



European  
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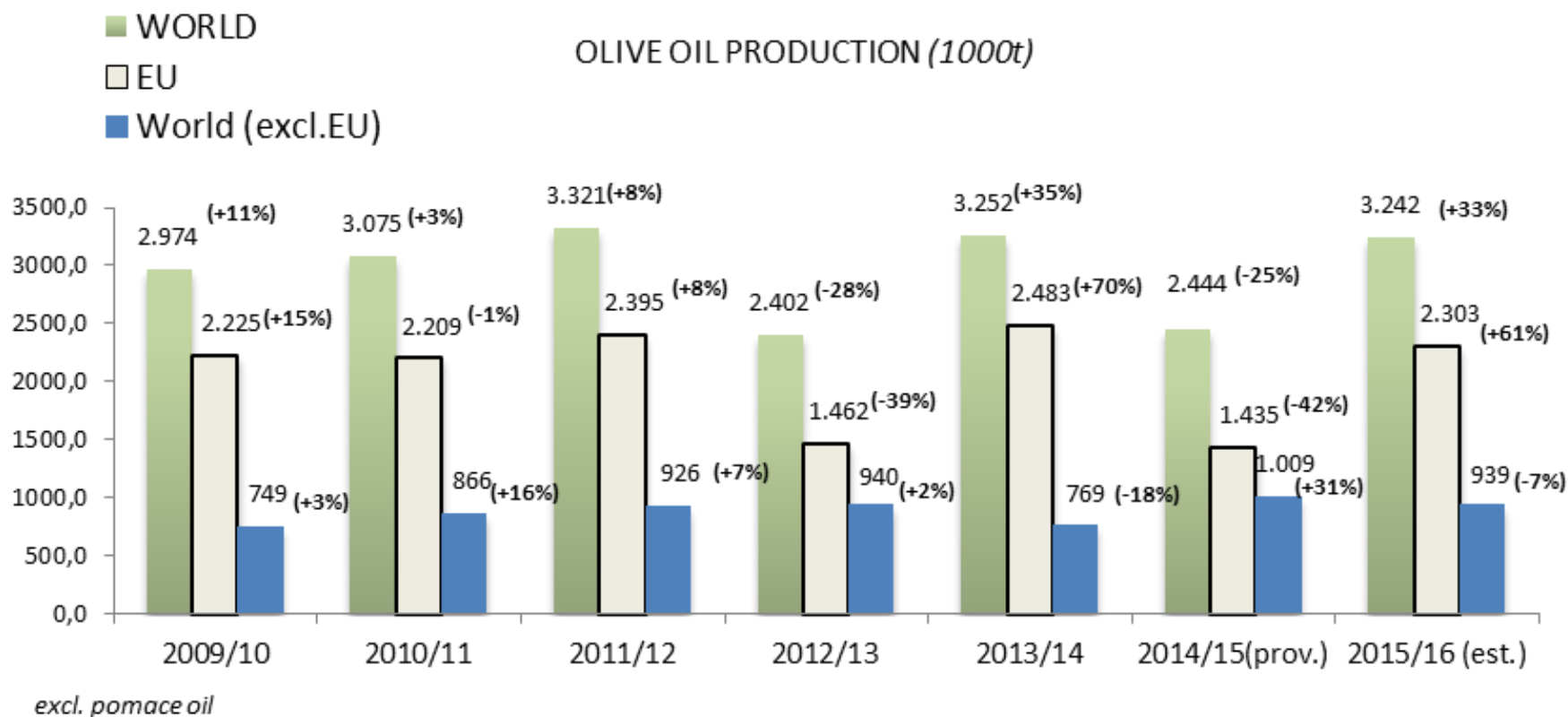
# Market situation in the Olive oil and Table olives sectors

*CDG - Horticulture, Olives and Spirits  
"OLIVES Sector "*

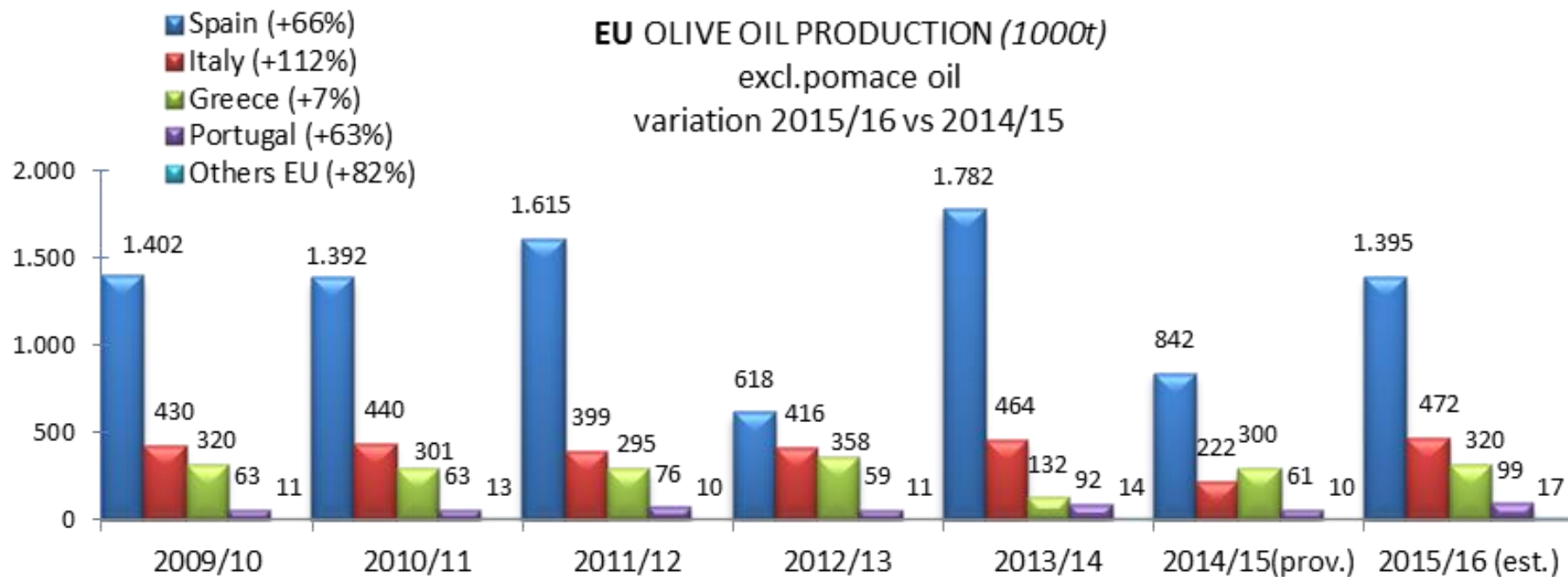
*Brussels, 27 May 2016*

*Lucie Zolichová, AGRI C.2  
lucie.zolichova@ec.europa.eu*

# OLIVE OIL PRODUCTION



Source: IOC & MS declarations  
Data on non-EU production to be revised by the IOC in June 2016



Source: MS declarations; excl. pomace oil

## MONTHLY EU OLIVE OIL PRODUCTION

Source: MS declarations - Annexe III point A b) et c) du règlement (CE) n° 826/2008 - Annex III point A b) and c) of Regulation (EC) No 826/2008 (\*)

(tonnes)

2015/2016	EL	ES	FR	IT	CY	MT	PT	SI	HR	TOTAL
September				344		6				350
October	2.265	22.700	493	47.596	755	32	13.805	250	1.500	89.396
November	46.800	259.400	2.120	162.711	2.240	3,4	45.885	240	2.500	521.900
December	94.723	604.300	1.474	146.746	2.150	0,4	35.755		500	885.649
January	98.124	363.100	491	77.632	1.275		3.875			544.498
February	42.044	114.000	268	26.214	510					183.037
March	18.311	26.571	25	8.024	20					52.951
April	15.263	3.501		2.384						21.148
May										0
June										0
<b>Total</b>	317.530	1.393.572	4.872	471.652	6.950	42	99.320	490	4.500	2.298.928
<b>Production Estimation 2015/16</b>	<b>320.000</b>	<b>1.395.000</b>	<b>5.400</b>	<b>471.652</b>	<b>6.950</b>	<b>41,8</b>	<b>99.320</b>	<b>490</b>	<b>4.500</b>	<b>2.303.354</b>
Consumption Estimation 2015/16	140.000	500.000	95	605.794	5.600	41,8	70.000	2.000	7.500	1.331.031
Final Stock Estimation 2015/16	51.000	325.700	1.400	38.400	1.200	0	5.000	0	0	422.700

