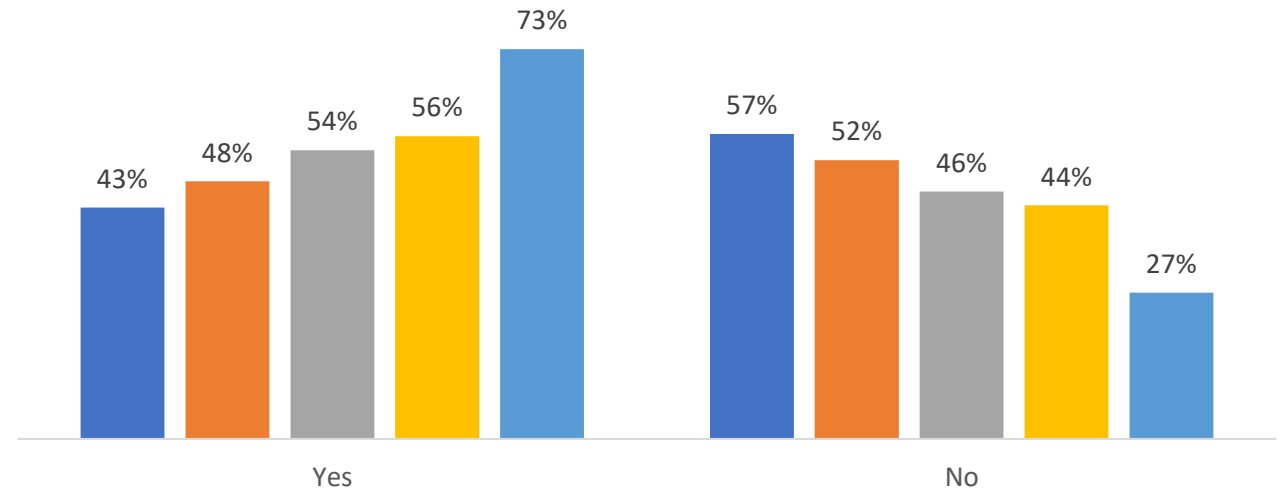
(N=480)

■ Yes ■ No



Are you aware of the legally mandatory steps for the scenario in which you want to make the transition in the ecological agriculture?

■ 30 - 99 ha (N=102) ■ 100 - 299 ha (N=177) ■ 300 - 799 ha (N=117)
■ 800 - 1999 ha (N=62) ■ >2000 ha (N=22)

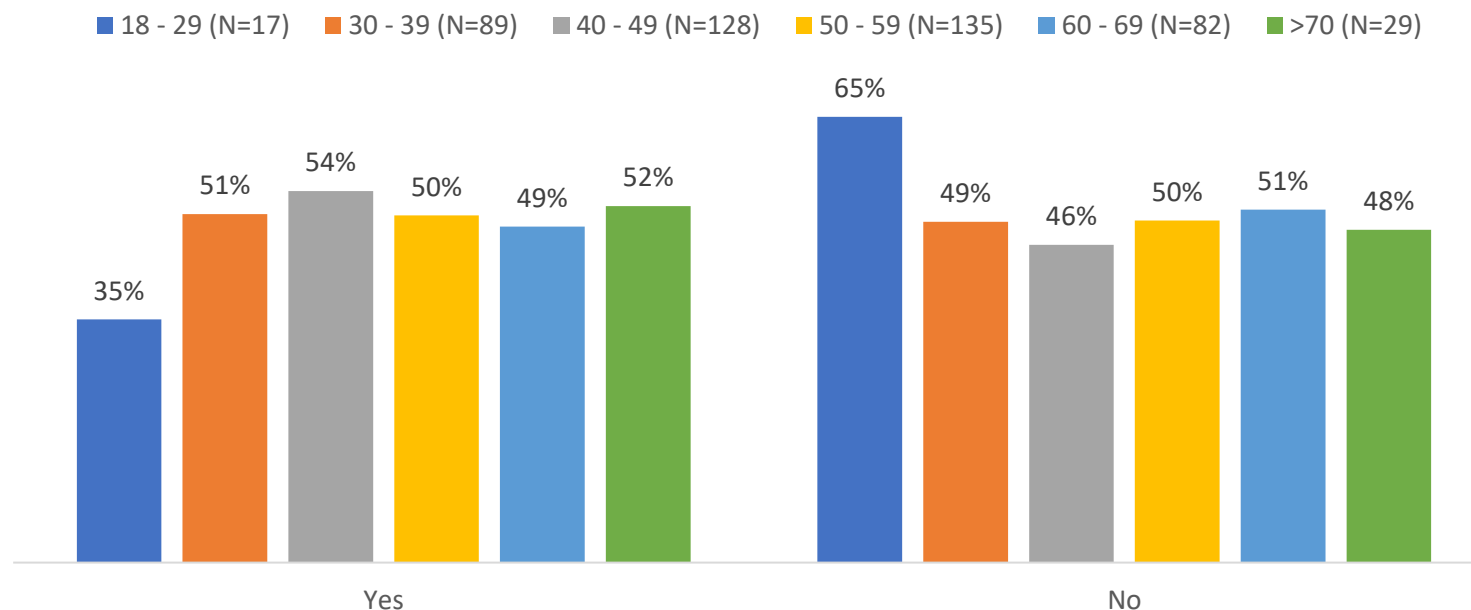


- Almost half of the farmers that do not grow eco crops at the moment are not aware of the necessary steps needed for a transition to eco exploitation.
- Smaller farms are less aware of the needed steps

AWARENESS REGARDING TRANSITION TO ECO EXPLOITATION

AWARENESS ABOUT TURNING TO ECO, RELATED TO FARMER AGE (NON-ECOLOGICAL)

Are you aware of the legally mandatory steps for the scenario in which you want to make the transition in the ecological agriculture?

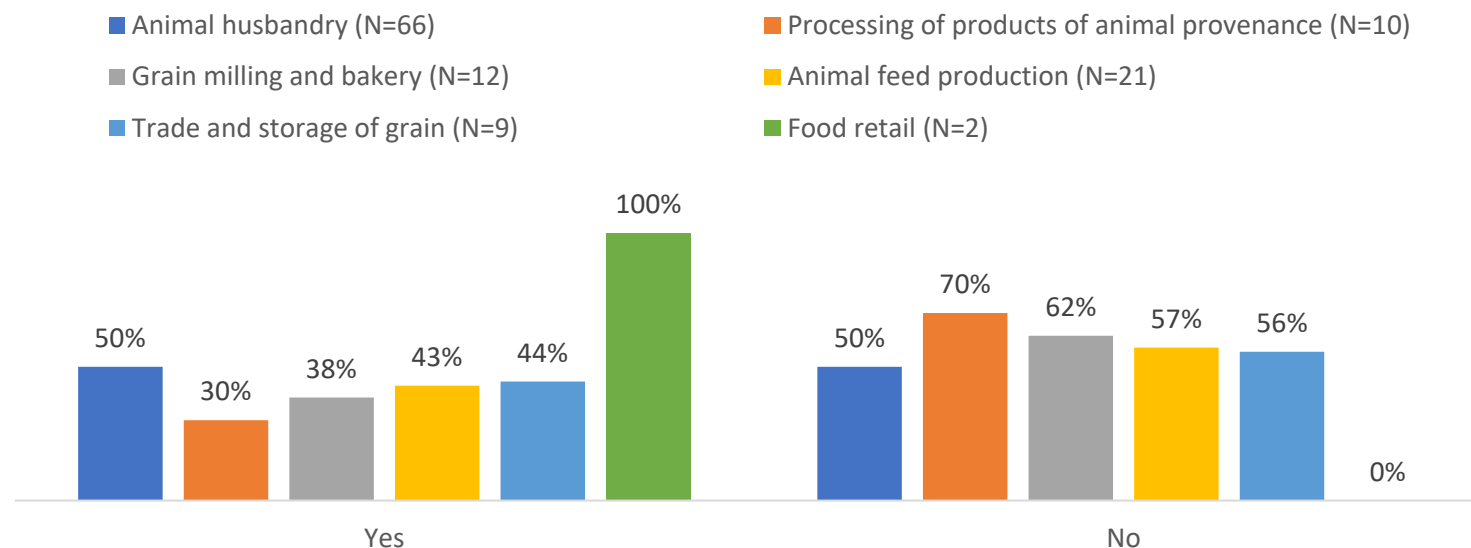


- The less informed category of farmers is the young ones.

AWARENESS REGARDING TRANSITION TO ECO EXPLOITATION

AWARENESS ABOUT TURNING TO ECO, RELATED TO INTEGRATED PRODUCER CHAIN MEMBERSHIP (NON-ECOLOGICAL)

Are you aware of the legally mandatory steps for the scenario in which you want to make the transition in the ecological agriculture?

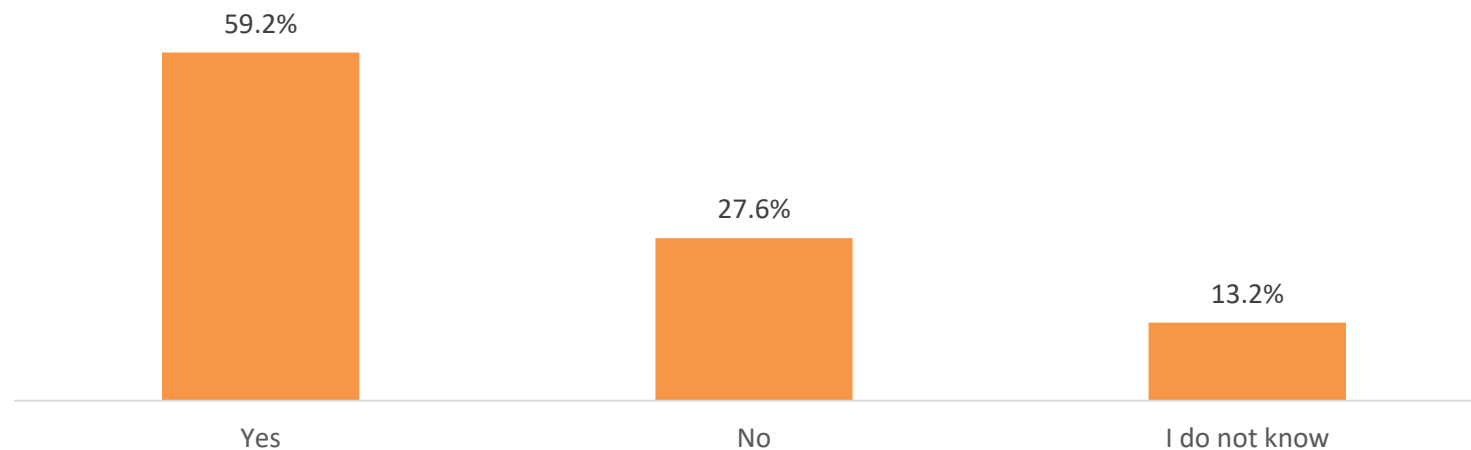


- The less informed category of is the ones that are members of chains that are processing products of animal provenience.

REDUCING PESTICIDES AND FERTILIZERS

REDUCING PESTICIDES AND FERTILIZERS BY 2030, RELATED TO NO OF FARMS

Do you believe that the CAP provision concerning the 50% decrease for the pesticides and 20% for the fertilizers until 2030 could be successfully implemented in your farm?
(N=605)

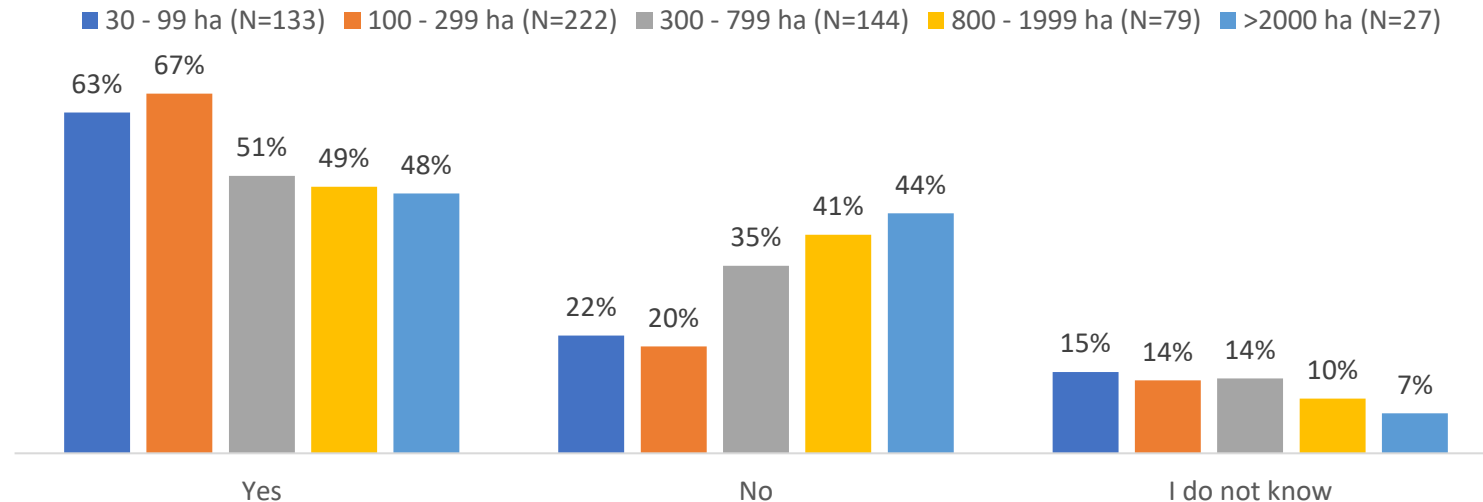


- Almost 60% of the farmers believe that the decrease in use of pesticides by 50% and in use of fertilizers by 20\$ until 2030 could be successfully implemented, **a pattern that can be described as optimistic.**

REDUCING PESTICIDES AND FERTILIZERS

REDUCING PESTICIDES AND FERTILIZERS BY 2030, RELATED TO FARM SIZE

Do you believe that the CAP provision concerning the 50% decrease for the pesticides and 20% for the fertilizers until 2030 could be successfully implemented in your farm?

