

AFRIQUE DU SUD

E.108/Doc. n° 4

Mise à jour n° 31

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INDICATEURS MACROÉCONOMIQUES ET AGRICOLES ¹

	UNITÉ	2000	2005
POPULATION			
Population Totale	Millions	45,61	47,43
Population rurale	Millions	20,30	19,98
Pourcentage rurale / totale	%	44,50	42,10
Population Active Totale (PAT)	Millions		
Population Active Agricole (PAA)	Millions		
PAA / PAT	%		
PRODUCTION			
Produit par Habitant (PIB/Hbt)	\$		4 960
Produit Intérieur Brut Agricole (PIBA) / Produit Intérieur Brut (PIB)	%		
FACTEURS DE PRODUCTION			
Surfaces Cultivées	1000 Ha		
Surfaces Irriguées	1000 Ha		
Surfaces Cultivées / Tracteur	Hectares		
ÉCHANGES AGRICOLES			
Importations Agricoles	Millions \$		
Exportations Agricoles	Millions \$		
Exp. Agricoles / Exp. Totales	%		
Imp. Agricoles / Imp. Totales	%		

¹ Source :U.N. Population statistics 2006.

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OLIVE GROWING IN SOUTH AFRICA

1. Introduction

The olive tree cultivation is a new one for South Africa. In this country the main use of olive fruits is for table olives production. As it concerns olive oil, one advantage South African producers have is latitude. They press their oils in the European off-season, when oil is scarce and northern demand for "fresh-from-the-mill flavour" is high. They have competition from Chile and Australia, which are also producing Olive fruits in the same period. Harvest date depends on the cultivar and the purpose for which the fruit is intended and normally stretches from February to July in the Western Cape.

2. History

Olives originated in the Eastern Mediterranean region and have come a long way with civilised man. However, olives were only cultivated commercially in South Africa from the beginning of the twentieth century. The local industry is based in the Western Cape, with the Paarl Valley as the centre.

Olives have been grown at the Cape since the days of Jan van Riebeeck. However, the real start of olive growing as a commercial enterprise in South Africa was made in 1903 when an Italian nurseryman, Ferdinando Costa, arrived in Cape Town observed the indigenous wild olives growing on the slopes of Table Mountain and saw the potential for an olive industry in the region. After importing cultivars from Italy, he began propagating trees by grafting them onto seedling rootstocks of the indigenous wild olive (*Olea e. africana*). He later purchased a farm in Paarl, about 60 kilometers east of Cape Town, where he concentrated on olive growing as his main activity. In 1935 he set up an oil mill on his farm and encouraged other to plant olives.

However, many growers regarded olives only as a sideline and yields were generally low because of the false impression that the olive prefers poor soils, very little water and almost no attention

The local olive industry thus grew slowly at first but this tempo accelerated later.

Current SA Olive Industry situation

More recently, new developments have taken place in the drier summer rainfall areas where irrigation is available. During the 1970's the production and profitability of table olives (i.e. fruit processed for eating) surpassed that of olive oil in South Africa and this is currently still the situation.

South Africa's Western Cape Province, slowly, started making inroads into the global market for olive oil, some 35 years ago. The Cape wine lands are home to a growing number of boutique oil-makers, who say their product can compare with the best oils that Spain, Italy and Greece can offer.

The Western Cape is currently the most important region especially the area (around 33° latitude) between Wellington and Stellenbosch on the foothills of the Cape Folded Ranges, with the main centre at Paarl. This area having a Mediterranean climate with hot dry summers and mild to cold wet winters contains about 90 percent of the estimated 450 000 bearing olive trees in South Africa, representing over 120 olive producers.

Many growers have small olive orchards of between 5 and 10 ha, often in combination with other crops such vines or fruit in the Western Cape, or with cash crops such maize, in the Northern Cape. Some part time farmers own smallholdings, usually with less than 5 ha under olives, while a handful of growers concentrate on olives as their main income. Of these, currently only three have over 100 ha of olives, each with its own processing facilities

According to the SA Olive Industry Association, South Africa's total olive oil production was 490 tons in 2004, compared with total world output of about three million tons. The yearly table olives production is about 4.000 tonnes and the importations are 550 tonnes for olive oil and 400 tonnes for table olives.