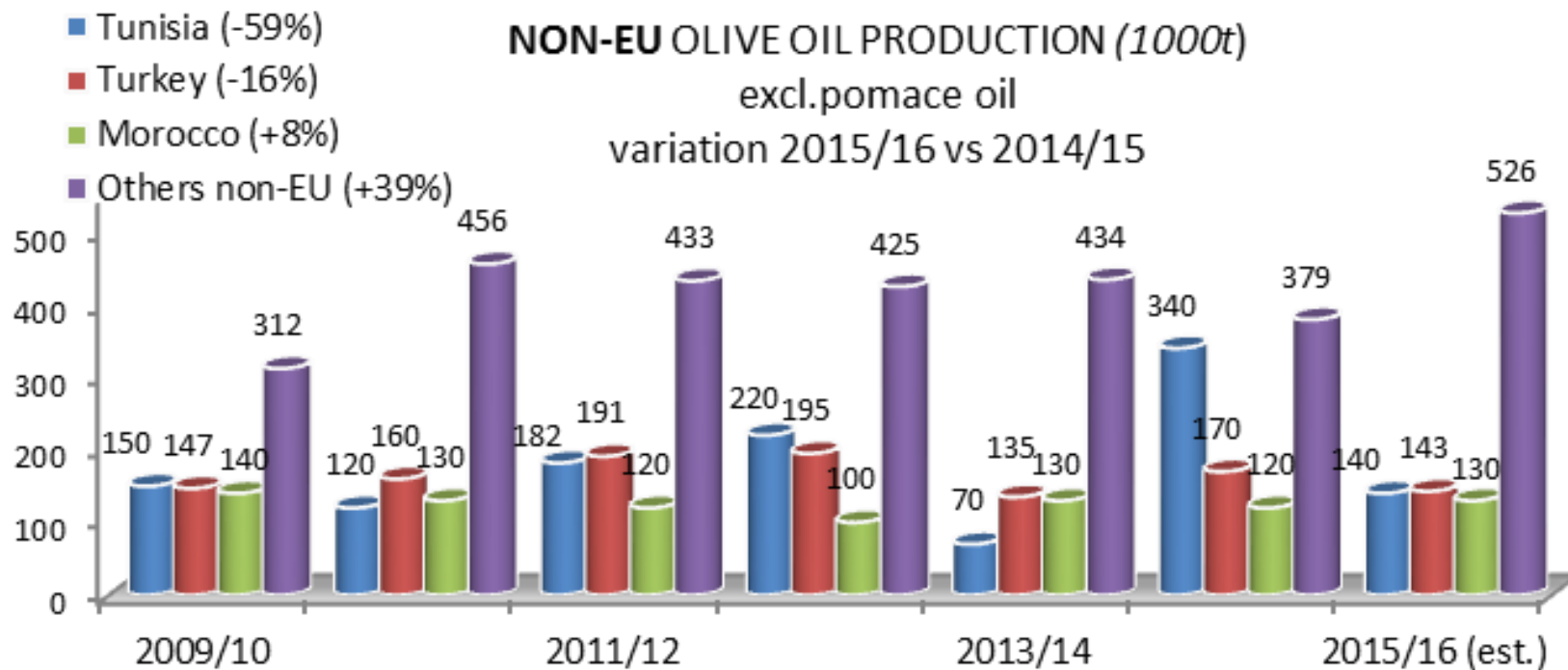
(\*)Commission Regulation (EC) 826/2008 and Commission implementing regulation (EU) No 65/2013 amending Annex III to Regulation (EC) No 826/2008

°) estimation/IOC

ES, EL, PT, IT, SL, MT - communications received 15.5.2016

HR, FR - communications received 15.4.2016

CY - communication received 15.11.2015



Source: IOC  
Data to be revised by the IOC in June 2016  
excl. pomace oil

# **EU OLIVE OIL EXTRA-TRADE**

## EU imports of olive oil (t)

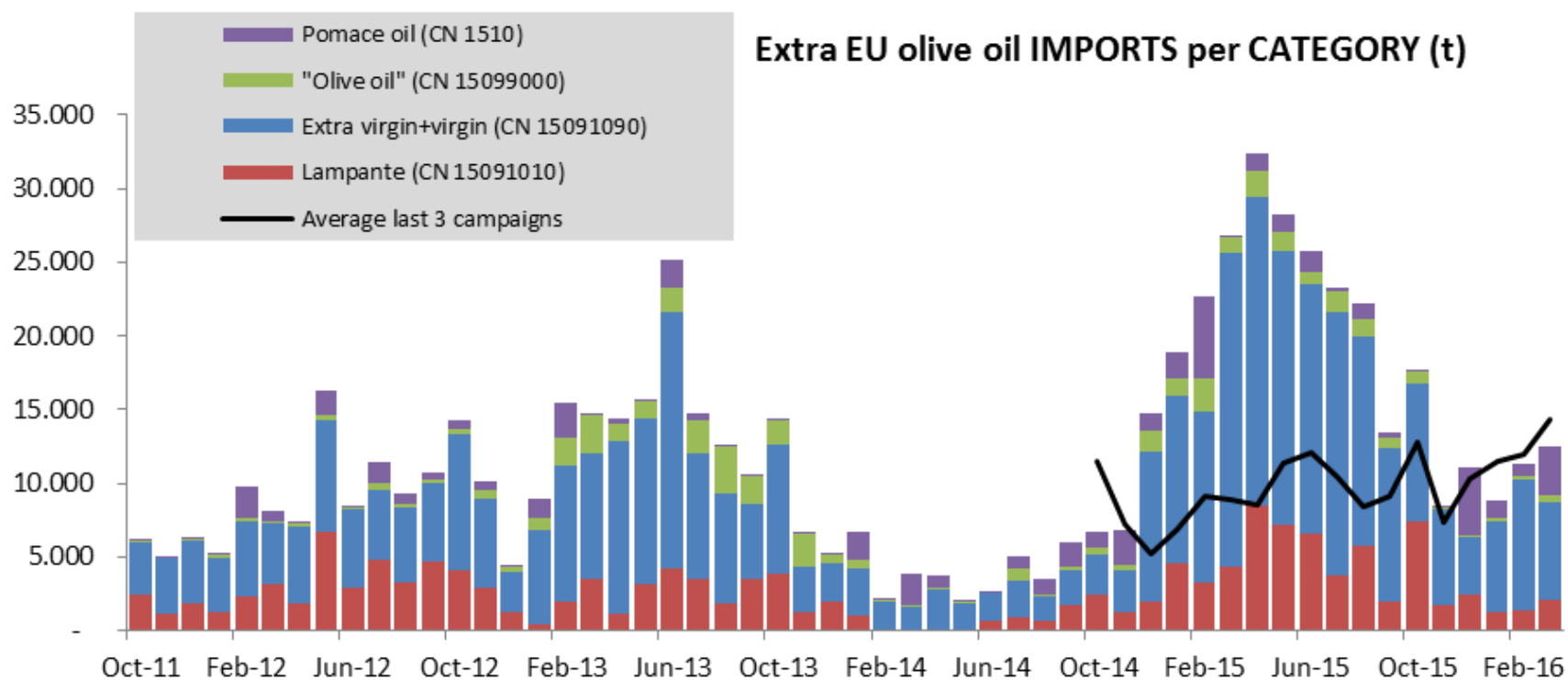
Trade figures (Comext®)

ORIGIN	2010/11		2011/12		2012/13		2013/14		2014/15		Oct 2015 - Mar 2016		% change Oct/15-Mar/16 vs Oct/14-Mar/15
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Tunisia	63.898	76%	92.353	89%	114.549	71%	36.695	60%	203.976	84%	47.957	69%	-38%
Morocco	13.388	16%	3.082	3%	11.779	7%	8.364	14%	26.360	11%	7.287	10%	-50%
Turkey	357	0%	926	1%	24.896	15%	6.665	11%	1.043	0%	335	0%	-49%
Argentina	132	0%	1.174	1%	2.081	1%	2.423	4%	2.457	1%	6.864	10%	1390%
Others	5.774	7%	6.482	6%	7.481	5%	7.471	12%	7.986	3%	7.259	10%	88%
<b>EXTRA EU</b>	<b>83.549</b>		<b>104.015</b>		<b>160.786</b>		<b>61.618</b>		<b>241.821</b>		<b>69.703</b>		<b>-28%</b>
% change			24%		55%		-62%		292%				

