



| Flash |

European Union Farmers' Protests

F-2024-02-09a

Classification: TLP:CLEAR

Criticality: Medium

Intelligence Requirements: Geopolitical, Supply Chains

February 9, 2024

Scope Note

ZeroFox Intelligence is derived from a variety of sources, including—but not limited to—curated open-source accesses, vetted social media, proprietary data sources, and direct access to threat actors and groups through covert communication channels. Information relied upon to complete any report cannot always be independently verified. As such, ZeroFox applies rigorous analytic standards and tradecraft in accordance with best practices and includes caveat language and source citations to clearly identify the veracity of our Intelligence reporting and substantiate our assessments and recommendations. All sources used in this particular Intelligence product were **identified prior to 10:00 AM (EST) on February 9, 2024**; per cyber hygiene best practices, caution is advised when clicking on any third-party links.

Flash | EU Farmers' Protests

› Key Findings

- Farmers' protests have spread across Europe and look set to continue until European Union (EU)-wide elections in June 2024.
- The biggest protests include roadblocks that disrupt transport and supply chains.
- Farmers in Spain look set to hold the most disruptive protests in February 2024.
- The protests are largely over government regulations and cheaper foreign competition.

Details

Since December 2023, farmers' unions and associations have been organizing disruptive protests and blockades throughout the EU over disagreements on agricultural policies. Agricultural workers in Spain, Germany, Italy, Greece, France, and Belgium set up barricades on major roads, cut off access to key ports, and, in certain cases, used their tractors to block the main motorways of two capital cities (Paris and Brussels). Farmers in Poland are expected to join in a general strike and a blockade of the border with Ukraine on February 9, and farmers in Spain and Italy are expected to block their capitals on February 9 and 10.

These demonstrations have two main causes: government regulations and cheap food imports from abroad. Organizers accuse their national governments and the EU of imposing onerous environmental laws and budgetary measures that imperil the livelihood of agricultural workers.

- In November 2023, the EU Parliament passed new rules aimed at restoring natural ecosystems, which stipulated that farmers must leave 4 percent of their land fallow each year in order to apply for subsidies.¹
- At the same time, governments in several EU countries, including Germany and France, had moved to reduce or eliminate tax breaks for diesel fuel and agricultural vehicles as part of a broader effort to lower budget deficits.²

European farmers are also concerned about the negative impact of cheap grain and foodstuffs imported from other countries and regions.

- The EU scrapped numerous tariffs on Ukrainian agricultural products in an effort to provide economic support to the Kyiv government following the Russian invasion in February 2022.³
- More recently, officials in Brussels appeared to be on the cusp of signing a long-awaited free trade agreement with Mercosur, a South American economic union.⁴ However, these measures threaten to increase the availability of lower-cost agricultural goods within the EU and would thereby undercut profits for European farmers—especially those engaged in small-scale production.

The disruptive farmers' protests have spurred concessions from both national governments and EU agencies.

- Leaders in Germany and France have so far postponed or repealed planned increases in diesel fuel taxes.⁵
- Also, governments in every country affected by the rural unrest have announced new financial measures to assist the agricultural sector.

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[hXXps://www.consilium.europa\[.\]eu/en/press/press-releases/2023/11/09/nature-restoration-council-and-parliament-reach-agreement-on-new-rules-to-restore-and-preserve-degraded-habitats-in-the-eu/](https://www.consilium.europa.eu/en/press/press-releases/2023/11/09/nature-restoration-council-and-parliament-reach-agreement-on-new-rules-to-restore-and-preserve-degraded-habitats-in-the-eu/)

²

[hXXps://www.reuters\[.\]com/world/europe/german-farmers-protest-with-tractors-against-austerity-measures-2023-12-18/](https://www.reuters.com/world/europe/german-farmers-protest-with-tractors-against-austerity-measures-2023-12-18/)

³ [hXXps://ec.europa\[.\]eu/commission/presscorner/detail/en/ip_24_562](https://ec.europa.eu/commission/presscorner/detail/en/ip_24_562)

⁴

[hXXps://www.esmmagazine\[.\]com/supply-chain/france-says-eu-commission-to-end-trade-deal-talks-with-merc-sur-countries-258473](https://www.esmmagazine.com/supply-chain/france-says-eu-commission-to-end-trade-deal-talks-with-merc-sur-countries-258473)

