AGRICULTURAL OUTLOOK

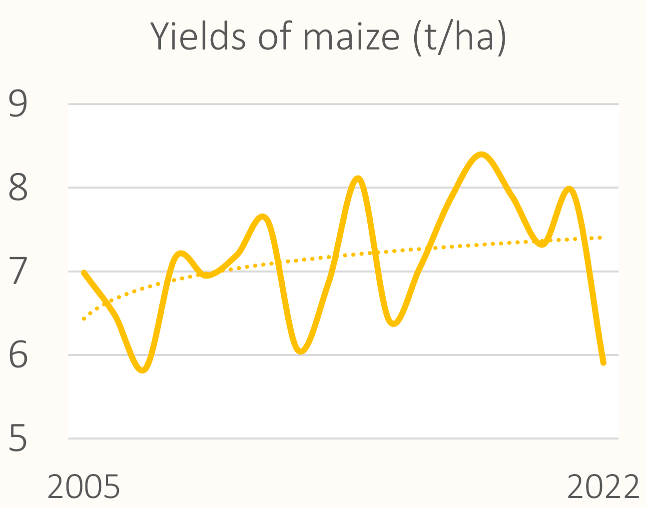
Sowing the Future of EU Agriculture

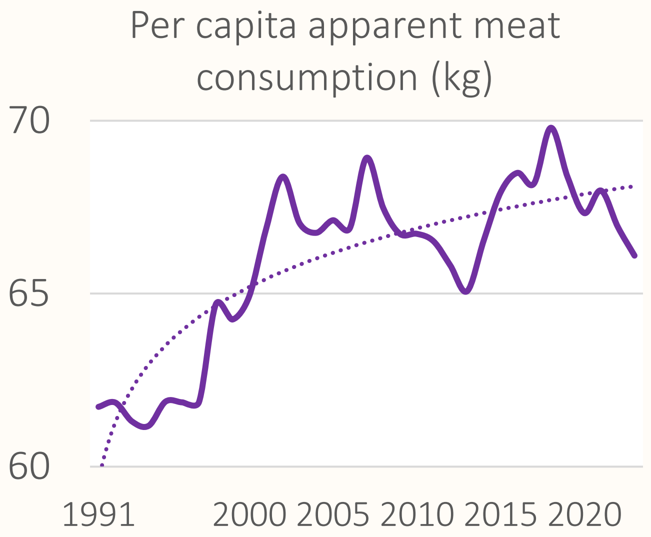
Where we are, and where we are heading to

Presentation of EU Agricultural Outlook (2023-2035)

European Commission

Major supply and demand challenges and opportunities





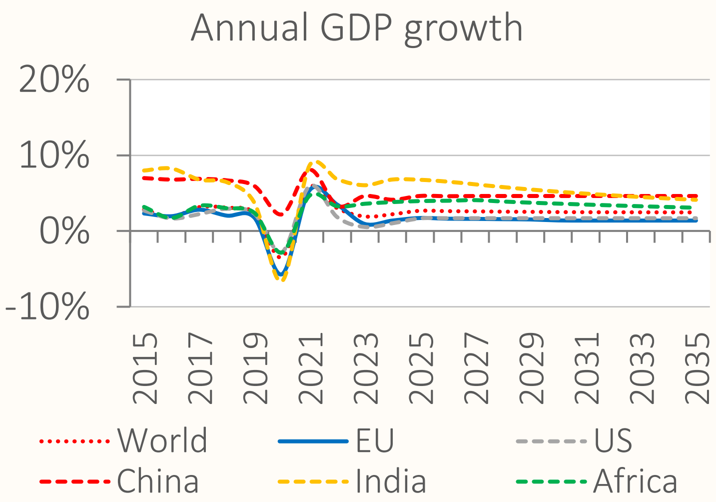
Frequent and more severe impacts of climate change

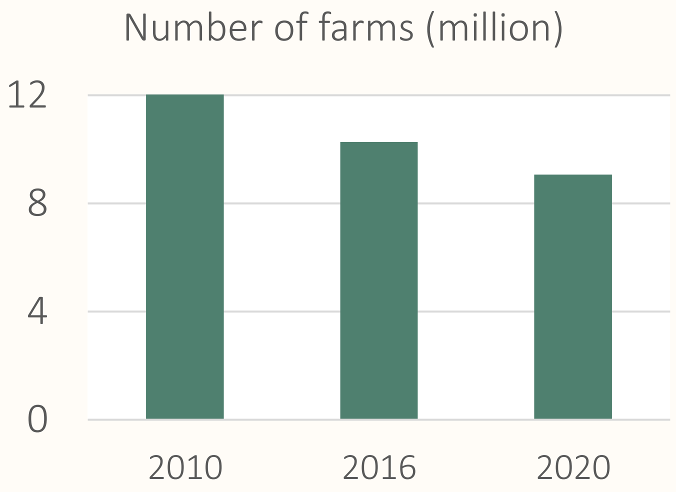
(less predictable, higher production variability, regionally differentiated impacts, water scarcity, increasing competition for water)

Changing consumer preferences, concerns and habits

(more conscious and value-oriented consumers, but price shocks could quickly change the patterns – less predictable)

… in changing macroeconomic and farming environment





Dynamically changing macroeconomic environment

(less predictable, from global into regional relations, demographic and economic changes)

