



# Public Debate on the future of the CAP post 2013

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## *Key Findings*

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within the Ministry for Resources and Rural Affairs, Malta

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## **Scope of the document**

In view of the upcoming discussions on the future of the Common Agricultural Policy (CAP) post 2013, the European Commission has launched a broad public debate with the citizens of the EU. In view of this debate the European Commission has invited the 27 EU Member States to engage with their sector stakeholders and citizens (as consumers) to obtain their views on how the current CAP has performed and what the CAP post 2013 should consist of.

Following this call, the Maltese National Rural Network within the Ministry for Resources and Rural Affairs in Malta undertook a number of initiatives to gather the views of the stakeholders in Malta and of the Maltese citizens.

The scope of this document is to put together in a structured way the main findings and conclusions that have emerged from the research undertaken over the past weeks. It is hoped that this document will provide useful inputs into the wider European debate on the future of the CAP post 2013.

It must be emphasised that the views expressed in this document are a reflection of the views expressed by the general public and by the sector stakeholders but do not in any way represent the views of the Government of Malta.

## Summary of main findings

From the findings that emerge from both the general public as well as the main stakeholders of the agricultural sector it is clear that there is a convergence of attitudes on a number of key issues related to the sector, although the findings among the general public must be read in a context of low awareness of what the existing CAP delivers. Both groups largely agree on the importance of having a common agricultural policy which can ensure the preservation of Malta's rural landscapes through the protection of the environment, and which also supports the agricultural sector to achieve important goals such as the provision of quality goods, high standards of animal welfare and income stability for the farming community.

There was also convergence when it came to identifying the most important objectives that a future CAP should have. Both the general public and the main stakeholders identified the production of more healthy agricultural products, the sustainability of the sector, the protection of the environment, tackling the effects of agriculture on climate change and the more efficient use of water resources as being challenges of a post 2013 CAP.

## The view of the general public

### Awareness of CAP

A low awareness of the CAP was found to exist amongst the general public. 75% survey interviewees claimed that they have never heard of or read about the European Union's Common Agricultural and Rural Development Policy. On the other hand, 25% stated that they have either heard or read about CAP (9.3%), or indicated that they were aware of the Policy but lacked the proper information (15.3%). The high percentage of unawareness on the CAP may indicate that the current information initiatives may not be having the required effect, and/or that the CAP is not of interest to the general public since it may be perceived as more relevant to the agricultural sector.

### Importance of EU financial support to agriculture

From the responses received it is clear that the general public recognises the importance of EU financial support to agriculture. The following percentages indicate that respondents agreed/strongly agreed that EU financial support to the Maltese agricultural sector is needed to:

- Face unforeseen events such as drought, flooding, crop and animal diseases – 93.5%
- Remain strong, competitive and sustainable – 93%
- Ensure the provision of agricultural products all the year round – 93%
- Improve its activity – 92%
- Remain economically viable – 91%
- Counter price instability of products – 86.5%

### The current objectives of CAP

The large majority (88% or more) agreed that the CAP is important for the achievement of a number of important objectives, particularly those related to conservation of physical resources:

- Land management – **95%**
- Protecting the natural environment – **93.5%**

- Climate change, water management and biodiversity – **92.5%**
- Preserving the natural and cultural heritage – **92%**
- Economic viability of the agricultural sector – **89%**
- Preventing economic and social problems in rural areas – **88%**

### **The future objectives of CAP**

An overwhelming majority of respondents (85% or more) are supportive of the objectives for the future CAP related to the priorities indicated in previous replies, particularly a quality and welfare-friendly production that complements the conservation of physical resources and environmental challenge:

- Ensure the production of healthier agricultural products – **98%**
- Ensuring animal welfare – **97%**
- Encourage efficient use of water – **96.5%**
- Safeguard the future of the agricultural sector – **96%**
- Preserving the natural and cultural environment – **95%**
- Safeguard jobs and create new employment opportunities in rural areas - **94%**
- Facilitate the provision of high quality and high value added products – **93%**
- Facing the challenges poised by climate change – **93%**
- Enable the implementation of new and innovative technological practices and production processes – **93%**
- Protecting the environment and biodiversity – **92%**
- Provide a good standard of living for farmers and their families – **91%**
- Ensure the sufficient and secure supply of quality agricultural products in response to market demand – **90%**
- Encourage the use and production of alternative energy – **90%**
- Guarantee more varied agricultural products – **88%**
- Facilitate the introduction of new services related to agriculture – **86%**

### **The stakeholders' views**

#### **Main question 1 – Why do we need a European Common Agricultural Policy?**

The main view that emerged from this question was that having a common policy across the European Union did make sense as this allows the EU to achieve its strategic goals across the whole of the EU. Almost all of the stakeholders interviewed were however of the view that whilst agreeing that a common policy was beneficial, it was also very important for that same policy to allow flexibility for the specificities of the different Member States to be taken into account. This was acutely felt by almost all respondents in view of the specific and unique characteristics of the Maltese agricultural sector.

Stakeholders were asked to specify what they thought were the main strengths and weaknesses of CAP as it is today.

#### **Strengths of CAP**

- CAP is today giving more importance to the environment and to the protection of habitat;

- The CAP has managed to evolve over the years in response to the different challenges that arose over the years;
- It assists in keeping people active within the agricultural sector and thus prevents it from dying out;
- The introduction of Pillar Two;
- Thanks to CAP, farming in Malta has become more professional;
- CAP has helped guarantee sufficient food supplies of high quality at adequate prices.

### *Weaknesses of CAP*

- Is more geared towards large-scale farming and does not cater enough for the small-scale enterprises and small Member States;
- Does not invest enough funds in terms of information campaigns;
- Does not provide enough funds for investment in the agricultural infrastructure (e.g. waste facilities for farms);
- Too much bureaucracy and policy is difficult to understand and implement;
- Has not been effective in maintaining competitive prices (e.g. milk prices in Europe);
- Does not promote farming diversification enough.

### *Most important challenges facing agriculture today*

Stakeholders were asked what they thought were the most important challenges facing agriculture today. The issue of sustaining small-scale farming was probably the most recurring theme which given the set up of the Maltese agricultural sector is understandable enough. Another challenge which was quite prominently mentioned related to the need for achieving economic and environmental sustainability when it came to agriculture. Other main challenges mentioned were:

- Protection of the environment especially in relation to air emissions, soil quality, habitat and water quality;
- Climate change;
- Animal welfare;
- Adapting to changing market trends;
- A competitive agricultural sector;
- Protecting and preserving the countryside and rural areas;
- Informing and educating both the farming community and the consumer;
- Waste management.

### *The future challenges of CAP*

- Prepare the sector to deal with the effects of climate change;
- Sustain small scale farming;
- Striking the right balance between food security (and reducing food surplus) and environmental protection;
- Preventing the introduction of harmful pests through the importation of seeds and plants;
- Promote services linked to tourism such as agro-tourism;
- Making the sector more competitive and economically sustainable;
- Informing the consumer;
- Cater for the diversity of the agricultural sector found within the EU.

## **Main question 2 - What are society's objectives for agriculture in all its diversity?**

From the stakeholders point of view the consumer wants products that are safe and free from chemicals as well as being of high quality and well priced.

The majority of stakeholders felt that agriculture was not providing farmers with a fair standard of living. The reasons for this happening included the small size of our agricultural sector, the lack of proper marketing of local products and not enough income being earned by the farming community.

The general consensus amongst the stakeholders is that agriculture is playing a pivotal role when it comes to protection of the environment although a number of them pointed out that current agricultural practices are having a negative impact on the water quality. This was happening through over extraction and through excessive nitrates going into the water table.

The protection of land from development was one of the main benefits which was emphasised by almost all stakeholders. This again is a strong reflection of the situation in Malta where land is at a premium.

When it came to the contribution of agriculture to the economy, the stakeholders felt that agriculture was providing a contribution beyond that measured as a direct contribution to GDP. Agriculture was contributing by providing consumers with fresh food, enhancing the tourism product and preventing soil erosion; public goods which are highly perceived by the Maltese public.

## **Main question 3 - Why should we reform the current CAP and how can we make it meet society's expectations?**

### ***The need for reform***

All stakeholders agreed that the current CAP needs to be reformed to meet the various challenges such as protecting the environment, sustaining small scale farming, waste management, development of niches and development of ancillary services.

### ***Financial resources being allocated towards the agricultural sector***

The overriding sensation amongst stakeholders seemed to be that whilst the amount of financial resources being allocated towards the agricultural sector was substantial, the way these funds were being used perhaps needs to be substantially looked into. The areas of environment, marketing, marketability and rural development in general were identified as areas where more funding (from within the same amount of budget) could be directed; areas that are more related to Pillar 2 of the CAP.

### ***Orientating the production of quality products that meets consumer expectations***

A number of stakeholders felt that there has indeed been an improvement in the quality of agricultural products whilst others felt that not enough has been achieved.

### *Finding the right balance between agricultural practices and the protection of the environment*

The general consensus amongst stakeholders was that the CAP has managed to 'push' agriculture in the right direction in terms of sustainable farming much more progress needs to be achieved.

### *Farmers and climate change*

There were mixed replies to the question whether CAP was assisting farmers fight climate change. Whilst some felt that the current CAP is already assisting farmers fight the effects of climate change and climate change itself others felt that the CAP was contributing nothing in this regard.

## **Main question 4 - What tools do we need for tomorrow's CAP?**

### *The effectiveness of the current strands: market expenditure, direct aid and rural development*

When it came to assessing the current strands within the CAP, stakeholders agreed that the direct aids were effective.

When it comes to the marketing strand some stakeholders felt that this has worked 'relatively well' but a good number of other stakeholders expressed the opinion that this has not been at all effective.

In terms of rural development it seems that the jury is still out with very mixed opinions being expressed. Some were of the opinion that the rural development strand 'has worked well' whilst others have gone as far as describing the rural development concept as 'still a buzzword'.

### *Better targeting of support*

A greater focus on small scale farming, the provision of advisory services to the farming community, a greater provision of information and more emphasis on market development and promotion were some of the factors mentioned as possibly assisting in the better targeting of support provided by the CAP.

### *The return from farmers*

Stakeholders were asked what return should be expected from farmers in return for direct subsidies. The protection of the environment through better farming practices, the adherence to policy guidelines and EU legislation and the production of healthy and good quality food products were some of the returns expected.

### *Reasonable prices versus reasonable income*

Stakeholders were asked what could be done to ensure that consumers paid reasonable prices whilst ensuring that farmers earn a reasonable income. A better distribution of income amongst middle men and farmers, the better marketing and branding of agricultural products, the provision of farm management training and the direct support of farmers income for small scale farmers were the main elements mentioned.

### *Climate change*

A number of opinions were expressed by the stakeholders as to how CAP can assist the sector address climate change issues. The following are the main ideas and or opinions put forward:-

- Assist in the move away from monocultures (which are highly dependent on agro-chemicals that pollute surface/groundwater) to systems that promote a greater reliance on natural productivity (intercropping, agrosilviculture);
- Increasing assistance to prevent soil degradation;
- More information campaigns with farmers to show them the real impact and effects of climate change;
- Assist in better water management;
- Greater promotion of organic farming.

## The research objective

The objective of the research was to obtain the view and opinions of the general public at large and of the key stakeholders within the industry.

## Methodology

The framework for the research exercise was provided by the four research questions proposed by the European Commission to structure the general debate on the future of the CAP. The four research questions were as follows:-

1. Why do we need a European Agricultural Policy?
2. What are society's objectives for agriculture in all its diversity?
3. Why should we reform the current CAP and how can we make it meet society's expectations?
4. What tools do we need for tomorrow's CAP?