CN codes 1509 & 1510, all stat. regimes

Periods October - September

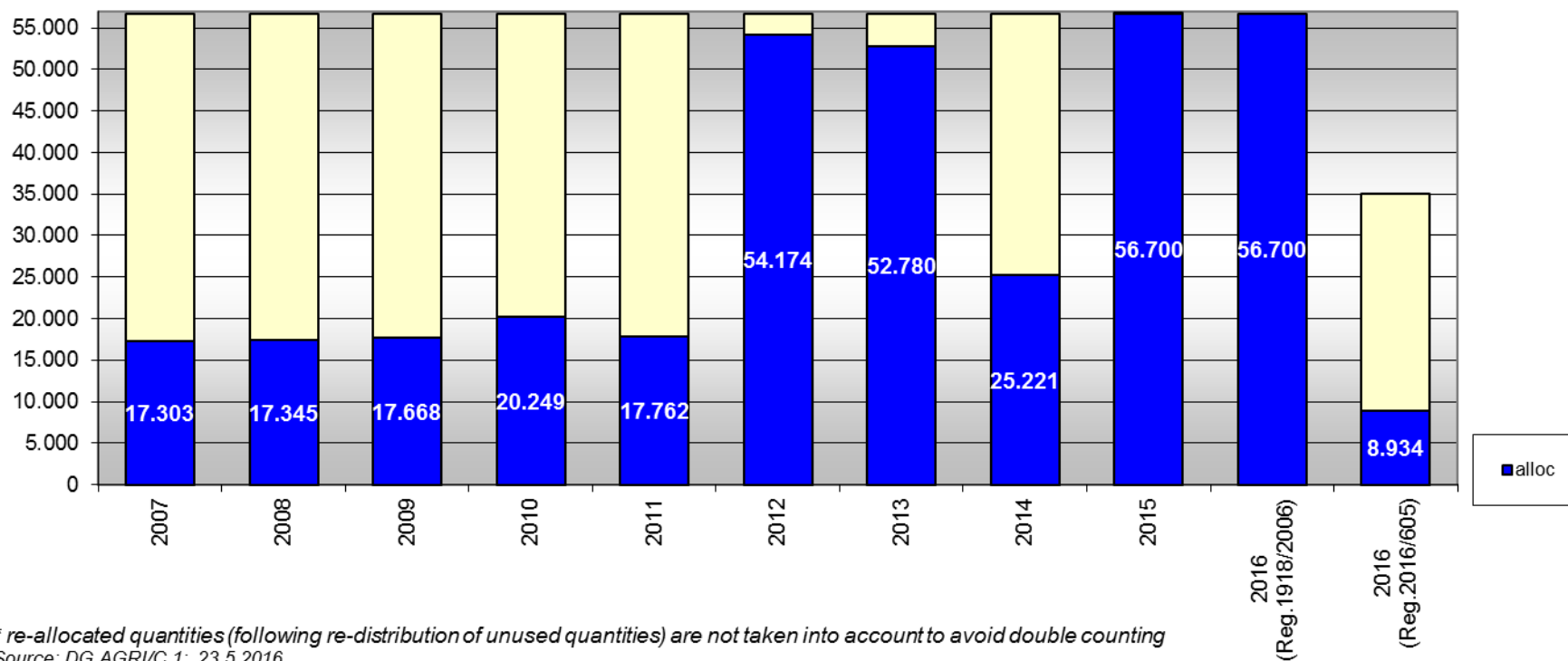




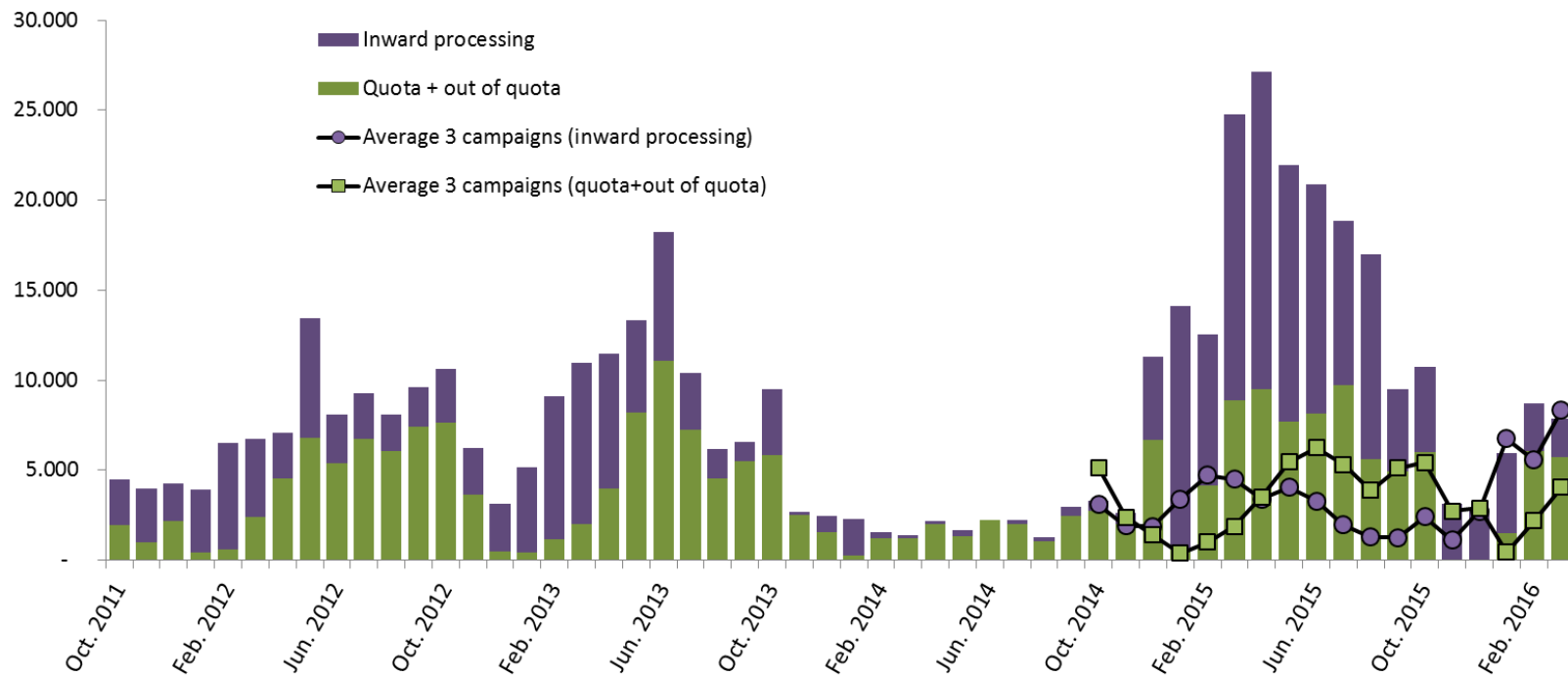
Source: Eurostat/Comext©; all stat.regimes

### TUNISIA - OLIVE OIL ZERO DUTY IMPORT QUOTA

Quota use: allocated part\* of total available quantities (t)



## IMPORTS of olive oil from TUNISIA (t)



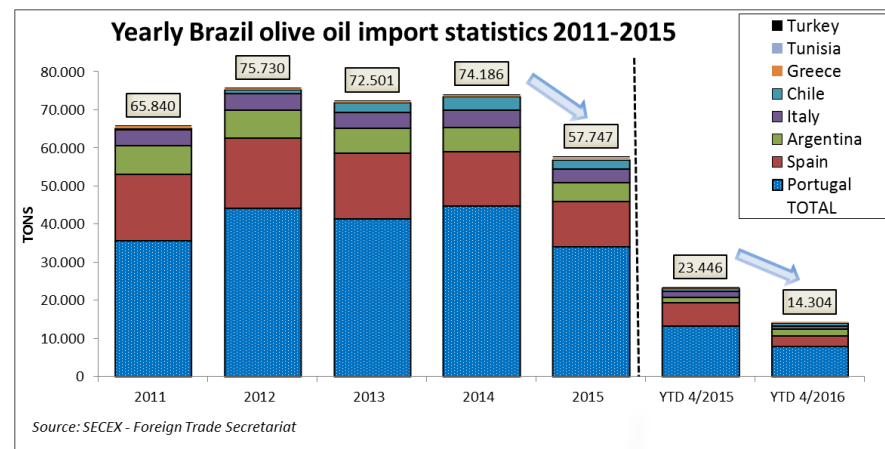
Source: Eurostat/Comext®; CN codes 15091010 & 15091090

