



INTERNATIONAL OLIVE COUNCIL NEWSLETTER

Nº 154
OCTOBER 2020
ENGLISH





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ADVISORY COMMITTEE: 55TH MEETING ON 10 NOVEMBER 2020

MADRID/ The Advisory Committee meets again after nearly a year. The 55th meeting will take place from 10am to 5.30pm on 10 November 2020, just under two weeks before the 112th session of the Council of Members and the first since the outbreak of covid-19.

The committee usually meets twice a year. But in 2020, the spring meeting was cancelled due to the pandemic. The Committee will meet by videoconference, and the Executive Secretariat will connect from IOC headquarters in Madrid.



Among the topics of interest are: the signing and ratification of new accessions to the International Agreement on Olive Oil and Table Olives 2015; the results of the 110th and 111th sessions; information on the activities of the economic and promotion, chemical and standardisation, technical and environmental and observatory units.

The Committee will discuss the 2020/2021 crop year, renew its representatives for the 2020-2023 period and examine draft decisions for adoption by the Council of Members.

The meeting will include simultaneous interpretation into the five official languages of the IOC: Arabic, English, French, Italian and Spanish.

TOMORROW TASTES MEDITERRANEAN

MADRID/ Changing what we grow, cook, and eat is more imperative than ever if we want to save the planet from the effects of climate change. Thankfully, we need look no further than to the principles of health, sustainability, and flavour of the Mediterranean diet. Join the **Torribera Mediterranean Center**—a project of the Culinary Institute of America and the University of Barcelona—on 16 November 2020 for **Tomorrow Tastes Mediterranean**: Virtual Conference.

In roundtables and presentations, leading chefs and scientists from around the world will discuss health, nutrition, sustainability, and flavour strategies to help chefs and the hospitality industry adapt the Mediterranean Diet to create menus and products suited to the demands of 21st century consumers, in the era of COVID-19. There will be plenty of time to talk to the experts and ask questions during this free virtual programme.

Register here: <https://zoom.us/meeting/register/tJEkf-uvpz4oHtT9h7oVDMn5XSamlGJb0XDQ>.

Inspired by the United Nations Sustainable Development Goals and in recognition of the 10th anniversary of the designation by UNESCO of the Mediterranean diet as an Intangible Cultural Heritage, and at a time of



great uncertainty in our industry worldwide, how can scientists, chefs, business owners, government leaders, and hospitality staff work together to boost the visibility of the traditional Mediterranean diet—fruits and vegetables, whole grains, olive oil, legumes, nuts and seeds—on menus across the Mediterranean and worldwide?

And to that end, how can this collaboration inspire next-generation culinary strategy, food product innovation, and consumer engagement on the genius of the centuries-old food cultures of the Mediterranean basin?

For further information, click <https://www2.ciachef.edu/htmlmail/sig2020/wof/wof2020-ttm-101620.html>



THE OLIVEMED2 PROJECT

'The diversity of varieties, olive growing systems and markets in the face of climate change'

MADRID/ On October 2020, the OliveMed2 project was presented to LabEx Agro of Agropolis Montpellier by videoconference. Participants included several representatives from the various research centres and universities participating in the project, and, from the Executive Secretariat of the IOC, the Executive Director, the Deputy Executive Director and the Head of the Technical and Environment Unit.

The OliveMed2 project has two main objectives. First, researchers will aim to determine whether or not diversity in olive growing systems (traditional agroecosystems, monovarietal orchards, and very high-density systems) and diversity in olive oil markets are resilience factors for olive growing in the Mediterranean in a context of global change. Second, the genetic diversity of cultivated and wild olive trees will be studied to see if it can be an asset for adapting to climate change, such as overcoming winter cold and water deficits.

The ensuing discussions were a great source of motivation for launching the project, and the participants planned to appeal to other IOC member countries from the north of the Mediterranean to join the project.

