

Brussels, 14/09/2018  
[agri.ddg3.i.4\(2018\)5285511](#)

## MINUTES

*Meeting of the Civil Dialogue Groups Horticulture, Olives & Spirits,*

*OLIVES Sector*

*Date: 25/5/2018*

Chair: Mr Rafael SANCHEZ de PUERTA DIAZ (COGECA)

Organisations present: All Organisations were present, except EFNCP, EPHA, OEIT, PAN Europe, SACAR.

### 1. Approval of the agenda and of the minutes of the previous meeting

The agenda of the meeting was approved as well as the minutes of the previous meeting.

### 2. Nature of the meeting

The meeting was non-public.

### 3. List of points discussed

#### a. Market situation in the Olive oil and Table olives sectors

##### i. Official data from the European Commission (DG AGRI)

The European Commission (COM) presented the latest official data on the 2017/2018 campaign:

- **EU production** raised by 23% compared to previous year due to better weather conditions in IT and EL and a higher production than initially expected in ES and PT;
- **Non-EU countries** also saw an increase of production, notably Tunisia (280,000 tons), Turkey (263,000), Morocco (240,000) and Syria (100,000);
- **Trade figures** show a considerable increase of EU imports of extra virgin olive oil (EV OO) in the first six months of 2018, mainly coming from Tunisia (92% of total imports) and directed to Italy (54%) and Spain (22%). This is the consequence of recovery on Tunisian production;
- The **quota** allocated for **Tunisia** was already filled in the first week of 2018;
- **EU export** are 6% less than last year with -19% for the US and an exception for Brazil, which increases its imports of 57%;
- **Intra-EU trade** also decreased (-27%) with prices below last year levels;
- Prices currently stand between 30-40% below last year levels and well below 5-year averages.
- **Table olives** production is on the rise globally with the EU keeping the highest share of the market (29%) followed by Egypt (22%);

- A decline of **table olives export** to the US has been observed; however it is not sure whether it is a direct consequence of the additional duties levied by the US customs (since February) or if it is also a trend that started already in 2017.

ii. Round table

- **FoodDrinkEurope** (FDE) warned that table olives production data from third countries might not necessarily be valid and particularly those for Egypt might have been inflated.
- **COPA-COGECA** (CC) highlighted that recent weather conditions in Spain might have an impact on the yield for next harvest, he observed a difficult situation on the Spanish market due to low prices and foresaw higher stocks than last year.
- **FDE** highlighted the difficulty of placing the products at the right price, considered the competition of other vegetable oils.

b. State of play on Xylella fastidiosa

i. Presentation from the COM (DG SANTE)

The COM provided an update of *Xylella fastidiosa* in the EU:

- In Germany, the isolated outbreak of *X. fastidiosa* subsp. *fastidiosa* was declared as eradicated in March 2018.
- In France, eradication measures are ongoing in PACA region where *X. fastidiosa* subsp. *multiplex* has been detected, with one isolated case of *X. fastidiosa* subsp. *pauca* in Menton. Containment measures are in place in Corsica since December 2017 where *X. fastidiosa* subsp. *multiplex* is present.
- In Spain, eradication measures are currently being taken in Alicante (Autonomous Region of Valencia) and in a new outbreak located in the Autonomous Region of Madrid. In both cases, *X. fastidiosa* subsp. *multiplex* has been detected although affecting different host plants; in Madrid olives while in Alicante almonds. Since December 2017, the entire territory of Balears is instead declared as area under containment.
- As regards Italy, the Commission informed that the PAFF Committee of May 2018 endorsed the extension of the current demarcated area by around 20 km towards the north of the Apulia region to prevent further spread of the pest.
- The group was informed about the Ministerial conference organised in Paris on 1 December 2017 with a road map, publically available, that is currently being implemented by the Commission and Member States.

ii. Round table

- **BIRDLIFE** insisted on the need for preserving biodiversity from eradication measures and treatments;
- **COPA-COGECA** supported the need for a EU monitoring of *Xylella* and insisted on the need for EU financial support for the affected farmers;
- **BEUC** expressed concerns about the risk of further spread of *Xylella* in Apulia and affirmed the need of implementing strict control measures;
- The COM specified that the case in Almeria is currently treated by the Spanish Authorities as an interception of trade and not as outbreak (*Polygala myrtifolia* found infected in a nursery), based on current information. No demarcated area has been established;
- The COM informed that at the present time no infected plants have been notified by the Italian Authorities in the Province of Bari (Italy);
- The COM informed the EU financial support is available for affected farmers, but compliance with the EU *Xylella* legislation is important.