## EU exports of olive oil (t)

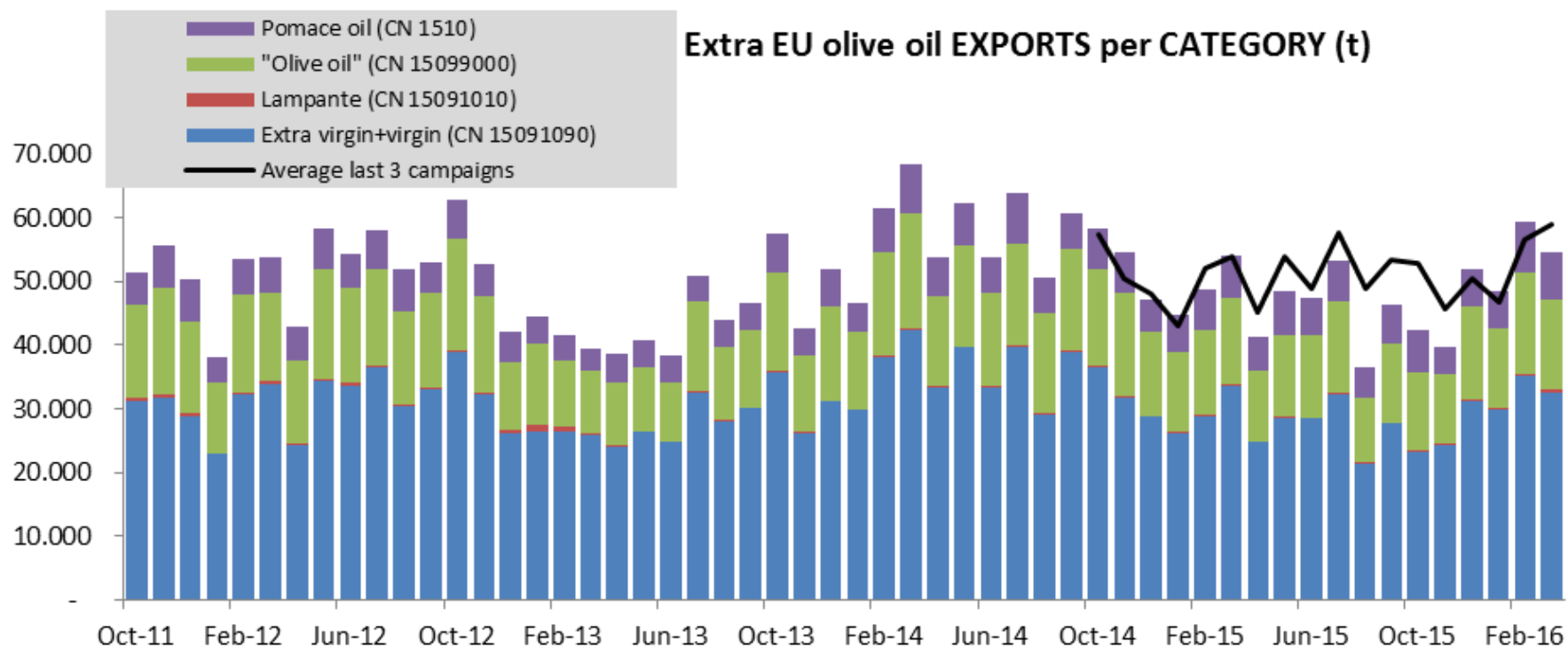
### Trade figures (Comext®)

DESTINATION	2010/11		2011/12		2012/13		2013/14		2014/15		Oct 2015 - Mar 2016	% change Oct/15-Mar/16 vs Oct/14-Mar/15
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%
United States	193.532	36%	228.457	37%	176.091	32%	246.987	37%	201.625	35%	113.512	6%
Brazil	56.876	10%	64.239	10%	64.981	12%	62.693	9%	56.051	10%	17.009	-47%
Japan	36.262	7%	44.873	7%	45.895	8%	53.601	8%	52.330	9%	25.000	-9%
China	31.612	6%	42.238	7%	36.834	7%	32.490	5%	32.976	6%	19.219	36%
Canada	30.166	6%	29.343	5%	24.369	4%	31.654	5%	24.751	4%	13.501	3%
Australia	28.794	5%	31.466	5%	23.791	4%	27.831	4%	18.878	3%	11.894	16%
Russian Federation	17.267	3%	20.406	3%	20.188	4%	23.256	3%	15.032	3%	7.998	-9%
Others	147.330	27%	160.470	26%	150.166	28%	194.828	29%	178.838	31%	88.552	-5%
<b>EXTRA EU</b>	<b>541.839</b>		<b>621.492</b>		<b>542.316</b>		<b>673.338</b>		<b>580.480</b>		<b>296.686</b>	<b>-3%</b>
% change			15%		-13%		24%		-14%			

CN codes 1509 & 1510, all stat. regimes  
Periods October - September



## Extra EU olive oil EXPORTS per CATEGORY (t)



Source: Eurostat/Comext©; all stat.regimes

# OLIVE OIL INTRA-TRADE

## Olive oil intra trade 2015/16\*

(thousands tons)

<b>Origin</b> (declared EXPORTS)	<b>Spain</b>		<b>Italy</b>		<b>Greece</b>		<b>Portugal</b>		<b>France</b>		<b>Others</b>		<b>TOTAL</b>
<b>Destination</b>	volume	% share on total	volume	% share on total	volume	% share on total	volume	% share on total	volume	% share on total	volume	% share on total	total 1509
Spain			5	12,5%	2	3,3%	34	72,1%	0	12,4%	0	0,4%	<b>42</b>
Italy	100	51,3%			62	84,1%	11	22,7%	0	2,9%	0	1,4%	<b>173</b>
Greece	0	0,1%	2	4,9%			0	0,0%	0	0,0%	0	0,4%	<b>2</b>
Portugal	26	13,6%	0	0,0%	0	0,0%			0	0,1%	0	0,1%	<b>26</b>
France	29	15,1%	9	21,3%	0	0,6%	1	1,8%			1	15,2%	<b>41</b>
UK	16	8,3%	3	7,8%	1	0,9%	0	0,1%	0	3,3%	0	2,5%	<b>20</b>
Germany	4	2,1%	13	30,2%	3	4,4%	0	0,6%	1	37,0%	0	8,3%	<b>22</b>
Netherlands	6	3,1%	1	1,9%	0	0,3%	0	0,4%	0	3,2%	1	14,7%	<b>8</b>
Others	12	6,4%	9	21,4%	5	6,5%	1	2,2%	1	41,2%	3	57,0%	<b>31</b>
<b>TOTAL</b>	<b>194</b>	<b>100%</b>	<b>43</b>	<b>100%</b>	<b>74</b>	<b>100%</b>	<b>47</b>	<b>100%</b>	<b>2</b>	<b>100%</b>	<b>5</b>	<b>100%</b>	<b>366</b>
<b>Total same period previous campaign</b>	<b>289</b>		<b>54</b>		<b>73</b>		<b>39</b>		<b>2</b>		<b>6</b>		<b>464</b>
<b>Difference same period previous campaign</b>	<b>-33%</b>		<b>-21%</b>		<b>1%</b>		<b>21%</b>		<b>1%</b>		<b>-22%</b>		<b>-21%</b>