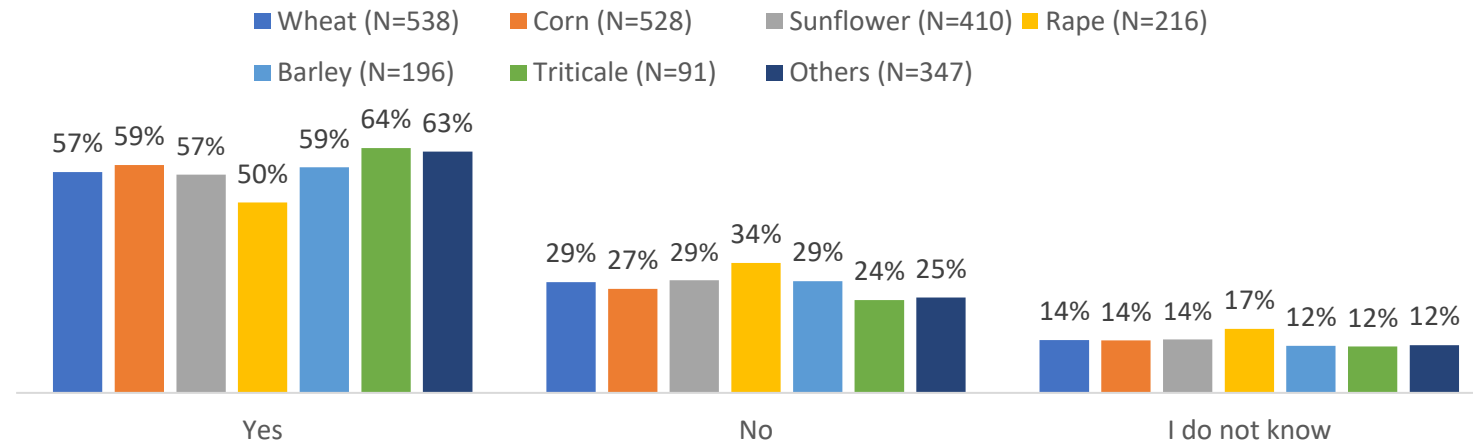


- The bigger the farm is, the more reluctant the farmer becomes regarding the reduction by 50% of the used pesticides and by 20% of the used fertilizers until 2030. **Bigger farms are more pessimistic.**

REDUCING PESTICIDES AND FERTILIZERS

REDUCING PESTICIDES AND FERTILIZERS BY 2030, RELATED TO TYPE OF CROP

Do you believe that the CAP provision concerning the 50% decrease for the pesticides and 20% for the fertilizers until 2030 could be successfully implemented in your farm?

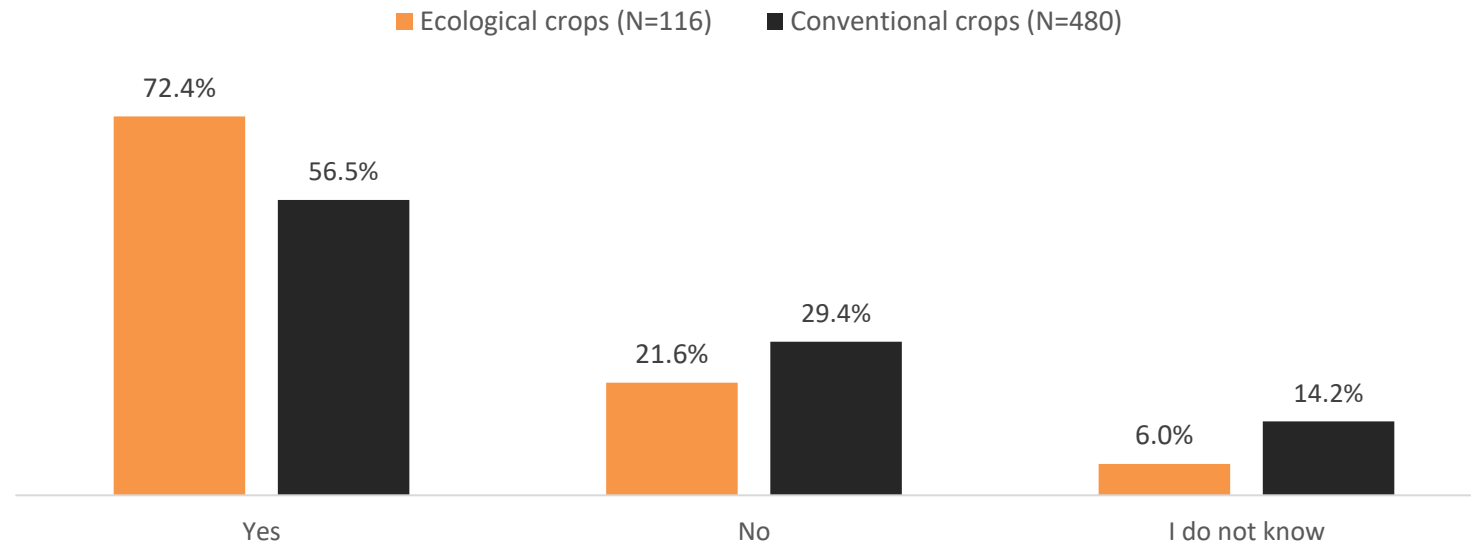


- Again, farmers believe that rapeseed crop does not fit with the goal of reducing pesticides and fertilizers.

REDUCING PESTICIDES AND FERTILIZERS

REDUCING PESTICIDES AND FERTILIZERS BY 2030, RELATED TO ECO / NON-ECO CROP EXPLOITATION

Do you believe that the CAP provision concerning the 50% decrease for the pesticides and 20% for the fertilizers until 2030 could be successfully implemented in your farm?

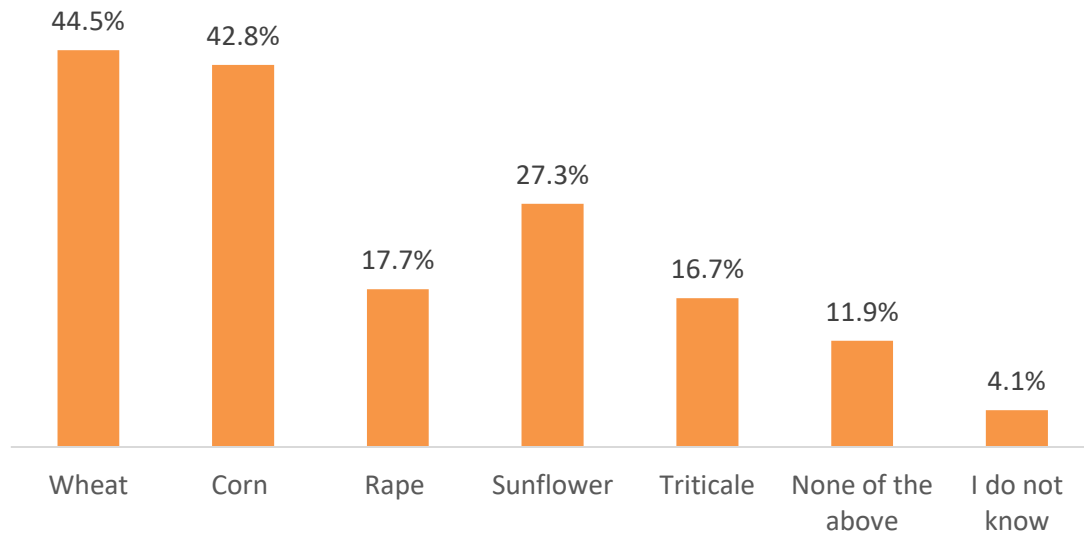


- Compared to the conventional growers, the farmers that grow ecological crops tend to believe more that reducing pesticides and fertilizers could be implemented by 2030. **The ones that tried it, believe more.**

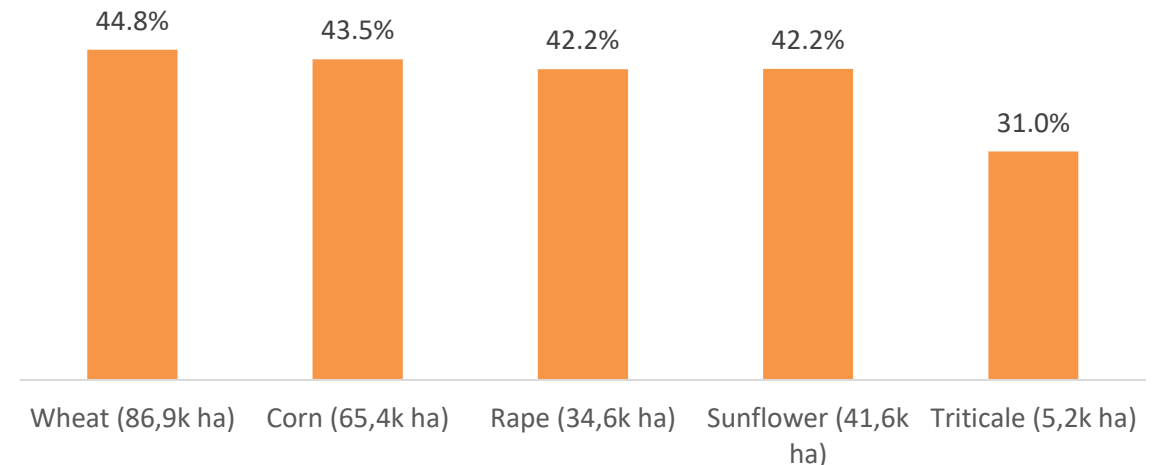
REDUCING PESTICIDES AND FERTILIZERS

TYPE OF CROPS PREFERRED, RELATED TO NO OF FARMS AND CROP SIZE

Which of the cultivated crops do you think will be the most suitable for the decrease of pesticides and fertilizers?
(N=605)



Which of the cultivated crops do you think will be the most suitable for the decrease of pesticides and fertilizers?
(area for each crop related to total area for each crop)

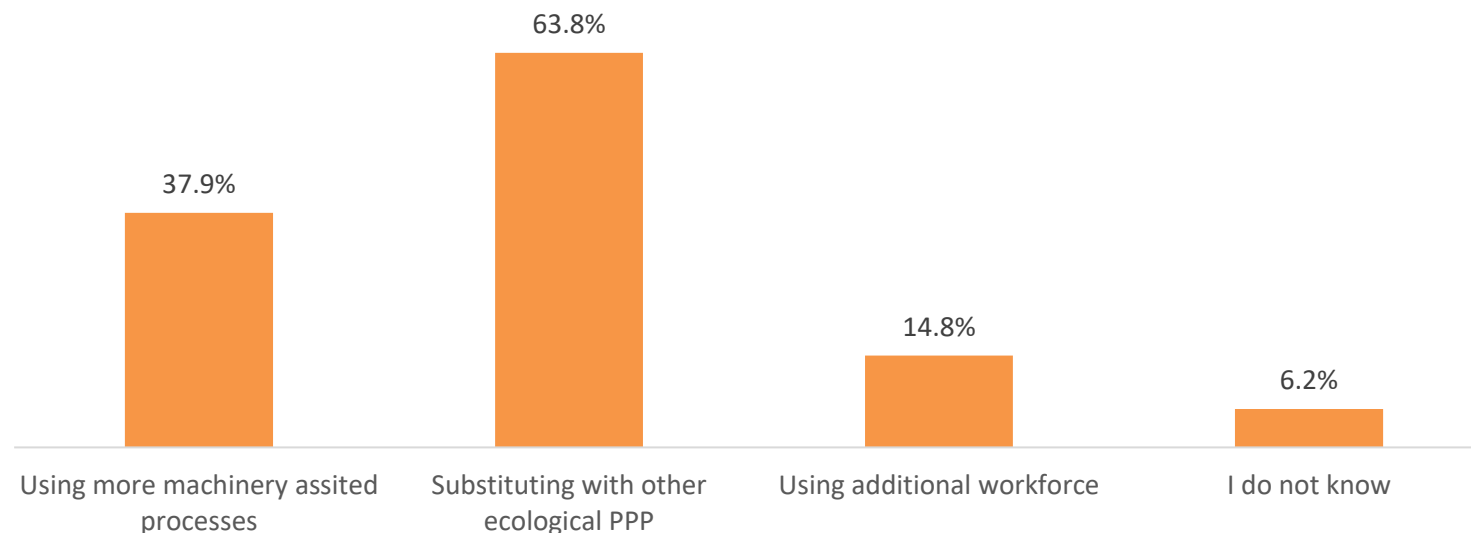


- Farmers think that wheat and corn are the most suitable type of crops that can be accommodated with pesticide and fertilizer reduction. Meanwhile, rape crop is characterised as a hard to accommodate crop to reducing pesticides and fertilizers, especially by smaller farms.