- The COM insisted on the importance of science based communication on Xylella, immediate reporting of any suspected symptoms and early actions for successful eradication.
- c. Consumption trends in the EU.
- i. Presentation from the FDE (Mr. Forcella, FEDEROLIO)
- World consumption level is steady with 2,950,000 tons per year.
  - Germany levels are also steady but low, therefore more incisive actions have to be deployed in this market.
  - Non domestic use of OO becomes more and more popular in Italy with direct selling still performing.
- ii. Round table
- **FDE** insisted on the need to do more promotion activities in and outside the EU, because of the decline in consumption, and informed the members that a study on consumption will be released by the International Olive Oil Council (IOC).
  - **FDE** highlighted a decrease in consumption also in Greece, where the problem of illegal OO is affecting the market.
  - **CC** showed concerns regarding the current campaign in Spain because of a delay of the blossoming.
  - **IFOAM** stressed the need to have data on organic OO.
  - **BEUC** asked that information campaigns are organised in the EU market as regards to OO quality.
  - The COM highlighted the different elasticity of demand in EU countries, depending if they have more or less consumption per capita.
- d. US duties on Spanish ripe olives
- i. Presentation from the COM (DG TRADE)
- The COM informed the members on the verification visits conducted by US officials in Brussels and Spain (Madrid and Sevilla). Contrary to the verification visit in Brussels, the verification visits in Madrid and Sevilla did not go perfectly well. The COM and the Spanish government gave US authorities all the relevant information (some SP information was rejected) and pointed out to some serious procedural and content mistakes relating to the investigation.
  - US authorities are preparing the final CVD and AD determinations which are expected on 12 June.
- ii. Round table
- **FDE** asked the COM that EU diplomacy helps the sector fixing the problem and urged to do so before this spills over to other commodities.
  - The COM confirmed the support of Commissioners Malmström and Hogan, and highlighted that the US could also be attacked on the aids they grant to their national agricultural sector.
- e. The future Common Agricultural Policy
- i. Presentation of the COM (DG AGRI)

The COM presented the outline of the future CAP and its general policy directions aiming for better support, knowledge and subsidiarity between the EU and MS.

**f. Reorganisation of the Civil Dialogue Group**

The COM informed the members on some changes in certain groups aiming to rationalise the use of Commission resources and to take into account the creation of market observatories. The CDG OO should be reduced to half day to be held twice per year. However a specific Working Group (WG) on olive oil market issues will be created. The WG would take place next time after the CDG. The governance rules of the WG will be drafted by the COM in the coming weeks.

**g. New AGM system**

The COM informed the members of the new system for registering to CDG meetings and claim the reimbursement.

**h. IOC meetings outcome: testing panel and other items**

The COM informed the members on the ongoing amendment of Regulation 29/2012 on labelling issues as well as on main developments in the IOC activity on the OO standard and on the process of review of the CODEX standard.

The President informed the members that at the meeting of the Advisory Group of the IOC the main topic of discussion was the panel test system. The Italian delegations prepared a reflection text that was not disseminated by the IOC Secretariat. All delegations confirmed the need to keep the organoleptic tests with some enhancements. Further works on the topic will be conducted by the IOC.

**i. AOB**

**4. Conclusions/recommendations/opinions**

**5. Next steps**

- The COM will circulate the draft terms of reference of the newly established WG.

**6. Next meeting**

The next meeting is scheduled for 9 October 2018.

List of participants– Minutes  
*Civil Dialogue Group HOS – Sector Olives*  
 Date: 25/05/2018

MEMBER ORGANISATION	NAME	FIRST NAME
<b>Bureau Européen des Unions des Consommateurs (BEUC)</b>	MELISSANO	Marino
<b>European Coordination Via Campesina (ECVC)</b>	COSTA PINTO	Lucinda Maria
<b>European Coordination Via Campesina (ECVC)</b>	MESA MORA	José Antonio
<b>European Council of Young Farmers (CEJA)</b>	DEL MORAL	Miguel
<b>European Council of Young Farmers (CEJA)</b>	CORRALES CIGANDA	Gonzalo
<b>European Liaison Committee for Agriculture and agri-food trade (CELCAA)</b>	FORCELLA	Tullio
<b>European Liaison Committee for Agriculture and agri-food trade (CELCAA)</b>	ASPAR	Jean-Michel
<b>European Federation of Food, Agriculture and Tourism Trade Unions (EFFAT)</b>	LAHITA CABRERA	ANGEL
<b>European agri-cooperatives (COGECA)</b>	HODALIC	Tomislava
<b>European agri-cooperatives (COGECA)</b>	PYRGIOTIS	Vasileios
<b>European agri-cooperatives (COGECA)</b>	GUILLAUMIN	YVES
<b>European agri-cooperatives (COGECA)</b>	MIRIZZI	Francesco
<b>European agri-cooperatives (COGECA)</b>	SANCHEZ DE PUERTA	RAFAEL
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<b>European agri-cooperatives (COGECA)</b>	CORBALAN	JUAN
<b>European agri-cooperatives (COGECA)</b>	PINATEL	ANDRE
<b>European agri-cooperatives (COGECA)</b>	FALCAO	Patrícia
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<b>European farmers (COPA)</b>	ESPOSITO	Palma
<b>European farmers (COPA)</b>	MAGARAGGIA	Paolo
<b>European farmers (COPA)</b>	RUFOLO	Anna
<b>European farmers (COPA)</b>	CANO MARTIN	Cristobal
<b>European farmers (COPA)</b>	MATEOS GARCIA	Carlos
<b>European farmers (COPA)</b>	GALLEGO MARTINEZ	Cristobal

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International Federation of Organic Agriculture Movements EU Regional Group (IFOAM EU Group)	DIMITRIADIS	Konstantinos
Stichting BirdLife Europe (BirdLife Europe)	RUIZ GONZÁLEZ	Carlos
	<i>TOTAL</i>	36