

AGRICULTURAL OUTLOOK

Citrus Fruit Market Observatory

Oranges:
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

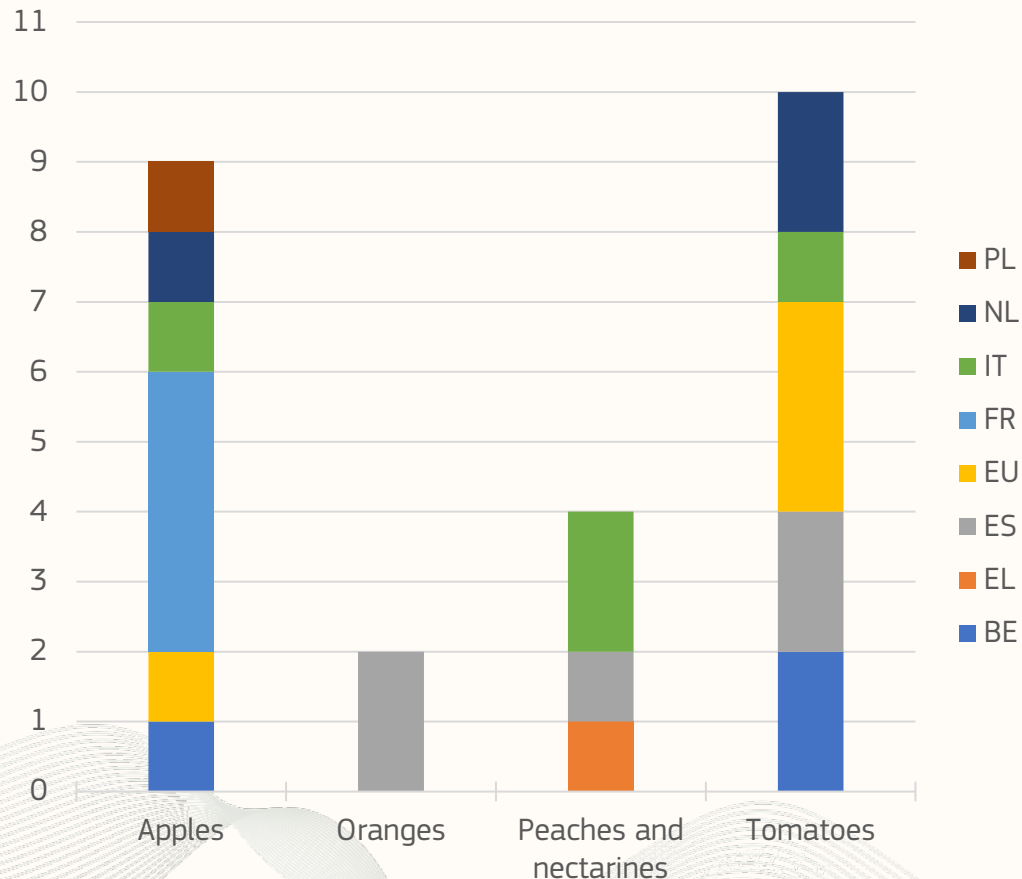
HOW? In-house markets' expertise from different units ("outlook groups") and co-operation with JRC + input of external experts via Survey / Outlook workshop / MOs

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

ORANGES are:

- included in the MTO since 2019,
- now part of F&V chapter with tomatoes, apples 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 for oranges: in 2025).