⁵

[hXXps://www.lemonde\[.\]fr/economie/live/2024/01/31/en-direct-des-agriculteurs-arrive-devant-rungis-la-commission-europeenne-donne-des-gages-a-la-profession_6213513_3234.html](https://www.lemonde.fr/economie/live/2024/01/31/en-direct-des-agriculteurs-arrive-devant-rungis-la-commission-europeenne-donne-des-gages-a-la-profession_6213513_3234.html)

- For its part, the EU Commission has paused regulations that would require a certain percentage of farmland to be kept fallow and pledged to limit the import of Ukrainian agricultural products into the bloc.⁶
- Finally, the proposed free trade agreement with the Mercosur nations of Brazil, Argentina, Uruguay, and Paraguay is unlikely to go forward in the aftermath of this unrest.

The conciliatory measures by authorities have largely placated protesting farmers in some countries, such as France, where they have suspended demonstrations and lifted road blockades, but protests continue elsewhere.⁷ These concessions have likely inspired farmers in other parts of the EU, who now expect their own countries to make similar overtures to them.

- Spanish farmers are currently hosting the largest demonstrations, having already blocked roads nationwide—including those in the second city of Barcelona. Spanish farmers aim to target the capital, Madrid, on February 10 and again on February 21.^{8,9} Other large unions, including truckers and rail workers, have also joined the movement.¹⁰
- Italian farmers spent a week traveling to the capital, Rome, ahead of a blockade on February 10.¹¹

Incumbent EU politicians have linked the protests to their political survival ahead of EU-wide elections in June 2024.¹²

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[hXXps://www.brusselstimes\[.\]com/902664/eu-makes-concession-to-farmers-stricter-european-rules-postponed-again-tbtd](https://www.brusselstimes.com/902664/eu-makes-concession-to-farmers-stricter-european-rules-postponed-again-tbtd)

⁷ [hXXps://www.euronews\[.\]com/2024/02/01/french-farmers-unions-suspend-protests-after-government-offer](https://www.euronews.com/2024/02/01/french-farmers-unions-suspend-protests-after-government-offer)

⁸

[hXXps://www.infobae\[.\]com/espana/2024/02/08/los-agricultores-planean-entrar-en-madrid-el-sabado-los-transportistas-van-a-paralizar-los-mercados-con-intento-de-llegada-a-ferraz/](https://www.infobae.com/espana/2024/02/08/los-agricultores-planean-entrar-en-madrid-el-sabado-los-transportistas-van-a-paralizar-los-mercados-con-intento-de-llegada-a-ferraz/)

⁹ [hXXps://www.euronews\[.\]com/2024/02/07/spanish-farmers-stage-tractor-protests-over-eu-policies-and-prices](https://www.euronews.com/2024/02/07/spanish-farmers-stage-tractor-protests-over-eu-policies-and-prices)

¹⁰

[hXXps://www.renfe\[.\]com/es/es/grupo-renfe/comunicacion/renfe-al-dia/avisos/servicios-minimos-para-jornada-huelga-viernes-9-febrero-convocada-sindicato-ccoo](https://www.renfe.com/es/es/grupo-renfe/comunicacion/renfe-al-dia/avisos/servicios-minimos-para-jornada-huelga-viernes-9-febrero-convocada-sindicato-ccoo)

¹¹

[hXXps://www.euronews\[.\]com/2024/02/07/farmers-in-italy-expected-to-protest-on-streets-of-rome-in-coming-days](https://www.euronews.com/2024/02/07/farmers-in-italy-expected-to-protest-on-streets-of-rome-in-coming-days)

¹² [hXXps://elections.europa\[.\]eu/en/](https://elections.europa.eu/en/)

- The elections determine the composition of the EU Parliament, where many of the regulations farmers are protesting were drafted and put into law. Protesters likely see campaign season as ideal for extracting concessions from politicians fearful of losing their jobs—particularly far-right politicians who have tied EU policies regarding agriculture and immigration to the elevated cost of living in Europe.
- The EU parliament is currently dominated by centrist politicians, but polls forecast that far-right political parties against immigration and support for Ukraine will gain ground.
- Far-right political parties have attempted to co-opt some farmers' protests to push their agenda. Hungarian Prime Minister Viktor Orbán, the only Russian ally state remaining in the EU, publicly backed the protesting farmers after abandoning his months-long blockade of EU funds to Ukraine.¹³
- In January 2024, ZeroFox identified Russian-backed threat actors (who normally target supporters of Ukraine) aiding the farmers by launching distributed denial of service (DDoS) attacks against German municipal websites.¹⁴