From the start it was assumed that the level of knowledge of the CAP of the general public would be limited and therefore the questions asked to the general public were close ended and tended to be somewhat generic in nature<sup>1</sup>. The more detailed and specific questions were put to the stakeholders in the qualitative research exercise and in the workshop organised. The 4 main questions listed out above were then broken down into several supplementary questions thus providing for more detail to be gathered from the main stakeholders.

The views of the sector stakeholders and the general population were gathered over a period of 6 weeks during which three initiatives were launched. These were:-

- Quantitative research using telephone surveys with the general population;
- Qualitative research using one to one semi-structured interviews with the key stakeholders in the sector;
- Half-day workshop with the key stakeholders in the sector;
- Promotion of the Commission's website on the CAP post 2013 public debate.

The following are additional details concerning the four initiatives listed above.

## Quantitative research

The quantitative research was carried out via the use of a telephone survey which took place over a period of one (1) week. The instrument used was a structured survey which was designed by the Managing Authority (MA) and Maltese National Rural Network (MNRN) personnel and the research company engaged to carry out the actual surveys.

The survey was produced in both English and Maltese [depending on the respondents' linguistic preferences]. It comprised a 'respondent profile' and one section for every 'research area' to capture and measure respondents' views and opinions towards the objectives set by the

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<sup>1</sup>This assumption was based on the findings of the Eurobarometer report dated March 2010 where only 19% were found to have heard or read about the CAP.

quantitative research project. The questionnaire was largely made up of 'closed' questions, 1-5 Likert scale questions, and one 'structured-open' question. Before commencing the fieldwork operation, the research instrument was piloted with a number of 'volunteer' survey respondents to test the flow of questions and their comprehension.

In total, 1,138 calls were conducted and 504 interviews were completed. All interviews were conducted with Maltese private households. This sample frame of the quantitative research telesurvey was distributed equally among Malta's six (6) geographical regions; broken down into three (3) distinct age categories, namely, Young Adults 18-35 yrs, Adults 36-55 yrs and Mature Adults 56+; and with an even male/female gender mix, to represent the views and opinions of the target population.

The '84-count per segment' sample frame, with 168 respondents from each age bracket, ensure a statistically-viable quantitative representation and provide research findings with a 95% confidence level at a +/-4.38% confidence interval.

The survey respondents were chosen 'at random' from GO's and Melita's Internet Telephone Directories according to their [a] Hometown and [b] Surname, this sampling procedure ensuring that all respondents, irrespective of whether their surname commences with an 'A' or 'Z', had the chance of being interviewed. Although this 'respondent' selection methodology may be discriminatory towards Maltese nationals who are either 'ex-directory' or who 'do not have a telephone at home,' this limitation does not have an impact on the significance and reliability of the research findings as one may safely assume that there is no correlation between these 'respondent types' and the research objectives of the survey.

A team of twelve (12) trained and experienced field interviewers were engaged to work on the survey project and finish their allotted quota within the indicated timeline. CATI interviews were conducted in the morning, Monday to Saturday, between 0900 hrs–1300 hrs, and during the late afternoon/evening, between 1700 hrs–2000 hrs. The object here was to capture the views of gainfully-occupied respondents [who are normally at home after working hours] and also non-gainfully-occupied respondents.

## **Qualitative research**

The qualitative research study was conducted by way of one-to-one, personal interviews conducted with the following leading stakeholders, namely:

Name of organisation	Name of representative	Nature of organisation
<b>Assoċjazzjoni Tal-Bdiewa</b>	Mr. Louie Naudi	Agricultural Association
<b>Consumer and Competition Division</b>	Dr. Mireille Vella	Government Division
<b>Din L-Art Fielwa</b>	Mr. Victor Rizzo	Heritage NGO
<b>Gozo Business Chamber</b>	Mr. Frank Xerri	Business organisation
<b>Kooperativa ta' min Irabbi I-Majjal</b>	Mr. Anthony Buhagiar	Pig breeders Coop
<b>Kooperativa Produtturi tal-Falib</b>	Mr. Gaetano Buttigieg	Dairy farmers Coop
<b>Majjistral Action Group</b>	Dr. Ian Castaldi Paris	Local Action Group
<b>Malta Resources Authority</b>	Ing. Manuel Sapiano	National Authority
<b>MCAST Agri-business Institute</b>	Ms. Silvana Camilleri	Training institute
<b>Malta Environment &amp; Planning Authority</b>	Ms. Suzanne Gauci Ms. Marie Briguglio	National Authority
<b>Malta Organic Agriculture Movement</b>	Mr. Mario Salerno	Agricultural Association
<b>Nature Trust</b>	Mr. Vince Attard	Environment NGO
<b>Ta' Qali Producers Group</b>	Mr. Peter Axisa Mr. Joseph Farrugia	Producer Group
<b>Tourism &amp; Sustainable Development Unit</b>	Ms. Marie Louise Mangion	Government Unit

The personal interviews were conducted over a period of two weeks.

A semi-structured questionnaire was used for the personal interviews which questionnaire was provided by the MA and the MNRN and was made up of a series of open-ended questions to address the four main research areas. The research instrument used was produced in both English and Maltese.

## Main conclusions that emerge from the public perception survey

The public perception survey was carried with a view to gauging the public's view of the Common Agricultural Policy (CAP) as it stands today and to obtain their view as to what the main objectives of the CAP post 2013 should be.

### Awareness of the Common Agricultural Policy (CAP)

What emerges from the public perception survey is that there is a low awareness of the CAP.

- 75% [380 respondents] of the 504 survey interviewees claimed that they have never heard of or read about the European Union's Common Agricultural and Rural Development Policy.
- 25%<sup>2</sup> [124 respondents] stated that they have: either heard or read about CAP 9.3%, or indicated that they were aware of the Policy but lacked the proper information 15.3%.

### EU financial support of the agricultural sector

The public interviewed expressed strong agreement that EU financial support of the agricultural sector is of vital importance for the continued sustainability of the agricultural sector.

- **93.5%** of total respondents agreed/ strongly agreed that the agricultural sector needs financial support from the EU to face unforeseen events such as drought, flooding, crop and animal diseases with context statement.
- **93%** of total respondents agreed/ strongly agreed that a strong, competitive and sustainable agricultural sector requires EU support.
- **93%** of total respondents agreed/ strongly agreed that EU financial support to the agricultural sector ensures the provision of agricultural products all the year round.
- **92%** of total respondents agreed/ strongly agreed that improvements in the agricultural sector's activity can be attained through EU financial assistance.
- **91%** of total respondents agree/ strongly agreed that EU financial support sustains the economical viability of the agricultural sector.
- **86.5%** of total respondents agreed/ strongly agreed that farmers need financial support from the EU to counter price instability of products.

### Views of the current objectives of the CAP

Respondents were asked to give their views as to whether they agree or disagree with the main objectives of the CAP as it stands today. The following were the main results.

#### *Land Management*

**95% (478)** of total respondents were in agreement/ strongly agreed that CAP should provide farmers with incentives to opt for the type of land management that delivers the best outcome so that the abandonment of land is avoided and the environment is taken care of.

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<sup>2</sup>This is an improved rating from that found by the Eurobarometer report dated March 2010 where only 19% were found to have heard or read about the CAP. In the same Eurobarometer report Malta ranked last in terms of awareness of the CAP.

### *Economic viability of the sector*

**89% (450)** of research survey respondents agreed/ strongly agreed that an agricultural policy that stabilises farming income is needed to ensure that agricultural production remains viable.

### *Protecting the natural environment*

**93.5% (471)** of total respondents agreed/ strongly agreed that CAP is needed to maintain an attractive countryside and to protect the natural environment.

### *Application of uniform rules*

**87% (437)** of total interviewees agreed/ strongly agreed that the application of the same rules throughout the EU results in more stable prices and the use of best agricultural practices. The relatively low figure should be read in conjunction with previous stakeholder replies on the need for the CAP to make allowance for agricultural circumstances that are very specific to a region.

### *Preserving the natural and cultural rural heritage*

**92% (466)** of research survey respondents agreed/ strongly agreed with the statement that CAP should preserve the natural and cultural rural heritage.

### *Environment, climate change, water management and biodiversity*

**92.5% (466)** of total interviewees agreed/ strongly agreed that the CAP is to address common issues relating to the environment, climate change, water management and biodiversity

### *Preventing economic and social problems in rural areas*

**88% (443)** of research survey respondents agreed/ strongly agreed with the statement that lack of support to the agricultural sector might lead to economic and social problems. The relatively low figure reflects the specific Maltese situation of high urbanisation, where rural areas are not remote.

## **Views on the objectives of the CAP post 2013**

Respondents were asked to give their views on a list of possible objectives of the CAP post 2013. The following were the main results.

### *Securing supply of quality agricultural products*

**90% (453)** of the total 504 research survey interviewees indicated that it is important/very important that CAP must ensure the sufficient and secure supply of quality agricultural products in response to what the market demands.

### *Guarantee more varied agricultural products*

The guarantee for more varied agricultural products is considered by **88% (442)** of the total 504 research survey interviewees as an important/ very important issue to be addressed by CAP

### *Ensure the production of healthier agricultural products*

**98% (496)** of the total 504 research survey interviewees feel that the tackling of issue by CAP to ensure the production of healthier agricultural product is important/ very important.

### *Facilitate the introduction of new services related to agriculture*

The facilitation by CAP for the introduction of new services in the agricultural sector is deemed by **86% (435)** of the total 504 research survey interviewees as an important/ very important issue.

### ***Enable the implementation of new and innovative technological practices and production processes***

**93%** (471) of the total 504 research survey interviewees perceive the tackling of the issue in context as important/ very important.

### ***Facilitate the provision of high quality and high value added products***

**93%** (468) of the total respondents feel that assistance by CAP to the agro-food sector towards the exploitation of better opportunities is deemed as an important/ very important

### ***Protecting the environment and biodiversity***

**92%** (466) of the total 504 research survey interviewees perceive the tackling of issue by CAP, to ensure that farming practices which take care of the environment and biodiversity are used by the agricultural sector, as important/ very important.

### ***Ensuring animal welfare***

Tackling the issue to ensure the welfare of farm animals is considered by **97%** (491) as an important/ very important issue to be addressed by CAP.

### ***Preserving the natural and cultural environment***

**95%** (480), of the total 504 research survey interviewees, feel that the preservation of the natural and cultural environment by CAP is important/ very important.

### ***Provide a good standard of living for farmers and their families***

The provision of a good standard of living for farmers and their families by CAP is deemed by **91%** (457) as an important/ very important issue.

### ***Facing the challenges poised by climate change***

**93%** (470) of the total 504 research survey interviewees perceive that assistance from CAP in tackling the issues of climate change as important/ very important.

### ***Encourage efficient use of water***

Encouraging farmers to use water efficiently is deemed as an important/ very important issue to be tackled by CAP by **96.5%** (486) of the total 504 research survey interviewees

### ***Encourage the use and production of alternative energy***

**90%** (455) expressed that it is important/ very important that CAP encourages farmers to make use of and contribute to the production of alternative energy.

### ***Safeguard the future of the Maltese agricultural sector***

**96%** (486), of the total 504 research survey interviewees, are of the opinion that it is important/ very important that CAP safeguards the future of the Maltese agricultural sector.

### ***Safeguard jobs and create new employment opportunities in rural areas***

Tackling the issue related to the retention of existing jobs and the creation of new employment in the rural sector is considered by **94%** (475) of the total 504 research survey interviewees as an important/ very important issue to be addressed by CAP.