REDUCING PESTICIDES AND FERTILIZERS

REPLACEMENT OPTIONS , RELATED TO NO OF FARMS

What do you think will substitute the decrease of fertilizers and pesticides used on your farm?
(N=533)

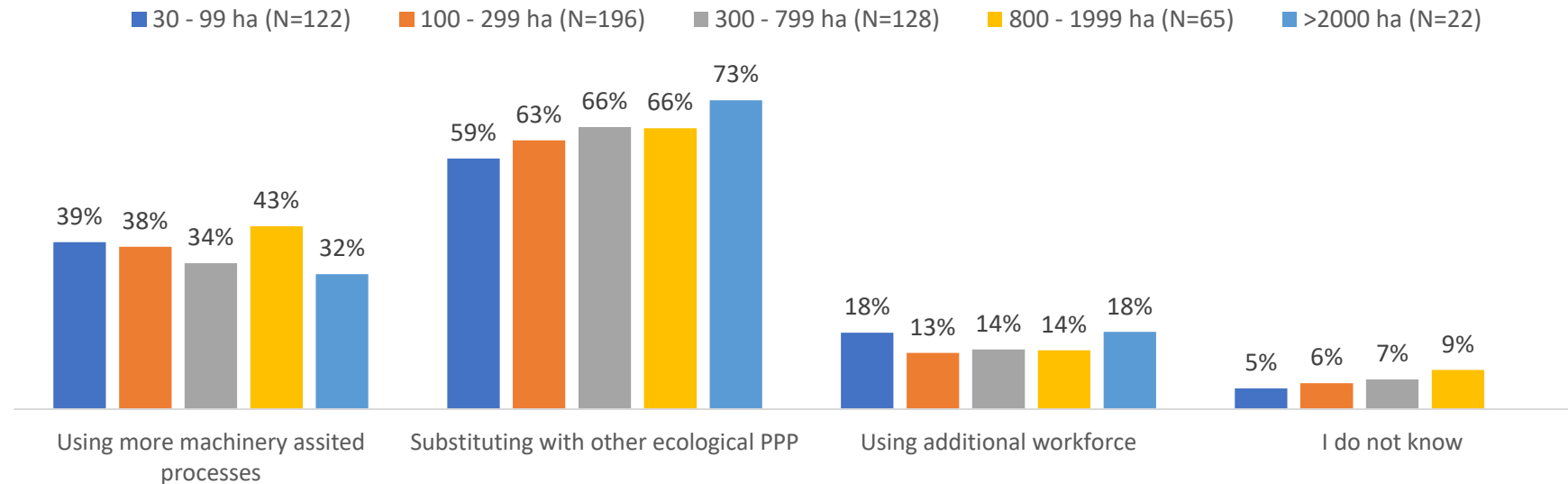


- Substituting with other PPP remains the main option for decreasing the quantity of pesticides and fertilizers currently used. The second substitute is represented by using more machinery.

REDUCING PESTICIDES AND FERTILIZERS

REPLACEMENT OPTIONS , RELATED TO FARM SIZE

What do you think will substitute the decrease of fertilizers and pesticides used on your farm?



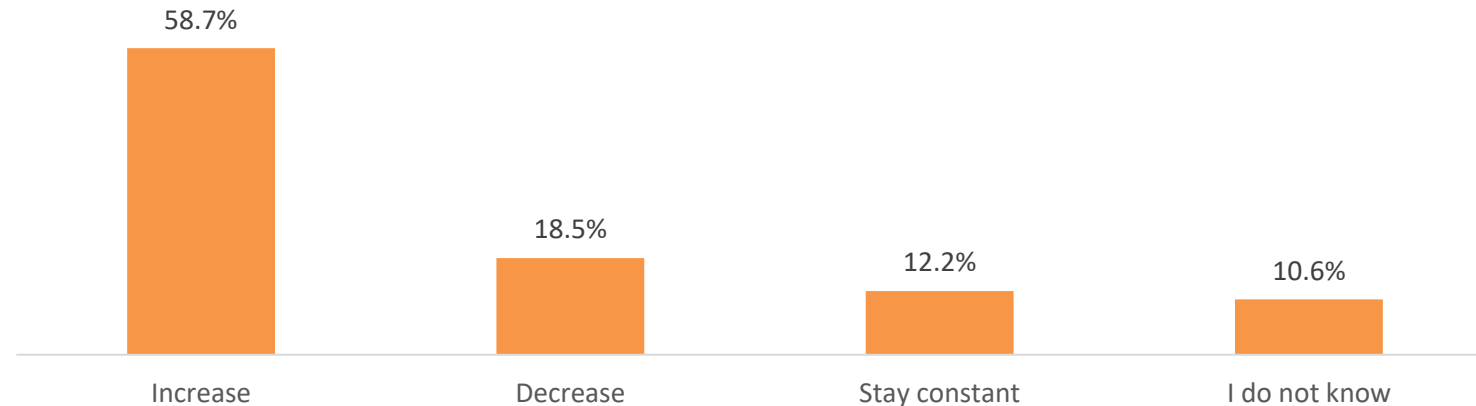
- Bigger farms realize that using more machinery assisted processes for replacing the user of pesticides and fertilizers is not a suitable option. The bigger the farms is, the smaller this option becomes.

REDUCING PESTICIDES AND FERTILIZERS

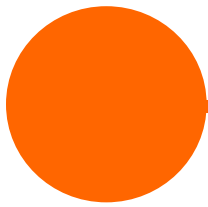
MAINTAINING PRODUCTIVITY, RELATED TO NO OF FARMS

If you needed to reduce the used pesticides by 50% and the used fertilizers by 20% in order to maintain the same productivity that you have at the moment, you think your operating costs of the farm will:

(N=605)



- Almost 60% of the farmers believe that farm internal operating cost will increase if they will have to reduce the use of pesticides and fertilizers. **One of the real substitute for this might be the digital agriculture, that will be able to increase efficiency.**

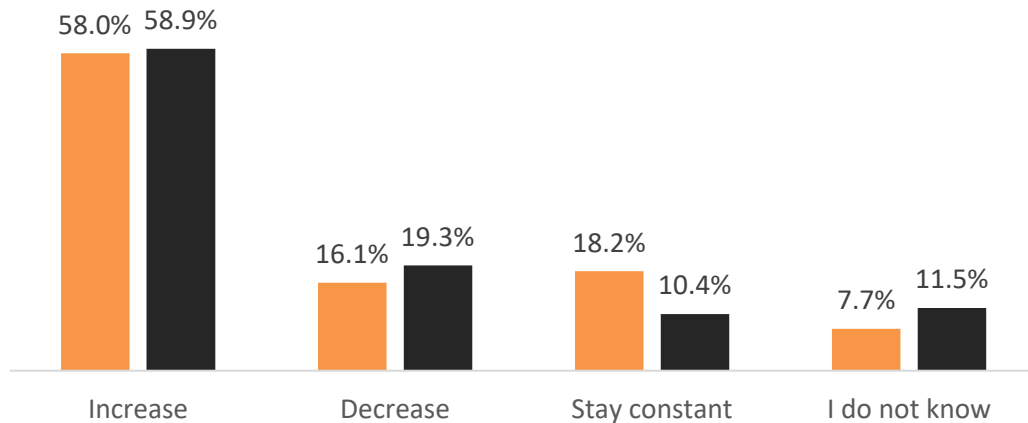


REDUCING PESTICIDES AND FERTILIZERS

MAINTAINING PRODUCTIVITY, RELATED TO FARM SIZE AND INTEGRATED CHAIN MEMBERSHIP

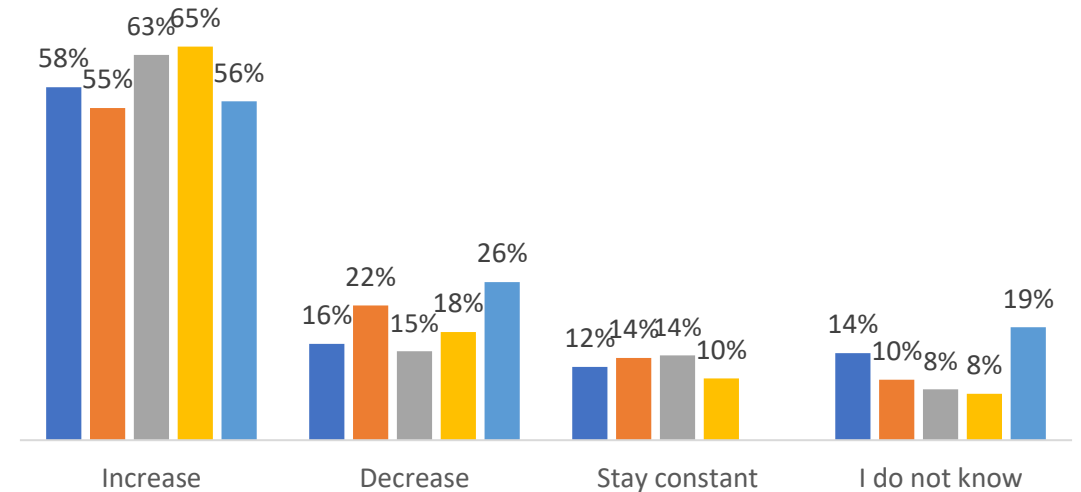
If you needed to reduce the used pesticides by 50% and the used fertilizers by 20% in order to maintain the same productivity that you have at the moment, you think your operating costs of the farm will:

- Part of an integrated production chain - Yes (N=143)
- Part of an integrated production chain - No (N=462)



If you needed to reduce the used pesticides by 50% and the used fertilizers by 20% in order to maintain the same productivity that you have at the moment, you think your operating costs of the farm will:

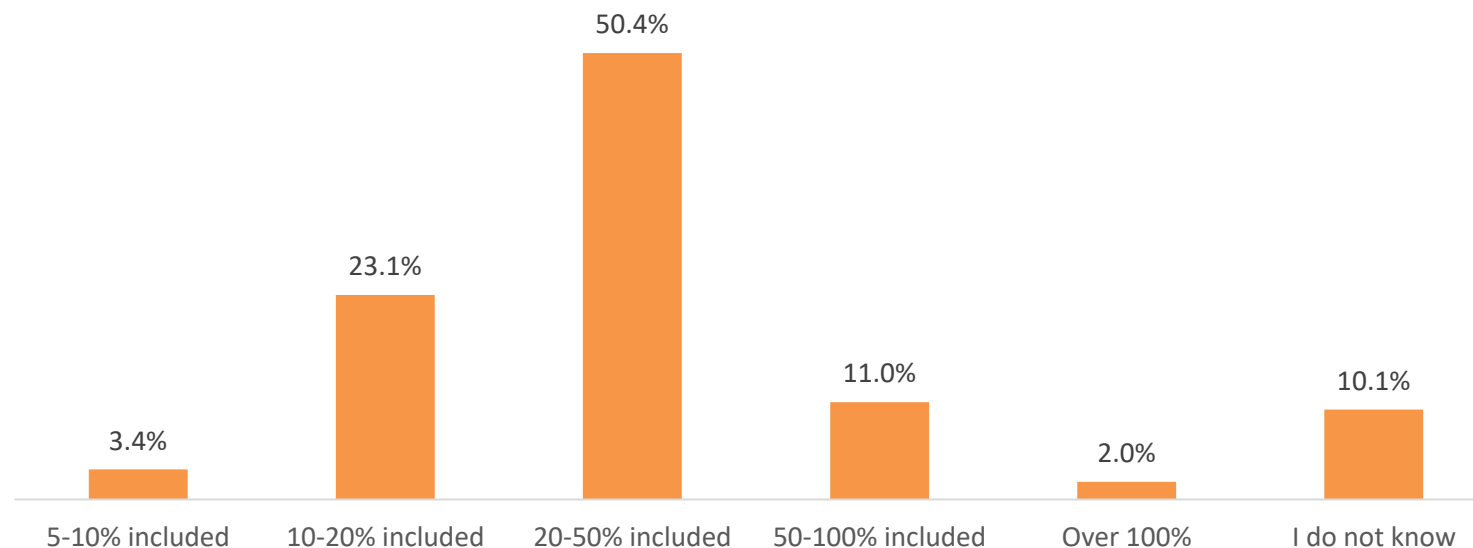
- 30 - 99 ha (N=133)
- 100 - 299 ha (N=222)
- 300 - 799 ha (N=144)
- 800 - 1999 ha (N=79)
- >2000 ha (N=27)



REDUCING PESTICIDES AND FERTILIZERS

COST INCREASING OPTIONS, RELATED TO NO OF FARMS (COST INCREASE)

How much do you estimate that the total operating costs of the farm will increase? (applicable for the vegetable farms only) (N=355)

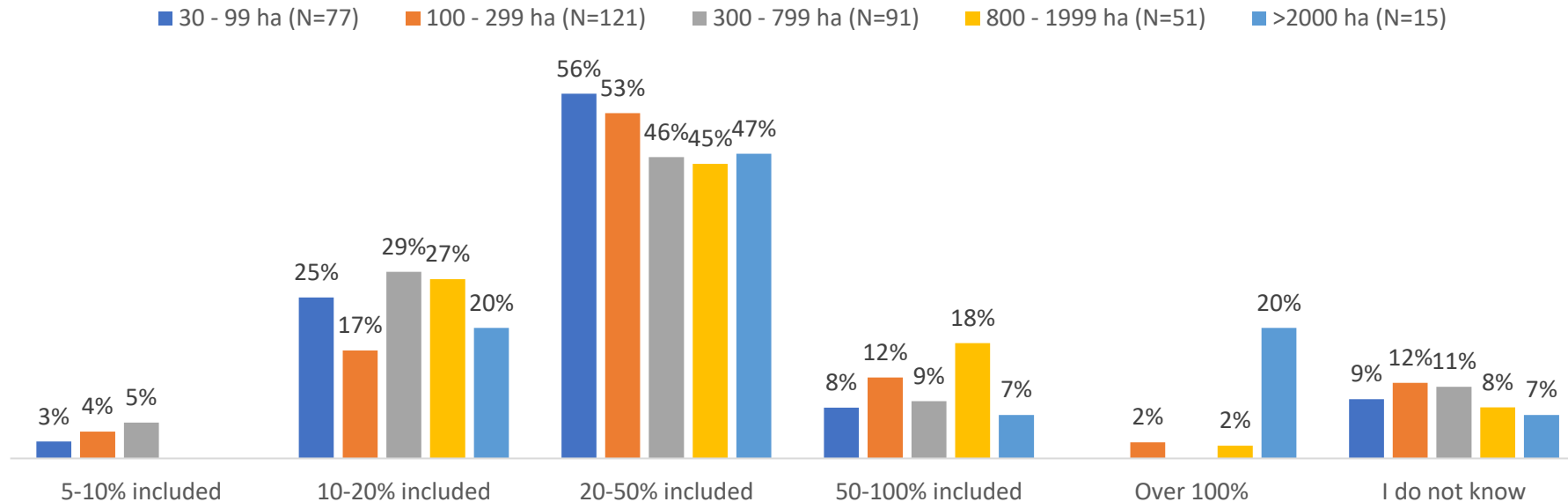


- Half of the farmers that think that costs will increase in case of reducing the pesticides and fertilizers in the farm estimate that the increase will be approx 20-50%.

