

# AGRICULTURAL OUTLOOK

Pip fruit Market Observatory

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Apples:  
Mid-term Outlook  
2024-35

*#AgriOutlook*



# Medium-Term Outlook: What is it? How? Why?

**WHAT?** Assessment of the likely developments in the current policy framework and under alternative scenarios

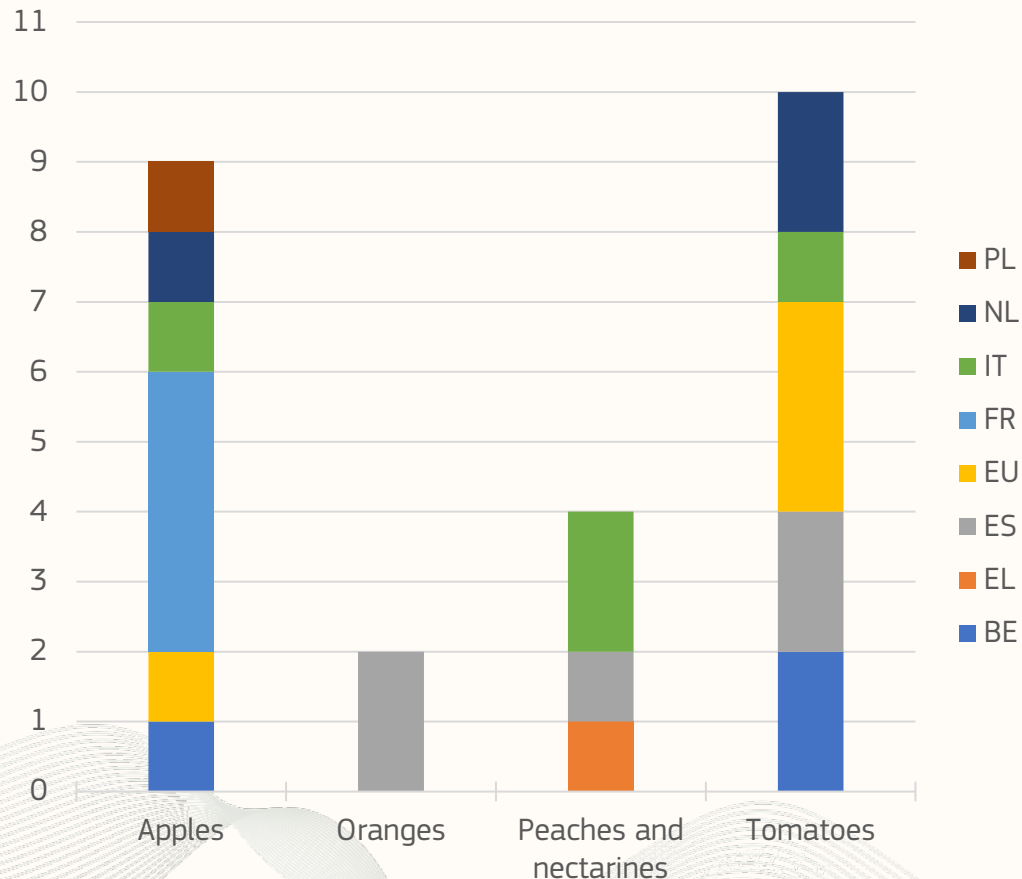
**HOW?** In-house markets' expertise from different units ("outlook groups") and co-operation with JRC + input of external experts via Survey / Outlook workshop / MOs

**WHY?** Support to **an evidence-based policy-making**; used for **impact assessments**

## **APPLES are:**

- included in the MTO since 2016,
- now part of F&V chapter with tomatoes, oranges, and peaches & nectarines
- done in collaboration with AGMEMOD team for a closer look at the supply and use developments for individual EU Member States (next: in 2025).