## **Main conclusions that emerge from the one to one interviews with main stakeholders**

The interviews with the main stakeholders were structured according to the four main questions put forward by the Commission. Each of the four main questions was supplemented with more detailed and focused questions which have been fielded with the aim of providing a more holistic reply to each of the four main questions.

### **Main question 1 – Why do we need a European Common Agricultural Policy?**

#### **Supplement question 1.1 - Does a common policy across Europe make sense in a Europe with a diversified agricultural sector?**

The main view that emerged from this question was that having a common policy across the European Union did make sense as this allows the EU to achieve its strategic goals across the whole of the EU. Almost all of the stakeholders interviewed were however of the view that whilst agreeing that a common policy was beneficial, it was also very important that the policy allows for flexibility in order to address the specificities of the different Member States to be taken into account. This was acutely felt by almost all respondents in view of the specific and unique characteristics of the Maltese agricultural sector.

#### **Supplement question 1.2 - Should the EU continue to give financial contribution to agriculture? Why? In what areas?**

There was almost unanimous agreement that the EU should continue to give financial support to the agricultural sector. The reasons for the provision of such support were varied and can be listed as follows:-

- To sustain small sized farming;
- to encourage and particularly to kick start diversification away from harmful practices;
- to improve productive systems;
- to improve quality of products;
- to improve animal welfare and animal health;
- to produce those products that are required;
- to diversify the range of products produced;
- preservation of the country side;
- preservation of traditional farming methods;
- to maintain price stability;
- to promote organic farming;
- to promote agri-biodynamics;
- to promote product traceability.

#### **Supplement question 1.3 - What are the strengths and weaknesses of the CAP?**

The following were the main strengths identified by the stakeholders:-

Strengths

- The CAP has managed to evolve over the years in response to the different challenges that arose over the years;
- CAP is today giving more importance to the environment and to the protection of habitat;
- CAP has helped guarantee sufficient food supplies of high quality at adequate prices;
- Thanks to CAP, farming has become more professional;
- It assists in keeping people active within the agricultural sector and thus prevents it from dying out;
- The introduction of Pillar Two.

The following were the main weaknesses identified by the stakeholders:

#### Weaknesses

- Too much bureaucracy and policy is difficult to understand and implement;
- Has not been effective in maintain competitive prices (e.g. Milk prices in Europe);
- Is more geared towards large-scale farming and does not cater enough for the small states;
- Does not invest enough funds in terms of information campaigns;
- Does not provide enough funds for investment in the agricultural infrastructure (e.g. waste facilities for farms);
- Does not promote farming diversification enough.

#### **Supplement question 1.4 - What do you think are the most important challenges facing agriculture today?**

The challenges facing agriculture today as identified by the stakeholders can be categorized as follows:-

- Protection of the environment especially in relation to air emissions, soil quality, habitat and water quality;
- Climate change;
- Animal welfare;
- Adapting to changing market trends;
- Sustainable agriculture both economically and environmentally;
- Sustaining small scale farming;
- A competitive agricultural sector;
- Protecting and preserving the countryside and rural areas;
- Informing and educating both the farming community and the consumer;
- Waste management.

#### **Supplement question 1.5 - Has the CAP delivered the required results in facing up to these challenges?**

In responding to this question the stakeholders provided a mixed response. A number of the stakeholders felt that the CAP is doing well in meeting the challenges of:

- Protection of the environment;
- Animal welfare;

- Adapting to changing trends<sup>3</sup>;
- Waste management.

On the other hand the stakeholders felt that the CAP was not being effective enough in meeting the following challenges:

- Climate change;
- Economic sustainability of agriculture;
- Sustaining small scale farming<sup>4</sup>;
- A competitive agricultural sector;
- Protecting and preserving the countryside and rural areas;
- Informing and educating both the farming community and the consumer.

### Supplement question 1.6 - What are the future challenges of agriculture and how they can be better targeted through CAP and rural development policy?

In responding to this question the stakeholders identified most of the current challenges as also being challenges of the future. The challenges identified can be listed as follows:-

Challenge	How to target through future CAP
<b>Striking the right balance between food security (and reducing food surplus) and environmental protection</b>	Better promotion of organic farming practices and other forms of certified agriculture
<b>Preventing the introduction of harmful pests through the importation of seeds and plants</b>	Tighter import controls of seeds and plants from outside the EU
<b>Promote services linked to tourism such as agro-tourism</b>	Provide incentives for the development of such services
<b>Prepare the sector to deal with the effects of climate change</b>	Prepare guidelines for future policy to address the effects of climate change
<b>Making the sector more competitive and economically sustainable</b>	Assisting the farming community to develop more niche markets
<b>Sustain small scale farming</b>	Provide measures of assistance specifically structured to help small scale farmers
<b>Informing the consumer</b>	Carry out information campaigns re quality of food products
<b>Cater for the diversity of the agricultural sector found within the EU</b>	Greater flexibility in how Member States implement the CAP in their respective countries.

<sup>3</sup>It was however felt that the Maltese agricultural sector had not adapted enough.

<sup>4</sup>Sustaining small scale farming and economic sustainability of agriculture are very closely linked in Malta due to the small scale farming that takes place in Malta.

## **Main question 2 - What are society's objectives for agriculture in all its diversity?**

### **Supplement question 2.1 - What are the expectations of EU citizens/consumers from agriculture in your opinion? Do you think that agriculture in Europe has met these expectations?**

From the stakeholders point of view the consumer wants products that are:

- Fresh;
- Safe and free of chemicals;
- Of high quality;
- Well priced;
- Produced through environmentally sustainable methods and respecting animal welfare.

In conjunction with these replies a number of stakeholders raised the issue of information and education. The need for proper labelling and the need for providing consumers with educational material concerning the 'from farm to fork' concept were the two main initiatives mentioned.

### **Supplement question 2.2 - Has agriculture provided consumers with high quality food at reasonable prices?**

In responding to this question the stakeholders gave a mixed reply. Whilst there is general consensus that agriculture is providing the consumer with high quality food items there are mixed feelings as to whether this is being done at reasonable prices. Some feel that this has not been achieved whilst others expressed the opinion that more could be done to achieve this target.

### **Supplement question 2.3 - Has agriculture provided farmers with a fair standard of living?**

The majority of stakeholders felt that agriculture was not providing farmers with a fair standard of living. The reasons for this happening were listed as follows:-

- The small size of our agriculture;
- Prices paid to farmers are too low;
- Most of the profits are taken by middle men and retailers;
- Lack of proper marketing of the produce;
- Too much competition from non-Maltese products.

Two of the stakeholders interviewed did however say that agriculture is providing farmers with a fair standard of living. This was mainly due to the development of agriculture which is now offering people in agriculture diverse opportunities and to good organisation which allows operators to take advantage of market opportunities.

### **Supplement question 2.4 - Is agriculture playing a pivotal role in protecting our environment (land management, water quality, soil erosion and biodiversity)?**

The general consensus amongst the stakeholders is that agriculture is playing a pivotal role when it comes to protection of the environment although a number of them pointed out that the current agricultural practices are having a negative impact on the water quality. This was happening through over extraction and through excessive nitrates going into the water table.

The protection of land from development was one of the main benefits which was emphasised by almost all stakeholders.

### **Supplement question 2.5 - Do you believe that the agricultural sector could contribute to the economy?**

In responding to this question practically all stakeholders agreed that the contribution of agriculture in terms of direct contribution to the economy is very low. All stakeholders however emphasised that agriculture has a much wider and more important role to play in that it provides the following benefits:-

- Protects our landscape from development;
- Provides consumers with fresh food;
- Enhances the tourism product;
- Prevents soil erosion.

### **Supplement question 2.6 - What type of agriculture do we want to leave our children?**

In replying to this question the stakeholders identified the following elements as being desirable in the type of agriculture that would be inherited by our children:-

- Still using traditional methods whilst becoming more efficient<sup>5</sup>;
- Using methods which respect and protect the environment;
- Provides food security and quality;
- A more Organic type of agriculture;
- Capable of offering a good standard of living to farmers.

## **Main question 3 - Why should we reform the current CAP and how can we make it meet society's expectations?**

### **Supplement question 3.1 - Do you think there is a need for the CAP to be reformed? If yes, in which areas do you feel that this change is required?**

All stakeholders agreed that the current CAP needs to be reformed to meet the various challenges highlighted in previous sections such as protecting the environment, sustaining small scale farming, waste management, development of niches and development of ancillary services.

### **Supplement question 3.2 - Do you think that financial assistance under the CAP is meeting core objectives such as sustainability (environmental, social and economic) and better quality of life?**

The general feeling amongst stakeholders was that CAP was meeting its core objectives however it was generally agreed that much more needed to be done especially when it comes to quality of life.<sup>6</sup>

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<sup>5</sup>This was the most common factor mentioned.

<sup>6</sup>Clearly in saying this one must keep in mind the generally negative reply given in response to question 2.3 concerning farmers standard of living.

**Supplement question 3.3 - Do you think that enough financial resources are being allocated towards the EU agricultural sector? If budget should be reduced, in which areas should such a reduction take place? If the budget is to be increased, in which areas should such an increase take place? (i.e. is current budget allocation to direct aid and rural development balanced?)**

The overriding sensation amongst stakeholders seemed to be that whilst the amount of financial resources being allocated towards the agricultural sector was substantial, the way these funds were being allocated perhaps needs to be substantially looked into. According to some stakeholders some of the end results being obtained were questionable and therefore a better allocation of resources could probably take place. The areas of environment, marketing, marketability and rural development in general were identified as areas where more funding from within the agricultural budget could be directed.

**Supplement question 3.4 - Has CAP been successful in orientating the production of quality products that meets consumer expectations?**

The replies given by stakeholders to this question by and large reflected replies already given above. A number of stakeholders felt that there has indeed been an improvement in the quality of agricultural products whilst others felt that not enough has been achieved.

**Supplement question 3.5 - Has the CAP managed to find the right balance between agricultural practices and the protection of the environment via sustainable farming practices?**

The general consensus amongst stakeholders that replied to this question was that the CAP has managed to 'push' agriculture in the right direction in terms of sustainable farming although much more progress needs to be achieved.

**Supplement question 3.6 - How can the CAP help ensure that the natural environment is protected and preserved?**

A number of replies given were again reflective of previous replies. The general consensus was that environment protection must be at the core of the CAP and that all measures and instruments must be designed with environment protection in mind. The need for greater flexibility allowing country specific solutions was again mentioned.

**Supplement question 3.7 - Is CAP contributing in assisting farmers fight climate change? If yes, how?**

There were mixed replies to this question. Whilst some felt that the current CAP is already assisting farmers fight the effects of climate change and climate change itself others felt that the CAP was contributing nothing in this regard.

Those that said that CAP was already assisting identified the following ways and means how CAP is achieving this:-

- By making farmers aware of what is climate change and how they can minimize their contribution towards it,
- By providing funding for important infrastructure such as reservoirs, means of alternative energy etc.

## **Main question 4 - What tools do we need for tomorrow's CAP?**

### **Supplement question 4.1 - The existing Common Agricultural Policy provides a package of measures and policies divided into three main types; market expenditure, direct aids and rural development. Which strand do you believe has worked well and which strand do you believe has worked poorly?**

This question produced a mixture of responses especially when it comes to assessing the effectiveness of the Rural Development strand.

Stakeholders that replied to this question in the main agreed that the direct aids were effective.

When it comes to the marketing strand some stakeholders felt that this has worked 'relatively well' but a good number of other stakeholders expressed the opinion that this has not been at all effective. Phrases such as 'failed miserably', 'not used well' and 'not worked at all' were used to express this opinion.