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

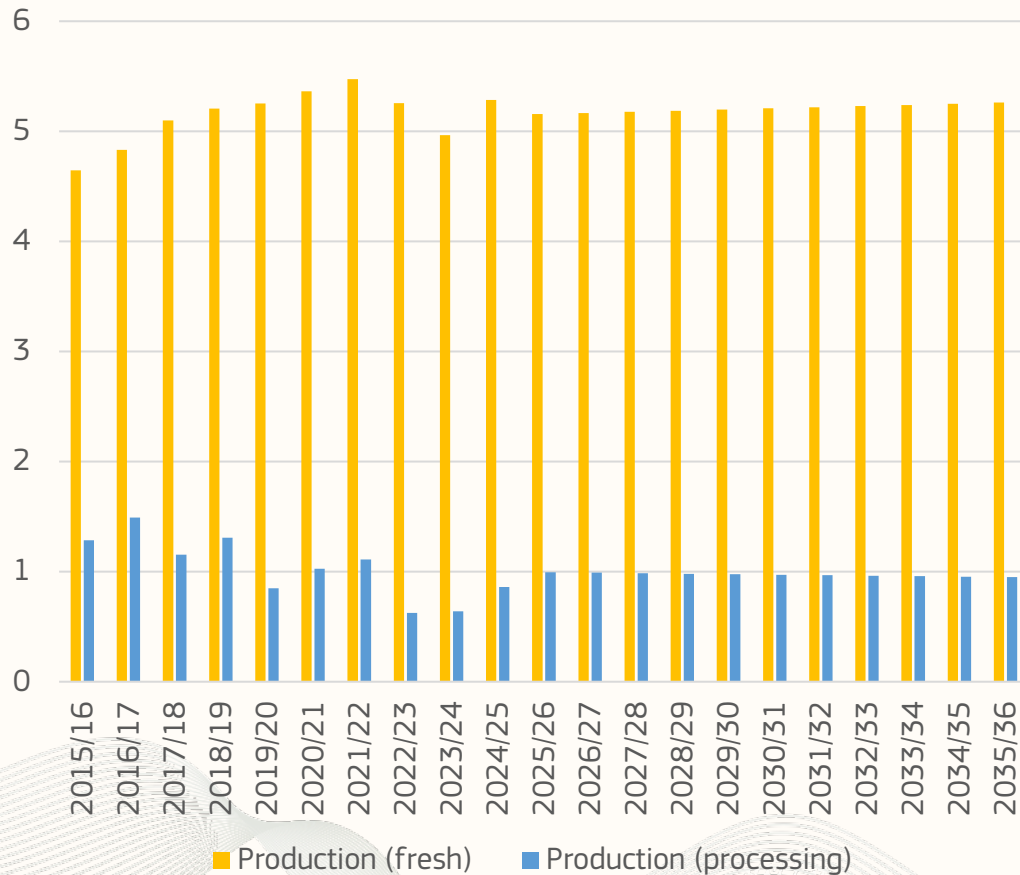


Source: F&V Survey for MTO 2024

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 oranges: 2
- Member states represented for oranges: Spain

EU27 Orange production (million t)



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

Oranges: Production

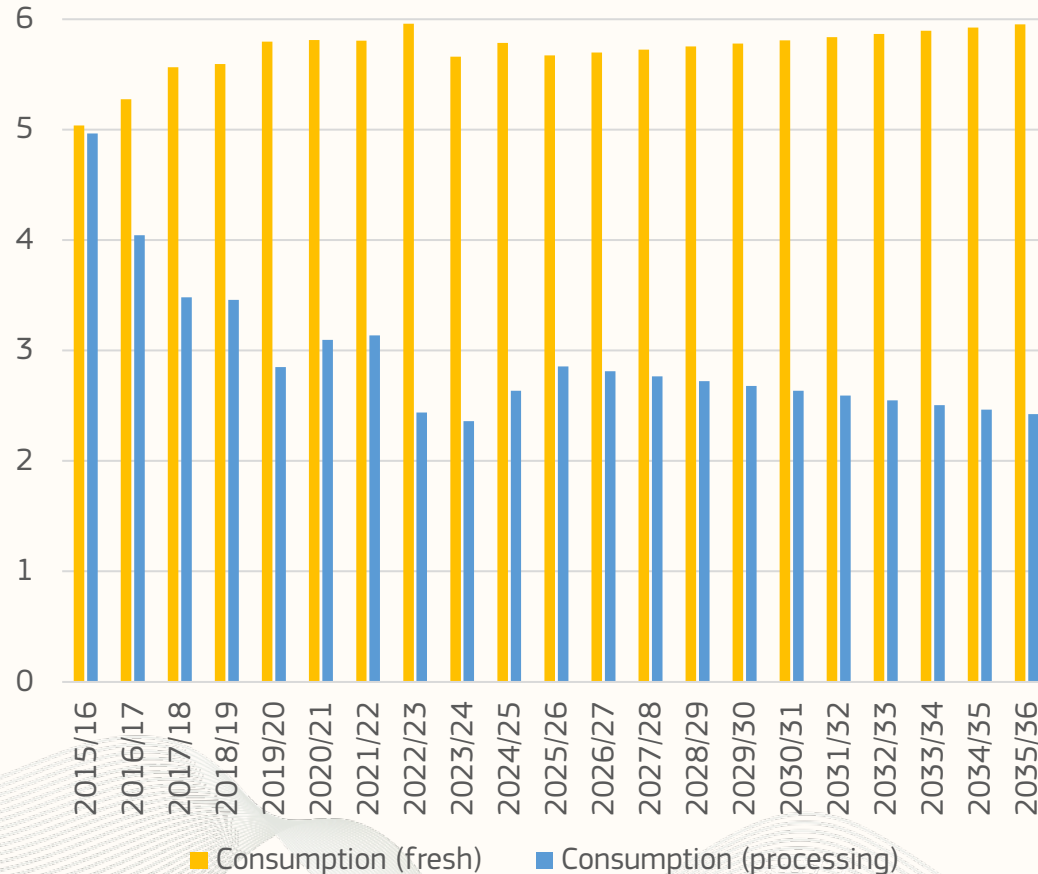
Drivers:

1. Growth and industrialization of farms
2. Availability of PPPs and water
3. Climate change / weather extremes
4. Market conditions / economic viability
5. Innovation

Projections:

- **Area** : unchanged (at 276 thousand ha in 2035/36)
- **Yield**: +0.1% p.a. (from 22.3 t/ha in 2019/20-2023/24 to 22.5 t/ha in 2035/36)
- **Production (fresh)**: unchanged (at 5.3 million t)
- **Production (processing)**: +1.1% p.a. (from 0.84 million t in 2019/20-2023/24 to 0.95 million t in 2035/36)

EU27 Orange consumption (million t)



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

Oranges: Consumption

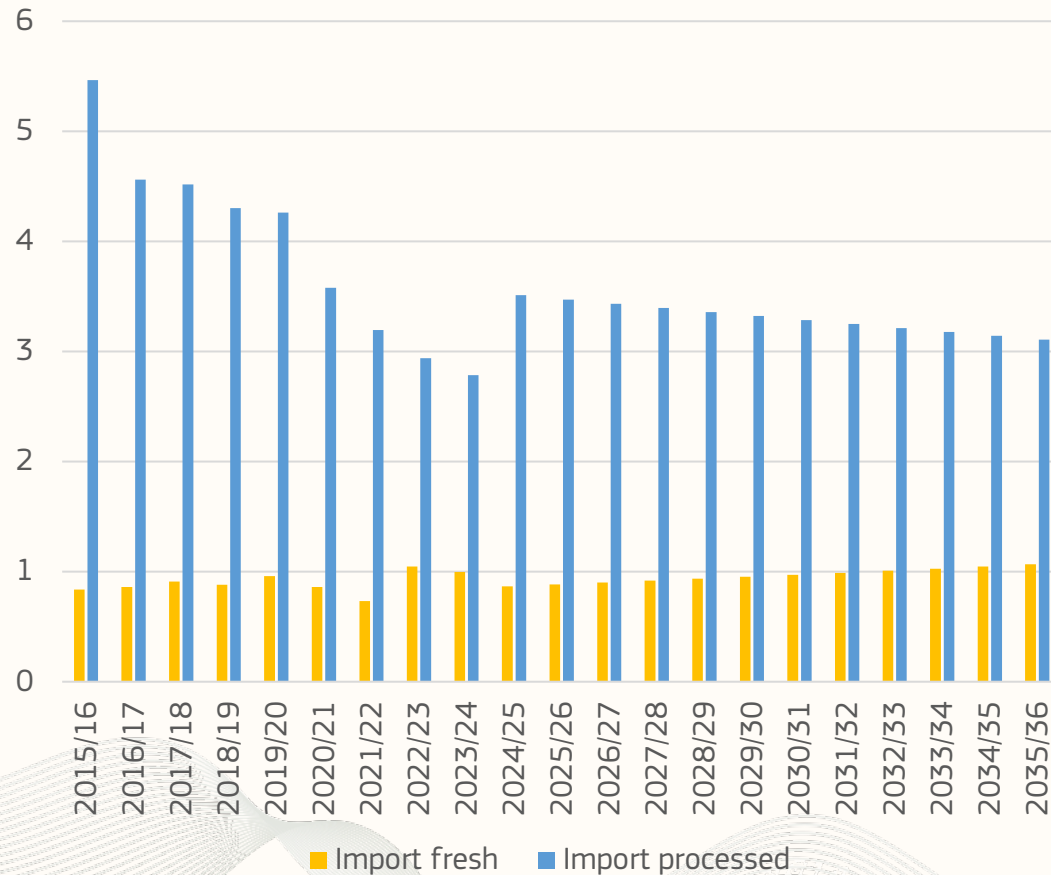
Drivers:

