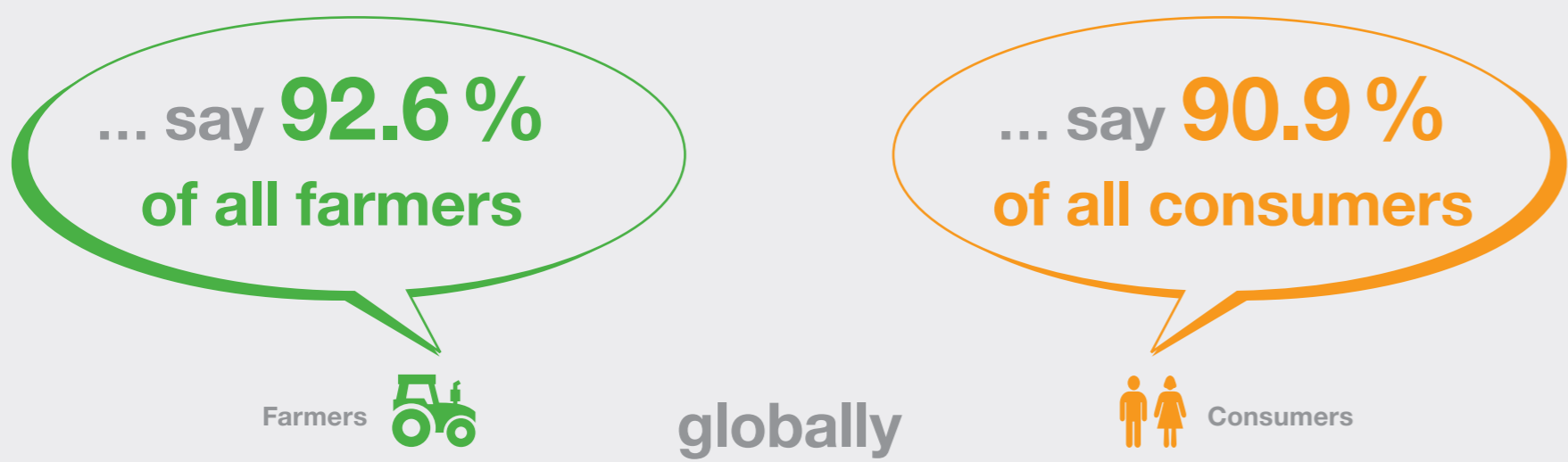


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Farm Perspectives Study, 2014 – Main findings

'Farmers fulfill a necessary function in society'



Question: To what extent do you agree or disagree with the following statement 'farmers fulfill a necessary function in society'?
% = amount of farmers and consumers that answered with 'totally agree' and 'agree'

Farmers care for the land they farm

Farmers and consumers see farmers in first place as 'Providers of food', but farmers see themselves strongly as 'Stewards of the land'



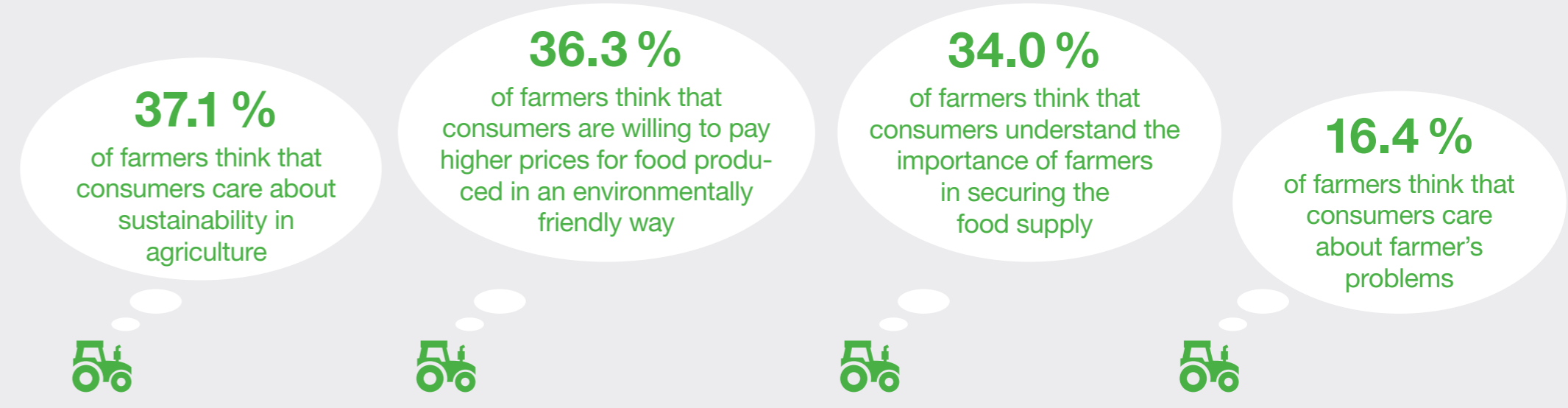
Question: To what extent do you agree or disagree with the following statement 'farmers are provider of food' and 'farmers are steward of the land'?
Top of mind answers; farmers and consumers that answered with 'totally agree' and 'agree'

