



The 2018 EU Agricultural Outlook Conference

THE FUTURE OF FOOD AND FARMING

FOOD FOR THOUGHT

EU agricultural outlook for wine, olives
and fruit and vegetables

Brussels, 6 -7 December 2018



What do I put in his picnic basket now?

Decisions get more complex

Taste preferences

Quality

Price

Lifestyle changes

Health concerns

Convenience

Environmental concerns



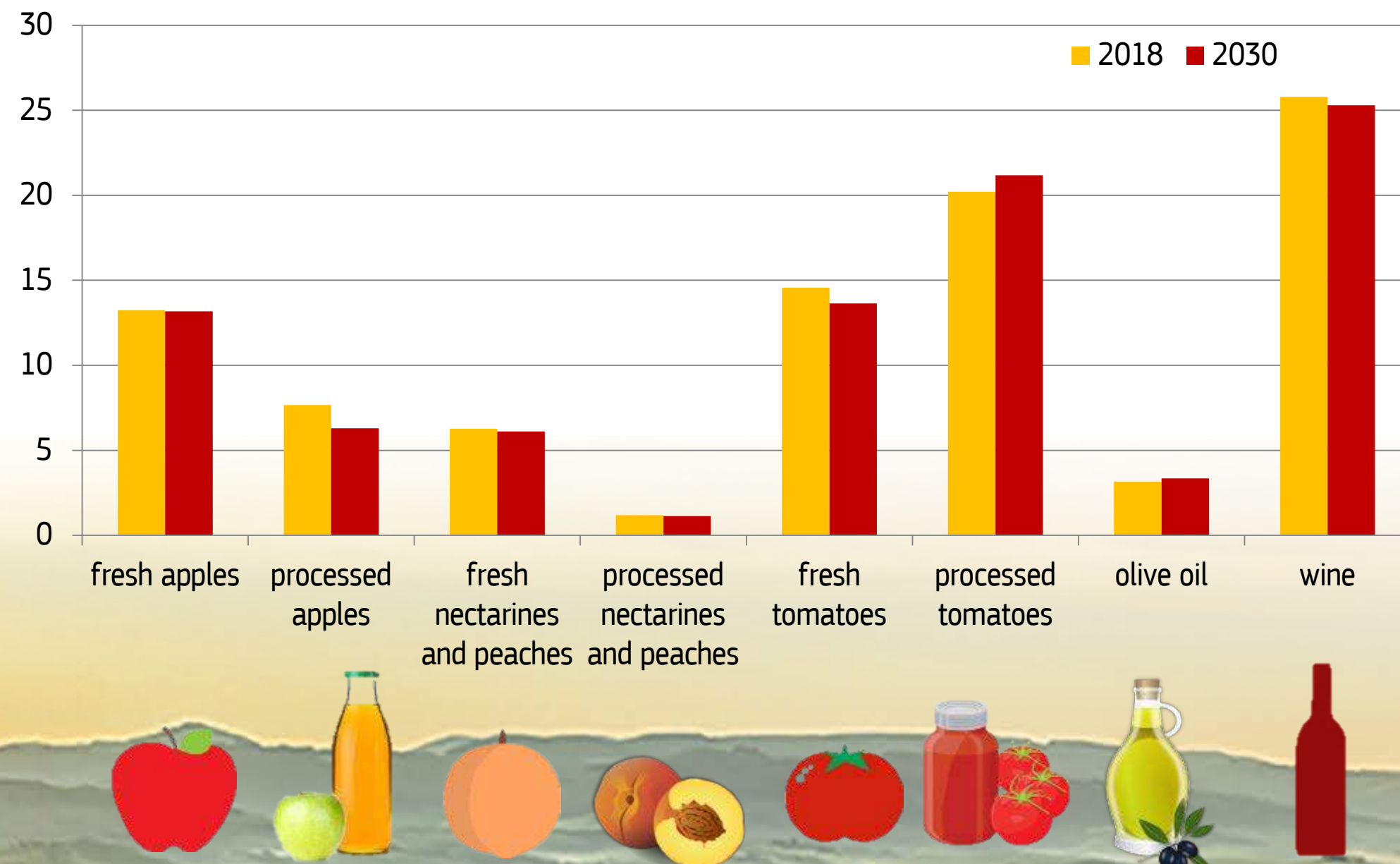
European
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Rural Development

How will the demand change?

