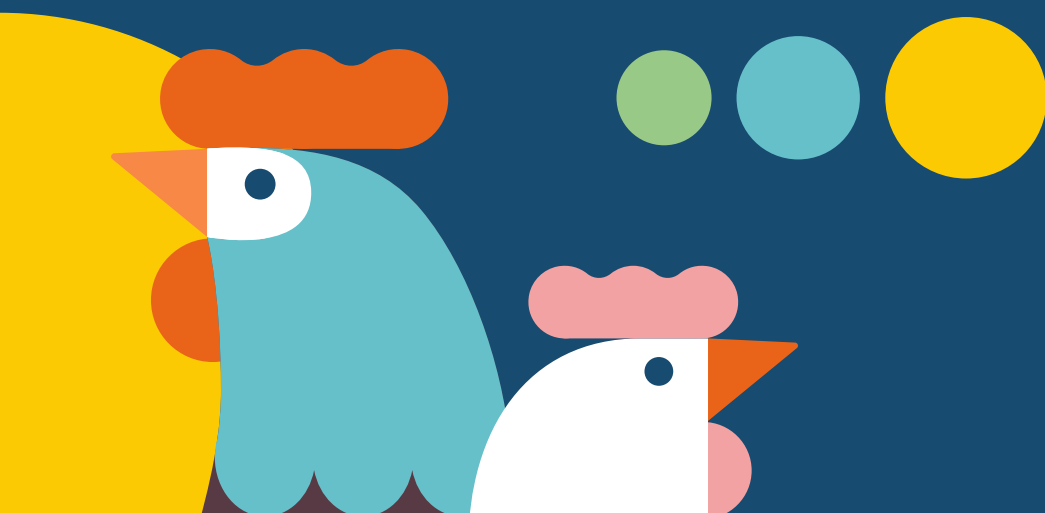




THE COMMON AGRICULTURAL POLICY (CAP): WHAT CONSUMERS WANT

A survey of consumers' understanding and expectations





Acknowledgements

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Views and opinions expressed do not necessarily reflect those of the European Union or EISMEA 2024

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KEY TAKEAWAYS

- Overall, the survey showed a positive attitude of consumers towards the agricultural sector.
- While most consumers have heard of the Common Agricultural Policy (CAP), few know the details, and the survey revealed that the way EU farm subsidies are currently spent is not in line with consumer expectations.
- For consumers, CAP subsidies should primarily support the income of small- and medium-scale farms and young farmers, while rewarding uptake of more sustainable practices (such as reducing use of pesticides and antibiotics and improving animal welfare).
- The CAP is not fully achieving the goal of ensuring reasonable prices for consumers.

¹Gathering five national consumer organisations and giving voice to a total of more than 1,5 million people in Italy, Belgium, Spain, Portugal and Brazil, Euroconsumers is the world’s leading consumer cluster in innovative information, personalised services and defence of consumer rights. Its European member organisations are part of the umbrella network of BEUC, the European Consumer Organisation. Together they advocate for EU policies that benefit consumers in their daily lives.

IN A NUTSHELL



Most surveyed respondents (**6 in 10**) have a positive opinion about the agricultural sector in their country yet tend to underestimate its environmental impact.



Consumers consider as priorities that European farm subsidies support: ensuring food supply and affordability, reducing use of pesticides and antibiotics and improving animal welfare. On the other hand, a number of consumers believe that some of these goals have not been met at all: ensuring reasonable prices for consumers (**29%**), reducing use of pesticides and antibiotics (**21%**), and ensuring generational renewal of farmers (**33%**).

Although almost **a third** of the EU budget goes to CAP and **7 in 10** respondents have heard of the CAP, only few know the details. Over **two-thirds** of consumers say that CAP subsidies should primarily target small- and medium-scale farms and young farmers while **half** of respondents consider it equally important that subsidies reward farmers who adopt sustainable practices and support income of those who struggle economically.

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On average, almost **8 in 10** consumers are aware of the farmers’ protests, but many are unaware of their specific claims. Austria is the only country where over half of respondents are unaware of the protests (because there were none in the country).

In total, **half** of consumers surveyed think the EU is primarily responsible for farmers’ difficulties, but there are national disparities. Respondents in France, Germany, Italy, and Poland regard the EU as the main culprit for farmers’ problems, while in Spain and Portugal, it is the national government – supermarket chains in Slovenia, and big food manufacturers in Austria.



Two-thirds of consumers think the CAP budget is just about right or should be higher, but less than **1 in 4** believe that CAP payments are distributed in a fair manner across countries and types of farms (while **21%** say they have no opinion about it).

When prompted on farmers’ grievances, around **6 in 10** respondents believe ‘unfair competition from third country imports’ and ‘low prices of agricultural products’ to be farmers’ main concerns. Environmental regulations rank lower in the list of perceived concerns, cited by **4 in 10** respondents.



2 in 3 respondents surveyed think that ‘the extra costs of sustainable agriculture should be absorbed by food industry and retailers without increasing consumer prices’. At the same time, while the intention-behaviour gap should be acknowledged, most respondents also claim they would be willing to pay more for food produced under certain (improved) conditions, especially food produced locally or with higher animal welfare.



In general, consumers consider larger farms to be better off financially compared to smaller farms and farm workers.



A third of consumers surveyed report difficulties dealing with food expenses in their household.

6/10

When asked about the financing of the transition to more sustainable agricultural practices, **6 in 10** respondents consider that farmers should be compensated for the extra costs primarily through increased public subsidies – and **60%** agree that ‘European subsidies should support the production of healthy and sustainable food only’.

WHY THIS SURVEY?

One of the European Union's oldest (1962) and most established policies, the Common Agricultural Policy (CAP) represents close to a third of the total EU budget for the period 2021-2027. The Treaty on the Functioning of the European Union (TFEU) sets out the main objectives assigned to the CAP, specifically: "to increase agricultural productivity", "to ensure a fair standard of living for the agricultural community", "to stabilise markets", "to assure the availability of supplies" and "to ensure that supplies reach consumers at reasonable prices".

