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WG Olives Market Situation and Technical Issues

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Adjunto al Secretario General. ASEMESA.

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WG OLIVES MARKET SITUATION AND TECHNICAL ISSUES

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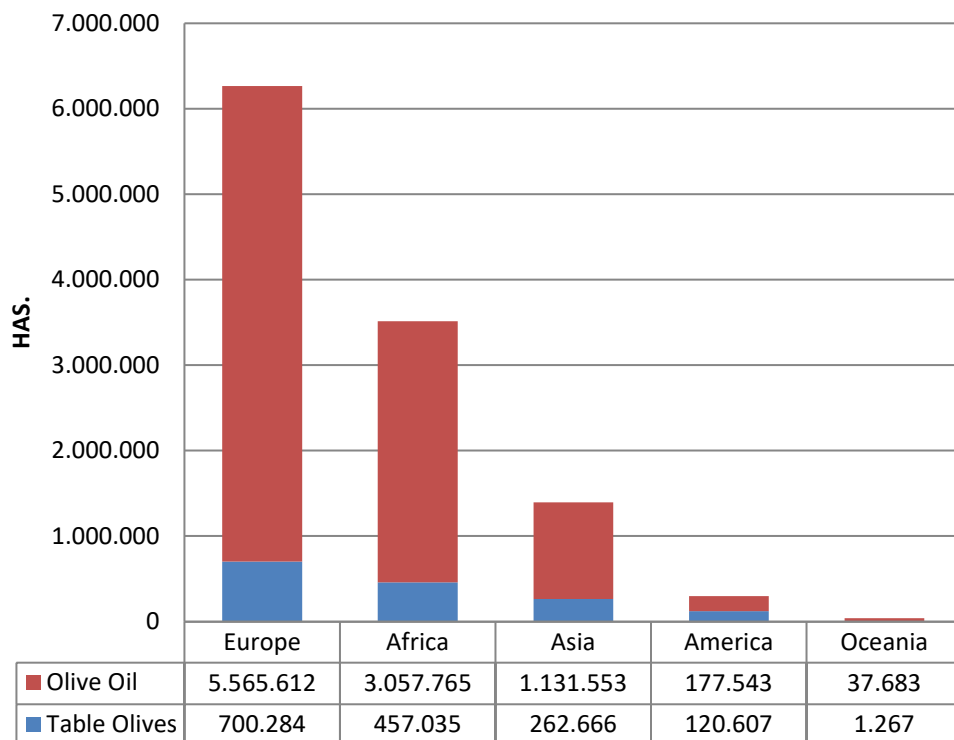
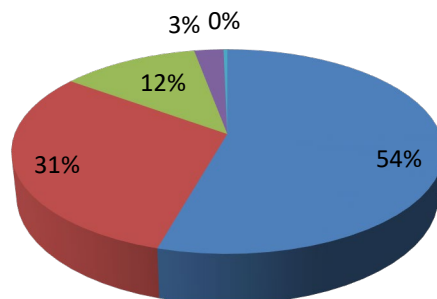
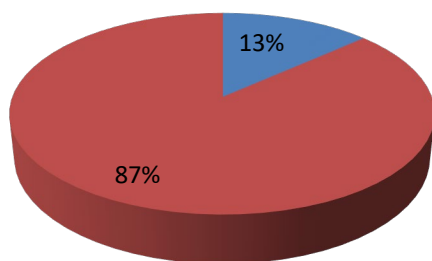
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WORLD SURFACE OLIVE TREES

■ 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):** Spain, Italy, Greece, Turkey and Portugal
- **Africa: 30,53% (13,0% Table Olives and 87,0% Olive Oil):** Tunisia, Morocco, Algeria, Egypt and Libya.
- **Asia: 12,11% (18,8% Table Olives and 81,2% Olive Oil):** Syria, Iran, Jordan, China and Palestina.
- **America: 2,59% (40,5% Table Olives and 59,5% Olive Oil):** Argentina, USA, Chile, Peru and México.
- **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

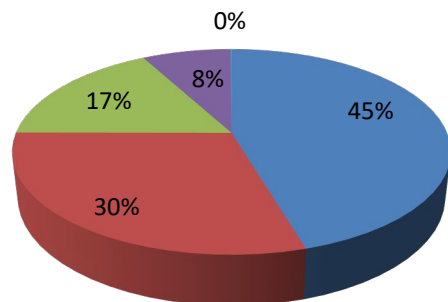


	Table Olives	
WORLD	1.541.859	100,0%
Europe	700.284	45,4%
Spain	187.232	12,1%
Andalusia	142.272	9,2%

