



**asemesa**  
Asociación Española de Exportadores  
e Industriales de Aceitunas de Mesa

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# **MARKET SITUATION IN THE SPANISH TABLE OLIVES SECTOR**

**CDG ON AGRICULTURAL MARKETS – OLIVES**  
**27/10/2023**

## 1. Recent evolution of table olive production in Spain.

### PRODUCTION BY VARIETY AVERAGE 2013/2022

(THOUSANDS OF TONS INCLUDING IMPORTS)

FINAL PRODUCTION											AVERAGE
VARIETIES	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2013/2022
MANZANILLA	147,79	186,28	137,29	215,53	155,55	209,29	114,88	180,35	189,41	117,00	165,34
GORDAL	11,02	26,19	41,25	47,40	47,27	42,73	20,50	34,72	40,73	19,21	33,10
HOJIBLANCA	288,55	264,80	291,22	261,77	281,14	273,15	230,57	284,98	310,21	239,45	272,58
CACEREÑA	39,82	35,16	45,40	30,18	28,83	21,29	48,32	17,41	67,59	18,10	35,21
CARRASQUEÑA	64,15	22,11	57,34	16,69	23,76	16,51	19,43	6,80	24,62	3,65	25,51
OTHERS	21,32	18,69	28,97	24,78	26,26	24,83	24,33	22,29	26,78	18,18	23,64
<b>TOTAL SPAIN</b>	<b>572,65</b>	<b>553,23</b>	<b>601,47</b>	<b>596,35</b>	<b>562,81</b>	<b>587,80</b>	<b>458,03</b>	<b>546,55</b>	<b>659,33</b>	<b>415,59</b>	<b>555,38</b>

Source: Agencia de Información y Control Alimentario (AICA).

## 1. Recent evolution of table olive production in Spain.

### PRODUCTION BY VARIETY AVERAGE 2019/2022 (THOUSANDS OF TONS INCLUDING IMPORTS)

FINAL PRODUCTION					AVERAGE
VARIETIES	2019	2020	2021	2022	2019/2022
MANZANILLA	114,88	180,35	189,41	117,00	150,41
GORDAL	20,50	34,72	40,73	19,21	28,79
HOJIBLANCA	230,57	284,98	310,21	239,45	266,30
CACEREÑA	48,32	17,41	67,59	18,10	37,86
CARRASQUEÑA	19,43	6,80	24,62	3,65	13,63
OTHERS	24,33	22,29	26,78	18,18	22,90
<b>TOTAL SPAIN</b>	<b>458,03</b>	<b>546,55</b>	<b>659,33</b>	<b>415,59</b>	<b>519,88</b>

Source: Agencia de Información y Control Alimentario (AICA).

## 2. Expected production for the 2023/24 campaign.

### COMPARATIVE 1º, 2º, 3º, 4º ADVANCE 2023 VERSUS AVERAGE 2019/2022 CAMPAIGNS

(THOUSANDS OF TONS)

VARIETIES	AVERAGE PRODUCTION 2019-2022	FORECAST 2023 1º ADVANCE	FORECAST 2023 2º ADVANCE	FORECAST 2023 3º ADVANCE	FORECAST 2023 4º ADVANCE
MANZANILLA	150,41	SAME TO AVERAGE	136,04	145,02	124,63
GORDAL	28,79	SAME TO AVERAGE	26,33	26,80	25,34
HOJIBLANCA	266,3	MUCH LOWER AVERAGE	168,89	195,67	187,23
CACEREÑA	37,86	MUCH HIGHER AVERAGE	44,89	45,60	42,68
CARRASQUEÑA	13,63	MUCH HIGHER AVERAGE	44,53	45,77	30,03
OTHERS	22,9	SAME TO AVERAGE	19,18	19,89	19,18
<b>TOTAL</b>	<b>519,88</b>	<b>SAME TO AVERAGE</b>	<b>439,86</b>	<b>478,75</b>	<b>429,09</b>

Source: Organización Interprofesional de la Aceituna de Mesa (Interaceituna).