In terms of rural development it seems that the jury is still out with very mixed opinions being expressed. Some were of the opinion that the rural development strand 'has worked well' whilst others have gone as far as describing the rural development concept as 'still a buzzword'. Others have expressed the opinion that whilst good progress has been registered more needs to be done to achieve sustainable rural development.

### **Supplement question 4.2 - How can support be better targeted to bring about the most efficient allocation of resources?**

In responding to this question, the stakeholders mentioned a number of elements which have already been covered in previous replies. Essentially the following were mentioned as factors which could help target support in a more efficient manner:

- Greater focus on small scale farming;
- Provision of advisory services to the farming community;
- Greater provision of information;
- More emphasis on market development and promotion;
- Direct income support.

### **Supplement question 4.3 - What improvements to the current policy can ameliorate stability of agricultural incomes?**

The stakeholders that replied to this question put forward the following views:-

- More emphasis should be given to small scale farming;
- Each sector in each country should first assess its own viability first;
- An analysis should be made as to who and where the major mark-ups along the food chain are being made especially in view of the prices being paid by consumers;
- Third country imports should be regulated in a much tighter fashion;
- More resources should be used for marketing of products;
- Greater emphasis should be placed on training and education;
- Member States should be given greater flexibility in the implementation of CAP.

#### **Supplement question 4.4 - What form of direct aid should be available to farmers?**

The stakeholders that replied to this question put forward the following views:-

- Direct aid should be tied to the specific requirements of each Member State;
- Direct aid programmes should be country and sector specific based on the viability of each sector;
- Direct aid should be targeted at environmental projects such as waste recycling;
- Direct aid should go towards marketing of products;
- Direct aid should help farmers meet the various EU requirements and to be able to engage in more environmentally friendly practices.

The last three replies indicated above on direct aid show that there is a general lack of knowledge on how direct aid operates, possibly due to the low proportion of pillar 1 support available in Malta compared to pillar 2.

#### **Supplement question 4.5 - If direct subsidies are to be given, what is expected in return from our farmers?**

A number of replies were given by stakeholders responding to this question. The main elements mentioned can be grouped as follows:-

- Protection of the environment through better farming practices;
- Adherence to policy guidelines and EU legislation;
- Viable and sustainable sectors;
- Healthy, good quality food products.

#### **Supplement question 4.6 - How can this policy address market fluctuations (both price and production)?**

In replying to this question the stakeholders repeated a number of elements which have already been mentioned in previous sections of the report. Some of the main elements mentioned related to the focusing of assistance on products required by the market, the promotion of agricultural products and the work put in by farmers to produce such products, the focusing of assistance on small scale farming and the provision of flexibility for Member States to implement the CAP according to their particular circumstances.

#### **Supplement question 4.7- What can be done so that consumers pay a reasonable price, and farmers earn a reasonable income?**

In responding to this question the stakeholders again repeated a number of elements which have already been mentioned before with one or two additions such as the creation of a farmers market and the paying of compensation to farmers for adopting environmentally friendly practices. Other elements mentioned were the need for better marketing and branding of agricultural products, the provision of farm management training and the direct support of farmers income especially for small scale farmers.

#### **Supplement question 4.8 - How can CAP help the agricultural sector address issues related to climate change?**

A number of opinions were expressed by the stakeholders as to how CAP can assist the sector address climate change issues. The following are the main ideas and or opinions put forward:-

- Assist in the move away from monocultures (which are highly dependent on agro-chemicals that pollute surface/groundwater) to systems that promote a greater reliance on natural productivity (intercropping, agrosilviculture);
- Increasing assistance to prevent soil degradation;
- More information campaigns with farmers to show them the real impact and effects of climate change;
- Assist in better water management;
- Greater promotion of organic farming.

**Supplement question 4.9 - How can the CAP address issues related to standards of goods imported from non-EU Member States? What is your opinion and how do you suggest to address this issue?**

In replying to this question the stakeholders put forward a number of views with the need to promote high standards of food products being the main one. Other suggestions put forward can be listed as follows:-

- Implementation of more stringent controls vis-à-vis pests, quality and seed varieties;
- Better labelling of EU products so that consumers will know what they are getting from EU products vis-à-vis non EU products.

## Main conclusions that emerge from the public consultation seminar

The Ministry for Resources and Rural Affairs (MRRRA) through the MNRN organised a public consultation seminar that took place over half a day. The seminar was well attended by the main stakeholders involved in the agricultural sector including cooperatives, associations, policy makers and LAGs.

The consultation seminar was structured along the four main questions posed by the Commission concerning the future of the CAP. The first half of the session consisted of presentations by the MA and the MNRN re the Common Agricultural Policy and the future of the EU rural development policy as a general introduction to the meeting. These presentations were then followed up by two workshops:

- **Workshop A** which discussed the following questions:
  - *What are the challenges that agriculture and the rural areas are currently facing?*
  - *How can all these challenges be addressed in a Common Agricultural Policy?*
  - *What measures should be included in a future Rural Development Programme?*
- **Workshop B** which discussed the following questions:
  - *What is the importance of Rural Development for the future CAP and for other policies of the EU?*
  - *From the experience gained so far, do you think that the Measures are effectively addressing the priorities identified by the EU?*

The following are the main conclusions that emerged from the two workshops:

### Workshop A:

#### What are the challenges that agriculture and the rural areas are currently facing?

A number of issues were raised by the stakeholders participating in this workshop. The challenges mentioned reflect most of the replies given in the One to One interviews. The challenges that were identified during the discussion that took place in this workshop can be listed as follows:-

- The provision of on-going education to the farming community;
- Proper waste management including investment in the required facilities;
- The need for more time and assistance to be able to comply with all EU legislative requirements;
- The need for increased marketing of agricultural products;
- Promotion of organic farming and the further strengthening of good farming practices;
- Ensuring that the farmer gets a good return on his/her products;
- Managing the ever increasing costs of production.

#### How can all these challenges be addressed in a Common Agricultural Policy?

The next question that followed was how the CAP could be adopted to effectively meet the challenges ahead. Most of the stakeholders felt that the current CAP was already tackling in one way or another most of the challenges highlighted however some suggestions of a somewhat generic nature were put forward. In essence these could be listed as follows:-

- The Rural Development Plan for the period 2014-2020 needed to have more and more flexibility to cater for the needs of the local agricultural sector;
- More assistance needed to be given to exporting local agricultural products;
- More involvement of the sector in the policy making thus ensuring a greater relevance of such policies.

### **What measures should be included in a future Rural Development Programme?**

The third and final question of the workshop related to the future measures that needed to be included in the next Rural Development Programme. The participating stakeholders mentioned the need for flexibility and the need for measures to be designed in a way that makes them relevant for Maltese agriculture. Some expressed the opinion that the next RDP should focus more on investments although others were of the opinion that the provision of information on important issues such as cross compliance and market promotion was also very important.

## **Workshop B:**

### **What is the importance of Rural Development for the future CAP and for other policies of the EU?**

The increased importance of Rural Development in the CAP was identified as an important development for Malta given the small scale nature of the country's agriculture. It was also agreed that the EU needed to find the right balance between food production and the protection of the environment and therefore the path towards more sustainable rural development was the correct path forward. Furthermore it was also pointed out that whilst the EU was presenting a common policy (i.e. the CAP) it was important that enough flexibility was retained so that the different characteristics of the different EU regions could still be catered for. It was pointed out that there is a considerable difference between agriculture in the Northern parts of Europe and that in the Southern parts of Europe. Rural development was also highlighted as being important for the EU environment policy as well as for the creation of employment opportunities.

### **From the experience gained so far, do you think that the Measures are effectively addressing the priorities identified by the EU?**

The participating stakeholders agreed that it was still early days for one to be able to pass a judgement as to whether the current Measures are effectively addressing the priorities identified by the EU. This was due to the fact that it was only over the last year that most Measures had been launched and therefore it was still too early to talk about impact. It was however remarked that in view of the diversity of agriculture in the EU greater flexibility in how the Measures are implemented would have been more beneficial.

When asked to consider whether the nature of the Measures (i.e. the areas they were addressing) was relevant to the challenges faced by agriculture today it was felt that generally speaking they did address the major challenges of:-

- Sustainability;
- Food quality and health;
- Security of supply;

- Product diversification;
- Protection of the environment.

On the other hand it was felt that not enough was being done to meet the following challenges:-

- Providing farmers with sufficient income;
- Meeting the cost of energy and investing in alternative energy;
- Sustainable management of water;
- Promotion of local products;
- Reducing the effects of agriculture on climate change.

### **Promotion of the Commission's website on the CAP post 2013 public debate**

The MRRA has also taken the initiative to promote the consultation webpage that the EU Commission has launched purposely to facilitate contributions of EU citizens for this public debate. This promotion was mainly carried out through a press release that was published on the MRRA website including an article on the consultation meeting that was organised by the MNRN and the MA and provided also the link to the Commission's website. Furthermore, during the consultation meeting organised by the MNRN, the website address was provided to all the attendees.

The website address was also forwarded to rural stakeholders by e-mail.

## Appendix A – Quantitative research survey report

### INTRODUCTION

The Managing Authority and the Maltese National Rural Network, within the Ministry of Resources and Rural Affairs, commissioned M. FSADNI & Associates (MF&A) to conduct a ‘quantitative’ Research Study to assess the views, perceptions and attitudes of the Maltese general public (private households) on the future of the Common Agricultural Policy in Malta.

### RESEARCH OBJECTIVES

This Research Project was conducted with private Households in Malta and Gozo to explore the following research areas:

- Respondents’ awareness of the European Union’s Common Agricultural and Rural Development Policy, the CAP.
- Respondents’ level of concordance with statements relating to CAP.
- Respondents’ views on the level of importance of issues to be addressed by CAP.
- Respondents’ rating of responsibilities shouldered by the Common Agricultural Policy.
- Suggestions and recommendations on improvements in the agricultural sector in Malta.

### THE RESEARCH PLAN - RESEARCH METHODOLOGY

In reaching the objectives and requirements set out above, the following research methodology was adopted:

- A quantitative research survey was conducted with private households in Malta and Gozo by way of CATI [computer-assisted telephone interviews].
- A research instrument (structured CATI questionnaire) was specifically designed to address the data requirements of the quantitative teleresearch study. It comprised a series of items that capture and measure the respondents’ views and opinions towards the objective of the research study.
- The field work was conducted between 4 – 10 May 2010.
- 504 completed interviews were conducted with Maltese households. This sample frame of the quantitative research telesurvey was distributed equally among Malta’s six [6] geographical regions; broken down into 3 distinct age categories, namely, Young Adults 18-35 yrs, Adults 36-55 yrs and Mature Adults 56+; and with an even male/female gender mix, to represent the views and opinions of the target population. This sample frame ensures a statistically-viable quantitative representation and provides research findings with a 95% confidence level at a +/-5% confidence interval.

## RESEARCH FINDINGS

### RESPONDENT PROFILE

In order to draw up a profile of the Survey Respondents, first it was established if the Interviewee was involved in the agricultural sector. In cases where an affirmative response was indicated, the Interviewer was instructed to close the Interview.

#### Salient Research Findings

##### *The Geo Region of Respondent*

- The 504-count sample frame was distributed equally among Malta's six official geographical regions, Gozo included, with the Research Questionnaire being conducted with 84 respondents from each respective region.

##### *The Age Bracket that Respondent falls in*

- Respondents were all 18 years of age and over, with 33.3% (168), of the total 504 interviewees, making up each of the 3 distinct age categories adopted namely, Young Adults 18-35 yrs, Adults 36-55 yrs and Mature Adults 56+.