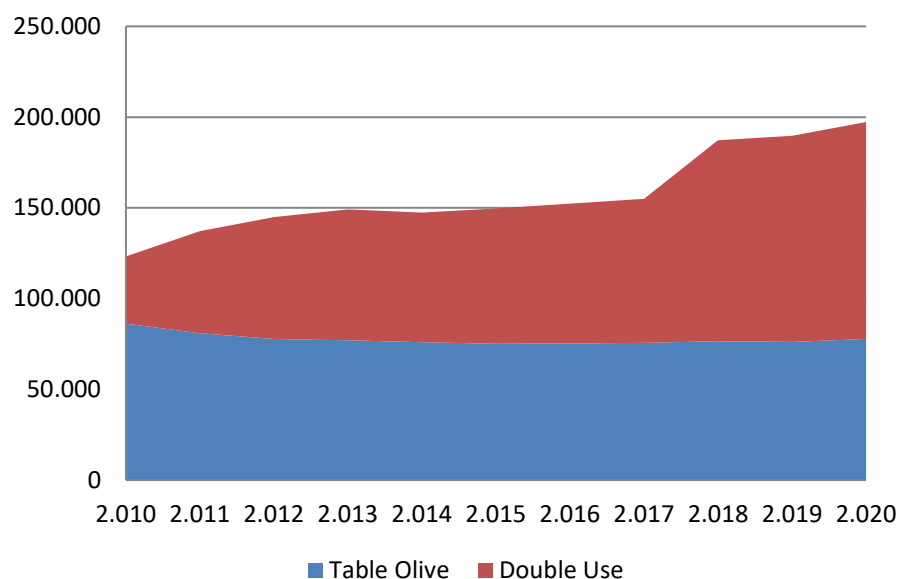
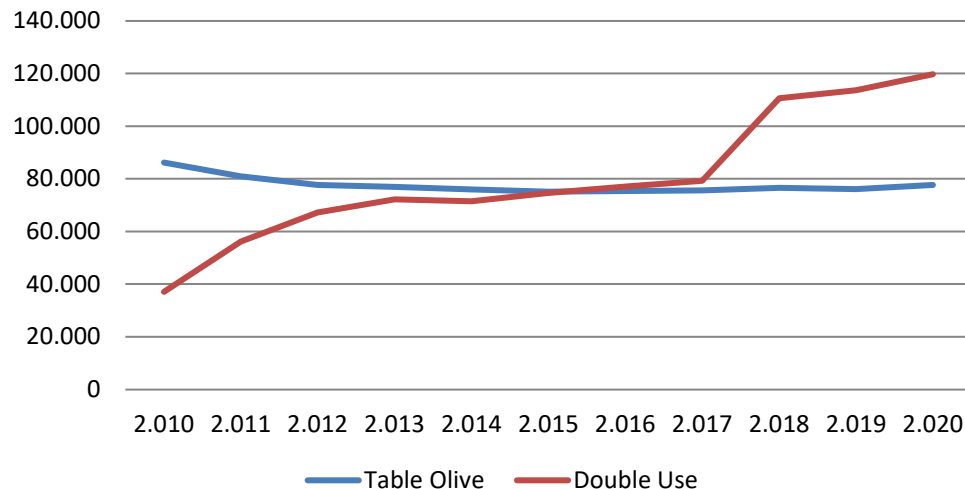
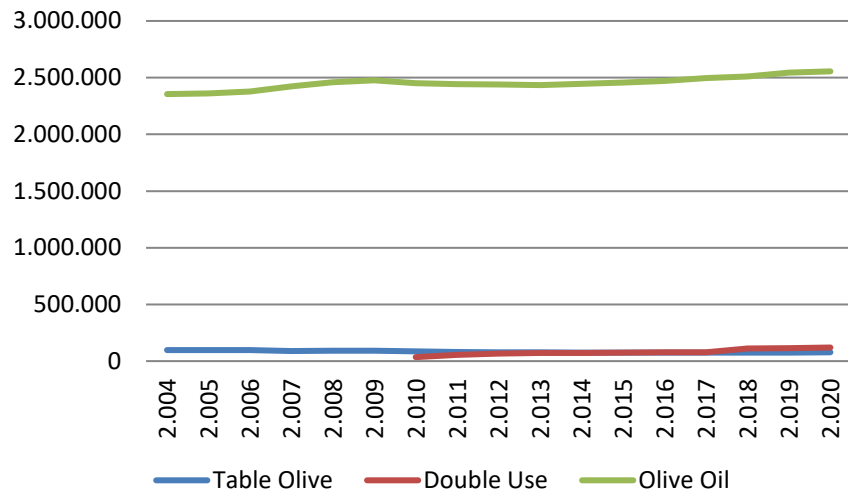
- **EUROPE** has **45,4% of the World surface of Table Olive Trees** (Africa: 29,64%, Asia: 17,04%, America: 7,82%, Oceania: 0,08%).
- **SPAIN** has **12,1% of the World surface of Table Olive Trees** (Turkey 17,8%, Greece 9,3%, Italy 2,1%, Portugal 0,9%).
- **ANDALUSIA** has **9,2% of the World surface 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