## 2. Expected production for the 2023/24 campaign.

### COMPARATIVE 4º ADVANCE VERSUS LAST CAMPAIGN 2022 AND AVERAGE 2019/2022 (THOUSANDS OF TONS)

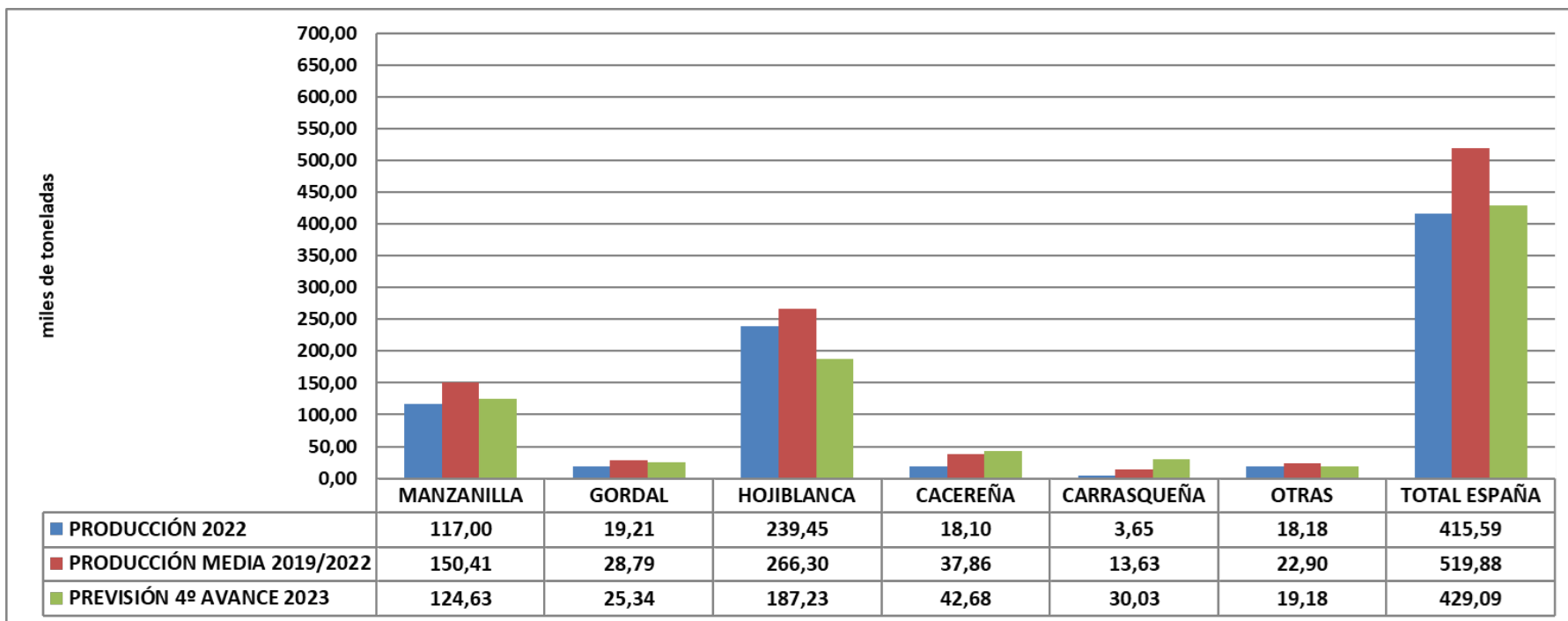
VARIETIES	FORECAST 4º ADVANCE 2023	LAST CAMPAIGN			AVERAGE 4 LAST CAMPAIGNS		
		PRODUCTION 2022	DIFFERENCE		AVERAGE 2019/2022	DIFFERENCE	
			KG.	%		KG.	%
MANZANILLA	124,63	117,00	7,63	6,52	150,41	-25,78	-17,14
GORDAL	25,34	19,21	6,13	31,91	28,79	-3,45	-11,98
HOJIBLANCA	187,23	239,45	-52,22	-21,81	266,30	-79,07	-29,69
CACEREÑA	42,68	18,10	24,58	135,80	37,86	4,83	12,75
CARRASQUEÑA	30,03	3,65	26,38	722,74	13,63	16,41	120,40
OTHERS	19,18	18,18	1,00	5,50	22,90	-3,72	-16,23
<b>TOTAL SPAIN</b>	<b>429,09</b>	<b>415,59</b>	<b>13,50</b>	<b>3,25</b>	<b>519,88</b>	<b>-90,79</b>	<b>-17,46</b>

Source: Organización Interprofesional de la Aceituna de Mesa (Interaceituna).