##### *The Gender of Respondent*

- An even male/ female gender mix was attained during the CATI fieldwork with 241 male respondents (48%) and 263 females (52%) accepting to share their views and perceptions on the future of the Common Agricultural Policy in Malta.
- The 241 male respondent representation was mainly made up of: 36% (87) 18-35 Young Adults, 34% (81) 56+ Mature Adults, and 30% (73) 36-55 Male Adults.
- Contrastingly, the representation of 263 female respondents was made up in the main by 36% (95) 36-55 Adults, 33% (87) 56+ Mature Adults, and 31% (81) were 18-35 Young Female Adults.

##### *The Level of Education of Respondent*

- 43% of participants in the research survey, (216 respondents), hold a secondary level of education. These fall in the following age brackets accordingly: 57% (96) of the 168 respondents making up the Adults age category of 36-55 years, and 36% (60) of those in the Young Adults 18-35 years and Mature Adults 56+ respectively.
- 17% (85) of total respondents are in possession of post-secondary education with 25% (42) of the 168 respondents in the 18-35 age bracket, 19% (32) of those in the 36-55 brackets, and 6.5% (11) of respondents in the 56+ age category stating that they have a post-secondary level of education.

- 17% (84 respondents) have followed studies at tertiary level with 34% (57) of the 168 respondents in the 18-35 age bracket, 12% (20) of those in the 36-55 age category, and 4% (7) of 56+ respondents, indicating that they have received a tertiary level of education.
- A further 3% (17 respondents) indicated that they have followed post-tertiary studies, with 5% (9) of the 168 respondents in the Young Adults category, and 2% (4 respondents) in each of Adults and Mature Adults categories stating that they possess this level of education.
- 18% (92 respondents), of the total of 504 participants, have received education up to Primary level with 45% (76), of the 168 Mature Adults respondents and 9.5% (16) of those falling in the Adults category, indicating that they have a primary level of education.
- 2% (10 respondents) indicated that they have not received any formal education but know how to read and write, or are illiterate. These respondents all fall in the 56+ age bracket category.

## **THE COMMON AGRICULTURAL POLICY - CAP**

The following research areas were addressed when assessing public perception on the future of a common agricultural policy in Malta:

[a]. Respondents' awareness of the European Union's Common Agricultural and Rural Development Policy, the CAP.

[b]. Respondents' level of concordance with statements relating to CAP.

[c]. Respondents' views on the level of importance of issues to be addressed by CAP.

[d]. Respondents' rating of responsibilities shouldered by the Common Agricultural Policy.

[e]. Suggestions and recommendations on improvements in the agricultural sector in Malta.

## **RESPONDENTS' AWARENESS OF CAP**

This Section researched Survey Respondents' awareness of the European Union's Common Agricultural and Rural Development Policy, CAP. The Interviewee was given a brief explanation of the objectives and responsibilities of the Policy in the circumstance that he/she responded not to have ever heard or read about the CAP, or indicated that he/she has heard about CAP but lacked information.

### **Salient Research Findings**

#### ***Respondents' awareness of CAP – [Q7]***

- 75% (380), of the total 504 respondents, claimed that they have never heard of or read about the European Union's Common Agricultural and Rural Development Policy. This lack

of awareness was registered amongst 71% and over of respondents in the 18-35 Young Adults and 56+ Mature Adults age categories respectively. This percentage increases to 82% of respondents in the 36-55 Adults age category who also gave a negative response.

- 25% (124) positively stated that they have: either heard or read about CAP 9.3% (47 respondents), or indicated that they were aware of the Policy but lacked the proper information 15.3% (77 respondents).
- The 47 respondents who indicated that they were informed about the objectives and responsibilities of the Policy were mainly Mature Adults, 11% (19) of the 168 respondents making up this age category, followed by 9.5% (16) of Young Adults respondents, and 7% (12) of those falling in the Adults age category.
- On the other hand, the 77 respondents who expressed that they have heard or read about CAP but do not really know what it is about were mainly 18-35 Young Adults and 56+ Mature Adults, with 17%+ of respondents in both age categories giving this indication. 11% (18) of respondents in the 36-55 Adults age category also indicated that they lacked information.

## **RESPONDENTS' LEVEL OF CONCORDANCE WITH STATEMENTS RELATING TO CAP**

This Section analyses the personal judgement of Survey Respondents' about a number of statements relating to a European Union Common Agricultural Policy, CAP. More specifically, Interviewees indicated their agreement/ disagreement with the following research areas:

The agricultural sector needs Financial Support from the EU:

- [a]. to remain economically viable.
- [b]. to ensure the provision of agricultural products all the year round.
- [c]. to help them improve their agricultural activity.
- [d]. to counter price instability of products.
- [e]. to face unforeseen events such as drought, flooding, crop and animal diseases.
- [f]. to remain strong, competitive and sustainable.

The Common Agricultural Policy:

- [a]. should incentivise farmers towards better land management.
- [b]. is needed as agricultural production is not always economically viable.
- [c]. is needed to maintain an attractive countryside and protect the natural environment.

[d]. ensures that the same rules are applied throughout the EU.

[e]. should preserve the natural and cultural rural heritage.

[f]. is to address common issues relating to the environment, climate change, water management and biodiversity.

[g]. is to provide support to the agricultural sector, lack of which might lead to economic and social problems.

## Salient Research Findings

### Respondents' Level of Concordance with the EU Financial Support to the Agricultural Sector

#### *The agricultural sector needs Financial Support from the EU to remain economically viable.*

- 91% (458) of total respondents agreed/ strongly agreed that EU financial support sustains the economical viability of the agricultural sector. This perception was registered amongst 94% (158) of 18-35 Young Adults, followed by 90.5% (152) of 56+ Mature Adults, and 88% (148) of 36-55 Adults age categories.
- 6% (31) of interviewees, the majority of whom (16) falling in the 36-55 yrs age brackets neither agreed nor disagreed with the statement in question.
- 2% (12) of total respondents were in disagreement or/ in strong disagreement, with an equal number of respondents per age bracket sharing this perception.
- 3 respondents held no personal view on the statement.

#### *The agricultural sector needs Financial Support from the EU to ensure the provision of agricultural products all the year round.*

- 93% (467) of research survey respondents agreed/ strongly agreed that EU financial support to the agricultural sector ensures the provision of agricultural products all the year round, with 95% (159) of 56+ Mature Adults, and 92% (154) of respondents whose age falls within the other two age brackets, passing this judgement.
- 5% (25) of interviewees, evenly distributed amongst the three age brackets, neither agreed nor disagreed with the statement in question.
- 2% (11) of total respondents, mainly from the Young Adults and Adults age categories, were in disagreement or/ in strong disagreement with the statement.
- One interviewee indicated that he did not know how to express his judgement.

***The agricultural sector needs Financial Support from the EU to help them improve their agricultural activity.***

- 92% (465) of total respondents agreed/ strongly agreed that improvements in the agricultural sector's activity can be attained through EU financial assistance. This perception was registered amongst 95% (160) of 56+ Mature Adults, followed closely by 93% (156) of 36-55 Adults, and 89% (149) of 18-35 Young Adults age categories.
- 6% (30) of interviewees, half of whom (15) falling in the 18-35 yrs age brackets neither agreed nor disagreed with the statement in question.
- 2% (9) of total respondents, mainly from the Young Adults and Adults age categories, were in disagreement or/ in strong disagreement with the statement.

***The agricultural sector needs Financial Support from the EU to counter price instability of products.***

- 86.5% (436) of total interviewees agreed/ strongly agreed that farmers need financial support from the EU to counter price instability of products with 85% to 88% of respondents in each age category standing in agreement.
- 8% (41) of interviewees, evenly distributed amongst the three age brackets, neither agreed nor disagreed with the statement in question.
- 5% (25) of total respondents, mainly from the Young Adults and Adults age categories, shared a negative perception.
- 2 respondents held no personal view on the statement.

***The agricultural sector needs Financial Support from the EU to face unforeseen events such as drought, flooding, crop and animal diseases.***

- 93.5% (471) of total respondents agreed/ strongly agreed with context statement, with 96% (161) of Adults, followed by 94% (158) of Mature Adults, and 90.5% (152) of Young Adults passing this judgement.
- 5% (27) of interviewees, half of whom (13) falling in the Young Adult age bracket neither agreed nor disagreed with the statement in question.
- 1% (6) of total respondents, half of whom being Young Adults, were in disagreement or/ in strong disagreement with this statement.

***The agricultural sector needs Financial Support from the EU to remain strong, competitive and sustainable.***

- 93% (469) of research survey respondents agreed/ strongly agreed that a strong, competitive and sustainable agricultural sector requires EU support with 90% (151) of Adults, and 95% (159) of respondents whose age falls within the other two age brackets, passing this judgement.
- 4% (21) of interviewees, evenly distributed amongst the three age brackets, neither agreed nor disagreed with the statement in question.
- 2% (8) of total respondents, mainly from the Adults age category, were in disagreement or/ in strong disagreement with the statement.
- Six interviewees indicated that they did not know how to express their judgement.

**Respondents' Level of Concordance with the Objectives of the Common Agricultural Policy**

***The Common Agricultural Policy should incentivise farmers towards better land management.***

- 95% (478) of total respondents were in agreement/ strongly agreed that CAP should provide farmers with incentives to opt for the type of land management that delivers the best outcome so that the abandonment of land is avoided and the environment is taken care of. 95% of respondents in each of the different age bracket categories held this perception.
- 5% (23) of interviewees, evenly distributed amongst the three age brackets, neither agreed nor disagreed with the statement in question.
- 1% (3) of Young Adults and Adults, were in disagreement or/ in strong disagreement with the statement.

***The Common Agricultural Policy is needed as agricultural production is not always economically viable.***

- 89% (450) of research survey respondents agreed/ strongly agreed with the context statement, with 92% (154) of Young Adults, closely followed by 89% (150) of Mature Adults, and 87% (146) of Adults, passing this judgement.
- 6% (32) of interviewees, half of whom were Adults (15), neither agreed nor disagreed with the statement in question.

- 2% (11) of total respondents, evenly distributed amongst the three age brackets, were in disagreement or/ in strong disagreement with the statement that CAP is needed as agricultural production is not always economically viable.
- 11 respondents held no personal view on the statement.

***The Common Agricultural Policy is needed to maintain an attractive countryside and protect the natural environment.***

- 93.5% (471) of total respondents agreed/ strongly agreed that CAP is needed to maintain an attractive countryside and to protect the natural environment. This perception was registered amongst 97% (163) of 56+ Mature Adults, followed by 94% (158) of 36-55 Adults, and 89% (150) of 18-35 Young Adults age categories.
- 5% (26) of interviewees, the majority of whom (17) falling in the 18-35 yrs age brackets, neither agreed nor disagreed with the statement in question.
- 1% (6) of total respondents, evenly distributed amongst the three age brackets, were in disagreement or/ in strong disagreement with the statement.
- One interviewee indicated that he did not know how to express his judgement.

***The Common Agricultural Policy ensures that the same rules are applied throughout the EU.***

- 87% (437) of total interviewees agreed/ strongly agreed that the application of the same rules throughout the EU results in more stable prices and the use of best agricultural practices, with 88% of Young and Mature Adults, and 84.5% of Adults, standing in agreement.
- 8.5% (43) of interviewees, evenly distributed amongst the three age brackets, neither agreed nor disagreed with the statement in question.
- 4% (18) of total respondents, half of whom being Adults (9), shared a negative perception.
- 6 respondents held no personal view on the statement.