REDUCING PESTICIDES AND FERTILIZERS

COST INCREASING OPTIONS, RELATED TO FARM SIZE (COST INCREASE)

How much do you estimate that the total operating costs of the farm will increase? (applicable for the vegetable farms only)

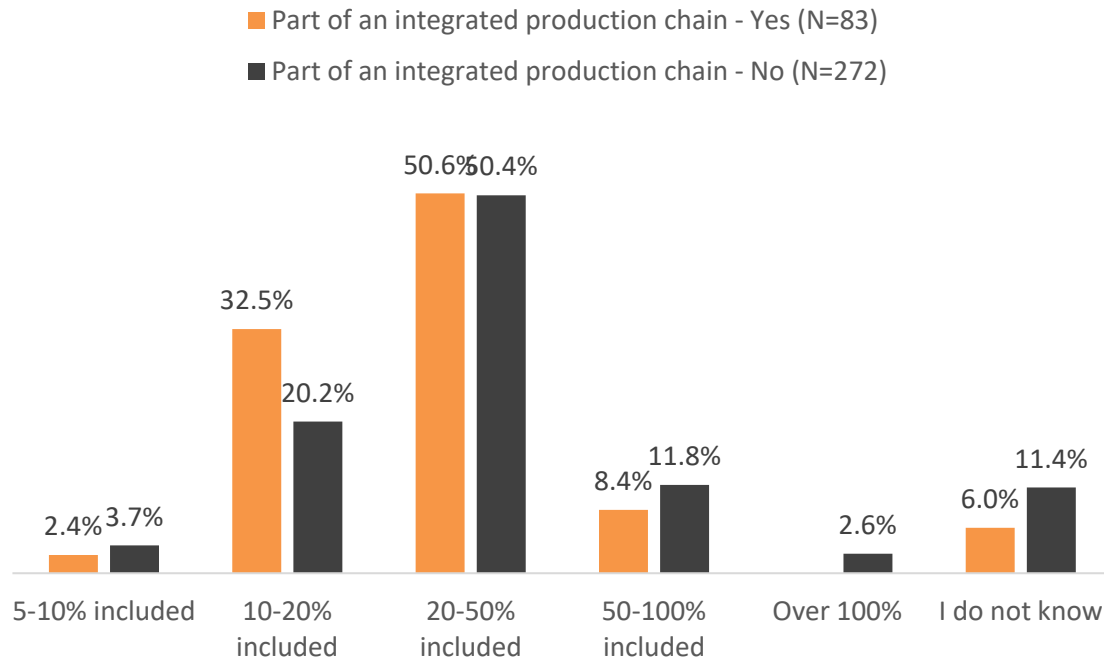


- Bigger farms tend to believe that the increase in operating costs will be between 10-20%, while smaller farms tend to believe that the increase will be somewhere between 20-50%.

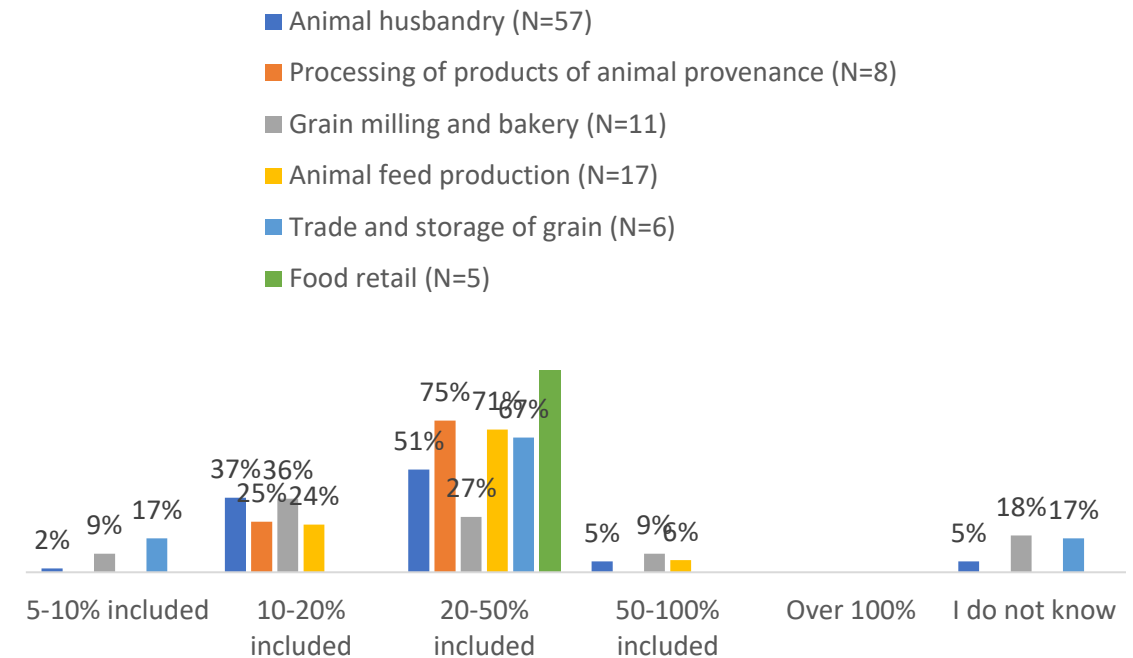
REDUCING PESTICIDES AND FERTILIZERS

COST INCREASING OPTIONS, RELATED TO INTEGRATED CHAIN MEMBERSHIP (COST INCREASE)

How much do you estimate that the total operating costs of the farm will increase? (applicable for the vegetable farms only)



How much do you estimate that the total operating costs of the farm will increase? (applicable for the vegetable farms only)

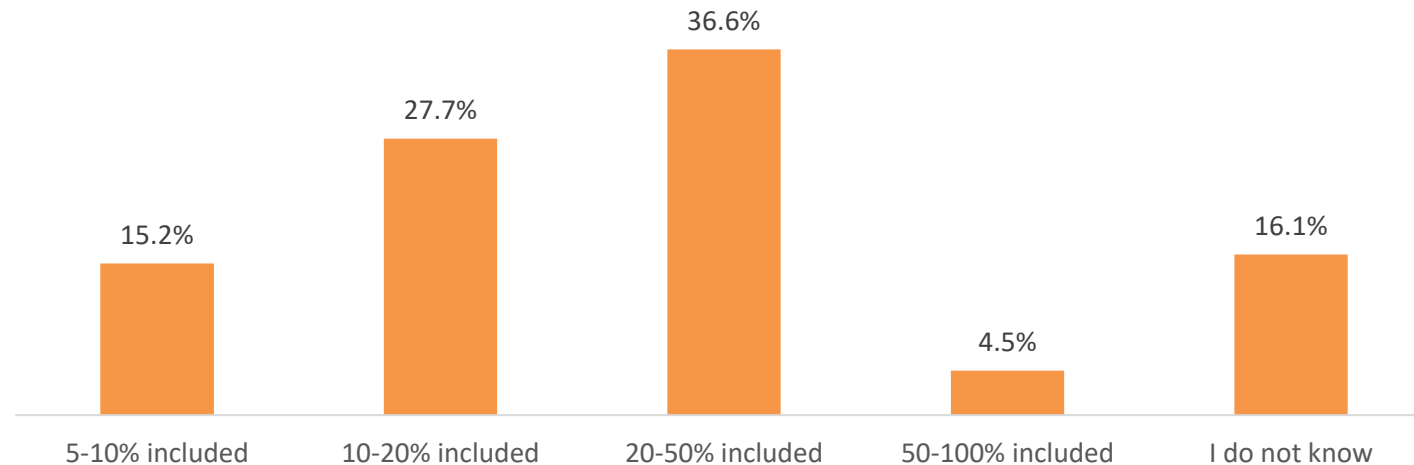


- There is a less expected increase in costs for grain milling and bakery integrated farms, while the food retail integrated farms estimate that the increase will be bigger (20-50%)

REDUCING PESTICIDES AND FERTILIZERS

COST DECREASING OPTIONS, RELATED TO NO OF FARMS (COST DECREASE)

How much do you estimate that the total operating costs of the farm will decrease? (applicable for the vegetable farms only) (N=112)

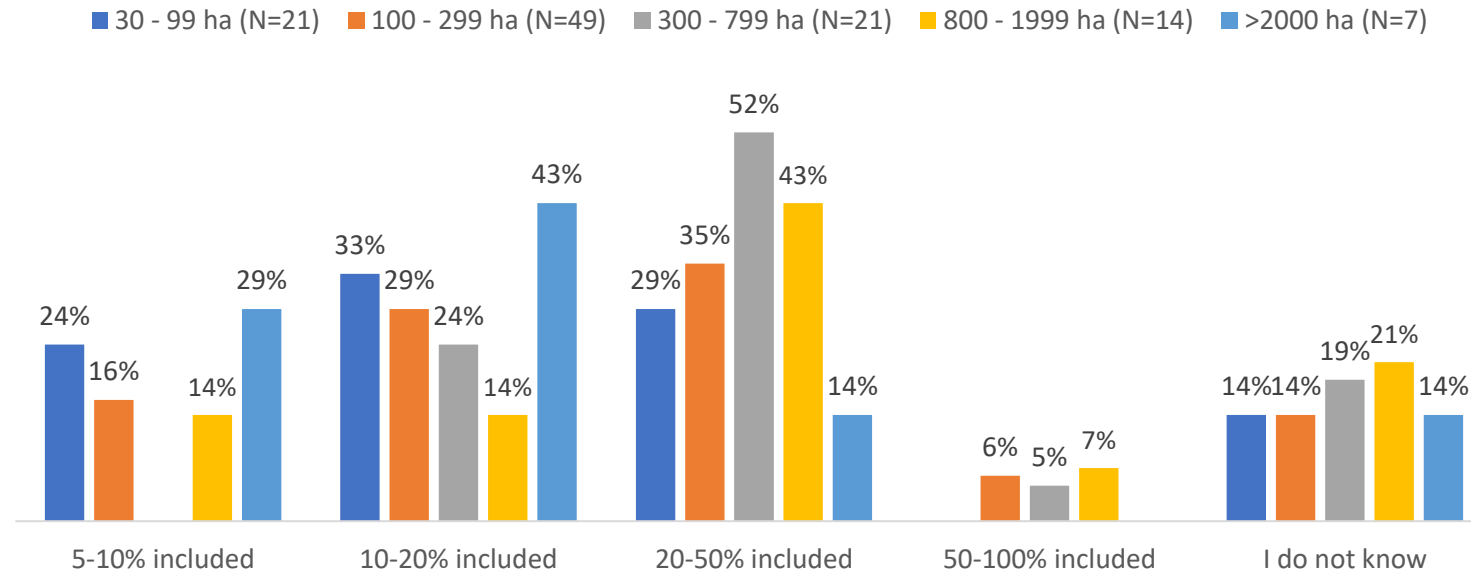


- 36% of the farms think that operational costs will decrease alongside reducing pesticides and fertilizers.

REDUCING PESTICIDES AND FERTILIZERS

COST DECREASING OPTIONS, RELATED TO FARM SIZE(COST DECREASE)

How much do you estimate that the total operating costs of the farm will decrease? (applicable for the vegetable farms only)

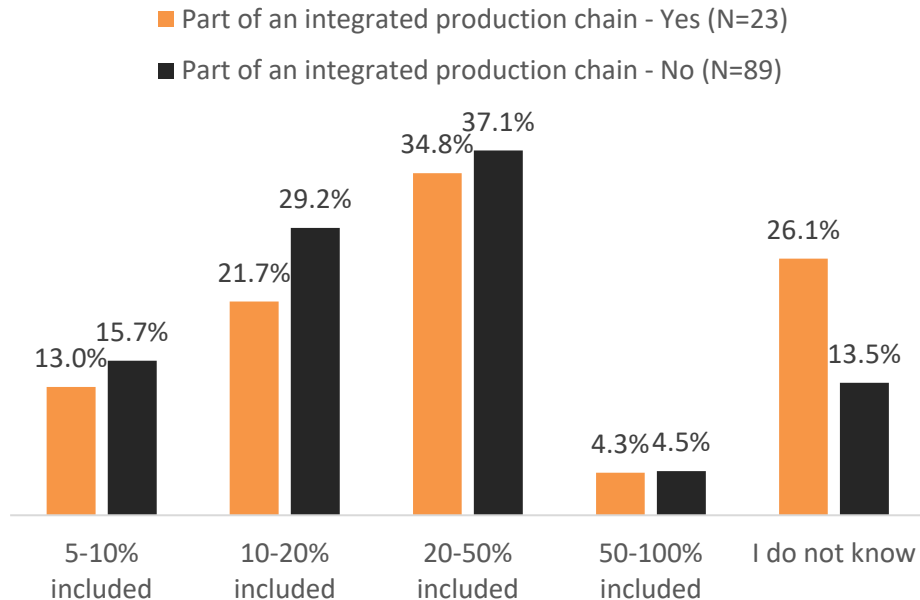


- Middle sized farms tend to believe that operational costs will be more reduced, compared to the very small or the very big farms, that think that the operational costs will be less reduced.

