

Annex xx - TEMPLATE OF FARM INVESTMENT PLAN

Name of natural persons and/or legal entity, recipient of advisory service package 3:

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Date of Farm Investment Plan:

Plan period (from year to year):

1. Strategy Farm Goals and Results

Describe in a few sentences the strategy goals and results, which are planned for the next five years (*10 years in case of planting of orchards and construction / reconstruction activities included under investment plan*):

1.1 Goals to be achieved:

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1.2 Results expected:

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Note: *Examples of strategic goals and results:*

- *Improvement in production of ;*
- *Improvement in integration of new technologies and practices in;*
- *Improvement in environmental protection;*
- *Meeting of EU and / or local standards;*
- *Improvement of efficiency and productivity through modernization of the technology in order to make the products at the market as competitive as possible;*
- *Improvement of product quality by introduction quality management system;*

- *Improvement of waste treatment and waste handling practices;*
- *Increase in the use of renewable energy and increase in energy efficiency;*
- *Introduction of energy-efficient and labour-reducing machinery and technologies which also improve sustainability and competitiveness;*
- *Introduction of local organic and GlobalGap standard certification of agricultural products;*
- *Introduction of modern irrigation systems and equipment.*
- *Reduction of ground water use for irrigation;*
- *Reduction of water losses;*
- *Rational use and storage of fertilizers, weed and pest control chemicals, and manure;*
- *Introduction of equipment for wastewater / sewage and livestock manure treatment;*
- *Introduction of equipment for reception, movement, cleaning / washing / drying / pre-cooling, sorting, grading, packing, refrigeration, labelling of agricultural products;*
- *Reduction by-products and/or waste*

2. Marketing Strategy

Provide a description of the strategic approach planned for marketing activities over the course of the next five years (*10 years in case of planting of orchards and construction / reconstruction activities included under investment plan*). This section should include details about current arrangements, involvement of third parties, target groups, markets, costs and finally plans.

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3. Equipment and/or Machinery *(which should be replaced and /or purchased / installed)*

Table 3.1 - List of equipment and machinery which should be replaced

Type of machine/equipment	Make / model / etc	Measure unit	Quantity	Year and quarter for replacement

Table 3.2 - List of equipment and machinery which should be purchased / installed

Type of machine/equipment	Make / model / etc	Measure unit	Quantity	Price for purchase / installed per 1 unit (in Euro)	Total cost for purchase / installed

4. Infrastructure within the farm *(which should be replaced, reconstructed and constructed)*

Table 4.1. List of infrastructure within the farm, which should be replaced *(including buildings, waste collection systems, water cisterns/infrastructure, access roads, agricultural stores, on-farm processing buildings/premises, internet infrastructure, energy infrastructure)*

Type/description of Infrastructure	Make / model / etc	Measure unit	Quantity / volume / capacity etc.	Year and quarter for replacement

Table 4.2 List of infrastructural works within the farm

Type/description of infrastructure	Make / model / etc	Measure unit	Quantity / volume / capacity etc.	Cost of construction / 1 unit (if applicable)	Total cost of construction (in Euro)

5. Action plan and Main activities for implementation of investments

Table 5.1 - List of main activities for implementation of investments including period (year / quarter) for acquisition / realization of investments by category

Category	Type of activity	Way of execution (purchase, rent, animal breeding, etc.)	Year / quarter of execution
Machinery/Equipment			
Infrastructure			
Marketing			
Others			

6. Production Programme for the next five years (*10 years in case of planting of orchards and construction / reconstruction activities included under investment plan*)

Table 6.1 - Crop production programme - Area (in donums)

Cultivated cultures	Current Year	Year.....	Year.....	Year	Year	Year.....

Table 6.2 - Animal breeding production programme – number of animals/hives

Type of Livestock	Current Year	Year.....	Year.....	Year	Year	Year.....

7. Financial Plan

Table 7.1 – Provide a description of the sources of finance that will be used to undertake the investments (machinery, equipment and infrastructure)

Source of finance	Amount	Loan period (in years)	rate of interest (%)
Own resources			
Contribution in kind			
Public support (grant)			
Loan 1			
Loan 2			
Other (please specify)			
Total			

8. Expected costs and income for the next five years (*10 years in case of planting of orchards and construction / reconstruction activities included under investment plan*)

Table 8.1. **Income** from activities within the farm

(Note: *Income includes income from realization of agricultural production, subsidies and other public support, income from food-processing activities, rent of machinery and land, income from provided external services and non-farm undertaken by the farmer activities including rural tourism, etc.*)

a. For current year

Type of crop / livestock / other income	Production			Price per 1 unit (In Euro)	Total
	Type	Measure unit	Quantity		

b. For years (*to be developed for a minimum of 5 yrs*)

Type of crop / animal / other income	Production			Price per 1 unit	Total
	Type	Measure unit	Quantity		

Table 8.2. **Costs for activities** within the farm and for investments

a. For current year

Activity / Investment			Price per 1 unit	Total
Type	Measure unit	Quantity		
Purchase of				
Construction of				
Reconstruction of				
Seeds for				
Planting material for				

<i>Activity / Investment</i>			Price per 1 unit	Total
Type	Measure unit	Quantity		
Fertilizers				
Pesticides				
Fuel				
Water				
External services				
Animal feed				
Medicines				
Electricity				
Machinery and equipment repairs and spare parts for machineries and equipment				
Small reconstruction works				
Social and health insurance				
Other insurance				
Interest				
Permanent labour costs				
Seasonal labour costs				
Fees, taxes and duties				
Small reconstruction works				
Social and health insurance				
Other insurance				
Interest				
Permanent labour costs				
Fees, taxes and duties				
Other:				
Other:				

b. For year

<i>Activity / Investment</i>			Price per 1 unit	Total
Type	Measure unit	Quantity		
Purchase of				
Construction of				
Reconstruction of				
Seeds for				
Planting material for				
Fertilizers				
Pesticides				
Fuel				
Water				
External services				
Animal feed				
Medicines				
Electricity				
Machinery and equipment repairs and spare parts for machineries and equipment				
Small reconstruction works				
Social and health insurance				
Other insurance				
Interest				
Permanent labour costs				
Seasonal labour costs				
Fees, taxes and duties				
Small reconstruction works				
Social and health insurance				
Other insurance				

<i>Activity / Investment</i>			Price per 1 unit	Total
Type	Measure unit	Quantity		
Interest				
Permanent labour costs				
Fees, taxes and duties				
Other:				
Other:				

Table 8.3. Sustainability of Investment Plan - **Comparison income and costs**

Year	Income	Costs	Difference between income and costs
Current Year			
Year 1			
Year 2			
Year 3			
Year 4			
Year 5			

Farm Investment Plan prepared by:

Advisor/s Name and Surname

Signature/s

Date: