



The 2019 EU Agricultural Outlook

EU outlook for the citrus market – oranges

13 November 2019



Agricultural outlooks

Available at:

https://ec.europa.eu/info/food-farming-fisheries/farming/facts-and-figures/markets/outlook_en



- Short-term forecast for main agri commodities
- EU balances on production, consumption and trade
- Published in March, July and October

- 10-year projections of EU agricultural markets and income \neq forecast
- 2019-2030 projections to be presented at the EU Agricultural Outlook conference (10-11 December 2019)



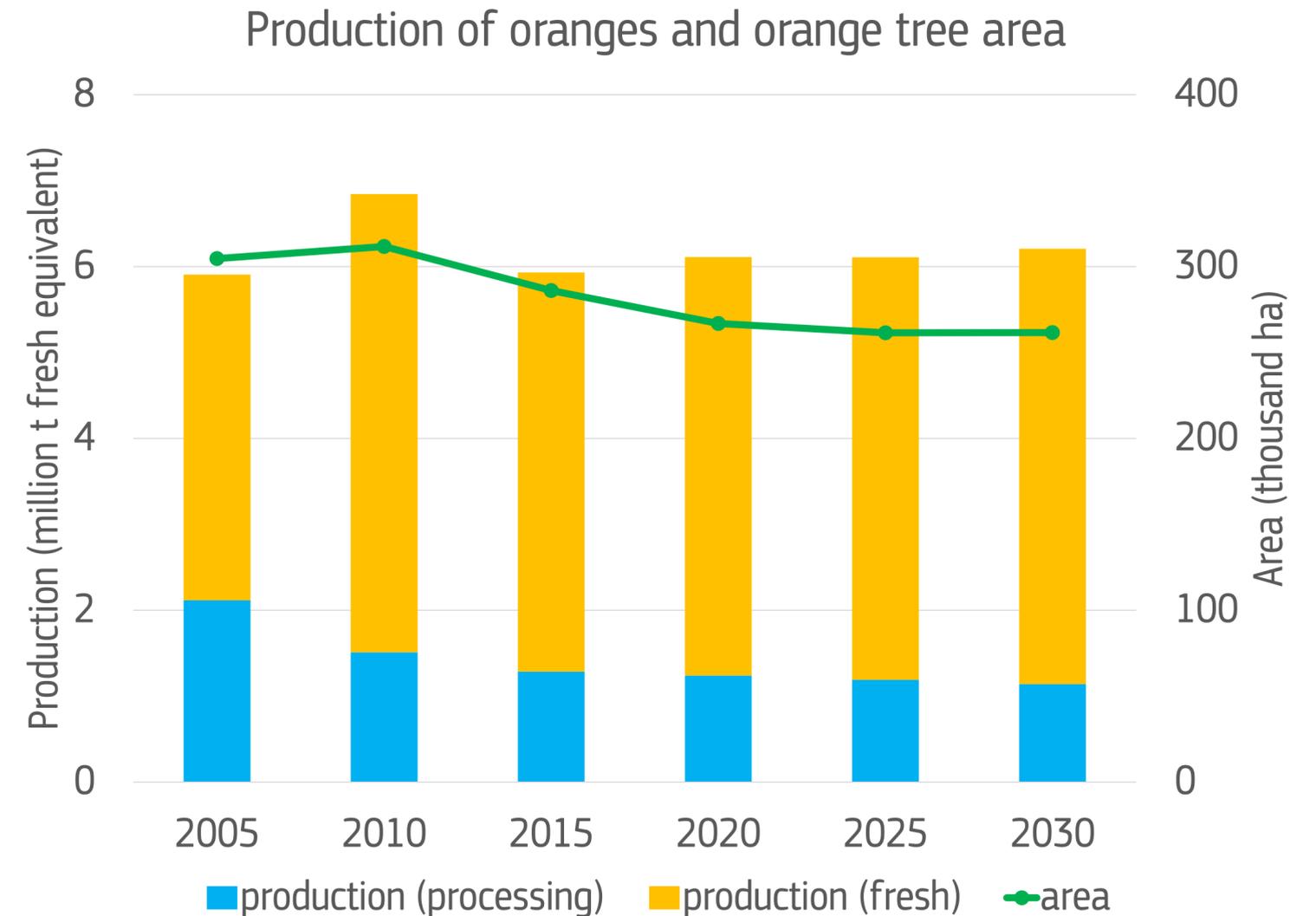
Citrus fruit - oranges

- Area and production stabilisation
- Dependency on imports
- Switching preferences

