



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



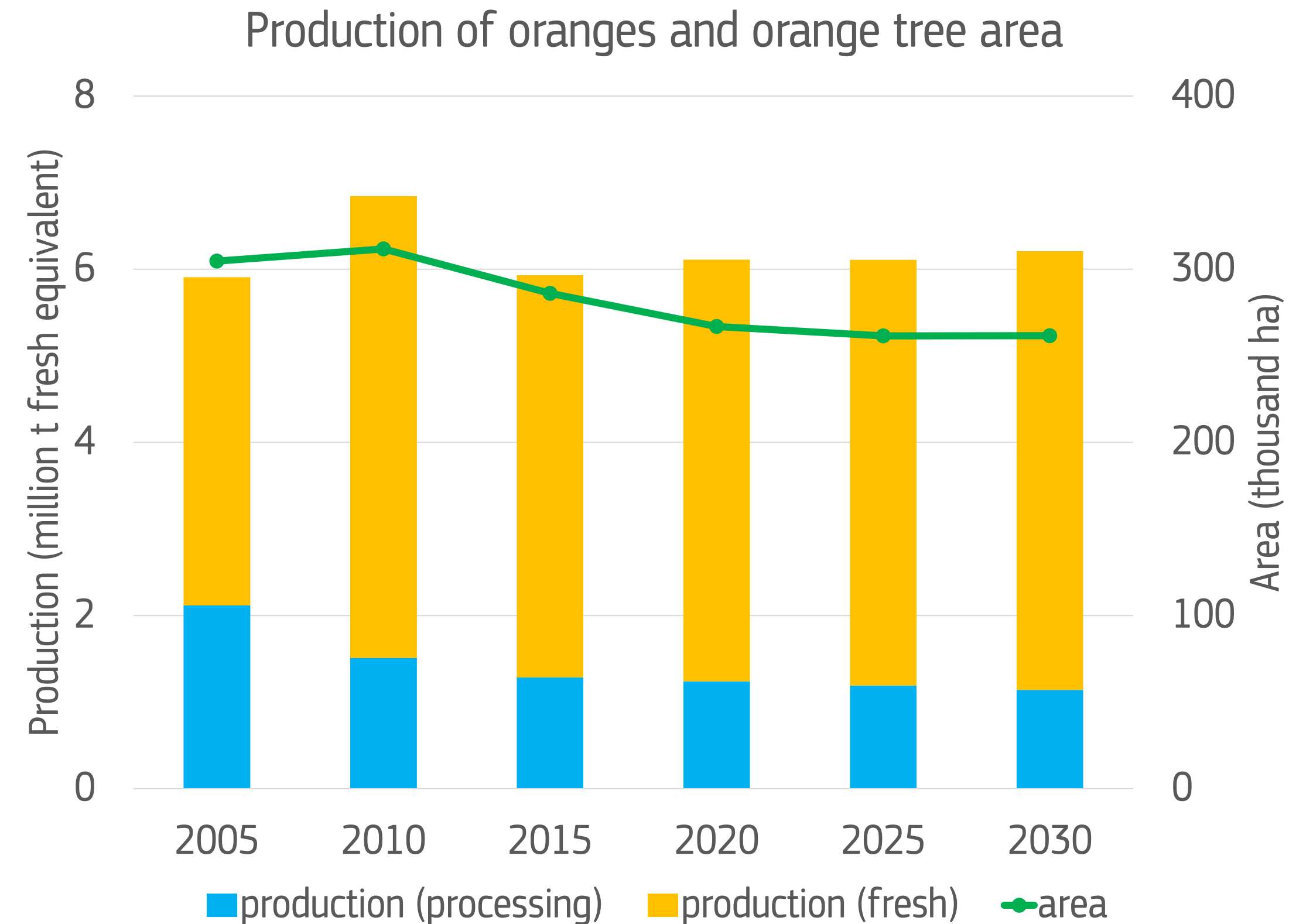
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Production