Dubbed a "partnership between agriculture and society", the CAP has evolved over the years to reflect the EU's economic, social and environmental goals, including responding to societal demands on food.² On paper at least, the 2023 reform strengthened environmental and social (e.g. related to

some labour standards) requirements linked to CAP payments while introducing new financial incentives (so-called 'eco-schemes') for farmers engaging in practices benefitting climate, the environment or animal welfare. It also introduced new objectives in terms of meeting citizen's expectations for high-quality, safe and nutritious food, improving animal welfare, and combatting antimicrobial resistance. Yet, several environmental and climate conditionalities were rolled back as early as in the spring of 2024 through a rushed CAP 'simplification' carried out in response to the farmers' protests. As for food security/affordability, 8.3% of EU citizens could not afford a quality meal every other day in 2022.³ In 2024, food prices in the EU were 40% higher on average than the levels seen before the Russian invasion of Ukraine in 2022⁴ – while evidence shows that higher consumer food prices tend to push

households, especially lower-income ones, towards less healthy food, resulting in health-related issues.⁵ Although there is a substantial amount of public money at stake, there is also a lack of regular evaluations to examine whether the CAP's objectives are being achieved. As such, it is a fair and legitimate question to ask whether the CAP is still delivering good value for EU citizens.⁶

Breaking away from the status quo, the Strategic Dialogue on the Future of Agriculture⁷ recommended that the CAP post-2027 should provide socio-economic support targeted to the "farmers who need it most" and "promot[e] positive environmental, social, and animal welfare outcomes for society". The Vision for Agriculture and Food which was presented by the Commission on 19 February 2025 makes timid steps in this direction, yet falls short of responding to consumer concerns and expectations around food and how it is produced.

The next cycle of CAP reform is around the corner, with legislative proposals expected in the autumn of 2025 after the EU's plans for the next multiannual

budget have been unveiled in the summer (MFF, Multi-annual Financial Framework). Considering the geopolitical context and new EU political priorities, a bigger chunk of the MFF is expected to be channelled to defence and security, competitiveness and clean manufacturing – leaving question marks over the future amount and distribution of agricultural subsidies.

For the CAP to retain its 'social license' – and therefore a substantial budget – it needs to align more closely with how consumers would like farming subsidies to be spent and consumer expectations of the European food system should be considered in the distribution of subsidies. This BEUC

survey, therefore, seeks to explore consumers' perception of agriculture and farmers in general, their awareness of the CAP and take on how CAP money is currently being used, their preferences for how farming subsidies should be used in the future, as well as their attitudes towards the financing of the sustainability transition in the agrifood sector. We hope these findings can provide useful consumer insights for policymakers for the upcoming CAP reform.

Direct payments to farmers are allocated based on the **farmed hectares** (not the quantities produced) and regardless of whether it is produced for food, feed, industry or energy. They are **conditional**

on Good Agricultural and Environmental Conditions (GAECs) such as, for example, minimum soil cover or protection of wetlands. GAECs were 'simplified' – understand, watered down – in 2024.

In 2020, CAP direct payments accounted for 23% of farm income on average in the EU. Yet, dependence on direct payments varies greatly per country – up to over 40% in countries such as Lithuania, Latvia, Slovakia, and Sweden – and per sector – grazing livestock (predominantly beef and sheep), mixed farms and field crops are the farming systems most reliant on subsidies.

Payments are managed at national level by each EU country.



The CAP at a glance

The CAP is a common policy for all EU countries. It is managed and funded at European level from the resources of the EU's budget. The CAP is financed through two funds:

- The **European agricultural guarantee fund** (EAGF or "first pillar") primarily finances income support for farmers. These direct payments represent 72% of CAP funds for the period 2021-2027. Out of the total budget for direct payments, the largest part amounting to 51% comes as basic income support, 24% are linked to eco-schemes, while the remainder concerns various interventions such as to support young farmers. The EAGF also funds interventions in certain markets such as the fruit and vegetables, wine and olive oil sectors. Member States can regulate priorities and details.
- The **European agricultural fund for rural development** (EAFRD or "second pillar") finances rural development. Member States have an important role in designing and managing their national Rural Development Programmes.

²For the period 2023-27, the CAP is built around ten key objectives. These are: to ensure a fair income for farmers; to increase competitiveness; to improve the position of farmers in the food chain; climate change action; environmental care; to preserve landscapes and biodiversity; to support generational renewal; vibrant rural areas; to protect food and health quality; to foster knowledge and innovation.

³Namely a meal including meat, chicken, fish, or a vegetarian option. See European Commission State of Food Security in the EU report of spring 2024.

⁴See European Commission State of Food Security in the EU report of autumn 2024.

⁵European Commission (2023). Drivers of food security. SWD(2023) 4 final.

⁶The EU Court of Auditors published two reports (on organic farming and CAP strategic plans) showing that CAP spendings do not sufficiently align with the EU's green and climate ambitions.

⁷The Strategic Dialogue was announced by President von der Leyen in September 2023 in her State of the European Union speech, as part of the EU Commission's response to the farmers' protests. Launched in January 2024, it brought together stakeholders from across the whole agri-food chain, as well as non-governmental organisations and civil society representatives, financial institutions and academia. The Strategic Dialogue was tasked to develop a shared vision and recommendations for the future of EU food and farming.

METHODOLOGY

This survey is a joint effort between BEUC, ICRT (International Consumer Research and Testing), and Euroconsumers. The survey was done between January and February 2025 addressing consumers of 8 EU Member States (Austria, France, Germany, Italy, Poland, Portugal, Slovenia, and Spain). An English questionnaire was elaborated then translated and adapted to the national contexts. Eleven consumer organisations were involved: Altroconsumo (IT), Arbeiterkammer (AT), CLCV (FR), Deco Proteste (PT), CECU (ES), Federacja