\* From 1/10/2015 until 29/02/2016

Excl olive pomace oil

Source: Comext/Eurostat

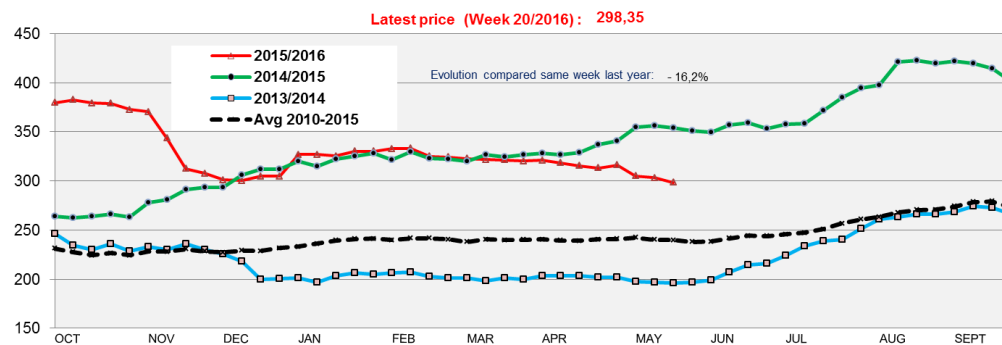
All stat. regimes

# EU OLIVE OIL PRICES

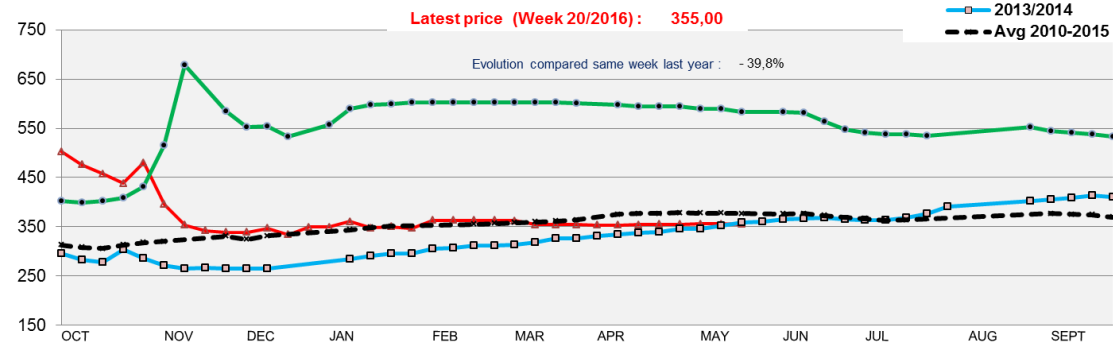




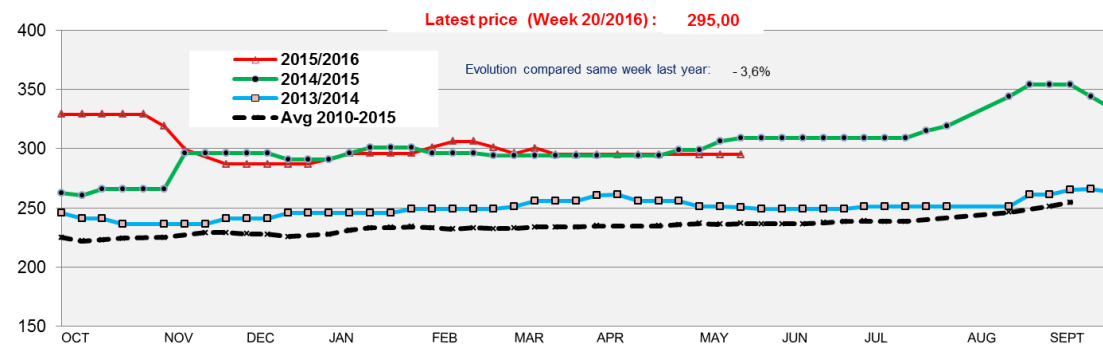
### Evolution of EXTRA VIRGIN olive oil price - SPAIN (Jaén) €/ 100kg



### Evolution of EXTRA VIRGIN olive oil price - ITALY (Bari) €/ 100kg

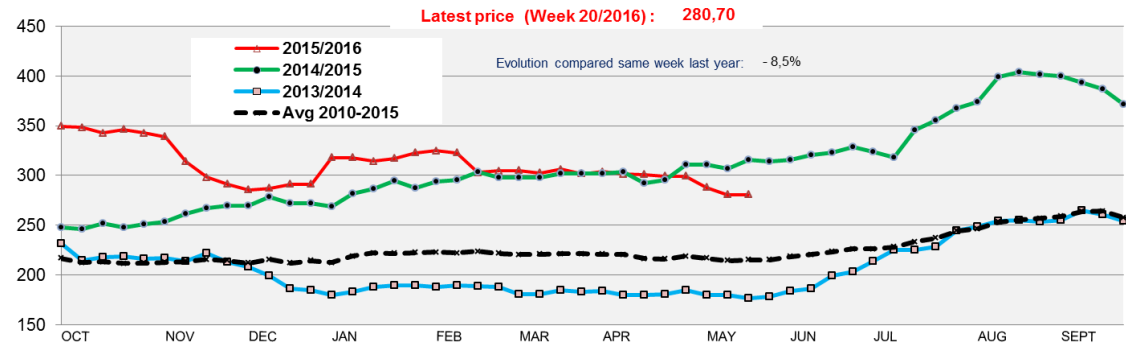


### Evolution of EXTRA VIRGIN olive oil price - GREECE (Xaviá) €/ 100kg

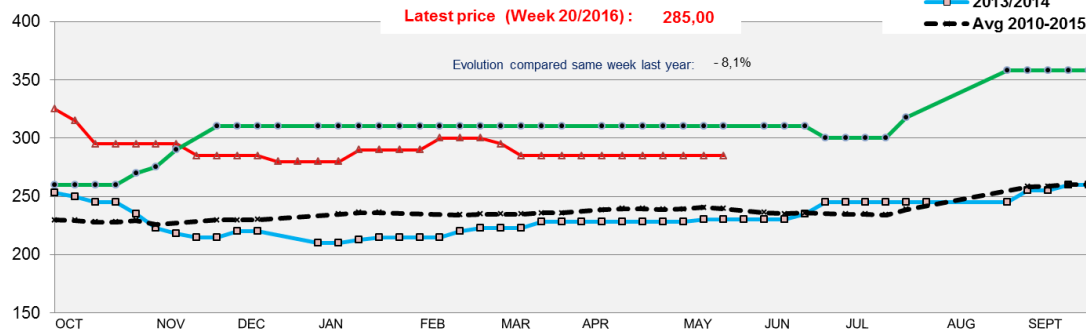




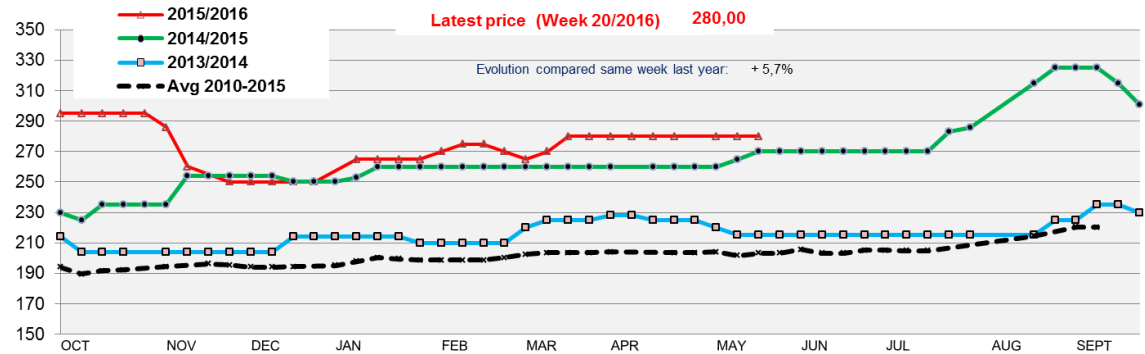
### Evolution of VIRGIN olive oil price - SPAIN (Jaén) €/ 100kg