Production

The fresh market gains and remains the main outlet

- Stabilisation of orange tree area
- Limited yield improvement
 - from 22.5 to 23.7 t/ha (2018 vs. 2030)
- Stable production
 - Driven by the fresh market
 - Decreasing production for processing
 - 82% to the fresh market in 2030

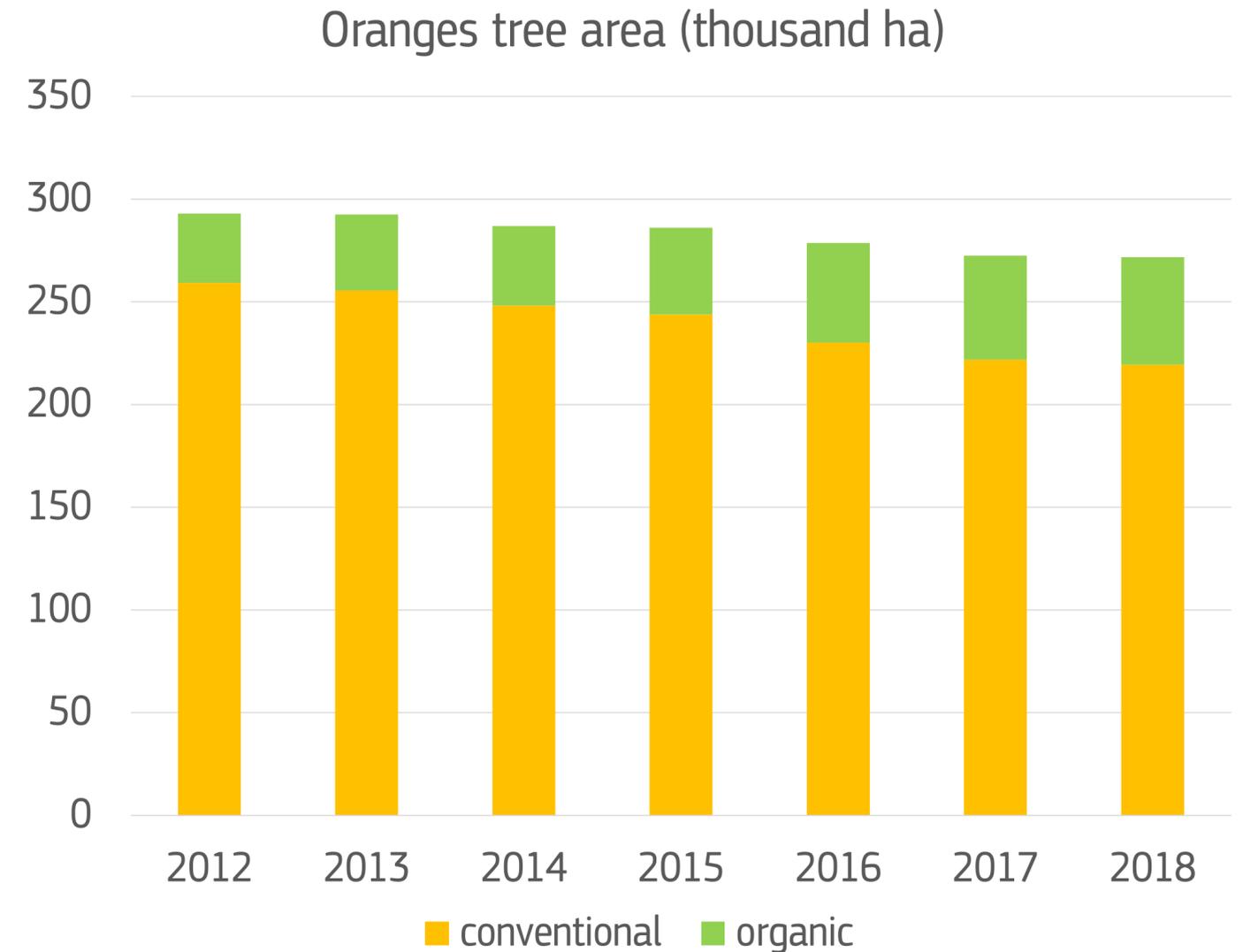
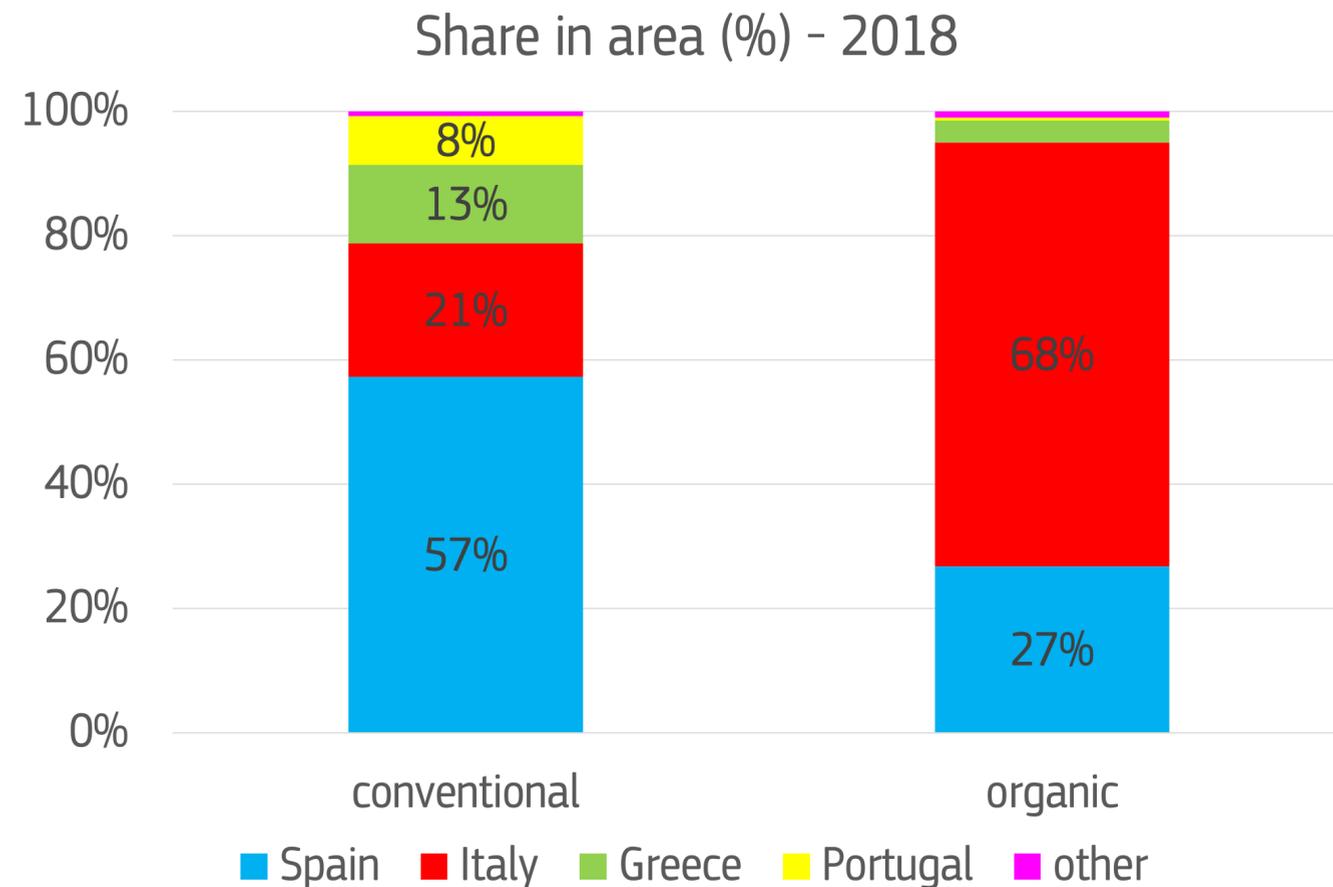