Conclusion

In the longer term, the EU's sheltered and uncompetitive agricultural sector will likely weigh down overall economic growth. Currently, growing food accounts for only 1.4 percent of the bloc's overall gross domestic product (GDP). In addition, an estimated two-thirds of European farms are modest, family-run operations that grow crops on plots smaller than five hectares.¹⁵ At the same time, the EU dedicates one-third of its yearly budget to agricultural subsidies—expenditures that totaled EUR 408.3 billion from 2014 to 2020.¹⁶ Any efforts to reform this inefficient system are met with organized and vociferous opposition by the farming community, leaving Europe at an impasse for the foreseeable future.

It is unclear if the farmers' protests will automatically trigger support for the far-right. The primary candidates of the European far-right are against immigration and support for Ukraine. However, western European farmers utilize foreign labor and are supportive of the generous subsidies offered by the EU. In Eastern Europe, Russia's war in Ukraine has

¹³ [hXXps://www.bbc\[.\]com/news/world-europe-68171911](https://www.bbc.com/news/world-europe-68171911)

¹⁴ ZeroFox Intelligence

¹⁵ [hXXps://www.economist\[.\]com/europe/2024/02/01/europes-grumpy-farmers-are-a-symptom-of-wider-malaise](https://www.economist.com/europe/2024/02/01/europes-grumpy-farmers-are-a-symptom-of-wider-malaise)

¹⁶ [hXXps://www.europarl.europa\[.\]eu/factsheets/en/sheet/106/financing-of-the-cap](https://www.europarl.europa.eu/factsheets/en/sheet/106/financing-of-the-cap)

seen an increase in Ukrainian agriculture that is normally destined for Asia and Africa flooding the markets and undercutting local farmers on price. Therefore, angry farmers are more likely to abstain from voting. Overall, the swell in far-right support is more likely to come from EU citizens concerned over heightened levels of immigration and the cost of living.

Appendix A: Traffic Light Protocol for Information Dissemination

	Red	Amber
WHEN SHOULD IT BE USED?	Sources may use TLP:RED when information cannot be effectively acted upon by additional parties and could lead to impacts on a party's privacy, reputation, or operations if misused.	Sources may use TLP:AMBER when information requires support to be effectively acted upon but carries risks to privacy, reputation, or operations if shared outside of the organizations involved.
HOW MAY IT BE SHARED?	Recipients may NOT share TLP:RED with any parties outside of the specific exchange, meeting, or conversation in which it is originally disclosed.	Recipients may ONLY share TLP:AMBER information with members of their own organization and its clients, but only on a need-to-know basis to protect their organization and its clients and prevent further harm. Note that TLP:AMBER+STRICT restricts sharing to the organization only.
	Green	Clear
WHEN SHOULD IT BE USED?	Sources may use TLP:GREEN when information is useful for the awareness of all participating organizations, as well as with peers within the broader community or sector.	Sources may use TLP:CLEAR when information carries minimal or no risk of misuse in accordance with applicable rules and procedures for public release.
HOW MAY IT BE SHARED?	Recipients may share TLP:GREEN information with peers and partner organizations within their sector or community but not via publicly accessible channels.	Recipients may share TLP:CLEAR information without restriction, subject to copyright controls.

Appendix B: ZeroFox Intelligence Probability Scale

All ZeroFox intelligence products leverage probabilistic assessment language in analytic judgments. Qualitative statements used in these judgments refer to associated probability ranges, which state the likelihood of occurrence of an event or development. Ranges are used to avoid a false impression of accuracy. This scale is a standard that aligns with how readers should interpret such terms.

Almost No Chance	Very Unlikely	Unlikely	Roughly Even Chance	Likely	Very Likely	Almost Certain
1-5%	5-20%	20-45%	45-55%	55-80%	80-95%	95-99%