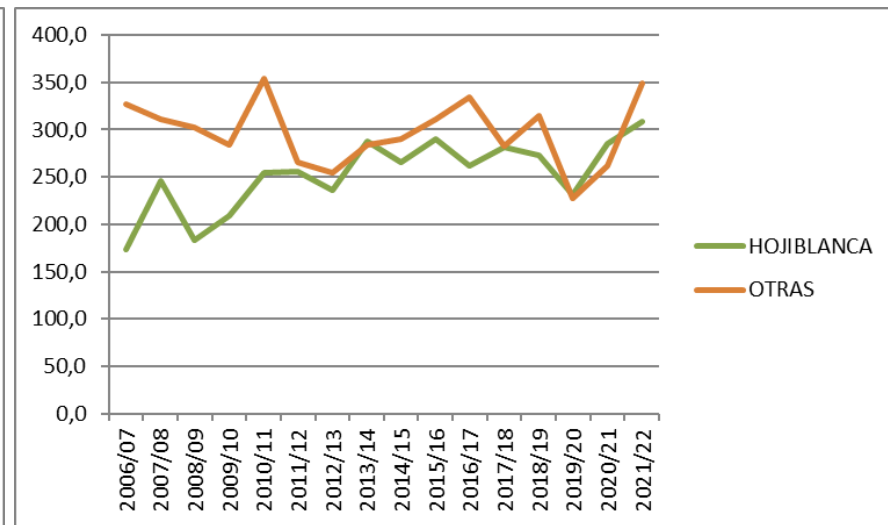
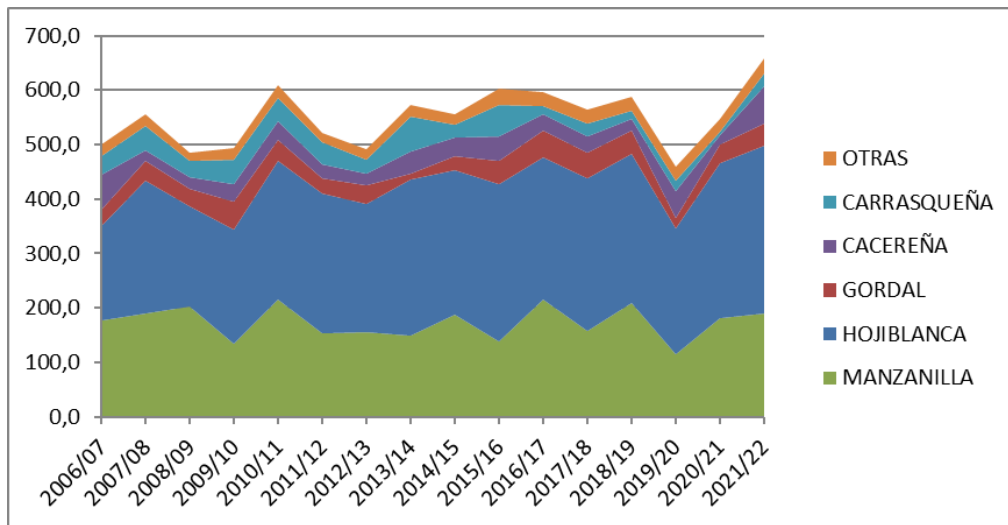
- **SPAIN has 2.751.255 Has. Of Olive Trees (2020) (7% increase in last 10 years).** 92,8% are for Olive Oil (4% increase) and 7,2% for Table Olives (60% increase).
- **SPAIN has 197.334 Has. Of Table Olives Trees (2020).** 60,7% are Double Use and 39,3% Table Olives.
- Double Use Table olive surface has increased from 30% in 2010 to 60,7% in 2020.