1. Communication of health benefits
2. Consumer prices (too high),
3. Better quality / adapted varieties / promotion
4. Shift to younger consumers

Projections:

- **Consumption (fresh): +0.2% p.a.** (from 5.81 million t in 2019/20-2023/24 to 5.96 million t in 2035/36), per capita: +0.3 kg/year to 13.3 kg/year
- **Consumption for processing: -1.3% p.a.** (from 2.80 million t in 2019/20-2023/24 to 2.42 million t in 2035/36)

EU27 Orange imports (million t)



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

Oranges: Imports

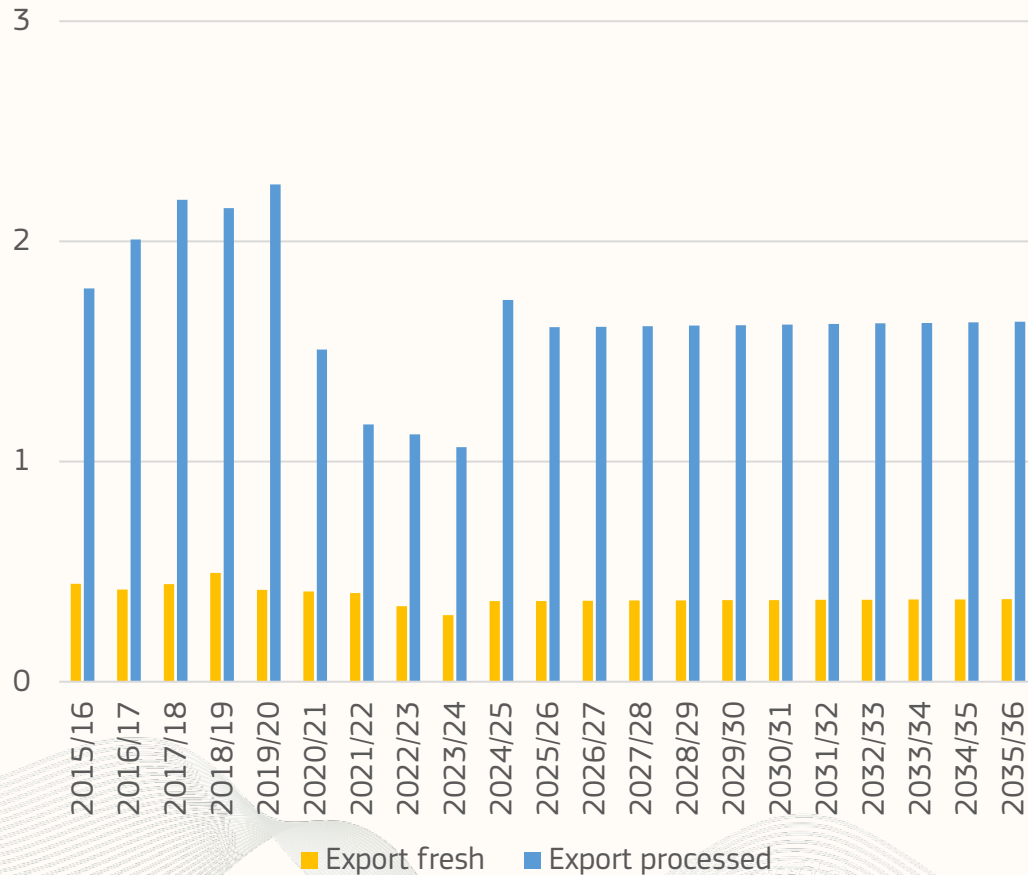
Drivers:

- EU market requirements (regulatory)
- Trade liberalisation
- Product specialisation

Projections:

- **Imports of processed oranges -0.4% p.a.** (from 3.24 million t in 2019/20-2023/24 to 3.11 million t in 2035/36)
- **Imports of fresh oranges: +1.2%** (from 0.94 million t in 2019/20-2023/24 to 1.07 million t in 2035/36)

EU27 Orange exports (million t)



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

Oranges: Exports

Drivers:

1. Trade liberalisation
2. Export supply chain improvements

Projections:

- **Exports of processed oranges: +2.3% p.a.** (from 1.27 million t in 2019/20-2023/24 to 1.64 million t in 2035/36)
- **Exports of fresh oranges: -0.3% p.a.** (from 0.39 million t in 2019/20-2023/24 to 0.38 million t in 2035/36)

Thank You