## MTO 2024 F&V Survey: responses per product and MS

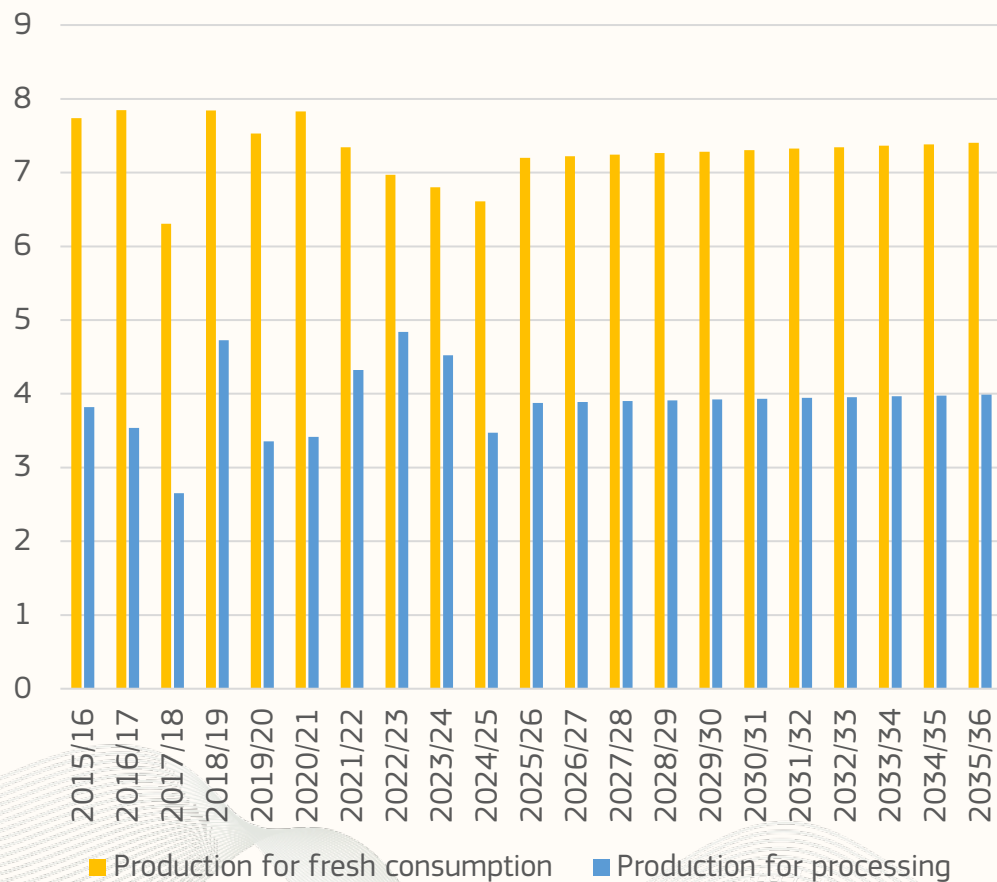


Source: F&V Survey for MTO 2024

# F&V Survey for MTO 2024

- Survey period: July-August 2024
- Questions on:
  1. Drivers
  2. Developments in the next 10 years
- Total number of replies: 25
- Replies for apples: 9
- Member states represented for apples: 5 (+ EU)

EU27 Apple production (million t)



Source: DG Agriculture and Rural Development (draft baseline 2024)

# Apples: Production

## Drivers:

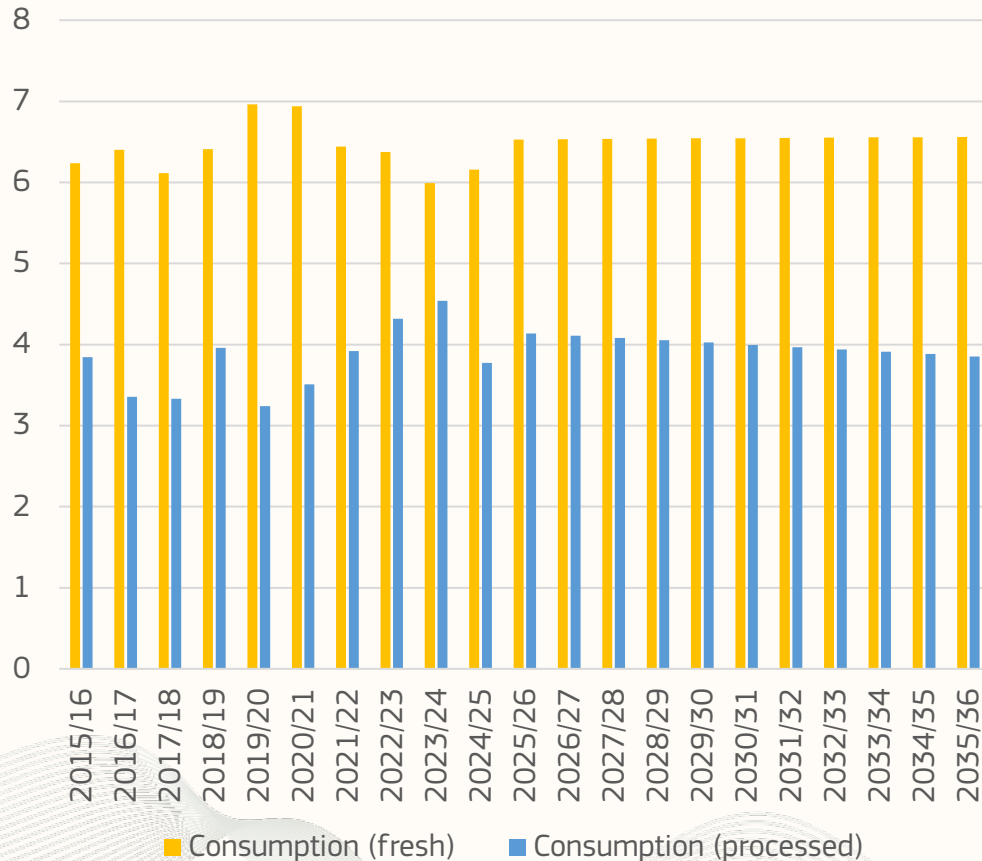
1. climate & weather
2. availability of PPPs and water
3. new varieties / NGTs
4. labour shortage / generational change