***The Common Agricultural Policy should preserve the natural and cultural rural heritage.***

- 92% (466) of research survey respondents agreed/ strongly agreed with the statement that CAP should preserve the natural and cultural rural heritage, with 95% (159) of Young Adults, closely followed by 92% (154) of Adults, and 91% (153) of Mature Adults, passing this judgement.

- 6% (30) of interviewees, evenly distributed amongst the three age brackets, neither agreed nor disagreed with the statement in question.
- 1% (5) of total respondents, mostly Adults (3), were in disagreement or/ in strong disagreement with the statement regarding the preservation of the natural and cultural rural heritage.
- 3 respondents held no personal view on the statement.

*The Common Agricultural Policy is to address common issues relating to the environment, climate change, water management and biodiversity.*

- 92.5% (466) of total interviewees agreed/ strongly agreed with the context statement, with 89% to 95% of respondents in each age category standing in agreement.
- 5% (26) of interviewees, half of whom being Adults (14), neither agreed nor disagreed with the statement in question.
- 1% (7) of total respondents, mostly Adults (4), shared a negative perception.
- 5 interviewees indicated that they did not know how to express their judgement.

*The Common Agricultural Policy is to provide support to the agricultural sector, lack of which might lead to economic and social problems.*

- 88% (443) of research survey respondents agreed/ strongly agreed with the statement that lack of support to the agricultural sector might lead to economic and social problems, with 92% (155) of Mature Adults, 87% (146) of Young Adults, and 85% (142) of Adults, passing this judgement.
- 8% (42) of interviewees, half of whom being Adults (21), neither agreed nor disagreed with the statement in question.
- 3% (13) of total respondents, the majority of whom being Young Adults (7), were in disagreement or/ in strong disagreement with the statement that lack of support by CAP might lead to economic and social problems.
- 6 respondents held no personal view on the statement.

**RESPONDENTS' VIEWS ON THE LEVEL OF IMPORTANCE OF ISSUES TO BE ADDRESSED BY CAP**

The Research Instrument made provisions for the compilation of data reflecting Respondents' perceptions on the importance that a future EU Common Agricultural Policy tackles a number of issues related to the agricultural sector.

## **A. Agricultural Products, New Services and Innovative Technological Practices**

The Common Agricultural Policy should:

- [a]. ensure the sufficient and secure supply of quality agricultural products in response to market demand.
- [b]. ensure more varied agricultural products.
- [c]. ensure the production of more healthy agricultural products.
- [d]. facilitate the introduction of new services related to agriculture e.g. agro tourism.
- [e]. enable the implementation of new and innovative technological practices and production processes.
- [f]. assist the agro-food sector to exploit better opportunities for the provision of high quality and high value added products.

## **B. The Farmer and the Environment**

The Common Agricultural Policy should:

- [a]. ensure farming practices that care for the environment and biodiversity.
- [b]. ensure the welfare of farm animals.
- [c]. preserve the natural and cultural environment.
- [d]. provide a good standard of living for farmers and their families.
- [e]. help the farmers face the challenges imposed by climate change.
- [f]. encourage farmers to use water efficiently.
- [g]. encourage farmers to make use of and contribute to the production of alternative energy, e.g. bio fuels.

## **C. The Future of the Agricultural Sector**

The Common Agricultural Policy should:

- [a]. safeguard the future of the agricultural sector.
- [b]. retain existing jobs and create new employment in the rural sector.

## Salient Research Findings

### A. Agricultural Products, New Services and Innovative Technological Practices

*CAP should ensure the sufficient and secure supply of quality agricultural products in response to market demand.*

- 90% (453) of the total 504 research survey interviewees perceive the tackling of issue by CAP to ensure the sufficient and secure supply of quality agricultural products in response to market demand as important/ very important, with 94% (158) of Mature Adults having this perception. Young Adults and Adults stand practically at par in opinion with 88%/ 87.5% (148/ 147).
- 7% (37) of respondents, in the majority Young Adults (16), identify this issue as neither important nor not important.
- 2% (8), equally divided between Young Adults and Adults, feel that the tackling of this issue by CAP is not important/ not important at all.
- 6 respondents were not in a position to indicate their personal view on the importance of the issue in question.

*CAP should ensure more varied agricultural products.*

- The guarantee for more varied agricultural products is considered by 88% (442) of the total 504 research survey interviewees as an important/ very important issue to be addressed by CAP, with 91% (153) of Mature Adults expressing this opinion, followed by Adults at 87% (146) and Young Adults at 85% (143).
- 6% (31) of interviewees, half of whom being Young Adults gauge this issue as neither important nor not important.
- 6% (28), in the majority Adults (12) but also with a good number of both Young and Mature Adults, feel that the tackling of this issue in conjunction with the guarantee by CAP for more varied agricultural products is not important/ not important at all.
- 3 respondents did not indicate their personal view.

*CAP should ensure the production of more healthy agricultural products.*

- 98% (496) of the total 504 research survey interviewees feel that the tackling of issue by CAP to ensure the production of more healthy agricultural product is important/ very important, with 98% of respondents in every age category giving this indication.
- 1% (5) of respondents, evenly distributed amongst the three age categories, considers this issue as neither important nor not important.

- 1% (3) feels that the tackling of this issue by CAP is not important/ not important at all.

***CAP should facilitate the introduction of new services related to agriculture e.g. agro tourism.***

- The facilitation by CAP for the introduction of new services in the agricultural sector is deemed by 86% (435) of the total 504 research survey interviewees as an important/ very important issue, with 86% of respondents in every age category giving this indication.
- 8% (42) of interviewees, evenly distributed amongst the three age categories, feel that this issue is neither important nor not important.
- 3% (17), in the majority Young Adults (9), feel that the facilitation by CAP for the introduction of new services in the agricultural sector is not important/ not important at all issue to be tackled.
- 10 respondents did not convey their opinion with regards the importance of this issue.

***CAP should enable the implementation of new and innovative technological practices and production processes.***

- 93% (471) of the total 504 research survey interviewees perceive the tackling of the issue in context as important/ very important, with 95% (160) of Mature Adult respondents having this perception, followed by 94% (158) of Young Adults and 91% (153) of Adult respondents.
- 5% (25) of respondents, half of whom being Adults (13) identify this issue as neither important nor not important.
- 1% (7), evenly distributed amongst the three age categories, feel that the tackling of this issue by CAP is not important/ not important at all.
- 1 respondent did not indicate his views.

***CAP should assist the agro-food sector to exploit better opportunities for the provision of high quality and high value added products.***

- Assistance by CAP to the agro-food sector towards the exploitation of better opportunities is deemed as an important/ very important issue to be tackled by CAP by 93% (468) of the total 504 research survey interviewees, with perception of the importance of this issue standing practically at par for Mature Adults and Young Adults at 94% (158), and Adults at 90% (151).
- 6% (29) of interviewees, mostly Young Adults and Adults, gauge this issue as neither important nor not important.

- 1% (5), in the larger part made up of Adults, expressed that this is not an important/ not important at all issue to tackle.
- 2 respondents did not express their opinions.

## **B. The Farmer and the Environment**

### *CAP should ensure farming practices that care for the environment and biodiversity.*

- 92% (466) of the total 504 research survey interviewees perceive the tackling of issue by CAP, to ensure that farming practices which take care of the environment and biodiversity are used by the agricultural sector, as important/ very important, with 95% (159) of Young Adults, followed by 93% (156) of Adults, and 90% (151) of Mature Adults conveying this opinion.
- 6% (28) of respondents, in the majority Mature Adults (13), identify this issue as neither important nor not important.
- 1% (6), the majority of whom being Adults, feels that the tackling of this issue by CAP is not important/ not important at all.
- 4 respondents were not in a position to indicate their personal view on the importance of the issue in question.

### *CAP should ensure the welfare of farm animals.*

- Tackling the issue to ensure the welfare of farm animals is considered by 97% (491) of the total 504 research survey interviewees as an important/ very important issue to be addressed by CAP, with 97%+ of Respondents in all the three age categories expressing this importance.
- 2% (12) of interviewees, registered equally from the different age categories, gauge this issue as neither important nor not important.
- Only one Adult respondent feels that the tackling of this issue by CAP in conjunction with the welfare of farm animals is not important/ not important at all.

### *CAP should preserve the natural and cultural environment.*

- 95% (480), of the total 504 research survey interviewees, feel that the preservation of the natural and cultural environment by CAP is important/ very important, this being perceived by 98% (165) of Young Adults, followed by 95% (159) of Mature Adults, and 93% (156) of Adults.

- 4% (20) of respondents, in the majority Adults (11), consider this issue as neither important nor not important.
- 1% (4) feels that the tackling of this issue by CAP is not important/ not important at all.

*CAP should provide a good standard of living for farmers and their families.*

- The provision of a good standard of living for farmers and their families by CAP is deemed by 91% (457) as an important/ very important issue, with 95% (160) of Mature Adult respondents giving this indication. Response by Young Adults and Adults stands practically at par at 88% (148).
- 6% (32) of interviewees, mostly Young Adults and Adults, feel that this issue is neither important nor not important.
- 3% (14), half of whom being Adults, feel that the provision of a good standard of living for farmers and their families by CAP is a not important/ not important at all issue to tackle.
- 1 respondent did not convey his opinion with regards the importance of this issue.

*CAP should help the farmers face the challenges imposed by climate change.*

- 93% (470) of the total 504 research survey interviewees perceive the tackling of the issue in context as important/ very important, with 95% (159) of Mature Adult respondents having this perception. Response by Young Adults and Adults stands practically at par at 92% (155).
- 6% (30) of respondents, evenly distributed amongst the three age categories, identify this issue as neither important nor not important.
- 1% (3), mostly Young Adults, feels that the tackling of this issue by CAP is not important/ not important at all.
- 1 respondent did not indicate his views.

*CAP should encourage farmers to use water efficiently.*

- Encouraging farmers to use water efficiently is deemed as an important/ very important issue to be tackled by CAP by 96.5% (486) of the total 504 research survey interviewees, this being perceived by 98% (165) of Mature Adults. Response by Young Adults and Adults stands practically at par at 95% (160).
- 3% (15) of interviewees, evenly distributed amongst the three age categories, gauge this issue as neither important nor not important.
- 2 respondents expressed that this is not an important/ not important at all issue to tackle.

- One respondent did not express his opinion.

***CAP should encourage farmers to make use of and contribute to the production of alternative energy, e.g. biofuels.***

- 90% (455) expressed that it is important/ very important that CAP encourages farmers to make use of and contribute to the production of alternative energy, with 92% (155) of Young Adults, followed by 90% (151) of Mature Adults, and 89% (149) of Adults having this perception.
- 7% (34) of respondents, evenly distributed amongst the three age categories, identify this issue as neither important nor not important.
- 2% (9), the majority of whom being Adults, feel that the tackling of this issue by CAP is not important/ not important at all.
- 6 respondents were not in a position to indicate their personal view on the importance of the issue in question.

**C. The Future of the Agricultural Sector**

***CAP should safeguard the future of the agricultural sector.***

- 96% (486), of the total 504 research survey interviewees, are of the opinion that it is important/ very important that CAP safeguards the future of the agricultural sector, with 96%+ of Respondents in all the three age categories expressing this importance.
- 3% (16) of respondents, evenly distributed amongst the three age categories, identify this issue as neither important nor not important.
- 2 respondents feel that the tackling of this issue by CAP is not important/ not important at all.

