



Presentation to the International Olive Council Seminar

Presentation of the findings of the
IOC commissioned study on existing
and potential GIs

David Thual – Fanny Lossy
21 October 2010 – Villa San Giovanni

Objectives of the study

1. Identification of the protected products and their specifications
 - Comparative analysis of the currently protected table olives and olive oils GIs: definition of the main differences and similarities of these GIs

2. Identification of potential GIs in the olive oil and table olives' sector



Findings on protected table olives and olive oils' geographical indications



The detailed analysis of the protected table olives and olive oils' geographical indications

1. Creation of an “identity card” for each product (name of the GI, type of GI, name of the right holder and types of control of the specifications)
 - Result:
 - A list of table olives and olive oils protected as GIs in the IOC members, including a short description of the specifications
 - The creation of an “identity card” for each table olive and olive oil with GI

The detailed analysis of the protected table olives and olive oils' geographical indications



2. A detailed comparative analysis of the GI specifications
 - Results :
 - Creation of the database on the table olives and olive oils specifications (type of protection, origin of the raw material and the production area, characteristics, cultivation techniques...)
 - Emphasis on the main characteristics of the GIs
 - In-depth analysis of the table olives and olive oils specifications
 - Overview of profiles of the GI products in the olive sector

General Overview

	Table Olives	Olive Oils
	EU Countries	
France	4	7
Greece	10	27
Italy	3	40
Portugal	2	6
Slovenia	/	1
Spain	/	20
Sub Total EU Countries	19	101
	Non-EU Countries	
Morocco	/	1
Turkey	1	3
Sub Total Non-EU Countries	1	4
Total EU and Non-EU	21	105

Summary

- European Union:
 - 19 table olives and
 - 101 olive oils

- Morocco
 - 1 olive oil

- Turkey
 - 1 table olive and
 - 3 olive oils

Summary

- Comparison made:
 - For table olives
 - Between the EU countries
 - Between the non EU countries
 - Between the EU countries & the EU countries

 - For olive oils
 - Between the EU countries
 - Between the non EU countries
 - Between the EU countries & the EU countries

Summary for olive oils

Elements included in the specifications	Total EU	Total Morocco	Total Turkey
PDO	92.79%	100%	100%
Local raw materials	100%	100%	100%
Variety of the olive is <u>not</u> native	83.02 %	100%	100%
Physical characteristics	93.57%	100%	100%
Chemical characteristics	94.38%	100%	100%
Organoleptic characteristics	96.05%	100%	100%
Cultivation methods	58.73%	60%	0%
Production methods	94.72%	100%	100%
Packaging methods	76.33%	100%	33.33%
Rules concerning the labelling	97.22%	100%	100%

Summary for table olives

Elements included in the specifications	Total EU	Total Turkey
PDO	97.50%	100%
Local raw materials	97.50%	100%
Variety of the olive is <u>not</u> native	87.50%	100%
Physical characteristics	91.67%	100%
Chemical characteristics	29.17%	100%
Organoleptic characteristics	56.67%	100%
Cultivation methods	69.91%	20%
Production methods	100%	100%
Packaging methods	75%	100%
Rules concerning the labelling	100%	100%

Summary

- Common elements to the majority of protected olive oils and table olives studied in this phase :
 - mostly PDOs,
 - the raw materials come from the area,
 - the variety of the olive is not native,
 - the physical, chemical and organoleptic characteristics of the olives are given in the specifications.
 - the cultivation, production and packaging methods as well as the rules concerning the labelling are indicated.

- The Moroccan system is inspired by the EU system

Summary

- Main differences between the specifications within the European Union & between EU and non EU products:
 - the type of control
 - how detailed the texts are.

- Main difference between EU and Turkish specifications:
 - The Turkish one does not include detailed information on olive cultivation for instance
 - It concentrates on:
 - Description of the final products and production methods.
 - Protected GIs cover very large areas with heterogeneous olive varieties, flavours and cultivation techniques.



Findings on GI potential in olive producing countries



The identification of the GI potential in olive producing countries

1. List of olive oils or table olives which are not protected yet at the national level but which are enjoying sufficient recognition to justify a registration in the near future.
 2. Evaluation of the interest of stakeholders in the registration of their products.
- Results :
- Database of potential table olives and olive oils GIs
 - Analysis of the interest in the registration of table olives and olive oils as GIs in the covered countries.

Overview – IOC members

This chart only shows the IOC members which have potential GIs.

	Potential Olive oils GIs	Potential Table olives GIs
Albania	3	2
Argentina	4	9
Croatia	8	/
	European Union	
France	3	2
Greece	1	/
Italy	4	1
Portugal	2	2
Spain	9	1
Sub Total EU Countries	19	6
Israel	4	/
Jordan	2	/
Lebanon	6	/
Morocco	1 or 11	/
Syria	4	4
Tunisia	21	/
Turkey	3	3
Total	From 75 to 85	24

Overview of IOC members

- In the IOC members:
 - 75 to 85 olive oils, and
 - 24 table olives.

- The countries which have the higher number of potential GIs:
 - Tunisia: 21 potential olive oils GIs,
 - Morocco: 11 potential olive oils GIs,
 - Argentina: 9 potential table olives GIs.

- The Members States of the EU do not account for the majority of the products found:
 - Most GIs are probably already protected at the EU level.

Overview – non IOC members

	Potential Olive oils GIs	Potential Table olives GIs
Australia	/	/
Brazil	/	/
Chile	4	2
Mexico	/	/
Palestine	6/7	/
Peru	4	1
Saudi Arabia	/	/
USA	4	/
Total	From 18 to 19	3

Overview of non IOC members

- In the non IOC members:
 - 18 to 19 olive oils, and
 - 3 table olives.
- The countries which have the higher number of potential GIs:

	Potential Olive oils GIs	Potential Table olives GIs
Chile	4	2
Peru	4	1
Palestine	6/7	/
USA	2 big areas: 4 potential olive oils GIs	/

- This interest is motivated by the history of the olives trees in these countries:
 - In Palestine: the culture of the olives is traditional,
 - For the others: it has been introduced by European immigrants.

Conclusions

- In the IOC members:
 - 75 to 85 olive oils, and
 - 24 table olives.
- In the non IOC members:
 - 18 to 19 olive oils, and
 - 3 table olives.
- In total:
 - from 93 to 104 olive oils, and
 - 27 table olives.
- The majority of the potential GIs have been found in the IOC countries.

Conclusions

- Why there is an interest in the protection of local products:
 - Because these countries want to export to the EU which represents an important market and where GIs represent an important market segment.
 - Producers in these countries have expressed an interest for GI protection as a way to better protect and to better promote and sell their olive oil or table olive on their national markets and on the EU market.

Conclusions

- Why there is no potential GIs in some of the countries covered by the study:
 - There is no production of olives,
 - There is no legal framework to protect these products as GIs,
 - The production is recent and is not protected yet.
 - The reflection on the protection of GIs started recently and the process of protection is ongoing.



Thank you for your attention

David Thual

E-mail: d.thual@insight-consulting.eu

Tel: +32.2.733.50.60