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

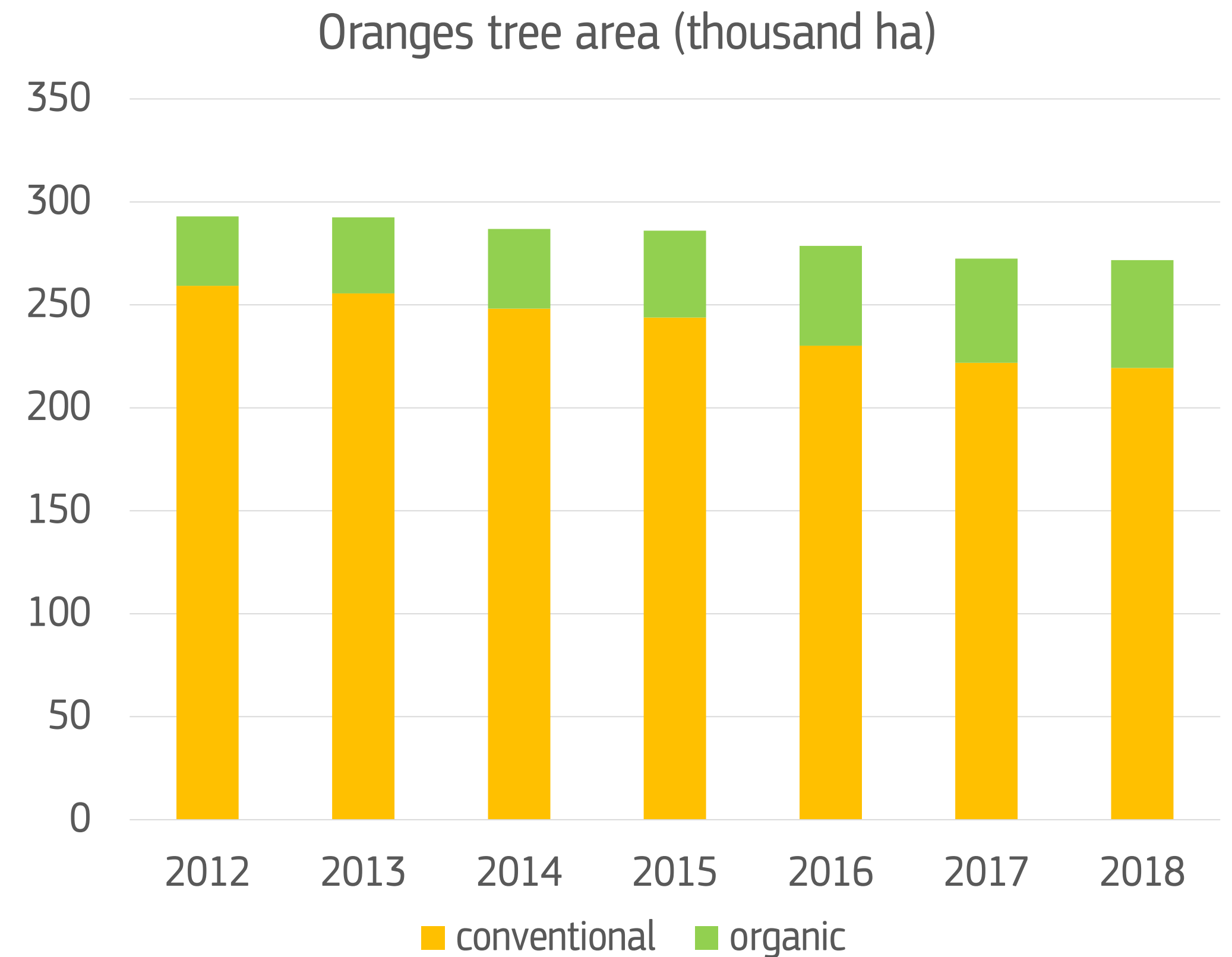
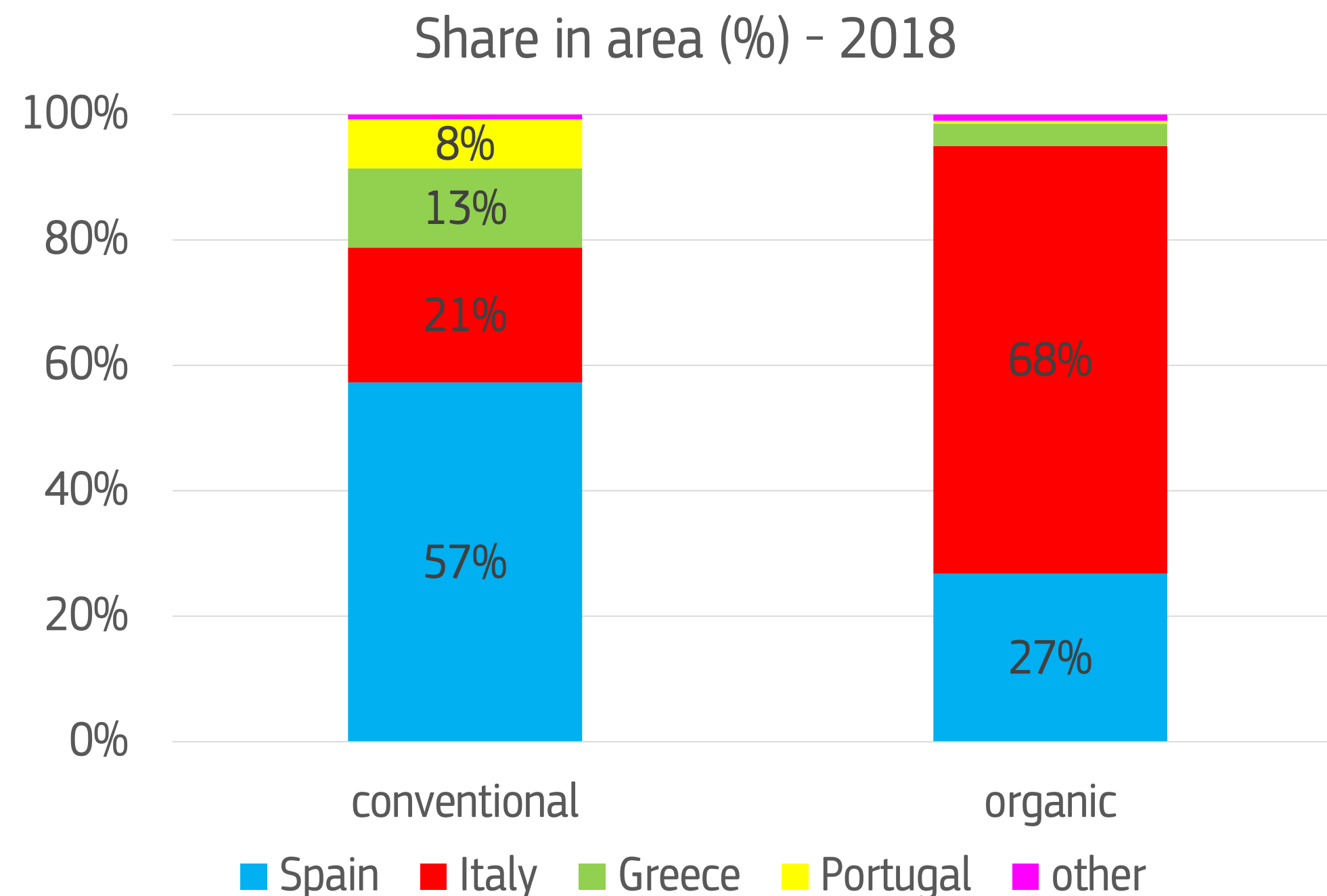