Of the current total production estimated around 4 000 tons in South Africa, more than 60% is pickled while the rest is used for oil. The proportion of the local crop that is pickled has increased rapidly since the 1970's. The lack of accurate census figures on olive production is best explained by strong alternate bearing tendency of the olive, irregular crops and the fact that the local olive industry has never had a formal marketing control organisation as was the case with most other agricultural products.

Both table olives and olive oil production is currently geared to local consumption which is estimated at around 4 000 tons and 800 tons respectively per annum at present. The market is, however, showing a steady growth in both table olives and olive oil. About 10% of the average of the local consumption of table olives and 70% of olive oil is still being imported annually.

3. Key production patterns

Varieties

The main considerations that have to be taken in account for the varieties choice for olive tree plantations are the same through out the World. In South Africa, due to the lack of tradition in olive tree cultivation, considerable attention must be done in that field. So, which varieties (or more correctly cultivars) to plant are determined by the following:

1. the market demand for the specific product (for example olive oil or table olives), the type of processed products required (e.g. black or green table olives), and the suitability of the cultivar to these specific products;

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2. the adaptability of the cultivar to a specific region, especially regarding production, resistance to pests diseases and possible frost;
3. the cross pollination requirements of the cultivars;
4. the ripening period and harvest season of the cultivars relative to other cultivars, other fruit kinds (where relevant) and other management practices;
5. The availability of planting material.

The following range of cultivars have been shown by trial results as well as experience by the industry to be the best currently available for South Africa.

Mission, the most popularly planted at the moment in South Africa and is widely adaptable. It is especially suited to black table olive production as well as for olive oil.

Kalamata, ideal as a black table olive, with lower oil content than Mission. The tree is less adaptable than Mission and is difficult to propagate.

Manzanilla, is especially suited to green table olive production, has low oil content and softens on ripening.

Barouni, only suited to green “Queen” table olive production because of its large fruit size and low oil content.

Frantoio, suited to the production of high quality olive oil and as a cross pollinator for the other cultivars.

Planting distances will depend on circumstances, but traditionally trees are spaced 4 to 5 metres apart in the row and rows are spaced 6 to 7 metres apart. An alley width of two metres is sufficient for normal orchard traffic. If mechanical harvesting becomes an option, alley width has to accommodate the efficient operation of such machines. Under intensive management trees can be spaced closer and their height reduced accordingly.

pest and disease management

Olive pests are, to a large degree, kept in check by their natural enemies in the Western Cape. Olives thus lend themselves here to be grown and marketed as organic products. Growers should be careful not to disturb this balance by injudicious pesticide use, and should in addition use other practices which can reduce pest infestation, such as correct pruning and minimising traffic dust.

The main pests which occur on olives in South Africa are:

1. The yellow and black striped olive beetle, with its bright yellow larvae which eats and tunnels into leaves especially on young trees, destroying new growth.
2. The olive lace bug or “tingid” which sucks out the sap of leaves, especially where growth is dense, and so causes tiny yellow dots on the leaves which later become completely chlorotic and die.

3. The olive fly, which stings the fruit and lays its eggs which then hatch and destroy the fruit as the larvae burrow through the flesh.

Under dusty conditions, infestation by various scale insects can be damaging. Insects such as psylla only become serious pests when the ecological balance is disturbed through injudicious pesticide use. Effective control of most of these pests is available, but one should always strive to allow biological control to take place.

The main fungal diseases include:

1. anthracnose (“Gloeosporium”), which causes rapid fruit spoilage and cankers on shoots;
2. olive leaf spot (“peacock spot”) which causes sooty spots and yellowing of leaves, later resulting in leaf drop and death of shoots;
3. Various soil-borne root diseases (Phytophthora, Verticillium, Phoma, etc.) which occur as a result of poor irrigation scheduling (localised over-irrigation and excess free water at the tree stem).

These diseases are controlled by chemical agents and correct orchard management practices.

harvesting

Olive fruits for Table olives production are picked separately and carefully by hand and placed in picking bags or buckets, while oil olives are usually stripped off the trees onto nets placed on the ground. Harvest date depends on the cultivar and the purpose for which the fruit is intended and normally stretches from February to July in the Western Cape.

