



The Resilience Gap: INNOVATING FOR EUROPEAN AGRICULTURE

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FARMER INTERVIEWS



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Farmer Interviews: Cross-Market Key Themes

This summary draws on interviews with around 90 farmers across eight European markets. It sets out what farmers said about profitability, climate impact, crop protection, innovation, regulation and public perception, and what they say they need. It covers farmer from markets across the United Kingdom, Spain, Romania, Poland, Germany, Belgium, France and Italy.

1. Profitability under pressure

Farmers most often blamed price, not only cost, for their farms failing to turn a profit. With farm-gate prices reported at levels equivalent to 10 years ago, most farms are operating on narrow margins or struggling to break even. Farmers reported having no influence over the prices they receive, while energy, fertiliser, fuel and labour costs increased significantly across every market. Many have turned to diversification to keep their businesses viable. Farmers see themselves as central to national food security, yet almost none believe politicians share that view, and the pressures are putting the future of the family farm at risk.

"Right now we're a bit suffocated because everything takes so much effort to do... costs are too high and we're not paid a decent profit." – Vineyard or permanent crops farmer, Dos Hermanas, Spain

"In 25 years the minimum wage went up by 580 percent. Wheat remains at the same price." – Arable or combinable crops, 45-54, Łódzkie, Poland

"There's a permanent rise in costs and selling prices that are stuck, or even falling... It used to be one bad year every three or four years. Now it's more like one good year every five or six." – Arable or combinable crops, 55-64, Reims, France

2. The cost of inaction: climate and water

Farmers are hit hard by weather, climate volatility and unpredictability, and almost everyone said the climate has changed. They described hotter summers, drought followed by a deluge of rain, and reduced or spoiled yields. Extreme weather makes planning hard and is making farmers reluctant to invest.

"We've had almost eight weeks without rain... climate change is clearly happening, but you don't know which direction it's going." – Arable and vegetable farmer, Brugge, Belgium

"This year you can really see it: there's very little harvest. Everything has been burned by the heat." – Arable or combinable crops, 35-44, Toulouse, France

"This year was the fourth heatwave. You notice fruit-set fails in tomatoes and peppers, no new fruit forms." – Vegetable farmer, Horst, Netherlands

3. A shrinking toolbox: crop protection, regulation and barriers to innovation

Farmers want the same toolkit as their global peers. What concerns them is how fast products are being withdrawn: what used to take one pass with a product has become multiple passes with different products because alternatives differ. They voiced concern about a dwindling list of active substances, growing resistance to those that remain, and new products not coming to market quickly enough. Farm size and regulation were the biggest barriers to technology and innovation adoption.

"The list of crop protection products gets narrower every year, and sometimes we have no products at all that can deal with a pest or weed problem. Because there are fewer of them, we can't rotate, and pests become resistant to the active substances... I'd say our costs have gone up by around 30 to 40 percent." – Arable farmer, Zamość, Poland

"That tool has now been taken away, and in autumn... we go out two or three times with a sprayer... I consider that absolutely unsustainable" – 45-55, Mixed Farming, Osnabrück area, Germany

"Flufenacet is banned for weed control in cereals. We are almost at a dead end now, because molecules have been taken away and there are no new ones to replace them." – Arable farmer, Hauts-de-France

4. Innovation and genome editing

Farmers are not resistant to innovation. They are adopting new technology where they can see it paying off on their own farm, with drone spraying and pest detection widely embraced. Genome editing is one example of this openness: just under two-thirds of farmers would grow edited varieties or consider it, and only around a dozen were against. It could deliver heat- and drought-tolerant varieties far faster than conventional breeding.

"With CRISPR-Cas, within a species, if you find resistance or drought tolerance in a wild plant – why shouldn't we use that" – Mixed farming, Over 65, Rheinhessen, Germany

"I really don't have an issue with [gene-edited seeds]. You're just adapting to what would have happened anyway." – 51, Arable or combinable crops, Leeds, UK

"If a drought-resistant variety comes out tomorrow, I'll buy it – it's in my interest." – Arable or combinable crops, 35-44, Feldioara, Romania

5. A science-first, predictable approach to regulation

Farmers are not resistant to regulation, but want it to be predictable, and at the moment it is not. They described subsidy schemes changing overnight, approvals that took a decade, and regulations that were implemented, found to have no scientific backing, and abandoned shortly after. Farmers want regulators to be independent of politics and campaigns, with decisions backed by science, and described bureaucracy as disconnected from farmer reality.

"It [regulations] should basically be on science. And if the science says it's safe... and it's used elsewhere in the world, we should have access to it. It's as simple as that." – Mixed farming, 55-64, Driffield, UK

"You're not even finished with one rule and the next is already on its way..." – Fruit or vegetables, 45-54, Puurs, Belgium

"In Brazil they can bring a biological product to market in six years. Here in Europe it can take ten. A Belgian company like Biotalys applies in Florida first before it comes to Europe." – Under 35, Glasshouse grower, West Flanders, Belgium

6. Consumers and public perception

Farmers feel undervalued. They perceive the public to be sympathetic but sometimes lacking knowledge of the challenges of farming, and think its priority is cheap food. Farmers feel the public has only a partial picture of where food comes from or what farming costs them. They also think people are unaware of what is required to produce it.

"It's a very underestimated job, because people take it for granted. They go to the supermarket and see everything laid out on the shelves, but they don't see the work behind it." – Fruit or vegetables, 35-44, Valencia, Spain

"When people move to the village from the city, they first have to learn why the tractor or the combine has to run on a Sunday... The urban population has little idea about practical farming, and what they get from the internet or influencers is usually not quite right." – Mixed farming, 64, North Hesse, Germany

“We just have to value our farmers like we value our health service, we value the army, we value the police and the fire service... because we're putting food on the table. And if that was to disappear, and God forbid we were in a war, where would the food come from?” – Arable or combinable crops, 51, Leeds, UK

Conclusion

Across all eight markets, farmers described the same squeeze: little say over the prices they receive, rising costs, and weather that is harder to predict every year, while the tools they need to adapt are being withdrawn faster than replacements arrive. This is not a picture of resistance to change: farmers are already adapting, and most are open to gene editing.

What they lack is not willingness but the means: margins that make investment worthwhile, a toolkit that keeps pace with their global competitors, and regulation that is predictable, explained and grounded in science rather than politics. Their warning is consistent: food security is assumed rather than protected, and if domestic production fails, it will fail suddenly. The window to act has not closed.