Source: DG Agriculture and Rural Development

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

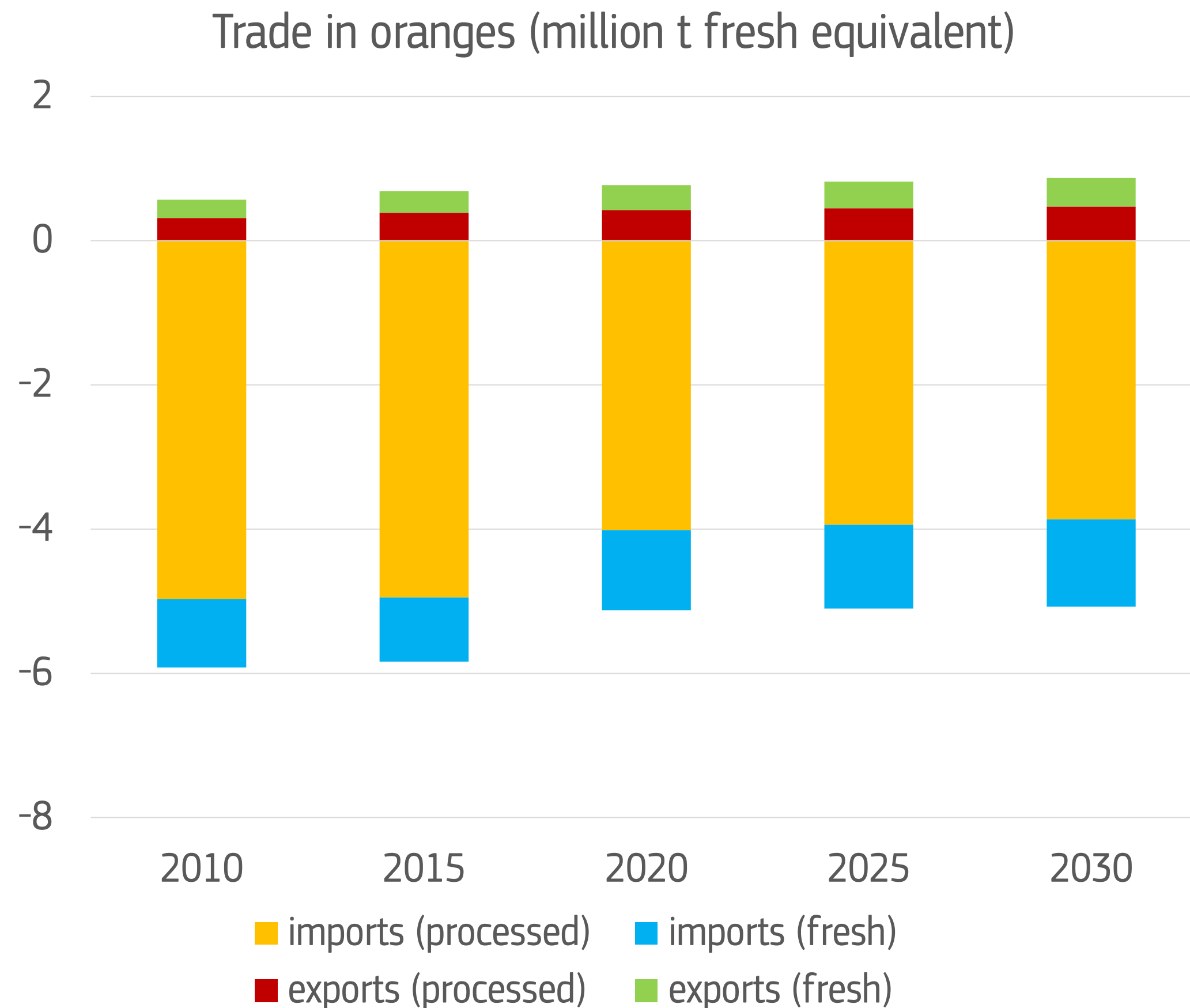


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Trade

