



SHORT-TERM OUTLOOK

FOR EU AGRICULTURAL MARKETS
IN 2019 AND 2020










AUTUMN 2019










Edition N°25










Agriculture
and Rural
Development










Market developments in the EU

SPECIALISED CROPS

OLIVE OIL 	2018/2019		2019/2020	
Production	 +3.5%	 -9.2%		
Exports	 +15%	 -6.2%		
Imports	 -25%	 -26%		
Consumption	 -11%	 +11%		

TOMATOES 	2018		2019	
Production	 -7.0%	 +3.9%		
Exports	 +3.9%	 +31%		
Imports	 -2.3%	 +8.4%		
Consumption	 -0.0%	 +1.2%		

APPLES 	2018/2019		2019/2020	
Production	 +38%	 -18%		
Exports	 +106%	 -27%		
Imports	 -30%	 +5.3%		
Consumption	 +15%	 -13%		

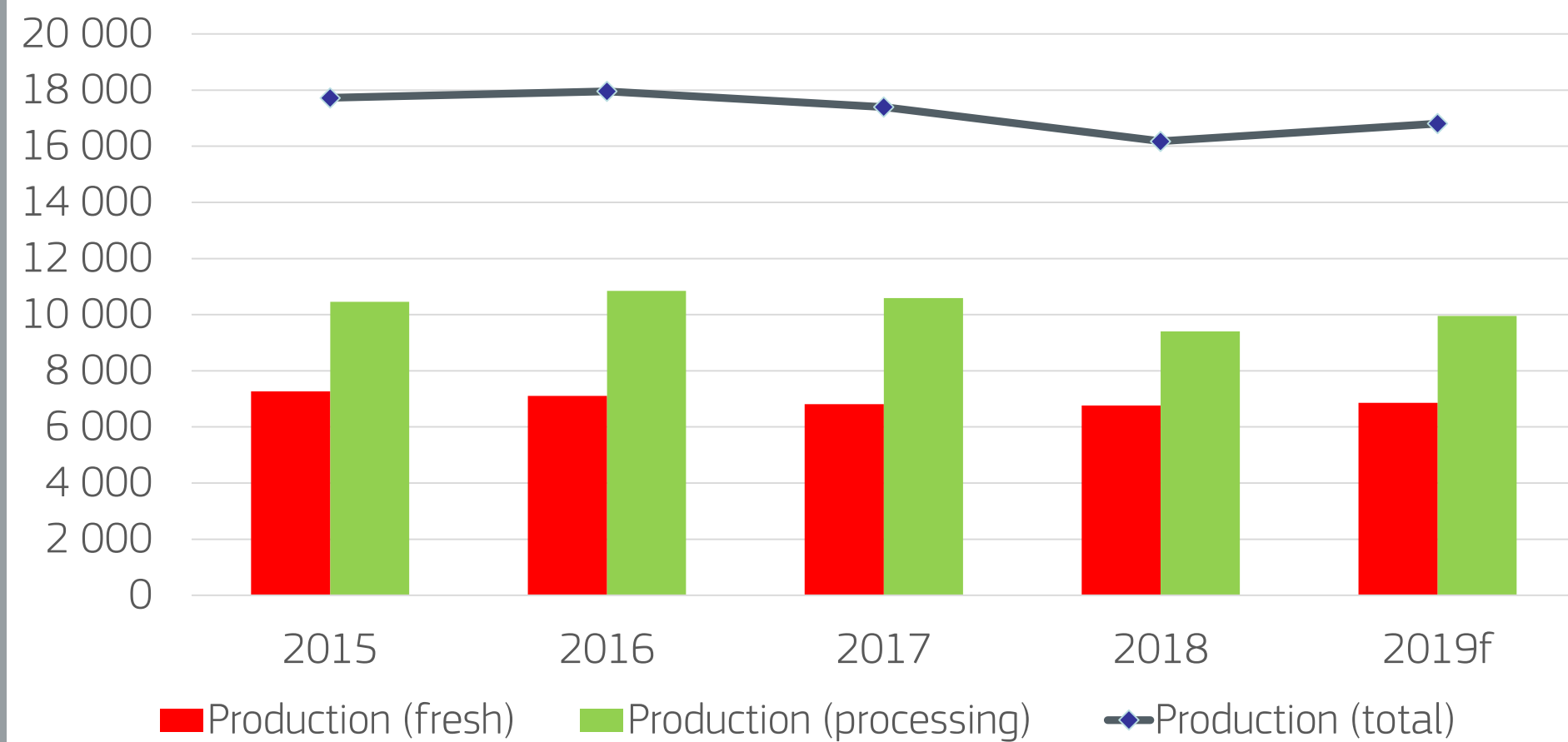
PEACHES NECTARINES 	2018		2019	
Production	 -8.3%	 +3.7%		
Exports	 -27%	 +4.3%		
Imports	 +3.6%	 +8.0%		
Consumption	 -6.4%	 +3.7%		

