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THE CONCLUSION OF THE 112TH SESSION OF THE COUNCIL OF MEMBERS

MADRID/ A packed schedule has come to an end: meetings all week, a seminar on the future of the olive sector, the prize-giving ceremony of the Mario Solinas Quality Award, and the presentation of OLIVAE 127 on the Egyptian olive sector.

The 112th session of the Council of Members of the International Olive Council has been concluded. The session was held entirely by videoconference from Monday 23 to Friday 27 November 2020. This is the second session in 2020 to take place remotely via headquarters on Calle Principe de Vergara in Madrid. This week, all committees met to examine and approve the reports of the Administrative and Financial Affairs Unit and the operational Chemistry and Standardisation Unit, Technology and Environment Unit, Economics and Promotion Unit and the Observatory.

This session was distinguished for the international seminar on the "Future of the olive sector" held on the first anniversary of UNESCO's creation of World Olive Day on 26 November. More information on the seminar can be found through the link below, which also contains a recording of the whole conference in English, French and Spanish:

https://v28706885-my.sharepoint.com/:f:/g/personal/j_morante_internationaloliveoil_org/EoJ-zLE-Q4sVLhJQgP_YY6IEBSzXEE37aiJdhyX1cMzT00A?e=2xmlai

Among the important initiatives that took place during the 112th session, we would like to highlight the ceremony to present the winners of the Mario Solinas Quality Award, which can be further explored at the following link: <https://www.internationaloliveoil.org/mario-solinas-quality-award-2020-the-winners/>.

We would also like to highlight the presentation of this year's edition of OLIVAE, which was entirely dedicated to the Egyptian olive sector.

Download it here free of charge: <https://www.internationaloliveoil.org/product/olivae-127-english-edition/>.



As we await the confirmation of the dates for the sessions in 2021, the Council of Members, at the request of the current Chair, George Svanidze, decided to extend the chair to Georgia for another year.

After the pandemic passes and restrictions are lifted, the Chair hoped to host one of the next two sessions, including both the session of the Council of Members and the meeting of the Advisory Committee, in his country in 2021.



STANDARDISATION AND RESEARCH UNIT

A very good team effort produced big results. Here we publish the documents adopted at the 112th session of the Council of Members in Chemistry field prepared for adoption by the IO Executive secretariat's Standardisation and Research Unit.

After their adoption at the 112th session of the Council of Members, the following documents were published on our website:

The rules for the Mario Solinas Quality Award, the international competition for extra virgin olive oil, can be found here: <https://www.internationaloliveoil.org/what-we-do/chemistry-standardisation-unit/#national-competitions-in-English-French-and-Spanish>.

The rules for national extra virgin olive oil competitions with institutional sponsorship from the International Olive Council as well as the corresponding decisions can be found here: <https://www.internationaloliveoil.org/what-we-do/chemistry-standardisation-unit/#institutional-in-English-and-French>.

The lists of physico-chemical and sensory analysis laboratories with International Olive Council recognition for the period from 1 December 2020 to 30 November 2021 can be found here: <https://www.internationaloliveoil.org/what-we-do/chemistry-standardisation-unit/#recognition-laboratories>

The Guidelines for the management of virgin olive oil tasting panels in the event of a pandemic - COI/MPP/Doc. No. 1/Rev. 1 can be found here: <https://www.internationaloliveoil.org/what-we-do/chemistry-standardisation-unit/standards-and-methods/in-English-and-French>.

The Consumer guidelines on the best storage conditions for olive oils and olive pomace oils - COI/CBPS/Doc. No. 1 can be found here: <https://www.internationaloliveoil.org/what-we-do/chemistry-standardisation-unit/standards-and-methods/in-English-and-French>.

THE 55TH MEETING OF THE ADVISORY COMMITTEE

In videoconference, 10 November 2020

The Advisory Committee (AC) on Olive Oil and Table Olives, chaired by Ali Ben Hadj M'Barek (Tunisia), met by videoconference on Tuesday, 10 November 2020. Over 90 participants representing the different professional categories of the olive sector.

The Executive Secretariat (ES) presented the activities on the agenda, the content of which had been published in the private area of the IOC website reserved for participants of the 55th meeting of the AC.

