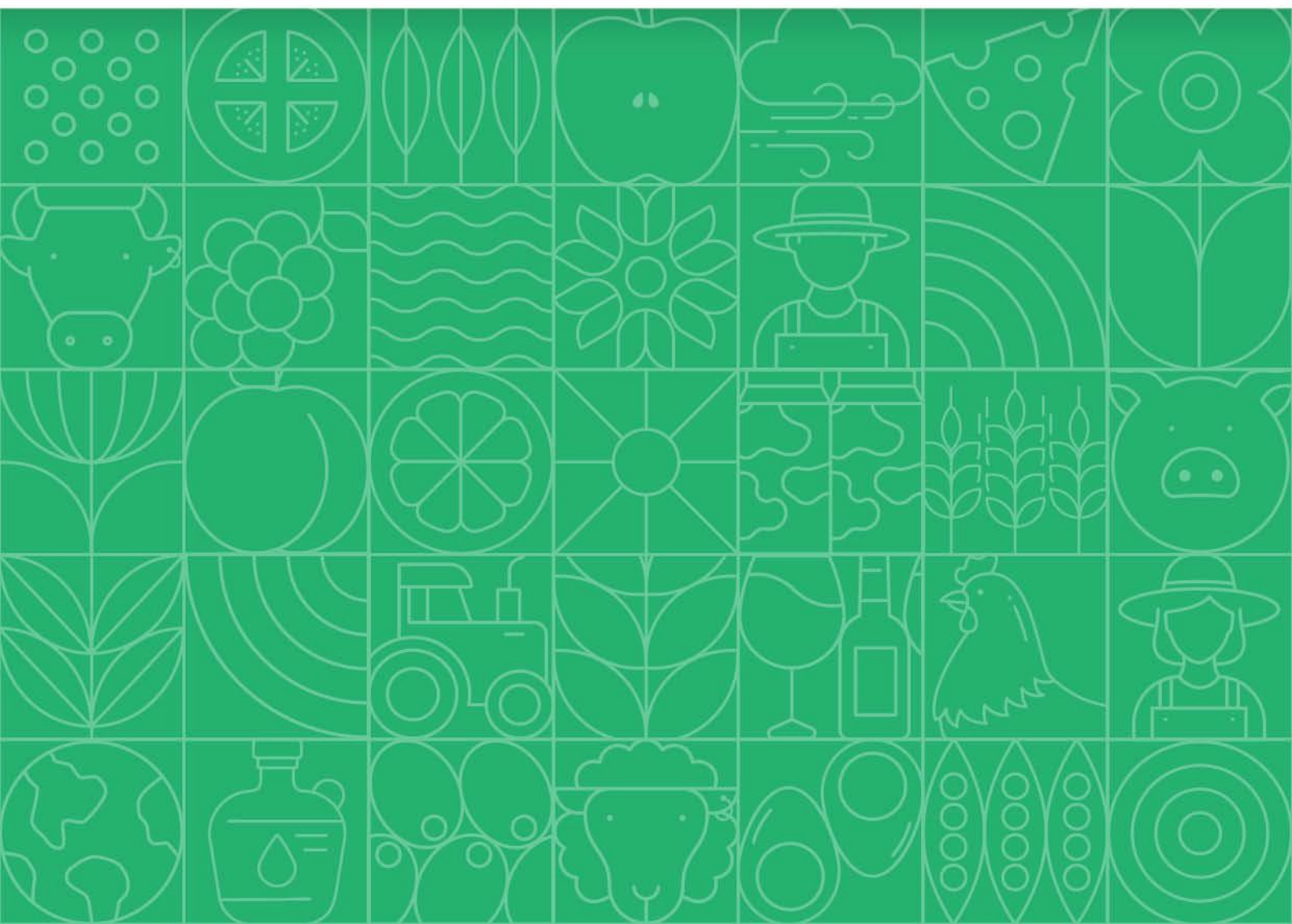


EU AGRICULTURAL **OUTLOOK** 2025-2035



SPOTLIGHT ON APPLES

DESPITE A DECLINING GROWING AREA, APPLE PRODUCTION SHOULD STABILISE

The total production of apples for fresh consumption in the six main EU apple-producing countries is expected to increase by about 1.6% from 2025 to 2035. At the same time, the total growing area could decrease by about 4.6%. In particular, Poland is expected to see a decline in growing area due to small farms going out of business, but this could be offset by an average growth in yields of about 6.5% over the next decade, linked to a shift towards more intensive, industrial-scale orchards delivering exclusively to the processing industry. Yields are expected to increase in Hungary between now and 2035 but to slightly decline in all other key EU apple-producing countries. Key challenges faced by EU apple growers include climate change, a shortage of plant protection products and rising labour costs.