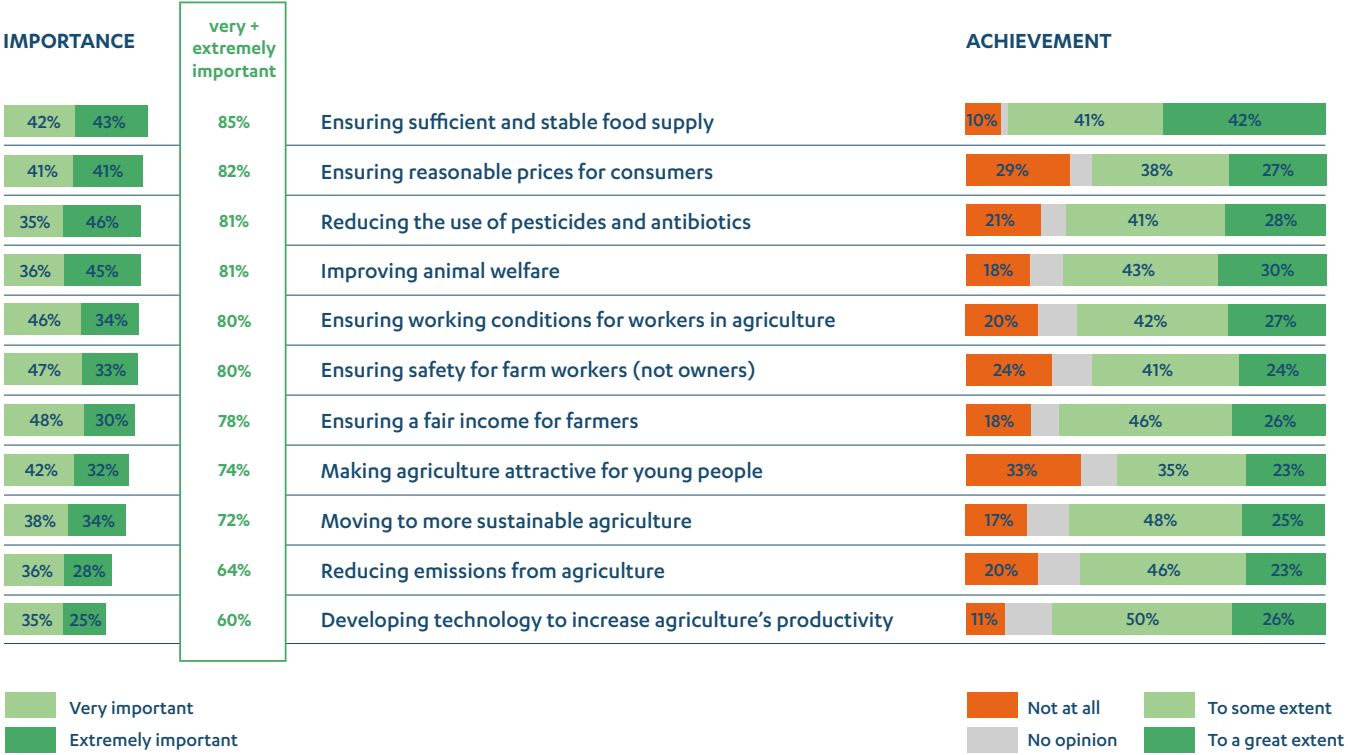
Konsumentów (PL), OCU (ES), UFC – Que Choisir (FR), vzbv (DE), VKI (AT), and ZPS (SI). The data which was collected via an online questionnaire was analysed by Euroconsumers. The questionnaire was administered to panels of around 1,000 respondents per country who were selected based on pre-defined interlocked quotas for age, gender and geographical location (according to the official statistics on the distribution of the national general population). Samples

were a-posteriori weighted for age, gender, educational level and region to be representative of the countries’ national populations. The fieldwork was carried out in parallel in all countries between 21st January 2025 and 10th February 2025. It is to note that surveys, such as this one, account limitations. We should consider the gap between people’s intentions and declarations and how they would behave. Nevertheless, the study provides valuable insights into consumers’ preferences and attitudes.



MAIN TAKEAWAYS

HOW IMPORTANT IS IT TO YOU THAT EUROPEAN SUBSIDIES FOR AGRICULTURE SUPPORT THE FOLLOWING OBJECTIVES? AND, IN YOUR OPINION, TO WHAT EXTENT WOULD YOU SAY THESE OBJECTIVES HAVE BEEN ACHIEVED SO FAR?



Consumers find it most important that European farm subsidies support ensuring food supply and affordability, reducing use of pesticides and antibiotics and improving animal welfare... Presented with a list of eleven objectives⁸ and asked about how important it is to them that European subsidies for agriculture support each of these objectives, respondents across all countries

surveyed prioritise ‘ensuring sufficient and stable food supply’ (85% find it ‘extremely’ or ‘very’ important), ‘ensuring reasonable prices for consumers’ (82%), ‘reducing the use of pesticides and antibiotics’ (81%), and ‘improving animal welfare’ (81%), followed by ‘ensuring a fair salary for farm workers’ (80%), ‘ensuring fair working conditions for workers in agriculture’ (80%), and ‘ensuring a fair income for farmers’ (78%).

While still seen as important overall, objectives such as ‘making the agriculture sector attractive for young people’ (74%), ‘having a more sustainable agriculture (protecting the environment and preserving biodiversity)’ (72%), ‘reducing emissions from agriculture (tackling climate change)’ (64%), and ‘developing technology to increase agriculture’s productivity and competitiveness’ (60%) are ranked lower by respondents.

⁸Objectives presented to respondents included: ‘Ensuring a fair income for farmers’; ‘Ensuring a fair salary for farm workers (not owners, employees, seasonal workers)’; ‘Ensuring fair working conditions for workers in agriculture (safety conditions, working schedules, etc.)’; ‘Ensuring reasonable prices for consumers’; ‘Ensuring sufficient and stable food supply’; ‘Reducing emissions from agriculture (tackling climate change)’; ‘Having a more sustainable agriculture (protecting the environment and preserving biodiversity)’; ‘Reducing the use of pesticides and antibiotics’; ‘Developing technology to increase agriculture’s productivity and competitiveness’; ‘Making agriculture sector attractive for young people’; ‘Improving animal welfare’.

MAIN TAKEAWAYS

... but a significant number think the policy has not achieved its goals in; ensuring reasonable prices for consumers, reducing use of pesticides and antibiotics, and ensuring generational renewal of farmers.

While ‘ensuring reasonable prices for consumers’ is seen as ‘extremely important’ by 41% of respondents, as many as 29% believe it has not been achieved at all. Strikingly, 1 in 2 Spanish respondents think that the objective of ensuring reasonable prices for consumers has not been met at all.

Similarly, 1 in 5 consider that ‘reducing the use of pesticides and antibiotics’ has not been achieved at all, whereas this objective is ‘extremely important’ to 46% of respondents.

A third of those surveyed also say that the objective of ‘making the agricultural sector attractive to young people’ has not been fulfilled at all. With a majority (57.6%) of farm managers above the age of 55 in the EU in 2020, and only 11.9% considered as ‘young farmers’ (i.e. under 40), the agricultural sector struggles to attract young people, and generational renewal is a key priority under the current CAP 2023-2027.

For consumers, CAP subsidies should primarily target small- and medium-scale farms and young farmers...

Over two-thirds of respondents across all countries surveyed believe that CAP subsidies should be primarily directed to small- and medium-scale farms (76%), followed by young farmers (69%). About

1 in 2 say that European subsidies should be targeted towards farmers working in difficult areas (mountains, dry land, etc.). A third consider that farm workers in general should benefit from CAP subsidies, while only 15% think that farming subsidies should support large-scale farms. Very few respondents believe that CAP subsidies should be directed toward social infrastructure in rural areas (kindergarten, family support, etc...) and regional authorities (city halls, regional administration).

... and half consider it equally important that subsidies reward farmers who adopt sustainable practices and support income of those who struggle economically.

1 in 2 respondents find it equally important that CAP subsidies reward farmers who adopt practices better for the environment or animal welfare and support the income of farmers who struggle economically. 28% find it more important that farming subsidies reward sustainable practices – rather than supporting farmers’ income – whereas 20% believe the opposite.