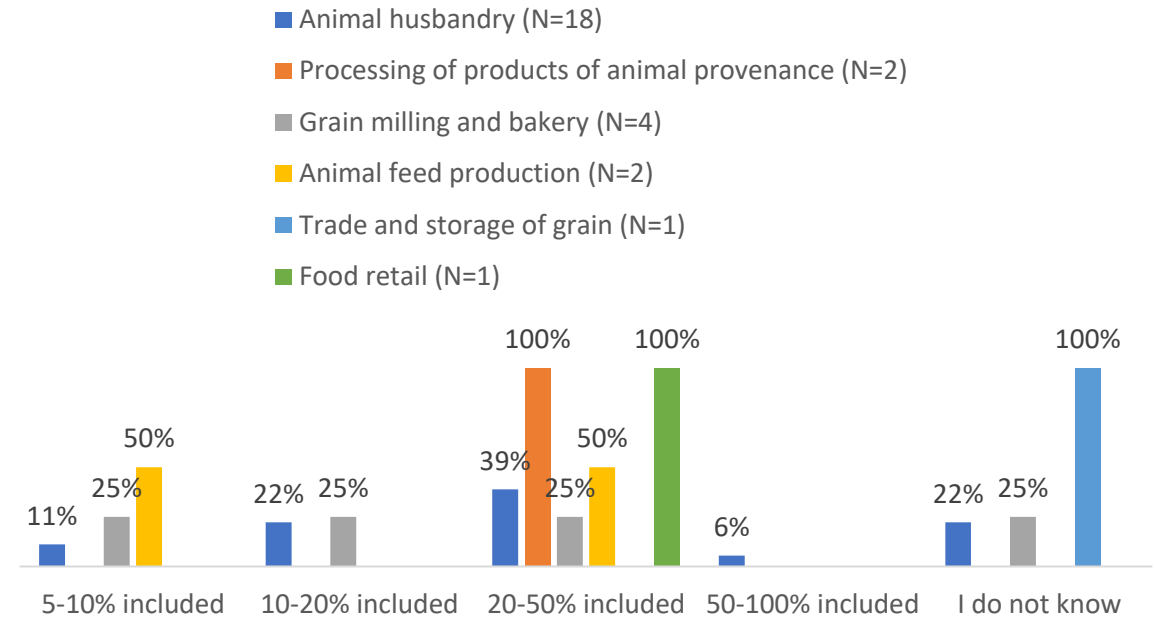
REDUCING PESTICIDES AND FERTILIZERS

COST DECREASING OPTIONS, RELATED TO INTEGRATED CHAIN MEMBERSHIP (COST DECREASE)

How much do you estimate that the total operating costs of the farm will decrease? (applicable for the vegetable farms only)



How much do you estimate that the total operating costs of the farm will decrease? (applicable for the vegetable farms only)



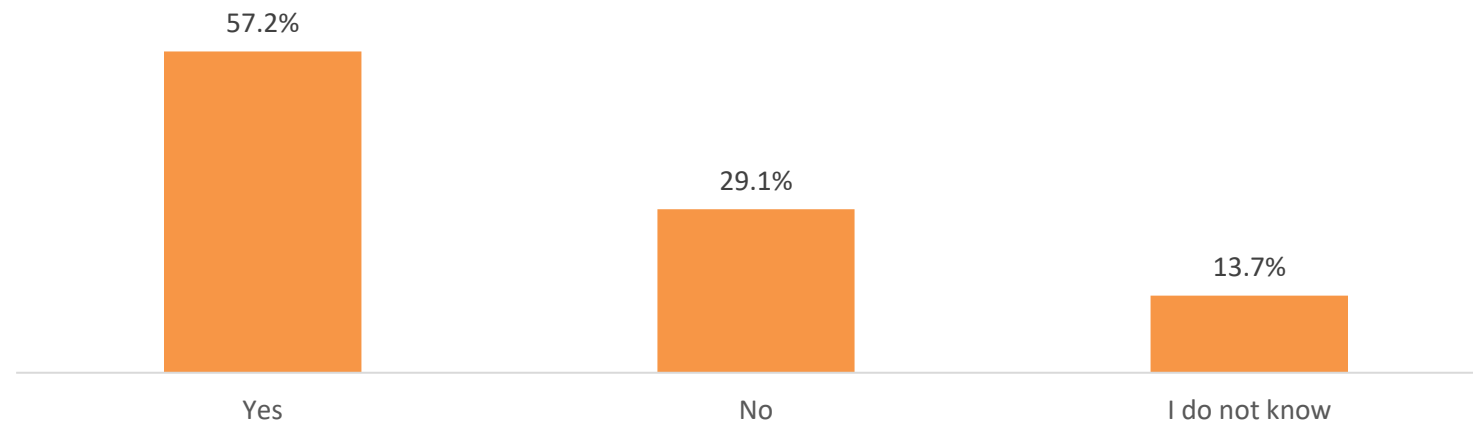
- The farms that are part of an integrated produced chain tend to believe less that the costs will decrease, compared to the farms that are not part of an integrated producer chain.

INCREASING ECOLOGICAL CROP AREA

INCREASING ECOLOGICAL CROP SIZE, RELATED TO NO OF FARMS

Do you believe that the CAP provision regarding the up to 25% increase of all ecologically cultivated crops until 2030 could be successfully implemented in your farm?

(N=605)

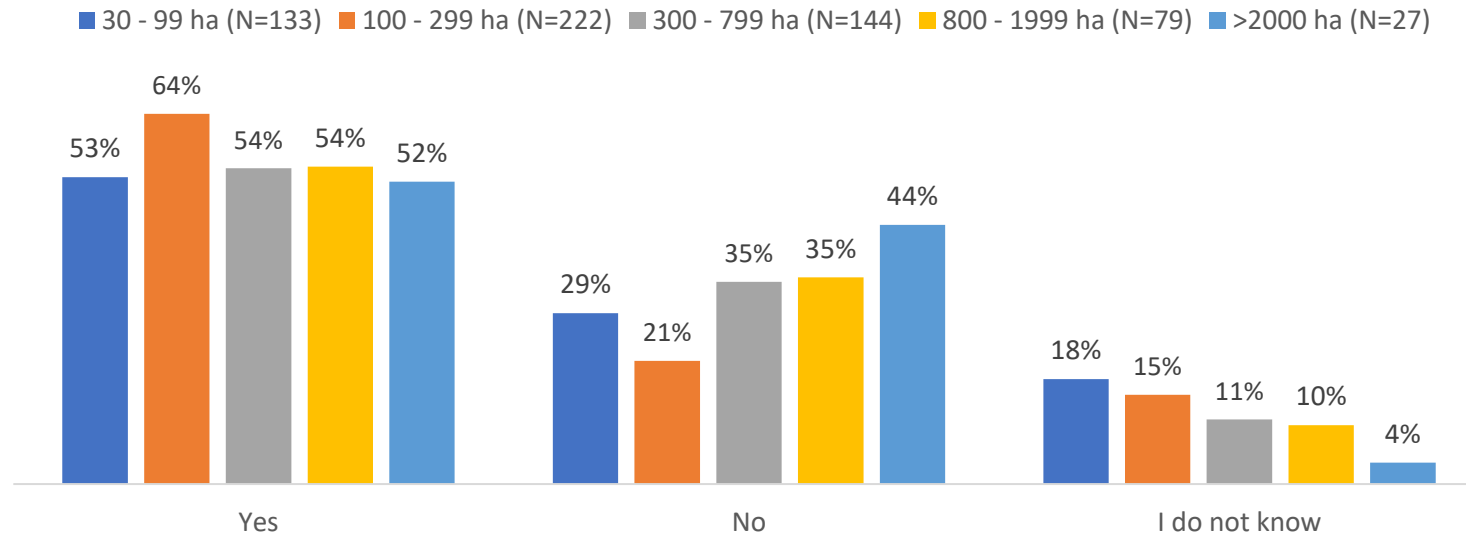


- Almost 60% of the total farmers think that the increase by 25% of all ecologically cultivated crops can be done until 2030, **a pattern that can be described as optimistic.**

INCREASING ECOLOGICAL CROP AREA

INCREASING ECOLOGICAL CROP SIZE, RELATED TO CROP SIZE

Do you believe that the CAP provision regarding the up to 25% increase of all ecologically cultivated crops until 2030 could be successfully implemented in your farm?

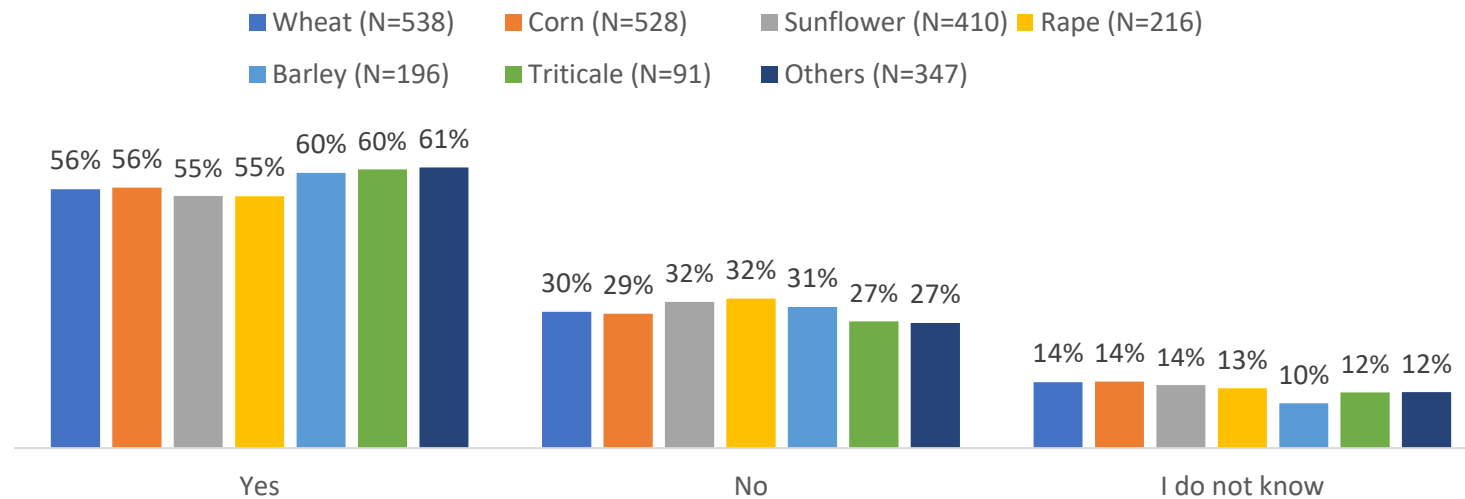


- Again, **bigger farms tend to be more pessimistic.**

INCREASING ECOLOGICAL CROP AREA

INCREASING ECOLOGICAL CROP SIZE, RELATED TO CROP TYPE

Do you believe that the CAP provision regarding the up to 25% increase of all ecologically cultivated crops until 2030 could be successfully implemented in your farm?

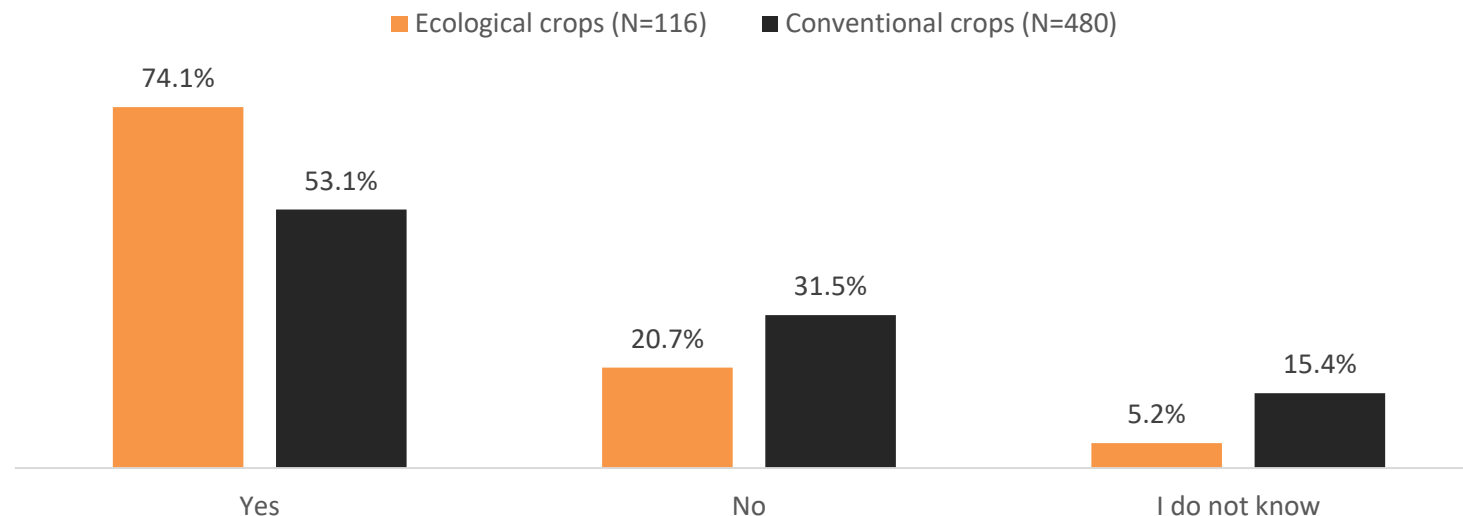


- Farmers tend to believe that barley, triticale and other type of crops (vegetable, meadows) are more suitable for an increase by 25% of ecological cultivated crop size.