### Evolution of VIRGIN olive oil price - ITALY (Bari) €/ 100kg

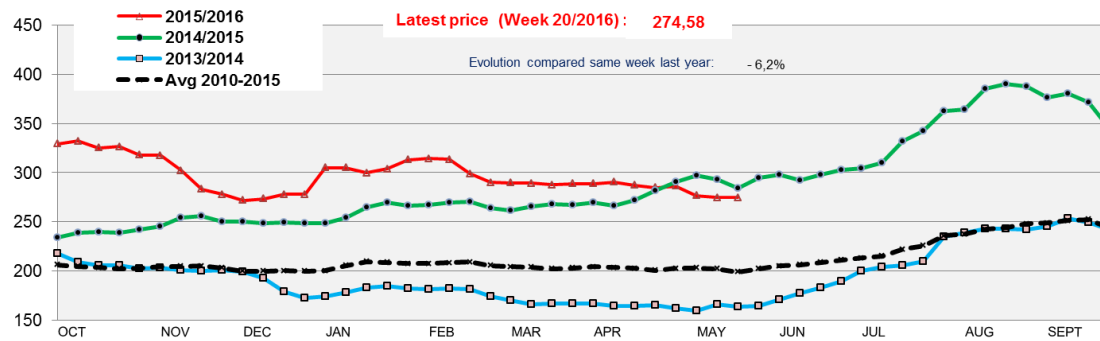


### Evolution of VIRGIN olive oil price - GREECE (Xaniá) €/ 100kg

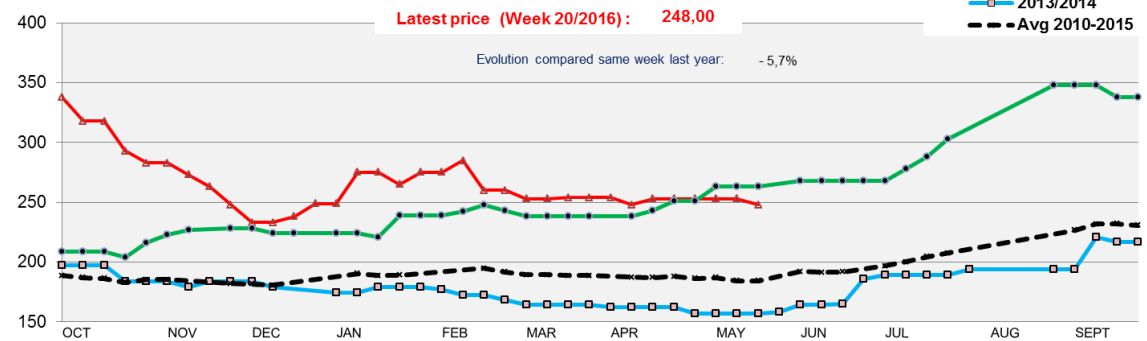




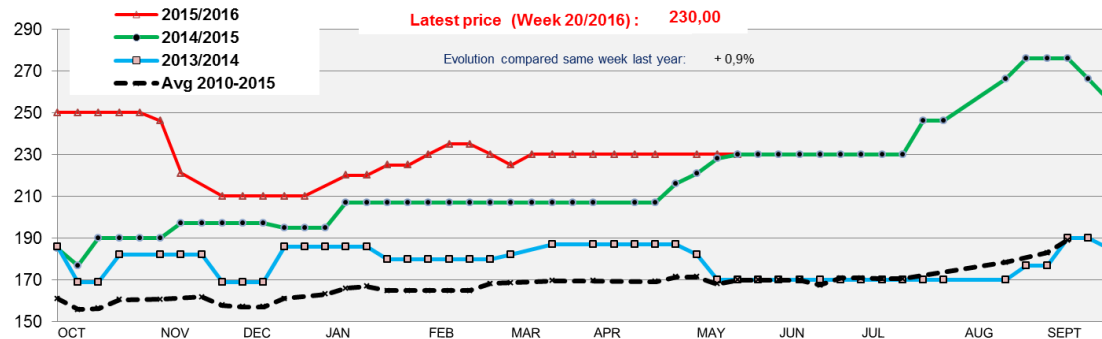
### Evolution of LAMPANTE olive oil price - SPAIN (Jaén) €/ 100kg



### Evolution of LAMPANTE olive oil price - ITALY (Lecce) €/ 100kg



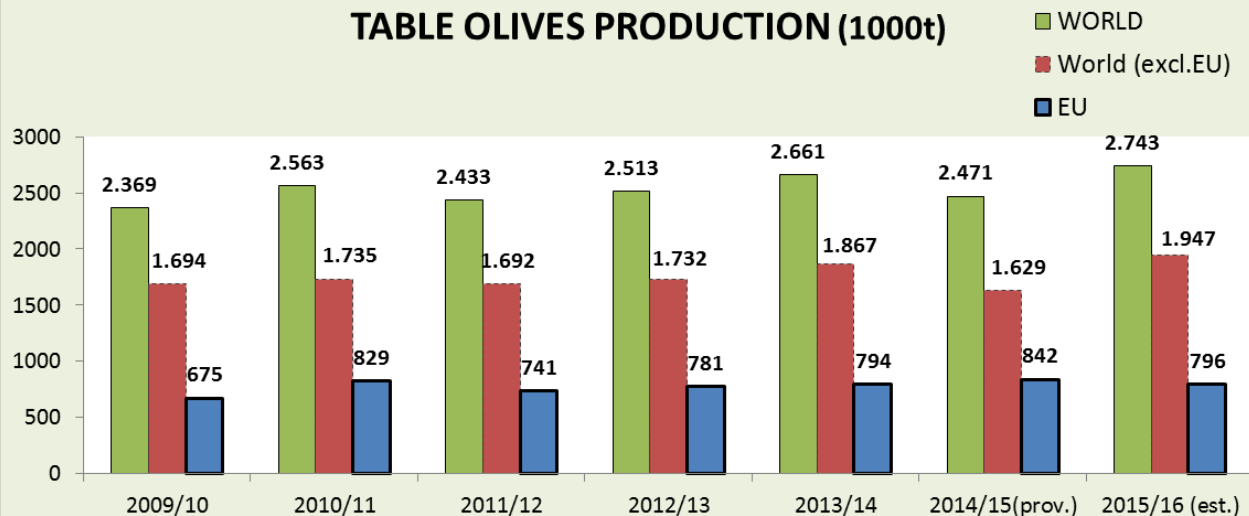
### Evolution of LAMPANTE olive oil price - GREECE (Xaniá) €/ 100kg



Source: MS declarations (R826/2008)