Evolving structure of EU farming sector

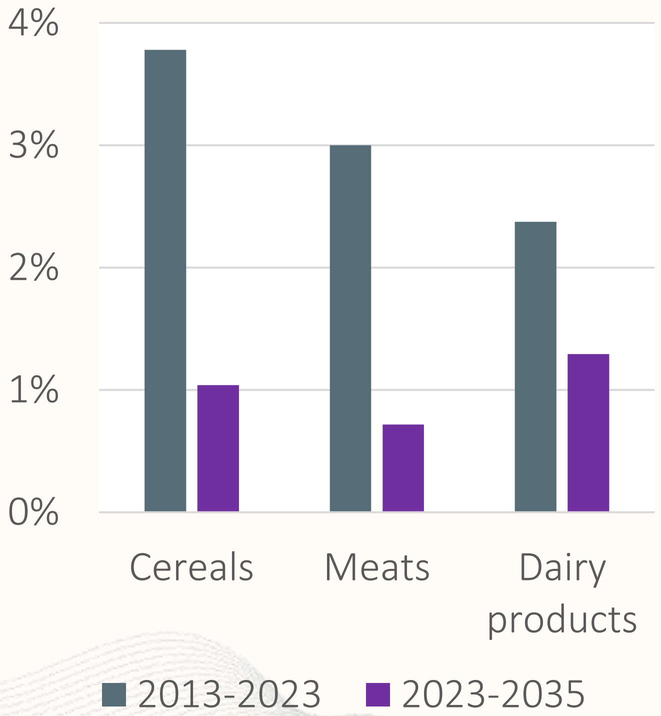
(larger, more specialised and intensive farms, increasing productivity, gaps between Member States remain)

GLOBAL DEMAND AND THE EU POSITION

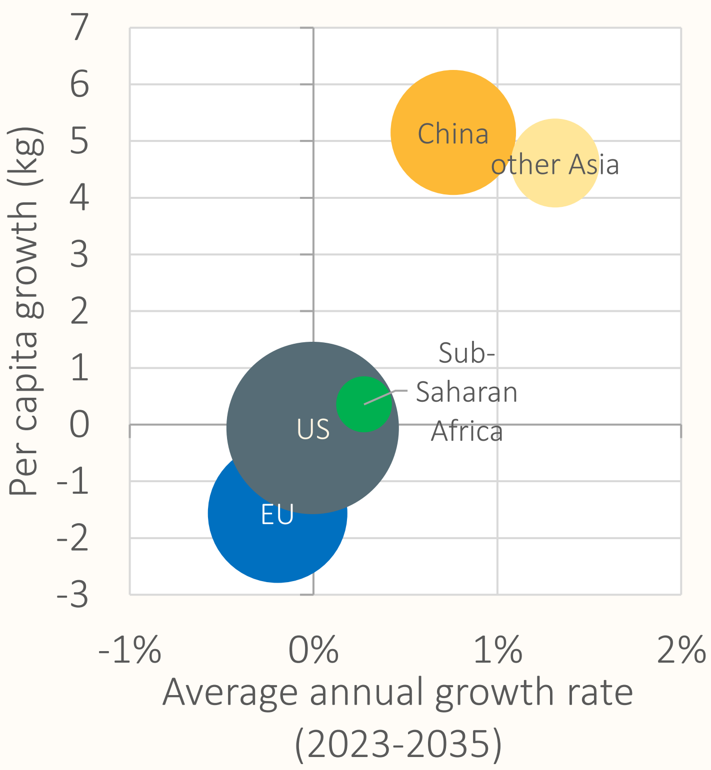
European Commission

Demand is growing outside the EU

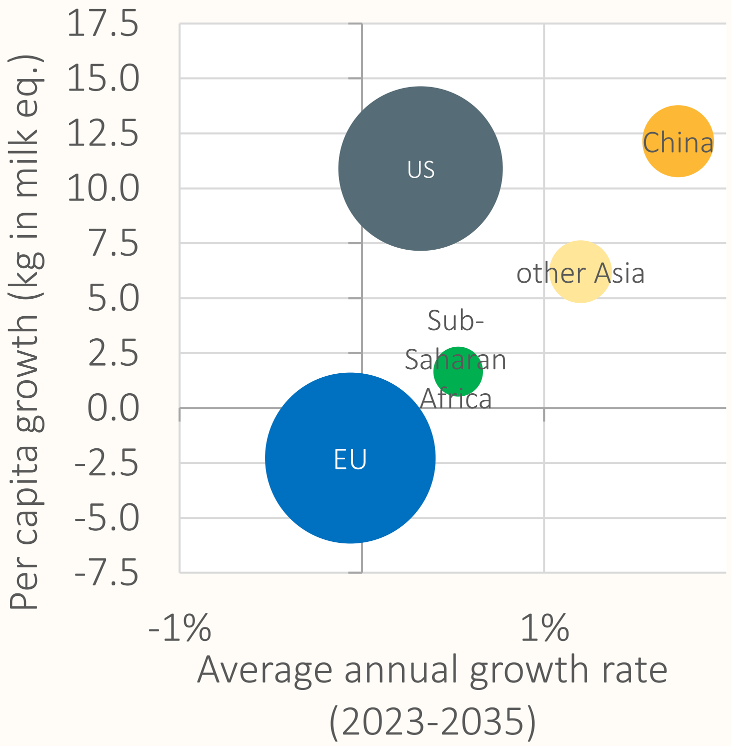
Average annual growth rate of global imports