INCREASING ECOLOGICAL CROP AREA

INCREASING ECOLOGICAL CROP SIZE, RELATED TO INTEGRATED CHAIN MEMBERSHIP

Do you believe that the CAP provision regarding the up to 25% increase of all ecologically cultivated crops until 2030 could be successfully implemented in your farm?

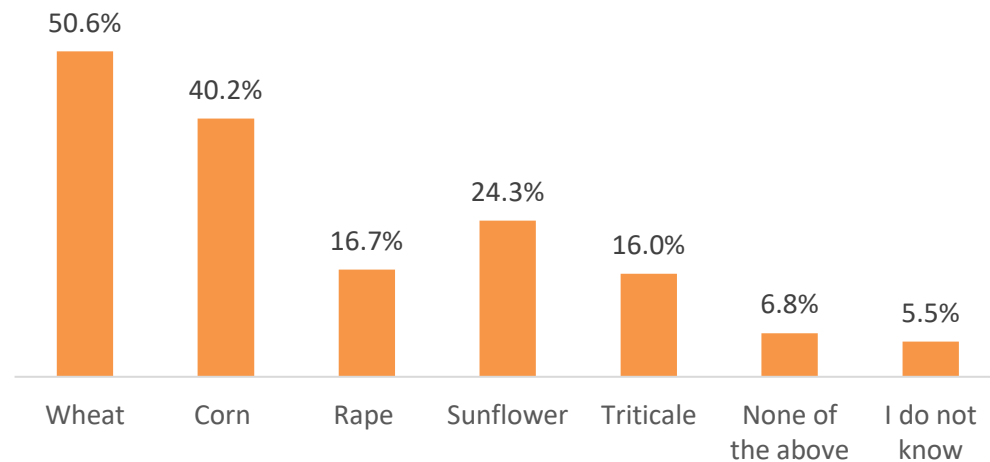


- Regarding the successful implementation of the 25% increase in ecologically cultivated crops, **the farmers that already grow ecological crops in their farms are more confident**, compared to the ones that grow conventional crops.

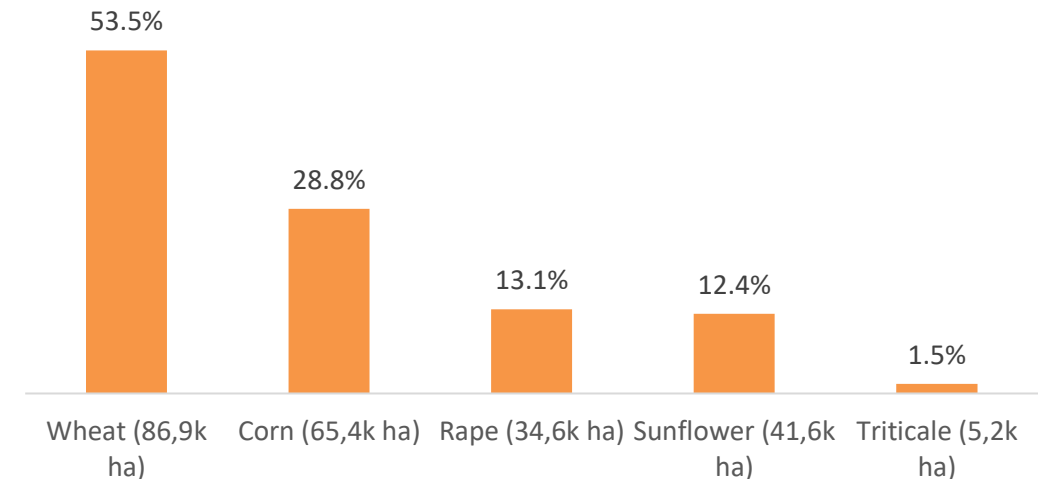
INCREASING ECOLOGICAL CROP AREA

CROPS PREFERRED FOR ECO TURN, RELATED TO NO OF FARMS AND CROP SIZE

Which of the cultivated crops do you believe will fit best for being transitioned to ecological cultivation?
(N=605)



Which of the cultivated crops do you believe will fit best for being transitioned to ecological cultivation?
(area for each crop / total area for each crop)



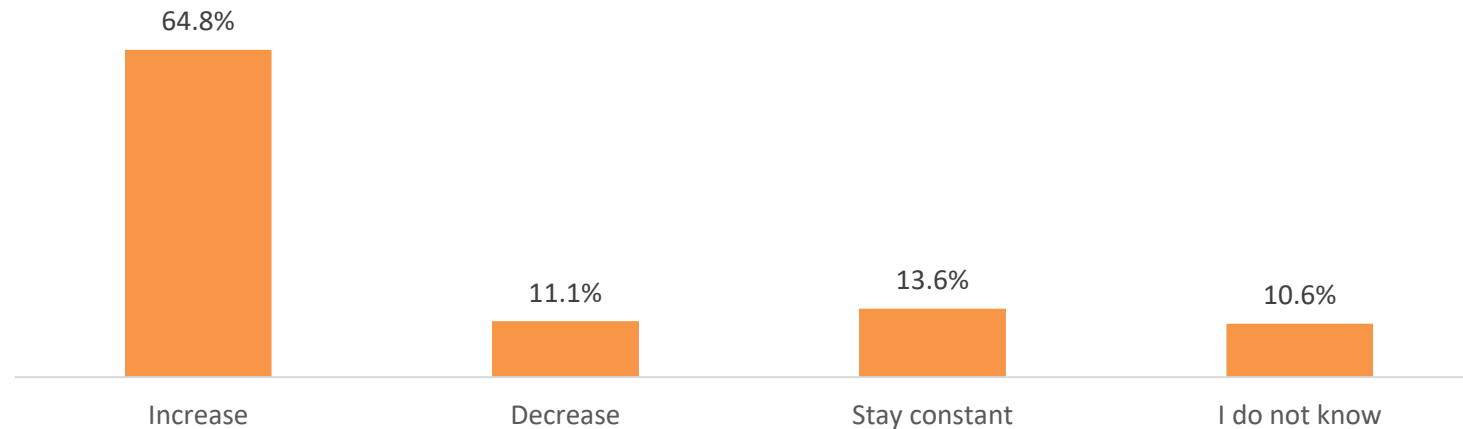
- 50% of the farmers think that wheat will fit best for transitioning to ecological exploitation.
- Smaller farms think that corn and triticale will be suitable.

INCREASING ECOLOGICAL CROP AREA

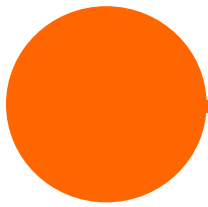
MAINTAINING PRODUCTIVITY, RELATED TO NO OF FARMS

If you needed to increase up to 25% all the ecologically cultivated crops in your farm, in order to maintain the same productivity that you have at the moment, you think your operating cost of the farm will:

(N=605)



- 65% of the farmers think that costs will increase when turning to an increase by 25% of the ecological crop size of the farm.

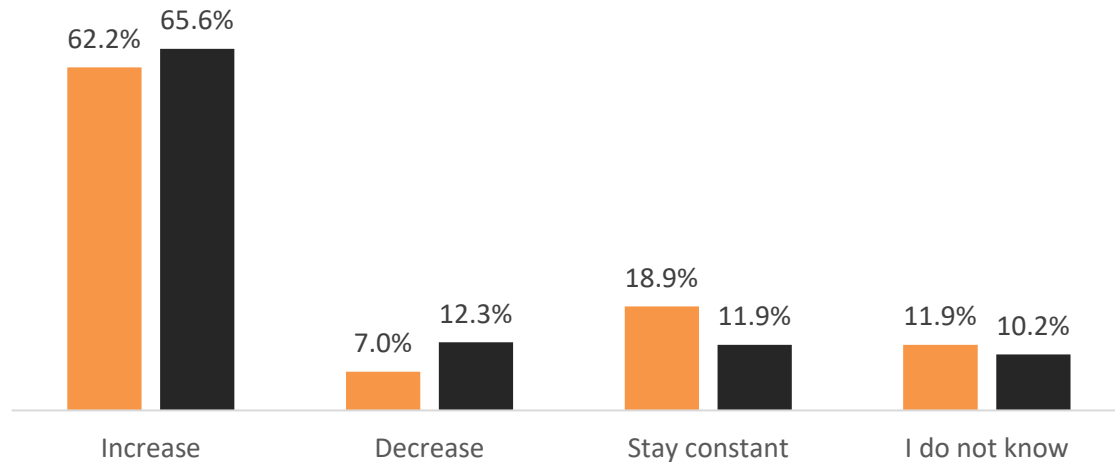


INCREASING ECOLOGICAL CROP AREA

MAINTAINING PRODUCTIVITY, RELATED TO CROP SIZE AND INTEGRATED PRODUCTION CHAIN

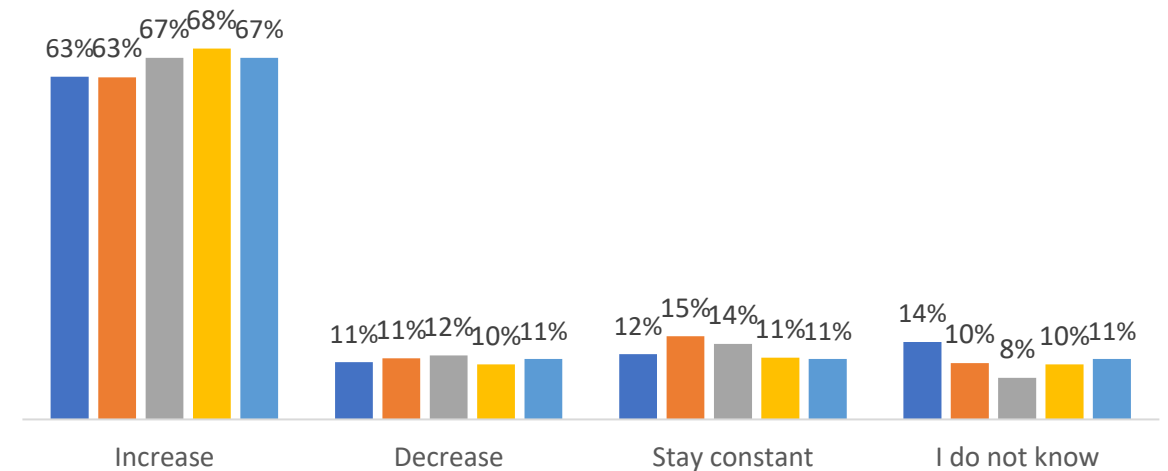
If you needed to increase up to 25% all the ecologically cultivated crops in your farm, in order to maintain the same productivity that you have at the moment, you think your operating cost of the farm will:

- Part of an integrated production chain - Yes (N=143)
- Part of an integrated production chain - No (N=462)



If you needed to increase up to 25% all the ecologically cultivated crops in your farm, in order to maintain the same productivity that you have at the moment, you think your operating cost of the farm will:

- 30 - 99 ha (N=133)
- 100 - 299 ha (N=222)
- 300 - 799 ha (N=144)
- 800 - 1999 ha (N=79)
- >2000 ha (N=27)

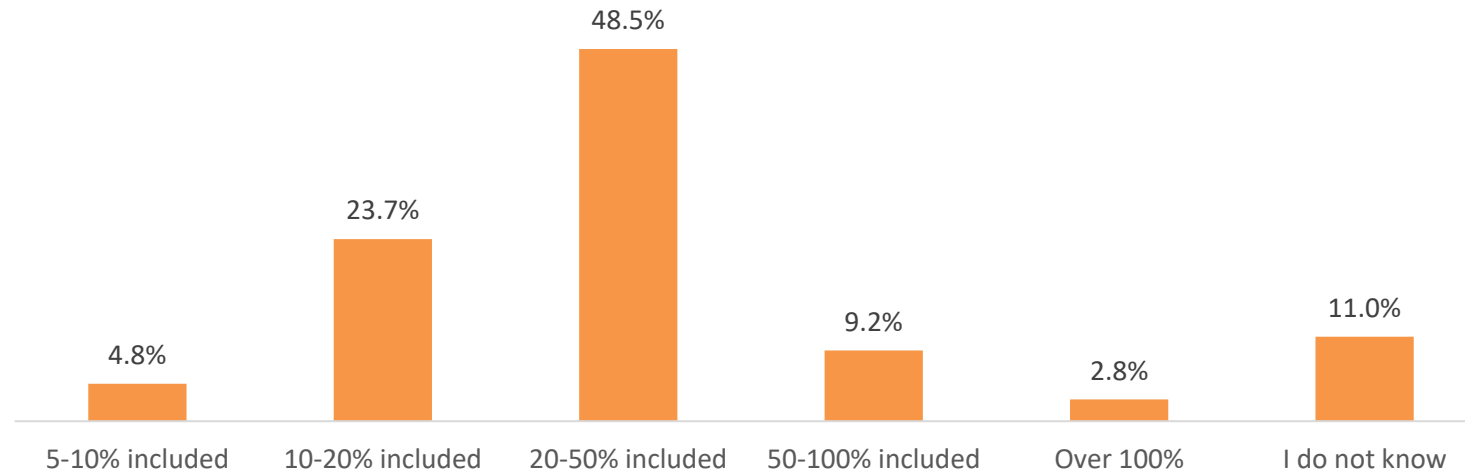


INCREASING ECOLOGICAL CROP AREA

INCREASING OPERATIONAL COSTS, RELATED TO NO OF FARMS (COST INCREASE)

How much do you estimate that the total operating costs of your farm will increase if you had to increase the ecological cultivated area with up to 25%?