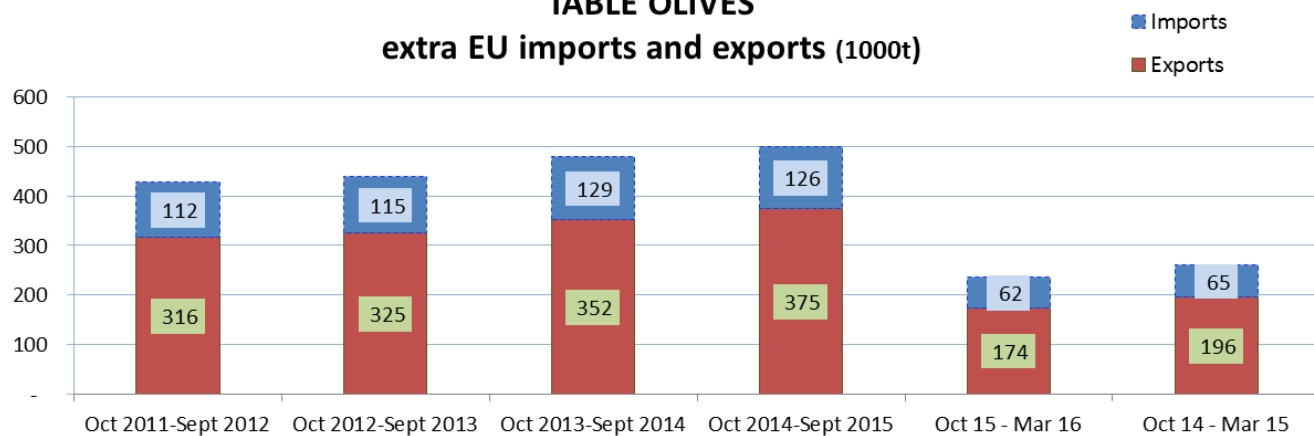
# TABLE OLIVES

## TABLE OLIVES PRODUCTION (1000t)

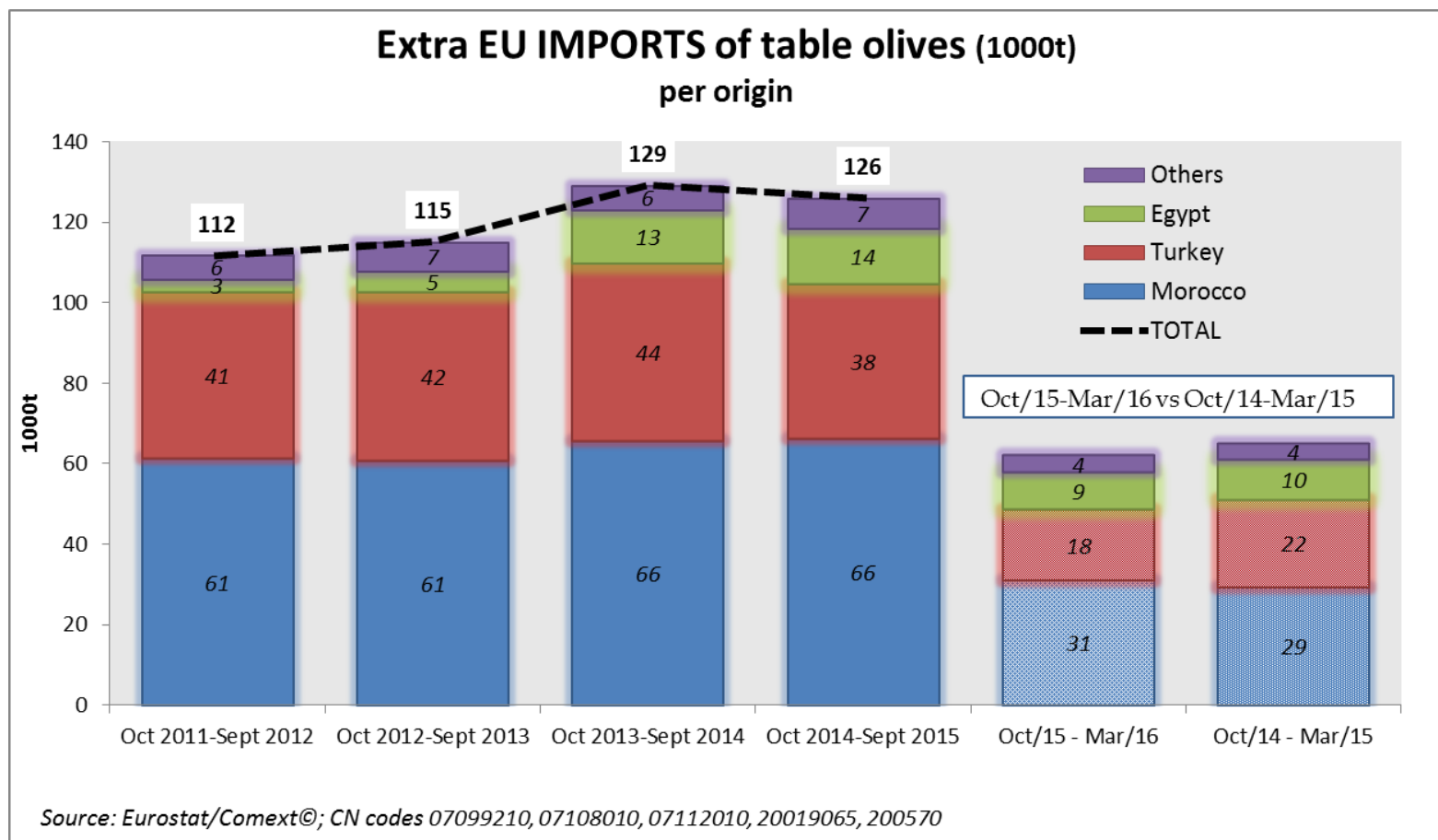


Source: MS declarations in the framework of IOC balance sheets, situation November 2015

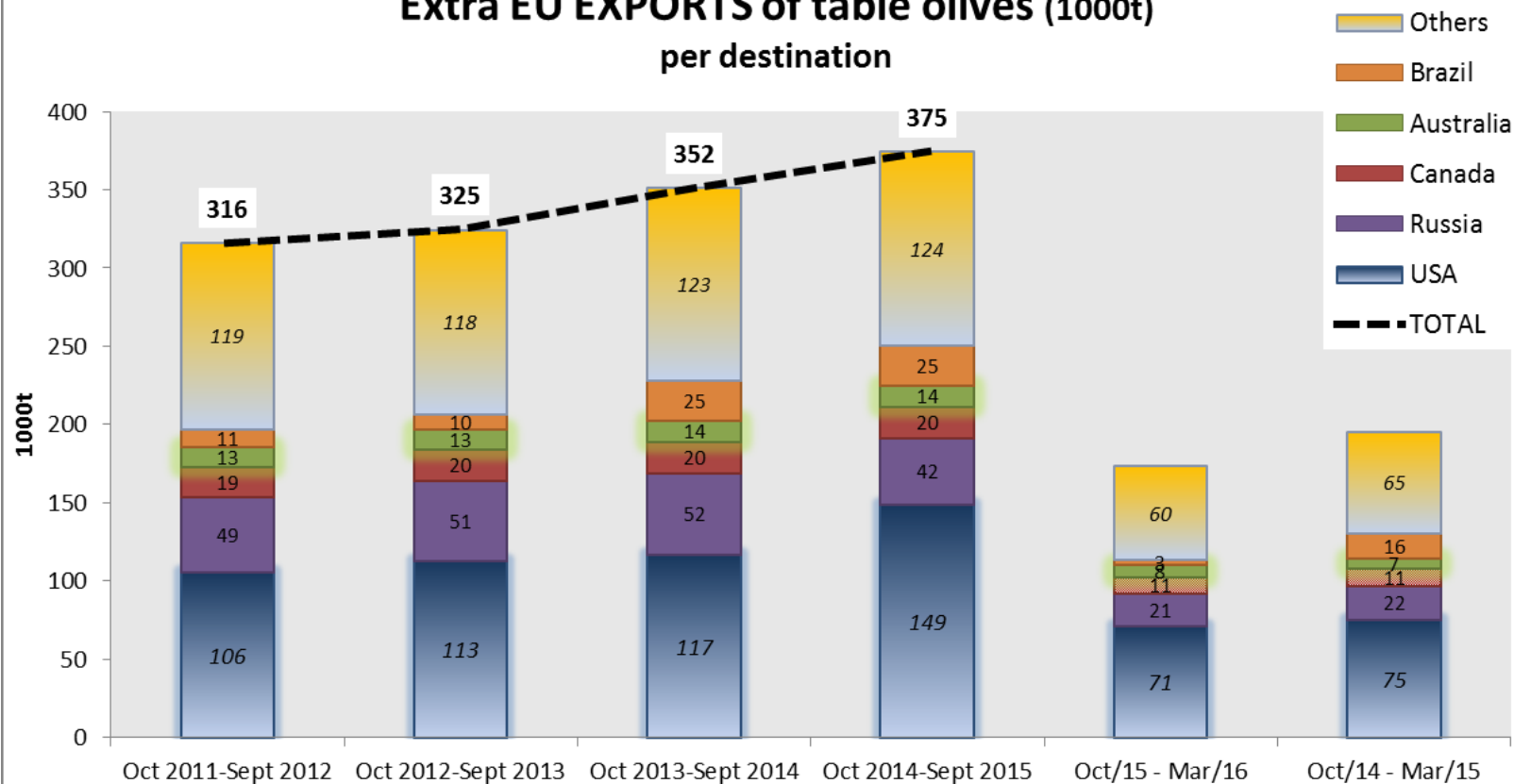
## TABLE OLIVES extra EU imports and exports (1000t)