Source: DG Agriculture and Rural Development

Production

Dynamic market developments for organic

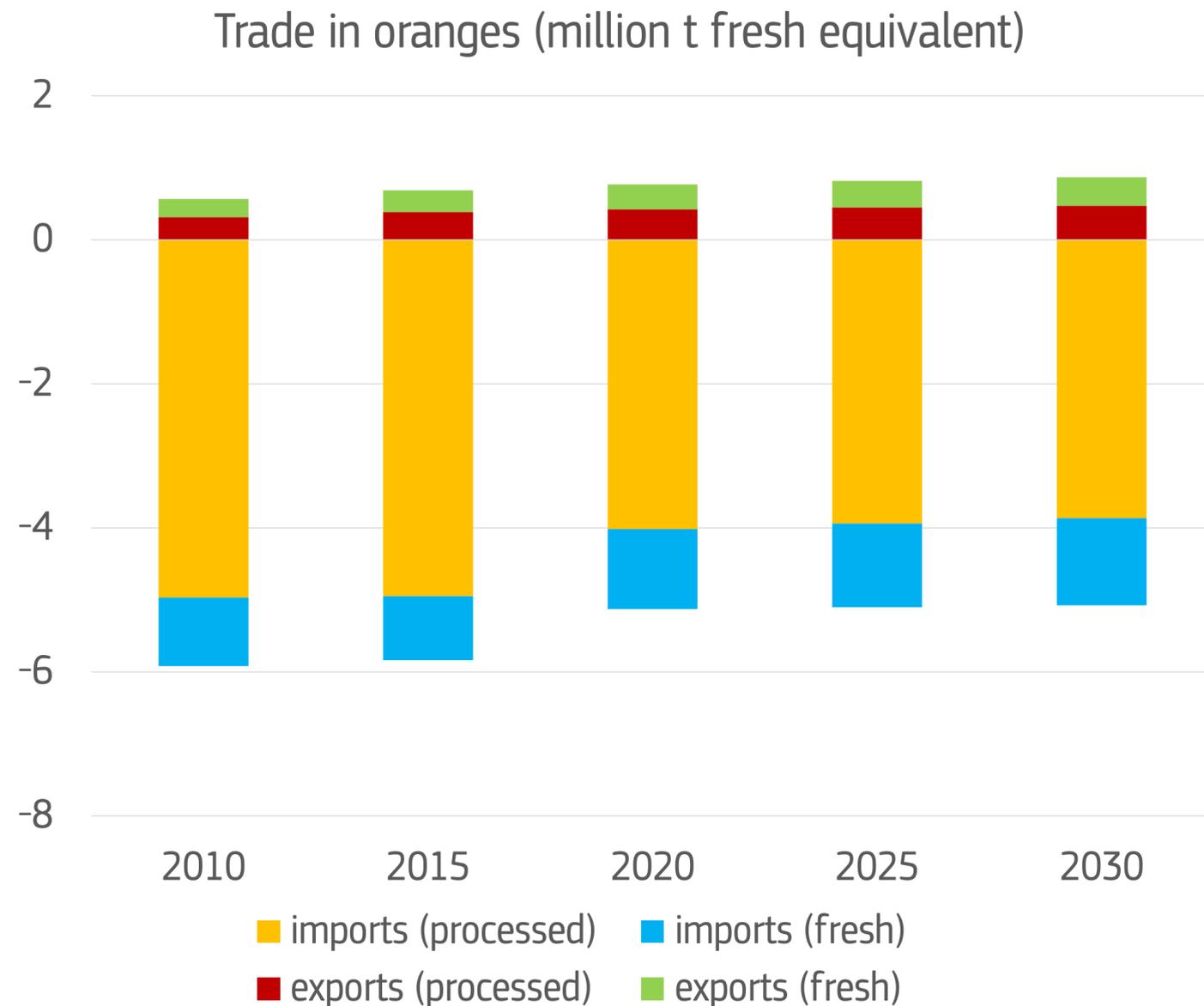
- Organic area at 19% in 2018
 - 40% in Italy, 10% in Spain



Source: DG Agriculture and Rural Development, based on Eurostat

Trade

Large dependency on imported juices



- Imports ~49% of total consumption in 2030
 - ~85% for processed in 2030
- Stable total imports
 - Some switch from processed to fresh
 - 76% of imports are juices in 2030 (vs. 83% in 2018)
- Increasing trend in exports
 - 0.9 million t fresh equivalent in 2030 (+0.2 million t)