(N=392)

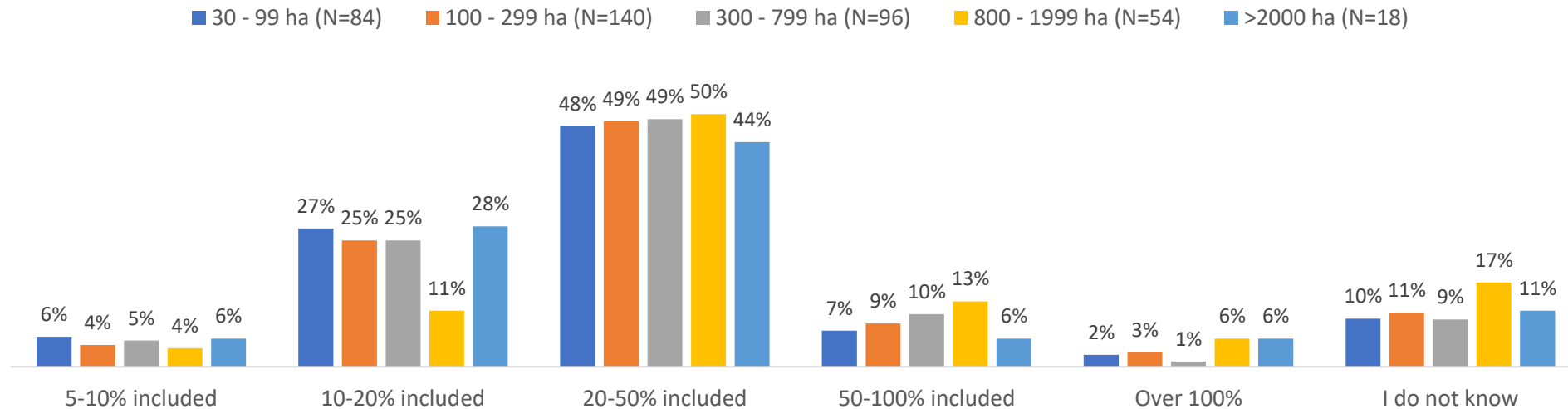


- Almost 50% of the total number of farms think that costs will increase by 20-50%.

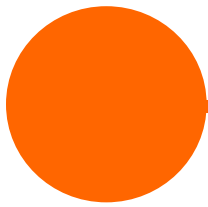
INCREASING ECOLOGICAL CROP AREA

INCREASING OPERATIONAL COSTS, RELATED TO FARM SIZE (COST INCREASE)

How much do you estimate that the total operating costs of your farm will increase if you had to increase the ecological cultivated area with up to 25%?



- Middle sized farms tend to believe that operational costs will be more increased, compared to the very small or the very big farms, that think that the operational costs will be less increased.

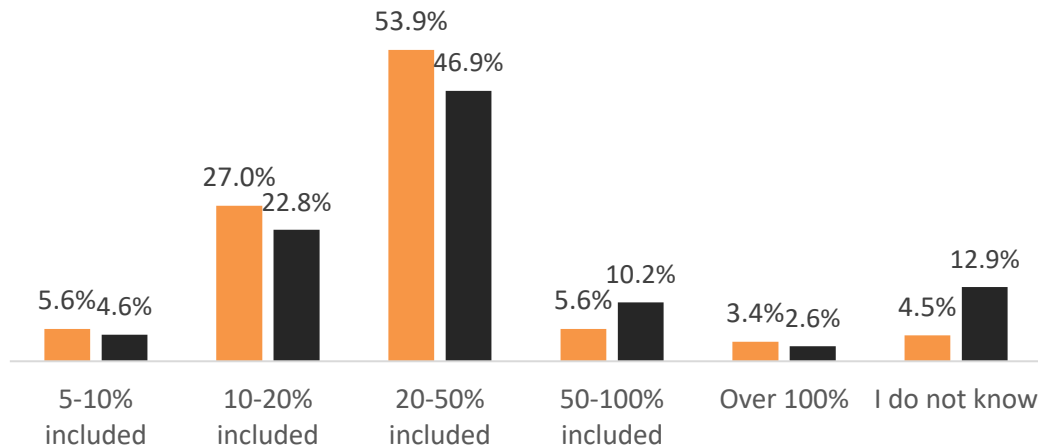


INCREASING ECOLOGICAL CROP AREA

INCREASING OPERATIONAL COSTS, RELATED TO INTEGRATED CHAIN (COST INCREASE)

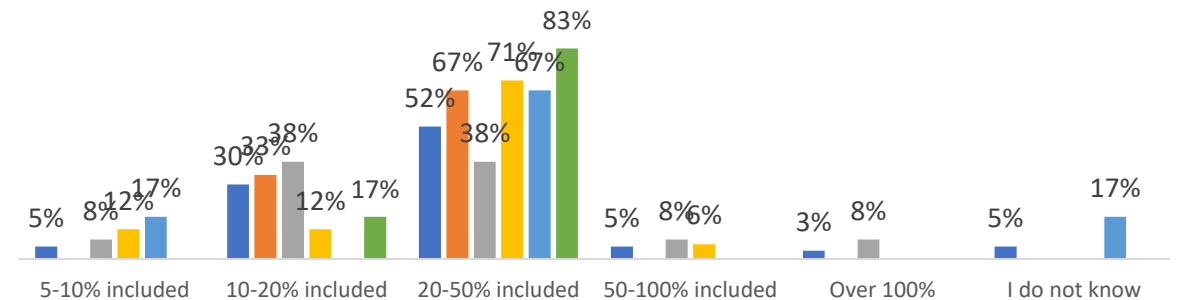
How much do you estimate that the total operating costs of your farm will increase if you had to increase the ecological cultivated area with up to 25%?

■ Part of an integrated production chain - Yes (N=89)
■ Part of an integrated production chain - No (N=303)



How much do you estimate that the total operating costs of your farm will increase if you had to increase the ecological cultivated area with up to 25%?

■ Animal husbandry (N=61)
 ■ Processing of products of animal provenance (N=9)
 ■ Grain milling and bakery (N=13)
 ■ Animal feed production (N=17)
 ■ Trade and storage of grain (N=6)
 ■ Food retail (N=6)



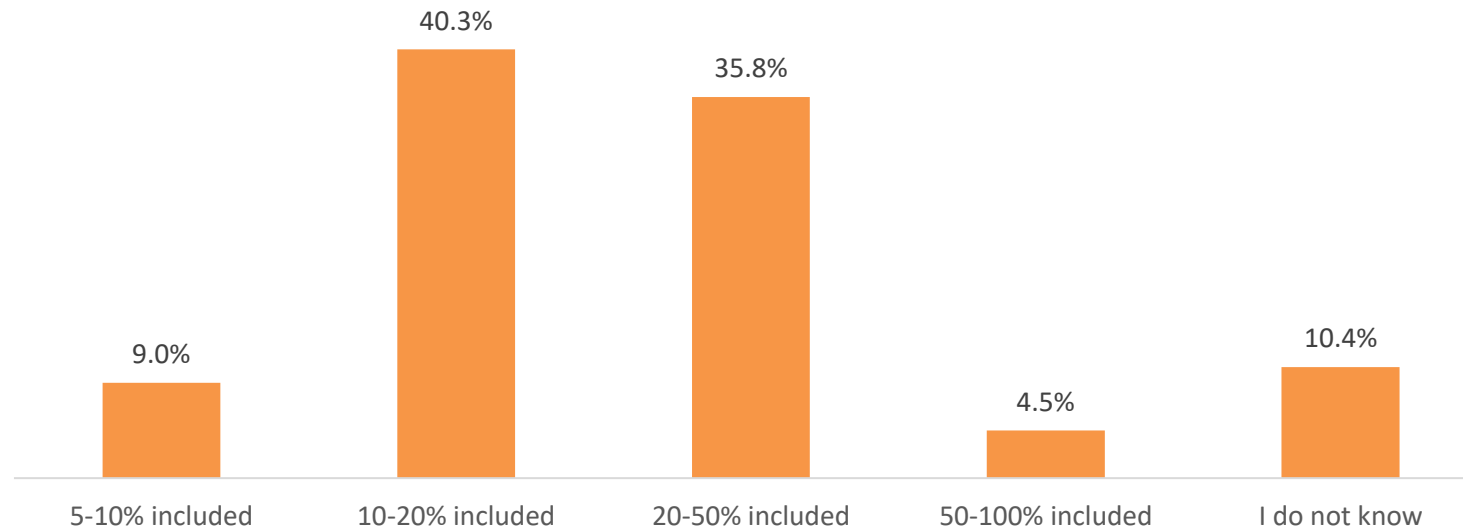
- The farms that are part of an integrated produced chain tend to believe more that the costs will increase, compared to the farms that are not part of an integrated producer chain.

INCREASING ECOLOGICAL CROP AREA

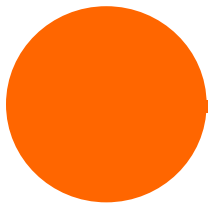
DECREASING OPERATIONAL COSTS, RELATED TO NO OF FARMS (COST DECREASE)

How much do you estimate that the total operating costs of your farm will decrease if you had to increase the ecological cultivated area with up to 25%?

(N=67)



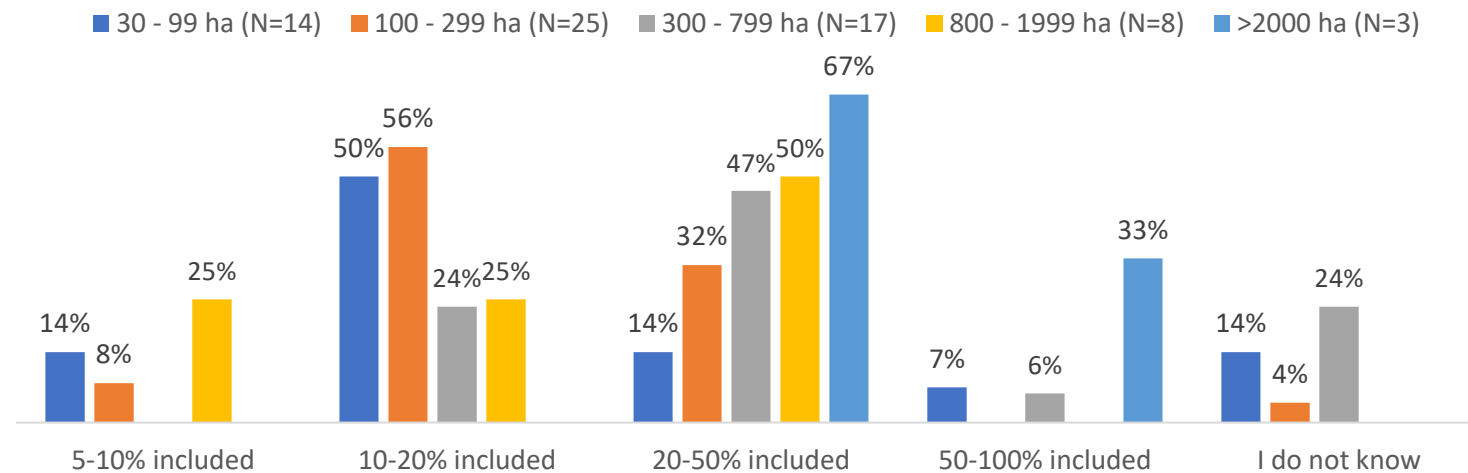
- Approx 40% of the farmers expect the cost to decrease by 10-25%.



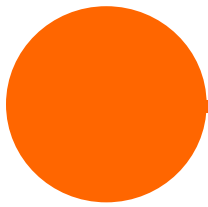
INCREASING ECOLOGICAL CROP AREA

DECREASING OPERATIONAL COSTS, RELATED TO FARM SIZE (COST DECREASE)

How much do you estimate that the total operating costs of your farm will decrease if you had to increase the ecological cultivated area with up to 25%?



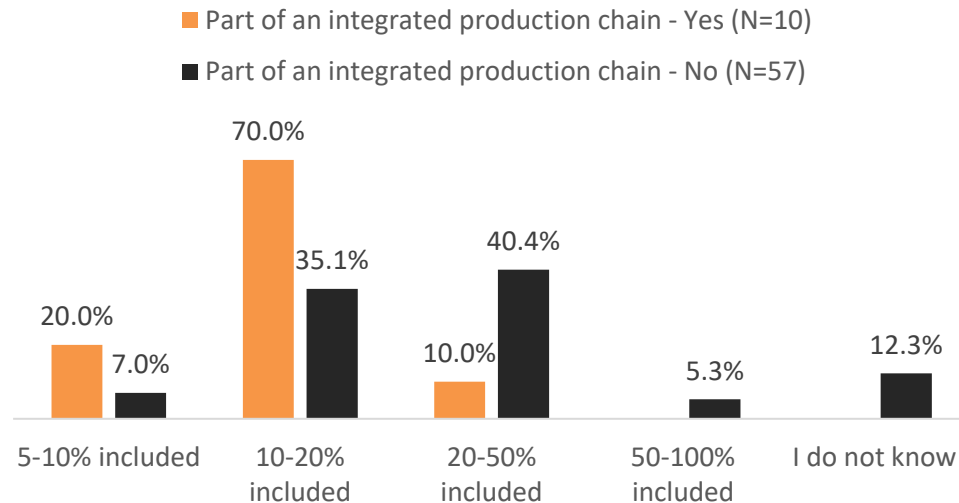
- While the total farm area increases, it increases the option for decreasing the operation costs to 20-50%.