Meat consumption



Dairy products consumption



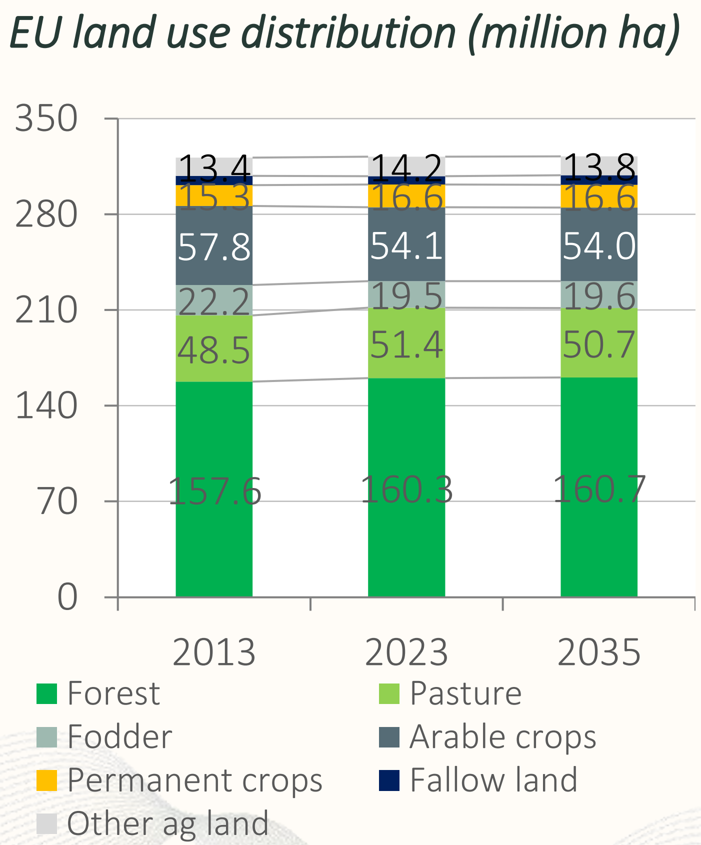
*Sizes of bubbles correspond to an average per capita consumption in 2021-2023

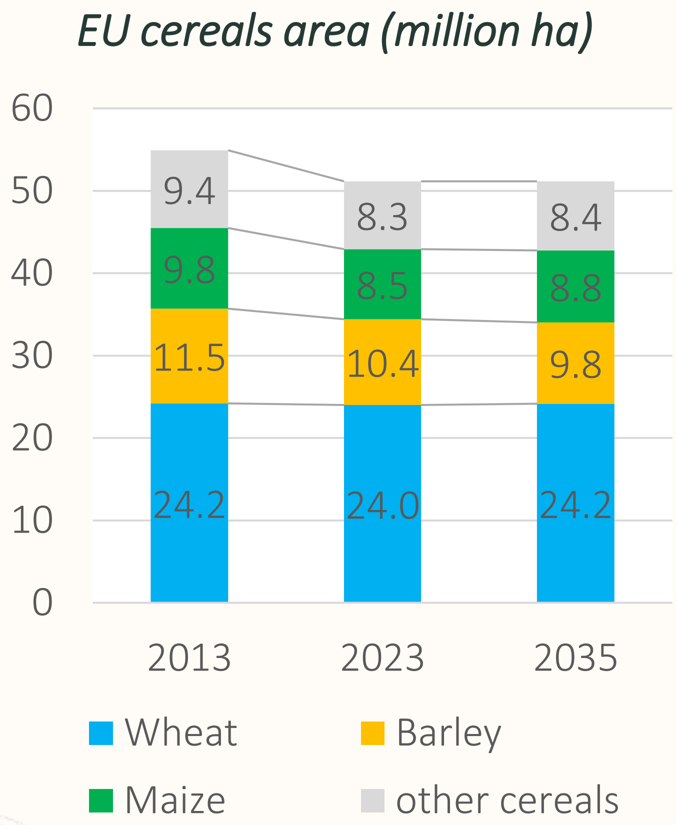
** "other Asia" includes countries other than China and Japan