***CAP should retain existing jobs and create new employment in the rural sector.***

- Tackling the issue related to the retention of existing jobs and the creation of new employment in the rural sector is considered by 94% (475) of the total 504 research survey interviewees as an important/ very important issue to be addressed by CAP, this being perceived by 91% (153) of Young Adults. Response by Adults and Mature Adults stands practically at par at 95% (160).
- 5% (24) of interviewees, the majority of whom being Young Adults (14), feel that this issue is neither important nor not important.

- Only 1% (3) of respondents feels that tackling the issue of the retention of existing jobs and the creation of new employment by CAP is not important/ not important at all.
- 2 respondents were not in a position to indicate their personal view on the importance of the issue in question.

## **RESPONDENTS' RATING OF RESPONSIBILITIES SHOULDERED BY THE COMMON AGRICULTURAL POLICY**

In this Section, Respondents were asked to rate the level of importance which they attributed to the following responsibilities of the Common Agricultural Policy:

[a]. Ensuring the welfare of farm animals.

[b]. Supplying the population with healthy and safe agricultural products at a reasonable price and meeting market demands.

[c]. Preserving rural areas and dealing with the challenges of climate change, water management, biodiversity, and alternative energy.

[d]. Addressing economic growth and employment in the rural sector.

[e]. Encouraging and improving quality of life in the countryside.

[f ]. Providing alternative sources of energy such as bio fuels, as well as other non-food products e.g. medicines.

### **Salient Research Findings**

The analysis of research findings related to the rating exercise carried out amongst all Respondents to determine the most important responsibilities of the Common Agricultural Policy reveals the following rankings:

- The responsibility of CAP in ensuring the welfare of farm animals was rated by 97% (487) of total interviewees as the first most important responsibility. The improvement of the quality of life in the countryside, and the supply of healthy and safe agricultural products, at a reasonable price, which meets market demands, ranked second place with percentage ratings of 95.2% (480) and 95% (479) respectively.
- In third place, with a rating of 93.4% (471) of total respondents, results the responsibility of CAP to preserve rural areas and to deal with the challenges of climate change, water management, biodiversity, and alternative energy. This third place ranking is closely tailed by a 93% (468) rating attributed by Respondents to the responsibility that CAP addresses economic growth and employment in the rural sector.
- The provision of alternative sources of energy such as bio fuels, as well as other non-food products, e.g. medicines ranks last with a percentage rating of 89% (450).

- The analysis of ratings by age bracket reveals that the order of rankings was retained with the exception that: a) Young Adults rated the provision of alternative sources of energy such as bio fuels, as well as other non-food products, e.g. medicines in third place; b) Adults rated the preservation of rural areas and dealing with the challenges of climate change, water management, biodiversity, and alternative energy as the most important responsibility to be shouldered by CAP; c) Mature Adults rated the improvement of the quality of life in the countryside in first place.

## **IMPROVEMENTS IN THE AGRICULTURAL SECTOR IN MALTA**

Respondents were asked to specifically recommend improvements which, in their opinion, should be implemented in the agricultural sector in Malta.

### **Salient Research Findings**

#### *Improvements in the Agricultural Sector in Malta.*

The great majority of research survey respondents, irrespective of age, felt inclined to leave a suggestion at the end of the interview related to improvements which they would like to see in the agricultural sector in Malta. Respondents' recommendations and comments were classified under five main headings these being: The Agricultural Sector, Agricultural Products, Taking Care of the Environment, Alternative Energy and Miscellaneous comments.

*(Note: The number at the end of each recommendation/comment indicates the number of times the recommendation/comment was expressed by different respondents).*

### **Improvement in the Agricultural Sector in Malta – by Age Brackets**

#### **18 – 35 yrs**

##### **The Agricultural Sector**

- The importance of wells, agro tourism and the monitoring of prices should be stressed (3)
- Help farmers by giving them more money to spend on their farm and incentives (3)
- Collection of rainwater and more efficient use of reservoirs (2)
- More investment in agro tourism so that the economy could flourish (2)
- More investment on research for improving quality products (2)
- More training to promote farming to future students (2)
- More production and investment in organic farming (2)
- Prices should be monitored to safeguard consumers (2)

- Promotion of agricultural studies (2)
- Benefits available to the agricultural sector should be promoted in order to promote the sector (1)
- Diversification – not just the growth of products but also incentives for the introduction of new services (1)
- Funds should be given for the purchasing of modern mechanisms and for the promotion of hygiene (1)
- Help and funds must be given to those who need it (1)
- Help should be given to all farmers irrespective whether they are from North or South of Malta (1)
- It must be ensured that all funds available from EU for the agricultural sector are distributed to farmers (1)
- It must be ensured that chemicals used by farmers are safe (1)
- It must be ensured that the farmer is making the full profit out of his product (1)
- Land should be made more available for those interested (1)
- Land should be used more for organic farming and should be used specifically for farming purposes (1)
- Less construction in agricultural land (1)
- More information about this sector so the consumer can make a more informed choice (1)
- More price controls on sellers not farmers (1)
- More sustainable use of resources (1)
- Plantation of more trees and ensure that animals are kept in good conditions (1)
- Products should be graded under “organic” and “inorganic” (1)
- The agricultural sector is receiving enough help from the Government and the EU (1)
- The fact that the University course of Agriculture is more expensive, does not promote the sector (1)
- The farmers’ work should to be appreciated more so that they can compete with the foreign product (1)
- The good treatment of farm animals must be ensured (1)
- The situation in general of the agricultural sector can be improved (1)

- There should be financial support for farmhouses to be transferred away from residential areas due to smells and hygiene (1)

### Agricultural Products

- A reduction in prices and the monitoring of quality (7)
- Better quality of food products (4)
- A variety of products should be available all year round (4)
- Farmers should be given help in order to produce more good quality products (3)
- Fresher and healthier products available (3)
- Local product should be made more appealing in terms of prices (3)
- Maltese products should be protected and made to compete on the same level with foreign products (3)
- Better presentation of Maltese products and information written on the packaging (2)
- Less pesticides should be used for health reasons (2)
- Prices should be moderate (2)
- The Maltese products should be packed more attractively without added costs (2)
- Agricultural goods should be improved by natural methods (1)
- Encourage the export of authentic Maltese produce (1)
- Encourage the production of Maltese goods (1)
- Farmers should harvest their crops when they are ready and mature, not before (1)
- Good local products with reasonable prices are important (1)
- Help is required for an increase in Maltese products (1)
- It is a shop's responsibility to provide fresh products (1)
- Maltese products are superior in quality to those which are imported – Maltese products should be promoted (1)
- More attention regarding hygiene should be given especially amongst street vendors (1)
- On the Maltese products there should be nutritional information and suggestions (1)
- Our good quality products should be exported (1)
- Price fluctuations in agricultural goods should be reduced (1)

- Prices should be made online, in order for these to be monitored (1)
- Prices should be monitored (1)
- Promotion of local products (1)
- Quality graded with the price. No rotten or raw fruits in the same container (1)
- Reasonable prices with a good quality product (1)
- Reduce in the use of pesticides to improve local products (1)
- Respondent is a vegetarian and she can't complain about the vegetables she buys (1)
- Respondent still opts to buy the local product even though foreign products might be cheaper (1)
- Respondent would like to see more of the Maltese product on the market (1)
- Stop vegetable hawkers from selling their products on a main road with the result of these being covered by cars exhaust (1)
- Vegetables and fruits are not packed so one cannot ensure the best quality (1)

### **The Environment**

- Cleaner and nicer environment (3)
- More greenery (2)
- Better care of the environment and harsher fines for those who commit acts of vandalism (1)
- It must be ensured that all fields are equally well kept (1)
- Maltese landscapes should be taken care of (1)
- More rubble walls (1)
- More trees, more fresh air, more green areas (1)
- Nature should be kept clean (1)
- The countryside should be improved and made more accessible (1)
- The natural environment should be taken more care of (1)
- Top priority should be the caring of the environment (1)

### Alternative Energy

- More help and funds should be aimed to further the use of renewable energy (5)
- Monitoring of the use of table water – like the use of boreholes (3)
- Introduce bio fuels (1)
- Proper water management (1)
- Subsidy for use of alternative energy (1)

### Miscellaneous

- Although farmers are already taking care of their land, they still need help (1)
- More awareness to world technology – research (1)
- The eating of fruit must be promoted also amongst school children. Such schemes were recently stopped (1)

## 36 - 55 yrs

### The Agricultural Sector

- Fair prices should be guaranteed to farmers - middlemen make too much money and price is expensive (4)
- More organic farming, more competition between farmers to adopt organic farming so prices will be less (3)
- Farmer is to gain full benefits and profits (2)
- There should be more awareness to increase the number of farmers in this sector (2)
- To promote the use of natural substances (2)
- EU has to protect our agriculture, as it tends to protect large farms rather than small ones (1)
- EU must help us more than other countries since we are a small nation (1)
- EU should enforce animal rights in order to safeguard them (1)
- Farmers do make efforts however when their products are affected by hazards they should be helped (1)
- Farmers have many expenses but do not recuperate cost when selling their product (1)

- Farmers were better when Malta was not an EU member. Funding means more debts and recession (1)
- Make agriculture more attractive by giving a field to those who would like to work (1)
- More employment in this sector (1)
- More help and initiatives and better remuneration for the hard work (1)
- More help in other sectors not only in agriculture (1)
- More help to have unique Maltese products (1)
- More modern farms (1)
- More watering of crops (1)
- Respondent prefers that animals be carried in vans and treated better, not bouncing from side to side (1)
- Teach farming practices that are used abroad (1)
- The Government should give full subsidies directly to farmers and be consistent in policies (1)

### Agricultural Products

- Lower prices with more monitoring (16)
- Careful use of pesticides and bio methods of pest control (11)
- Maltese products should be presented more attractively and packed with attention (6)
- Maltese goods are always better than those imported and so must encourage local production (5)
- Consistency in prices, not too expensive and not too cheap (4)
- Good quality fruits (3)
- Less fertilizers (3)
- More variety of products, and the best of products to remain in Malta rather than be exported (3)
- Promotion of Maltese products (3)
- Good agricultural products, but monitoring and price control of vegetable street vendors is required (2)
- Importance of just and fair prices (2)

- More fruit production (2)
- Reduce foreign imports so local farmers would be incentivised (2)
- Although the Maltese product has improved, presentation still needs to be improved (1)
- Better prices but healthy products (1)
- Certain products are still not up to standard although Malta forms part of the EU. Some are highly expensive (1)
- Control of artificial feed given to animals (1)
- Establish a good price for high quality products (1)
- Fresh products, fair prices on products (1)
- Hawkers must have an area rather than be present in every road (1)
- Imported fruit is cheaper (1)
- Improvement of product presentation and details on the packaging (1)
- Local prices are higher so one is inclined to buy the foreign product; this does not incentivise consumer to buy local (1)
- Maintain certain standards when transporting food and vegetables for hygienic purposes (1)
- Maltese product is always the best but the prices should be lower (1)
- Money is spent but prices are still high (1)
- Organic products should be more accessible (1)
- Prices are still high even though the sector is subsidized (1)
- Respondent prefers to buy from shops rather than vans where crops are not protected (1)
- Seasonal products (1)
- Since we are EU members better quality products are expected (1)
- Try to invest more in fresh products rather than frozen ones (1)
- With the help of CAP more products that are not in season will be found (1)

### **The Environment**

- Better land and water management (3)
- Countryside should be enjoyed by everyone and left clean (3)
- No more construction in the countryside or near the sea (2)