Note: compared with previous season



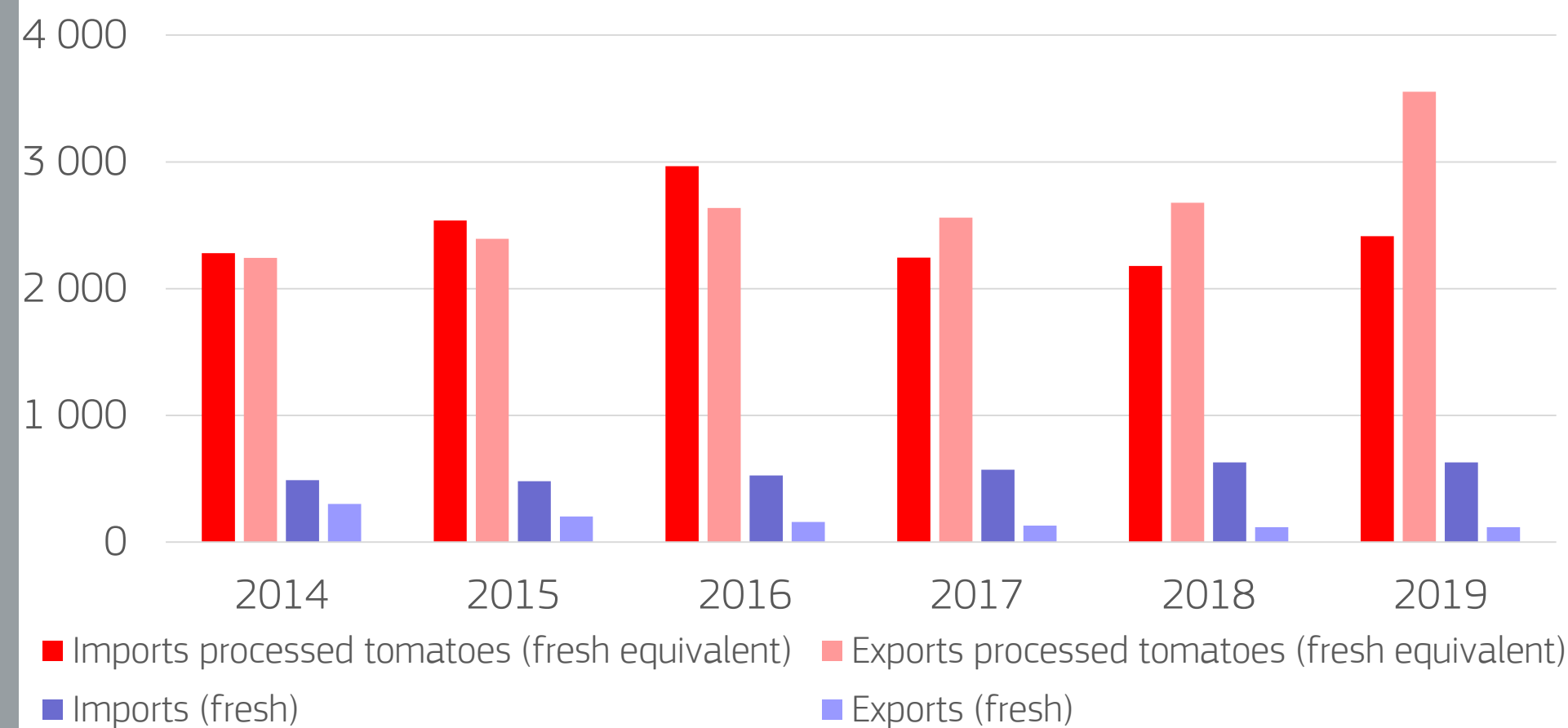
Tomatoes

EU tomato production (1 000 t)



Source: DG Agriculture and Rural Development, based on Eurostat and Tomato Europe

EU tomato trade (1 000 t)



Source: DG Agriculture and Rural Development, based on Eurostat

Increase in EU production of tomatoes mainly for processing

- 🍅 The **total EU production of tomatoes** is estimated to **increase** to around 16.8 million t in 2019 (+4% compared to 2018), driven by a rise in the production of tomatoes **for processing** (+6%). The most significant growth is located in Spain (+14%), thanks to very favourable weather conditions (good ripening, mild temperatures). Nevertheless, the level of total EU tomato production in 2019 lies 2% below the last 5-year average.
- 🍅 The production of **tomatoes for fresh consumption** is expected to only **slightly increase** in 2019 (+1% compared to 2018) resulting from, on the one hand, an increase of production in small producing countries and, on the other hand, a reduction in larger producing countries (damaged greenhouse production in Spain, higher production of smaller tomato varieties leading to lower volumes, replacement of tomatoes by other vegetables in greenhouses).
- 🍅 The per capita consumption of fresh tomatoes is expected to slightly increase in 2019 (+1%) compared to 2018, whereas the (apparent) consumption of processed tomatoes is expected to slightly decrease (-1%).