New varieties and more focus on value added products

Per capita consumption in the EU in 2018 and 2030* (kg/litre per capita)



Value added

- **Convenience** food or packaging
- **Diversification**

Geographical indications



Organic production



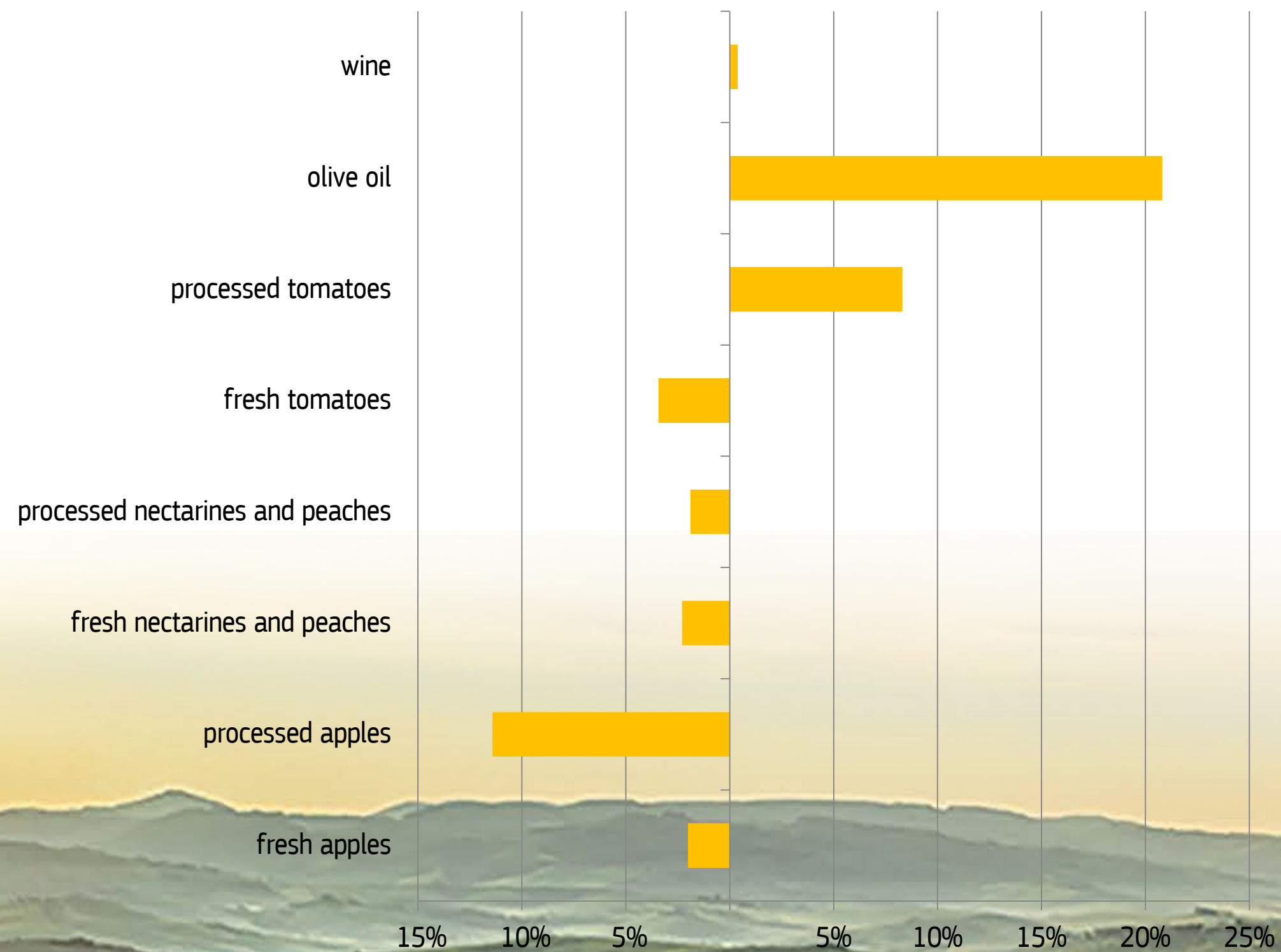
- **Apples** 6% of area (+3% in conversion)
- **Wine** 9% of area IN 2030: ?