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PROFIL OLÉICOLE ¹

I. DONNÉES STATISTIQUES

A. Données statistiques relatives à la production d'huiles d'olive, d'olives de table et des autres huiles alimentaires

1. Superficie des plantations oléicoles et rendements

a. Évolution de la superficie oléicole (en ha):

Années	Superficies plantées dans l'année	Superficies Arranchées dans l'année	Superficie totale
2000	--		2 500
2001	--		2 500
2002	500		3 000
2003	300		3 300
2004 (estimation)	700		4 000
2005 (estimation)	200		4 200
2010 (estimation)			6 200

b. Superficie totale consacrée à l'oléiculture en l'an 2005 (en ha):

Culture	Superficie totale (non compris les plantations abandonnées)			Superficie en production		
	En sec	En irrigué	Total	En sec	En irrigué	Total
Olives de table	ND	ND	ND	ND	ND	ND
Olives à huile	--	--	ND	--	--	ND
Olives à double fin	--	--	ND	--	--	ND
Total	--	--	4 200	--	--	2 000

¹ Réponses au questionnaire du Secrétariat exécutif du COI.

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c. Densité moyenne de plantation (en nombre d'oliviers/ha) en 2003:

Type de culture	Oliviers à huile	Oliviers à fruits de table
En irrigué		
En sec	260	260

d. Distribution de la superficie oléicole, par tranches d'âge, en l'an 2005:

Âge	Superficie (ha)	%
Moins de 5 ans	2 000	48
Entre 5 et 15 ans	2 000	47
Entre 16 et 50 ans	200	5
Plus de 50 ans		
Total	4 200	100

B. Données statistiques relatives au commerce**• Commerce des huiles d'olive (en tonnes)**

Importations/Exportations	1999	2000	2001	2002	2003(8 m)
Importations d'huiles d'olives	1 047	1 614	1 742	1 791	1 607
Importations d'huiles de grignons d'olive	579	951	877	1 066	925
Exportations d'huile d'olive	--	--	--		
Exportations d'huiles de grignons d'olive	--	--	--		

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- **Importation par pays d'origine des huiles d'olive (en tonnes)**

Huile d'olive vierge extra										
Pays	Janv.	Fév.	Mars	Avril	Mai	Juin	Juill.	Août	Total	% HOVE
Espagne	32	104	81	99	80	16	11	43	466	29,00
Roy. Uni	5	3		10		5			23	1,46
Grèce	11		29	15	4		33	8	100	6,25
Italie	220	86	86	176	102	87	81	46	884	55,01
Portugal	8		2		14	4	23	6	56	3,49
Argentine					10			8	18	1,13
Turquie					26		30	1	56	3,51
Maroc							1		1	0,09
Autres	--	--	--		--			1	1	0,06
Total	276	193	198	301	236	112	179	112	1607	100,00
Huile d'olive										
Pays	Janv.	Fév.	Mars	Avril	Mai	Juin	Juill.	Août	Total	% HOVE
Espagne	104	73	41	27	37	25	28	2	337	36,36
Roy. Uni	5	3		6				--	14	1,47
Grèce	6		30	--	9			7	52	5,59
Italie	41	49	62	27	26	50	22	33	312	33,69
Portugal	42	20	23	2	25	26	10	12	160	17,24
Argentine	11				19		10		40	4,36
Turquie										0,00
Maroc							12		12	1,24
Autres	--	--	--	--	--	--	--	--	--	0,05
Total	210	144	156	617	116	101	82	54	925	100,00

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- **Commerce des autres huiles végétales fluides alimentaires
(en 1000 tonnes)**

Importations/Exportations	2001	2002	2003	2004	2005
Importations huiles de soja	85,7	132,0	127,5	175,3	220,2
Importations huiles de tournesol	107,1	4,1	41,3	93,2	36,2
Importations huiles de coton	38,8	46,1	7,8	1,0	6,7
Importation autres huiles	--	0,1	1,9	0,1	0,2
Total des importations H.V.F.A.	231,6	182,3	178,5	269,6	263,3
Exportations huiles de soja	10,6	5,9	2,1	1,5	3,7
Exportations huiles de tournesol	18,2	17,9	9,9	10,3	16,4
Exportations huiles de coton	0,1	0,2	1,4	1,1	0,7
Exportations autres huiles	5,5	7,6	4,1	1,7	5,4
Total des Exportations H.V.F.A.	34,4	31,6	17,5	14,6	26,2