Source: DG Agriculture and Rural Development



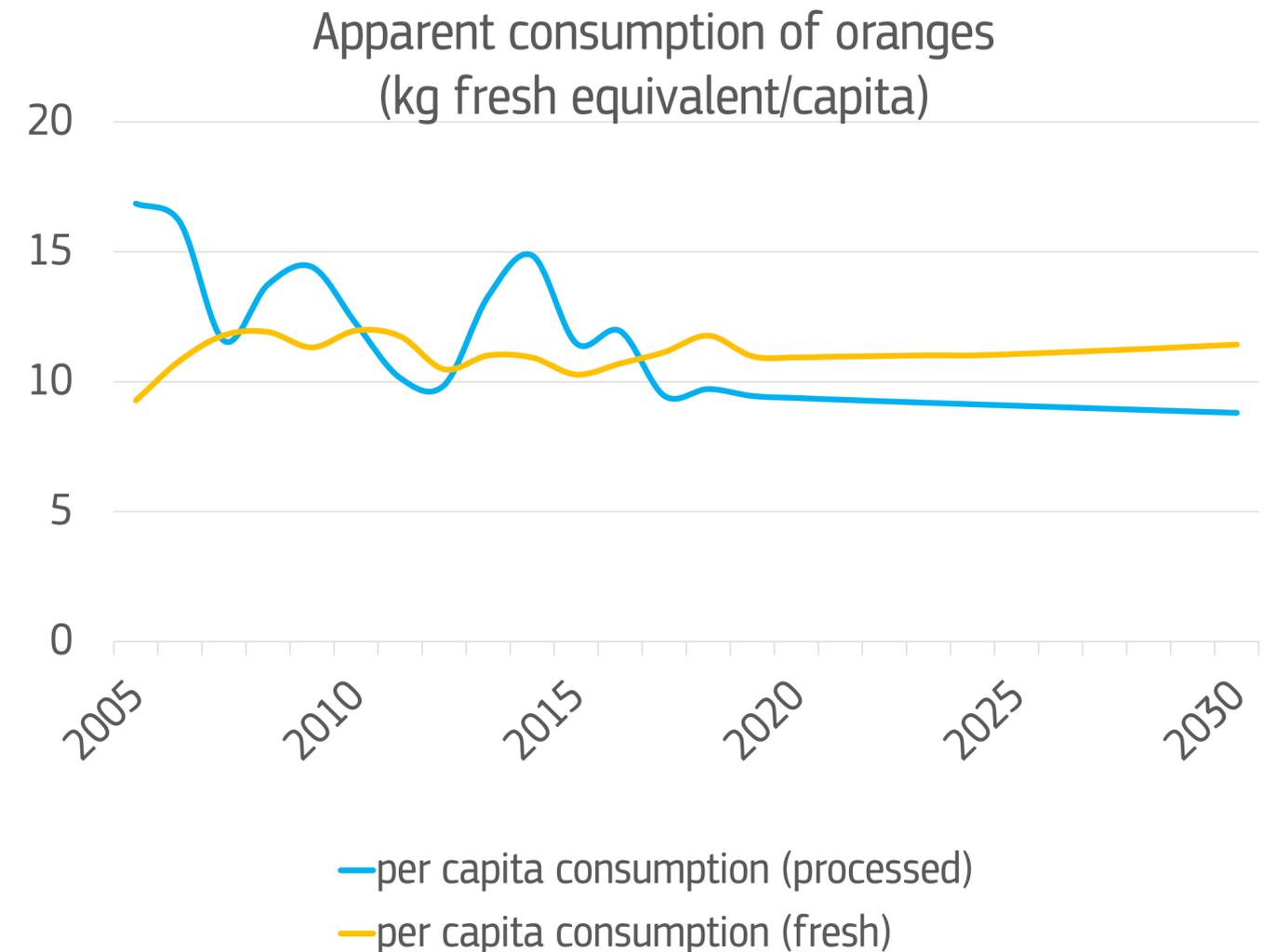
European
Commission

Agriculture and
Rural Development

Consumption

Switching consumer preferences for fresh oranges over processed

- Diverging trends
 - Decreasing consumption of processed:
from 11 to 8.8 kg/capita (2018 vs. 2030)
 - Increasing consumption of fresh:
from 10.9 to 11.4 kg/capita (2018 vs. 2030)
- Key driver:
 - Switch in juices from concentrates to fresh

