

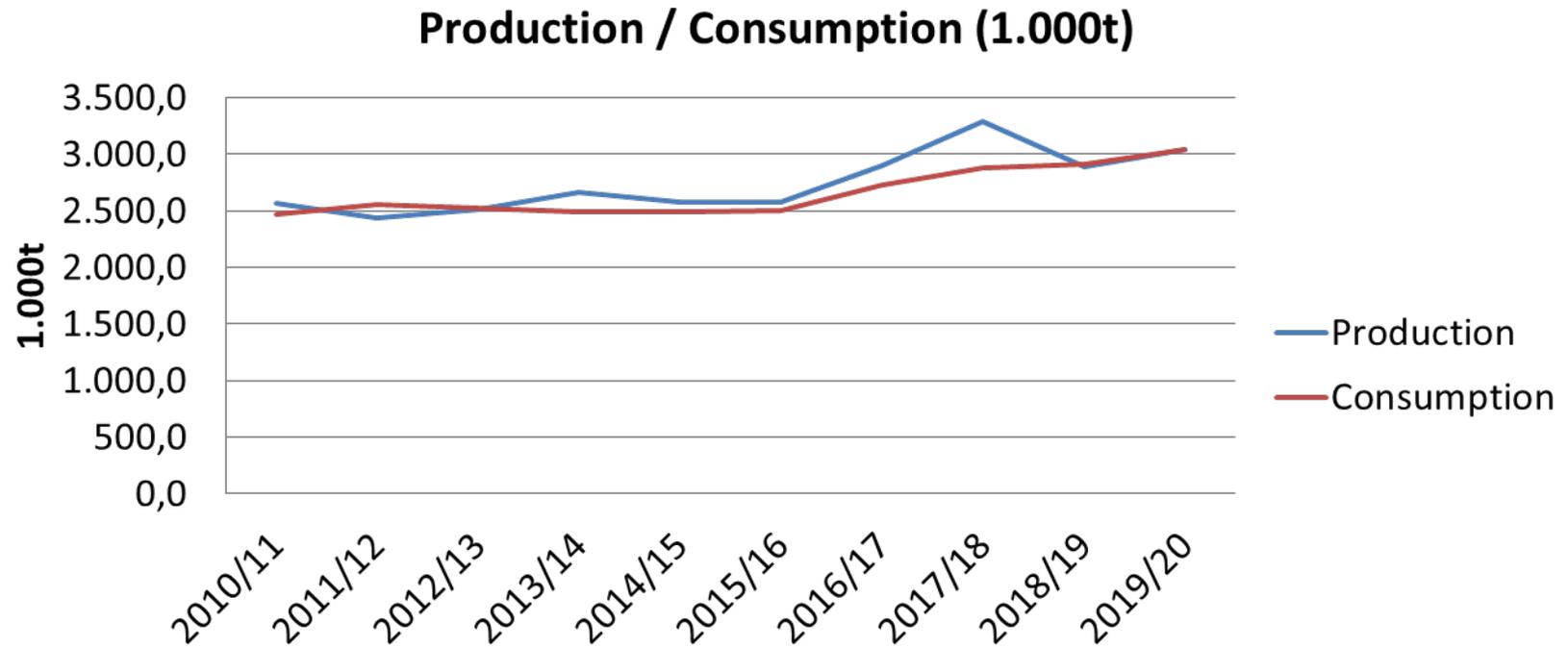
WG ON OLIVES OF THE CIVIL DIALOGUE GROUP ON HORTICULTURE, OLIVES AND SPIRITS

**Production forecast for marketing year 2020/21 and new
export markets**

13/11/2020

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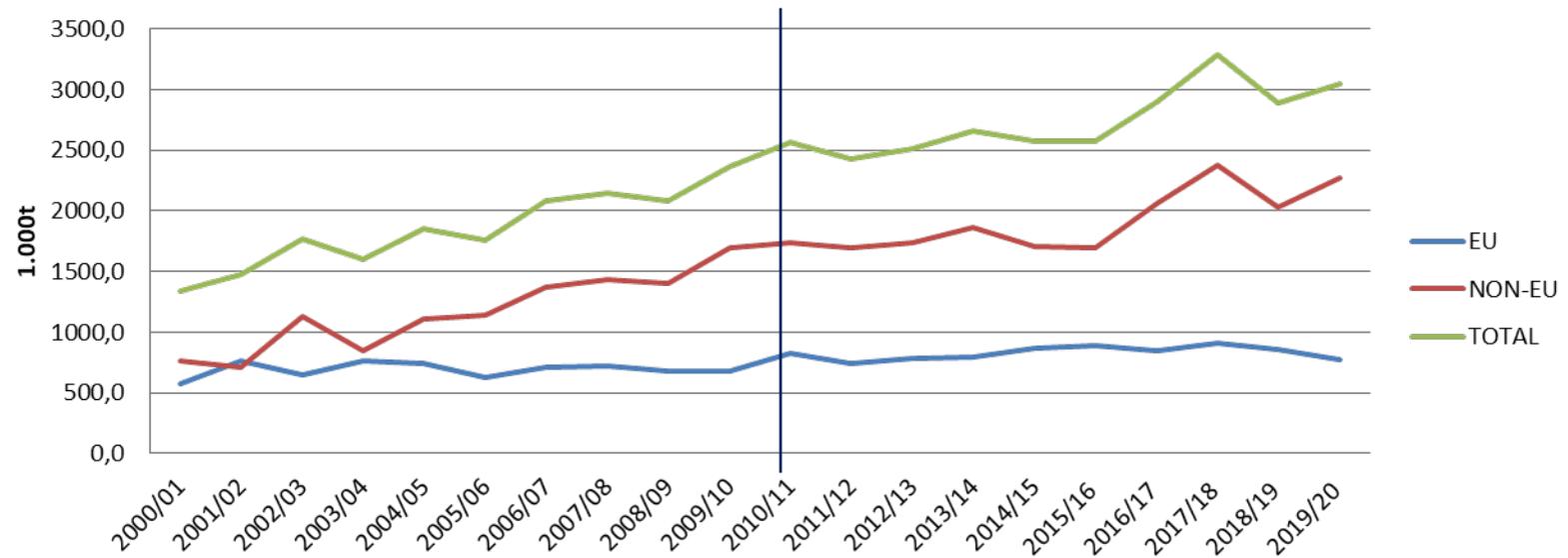


	2010/11-2014/15	vs	2015/16-2019/20	%
Avg. Production	2.548,0		2.937,7	+ 15,3
Avg. Consumption	2.504,3		2.809,5	+ 12,2

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Production: EU, NON-EU and TOTAL



	2010/11-2014/15	vs	2015/16-2019/20	%
Avg. Production EU	802,4		853,8	+ 6,4
Avg. Production NON-EU	1.745,6		2.083,9	+ 19,4
Avg. Production TOTAL	2.548,0		2.937,7	+ 15,3

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□ Where are table olives produced?

Campaign 2019/2020 (Prov) (1.000 tm)		
EU	769,0	25,29%
Spain	458,0	15,06%
Greece	222,0	7,30%
Italy	60,0	1,97%
Portugal	22,0	0,72%
Others	7,0	0,23%
Egypt	750,0	24,66%
Turkey	414,0	13,61%
Algeria	323,0	10,62%
Morocco	135,0	4,44%
Syria	100,0	3,29%
Argentina	95,0	3,12%
Iran	92,0	3,03%
USA	80,0	2,63%
Peru	50,0	1,64%
Others	233,0	7,66%
TOTAL	3.041,0	100,00%

10 countries account
for the 88% of
production

Source: IOOC

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□ Where are table olives consumed?

Campaign 2019/2020 (Prov) (1.000 tm)		
EU	585,0	19,25%
Spain	181,0	5,96%
Italy	107,0	3,52%
France	70,0	2,30%
Germany	61,0	2,01%
UK	35,8	1,18%
Others	130,2	4,28%
Egypt	650,0	21,39%
Turkey	330,0	10,86%
Algeria	325,0	10,69%
USA	220,0	7,24%
Brazil	124,0	4,08%
Syria	100,0	3,29%
Iran	90,0	2,96%
Peru	85,0	2,80%
Argentina	35,0	1,15%
Morocco	35,0	1,15%
Canada	32,0	1,05%
Saudi Arabia	32,0	1,05%
Others	396,0	13,03%
TOTAL	3.039,0	100,00%

Source: IOOC

12 countries account
for the 77% of
consumption

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□ Who imports table olives?

Campaign 2019/2020 (Prov) (1.000 tm)		
EU	100,5	16,05%
France	31,0	<i>4,95%</i>
Belgium	12,6	<i>2,01%</i>
Romania	11,1	<i>1,77%</i>
Italy	10,4	<i>1,66%</i>
Spain	9,4	<i>1,50%</i>
Greece	4,2	<i>0,67%</i>
Others	21,8	<i>3,48%</i>
USA	140,0	22,36%
Brazil	110,0	17,57%
Canada	31,0	4,95%
Saudi Arabia	28,0	4,47%
Russia	25,0	3,99%
Australia	17,5	2,80%
Chile	16,0	2,56%
Mexico	10,0	1,60%
Others	148,0	23,64%
TOTAL	626,0	100,00%

Source: IOOC

6 countries
concentrate 58% of
imports.

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□ Who exports table olives?

Campaing 2019/2020 (Prov) (1.000 tm)		
EU	286,0	39,23%
Spain	173,0	<i>23,73%</i>
Greece	80,0	<i>10,97%</i>
Portugal	16,0	<i>2,19%</i>
Italy	12,0	<i>1,65%</i>
Other	5,0	<i>0,69%</i>
Egypt	150,0	20,58%
Turkey	100,0	13,72%
Morroco	85,0	11,66%
Argentina	54,0	7,41%
Peru	25,0	3,43%
Other	29,0	3,98%
TOTAL	729,0	139,23%

Source: IOOC

Exports in table olives are relatively small: 24% of total consumption.

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Campaing 2019/2020 (Prov) (1.000 tm)		
TOTAL CONSUMPTION	3.039,00	
- Producers' countries	2.564,00	84,37%
- Non producers' countries	475,00	15,63%
UE (except Spain, Italy and Greece)	201,00	
Brazil	124,00	
Canada	32,00	
Russia	27,00	
Australia	21,50	
Others	69,50	

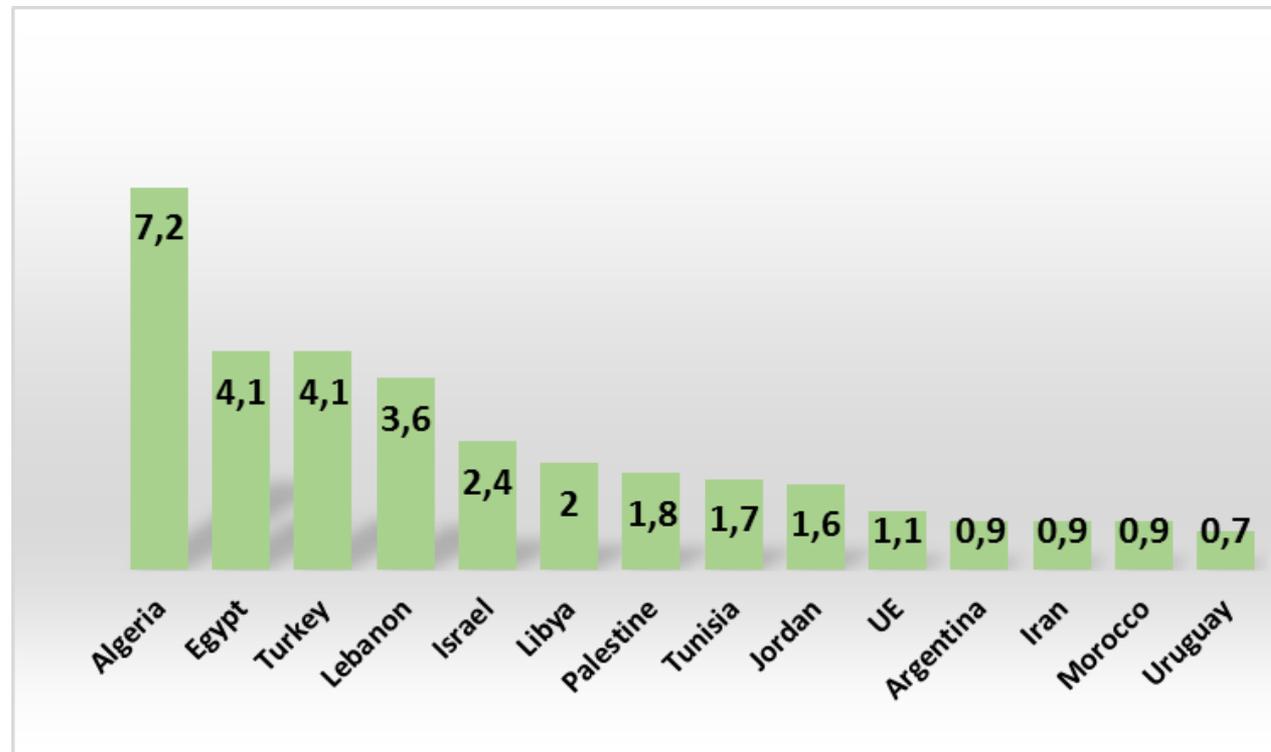
The consumption of non-producing countries represents 16% of the total.

2 countries account for the 68% of consumption of non-producers' countries

Source: IOOC

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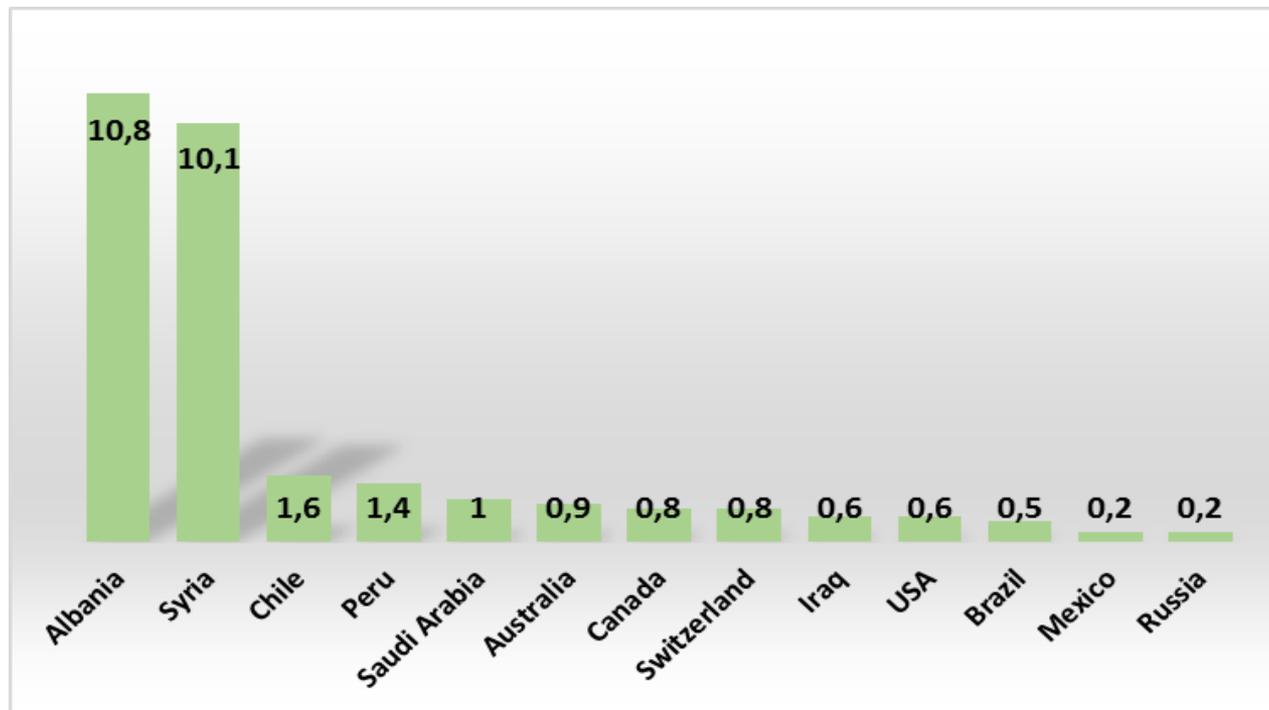
Consumption in kg of table olives per habitant per year in 2019 in IOC member countries



Source: IOOC

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Consumption in kg of table olives per habitant per year in 2019 in non-IOC member countries



Source: IOOC



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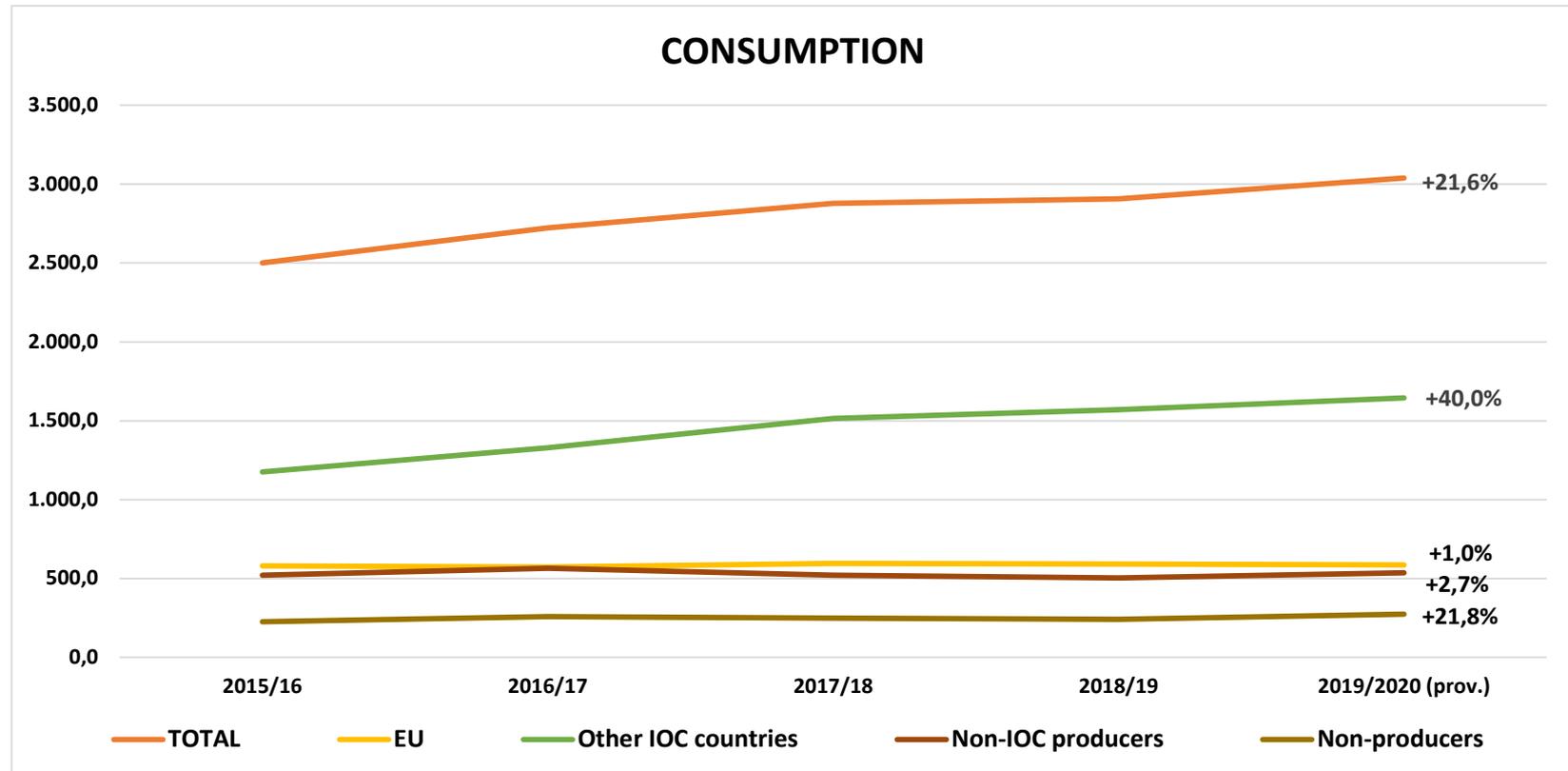
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CONSUMPTION (1.000 tm)	2015/16	2016/17	2017/18	2018/19	2019/2020 (prob.)
EU	579,0	572,0	595,0	592,0	585,0
Spain	183,0	191,0	192,0	191,0	181,0
Italy	126,0	85,0	107,0	92,0	107,0
France	65,0	65,0	65,0	70,0	0,0
Greece	15,0	15,0	16,0	15,0	9,0
Other producers	12,0	12,0	12,0	17,0	87,0
Non-producers	178,0	204,0	203,0	207,0	201,0
Other IOC countries	1.175,0	1.328,0	1.514,0	1.570,0	1.645,0
Egypt	319,0	400,0	555,0	600,0	650,0
Turkey	318,0	332,0	355,0	360,0	330,0
Algeria	234,0	297,0	300,0	305,0	325,0
Iran	58,0	71,0	55,0	75,0	90,0
Argentina	35,0	40,0	40,0	35,0	35,0
Morocco	31,0	31,0	32,0	30,0	30,0
Albania	30,0	32,0	32,0	30,0	30,0
Tunisia	23,0	20,0	25,0	24,0	30,0
Jordan	32,0	16,0	23,0	22,0	22,0
Lebanon	20,0	22,0	24,0	21,0	21,0
Non-IOC producers	521,0	565,0	520,0	504,0	535,0
USA	215,0	206,0	216,0	182,0	220,0
Syria	147,0	185,0	105,0	100,0	100,0
Peru	32,0	45,0	65,0	90,0	85,0
Saudi Arabia	30,0	32,0	32,0	31,0	32,0
Chile	28,0	28,0	30,0	32,0	30,0
Australia	18,0	22,0	21,5	22,5	21,5
México	22,0	26,0	26,0	26,0	26,0
Non-producers	225,0	258,0	248,0	240,0	274,0
Brazil	102,0	114,0	110,0	118,0	124,0
Canada	30,0	28,0	32,0	32,0	32,0
Russia	22,0	25,0	25,0	28,0	27,0
Japan	4,0	4,5	4,0	4,0	4,5
TOTAL	2.500,0	2.724,0	2.878,0	2.907,0	3.039,0

Source: IOOC

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□ CONCLUSIONS

- The table olive sector has a great stability.
- The EU lost the leadership in production of table olives 20 years ago.
- 88% of production is concentrated in 10 countries.
- Nearly 77% of consumption is concentrated in 12 countries, mainly producers.
- 6 countries concentrate 58% of imports.
- World trade in table olives is relatively small: 24% of total consumption.
- The consumption of non-producing countries represents 16% of the total.
- 2 countries account for the 68% of consumption of non-producer countries
- Consumption of table olives per habitant is very low, except in the large producing countries.
- Total consumption has grown 22% in the last five years due to the growth of the producing countries, +40%.

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THANK YOU

ASEMESA – Mesón del Moro, 1 – 41004 Sevilla – Tel. +34 954 229 485 – Fax +34 954 223 261 –
Mail: asemesa@asemesa.es – Web: www.asemesa.es