Strong increase in EU exports of processed tomatoes

- 🍅 After several consecutive years of rising shipments, the **EU imports of fresh tomatoes** are expected to **remain stable** in 2019, compared to 2018.
- 🍅 By contrast, **EU imports of processed tomatoes** (in fresh tomato equivalent) are expected to **increase** by 11% in 2019, in particular imports of prepared and preserved tomatoes from China, but also from Chile and Ukraine.
- 🍅 The low EU market prices of processed tomatoes and the favourable current dollar/euro exchange rate **drive EU exports of processed tomatoes up**, reducing stocks. EU exports, in fresh tomato equivalent, are likely to increase by 33% in 2019 compared to 2018 (+43% compared to average). In particular, exports to Africa (Libya, Sudan, South Africa) are expected to increase.

APPLES

Table 1.15 EU Apple market balance sheets (1000 t)

	EU-28					% variation			
	2015/16	2016/17	2017/18	2018/19e	2019/20f	18/19 vs 17/18	18/19 vs 5-yr.av.*	19/20 vs 18/19	19/20 vs 5-yr.av.*
Area	539	524	522	523	522	0.2	-1.1	-0.2	-0.8
Yield	24	24	19	26	22	37.3	15.8	-17.5	-7.6
Gross production	12 768	12 552	10 041	13 813	11 374	37.6	14.4	-17.7	-8.4
Losses and feed use	823	798	632	860	698	36.1	10.9	-18.8	-11.6
EU usable production	11 945	11 754	9 409	12 953	10 676	37.7	14.7	-17.6	-8.2
EU production for processing	3 601	3 817	3 247	5 345	3 500	64.6	45.5	-34.5	-13.1
Exports (processing)	595	709	503	1 337	950	165.9	98.1	-29.0	10.5
Imports (processing)	982	901	1 561	1 013	1 050	-35.1	-5.9	3.7	-1.4
Consumption (processing)	3 988	4 010	4 305	5 021	3 600	16.6	23.2	-28.3	-15.0
per capita (processed/kg)	8	8	8	10	7	16.3	22.1	-28.5	-15.7
EU production for fresh consumption	8 344	7 937	6 162	7 608	7 176	23.5	-0.2	-5.7	-5.5
Exports (fresh)	1 586	1 475	737	1 213	900	64.7	-15.5	-25.8	-33.7
Imports (fresh)	451	432	556	459	500	-17.5	-5.1	9.0	8.8
Consumption (fresh)	7 209	6 895	5 982	6 853	6 776	14.6	2.8	-1.1	1.2
per capita (fresh/kg)	14	14	12	13	13	14.2	1.8	-1.4	0.3
Self-sufficiency rate %	114	115	98	116	110				

Source: DG Agriculture and Rural Development, based on Eurostat

TOMATOES

Table 1.16 EU tomato market balance sheets (1000 t)

	EU-28					% variation			
	2015	2016	2017	2018	2019f	2018 vs 2017	2018 vs 5-yr.av.*	2019 vs 2018	2019 vs 5-yr.av.*
Production (total)	17 725	17 959	17 399	16 176	16 807	-7.0	-4.4	3.9	-1.8
Production (processing)	10 454	10 851	10 592	9 408	9 953	-11.2	-5.9	5.8	-2.1
of which ES, IT, PT	9 452	9 898	9 727	8 585	9 063	-11.7	-5.5	5.6	-2.0
other EU countries	1 002	953	865	823	890	-4.8	-9.8	8.1	-2.6
Imports (fresh equivalent)	2 537	2 966	2 245	2 178	2 413	-3.0	-10.7	10.8	-1.2
Exports (fresh equivalent)	2 393	2 636	2 559	2 678	3 553	4.6	8.8	32.7	42.0
Consumption (Processing)	10 598	11 182	10 278	8 909	8 813	-13.3	-10.7	-1.1	-12.8
per capita processing EU-28	21	22	20	17	17	-13.5	-11.2	-1.2	-13.3
Production (fresh)	7 271	7 108	6 807	6 768	6 855	-0.6	-2.4	1.3	-1.5
of which ES, IT, NL, FR, EL, RO	5 656	5 459	5 139	5 115	5 105	-0.5	-4.0	-0.2	-4.2
other EU countries	1 615	1 649	1 667	1 653	1 750	-0.8	3.1	5.9	7.5
Imports	481	525	570	628	629	10.1	25.4	0.1	16.8
Exports	202	159	131	117	118	-10.2	-49.3	0.6	-35.1
Consumption (Fresh)	7 550	7 474	7 246	7 279	7 365	0.4	1.1	1.2	0.7
per capita (fresh) EU (kg)	15	15	14	14	14	0.2	0.4	1.0	0.1
Self-sufficiency rate %	98	96	99	100	104				

* consumption also includes stock variation