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Asociación Española de Exportadores
e Industriales de Aceitunas de Mesa

WG Olives Market Situation and Technical Issues

Adjunto al Secretario General. ASEMESA.

4th June 2021



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WG OLIVES MARKET SITUATION AND TECHNICAL ISSUES

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- **Spanish and World Exports of Table Olives to US**
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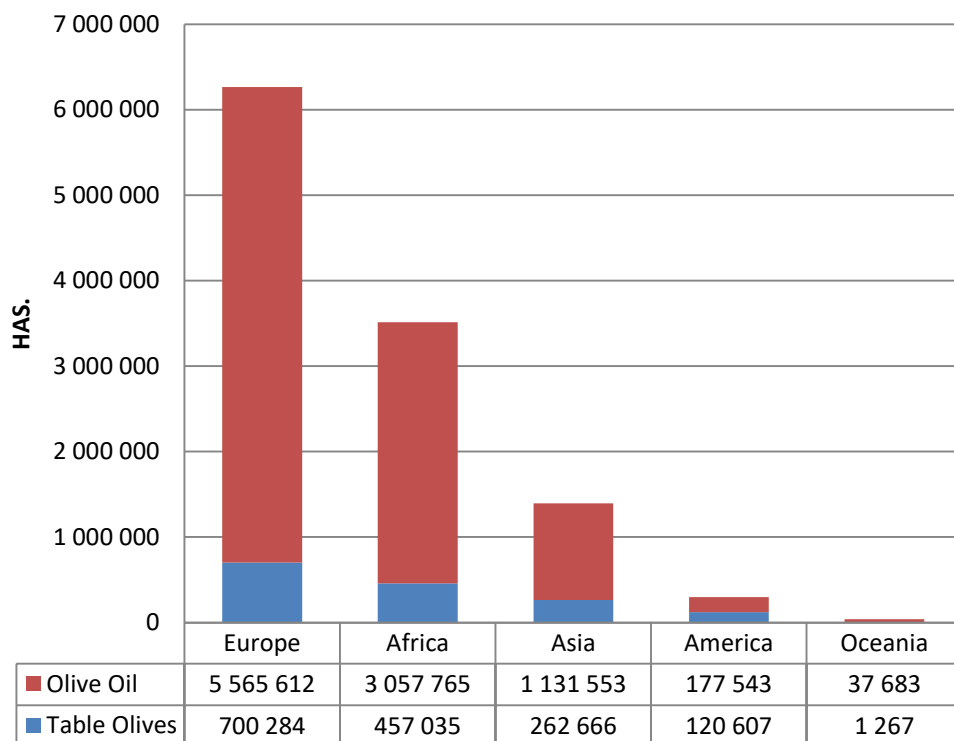
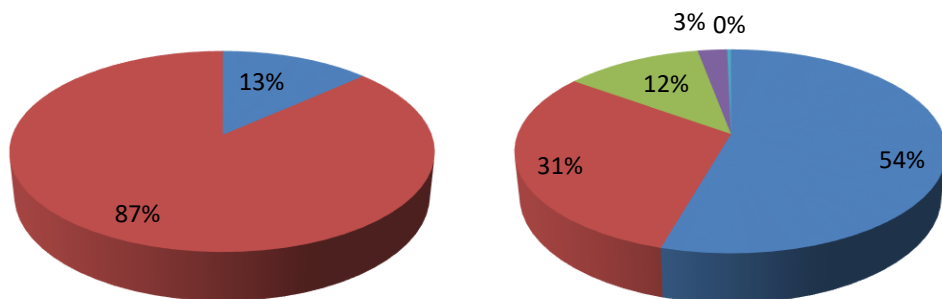
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WORLD SURFACE OLIVE TREES

■ Table Olives ■ Olive Oil

■ Europe ■ Africa ■ Asia ■ America ■ Oceania



- **11.510.015 Has. Olive Trees in the WORLD** (13,4% Table Olives and 86,6% Olive Oil).
- Europe: 54,43% (11,2% Table Olives and 88,9% Olive Oil).
- Africa: 30,53% (13,0% Table Olives and 87,0% Olive Oil).
- Asia: 12,11% (18,8% Table Olives and 81,2% Olive Oil).
- America: 2,59% (40,5% Table Olives and 59,5% Olive Oil).
- **1.541.859 Has. Olives Trees in the WORLD for Table Olives (2018).**



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WORLD, SPAIN (+ANDALUSIA) SURFACE TABLE OLIVE TREES

■ Europe ■ Africa ■ Asia ■ America ■ Oceania

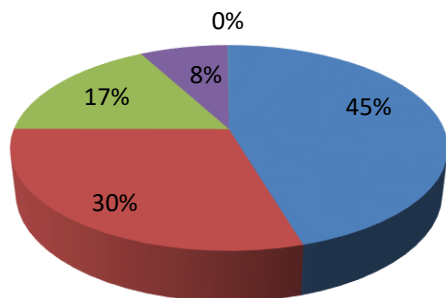


	Table Olives	
WORLD	1.541.859	100,0%
Europe	700.284	45,4%
Spain	187.232	12,1%
Andalusia	142.272	9,2%

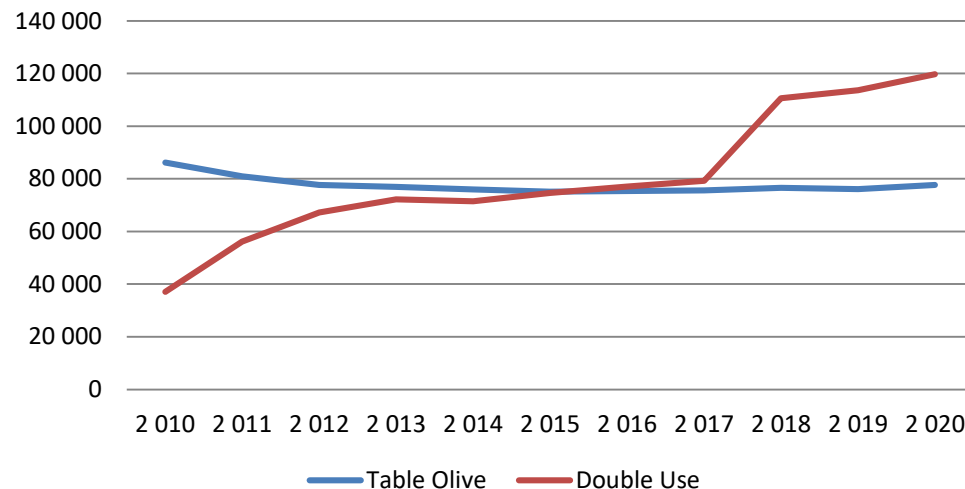
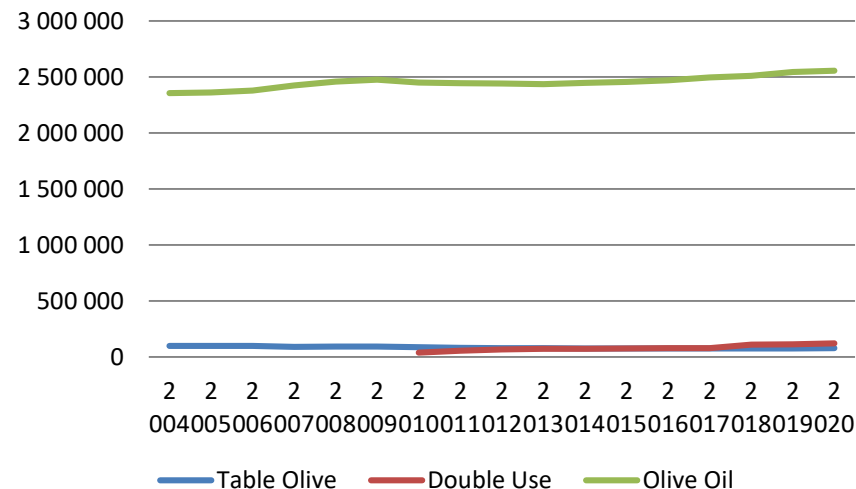
- **EUROPE** has **45,4%** of the World surface of Table Olive Trees
- **SPAIN** has **12,1%** of the World surface of Table Olive Trees
- **ANDALUSIA** has **9,2%** of the World surface of Table Olive Trees.
- **SPAIN** has 187.232 Has. Dedicated to Table Olives (2018).
- **ANDALUSIA** has 142.272 Has. Dedicated to Table Olives (2018).



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SPAIN SURFACE OLIVE TREE AND TABLE OLIVE TREE



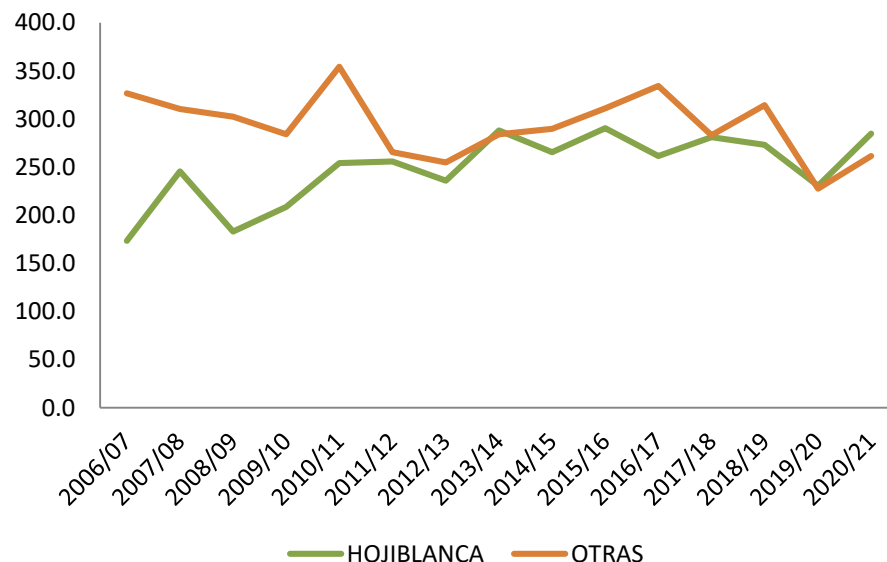
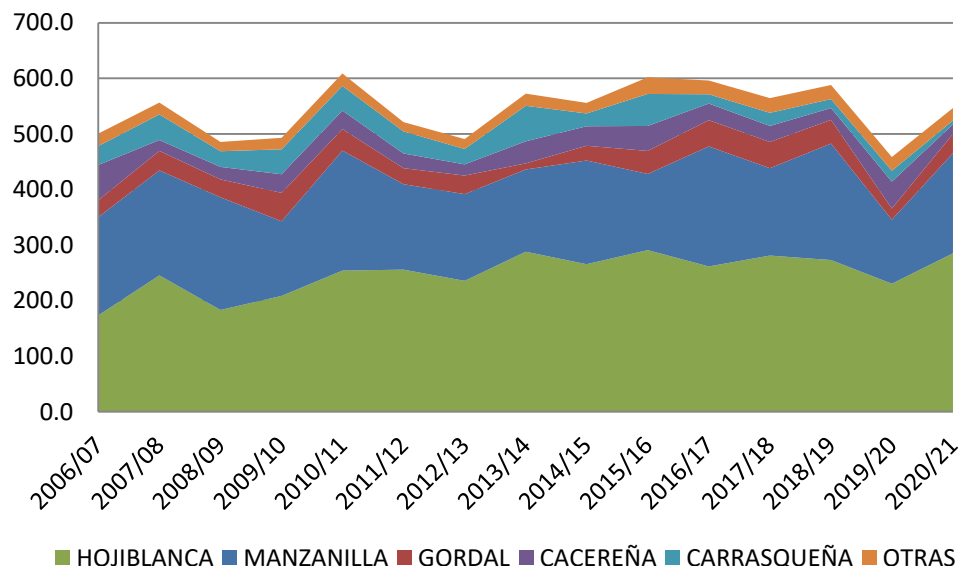
- **SPAIN has 2.751.255 Has. Of Olive Trees (2020).** 92,8% are for Olive Oil and 7,2% for Table Olives.
- **SPAIN has 197.334 Has. Of Table Olives Trees (2020).** 60,7% are Double Use and 39,3% Table Olives.
- Double Use Table olive surface has increased from 30% in 2010 to 60,7% in 2020.



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SPANISH TABLE OLIVES PRODUCTION (VARIETIES)



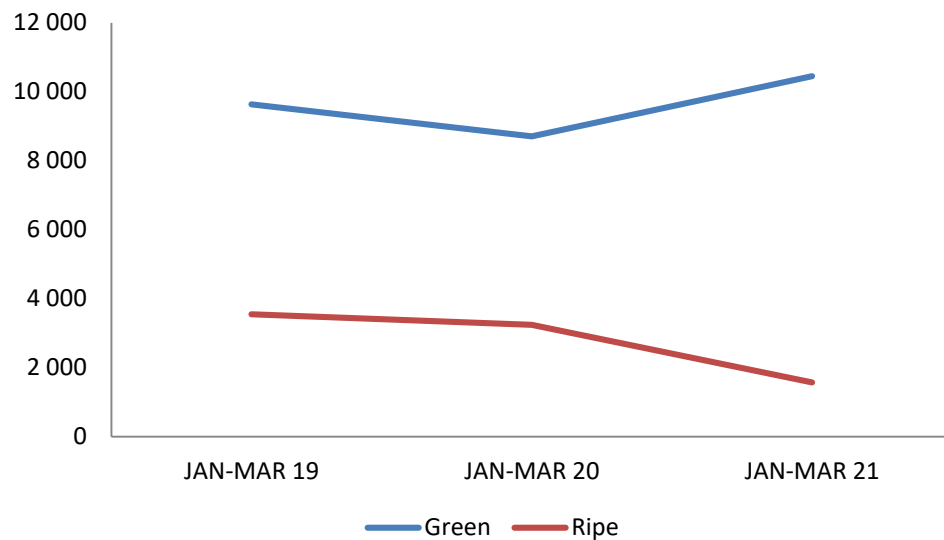
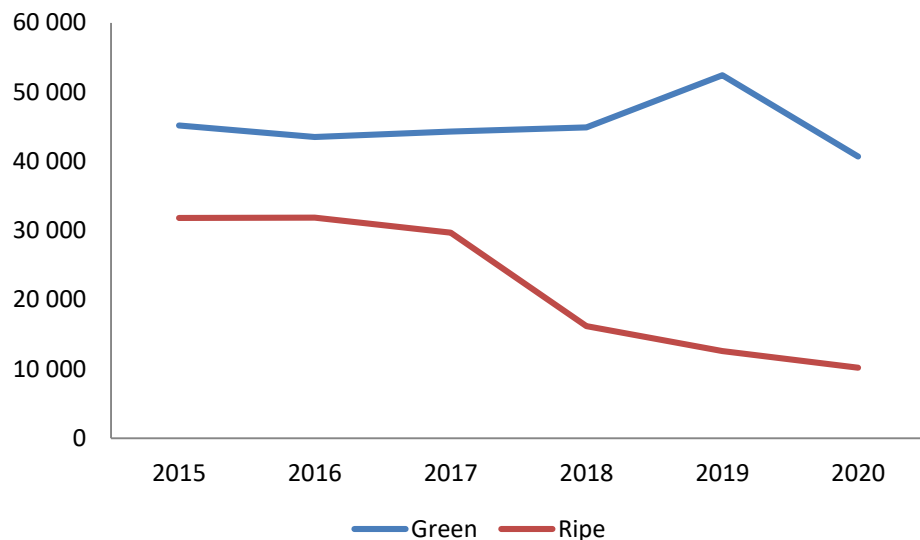
- **SPANISH** production of Table Olives is stable, with an average of 542,5 Thousand Tm. in the las 15 years.
- **SPAIN** produced 546,5 Thousand MT. Of Table Olives in 2020/21: 52,1% Hojiblanca, 33,0% Manzanilla, 6,4% Gordal, 3,2% Cacereña, 1,2% Carrasqueña and 4,1% Other.
- **HOJIBLANCA** proportion has increased from 34,8% in 2006/07 to 52,1% in 2020/21.
- **OTHER VARIETIES** proportion has decreased from 65,2% in 2006/07 to 47,9% in 2020/21.



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SPANISH EXPORTS OF TABLE OLIVES TO USA