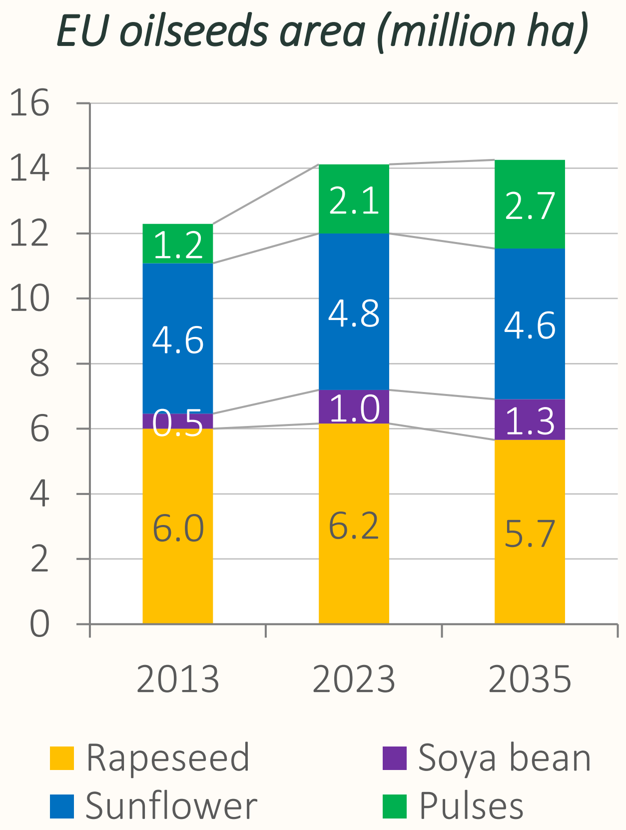
European Commission

FOCUS ON EU CROP PRODUCTION

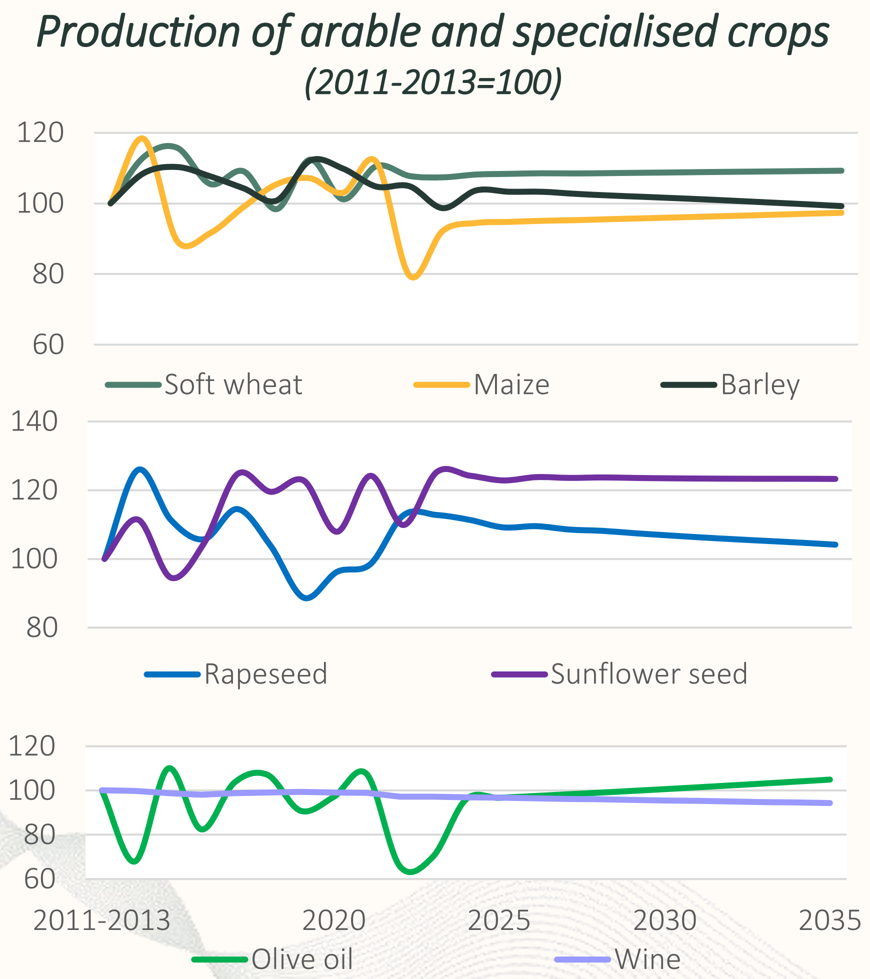
Changing demand behind the distribution of land