## 2. Expected production for the 2023/24 campaign.

COMPARATIVE 4º ADVANCE VERSUS LAST CAMPAIGN 2022 AND AVERAGE 2019/2022

(THOUSANDS OF TONS)



## 3. Recent evolution of Spanish table olive exports.

### SPANISH TABLE OLIVE EXPORTS BY GEOGRAPHICAL AREA

(Net Drained Weight)

	2018	2019		2020		2021		2022	
	TM	TM	% 19/18	TM	%20/19	TM	% 21/20	TM	% 22/21
<b>EU</b>	118.534	132.794	12,03	122.931	-7,43	133.541	8,63	139.789	4,68
<b>NORTH AMERICA</b>	76.647	95.543	24,65	76.767	-19,65	69.801	-9,07	79.740	14,24
<b>ARAB COUNTRIES</b>	29.675	32.197	8,50	30.997	-3,73	28.819	-7,03	31.461	9,17
<b>EASTERN AND BALKAN COUNTRIES</b>	25.043	31.349	25,18	25.402	-18,97	28.759	13,22	26.070	-9,35
<b>CENTRAL AND SOUTH AMERICA</b>	11.463	16.937	47,76	12.116	-28,47	15.001	23,81	16.084	7,22
<b>OTHERS</b>	31.382	36.377	15,92	35.367	-2,78	38.009	7,47	38.712	1,85
<b>TOTAL</b>	<b>292.744</b>	<b>345.197</b>	<b>17,92</b>	<b>303.579</b>	<b>-12,06</b>	<b>313.930</b>	<b>3,41</b>	<b>331.856</b>	<b>5,71</b>

Source: Aduanas de España

## 3. Recent evolution of Spanish table olive exports.

### SPANISH TABLE OLIVE EXPORTS BY GEOGRAPHICAL AREA

JANUARY/JULY - (Net Drained Weight)

	2022	2023	
	TM	TM	% 22/23
<b>EU</b>	78.674	81.754	3,91
<b>NORTH AMERICA</b>	43.155	38.497	-10,79
<b>ARAB COUNTRIES</b>	19.530	14.896	-23,73
<b>EASTERN AND BALKAN COUNTRIES</b>	10.513	11.067	5,27
<b>CENTRAL AND SOUTH AMERICA</b>	9.712	4.658	-52,04
<b>OTHERS</b>	23.120	18.777	-18,78
<b>TOTAL</b>	<b>184.704</b>	<b>169.649</b>	<b>-8,15</b>

Source: Aduanas de España.



## 3. Recent evolution of Spanish table olive exports.

### RANKING OF TABLE OLIVE IMPORTING COUNTRIES FROM SPAIN

(Net Drained Weight)

COUNTRY	2018 KILOS	2019 KILOS	%	2020 KILOS	%	2021 KILOS	%	2022 KILOS	%
USA	61.475.552	77.991.194	26,9	60.717.052	-22,1	54.486.889	-10,3	62.297.066	14,3
ITALY	33.530.786	38.840.349	15,8	31.580.911	-18,7	31.592.700	0,0	32.911.206	4,2
PORTUGAL	12.821.785	16.696.804	30,2	13.921.354	-16,6	22.089.684	58,7	25.376.605	14,9
FRANCE	21.656.362	23.075.436	6,6	24.103.402	4,5	23.874.140	-1,0	24.641.666	3,2
GERMANY	20.243.313	21.615.316	6,8	21.389.335	-1,0	20.778.221	-2,9	20.218.975	-2,7
SAUDI ARABIA	18.626.357	18.598.445	-0,1	18.440.208	-0,9	16.398.295	-11,1	18.671.802	13,9
UK	13.300.326	14.495.602	9,0	15.844.842	9,3	16.709.619	5,5	16.830.740	0,7
RUSSIA	16.366.227	20.795.096	27,1	16.478.791	-20,8	18.056.395	9,6	16.190.769	-10,3
CANADA	9.369.147	11.360.225	21,3	10.350.957	-8,9	9.829.893	-5,0	10.520.265	7,0
POLAND	6.285.581	8.445.880	34,4	8.735.274	3,4	10.944.756	25,3	8.338.962	-23,8
BRAZIL	5.214.115	9.430.556	80,9	5.893.874	-37,5	6.321.078	7,2	8.069.313	27,7
MEXICO	5.802.518	6.191.204	6,7	5.698.692	-8,0	5.484.213	-3,8	6.922.499	26,2
NETHERLANDS	4.267.506	4.030.944	-5,5	3.923.497	-2,7	4.194.030	6,9	5.509.509	31,4
SOUTH KOREA	2.278.823	2.511.023	10,2	3.071.014	22,3	4.326.979	40,9	4.167.768	-3,7
AUSTRALIA	3.165.475	4.958.831	56,7	4.688.277	-5,5	4.158.520	-11,3	4.085.189	-1,8
OTHERS	58.339.686	66.160.150	13,4	58.741.271	-11,2	64.684.628	10,1	67.104.110	3,7
<b>WORLD TOTAL</b>	<b>292.743.559</b>	<b>345.197.055</b>	<b>17,9</b>	<b>303.578.751</b>	<b>-12,1</b>	<b>313.930.040</b>	<b>3,4</b>	<b>331.856.444</b>	<b>5,7</b>