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



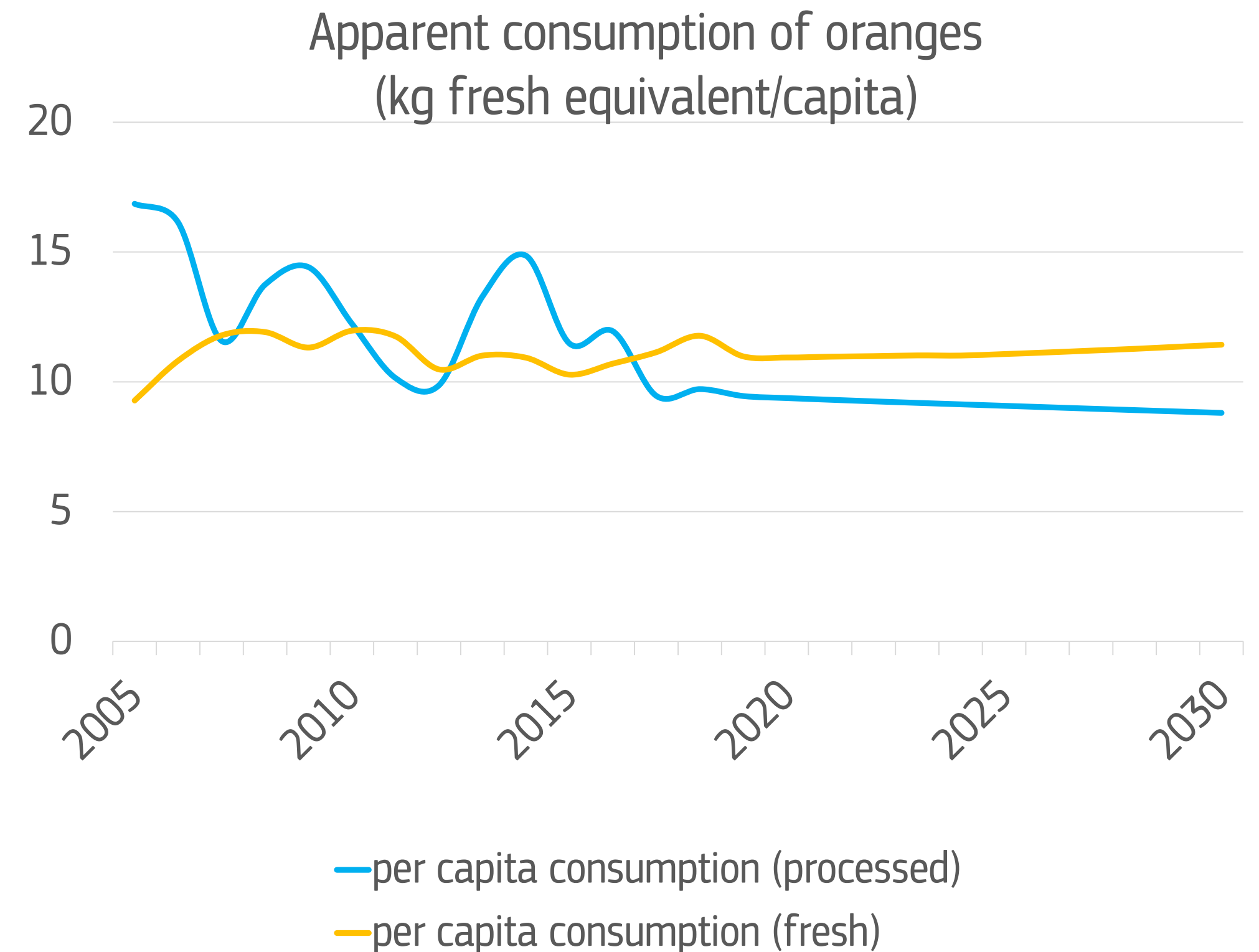
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Consumption