1- Debates:

The participants gave 30 important and varied addresses at the meeting, reflecting on the interests of the different sections of the olive sector. The main theme was the willingness to cooperate and coordinate to harmonise standards, notably those relating to organoleptic and physico-chemical analyses, to fight fraud, the unanimous report on changes in the consumption of olive oil by households and the drop in activity in the hotel, restaurant and café sector (HORECA), the continuation of research to fight *Xylella fastidiosa* and the effects of Covid-19 on the olive sector.



The main points made by the participants were the following:

- The difficulties encountered by professionals in the sector resulting from *Xylella fastidiosa* (mainly in Italy), aggravated by the covid-19 pandemic which has heavily affected rural and agricultural tourism.
- Although the tasting panel remains the only method for determining an extra virgin oil, it must be improved, as it is a bad practice. Some speakers proposed a consultation between professionals and experts to propose innovative methods for organoleptic assessment.
- The increase in the consumption of olive oil by households. Household awareness of the benefits of this product should be used to focus promotion on this aspect and encourage them to continue this trend.
- The observation of a drop in the consumption of vegetable oils.
- The need to determine where low consumption was found in producer countries (cafés, hospitals, schools, universities, etc.).
- The opportunity to eradicate the term "fraud" from the olive sector, as well as any shadow of suspicion, as it is detrimental to all professionals. This was a question of discrepancies in sensory analysis than premeditated fraud. Methods of application must be found to guarantee legal security for industry workers and to protect the consumer because benefits and fraud are two contradictory terms.
- Olive pomace oil suffered most during the pandemic because it is more often used by the HORECA sector. Its price had fallen drastically, its storage had increased and its consumption had slowed down; the whole production chain of this oil suffered. The sector needed to be revived and to be more competitive.
- The need to extend the survey on consumer behaviour to other producer countries and to reschedule the seminar on the effects of oil extraction procedures on quality.
- The introduction of olive cultivation in the climate change summit.
- The launch of a study on water management in the olive-growing sector to anticipate the expected limits of water resources.
- The strengthening of promotional activities in the producing countries with an emphasis on the nutritional and therapeutic values of olive oil.
- Several countries, such as Egypt, have planned the expansion and modernisation of the sector while world prices do not encourage investment, and this dates back to before the pandemic. What mechanisms can be used to stabilise the market?
- Concerns about IOC standards and the proposed elimination of the ordinary olive oil by Codex were the responsibility of all IOC member countries that are signatories to the Agreement.
- The opportunity to promote not only extra virgin olive oil but also all other olive oils more accessible to the household purse.

The Chair thanked all the speakers and gave the floor to the observers:



NAOOA (United States):

Mr Profaci thanked the Chair of the AC for giving him the opportunity to attend the meeting and informed the participants of the increase in olive oil consumption in the United States, particularly thanks to households with significant health concerns in this period of pandemic. According to a survey, he continued, olive oil is ranked among the healthiest foods, which has led to a real awareness among American consumers about the health benefits of this product. He added that the number of households using olive oil increased 9% to 43%, and that some of the increase reflected a switch from vegetable oil users. Given the rise in demand for olive oils, he concluded that it was necessary to remain vigilant about a potential increase of fraud.

AOOA (Australia):

The Australian representative also thanked the AC for the opportunity and indicated that despite lockdown, olive oil consumption was on the rise, thanks to households. His concern was about the impact of the economic downturn, which was having an impact on consumer purchasing power and which could divert consumers away from olive oil.

2- Responses from the Executive Secretariat

The ED, Mr. Abdellatif Ghedira, took the floor to thank the representatives of the American and Australian associations and to react to some of the comments made by the speakers:

First, he recalled the exceptional nature of the AC, pointing out that few international organisations have such a body. He also offered his condolences to the representatives of Turkey for the earthquake that had devastated part of Izmir and caused human and material damage.

He went on to point out that the presence of observers, and in particular the signatory associations to the Agreement, enriched the debates.

Regarding statistics, he said that the figures presented were those communicated at the meeting of statistical experts on 4 November 2020. He indicated that the opinion of the professionals was very interesting and reiterated that the figures presented, particularly for the 2019-20 crop year, remained provisional until they had been endorsed by the Council and that those for 2020-21 were presented as estimates.

The ED added that the issue concerning Codex was fundamental:

- Members of the IOC are obliged to comply with the Organisation's standards in international trade.
- A quality strategy committee was established within the IOC. It had already met and would meet again to make proposals for the future of the standard and to prepare the new International Agreement to be discussed at UNCTAD in 2025.
- The Codex worked very closely with the IOC. The document presented by the Codex eWG did not respect the standards and opinions of the IOC member countries by calling for the removal of ordinary olive oil. This would be a first, as the Codex standard had always followed the work and guidance of IOC experts. Although the elimination of the ordinary category was inevitable, it was recommended that a



transitional phase be taken into account to allow some countries to adapt quality policies. He recalled that the IOC was an observer at Codex and that it was up to member countries to act accordingly.