7 in 10 consumers have heard about the CAP ... but few know the details.

Less than 1 in 4 respondents say that they have never heard of the CAP – another 8% are not sure. Only 1 in 10 have heard about it and know the details. The majority by far (59%) has heard about the CAP but does not know the details.

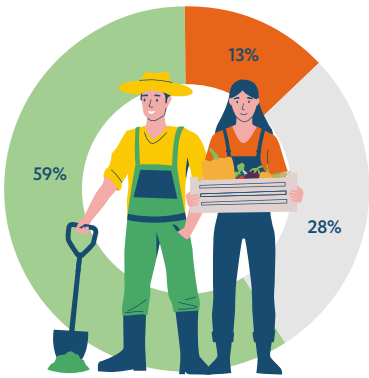
Respondents are also unsure about the benefits of the CAP for themselves. Only 4 in 10 agree that ‘the CAP brings

benefits to all European consumers and not only farmers’ – 19% disagree.

6 in 10 consumers have a positive opinion about the agricultural sector in their country yet tend to underestimate its environmental impact.

On average, 59% of respondents have a positive image of the agricultural sector in their country. About 1 in 10 view the sector negatively, while 3 in 10 have a neutral or no opinion. Consumer perception varies across countries, though. Only 36% of Slovene consumers have a positive image of the sector, as opposed to Spanish (74%), Italian (72%) and French (70%) consumers.

IN GENERAL, WHICH IS THE IMAGE YOU HAVE ABOUT THE AGRICULTURE SECTOR IN YOUR COUNTRY?

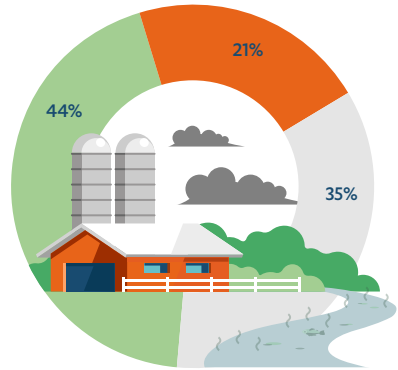


Positive
Negative
Neutral + no opinion

While respondents have mixed views about the environmental impact of agriculture in their country, their perception is positive overall. On average, 44% believe

agriculture’s environmental impact to be positive, while 21% have a negative opinion. Over 1 in 2 Italian, Polish and Slovene respondents think that agriculture has a positive environmental impact in their country, as opposed to only about a third of Austrian and German respondents.

HOW DO YOU PERCEIVE THE ENVIRONMENTAL IMPACT OF AGRICULTURE IN YOUR COUNTRY?



Positive
Negative
Neutral + no opinion



Consumers consider larger farms to be better off financially compared to smaller farms and farm workers.

Most respondents (52%) consider that large-scale farms are in a good economic situation (18% believe they are not). By contrast, views are mixed when it comes to the economic situation of small- and medium-scale farms, with almost as many surveyed individuals (36%) believing they are in a good economic situation as the opposite (37%). 55% of respondents agree with the statement that ‘only big farms can be price competitive’ – while 20% disagree.

The economic situation of farm workers is perceived as even less favourable than those of farmers, with only 26% of survey respondents considering their economic situation as ‘good’ (as opposed to 45% seeing it as unfavourable).

Taking a closer look, the economic situation of small and medium-scale farms is perceived more favourably in Slovenia, Italy, and Poland. The countries where respondents perceive the biggest gap between the economic situation of large-scale versus small and medium-scale farms are Poland, Portugal and Austria.

The environmental impact of agriculture in the EU

Unlike most respondents’ perception, the agriculture sector – however strategic and vital to the EU and its citizens – does have negative environmental impacts, which are well documented.

■ Agriculture is responsible for 11% of all greenhouse gases (GHG) emitted in the EU, including over 54% of all methane emissions. Nearly 70% of these agricultural emissions come from the animal sector.

■ Despite legislation addressing nutrient pollution, the average nitrate concentration in EU groundwaters did not change significantly over the past 20 years. High levels of nitrate in groundwater pose environmental and health threats.

■ Agriculture contributes to 94% of all ammonia emissions.

■ Agricultural activities (together with urbanisation) are the most

frequently reported pressures for both bird habitats and species.

■ In 2020, one or more pesticides were detected above thresholds of concern (a risk to human health) at 22% of all monitoring sites in rivers and lakes across Europe. In terms of soil pollution, 83% of agricultural soils tested in a 2019 study contained pesticide residues.

Source: European Environmental Agency

MAIN TAKEAWAYS

Smaller farms are struggling most with income

According to data from the FADN (Farm Accountancy Data Network) public database managed by the European Commission, out of the 3.5 million commercial farms in the EU⁹, 67% have an economic size of less than EUR 50,000 per year¹⁰. Another 13.5% have an economic size of between EUR 50,000 and EUR 100,000 per year and close to 20% have an economic size above EUR 100,000 per year.

There are different ways of measuring farm income. The **Farm Net Value Added** (FNVA) is expressed in euros per Annual Work Unit (AWU) and is equal to gross farm income minus depreciation costs. The **Family Farm Income** (FFI) is expressed per Family Work Unit (FWU) and is most useful when agriculture is organised in the form of family farms (using unpaid labour).

The table below shows that, the **smaller the economic size of the farm, the smaller the income**. Under current market conditions, many farms must increase production and size and to specialise (for efficiency gains) if they want to raise their income.

Year	Economic Size (EUR)	Farms represented (nb)	Total output (€/farm)	Farm Net Value Added (€/AWU)	Family Farm Income (€/FWU)	Share of farms (%)
2022	(1) 2 000 - < 8 000	611,202	10,156	4,211	3 ,751	17.47%
	(2) 8 000 - < 25 000	1,198,277	23,385	12,066	11,464	34.26%
	(3) 25 000 - < 50 000	528,821	52,893	20,998	20,380	15.12%
	(4) 50 000 - < 100 000	474,911	99,810	32,096	33,312	13.58%
	(5) 100 000 - < 500 000	568,380	303,819	55,968	67,224	16.25%
	(6) >= 500 000 EUR	116,339	1,599,995	73,721	189,401	3.33%

Source: FADN database, 2022 data (exc. Croatia)

Most consumers are aware of the recent farmers’ protests, but many are not aware of what their specific claims are.

In total, close to **8 in 10** respondents know of the farmers’ protests that have been occurring across Europe since

December 2023. A **third** say they are aware of the protests and familiar with (some of) the farmers’ claims, but a bigger group (**42%**) say they know of the protests but not of the farmers’ claims. Austria is the only country where over **half** of respondents are unaware of the protests – which can

be explained by the fact that very few farmers took to the street in the country¹¹. Respondents know (or think they know) best about the farmers’ claims in France (**55%**), Poland (**46%**) and Spain (**43%**).

