SHORT-TERM OUTLOOK

for EU agricultural markets in 2021





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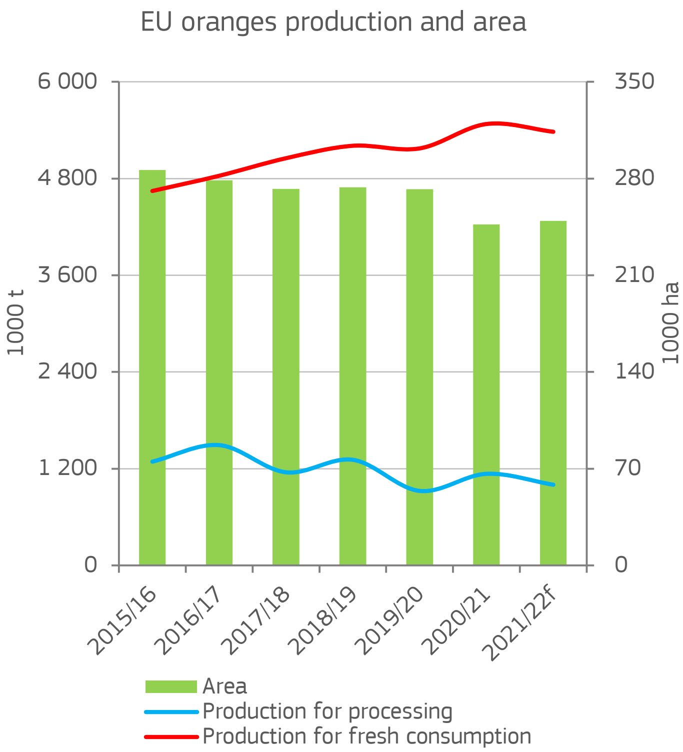
ORANGES

SLIGHT DECLINE IN EU ORANGE PRODUCTION IN 2021/22



Source: DG Agriculture and Rural Development, based on Eurostat.

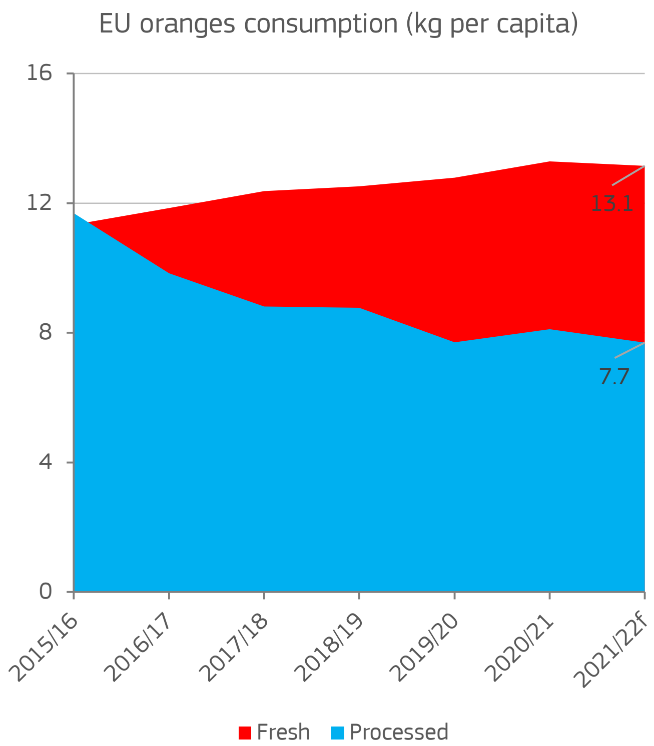
In 2021/22 EU orange production is expected to decline by 3% to 6.4 million t (stable compared to 5-year average) driven by a 4% drop in IT (29% of the EU production) notably due to adverse weather conditions. Production in ES, the main producer of oranges in the EU with 52% of the EU total production, should remain stable.

Almost 85% of the total production (5.4 million t) is expected to be sold fresh (-2% year-on-year and 5% above 5-year average) with the remaining 1 million t going into processing.

EU orange area is forecast to increase by 1% to 250 000 ha compared to 2020/21 (still 9% below 5-year average).

The bad weather conditions in IT should push overall yields down to 25 t/ha a 5% decrease year-on-year (but 10% above 5-year average).

CONSUMPTION OF FRESH ORANGES IN SLIGHT DECLINE BUT REMAINS HIGH



Source: DG Agriculture and Rural Development, based on Eurostat.

The EU per capita consumption of fresh oranges significantly increased since the COVID-19 pandemic, due to the associated positive health benefits. It is forecast to remain high at 13.1 kg in 2021/22 (5% above 5-year average) despite a slight decline this marketing year (-1% year-on-year).

The decline in the EU production together with a high per capita consumption should lead to an increase in EU imports of fresh oranges (+3% year-on-year) , while EU exports could decline (-4% year-on year).

The apparent per capita consumption of processed oranges is expected to follow the long-term trend and decline to 7.7 kg (-5% year-on-year, 10% below 5-year average). This is explained by the substitution of the consumption of processed orange juice by fresh oranges. This substitution also drives the continuing decline of EU imports of processed oranges forecast at 3.5 million t in 2021/22 (-3% year-on-year, 16% below 5-year average). EU export of processed oranges are also expected to decline (-5% year-on-year).

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