- Olive oil represents less than 3% of vegetable oils. The margin of progress was enormous and competition between the different producers was not necessary. They should instead opt for consultation and cooperation.
- Organoleptic assessment remained essential, but it was imperative to improve it so that exporters could operate with peace of mind.
- He said he was fully in tune with the stakeholders who are calling for the best means to fight fraud and for a concerted arbitration mechanism to be set up.
- The table olive: we must give it the same importance as we give olive oil. He proposed the AC set up the two sections of olive oil and table olive provided for in the regulations.
- With regard to the nutritional and therapeutic benefits of olive oil, he pointed out that an international seminar would be held on 26 November on World Olive Day and that among the themes chosen, this subject would be discussed. He took the opportunity to invite all participants to join this seminar.
- Finally, he reminded the AC that the lists of members of this Committee are drawn up by the representatives of the member countries and the most representative associations of the four categories (producers, industrialists, traders and consumers) for the EU. He pointed out that he had invited certain important non-nominated associations to attend this meeting as observers and recommended that the Chair of the AC raise this issue at the next session of the Council of Members.

3- Production forecasts for the 2020/21 crop year:

Algeria: Production down by 40% for olive oils and by 45% for table olives, mainly due to drought, forest fires and the climate. Estimated production: less than 100 000 t for olive oil and 170 000 t for table olives.

Australia: Fires, drought and this being an 'off' crop year in terms of bearing caused production to fall to 10 000 t of olive oil.

Spain: A rather good harvest, estimated between 1 450 000 t and 1 500 000 t of olive oil.

France: second year of poor harvest due to drought and late cold: 4 200 t (3 500 t in 2019). Consumption continues to increase, with a rise in the market for high quality oils with a strong symbol of authenticity.

Greece: Production is almost similar to that of 2019 but of better quality: between 220 000 t and 230 000 t, with significant differences between regions.

Iran: The harvest will be 30% lower than last year.

Italy: 30% drop in southern Italy, which will not be compensated for by good production in the north. Production estimated at 250 000 t.

Jordan: Demand falls by 20%. As for production, 190 000 t of olives and 27 000 t of olive oil, a drop of 20% compared to 2019/20.



Morocco: Drop in consumption in the HORECA sector despite a slight increase in households. Production up by 14%, i.e. the equivalent of 160 000 t.

Portugal: Production 100 000 t (compared to 150 000 t last year). The objective is to reach 200 000 t in the coming years (an irrigated olive tree planting programme is underway). Domestic consumption up 6% compared to 2019 (thanks to households). Exports increased by 30%.

Tunisia: Production in decline (146 000 t of olive oil) due to a rainfall deficit. An export of 120 000 t is expected.

After this round table on the forecasts for the 2020/21 crop year, the Chair of the AC gave the floor to the Chair of the Council. He confirmed that Russia, Moldova, Kyrgyzstan, Saudi Arabia could be part of the IOC family. He called for the meetings to become face-to-face again. He concluded by inviting the members of the AC to meet again in Georgia for the 56th AC meeting. The Chair of the AC gives the floor to the Deputy Executive Directors:

Jaime Lillo thanked the participants at the 55th AC meeting and informed them that the IOC had taken note of all their remarks and suggestions, in addition to those to which the ED had already reacted. He was pleased to learn that olive oil consumption was on the rise despite the economic crisis caused by the pandemic, which was encouraging in the expectation of better prices.

Mustafa Sepetçi stated that he had listened very carefully to the participants and had the following two remarks:

- He took note of the efforts made by Egypt to use olive leaves in the production of a covid-19 vaccine to draw a stronger substance. This showed that it was possible to make use of all parts of the olive tree, not only the oil and fruits.
- The future of the olive oil market: he pointed out that consumption is tending more and more towards quality. However, if the pandemic continues, uncertainty may prevail in the world economy. The sector and the IOC will be able to overcome this challenge by promoting all categories of olive oil in order to address all sections of the community.

4- Recommendations of the AC to the Council of Members:

- Postpone the elimination of ordinary olive oil from the Codex standard until studies on its impact on the consumer had finished.
- Revise the lists of members of the AC of the EU in order to reinstate influential and important associations that have been removed from the current list.
- The recasting of the IOC quality standards to take into account changes in the sector and technologies, a consultation between professionals and their fellow citizen members of the IOC expert groups was recommended.
- The holding of the 56th meeting of the AC in Georgia.



5- Closing of the meeting

At the end of the meeting, the Chair of the AC warmly thanked all participants and the IOC officials for the efforts made during the pandemic and looked forward to seeing all members at the 56th meeting. The ED took the floor to express, on his own behalf and on behalf of all IOC officials, his appreciation to the Chair of the AC and to the Chair of the Council of Members.

VISIT OF THE AMBASSADOR OF URUGUAY TO IOC HEADQUARTERS

On 1 December 2020, Abdellatif Ghedira, the Executive Director of the International Olive Council, welcomed H.E. Ana Teresa Ayala Barrios, the Ambassador of the Oriental Republic of Uruguay in Madrid, who came to pay him a courtesy visit.

The meeting provided an opportunity to take stock of the state of cooperation between the Executive Secretariat and Uruguay and then to take it to a higher level. The two sides planned to hold a videoconference to discuss ways to strengthen that cooperation.



MARIO SOLINAS QUALITY AWARD 2020: THE WINNERS



The aim of organising this competition is to encourage individual producers, producer associations and packers in the producing countries to market extra virgin olive oils displaying harmonious organoleptic characteristics and to encourage consumers to recognise and appreciate the sensory attributes of such oils.

On 26 November 2020, the Executive Secretariat held the prize-giving ceremony for the Mario Solinas Quality Award 2020. The ceremony took place by videoconference as part of the celebrations for the first anniversary of the creation of World Olive Day by UNESCO. This year, entries were classified into one of five categories: robust; medium and delicate green fruitiness; ripe fruitiness; and extra virgin olive oil from the southern hemisphere.



Mercedes Fernandez, the Head of the Standardisation and Research Unit, presented the characteristics of the winning oils and congratulated all winners and finalists. The winners had sent in short videos on their production of extra virgin olive oils to show to the guests. Thanks again to all our participants; we hope to see you next year!

[Prize winners and finalists -MS-2020-EN](#)

WORLD OLIVE DAY: AN INTERNATIONAL CELEBRATION

Three hundred stakeholders joined us from all over the world, united by olive oil.

On 26 November, the International Olive Council celebrated the first anniversary of World Olive Day since its creation by UNESCO in 2019.

To mark the occasion, the Executive Secretariat organised an international seminar on "The future of the olive sector" for institutional representatives, including UNESCO, as well as top scientific and university experts, consumers and women's olive oil associations from around the world. Almost three hundred people connected for over six hours of speeches and celebrations.



[Séminaire JMO EN](#)

To help you follow the seminar more easily, here is the programme of the conference in English and French and the link to watch the seminar in its entirety:

https://v28706885my.sharepoint.com/:f:/g/personal/j_morante_internationaloliveoil_org/EoJ-zLE-Q4sVlhJQqP_YY6IEBSzXEE37aiJdhyX1cMzT00A?e=P9llxh



THE IOC NETWORK OF GERmplasm BANKS AND PHYTOSANITARY MANAGEMENT

The International Olive Council (IOC) organised from 9 to 11 December 2020 a videoconference with the IOC olive germplasm banks curators on the current status of the banks' network and on its phytosanitary management.

During this meeting, the importance of the harmonisation of the banks in terms of cataloguing, sanitation and management was emphasized.

The banks' curators were also informed jointly by the IOC and the Food and Agriculture organization of the United Nations (FAO) on the Memorandum of understanding that is promptly to be signed between both institutions and on the important role that the International Treaty on Plant Genetic Resources for Food and Agriculture (ITPGR FAO- IOC) may have on the consolidation of the olive germplasm network.

It was also an opportunity to introduce the new step of the True Healthy Olive Cultivars Project, that aims to continue authenticating the most important commercial cultivars found in the World Olive Germplasm bank collection at the University of Córdoba and those of commercial interest in the participating banks on the IOC network. It also aims establishing motherplants of initial material to obtain healthy and authentic initial material for cultivars of commercial interest, that will be allow providing the participating national banks on the network with plant material that is genetically and morphologically authenticated and healthy, with a view to establishing them as motherplants in order to certify authentic and healthy nursery plants in the respective countries and in international trade.