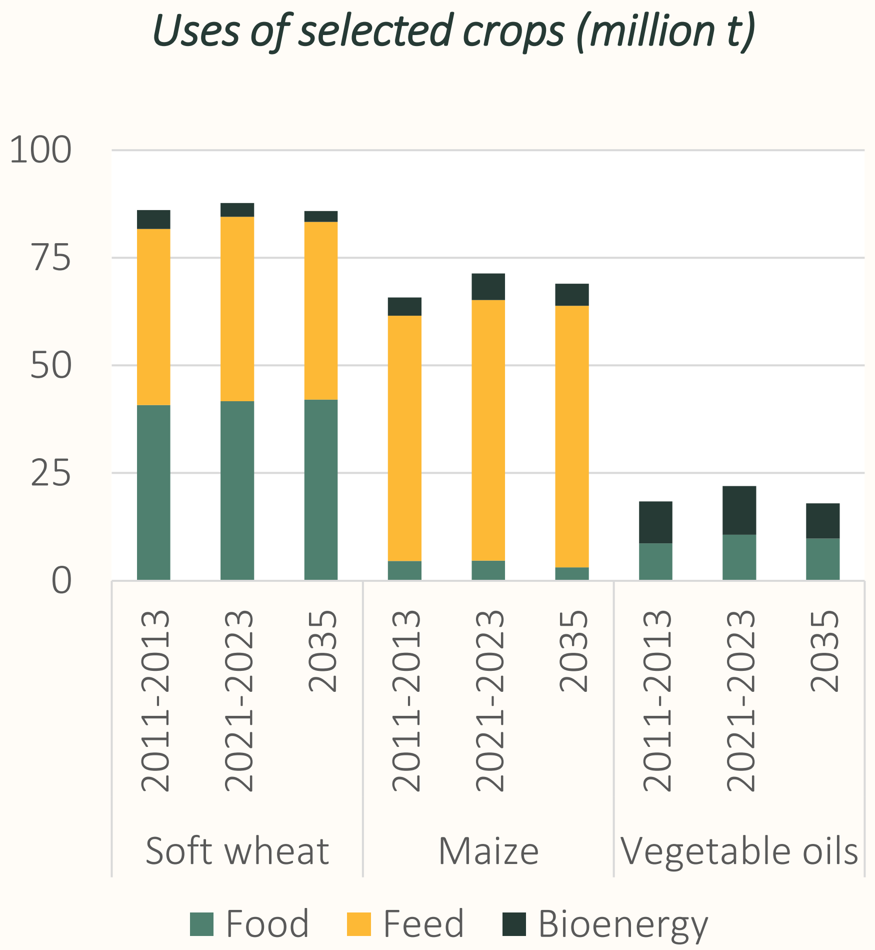






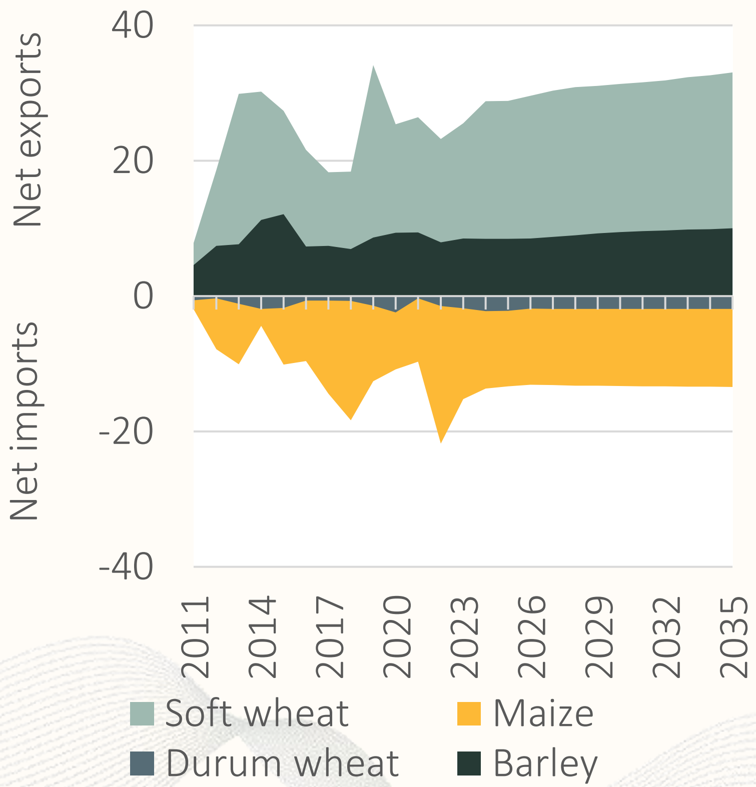
Lower demand for feed and vegetable oils



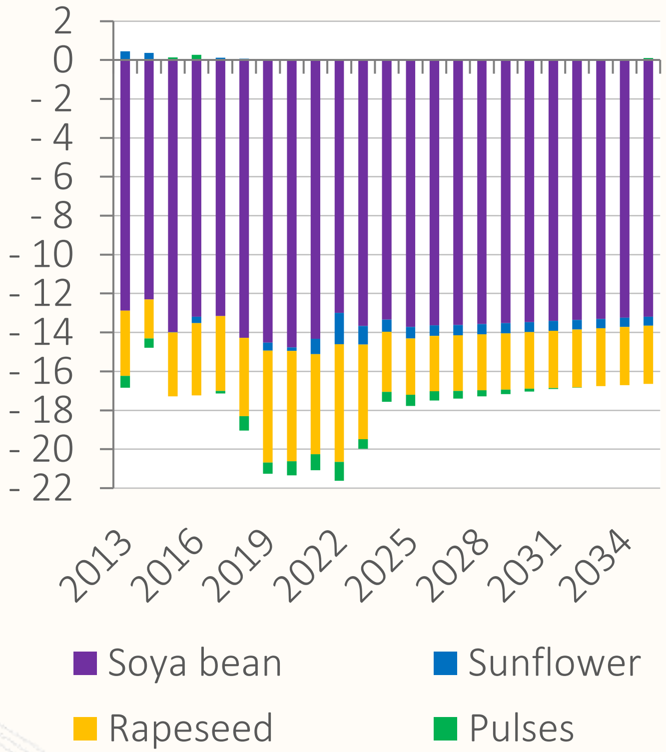


Improving EU net trade positions

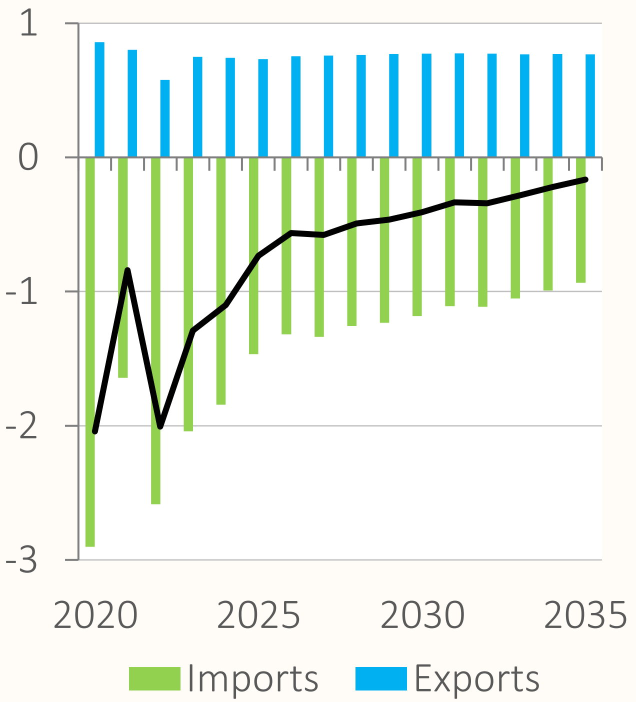
Net trade of cereals (million t)



Net trade of oilseeds (million t)



Net trade of sugar (million t)