## Projections:

- **Area** : -0.5% p.a. (from 492 thousand ha in 2019/20-2023/24 to 465 thousand ha in 2035/36)
- **Yield**: +0.4% p.a. (from 24.8 t/ha to 26.0 t/ha)
- **Total usable production**: unchanged (11.4 million t)
- **Production for fresh consumption**: +0.1% p.a. (from 7.3 million t to 7.4 million t)
- **Production for processing**: -0.2% p.a. (from 4.1 million t to 4.0 million t)

# Apples: Consumption

EU27 Apple consumption (million t)



Source: DG Agriculture and Rural Development (draft baseline 2024)

## Drivers:

1. consumer prices (too high),
2. better quality / adapted varieties / promotion
3. communication of health benefits
4. Shift from Fresh to Processed

## Projections:

- New varieties may sustain fresh consumption.
- Consumption (fresh): unchanged (6.6 million t), per capita consumption: 14.7 kg/year
- Consumption for processing: -0.1% p.a. (from 3.92 million t in 2019/20-2023/24 to 3.85 million t in 2035/36)

# Apples: Exports

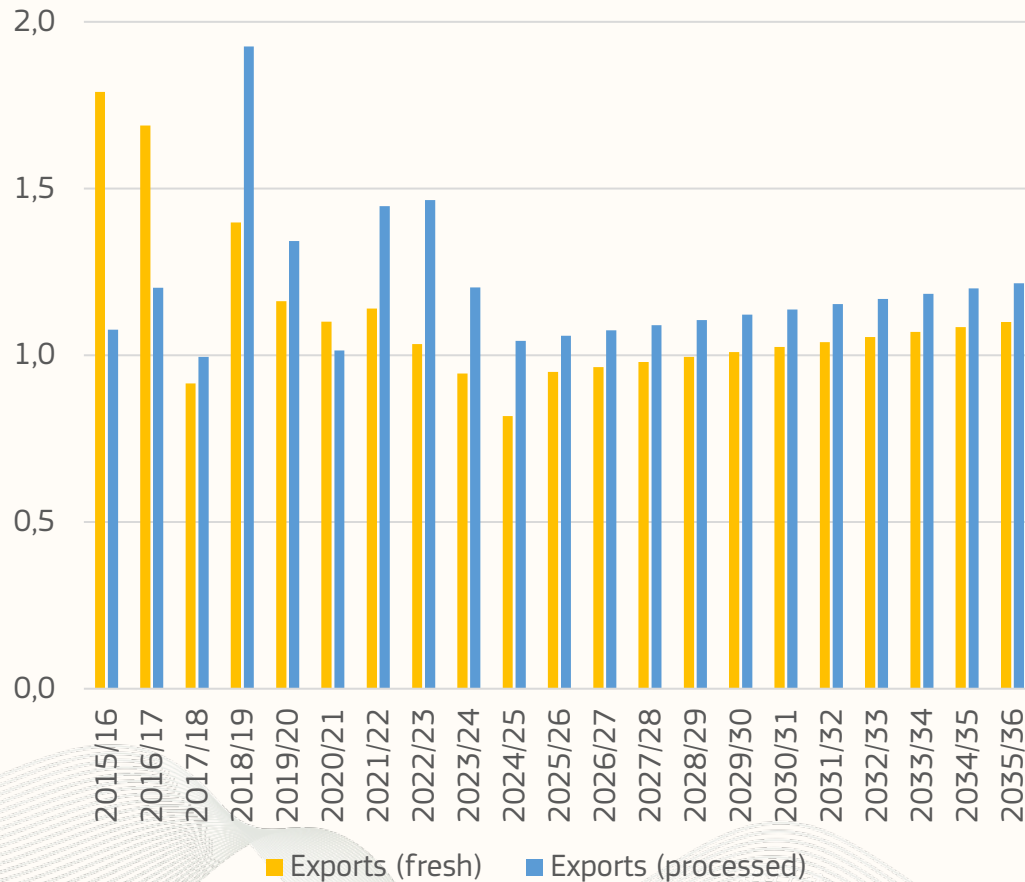
## Drivers:

1. geopolitical situation / stability,
2. (re)opening of export markets,
3. quality & product segmentation.