With this in mind, the European and Mediterranean Plant Protection Organisation (EPPO) was invited to introduce its Voluntary System Preventing Pests on olive plant certification.

It was also announced that, after the authentication of variety denominations, the IOC will start working on the preparation of a future catalogue of the main commercial varieties to be published in 2022/23.

This gathering was also a way of reinforcing the integration and articulation of all the banks, proposing valuable suggestions for future collaborations.

A new meeting of the IOC olive germplasm Banks is expected to take place in October 2021 in Marrakech.

ADVANCED COURSE ON MONITORING AND SURVEILLANCE OF OLIVE PATHOGENS

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

The International Olive Council (IOC) and the Mediterranean Agronomic Institute of Zaragoza (IAMZ) organised an advanced course on Monitoring and Surveillance of Olive Pathogens in live streaming online modality, from 2 to 16 December 2020.

The course was aimed at the competent authorities in the field of plant health certification and inspection, 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, together with olive germplasm banks' technicians.





It counted with 50 participants from Albania, Algeria, Argentina, Croatia, Greece, Iran, Italy, Jordan, Lebanon, Morocco, State of Palestine, Portugal, Slovenia, Spain, Tunisia and Turkey.

By participating in this course technicians are expected to:

- Have acquired sound knowledge on the biology, ecology and epidemiology of the main pathogens threatening olive, focusing on *Xylella fastidiosa* and *Verticillium dahliae*;
- Have understood the regulatory context and international standards under which the surveillance and monitoring of olive pathogens are performed;
- Be able to identify the relevant parameters for survey design and efficient monitoring with the particular focus on sampling procedures and diagnostics using *Xylella fastidiosa* and *Verticillium dahliae* as case studies.
- Be able to prepare and design risk-based surveys and monitoring activities.
- Have networked with professionals and key actors in IOC member countries, exchanged experiences and strengthened cooperation to deal with emerging and re-emerging diseases in olive



OLIVAE 127 IS LIVE

EGYPT: STANDING ON THE SHOULDERS OF GIANTS

Here is the latest issue of the official magazine of the IOC

In this year's issue of OLIVAE, we welcome Egypt, a country with a long and rich history, and one of the first to sign the International Agreement on Olive Oil and Table Olives. Egypt worked in perfect harmony with the Executive Secretariat when it held the chair of the International Olive Council in 2019, and our member countries wanted to dedicate this issue to a country that has always been a key player in the international olive sector.

The pandemic that shook the world in 2020 had no impact on the editorial committee the Executive Secretariat set up in Cairo. A dedicated committee of prestigious scientists worked hard to bring you this issue, and we give thanks to the authors.





Together, they created an editorial product of great cultural value. Through the quantity and quality of the content, issue 127 will be an indisputable source of information for the global community. Egypt's figures are significant, unique and above all promising for the years to come and there are things in this issue that will surprise you.

The magazine is already available and free of charge on our website at <https://www.internationaloliveoil.org/product/olivae-127-english-edition/>

In the coming weeks it will also be possible to download the other versions in Arabic, French, Italian and Spanish free of charge.

Enjoy!

COURTESY VISIT OF THE TUNISIAN AMBASSADOR TO THE IOC

TUNISIA has a total surface area of 163,610 km², 1,855,000 ha of which are used for olive growing.



H.E. Mrs. Fatma Omrani, recently appointed Ambassador of Tunisia in Madrid, began her series of courtesy visits by the International Olive Council on December 15, 2020. She was received by Mr. Abdellatif Ghedira, Executive Director (ED) of the Council, as well as by senior Tunisian officials working at the IOC.

The ED congratulated the Tunisian diplomat on her appointment as head of the Tunisian diplomatic mission in Madrid and expressed his wishes for success in her new mission. He also briefly briefed her on the activities carried out by the Executive Secretariat of the Organization and on ways and means to strengthen bilateral cooperation between the two parties.

H.E. Mrs. Omrani thanked the ED for her welcome and informed him that she was anxious to begin her courtesy visits with the IOC for the importance of this Organization for her country. She also stressed that she would closely follow the work of the IOC and that she would maintain regular contact with the Executive Secretariat.

At the end of the meeting, the ED gave H.E. a tour of the headquarters premises and the olive gardens of the IOC.