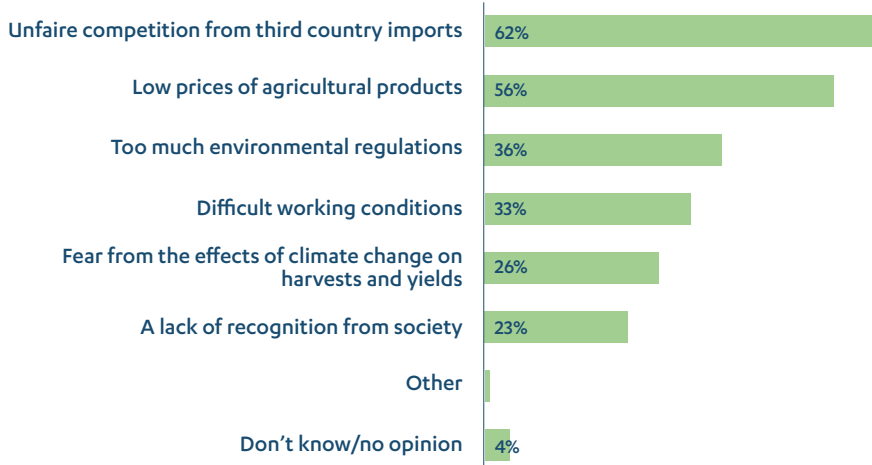
ARE YOU AWARE ABOUT RECENT PROTEST OF FARMERS?



When presented with a list of challenges facing farmers¹² and asked to pick up to three considered to be the most pressing, **62%** of respondents believe ‘unfair competition from third country imports’ to be at the top of farmers’ problems, followed by ‘low prices of agricultural products’ (**56%**). ‘Too much environmental regulations’ (**38%**) and ‘difficult working conditions’ (**33%**) come further down the list. Less than **a third** of surveyed individuals identify ‘fear from the effects of climate change on harvests and yields’ as a key concern for farmers.

In France, Italy, Poland, Portugal, and Slovenia, ‘unfair competition from third

WHICH ARE THE MAIN CONCERNS/PROBLEMS OF FARMERS?



country imports’ is seen as one of the main farmers’ problems. In Austria and Germany, ‘low prices of agricultural products’ is considered to be the main concern for farmers, while in Spain, low prices and unfair competition from third countries are perceived as equally problematic and coming at the top of farmers’ difficulties. In France and Germany ‘environmental regulations’ is the second most mentioned issue for farmers (with **1 in 2** respondents in these countries selecting this item), whereas less than **1 in 3** Italian and Portuguese respondents cite it. ‘Fear from the effects of climate change on harvests and yields’ is believed to be amongst farmers’ main problems by a **fourth to**

a third of respondents in all countries but France, where only **17%** of those surveyed see it as a concern. France, Italy, Portugal and Spain are the countries where ‘difficult working conditions’ is most often cited as one of the main difficulties for farmers.

Respondents who say they know (some of) the farmers’ claims are more likely to mention ‘unfair competition from third country imports’, ‘low prices of agricultural products’, and ‘too much environmental regulations’, and on the other hand slightly less likely to cite ‘fears from the effects of climate change on harvests and yields’ and ‘difficult working conditions’.

⁹There are 9 billion farms in total in the EU, yet not all of them are considered as ‘commercial’ farms – i.e. large enough to provide a main activity for the farmer and a level of income sufficient to support the farmer’s family.
¹⁰A farm’s overall economic size is calculated with the sum of all the standard output per hectare of crop and per head of livestock in a farm, expressed in euro. Eurostat Glossary, Accessed April 2025.
¹¹See article published in Kronen Zeitung on 11 March 2024. Accessed on 5 March 2025.
¹²Including: ‘Unfair competition from third country imports’; ‘Low prices of agricultural products’; ‘Too much environmental regulations’; ‘Fear from the effects of climate change on harvests and yields’; ‘A lack of recognition from society’; ‘Difficult working conditions’; ‘Other’.

MAIN TAKEAWAYS



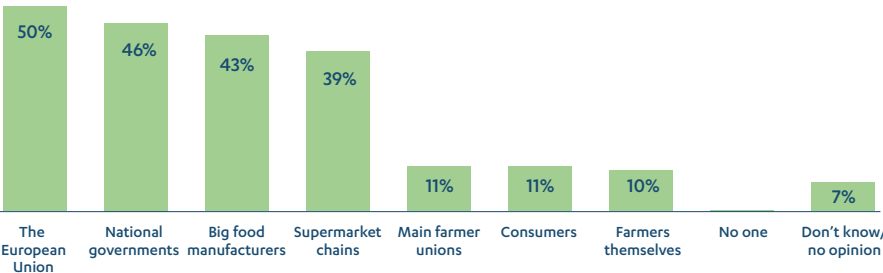
Why the farmers’ protests?

While protests unfolded in many countries across Europe, farmers’ complaints varied markedly between and within countries – ranging from unfair competition from cheap imports and free trade deals, through to low prices and high input costs, delayed CAP payments, EU regulations, and the planned withdrawal of some tax exemptions for diesel fuel used in agriculture. Various farmers’ associations also prioritised different demands, whose prominence in the public debate was largely influenced by that of said associations. A mapping of farmers’ main demands was published by the EU media POLITICO in January 2024.

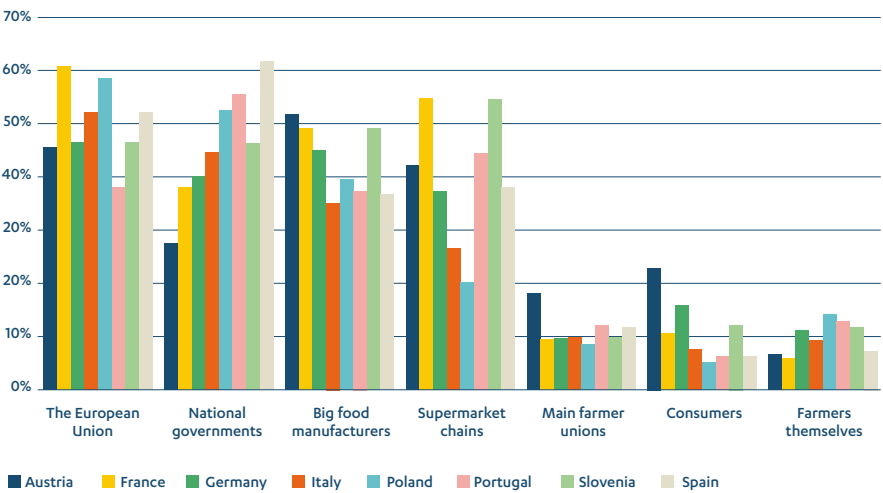
This diversity of farmers’ demands is reflected in consumers’ replies. Likewise, the conclusion of the EU-Mercosur trade deal during the month preceding the survey field work – and the related concerns that were publicly voiced by farmers organisations and reported in the media – might also have played a role in influencing respondents’ replies.