## Projections:

- **Exports of fresh apples: +0.1% p.a.** (from 1.09 million t in 2019/20-2023/24 to 1.10 million t in 2035/36)
- **Exports of processed apples: -0.8% p.a.** (from 1.33 million t in 2019/20-2023/24 to 1.22 million t in 2035/36)

EU27 Apple exports (million t)



Source: DG Agriculture and Rural Development (draft baseline 2024)



# Apples: Imports

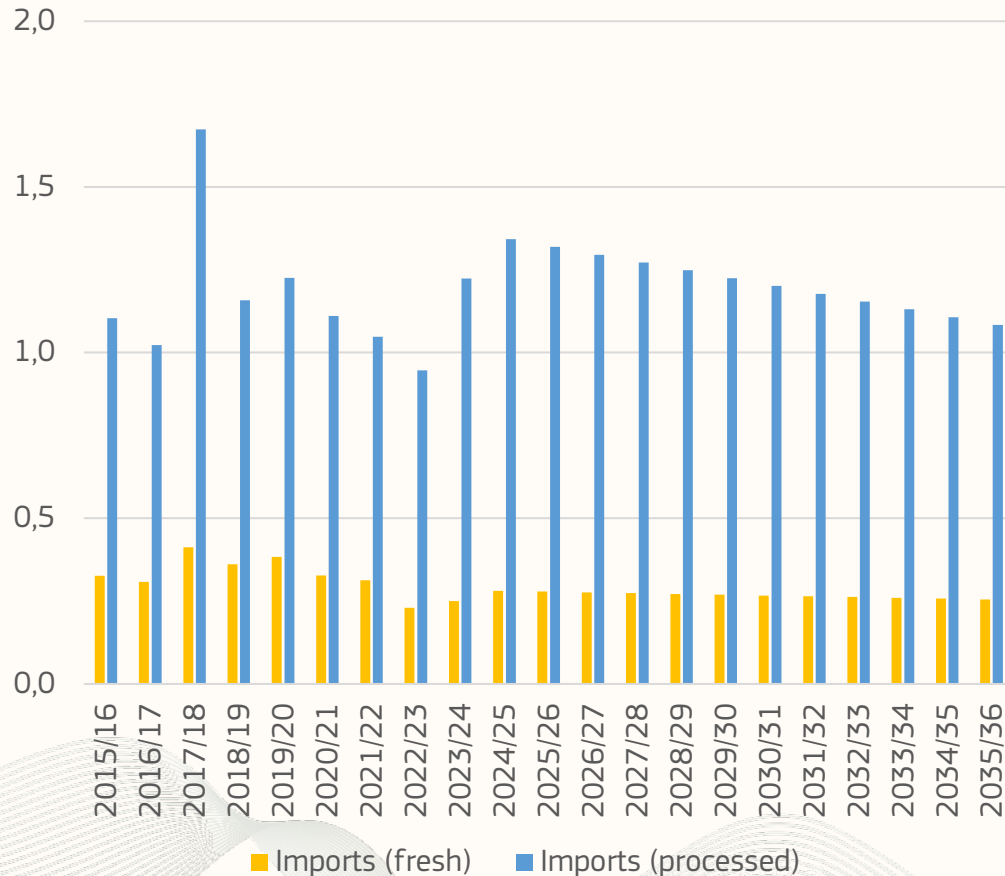
## Drivers:

- Preference for EU apples vs imported apples
- Off-season imports
- Geopolitical situation / stability
- Market access (FTAs)

## Projections:

- **Imports of fresh apples: -1.2%** (from 0.3 million t in 2019/20-2023/24 to 0.26 million t in 2035/36)
- **Imports of processed apples -0.3% p.a.** (from 1.13 million t in 2019/20-2023/24 to 1.08 million t in 2035/36)

EU27 Apple imports (million t)



Source: DG Agriculture and Rural Development (draft baseline 2024)

Thank You