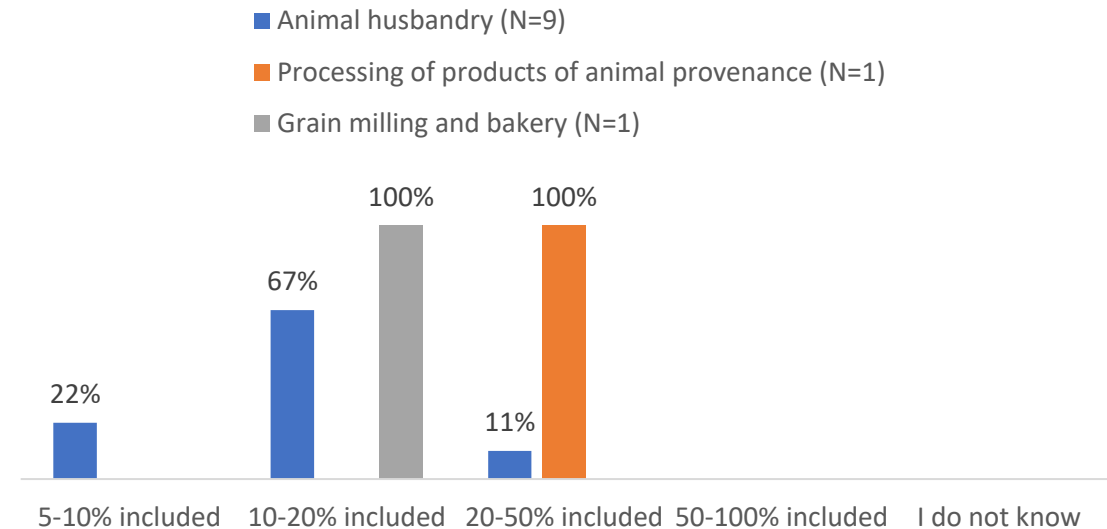
INCREASING ECOLOGICAL CROP AREA

DECREASING OPERATIONAL COSTS, RELATED TO INTEGRATED CHAIN (COST DECREASE)

How much do you estimate that the total operating costs of your farm will decrease if you had to increase the ecological cultivated area with up to 25%?



How much do you estimate that the total operating costs of your farm will decrease if you had to increase the ecological cultivated area with up to 25%?

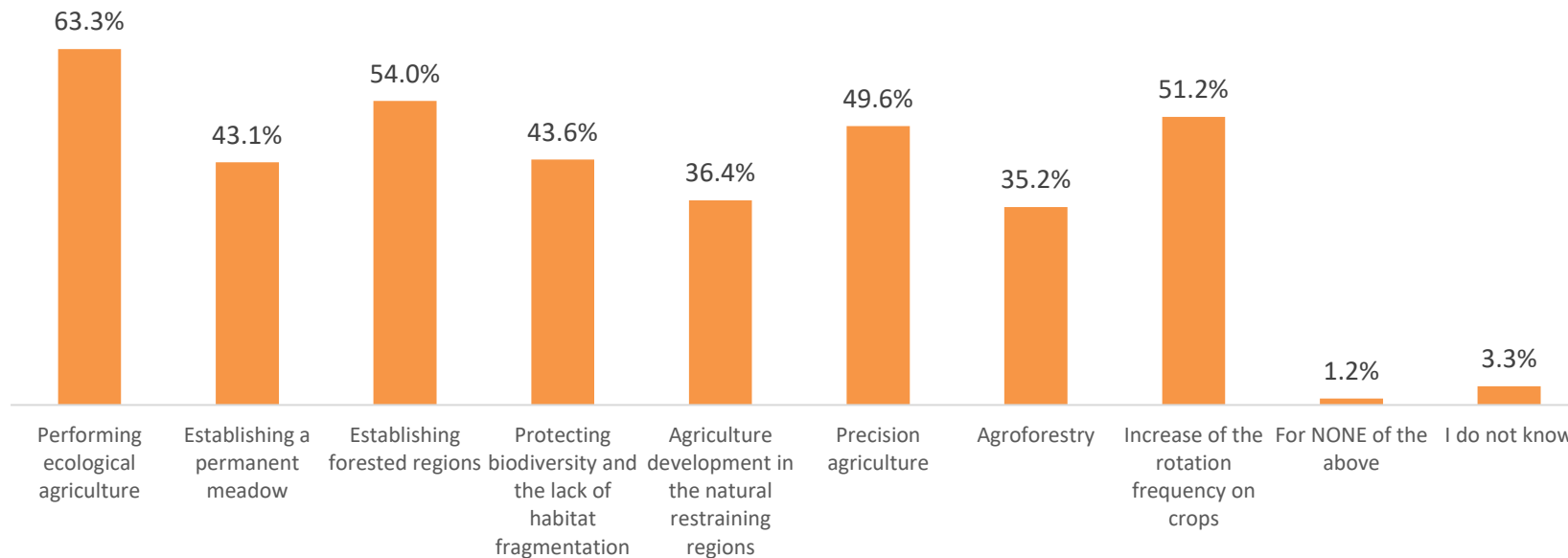


- The farms that are part of an integrated producer chain tend to believe more that the costs will decrease, compared to the farms that are not part of an integrated producer chain.

OPTIONS FOR AG SUBSIDIES

PRACTICES FARMERS SHOULD RECEIVE SUBSIDIES FOR, RELATED TO NO OF FARMS

For which of the following climate and environment protection practices do you think that farmers should be given agricultural subsidies?
(N=605)

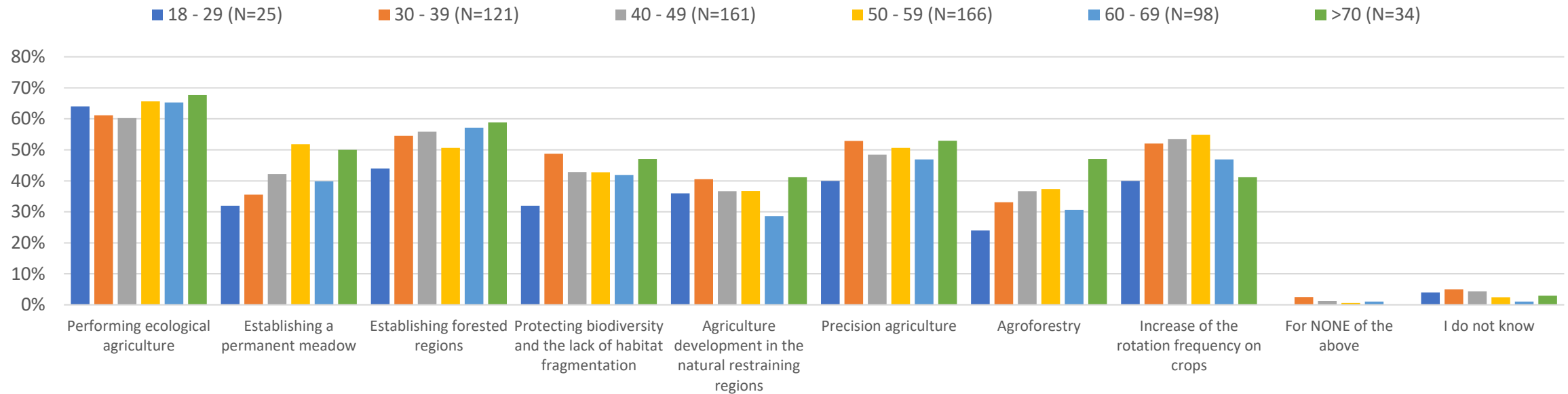


- The favourite practices for which farmers want to receive subsidies are performing ecological agriculture, establishing forested regions, crop rotation increase and integrating precision agriculture.

OPTIONS FOR AG SUBSIDIES

PRACTICES FARMERS SHOULD RECEIVE SUBSIDIES FOR, RELATED TO FARMER AGE

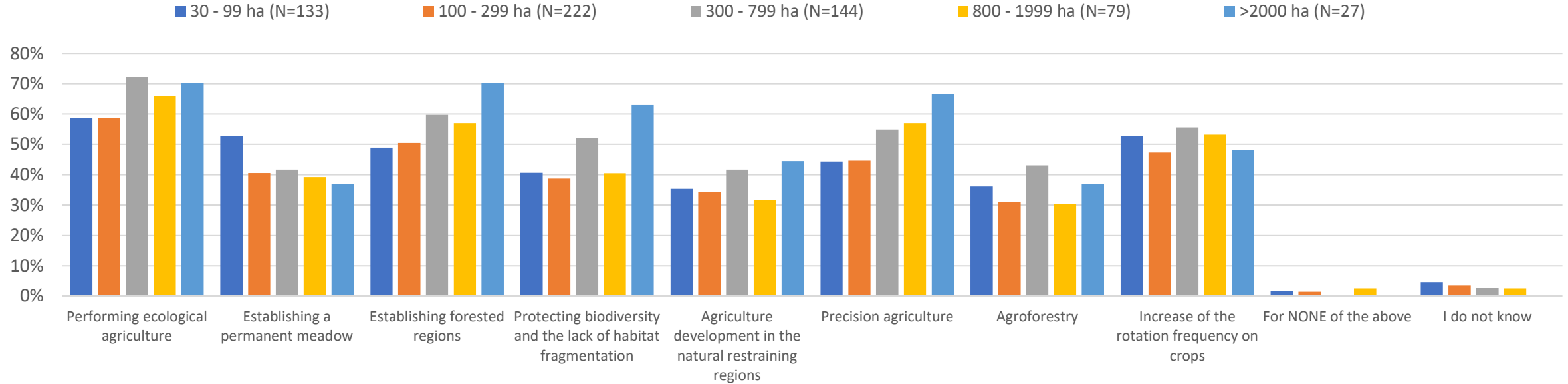
For which of the following climate and environment protection practices do you think that farmers should be given agricultural subsidies?



OPTIONS FOR AG SUBSIDIES

PRACTICES FARMERS SHOULD RECEIVE SUBSIDIES FOR, RELATED TO FARM SIZE

For which of the following climate and environment protection practices do you think that farmers should be given agricultural subsidies?

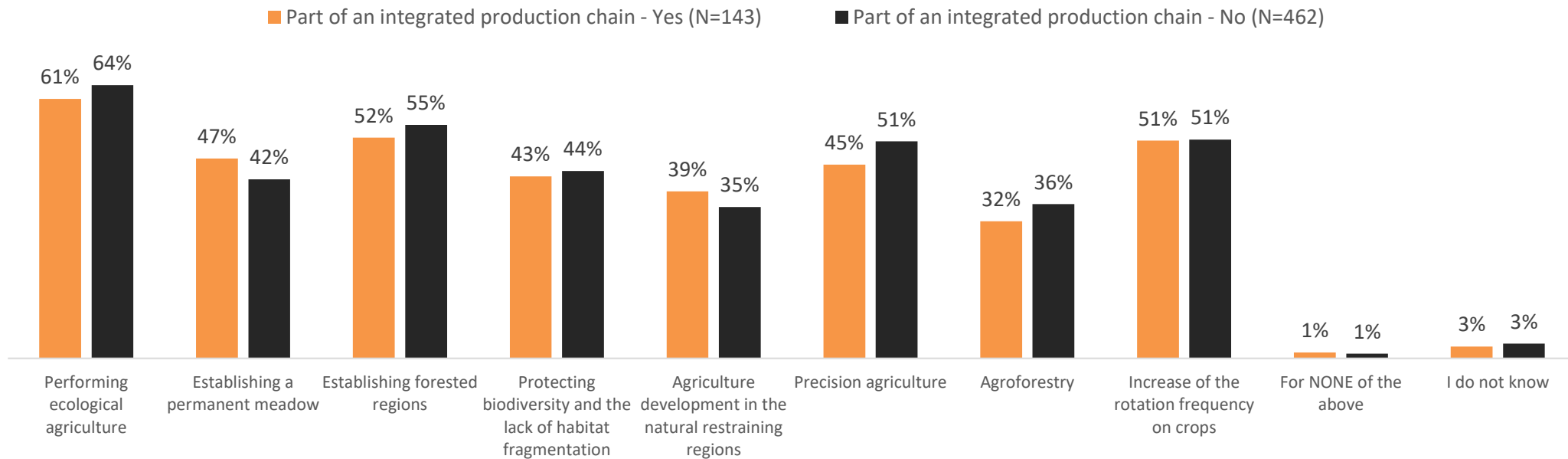


- Larger farms are more in favour of environment friendly measures, such as establishing forested areas or protecting biodiversity.
- Smaller farms opt more for crop rotation.

OPTIONS FOR AG SUBSIDIES

PRACTICES FARMERS SHOULD RECEIVE SUBSIDIES FOR, RELATED TO INTEGRATED PRODUCER CHAIN

For which of the following climate and environment protection practices do you think that farmers should be given agricultural subsidies?





NEW COMMON AGRICULTURAL POLICY IMPLEMENTATION IN ROMANIA. POSSIBLE IMPACTS AND TRENDS

GENERAL PERSPECTIVES AND OPTION VALUATION