Consumers care about agriculture



Question: To what extent do you agree or disagree with the following statements, which reflect some possible consumer attitudes towards agriculture and farmers?
% = amount of consumers that answered with 'totally agree' and 'agree'

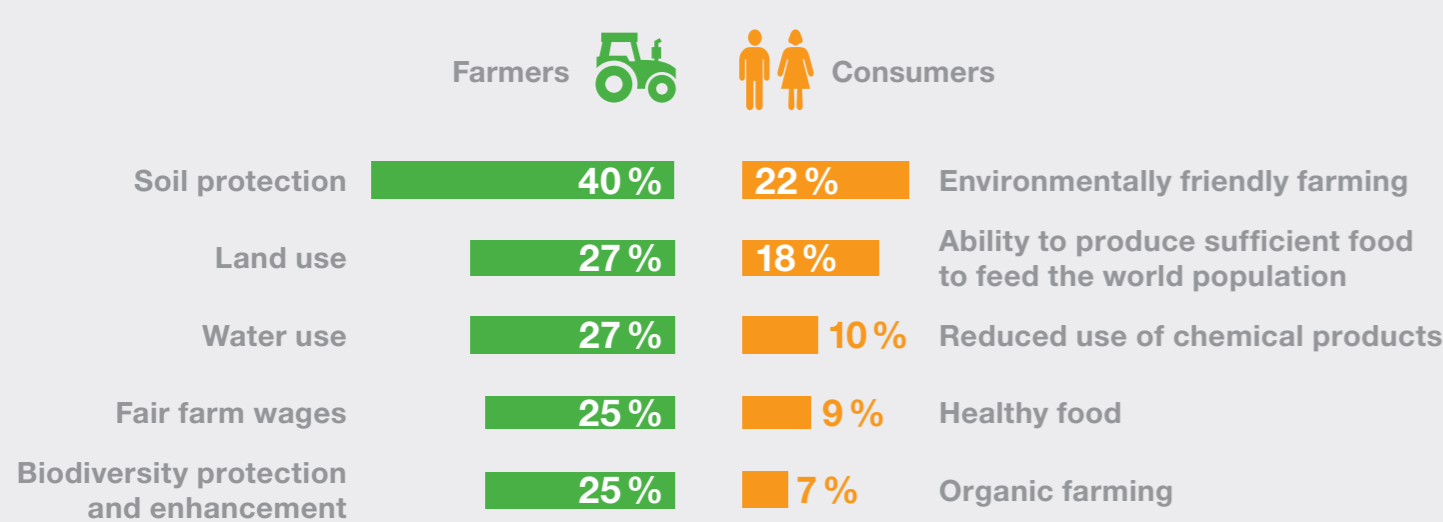
What farmers think about consumers' behavior



Question: To what extent do you agree or disagree with the following statements, which reflect some possible consumer attitudes towards agriculture and farmers?
% = amount of farmers that answered with 'totally agree' and 'agree'

Farmers give a broad meaning to 'sustainability in agriculture'