Source: Aduanas de España

## 3. Recent evolution of Spanish table olive exports.

### RANKING OF TABLE OLIVE IMPORTING COUNTRIES FROM SPAIN

JANURY/JULY - (Net Drained Weight)

COUNTRY	2022 KILOS	2023 KILOS	% 23/22
USA	32.668.582	31.361.637	-4,0
PORTUGAL	10.492.420	18.616.614	77,4
ITALY	20.216.947	18.148.414	-10,2
FRANCE	15.502.450	15.786.181	1,8
GERMANY	11.753.729	10.900.487	-7,3
SAUDI ARABIA	11.970.159	9.557.126	-20,2
UK	10.308.781	8.747.430	-15,1
RUSSIA	6.401.507	6.953.249	8,6
CANADA	6.267.918	4.892.941	-21,9
POLAND	4.384.257	4.476.720	2,1
NETHERLANDS	3.097.073	2.464.841	-20,4
SWEDEN	2.244.699	2.181.665	-2,8
MEXICO	4.218.757	2.242.638	-46,8
SOUTH KOREA	2.473.823	1.949.590	-21,2
AUSTRALIA	2.438.416	1.964.880	-19,4
OTHERS	40.379.448	29.515.965	-26,9
<b>WORLD TOTAL</b>	<b>184.818.966</b>	<b>169.760.378</b>	<b>-8,1</b>

Source: Aduanas de España

## 4. New export opportunities in international markets.

### TABLE OLIVE CONSUMPTION BY COUNTRY

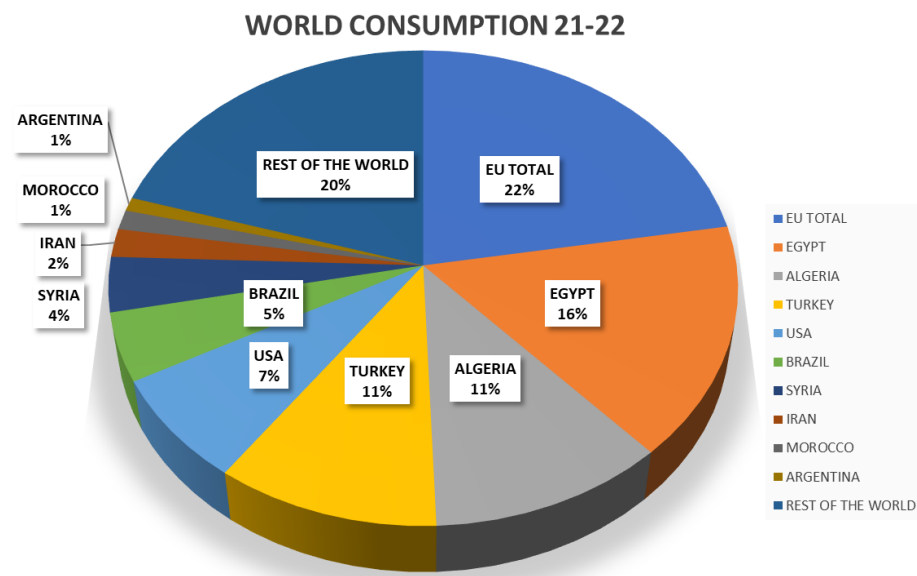
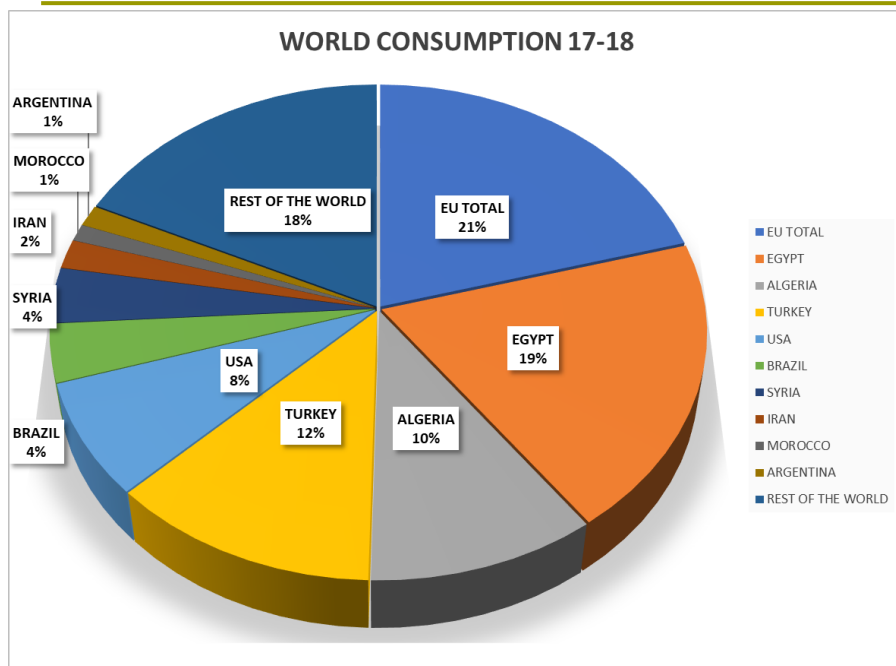
(Net Drained Weight Thousands of Tons)