Consumer views are split across countries on who is (mainly) responsible for farmers’ difficulties, but the EU is seen as a big part of the problem.

WHO DO YOU THINK IS (MAINLY) RESPONSIBLE FOR FARMERS CONCERNS/PROBLEMS?



WHO DO YOU THINK IS (MAINLY) RESPONSIBLE FOR FARMERS CONCERNS/PROBLEMS? BY COUNTRY



On average, **1 in 2** respondents in all countries consider the EU to be primarily responsible for the challenges faced by farmers, followed by national governments (**46%**), big food manufacturers (**43%**) and supermarket chains (**39%**). Only **1 in 10** respondents see farmers unions and consumers as (mainly) responsible for farmers’ difficulties.

However, replies vary across countries. In 4 countries out of 8 (France, Germany, Italy, Poland), the EU is seen as the main culprit. Austrian respondents see big food manufacturers as primarily responsible, while in Slovenia it is supermarket chains, and national governments in Spain and Portugal.

Few respondents (**11%**) identify themselves as responsible (as consumers) for the difficulties faced by farmers – with the remarkable exception of Austria, where **23%** do so. Likewise, only around **1 in 10** respondents perceive the ‘main farmers unions’ and ‘farmers themselves’ to be primarily responsible for farmers’ struggles.

Respondents’ general attitude towards the EU might have influenced their replies, however, with only about **half** agreeing with the statement that, ‘in general, the European Union brings benefits to their country’ – and **1 in 4** disagreeing.

Two-thirds of consumers think the CAP budget is just about right or should be higher...

The CAP budget seems fair to **36%** of respondents, while another third (**31%**) believe it should be higher. Remarkably, **23%** of respondents do not know or have no opinion. **1 in 10** consider it should be lower. Austria and Germany are the countries with the highest proportion of respondents (around **15%**) saying that the CAP budget should be reduced. Compared to an EU-wide poll¹³ which found that **56%** of EU citizens think that the level of financial support to farmers is about right, our survey revealed greater uncertainty in the public opinion vis-à-vis the size of the CAP budget.

At the same time, views are split on whether providing permanent direct aids to all farmers is good for the economy or not – **34%** believe that it is not good, **32%**

on the contrary think that it is good and another **34%** have a neutral or no opinion.

... but less than 1 in 4 believe that CAP payments are distributed in a fair manner

32% of respondents disagree with the statement that ‘the way European subsidies are distributed is fair enough towards their country (compared to other EU countries)’ – only **23%** agree. Likewise,

34% disagree that ‘the way European subsidies are distributed among the different types of farms is fair/appropriate in their country’ – only **22%** agree.

A third of consumers report difficulties dealing with food expenses.

41% respondents across all countries surveyed find it neither difficult nor easy to deal with food expenses in their

Which farmers get the most subsidies in the EU?

The uneven distribution of CAP direct payments – between types of farms and between EU countries – is a long-standing issue. During the 2014-2020 period, 20% of CAP beneficiaries received 80% of subsidies. As the rules have not been significantly changed and are largely the responsibility of Member States, it is uncertain whether the current CAP (for the period 2023-2027) will lead to a fairer distribution of income support direct aids. However, it is not possible at this stage to assess this improvement and quantify whether it will lead to a significantly fairer

distribution of direct payments. In its Vision for Agriculture and Food, the Commission has already signalled its willingness to consider “enhanced use of measures such as degressivity and capping” in the CAP after 2027. However, it should be noted that previous attempts to impose mandatory limits on large farm subsidies have failed due to resistance from some Member States.

Media investigations have also exposed how billionaires-owned companies have received generous farming subsidies from the EU.



¹³Special Eurobarometer 556. Europeans, Agriculture and the CAP. Published in January 2025.

MAIN TAKEAWAYS

household. **25%** say that it is easy, but **34%** find it difficult.

The past couple of years have been marked by high food inflation. While a stabilisation of food prices has been observed over the course of 2024, food prices remain 40% higher on average than the levels seen before the Russian invasion of Ukraine in 2022.¹⁴ Eastern EU countries have shown the highest increases in food prices compared to other Member States. Yet, respondents in France and Portugal are those indicating the greatest difficulties dealing with food expenses (about **4 in 10** find it difficult), while Slovene respondents are those reporting least difficulties (**26%** find it difficult). Poland, Germany and Austria are the countries with the highest share of respondents (about a **third**) finding it easy to deal with food purchases.

Confirming the challenges around food affordability, **1 in 4** respondents disagrees that ‘they are still able to afford food produced sustainably even it is more expensive’ – while **1 in 2** agreed they would be able to afford it.

On whom should pay for the transition to more sustainable farming, consumers see primarily a role for industry and retailers as well as for public subsidies.

2 in 3 consumers agree with the statement that ‘the extra costs of sustainable agriculture should be absorbed by food industry and retailers without increasing consumer prices’ (only **1 in 10** disagree). Asked specifically about the role of public subsidies versus that of the market, a majority (**6 in 10**) consider that farmers

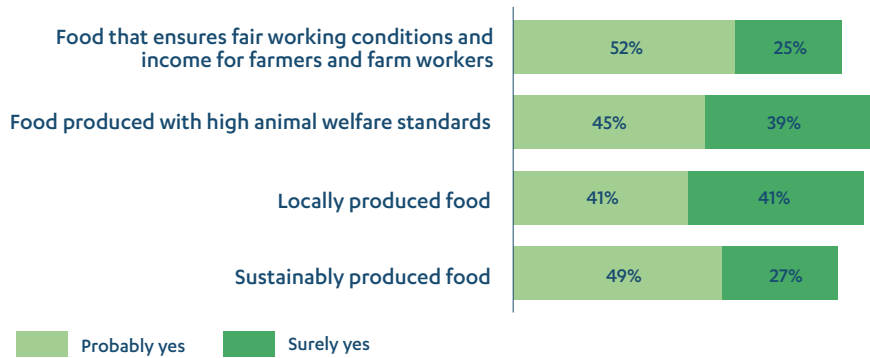
should be compensated for the extra costs of adopting more sustainable practices primarily through increased public subsidies. Only **16%** say this should be through higher market prices. **60%** also agree that ‘European subsidies should support the production of healthy and sustainable food only’ (**16%** disagree).