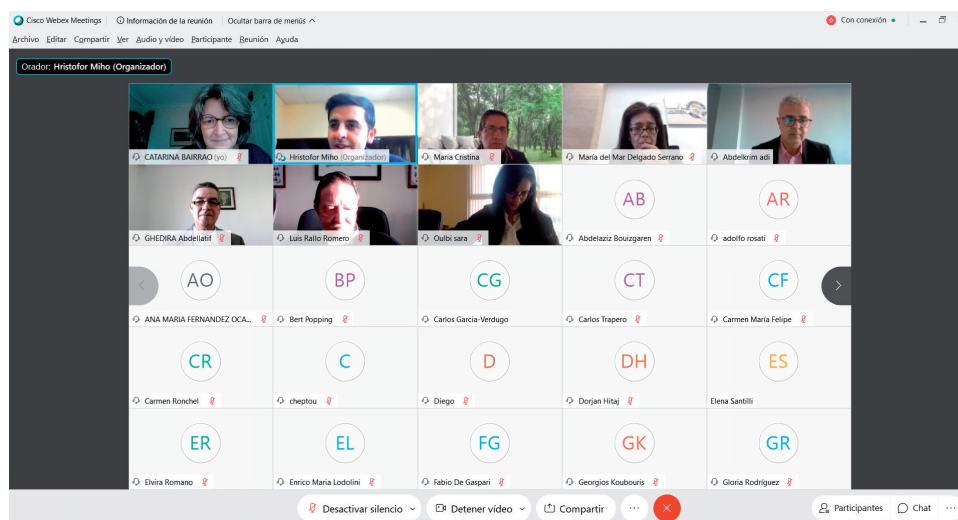


GEN4OLIVE: LAUNCH

MADRID/ On 19 October 2020, the IOC took part in the online launch event for the GEN4OLIVE project. The main objective of this project is to mobilise olive genetic resources and promote pre-breeding activities by developing an intelligent and user-friendly interface to provide users with accessible data.

From the University of Cordoba, Maria del Mar Delgado Serrano, Conchi Muñoz (representing Diego Barranco) and Hristofor Miho welcomed guests and presented the project.

The IOC also took the floor in its capacity as member of the project's advisory committee. Its highest representative, Executive Director Abdellatif Ghedira, spoke, as did Abdelkrim Adi, the Head of the Technical Unit, and Catarina Bairrao, the Head of the Training Department. Luis Rallo, the expert in charge of coordinating the germplasm collections, also took the floor. All speakers wished the project every success and stressed its importance for the world olive genetic resources, one of the IOC's priority areas. The long and fruitful relationship between the IOC and the University of Cordoba, particularly in the field of olive genetic resources, was one of the creative forces behind this project, in which 7 of the IOC Members and 5 olive germplasm banks are participating.



Through activities and projects on genetic resources, in particular the THOC project, the IOC aims to establish a link with GEN4OLIVE to characterise the olive genetic heritage of about 1 700 varieties.

For more details on the project, see <https://cordis.europa.eu/project/id/101000427>



ADVANCED COURSE ON MONITORING AND SURVEILLANCE OF OLIVE PATHOGENS

Live streaming online, 2-4, 9-11 & 14-16/12/2020

MADRID/ The IOC and the **Mediterranean Agronomic Institute of Zaragoza (IAMZ)** have planned to organise an advanced course on **Monitoring and Surveillance of Olive Pathogens in 2020**. Given the pandemic, they felt that, for safety reasons, the course should be given in online, maintaining interaction between lecturers and participants as much as possible.

The course will be given over nine working days, for four hours a day, divided into three modules: **2 to 4, 9 to 11 and 14 to 16 December 2020**. The schedule will be 14:00 to 18:30 (Central European Time) we can adapt to the various times zones represented. Lecturers and participants will be provided with technical and methodological advice to ensure efficient and dynamic virtual participation.

The course is aimed at the competent authorities in the field of plant health certification and inspection. The course is also open to plant protection service professionals, technical advisors and experts from R&D institutions working on disease diagnosis and pathogen prevention and control plans in the olive sector.