*Given the high variability of production, projections are compared to the 5-year trimmed average

How will production change?

Ongoing modernisation and improved efficiency

Change of EU production 2030/2018*



Biocontrol to play **an increasing role...**



Source: COEXPHAL

*Given the high variability of production, projections are compared to the 5-year trimmed average



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Question for the audience

Go to [slido.com](https://www.slido.com) - event code [#AgriOutlook](https://www.slido.com/join/AgriOutlook)

What is the share of biocontrol in greenhouse grown tomatoes?

1. **5-10 %**
2. **40—50 %**
3. **95-100 %**



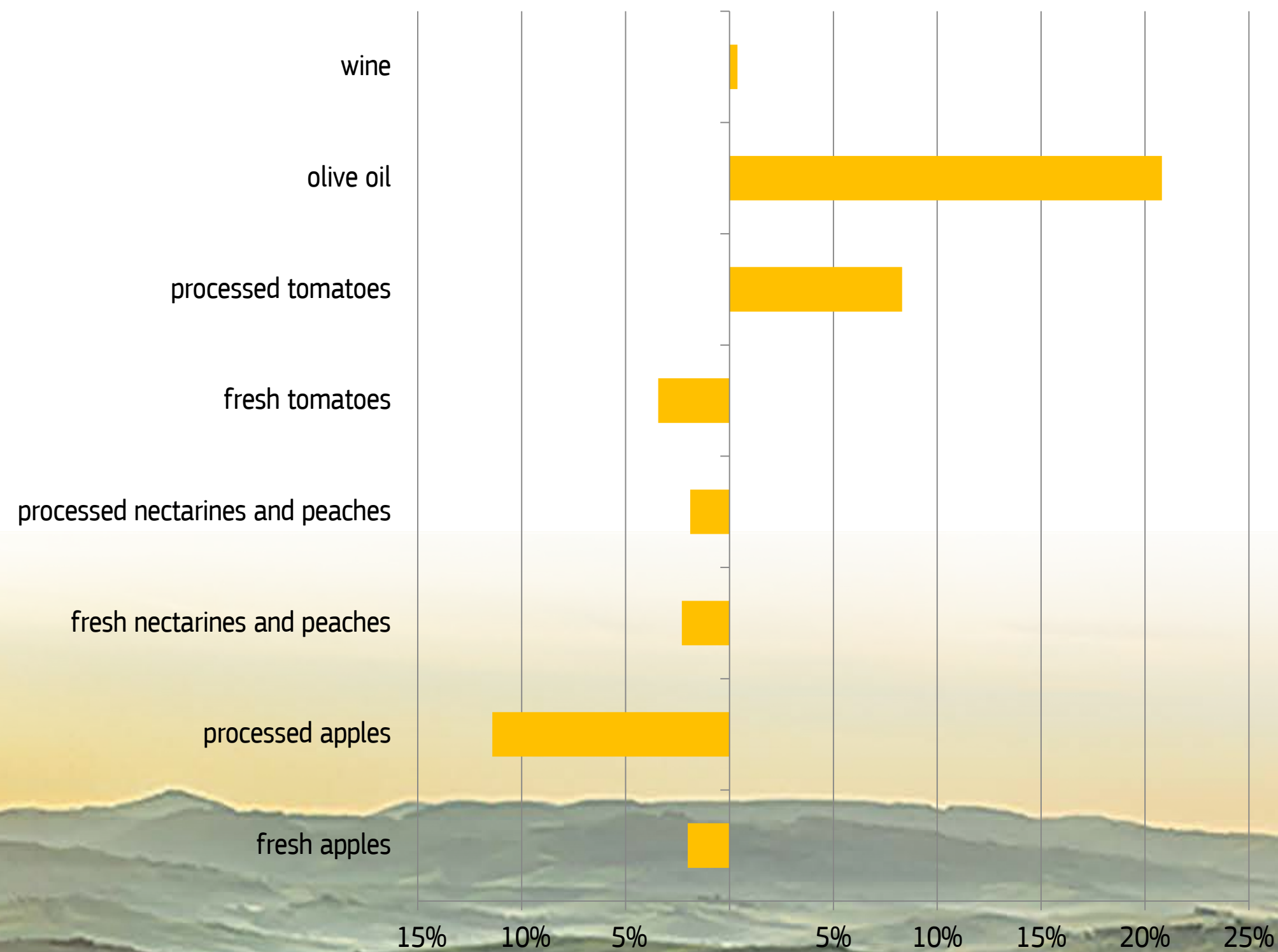
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How will production change?