- Rubble walls and valleys should be protected without rubbish being thrown there (2)
- Abandoned land should be given to farmers nearby (1)
- Healthy environment and landscapes (1)
- More collaboration between different environmental entities (1)
- Reduce abandoned fields which end up as dumping sites (1)
- Repair rubble walls and no waste of land (1)
- Respondent asks to leave the farms as they are (do not build buildings instead of them) (1)
- Respondent would like to see an increase in agricultural land and this to be treated as an important issue (1)
- Water is expensive and if left unmanaged, every field is going to be dry and unproductive (1)
- Water quality should be improved to help farmers (1)
- We are not getting the full potential from EU. Air quality should be improved (1)
- Wells should be utilized more for the preservation of water (1)

#### Miscellaneous

- Awareness to appreciate the farmer's work (1)
- Important to protect the welfare of the animals (1)

### 56 + yrs

#### The Agricultural Sector

- Farmers need more financial support and subsidies (3)
- Farmers should be appreciated for their work (3)
- Help should be dedicated to all farmers irrespective if they are from the North or the South of Malta (3)
- The pitkali market - fairer prices, better service. Respondent feels that the monopoly between farmers should be eliminated (3)
- Farmers sell at a low price and then the sellers sell for a much higher price (2)
- Incentive help for the local farmer to produce more local product (2)
- More investment in technological devices (2)

- The farmer is not taking the whole profit out of it, the middle man is benefiting more than the farmer (2)
- A co-operative to ensure diversity of products ex. not everybody growing carrots (1)
- Although improvement has already been done, there is always room for more improvement (1)
- Better prices for the farmer's products should be attained, rather than the seller making profit (1)
- Better use of resources, to protect local farmers (1)
- Clear ideas and guidelines to report certain faults within the system (1)
- Education to farmers in taking decisions and using machinery in efficient and effective ways (1)
- Farmers are to earn equal money as the sellers in greengrocers (1)
- Farmers complain that they do not earn enough from their crops - this should be remedied (1)
- Farmers should be helped to improve their vehicles to lessen their workload (1)
- Farmers should be well paid for their work because we depend on them for products (1)
- Farmers should earn more than the middle men (1)
- Farms should be specific ex. Tomato farms (1)
- Help farmers with drip irrigation systems, new machines, techniques to mature products in short time (1)
- More help should be invested (1)
- More hygienic farms and make sure that allocated money is spent correctly (1)
- More investment on research for further quality (1)
- Part-time farmers are limited in investment opportunities so there should be full time opportunity (1)
- Refunds to farmers for investments should not take too long to be processed (1)
- Should have a proper irrigation system (1)
- The farmer should benefit from a larger profit to be able to present the product in a better manner (1)
- To see that animals are cared for on the farms (1)

## Agricultural Products

- Lower prices but more quality and health standards (8)
- Better packaging and variety of products (6)
- Local products are better in quality so we should help this industry to have more of local product and maintain a good standard (6)
- Increase awareness in the use of insecticides and pesticides, awareness on organic farming (5)
- Reduce fertilizers (5)
- A wider variety of Maltese fruit and vegetables because nowadays so many products are imported (4)
- Prices should be monitored, reduced and controlled because compared with foreign products, Maltese products are expensive (4)
- Consumers should be protected with regards to prices (3)
- Products must be graded and priced accordingly (3)
- Good quality vegetables and fruits (2)
- Increase supply to have lower prices (2)
- The Maltese product should be more affordable for pensioners (2)
- A variety of products all the year round (1)
- Better products at reasonable prices (1)
- Certain localities such as Mġarr have more quality products (1)
- Certain organic products are not accessible to find and are expensive (1)
- Certain products are not always fresh (1)
- Cheaper products (1)
- Fair prices (farmers make relatively high profits) (1)
- Fresh local vegetables daily to meet the demand (1)
- Good packaging (first impression counts) (1)
- Goods should be natural not with chemicals such as pesticides, and affordable (1)
- Help must be holistic. We must promote only Maltese products (1)

- Hygiene and storage during transportation of products should be improved (1)
- Hygienic products (1)
- Import less fruit so that locals buy fruit locally produced (1)
- More hygienic controls should be imposed on vegetable and fruit vendors having products exposed to exhaust (1)
- More price control amongst street vegetable vendors (1)
- More promotion of natural products in schools (1)
- Products should be watered with good water (1)
- Respondent feels that agricultural products should not be exported so that there won't be the need to import products (1)
- Respondent is satisfied with the quality of the Maltese product (1)
- Sometimes local products taste bad because of pesticides (Spraying) (1)
- Test fruit for pesticide (1)
- To stress more that farmers do not add chemicals to water (1)

### **The Environment**

- Land should not be wasted but taken care of (6)
- Protect the environment (3)
- An increase in green land so as to reduce air pollution (2)
- Collection of rainwater is important, as is the control of borehole extraction; use of wells is to be encouraged (2)
- Preservation of rural land, no more building in the countryside (2)
- Better use of water resources to reduce wastage (1)
- Better water management (1)
- Cleanliness everywhere, fields, streets etc (1)
- No stealing of water from boreholes (1)
- Preserve the natural environment (1)

### **Miscellaneous**

1. Awareness to appreciate the farmer's work (1)

2. Help is needed in other sectors as well such as fishery, bakery etc. (1)

## Appendix B – Questions used for the quantitative survey

### Have you ever heard or read about the CAP, the European Union’s Common Agricultural and Rural Development Policy?

(Indicate one of the following: Yes and I know what it means / Yes, but I don’t know what it is about / No).

### Could you kindly indicate your personal views on the following statements relating to a European Union Common Agricultural Policy (CAP)? Please indicate if you disagree or strongly disagree/ agree or strongly agree/ neither agree nor disagree / don’t know for each statement.

1. The agricultural sector needs financial support from the European Union to remain economically viable.
2. Financial support to farmers from the EU ensures the provision of agricultural products all the year round.
3. Financial support to farmers from the EU is needed to help them improve their agricultural activity.
4. Farmers need financial support from the EU to counter price instability of products.
5. Public support to farmers is needed to face unforeseen events such as drought, flooding, crop and animal diseases, etc.
6. CAP, the Common Agricultural Policy should incentivise farmers to opt for the type of land management that delivers the best outcome, such that the abandonment of land is avoided and the environment is taken care of.
7. CAP, the Common Agricultural Policy is needed in view of the fact that agricultural the production of agricultural goods is not always economically viable.
8. CAP, the Common Agricultural Policy is needed so as to maintain an attractive countryside landscapes and protect the natural environment.
9. Support from the European Union level provides for a strong, competitive and sustainable agricultural sector.
10. A European Union policy ensures that the same rules are applied throughout the EU resulting in and therefore having more stable prices and addressing the key issues such as price stability and the use of best agricultural practices.
11. The European Union should preserve our natural and cultural rural heritage.
12. The European Union is to address common issues in the field of the environment, climate change, water management and biodiversity.

13. Lack of support to the agricultural sector might lead to economic and social problems.

**Could you kindly indicate your personal views on how important it is that any future EU Common Agricultural Policy (CAP) tackles the following issues? Is the issue Very Important, Important, neither important nor not important, Not Important, Not Important at all or don't know?**

1. The Common Agricultural Policy should ensure the sufficient and secure supply of quality agricultural products in response to market demand.
2. The Common Agricultural Policy should ensure more varied agricultural products.
3. The Common Agricultural Policy should ensure the production of more healthy agricultural products.
4. The Common Agricultural Policy should facilitate the introduction of new services related to agriculture eg: agrotourism.
5. The Common Agricultural Policy should ensure farming practices that care for the environment and biodiversity.
6. The Common Agricultural Policy should ensure the welfare of farm animals.
7. The Common Agricultural Policy should preserve the natural and cultural environment.
8. The Common Agricultural Policy should provide a good standard of living for farmers and their families.
9. The Common Agricultural Policy should enable the agricultural sector to implement new and innovative technological practices and production processes.
10. The Common Agricultural Policy should help the farmers face the challenges imposed by climate change.
11. The Common Agricultural Policy should encourage farmers to use water efficiently.
12. The Common Agricultural Policy should encourage farmers to make use of and contribute to the production of alternative energy eg. biofuels.
13. The Common Agricultural Policy should assist the agro-food sector to exploit better new opportunities by providing high quality and high value added products.
14. The Common Agricultural Policy should help safeguard the future of the agricultural sector.
15. The Common Agricultural Policy should help retain existing jobs and create new employment in the rural sector.

**Kindly give a rating indicating the importance of the following responsibilities of the Common Agricultural Policy (CAP) (very important/ important/ neither important nor not important/ not important/ not important at all/don't know).**

1. Ensuring the welfare of farm animals.
2. Supplying the population with healthy and safe agricultural products at a reasonable price and meet market demands.
3. Preserving rural areas and dealing with the challenges of such as climate change, water management, biodiversity, and alternative energy.
4. Addressing economic growth and employment in the rural sector.
5. Encouraging and improving quality of life in the countryside.
6. Providing alternative sources of energy such as bio fuels, as well as other non-food products eg: medicinals.

## **Appendix C – Questions used for the qualitative survey**

### **Why do we need a European Common Agricultural Policy?**

- 1 Does a common policy across Europe make sense in a Europe with a diversified agricultural sector?
- 2 Should the EU continue to give financial contribution to agriculture? Why? In what areas?
- 3 What are the strengths and weaknesses of the CAP?
- 4 What do you think are the most important challenges facing agriculture today?
- 5 Has the CAP delivered the required results in facing up to these challenges?
- 6 What are the future challenges of agriculture and how they can be better targeted through CAP and rural development policy?

### **What are society's objectives for agriculture in all its diversity?**

1. What are the expectations of EU citizens/consumers from agriculture in your opinion? Do you think that agriculture in Europe has met these expectations?
2. Has agriculture provided consumers with high quality food at reasonable prices?
3. Has agriculture provided farmers with a fair standard of living?
4. Is agriculture playing a pivotal role in protecting our environment (land management, water quality, soil erosion and biodiversity)?
5. Do you believe that the agricultural sector could contribute to the economy?

### **Why should we reform the current CAP and how can we make it meet society's expectations?**

1. Do you think there is a need for the CAP to be reformed? If yes, in which areas do you feel that this change is required?
2. Do you think that financial assistance under the CAP is meeting core objectives such as sustainability (environmental, social and economic) and better quality of life?
3. Do you think that enough financial resources are being allocated towards the EU agricultural sector? If budget should be reduced, in which areas should such a reduction take place? If the budget is to be increased, in which areas should such an increase take place? (i.e. is current budget allocation to direct aid and rural development balanced?)

4. Has CAP been successful in orientating the production of quality products that meets consumer expectations?
5. Has the CAP managed to find the right balance between agricultural practices and the protection of the environment via sustainable farming practices?
6. How can the CAP help ensure that the natural environment is protected and preserved?
7. Is CAP contributing in assisting farmers fight climate change? If yes, how?

### **What tools do we need for tomorrow's CAP?**

1. The existing Common Agricultural Policy provides a package of measures and policies divided into three main types; market expenditure, direct aids and rural development. Which strand do you believe has worked well and which strand do you believe has worked poorly?
2. How can support be better targeted to bring about the most efficient allocation of resources?
3. What improvements to the current policy can ameliorate stability of agricultural incomes?
4. What form of direct aid should be available to farmers? (Your opinion should tie in issues related to different types of farming and specificities of Member States in order to ensure a balanced allocation of funds across all Member States).
5. If direct subsidies are to be given, what is expected in return from our farmers?
6. How can this policy address market fluctuations (both price and production)?
7. What can be done so that consumers pay a reasonable price, and farmers earn a reasonable income?
8. How can CAP help the agricultural sector address issues related to climate change?
9. How can the CAP address issues related to standards of goods imported from non-EU Member States? What is your opinion and how do you suggest to address this issue?