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SPANISH TABLE OLIVES PRODUCTION (VARIETIES)



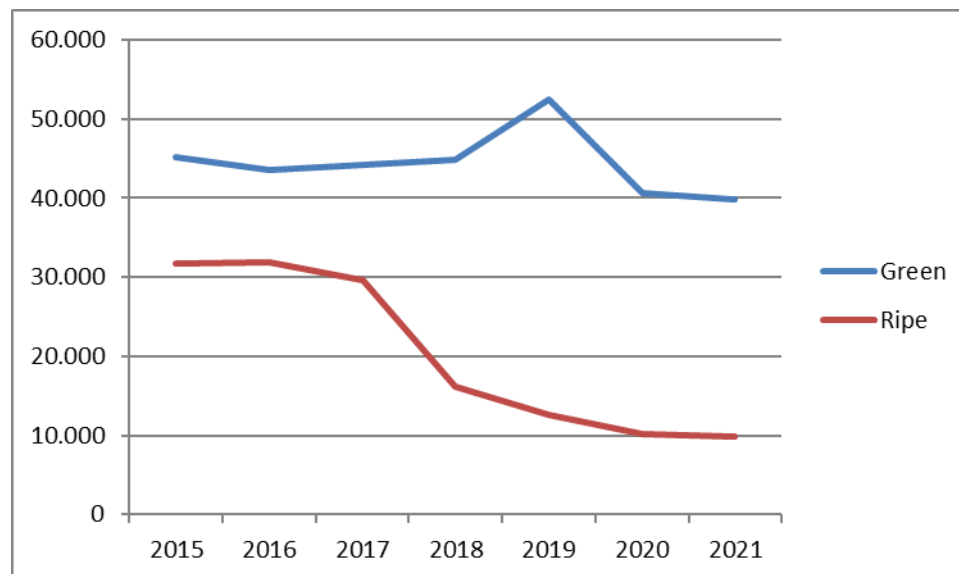
- **SPANISH** production of Table Olives is stable, with an average of 553,1 Thousand Tm. in the las 15 years.
- **SPAIN** produced 657,7 Thousand MT. Of Table Olives in 2021/22: 46,9% Hojiblanca, 28,8% Manzanilla, 6,2% Gordal, 10,2% Cacereña, 3,7% Carrasqueña and 4,1% Others.
- **HOJIBLANCA** proportion has increased from 44,2% in 2007/08 to 46,9% in 2021/22.
- **OTHER VARIETIES** proportion has decreased from 55,8% in 2007/08 to 53,1% in 2021/22.



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SPANISH EXPORTS OF TABLE OLIVES TO USA