On average, **45%** of respondents think that ‘EU farmers need to change the way they work in order to fight climate change even if that means being less competitive’ – **24%** disagree. **44%** also think that ‘emissions from agriculture

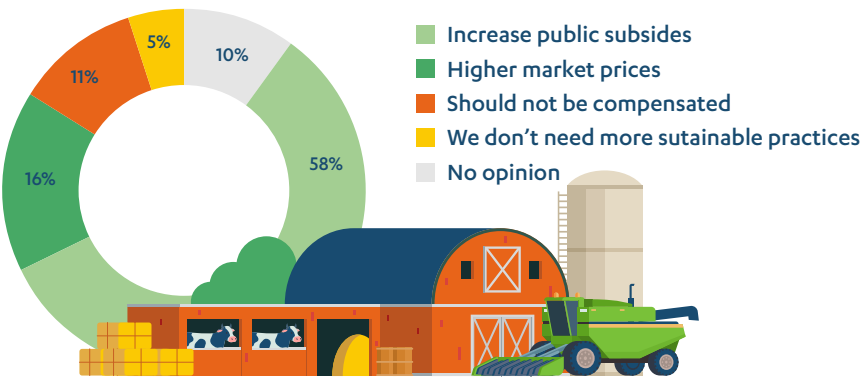
should be charged the same way as for other industry sectors’, but **27%** disagree.

Lastly, when asked if they would be willing to pay more for food produced under certain (improved) conditions, a surprisingly high proportion of respondents reply that they would, surely or probably – especially for food produced locally and food produced with high animal welfare standards. However, this must be nuanced considering the previous question indicating difficulties dealing with food expenses for a third of respondents as well as the intention-behaviour gap in such surveys.

WOULD YOU BE WILLING TO PAY MORE FOR THE FOLLOWING TYPES OF FOOD?



HOW DO YOU THINK FARMERS SHOULD BE (PRIMARILY) COMPENSATED FOR THE EXTRA COSTS OF HAVING MORE SUSTAINABLE PRACTICES IN OUR AGRICULTURE?



WHAT SHOULD POLICYMAKERS MAKE OF THESE RESULTS?



The Commission floating major changes to the structure and priorities of the next EU Multiannual Financial Framework for the 2028-2034 period has left many wondering about the CAP budget post-2027. While our survey revealed broad support for securing a strong CAP budget overall, it also showed that the way farm subsidies are currently being used and distributed does not sufficiently align with consumer priorities. **For the CAP to retain its ‘social license’, it needs to better reflect societal expectations about food, how it is produced, and by whom.** Here are our policy takeaways and recommendations:

- In line with consumers’ expectations revealed by our survey – and reflecting the recommendations from the Strategic Dialogue on the Future of Agriculture in the EU – the next **CAP must be much more targeted**. This will ensure a more efficient use of the EU public’s money, while bringing simplification at the same time by focusing on a limited set of key objectives. As such:
- CAP subsidies should primarily **support the income of small- and medium-scale farms as well as young farmers**, notably through the enhanced use of measures such as degressivity and capping, as envisioned in the Vision for Agriculture and Food. The CAP post-2027 should also ensure a fairer distribution of CAP payments across the Member States.
- CAP subsidies should **reward those farmers – big and small – who adopt sustainable practices** responding to key environmental and social challenges such as reducing the use of pesticides and antimicrobials in farming, improving animal welfare, preserving biodiversity, and reducing emissions from agriculture. This

¹⁴European Commission (2024). *State of Food Security in the EU*. A qualitative assessment of food supply and food security in the EU within the framework of the EFSCM. Autumn 2024.

WHAT SHOULD POLICYMAKERS MAKE OF THESE RESULTS?

requires increasing the share of direct payments allocated to 'eco-schemes' and ensuring these 'eco-schemes' are both financially attractive to farmers and ambitious enough to trigger real practice changes.

Our survey revealed **worrying levels of concern over food affordability, and dissatisfaction about the CAP when it comes to ensuring reasonable prices** for consumers – as established by the TFEU. Against these findings, the Commission should produce a study assessing the extent to which, if at all, the CAP can still play a role in securing affordable food for consumers. Indeed, while the CAP – and the significant budget allocated to it – is often justified by its positive effect on consumer prices, this effect appears to be limited. Should the study conclude that today’s CAP can only do little to ensure reasonable prices for consumers, it would be pertinent that it also explores which instruments (e.g. as part of a reformed CAP), tools (such as price observatories like the EU Agri-Food Chain Observatory) and policies (e.g. competition and fiscal policies) could effectively play a role in making (healthy) food affordable to all consumers.

■ The **financing of the transition to sustainable agricultural practices must be fair to consumers and farmers**, who cannot be the ones shouldering all the costs. Consumers expect the middle of the chain (industry and retailers) to take their fair share of these costs, but they also see a strong role for public subsidies in financing the transition. The CAP represents a

significant portion of the EU budget and the interests of consumers must be taken into account.

Ultimately, moving away from today's siloed approach, the CAP must evolve to become a **Common Agricultural and Sustainable Food policy**. This would reflect the strong connection between the supply and demand side and would serve to foster greater coherence across EU policies affecting food. As the agricultural sector moves towards more sustainable practices and productions, it is vital that this is accompanied by changes on the demand side at the same time – highlighting