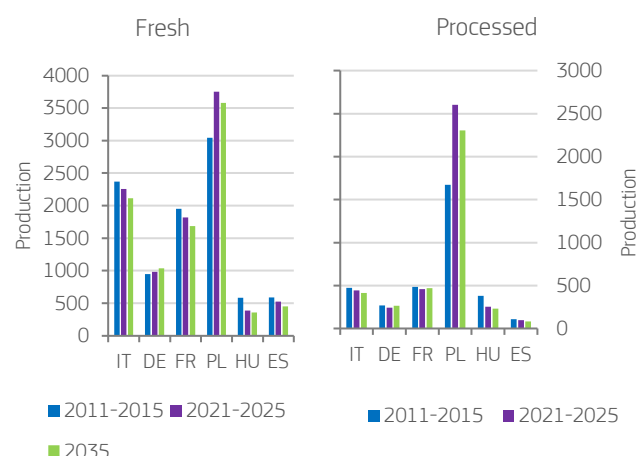
FRESH APPLE CONSUMPTION IS LIKELY TO FALL

Per capita consumption of fresh apples is expected to decline in most of the EU's main apple-producing countries except Poland, where it is projected to remain stable. This declining trend reflects changes in consumer preferences, especially among the younger generations. Although apples are generally more affordable than other fruits, consumers increasingly prefer to buy fruits such as avocados or berries. In some countries, the apple sector is trying to win over young people for example by depicting cartoon characters on the packaging. In contrast, the EU Agricultural Outlook is more positive for processed apples. Per capita consumption could increase in four out of seven selected EU countries. In France, the consumption of processed apples has increased considerably, offsetting the decline in the consumption of fresh apples.

LARGER VOLUMES OF FRESH APPLES COULD BE SUPPLIED

The EU exports almost half of its total production. This share is expected to increase further to 55% between now and 2035, with Poland and Italy remaining the EU's main exporters of both fresh apples and processed products. However, both countries could see declining net export growth for fresh apples. Overall, the EU is projected to remain a net exporter of fresh apples, with a 4.9% increase in export volumes over the coming decade (compared to 2021-2025). Focusing on organic or 'club' varieties could help strengthen the EU's position globally. Looking at trade in processed products, the EU is likely to become structurally reliant on imports, but trade volumes could remain small over the next decade. The projected increase in EU net imports of processed products is linked to rising imports in countries such as Germany and France that have traditionally been net importers.

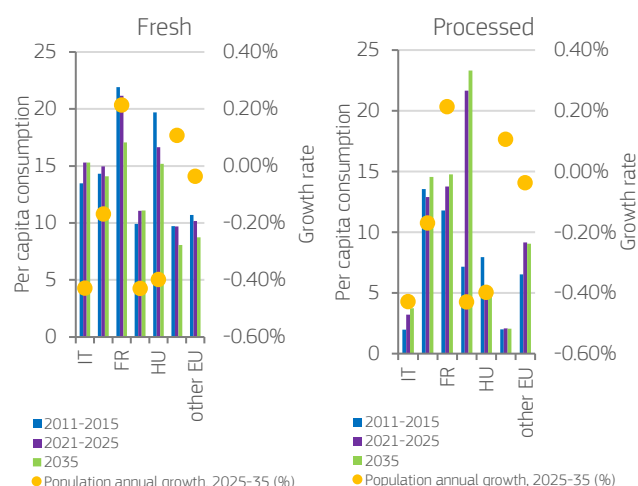
GRAPH 6.10 Production of apples (1000 t)



Source: AGMEMOD simulation.

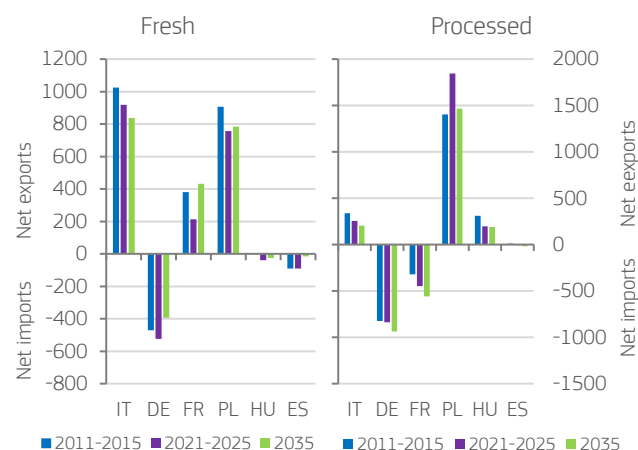
Note: 2011-2015 and 2021-2025 represent Olympic averages (in all graphs).

GRAPH 6.11 Per capita consumption of apples (kg) and population growth (%)



Source: AGMEMOD simulation.

GRAPH 6.12 Net trade developments of apples (1000 t)



Source: AGMEMOD simulation.