THE WORLD OF OLIVE OIL

Source: Economy and Promotion Unit



OLIVE OIL IMPORTS

Imports of olive oil rose by 23.3% in the first ten months of the 2019/20 crop year compared to the same period the previous crop year. Since the covid-19 pandemic was declared in March 2020, imports have risen by 42.3% compared to the same period the previous year.

	2013/2014	2014/2015	2015/2016	2016/2017	2017/2018	2018/2019	2019/2020	Average	%Variation Rates
AUSTRALIA	23789	19011	20697	24937	25563	26260	31315	24510	↑ 19.3
BRAZIL	60749	57073	39533	50270	64388	72862	88380	61894	↑ 21.3
CANADA	35626	32612	33163	33299	37629	38478	48204	37002	↑ 25.3
CHINA	26973	25975	28320	31488	30200	35814	40340	31301	↑ 12.6
JAPAN	44989	48534	43792	44210	44876	55838	57981	48603	↑ 3.8
Russia	25118	16756	15950	16443	16794	20157	22453	19096	↑ 11.4
USA	257341	250306	258066	252498	261447	288680	321005	269906	↑ 11.2
Extra-EU(9 months)	42101	167198	82843	69449	143584	112739	192834	115821	↑ 71
Total	516686	617465	522366	522595	624481	650828	802512	608133	↑ 23.3

Table I – Imports of olive oil in the 2019/2020 crop year (October-July. Extra-EU until June).

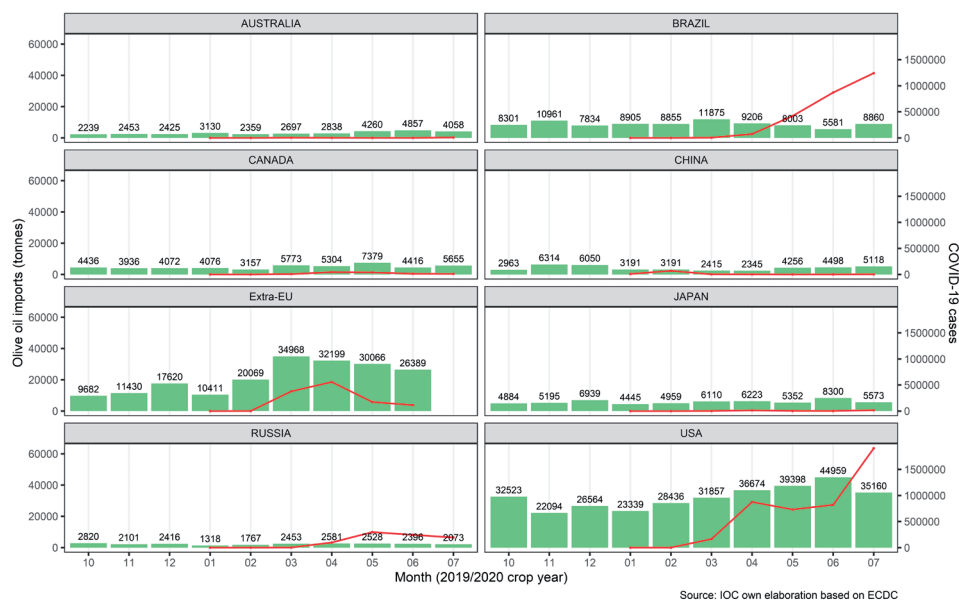


Between March and July 2020, imports of olive oil rose significantly in the main import markets. Imports rose in all markets by at least 20% compared to the same period the previous crop year, except China and Japan, which saw increases of 10.4% and 1.9% respectively.