What sustainability means, global



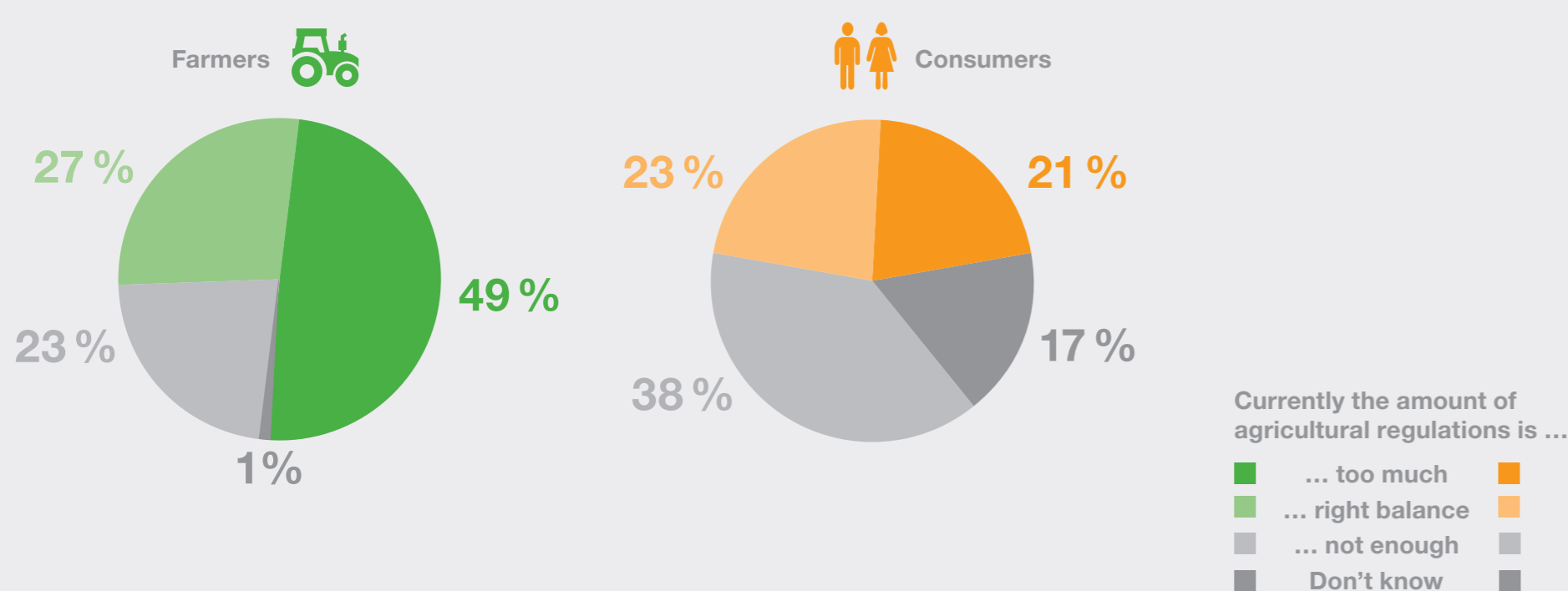
What sustainability means by country

	USA	Brazil	Spain	France	Germany	India	China
Farmers	28% Fair farm wages 18% Land use 15% Soil protection	29% Biodiversity protection & enhancement 8% Environmentally friendly farming 8% Fair farm wages	69% Biodiversity protection & enhancement 62% Fair farm wages 53% Lower resource consumption	22% Soil protection 17% Environmentally friendly farming 15% Biodiversity protection & enhancement	78% Soil protection 32% Less resource consumption 29% Water use	74% Soil protection 69% Land use 64% Water use	66% Soil protection 54% Land use 48% Healthy food
Consumers	25% Ability to produce sufficient food to feed the world population 11% Environmentally friendly farming 9% Soil protection	41% Environmentally friendly farming 21% Ability to produce sufficient food to feed the world population 16% Reduced use of chemical products	22% Ability to produce sufficient food to feed the world population 20% Environmentally friendly farming 10% Produce in a cost efficient way	26% Environmentally friendly farming 12% Reduced use of chemical products 9% Organic farming	14% Environmentally friendly farming 14% Reduced use of chemical products 11% Organic farming	13% Environmentally friendly farming 12% Ability to produce sufficient food to feed the world population 10% Reduced use of chemical products	28% Environmentally friendly farming 28% Ability to produce sufficient food to feed the world population 25% Healthy food

Question: What do you associate spontaneously with 'sustainability' in agriculture? What does it mean to you?
% = amount of aspects mentioned from farmers and consumers; multiple answers were possible