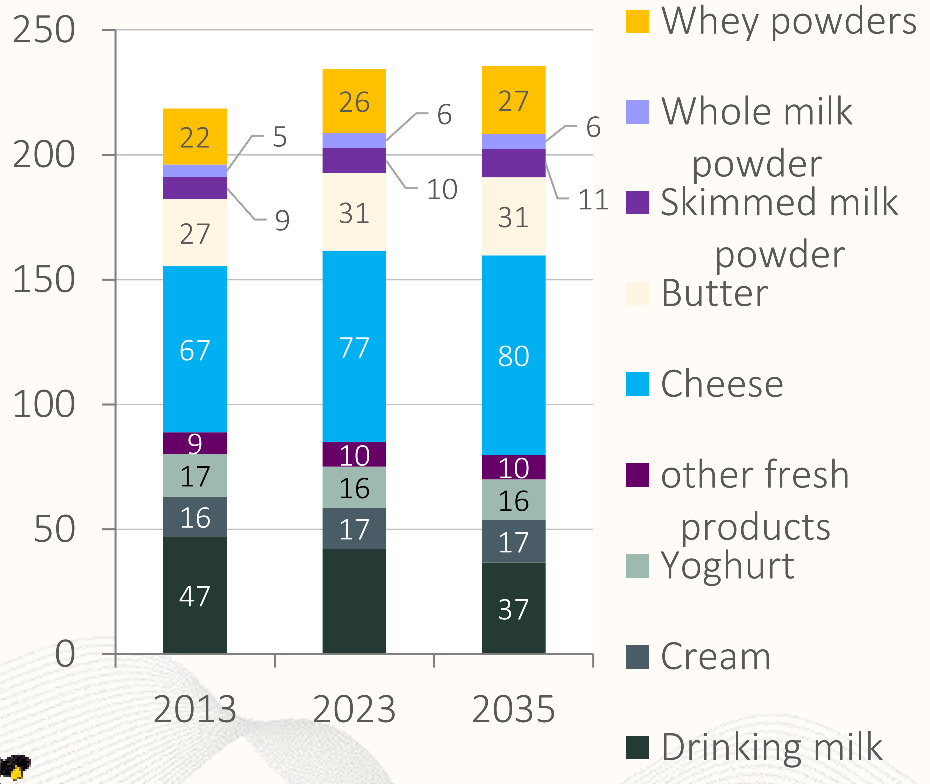


FOCUS ON EU ANIMAL PRODUCTION

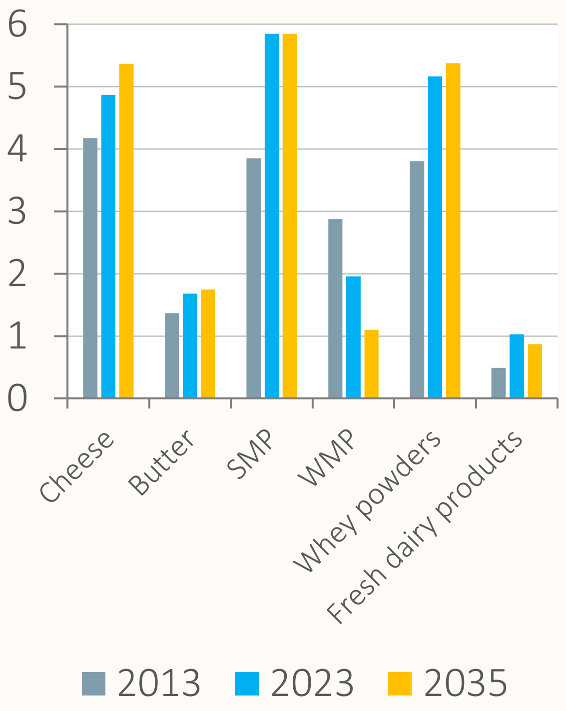
European Commission

Saturated dairy consumption

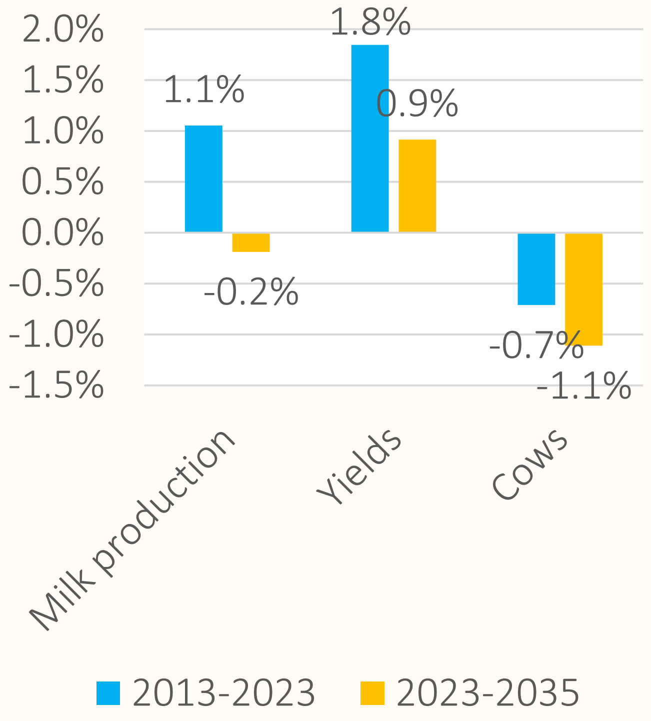
EU per capita consumption of dairy products (kg of milk eq.)



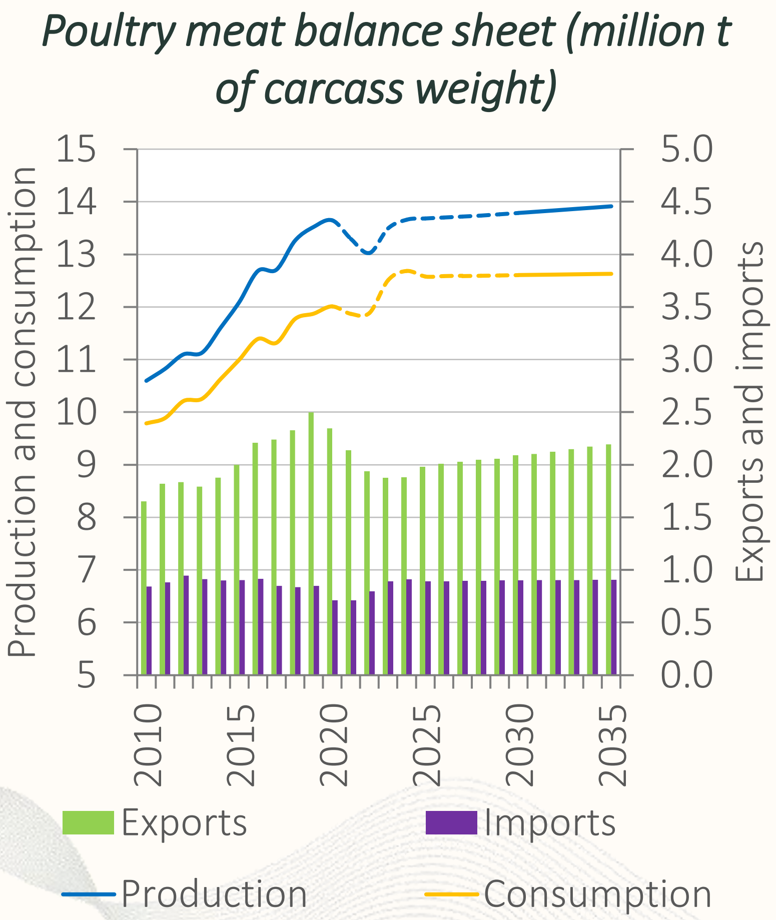
EU dairy exports (million t of milk eq.)