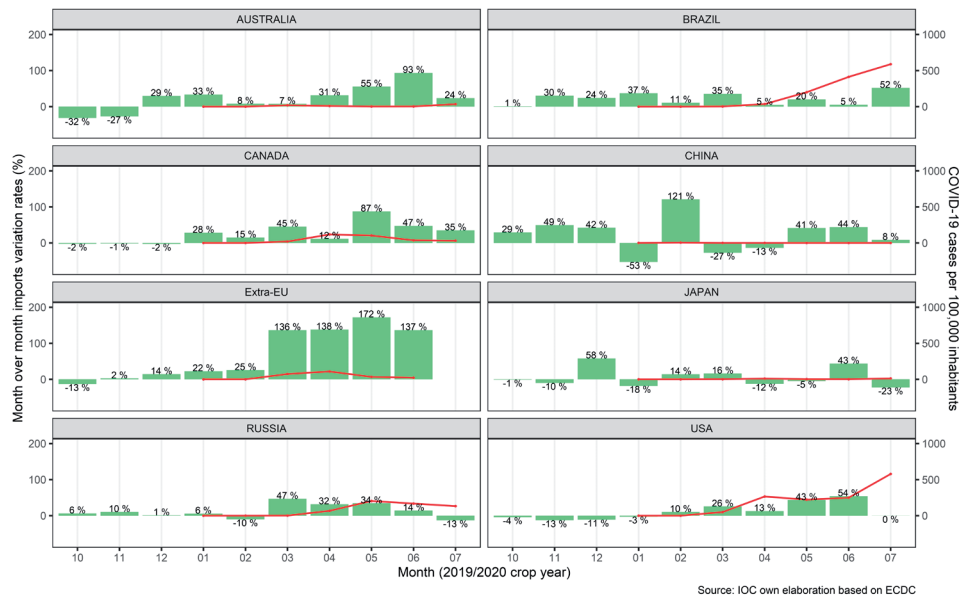
	2013/2014	2014/2015	2015/2016	2016/2017	2017/2018	2018/2019	2019/2020	Average	%Variation Rates
AUSTRALIA	12966	8513	11957	11092	14768	13208	18710	13031	↑ 41.7
BRAZIL	28249	22363	19307	22611	32050	35398	43525	29072	↑ 23
CANADA	20197	17321	17471	16486	20244	19859	28527	20015	↑ 43.6
CHINA	14540	14042	13886	12870	11965	16869	18631	14686	↑ 10.4
JAPAN	24850	28108	25884	24885	24008	30961	31559	27179	↑ 1.9
Russia	13300	5766	8892	9476	8910	9991	12031	9766	↑ 20.4
USA	144362	136657	142899	133376	143242	149822	188048	148344	↑ 25.5
Extra-EU(4 months)	9255	109270	30078	27599	70702	50524	123623	60150	↑ 144.7
Total	267718	342040	270373	258396	325889	326632	464654	322243	↑ 42.3

Table II – Imports of olive oil March–July 2020. Extra-EU until June.

Overall, all markets saw growth between March and July 2020 compared to the same period the previous year, particularly in the EU, where imports shot up with sustained growth of over 100%.



Graph I – Imports of olive oil in the 2019/2020 crop year and cases of COVID-19.



Graph II – Imports of olive oil in the 2019/2020 crop year and cases of COVID-19 per 100 000 population.

In the first ten months of the 2019/20 crop year, the main suppliers of olive oil were Tunisia, Spain, Italy and Portugal with market shares of over 10%.

	2016/2017	2017/2018	2018/2019	2019/2020	%Share	%Variation rates
TUNISIA	64208	142376	118501	253900	31.6	↑ 114.3
SPAIN	194909	185577	233598	219918	27.4	↓ -5.9
ITALY	148514	138049	148022	151612	18.9	↑ 2.4
PORTUGAL	30554	41245	51126	87360	10.9	↑ 70.9
TURKEY	17916	40830	26356	24596	3.1	↓ -6.7
ARGENTINA	13569	18823	11019	16066	2.0	↑ 45.8
GREECE	15462	15093	16257	15967	2.0	↓ -1.8
CHILE	8053	10520	10071	9772	1.2	↓ -3
MOROCCO	7365	4985	19367	9424	1.2	↓ -51.3
Others	22045	26983	16512	13897	1.7	↓ -15.8
Total	522595	624481	650828	802512	100	↑ 23.3

Table III – Imports of olive oil in the 2019/2020 crop year by country of origin (October-July. Extra-EU until June).