Regulatory situation in the agricultural sector puts pressure on farmers

Global overview

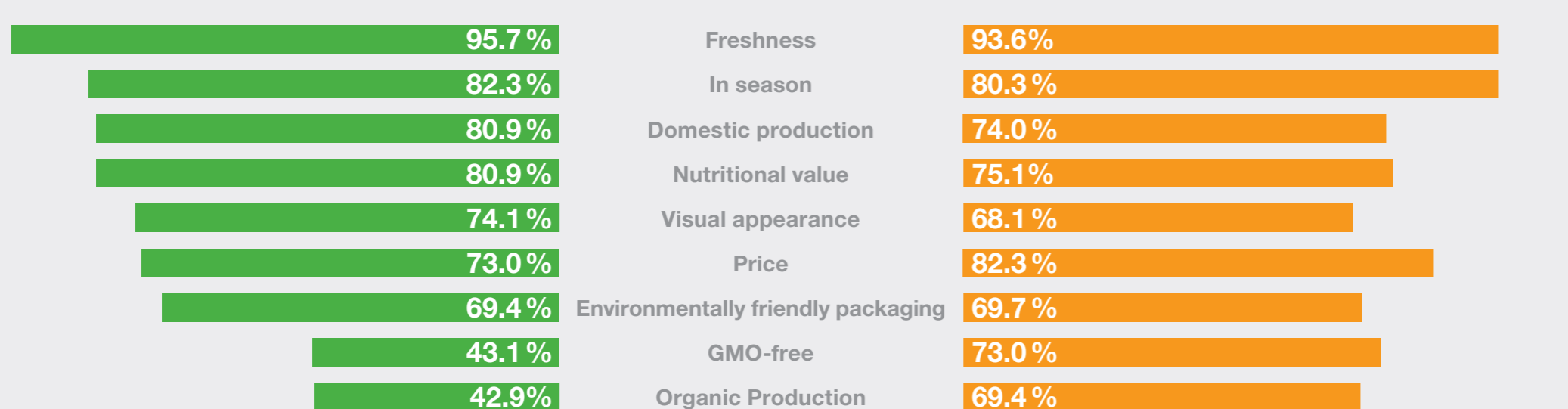


Country overview in %

	Farmers	Consumers
USA	60	19
Brazil	42	19
Spain	77	29
France	83	28
Germany	72	23
India	4	26
China	5	6

Question: Thinking about the regulations currently affecting agricultural production, in your country, which of the following statements best reflects your opinion?
% = amount of farmers and consumers that agreed to the positions given about agricultural regulations

Farmers and consumers share expectations when buying food



Question: When buying food such as vegetables, fruits, cereals/grains ... how important are the following aspects to you?
% = amount of farmers and consumers that answered with 'totally agree' and 'agree'

Farmers' view on future trends in agriculture

	USA	Brazil	Spain	France	Germany	India	China
1	15% Water shortages	30% Improvements in technology	51% Improvements in technology	22% More sustainable agriculture	48% Tougher regulations	68% Water shortages	27% Better prices for farmers
2	14% Small farmers will disappear	9% Climate change	48% Tougher regulations	22% Less reliance on agro-chemicals	37% Small farmers will disappear	56% Labor shortages	26% Climate change
3	12% Tougher regulations	8% More genetically modified food	32% More sustainable agriculture	9% Organic farming	11% Organic farming	52% Climate change	25% Small farmers will disappear

Question: 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?
% = amount of trends mentioned from farmers; multiple answers were possible

Farm Perspectives Study, 2014

	Total	US	BR	SP	FR	GE	IN	CH
Farmers	n=2,121	n=313	n=307	n=300	n=300	n=300	n=301	n=300
Consumers	n=7,233	n=1,062	n=1,024	n=1,028	n=1,051	n=1,013	n=1,031	n=1,024



Methodology

Farmers

- **300 farmer interviews** were conducted in each country among a representative sample of farmers
- In order to be able to directly compare results from the two waves of research, quotas were set in 2014 that replicated, as closely as reasonably possible, the profile of the farmers interviewed during the 2011 study (region, farm size, crops grown).
- Interviews:
 - Lasted up to 20 minutes and were conducted by telephone in all countries with the exception of India and China where face-to-face interviews were conducted.
 - Were conducted with the person solely or jointly responsible for major decisions for the farm, such as investments and product purchases.
 - Were conducted anonymously.

Methodology

Consumers

- **1,000 consumer interviews** were conducted in each country among a representative sample of the adult population*.
- In order to be able to directly compare results from the two waves of research, quotas were set in 2014 that replicated, as closely as reasonably possible, the profile of the consumers interviewed during the 2011 study.
- Interviews:
 - To provide continuity from the 2011 survey, the consumer interviews were conducted using an online panel in all countries.*
 - The consumer interviews lasted a maximum of 20 minutes.
 - Were conducted anonymously.

Note:
* In Brazil, China and India access to the internet is limited to approximately 50% or less of the population. As a consequence, in these countries, there is an unavoidable bias in the sample towards the better-educated, more affluent consumers living in urban areas with the necessary infrastructure.



More information:
www.farmperspectivesstudy.com



Further insights are available online:
www.farmperspectivesstudy.com

- 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.
- 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.
- 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.
- This poster shows the main findings from 2014.

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