Source: Eurostat/Comext©



## Extra EU EXPORTS of table olives (1000t) per destination



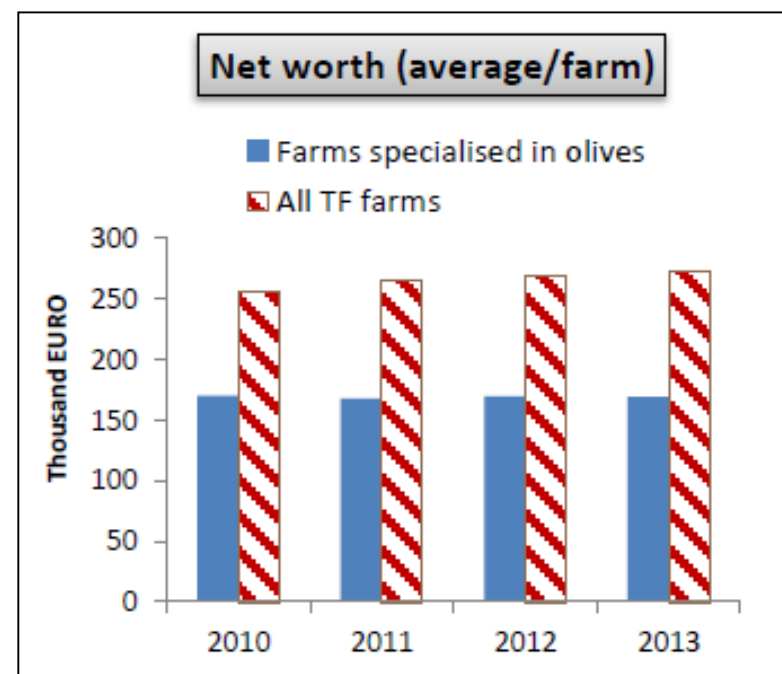
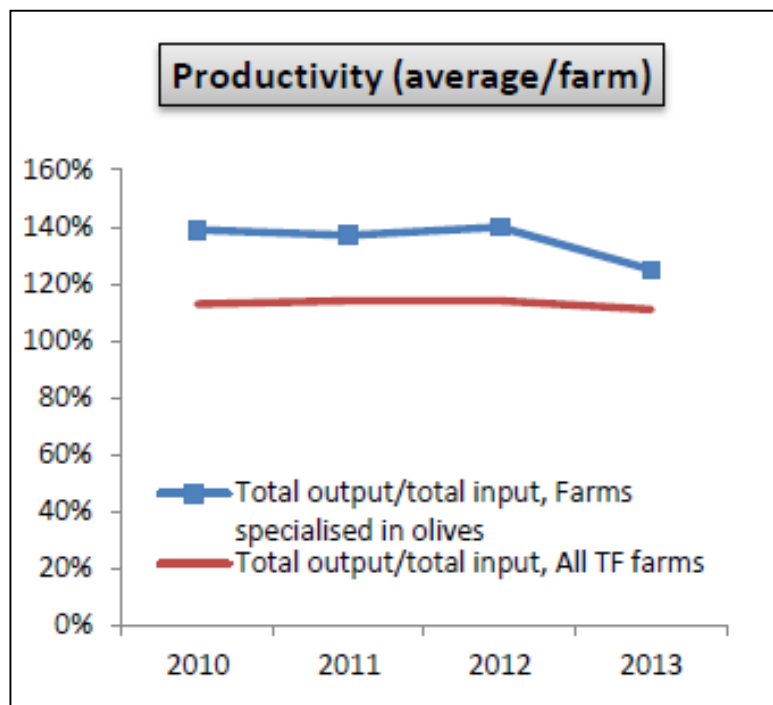
Source: Eurostat/Comext©; CN codes 07099210, 07108010, 07112010, 20019065, 200570

# **FADN (Farm Accountancy Data Network) FACTSHEET**



## FARMS SPECIALISED IN OLIVES IN THE EU

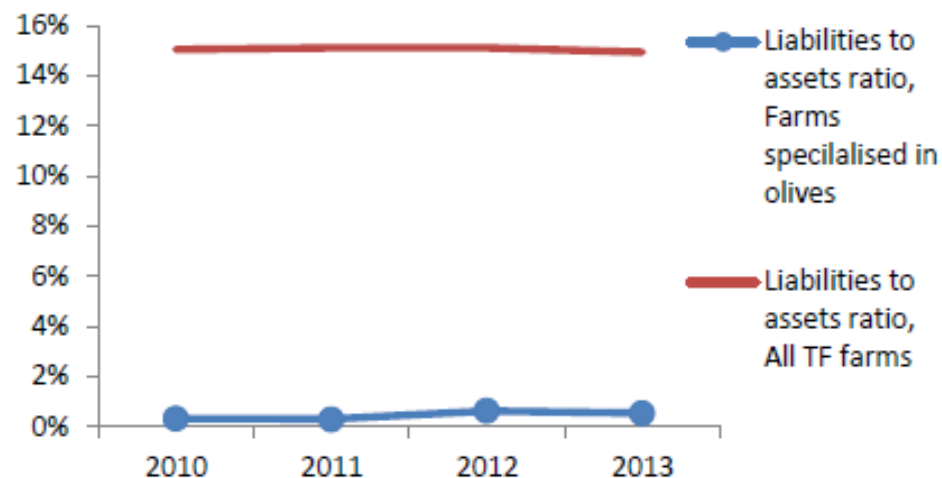
*Based on FADN data up to 2013*



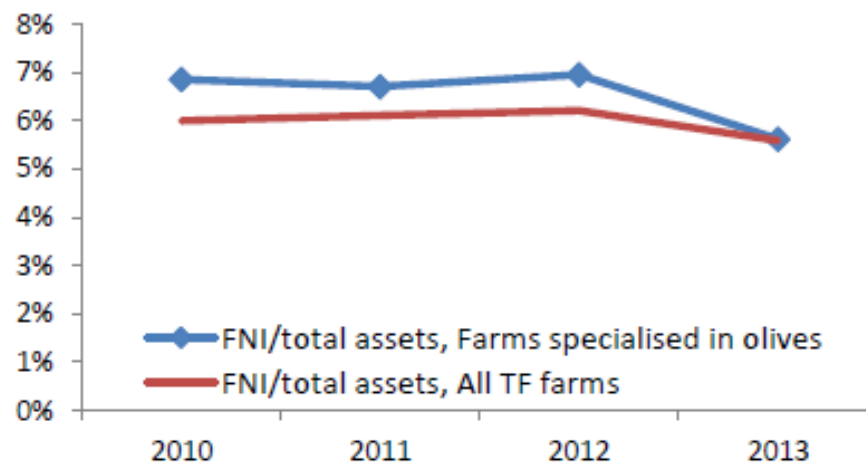


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### Liabilities to assets (average/farm)



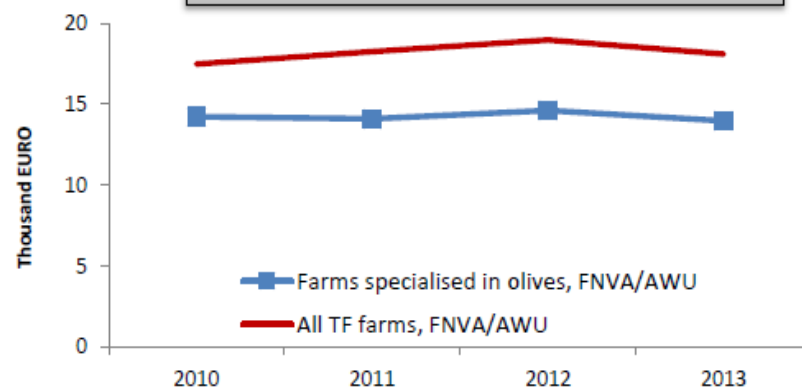
### Return on assets (average/farm)



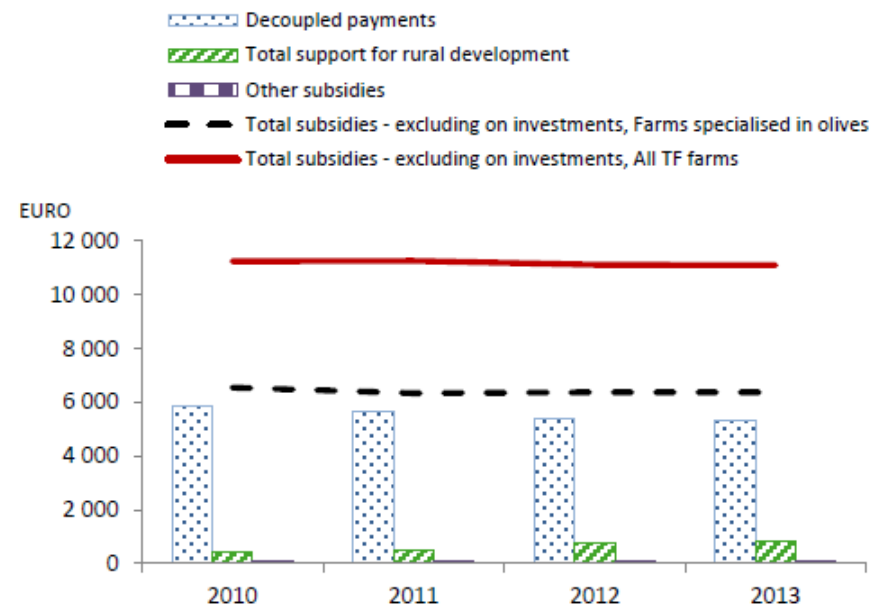


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Income by person, FNVA/AWU (average/farm)



Subsidies (average/farm)



*FADN database:*

[http://ec.europa.eu/agriculture/rica/database/database\\_en.cfm](http://ec.europa.eu/agriculture/rica/database/database_en.cfm)

*More market information on olive oil:*

[http://ec.europa.eu/agriculture/olive-oil/index\\_en.htm](http://ec.europa.eu/agriculture/olive-oil/index_en.htm)

*Thank you*