Between March and July 2020, imports rose in Tunisia (219.4%), Italy (20.1%), Portugal (98.3%), Turkey (12.1%) and Greece (7.8%) compared to the same period the previous crop year. Spain was the only to fall among countries with market shares of over 1%.

	2016/2017	2017/2018	2018/2019	2019/2020	%Share	%Variation rates
TUNISIA	25250	84044	55067	175893	37.9	↑ 219.4
SPAIN	100445	97377	126764	109574	23.6	↓ -13.6
ITALY	72044	70514	75427	90601	19.5	↑ 20.1
PORTUGAL	14491	19926	24567	48715	10.5	↑ 98.3
TURKEY	10849	22424	11810	13234	2.8	↑ 12.1
GREECE	8775	9301	8372	9026	1.9	↑ 7.8
Others	26541	22304	24626	17611	3.8	↓ -28.5
Total	258396	325889	326632	464654	100	↑ 42.3

Table IV – Imports of olive oil March-July 2020 by country of origin. Extra-EU until June.



I. WORLD TRADE IN OLIVE OIL AND TABLE OLIVES

1. OLIVE OIL – 2019/20 CROP YEAR

The table below shows trade in olive oil and olive-pomace oil in eight countries in the first ten months of the current crop year (October 2019 – July 2020). Imports rose in Canada (26%); Brazil (21%); Australia (18%); Russia (13%); China (16%); the United States (10%); and Japan (5%).

In the first nine months of the 2019/20 crop year, intra-EU acquisitions grew by 10% and extra-EU imports grew by 45% compared to the same period the previous crop year.

OLIVE OIL IMPORTS (INCLUDING OLIVE POMACE OIL)(T)									
Country	NOV 18	NOV 19	DEC 18	DEC 19	JAN 19	JAN 20	FEB 19	FEB 20	MAR 19
Australia	3378.8	2471.8	1894.3	2446.6	2363.8	3130.2	2208.2	2375.6	2548.4
Brazil	8467.6	10999.9	6310.5	7845.2	6515.5	8938.4	8022.5	8860.8	8848.9
Canada	4028.9	4001.1	4217.5	4182.1	4104.4	2778.9	3222.5	3222.5	4017.0
China	4405.4	6565.4	4740.2	6586.4	7115.2	3542.4	1520.3	3542.4	3598.7
Japan	5893.7	5298.7	4610.2	7189.2	5594.4	4643.6	4489.0	5125.7	5398.7
Russia	2291.4	2628.9	2836.1	2904.4	1420.6	1593.7	2177.9	2122.7	1970.7
USA	26394.3	26394.3	22626.7	30983.4	27204.7	24753.6	23870.3	29002.5	25869.5
Extra-EU	14892.6	11496.3	19103.1	17621.2	14229.4	14532.4	19875.5	21666.8	18327.4
Intra-EU	91148.2	103359.5	102335.2	118839.5	94954.1	102450.5	98532.5	105366.4	99815.8
Total	160900.9	169448.3	177030.5	194816.3	160192.6	166805.9	165897.8	181285.4	170395.0

OLIVE OIL IMPORTS (INCLUDING OLIVE POMACE OIL)(T)									
Country	MAR 20	APR 19	APR 20	MAY 19	MAY 20	JUN 19	JUN 20	JUL 19	JUL 20
Australia	2633.4	2178.1	2800.3	2777.4	4259.8	2583.8	4876.5	3302.4	4135.6
Brazil	11911.3	8794.1	9276.8	6699.1	8037.8	5323.9	5583.8	5878.6	8861.5
Canada	5877.1	4763.8	5477.6	3986.2	7404.6	3013.6	4463.3	4210.5	5698.6
China	2780.2	3047.9	2549.1	3275.0	4602.8	3252.2	5729.5	4891.7	5480.4
Japan	6332.9	7211.1	6473.0	5832.1	5507.6	5786.2	8549.2	7201.3	5844.9
Russia	2935.8	2351.1	3061.1	2251.3	3066.7	2594.0	2690.1	2844.1	2484.2
USA	32358.3	33158.2	37219.0	28349.6	39712.1	29734.5	45347.2	36012.3	35315.3
Extra-EU	37832.2	14793.0	32364.3	16365.3	31194.9	12380.0	27125.6	12268.9	-
Intra-EU	108906.5	94274.0	101550.7	90213.9	91445.7	90792.1	96867.2	109536.5	-
Total	211567.8	170571.3	200772.0	159749.8	195238.0	155460.1	201232.4	186146.3	67820.5