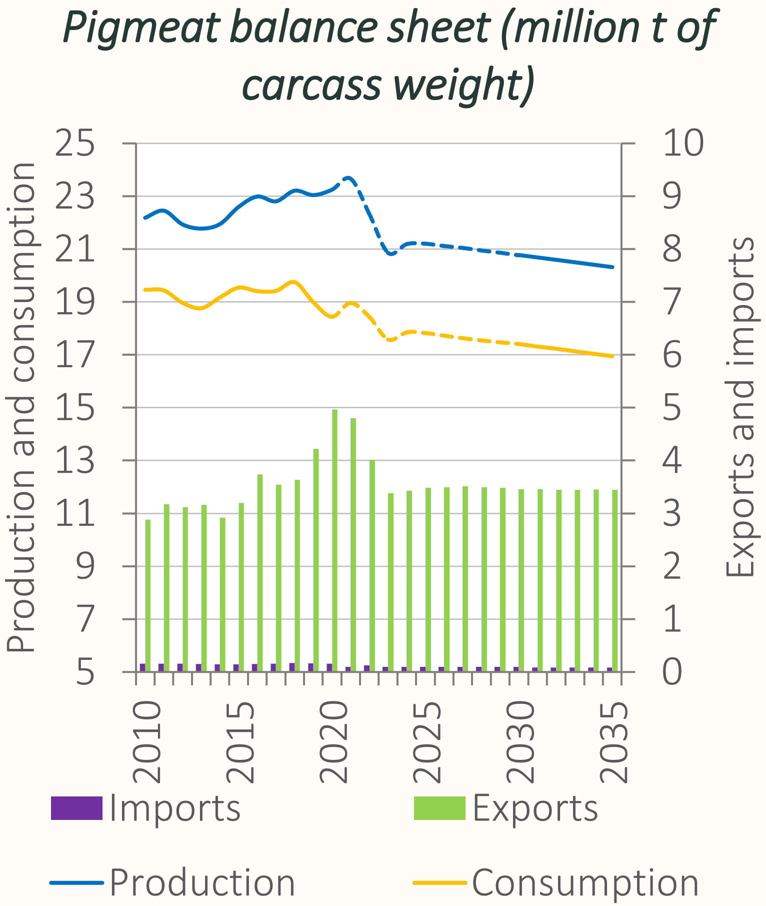


Average annual growth rate of EU milk production

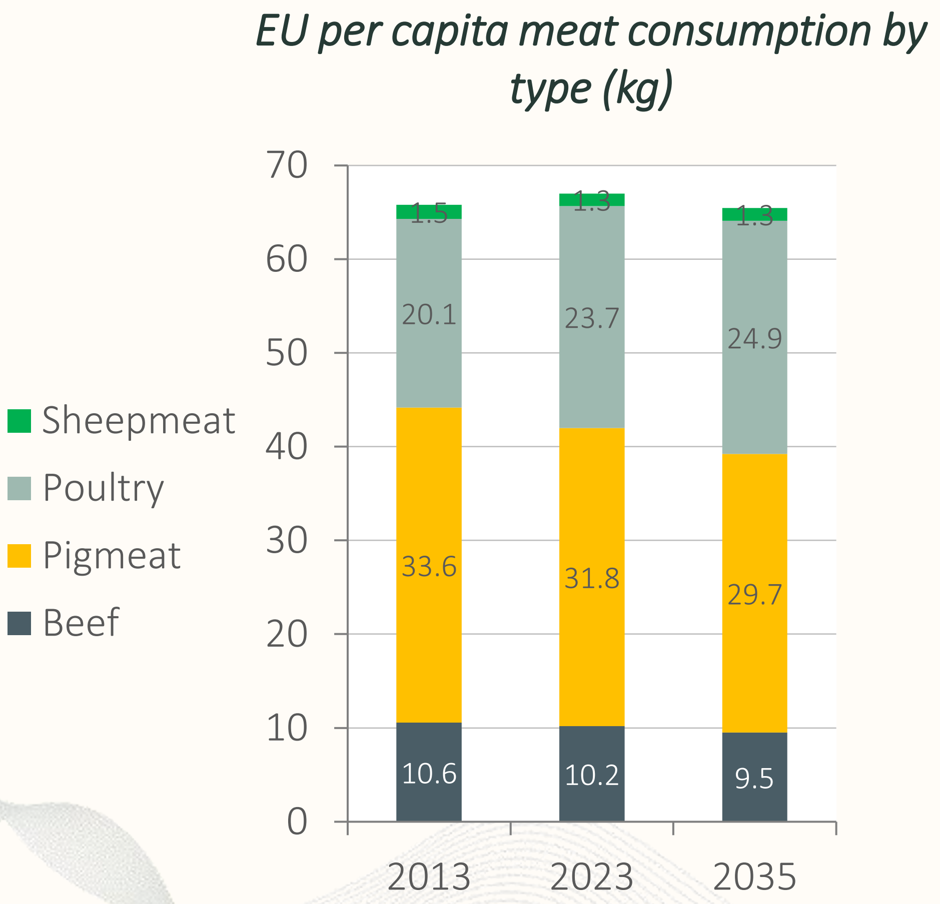


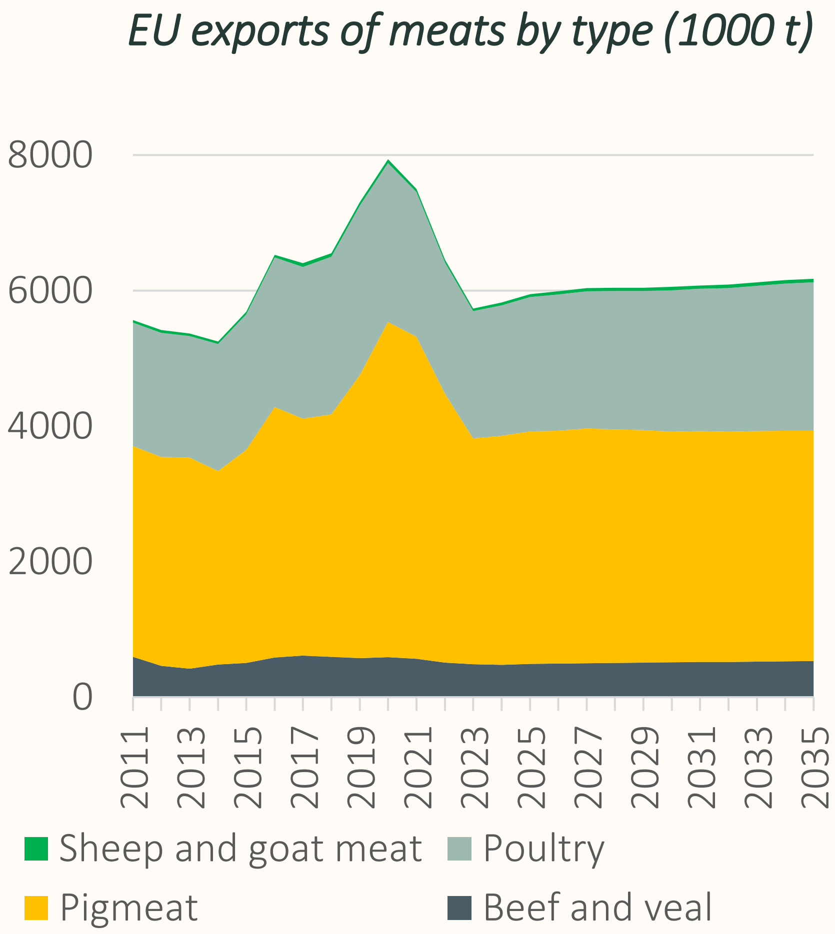
Contrasting developments in poultry and pigmeat





EU meat consumption declines while exports remains more stable

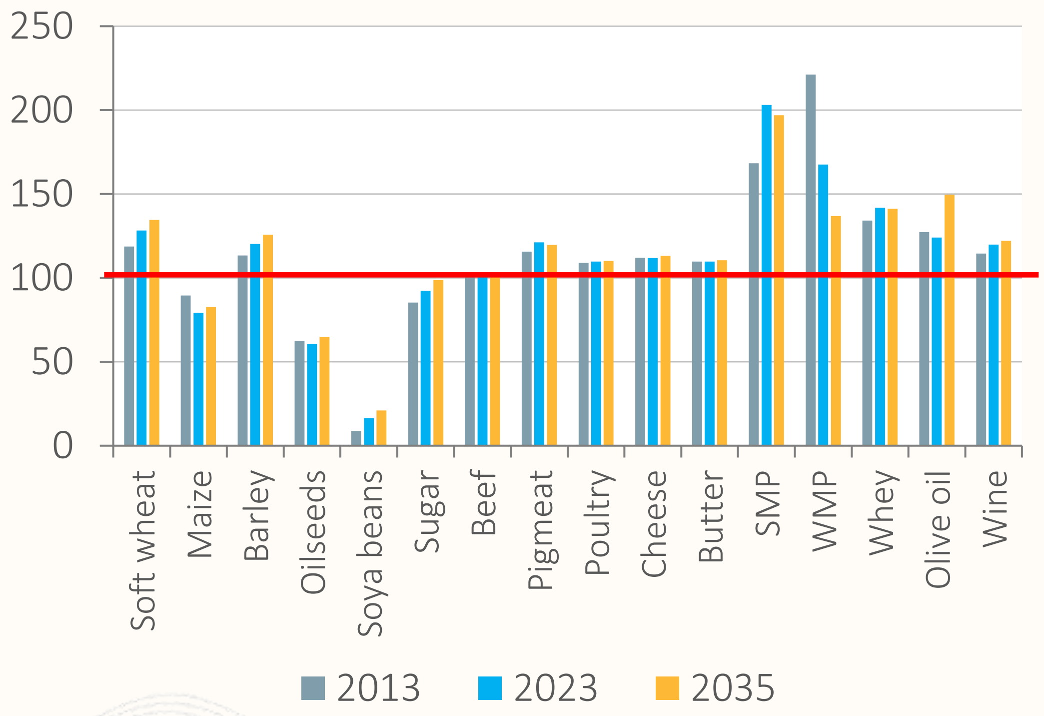




IN A NUTSHELL

EU remains largely self-sufficient

EU self-sufficiency rates in selected commodities



Report and tables: *https://agriculture.ec.europa.eu/data-and-analysis/markets/outlook/medium-term_en*
Sankey diagrams: https://datam.jrc.ec.europa.eu/datam/mashup/AGRI_MTO_FLOWS/index.html

European Commission