	2017-18	2018-19		2019-20		2020-21		2021-22		
	TM	TM	% 18/17	TM	% 19/18	TM	%20/19	TM	% 21/20	% 22/17
EU TOTAL	595	593	-0,34	596	0,51	581	-2,52	604	3,96	1,51
Spain	192	191	-0,52	177	-7,33	168	-5,08	199	18,45	3,65
France	65	70	7,69	86	22,86	88	2,33	89	1,14	36,92
Italy	107	92	-14,02	107	16,30	123	14,95	117	-4,88	9,35
Germany	46	49	6,52	47	-4,08	47	0,00	41	-12,77	-10,87
Romania	30	27	-10,00	27	0,00	30	11,11	28	-6,67	-6,67
EGYPT	555	600	8,11	600	0,00	569	-5,17	430	-24,43	-22,52
ALGERIA	300	305	1,67	329	7,87	275	-16,41	303	10,18	1,00
TURKEY	355	349	-1,69	340	-2,58	330	-2,94	285	-13,64	-19,72
USA	216	182	-15,74	222	21,70	176	-20,54	197	11,93	-8,80
BRAZIL	110	118	7,27	125	5,93	130	4,00	126	-3,08	14,55
SYRIA	105	157	49,52	100	-36,31	103	3,00	101	-1,94	-3,81
IRAN	55	75	36,36	61	-18,67	60	-1,64	52	-13,33	-5,45
MOROCCO	32	32	0,00	35	9,38	36	2,86	36	0,00	12,50
ARGENTINA	40	35	-12,50	25	-28,57	25	0,00	25	0,00	-37,50
REST OF THE WORLD	515	526	2,14	541	2,76	565	4,53	548	-3,01	6,41
WORLD TOTAL	2.878	2.972	3,27	2.973	0,03	2.850	-4,14	2.707	-5,02	-5,94

(Source: COI)

Data November 2022

## 4. New export opportunities in international markets.



## MARKET SITUATION IN THE SPANISH TABLE OLIVES SECTOR

### 4. New export opportunities in international markets

TABLE OLIVE IMPORTS BY COUNTRY

(Net Drained Weight Thousands of Tons)

	2017-18		2018-19		2019-20		2020-21		2021-22	
	TM		TM	% 18/17	TM	% 19/18	TM	%20/19	TM	% 21/20
<b>USA</b>	141		172	21,99	147	-14,53	159	8,16	158	-0,63
<b>BRAZIL</b>	110		118	7,27	125	5,93	130	4,00	126	-3,08
<b>EU</b>	114		114	0,00	114	0,00	116	1,75	112	-3,45
France	32		31	-3,13	30	-3,23	31	3,33	31	0,00
Romania	12		14	16,67	13	-7,14	13	0,00	16	23,08
Greece	9		11	22,22	9	-18,18	11	22,22	13	18,18
Belgium	13		13	0,00	15	15,38	14	-6,67	12	-14,29
Germany	10		10	0,00	9	-10,00	10	11,11	8	-20,00
Spain	16		10	-37,50	18	80,00	16	-11,11	8	-50,00
<b>CANADA</b>	32		33	3,13	32	-3,03	40	25,00	36	-10,00
<b>SAUDI ARABIA</b>	28		27	-3,57	28	3,70	28	0,00	29	3,57
<b>CHILE</b>	19		20	5,26	19	-5,00	28	47,37	25	-10,71
<b>RUSSIA</b>	25		28	12,00	29	3,57	25	-13,79	22	-12,00
<b>AUTRALIA</b>	18		19	5,56	17	-10,53	20	17,65	19	-5,00
<b>SWITZERLAND</b>	7		8	14,29	6	-25,00	15	150,00	14	-6,67
<b>IRAQ</b>	16		13	-18,75	11	-15,38	15	36,36	13	-13,33
<b>REST OF THE WORLD</b>	132		124	-6,06	123	-0,81	135	9,76	137	1,48
<b>WORLD TOTAL</b>	<b>642</b>		<b>676</b>	<b>5,30</b>	<b>651</b>	<b>-3,70</b>	<b>711</b>	<b>9,22</b>	<b>691</b>	<b>-2,81</b>