Ongoing modernisation and improved efficiency

Change of EU production 2030/2018*





- **Concentration** of production
- Investment into **irrigation production systems**




- **Restructuring** of sector
- **New varieties**



- **Restructuring** of sector
- **Improved quality**



- **Grubbing up of old vineyards**
- **Concentration** of production
- **Increase in GI** areas



- **Intensified** production
- **Extension** of production seasons

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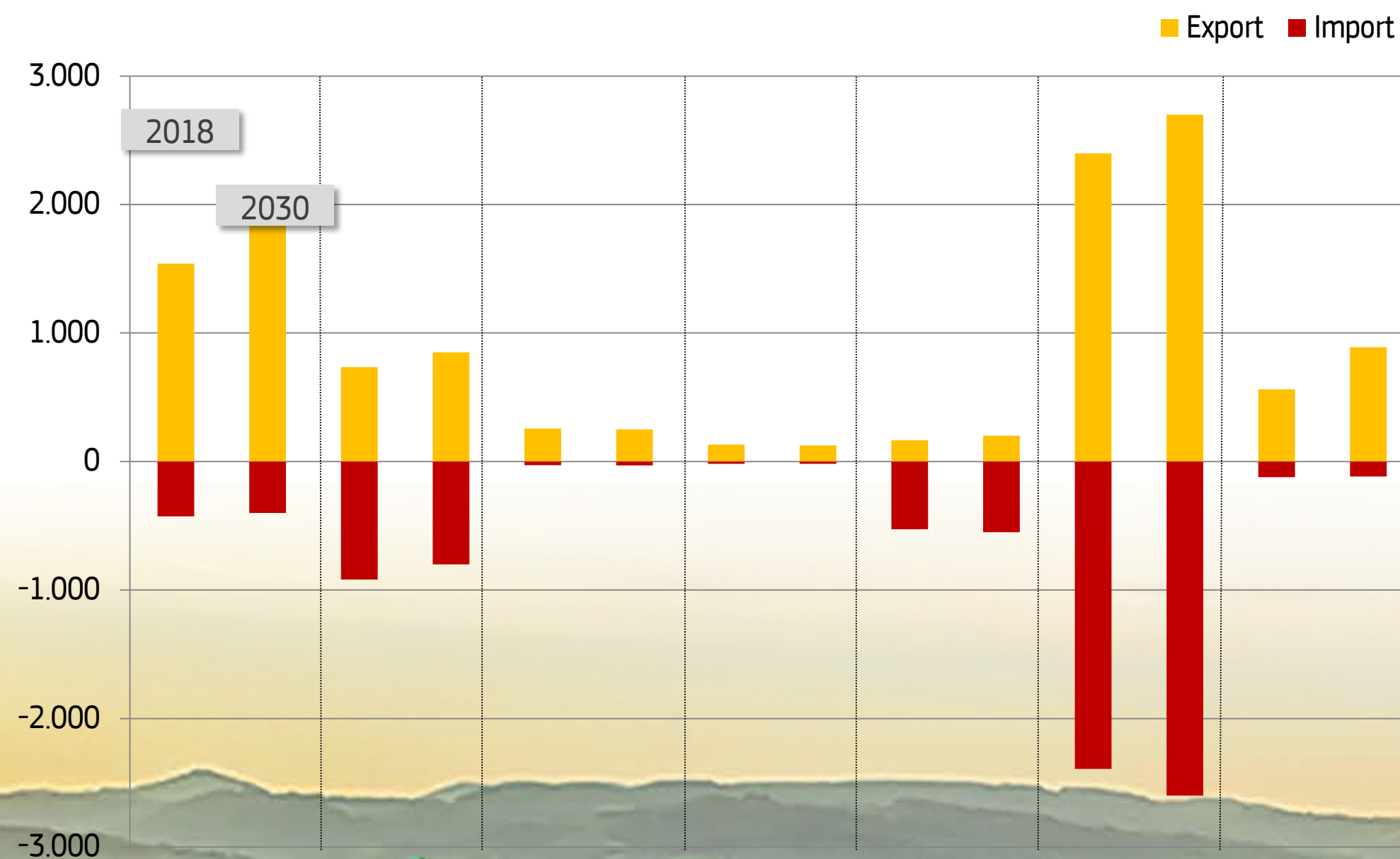
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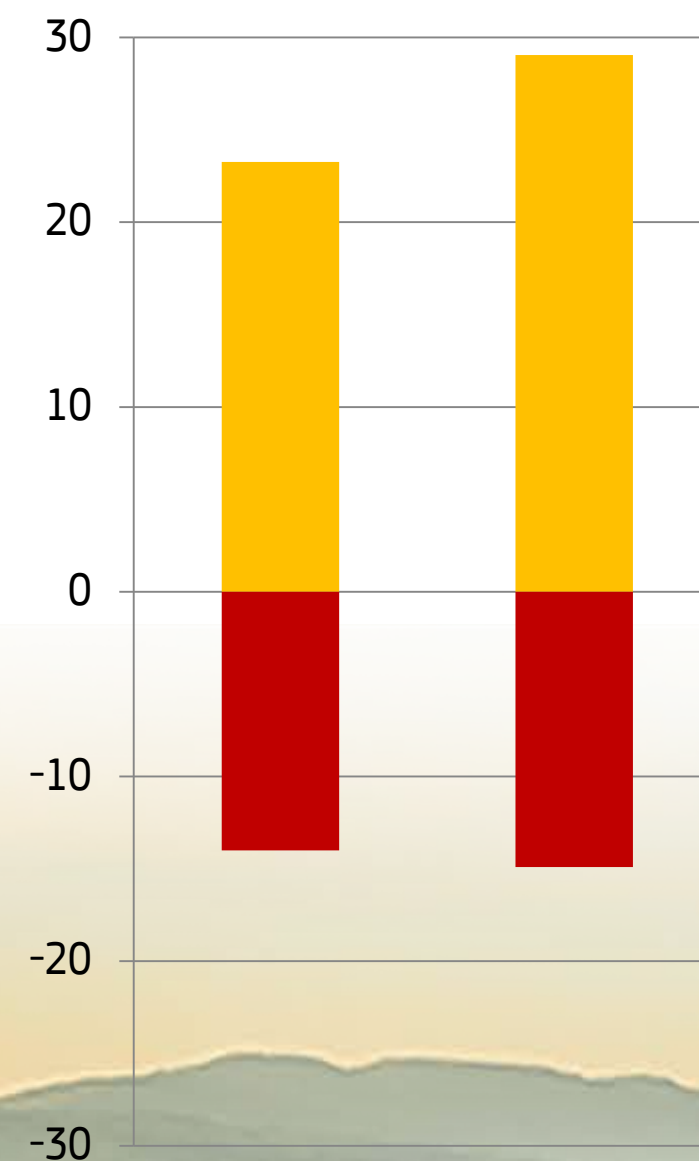
Where will the products come from?

Reinforced net export position in several sectors

Net trade in 2018* and 2030
(1 000 t)



Net trade in 2018* and 2030
(million hectolitres)



Driven by:

- Strong global demand for **olive oil**
- Strong demand for **sparkling wines** and **wine with GI**

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