Switching consumer preferences for fresh oranges over processed

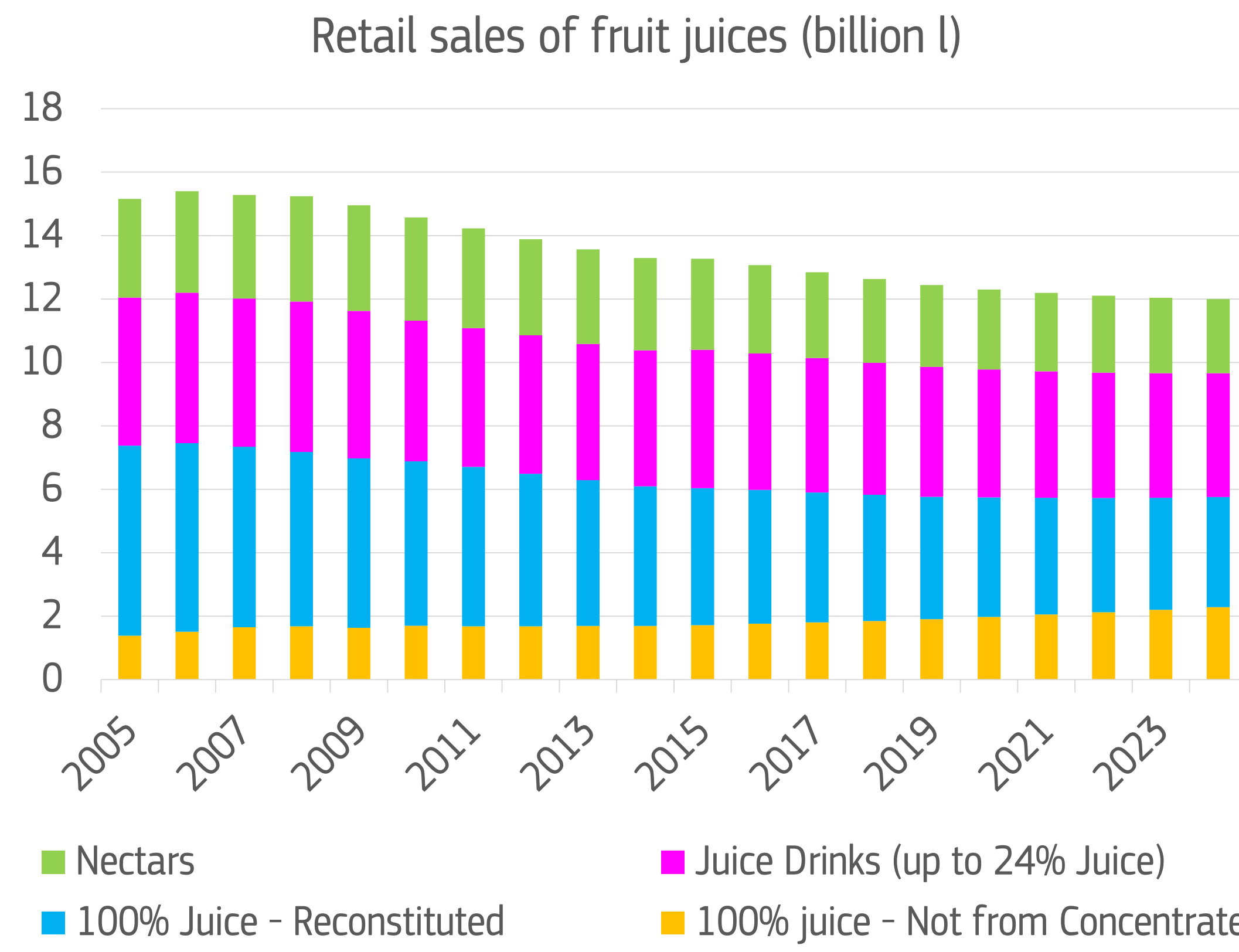
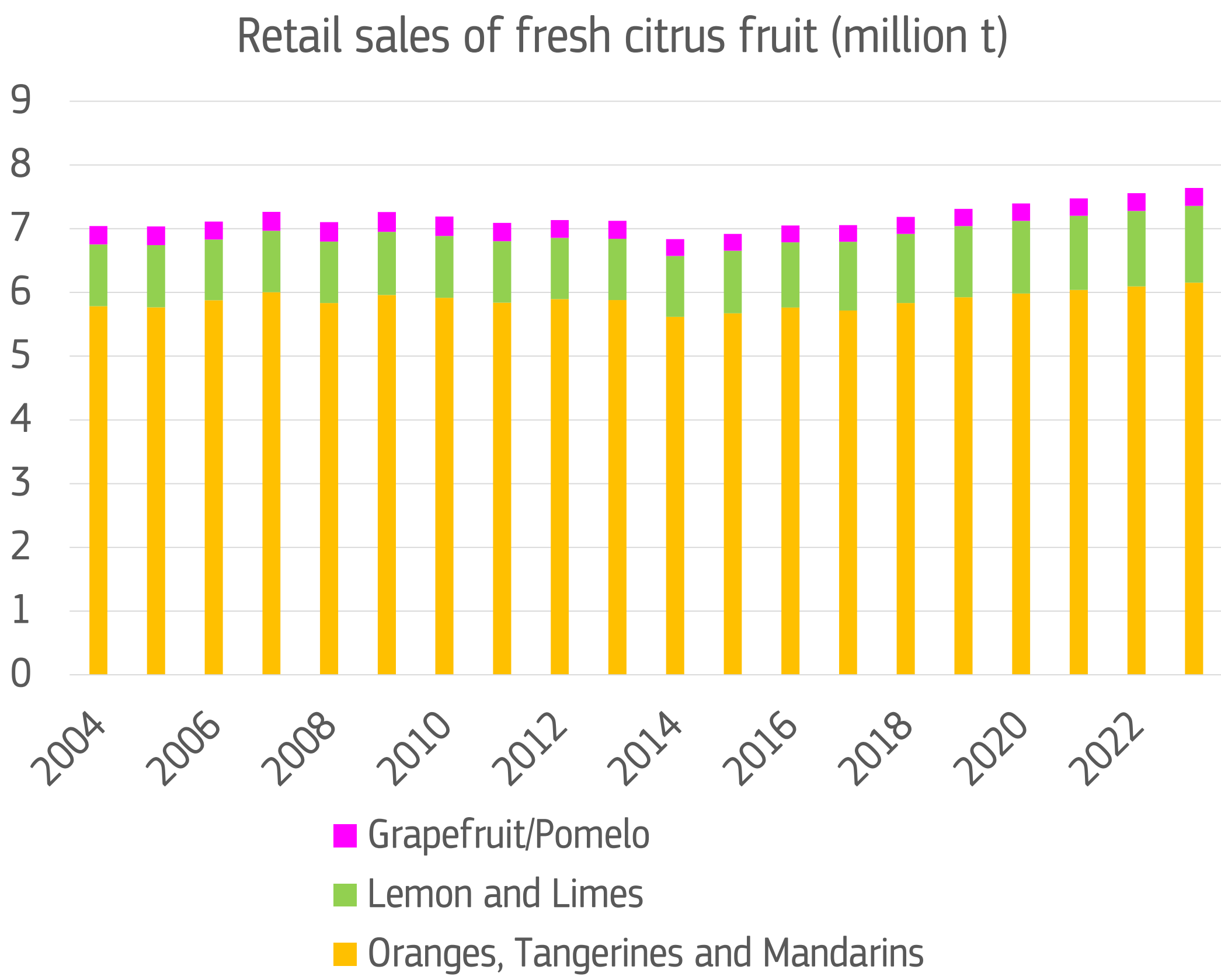
- Diverging trends
 - Decreasing consumption of processed:
from 11 to 8.8 kg/capita (2018 vs. 2030)
 - Increasing consumption of fresh:
from 10.9 to 11.4 kg/capita (2018 vs. 2030)
- Key driver:
 - Switch in juices from concentrates to fresh



Source: DG Agriculture and Rural Development

Consumption

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



Source: Euromonitor