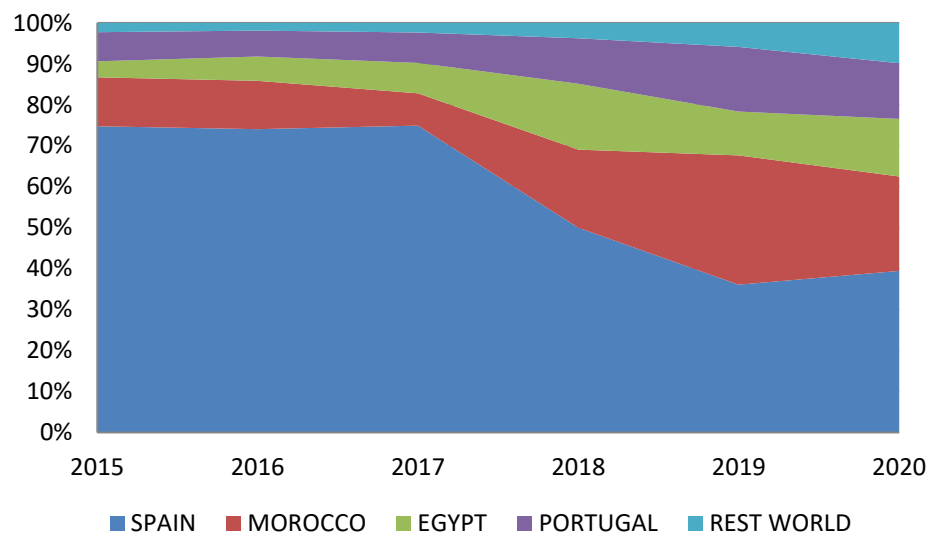
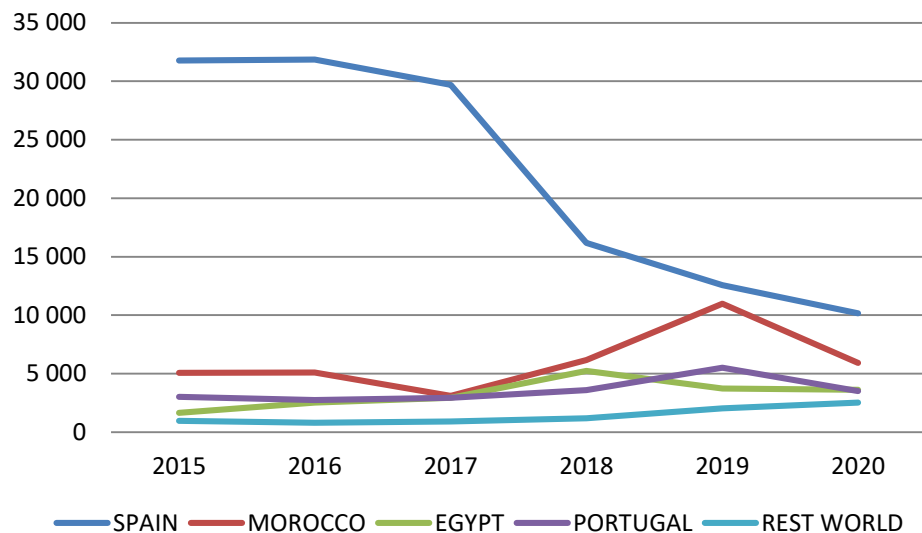
- **SPAIN exported to USA 75.366 MT. Of Table Olives in 2006 and 50.817 MT in 2020. Decrease of 32,6%**
- **RIPE OLIVES (Duty 35% from August 2007) :** SPAIN exported to USA 31.861 MT. Of Ripe Olives in 2006 and 10.153 MT in 2020. **Decrease of 68,1%.** Jan-Mar21 decrease of 51,4% compared to Jan-Mar20.
- **GREEN OLIVES (Duty 25% from October 2019 to March 2021. ¿11 June 2021?):** SPAIN exported to USA 52.400 MT. Of Green Olives in 2019 and 40.664 MT in 2020. **Decrease of 22,4%.** Jan-Mar21 increase of 20,0% compared to Jan-Mar20.



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WORLD EXPORTS OF RIPE OLIVES TO USA



- **SPAIN exports of Ripe Olives to USA have decreased 32,6% (2016-20), while other countries have increased: Morocco +16,1%, Egypt +42,6%, Portugal +28,3% and Other Countries +216,7%.**
- **SPAIN market share of Ripe Olives in USA have decreased from 74,0% to 39,5% (2016-20), while other countries have increased: Morocco 11,9% to 23,0%, Egypt 5,9% to 14,1%, Portugal 6,3% to 13,6% and Other Countries 1,9% to 9,8%.**
- **SPAIN: 34,5 Points of Market share very difficult to recover.**

SPANISH EXPORTS OF TABLE OLIVES TO GROWING MARKETS

COUNTRY	EXPORTS 11-15	EXPORTS 16-20	% INCREASE	KILO INCREASE
CHILE	691.516	1.588.692	129,74%	897.175
SOUTH KOREA	1.186.239	2.358.152	98,79%	1.171.913
ROMANIA	263.513	836.194	217,33%	572.681
IRAQ	632.084	1.343.721	112,59%	711.637
INDIA	1.056.247	1.868.686	76,92%	812.439
MEXICO	4.590.787	5.770.987	25,71%	1.180.200
UNITED KINGDOM	11.606.530	14.261.112	22,87%	2.654.582
OMAN	1.217.038	1.795.597	47,54%	578.558
SAUDI ARABIA	15.541.803	18.202.383	17,12%	2.660.580
DENMARK	1.071.448	1.433.832	33,82%	362.384
ARMENIA	751.443	1.032.338	37,38%	280.896
ITALY	30.784.373	34.016.548	10,50%	3.232.175
CZECH REPUBLIC	2.624.181	3.133.740	19,42%	509.559
CANADA	8.944.244	9.890.528	10,58%	946.284
QATAR	978.096	1.209.288	23,64%	231.192



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SPANISH EXPORTS OF TABLE OLIVES TO GROWING MARKETS

THANK YOU



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