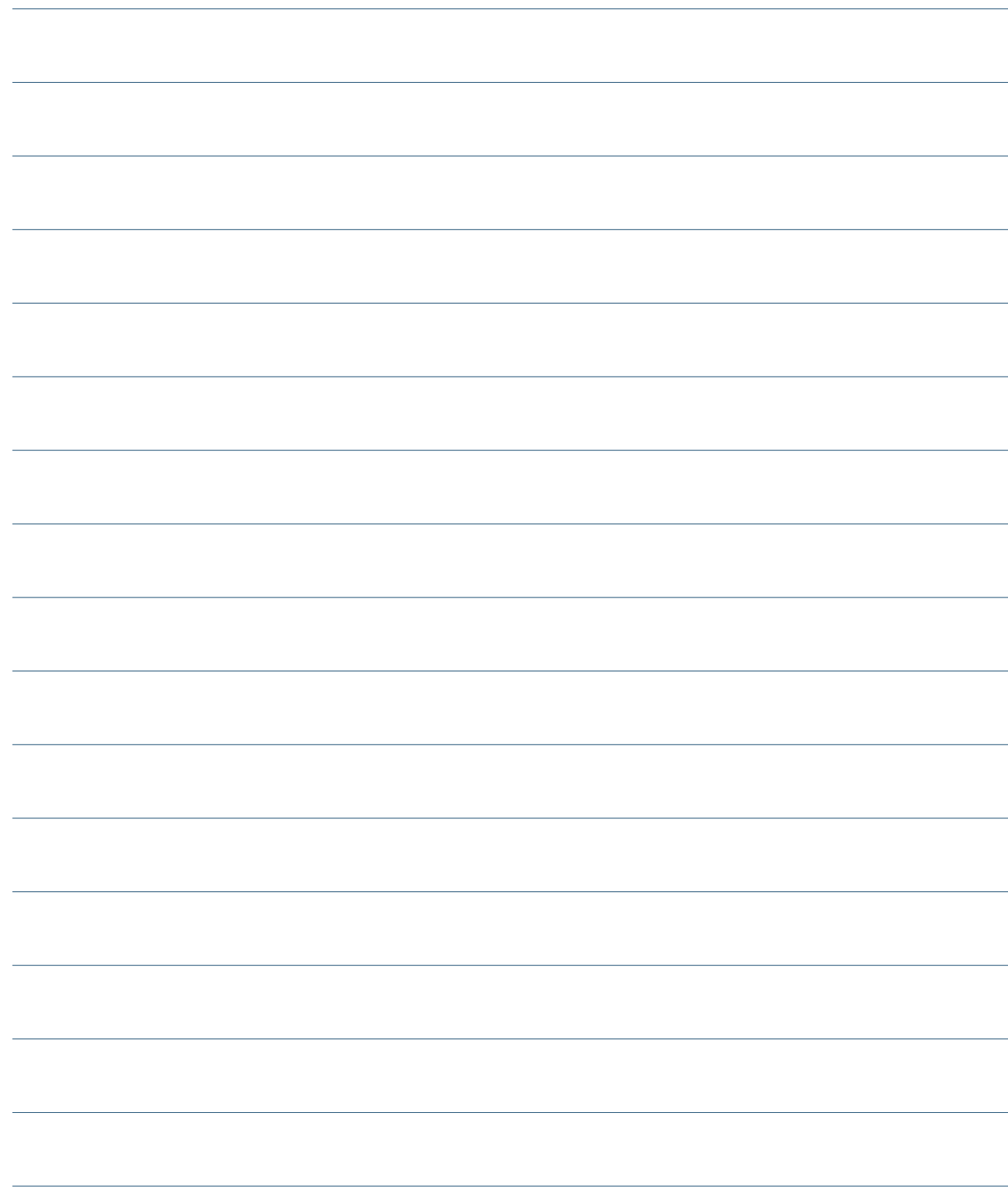
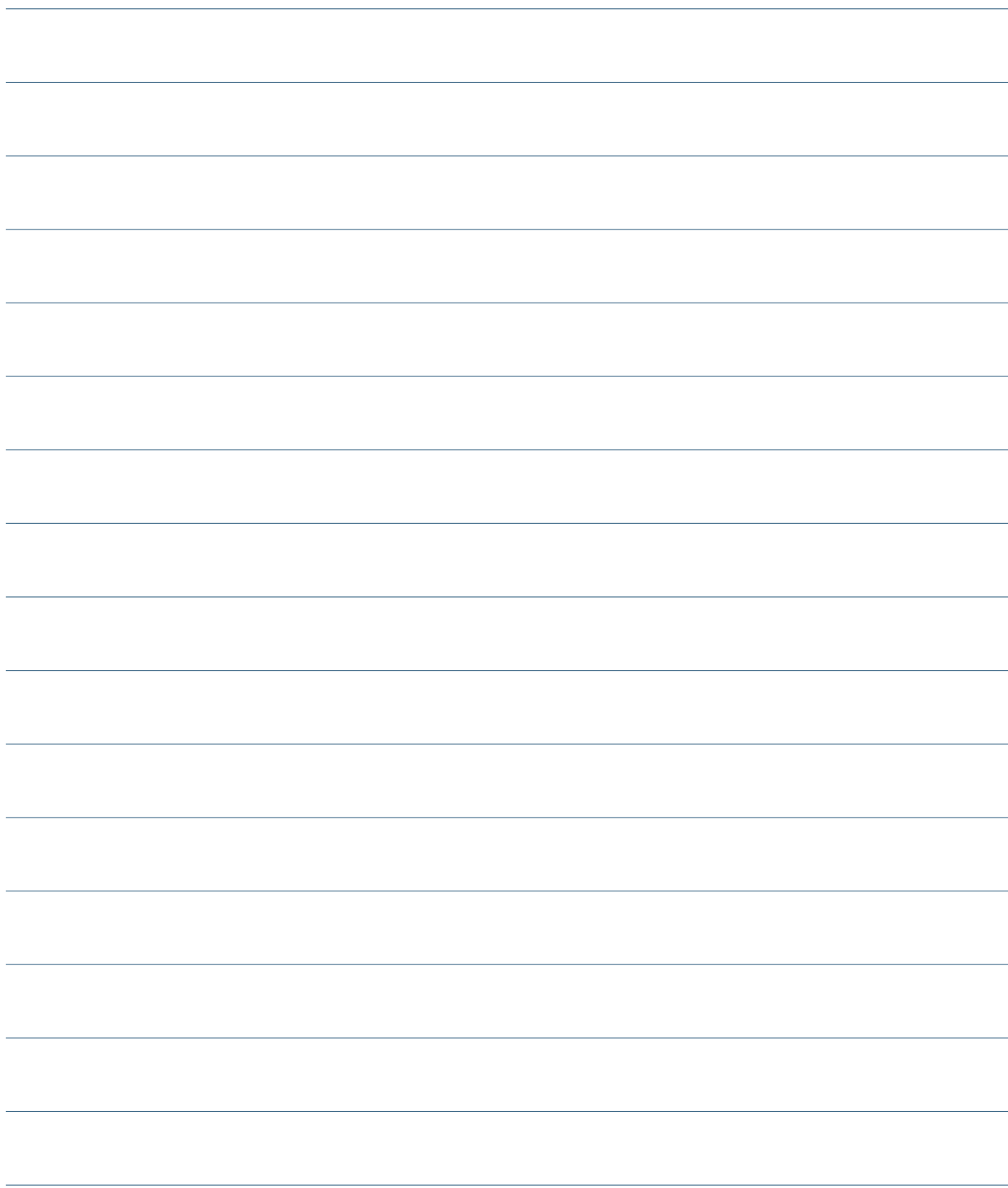
the need for policies targeting not only production, but also policies focusing on consumption such as the improvement of food environments.

Greater citizens' involvement is needed in designing the CAP and what it serves for. While the technical and complex nature of this policy makes it challenging for citizens/consumers to engage with the CAP in practice, the Commission and Member States should find ways to involve them in a meaningful manner – such as through organisations representing them (notably consumer organisations) and via citizens' panels.



NOTES

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THE COMMON AGRICULTURAL POLICY (CAP): WHAT CONSUMERS WANT

A survey of consumers' understanding and expectations

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