2. TABLE OLIVES – 2019/20 CROP YEAR

The table below shows trade in table olives in the first 11 months of the 2019/20 crop year (September 2019 – July 2020). Imports grew by 3% in both Canada and Brazil but fell by 14% in Australia and 13% in the United States compared to the same period the previous crop year

TABLE OLIVE IMPORTS (T)										
Country	OCT 18	OCT 19	NOV 18	NOV 19	DEC 18	DEC 19	JAN 19	JAN 20	FEB 19	FEB 20
Australia	3378.8	2471.8	1894.3	2446.6	2363.8	3130.2	2208.2	1488.0	1233.8	1164.9
Brazil	12056.6	12570.2	12807.1	13466.6	9626.1	11834.1	7349.8	9248.7	9384.3	9559.4
Canada	2641.3	2934.7	2848.2	2863.4	2403.5	3192.4	2326.4	2594.0	2112.2	2050.4
USA	11907.0	14945.7	13040.2	13593.2	11242.6	11738.4	12164.6	10062.5	9854.0	9311.0
Extra-EU	8807.6	8514.3	9501.1	9282.0	8713.5	9596.4	10517.6	9440.1	9519.6	8643.9
Intra-EU	31315.6	40385.0	34606.4	33707.0	29204.6	28889.4	23680.6	25657.6	25012.7	25211.3
Total	68191.0	80537.5	74800.5	74518.7	62423.2	66565.9	57466.9	58491.0	57116.4	55940.8

TABLE OLIVE IMPORTS (T)										
Country	MAR 19	MAR 20	APR 19	APR 20	MAY 19	MAY 20	JUN 19	JUN 20	JUL 19	JUL 20
Australia	1848.5	1313.1	1590.2	1189.3	1556.4	1272.0	1191.9	1448.6	1949.8	1507.1
Brazil	8535.6	9705.8	10371.6	8022.8	9465.4	8040.0	7874.0	9629.6	10907.8	10512.5
Canada	2695.6	3172.0	3071.6	2659.9	2993.9	3267.6	2625.2	2542.3	2850.0	2511.3
USA	15965.2	12787.5	16395.3	11315.2	14787.7	11190.6	16081.7	10680.7	18172.0	10251.1
Extra-EU	11044.0	12928.9	12024.3	11161.6	19875.5	9479.6	8362.4	8996.9	10226.5	-
Intra-EU	27382.2	31488.1	29124.2	21986.9	30823.2	23753.9	30453.3	28500.3	34003.2	-
Total	67471.2	71395.5	72577.2	55317.7	71221.3	57003.7	66588.6	61798.5	78109.3	24782.0

In the first ten months of the 2019/20 crop year (September 2019 – June 2020), intra-EU acquisitions fell by 1% and extra-EU imports by (1%) compared to the same period the previous crop year.