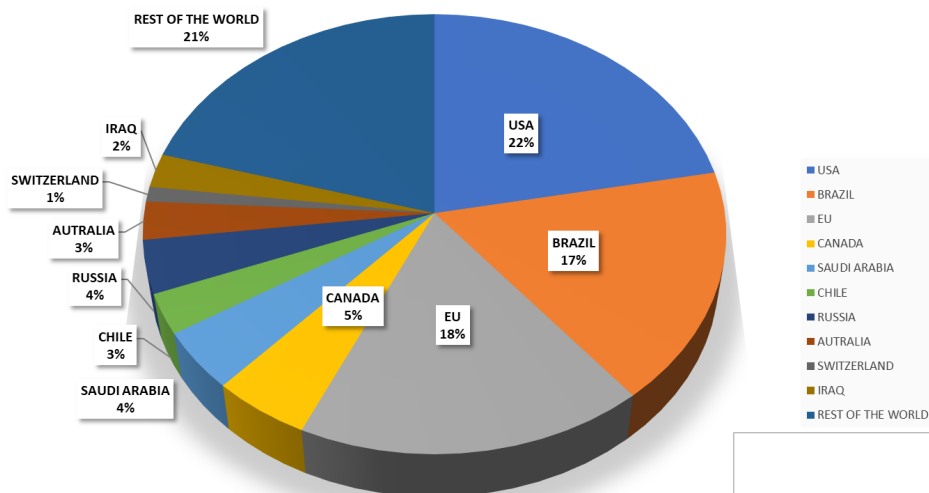
(Source: COI)

Data November 2022

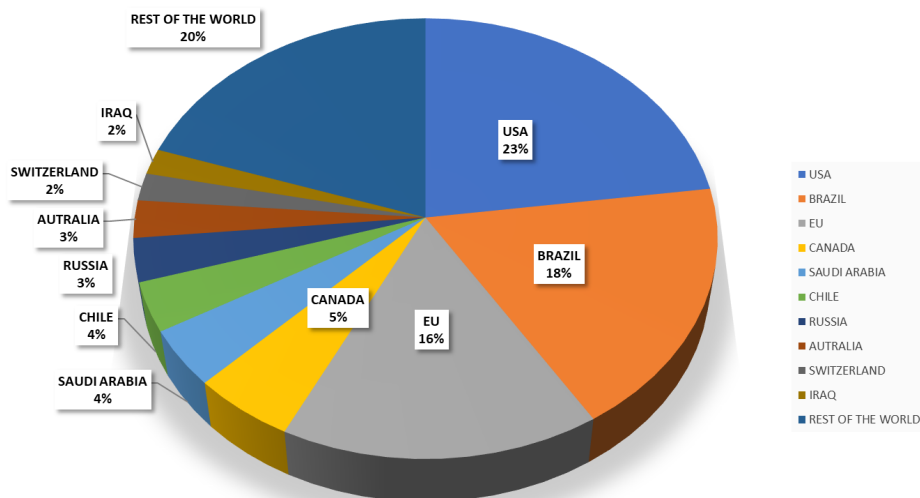
## MARKET SITUATION IN THE SPANISH TABLE OLIVES SECTOR

### 4. New export opportunities in international markets

WORLD IMPORTS 17-18



WORLD IMPORTS 21-22





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## MARKET SITUATION IN THE SPANISH TABLE OLIVES SECTOR

CDG ON AGRICULTURAL MARKETS – OLIVES - 27/10/2023

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THANK YOU

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