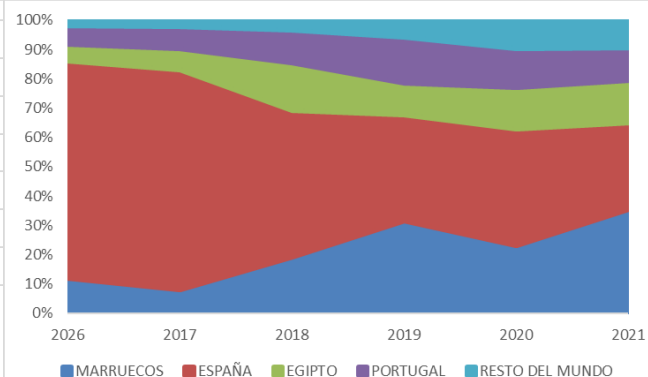
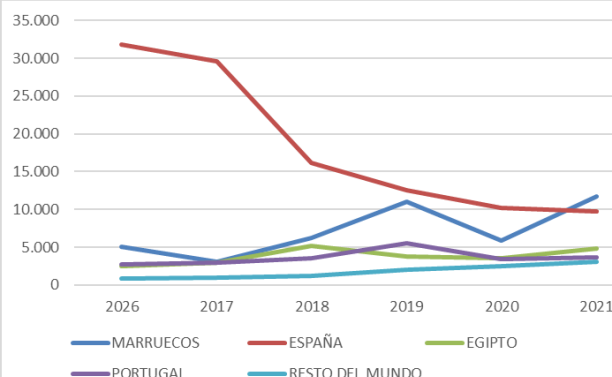
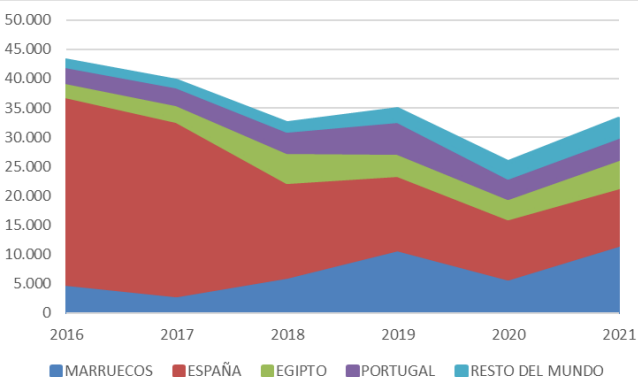
- **SPAIN** exported to USA 75.366 MT. Of Table Olives in 2016 and 49.674 MT in 2021. **Decrease of 34,1%** in 5 years.
- **RIPE OLIVES (Duty 35% from August 2007)** : SPAIN exported to USA 31.861 MT. Of Ripe Olives in 2016 and 9.769 MT in 2021. **Decrease of 69,3%**. Loss of 180MM\$ in 5 years.
- **GREEN OLIVES (Duty 25% from October 2019 to March 2021.)**: SPAIN exported to USA 52.400 MT. Of Green Olives in 2019 and 39.905 MT in 2021. **Decrease of 23,9%**. Loss of 25MM\$ in 2 years.



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WORLD EXPORTS OF RIPE OLIVES TO USA



- In 2016-21 period, the World Imports of Ripe Olives from USA has decreased 22,9%, from 43MM kilo to 33,1MM kilo.
- SPAIN exports of Ripe Olives to USA have decreased 69,3% (2016-21), while other countries have increased 109,9%: Morocco +129,9%, Egypt +91,8%, Portugal +36,1% and Other Countries (Turkey, Greece, Italy, etc.) +291,4%.
- SPAIN market share of Ripe Olives in USA have decreased form 74,1% to 20,5% (2016-21), while other countries have increased: Morocco 11,9% to 35,4%, Egypt 5,9% to 14,5%, Portugal 6,3% to 11,2% and Other Countires (Turkey, Greece, Italy, etc.) 1,9% to 9,4%.
- SPAIN: 53,5 Points of Market share very difficult to recover.



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SPANISH EXPORTS OF TABLE OLIVES TO GROWING MARKETS

COUNTRY	EXPORTS 2012-16	EXPORTS 2017-21	% INCREASE	KILO INCREASE
COREA DEL SUR	1.382.534	2.854.281	106,45%	1.471.747
CHILE	769.871	1.936.956	151,59%	1.167.085
IRAQ	766.481	1.349.296	76,04%	582.815
RUMANIA	445.845	951.297	113,37%	505.452
INDIA	1.299.098	1.850.487	42,44%	551.390
REINO UNIDO	13.217.182	14.429.464	9,17%	1.212.283
MEXICO	5.016.287	5.684.634	13,32%	668.347
ÓMAN	1.420.587	1.805.787	27,12%	385.200
PAKISTÁN	347.260	593.791	70,99%	246.531
ARMENIA	803.556	1.070.131	33,17%	266.575
BELGICA	1.856.535	2.144.287	15,50%	287.752
ESLOVAQUIA	700.408	880.423	25,70%	180.015
ITALIA	32.491.776	33.780.924	3,97%	1.289.149
QATAR	1.055.747	1.228.107	16,33%	172.360
ARABIA SAUDÍ	16.883.276	17.873.333	5,86%	990.057
CANADÁ	9.438.038	10.068.112	6,68%	630.074
POLONIA	7.654.846	8.233.680	7,56%	578.834



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SPANISH EXPORTS OF TABLE OLIVES TO GROWING MARKETS

THANK YOU!



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