II. PRODUCER PRICES – OLIVE OIL

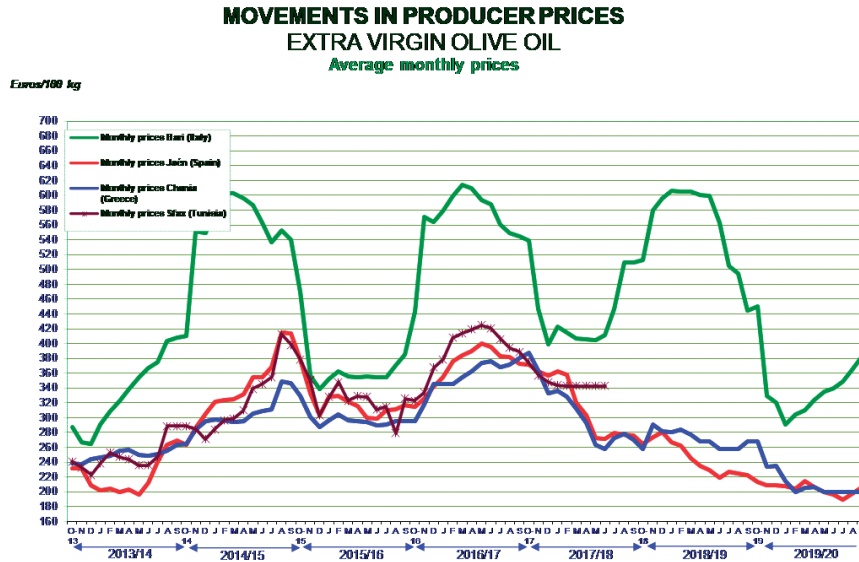
Monthly price movements for extra virgin olive oil and refined olive oil are shown in graphs 1 and 2.

Extra virgin olive oil – Producer prices in Spain in the second week of September 2020 stood at €2.13/kg, a 4% fall compared to the same period the previous crop year.

Italy – Prices in Italy in the last week of September 2020 stood at €3.85/kg, a 17% fall compared to the same period the previous crop year..

Greece – Prices in Greece in the second week of September 2020 stood at €2.00/kg, a 25% fall compared to the same period the previous crop year.

Tunisia – Prices in Tunisia remained stable in the last weeks of June 2018, at €3.43/kg, an 18% fall compared to the same period the previous crop year.

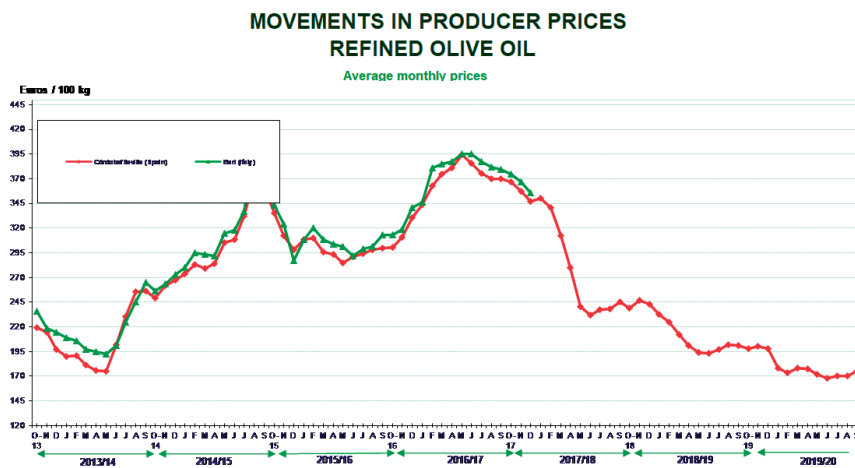


Graph I



Refined olive oil: Producer prices in Spain stood at €1.80/kg in the last week of September 2020, which indicates a fall of 11% compared to the same period the previous crop year. Data for Italy in this category have not been available since the end of December 2017 when they had increased by 4% to €3.56/kg.

In the last week of September 2020, the difference between the price of extra virgin olive oil (€2.13/kg) and refined olive oil (€1.80/kg) in Spain was €0.33/kg. In Italy, the difference was €0.43/kg in December 2017 (Graph 2).



Graph 2



STAY TUNED!

<http://www.internationaloliveoil.org>

Keep up with the olive sector through Olive News:

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and the goings on at the IOC:

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IOC Head quarters:
C/ Príncipe de Vergara 154, Madrid