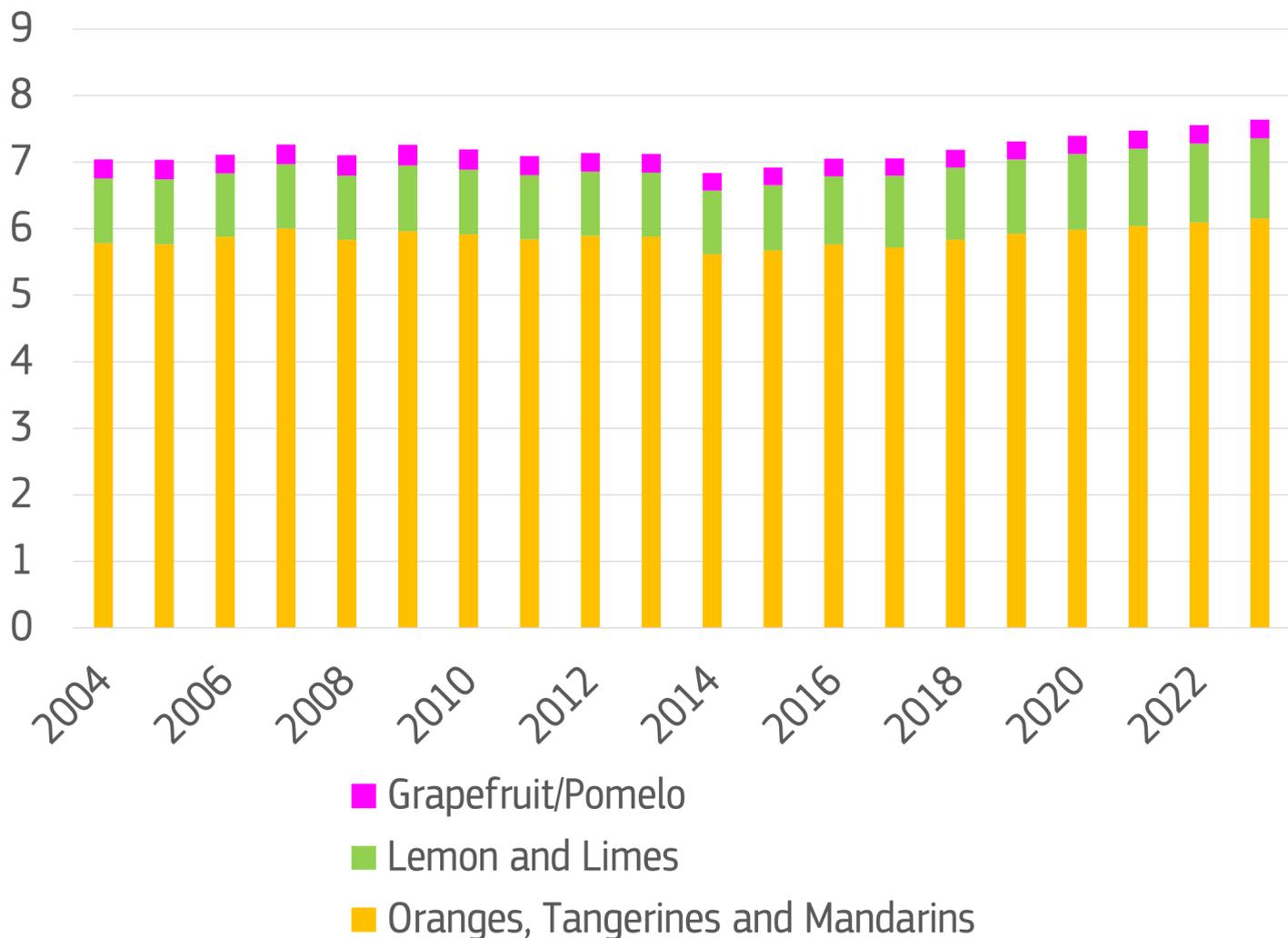


Source: DG Agriculture and Rural Development

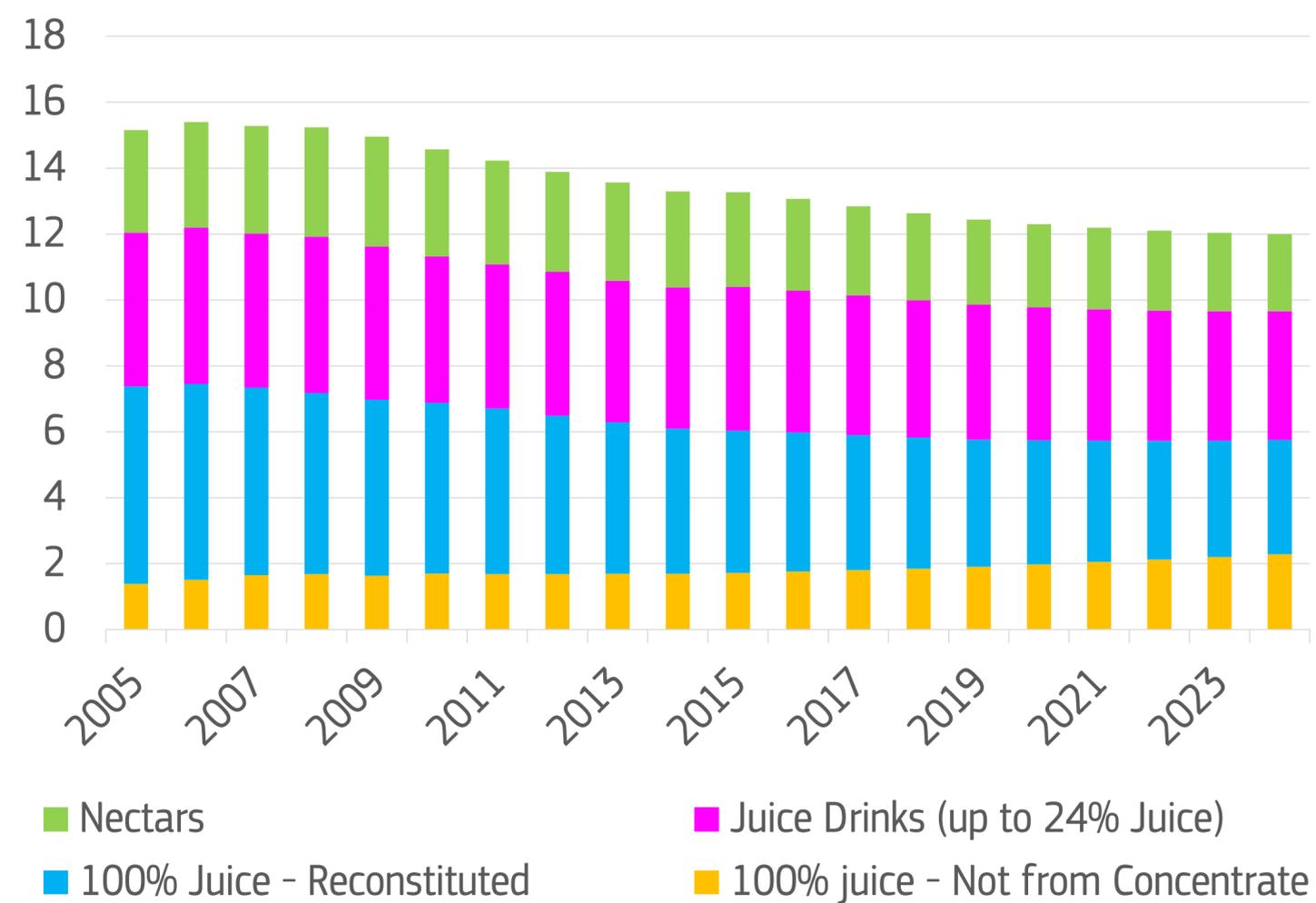
Consumption

Increasing retail sales of fresh citrus fruit and of fresh fruit juices

Retail sales of fresh citrus fruit (million t)



Retail sales of fruit juices (billion l)



Source: Euromonitor