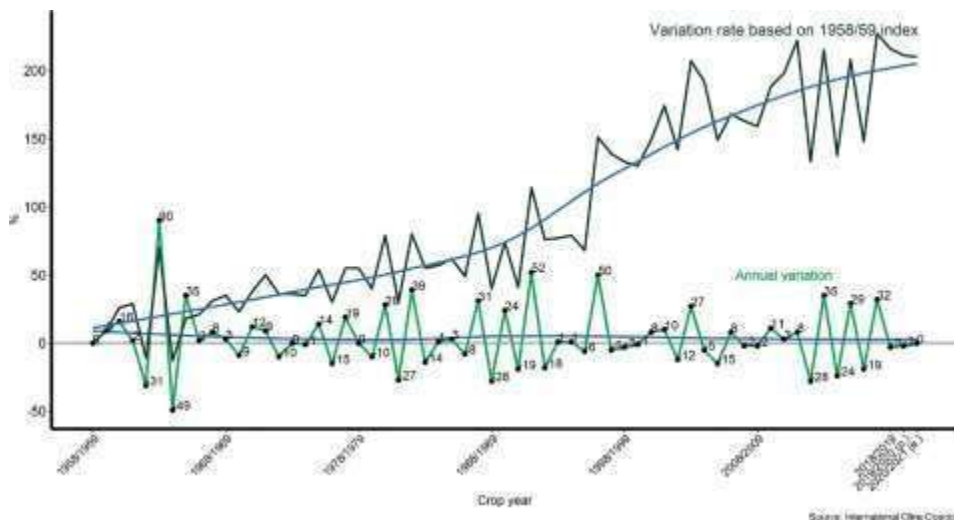
THE WORLD OF OLIVE OIL AND TABLE OLIVES

Source: Economy and Promotion Unit



EVOLUTION OF OLIVE OIL AND TABLE OLIVE PRODUCTION

Olive oil production has tripled in the last 60 years, reaching 3,262,000 tons in the last campaign of 2018/19. Provisional figures for the 2019/20 marketing year point to a decrease of 1.7%, leaving production at 3,207,000t. The estimate for the 2020/21 marketing year puts production at 3,197,000t (-0.3%).



Graph I - Evolution of olive oil production. Annual variation rates and with base 1958/59.



1. OLIVE OIL - PROVISIONAL CAMPAIGN 2019/20

The 2019/20 season, although still with provisional data, shows world production of 3,207,000 t, a decrease of 1.7% (55,000 t) compared to the previous season, consumption of around 3,234,000 t (+5.8%) and imports and exports of 1,156,000 and 1,205,000 t respectively.

IOC member countries would have produced 3,008,500 t, or 93.8% of the world total, in the 2019/20 season. The production of the group of European countries would have reached 1,924,100 t, a decrease of 15% compared to the previous campaign. In Spain, production would have been 1,125,300 t (-37.1%), in Italy 366,000 t (+110.8%), in Greece 275,000 t (+48.6%) and in Portugal 140,500 t (+40.1%).

The production of the other IOC member countries would have increased by 32.9%, reaching a total of 1,084,500 t. Tunisia stands out with 350,000 t (+150%), followed by Turkey with 225,000 t (+16.3%), Morocco with 145,000 t (-27.5%) and Algeria with 125,500 t (+29.4%).

Consumption in IOC member countries would have reached 2,204,000 t, an increase of 3.4%, while in non-IOC member countries consumption would have been around 1,030,000 t, an increase of 11.4% compared to the previous campaign.

Production (*1000tn)	2015/2016	2016/2017	2017/2018	2018/2019	2019/2020(p.)	Average	2020/2021(e.)	% variation rates
EU, of which:	2 324	1 752	2 188	2 284	1 924	2 090	2 232	↑ 16.0%
SPAIN	1 403	1 291	1 252	1 790	1 120	1 374	1 096	↓ 41.8%
GREECE	303	195	346	185	275	264	355	↓ -2.8%
ITALY	476	162	429	174	366	325	355	↓ -10.3%
PORTUGAL	109	60	135	100	140	111	100	↓ -38.8%
Other IOC countries, of which:	668	620	1 007	816	1 084	839	767	↓ -29.3%
TUNISIA	140	100	305	140	350	211	120	↓ -63.7%
TURKEY	100	176	263	194	225	202	210	↓ -6.7%
MOROCCO	130	110	140	300	145	145	160	↑ 18.3%
ALGERIA	82	65	82	97	126	90	90	↓ -28.7%
EGYPT	16	30	40	41	42	34	40	↓ -6.8%
ARGENTINA	24	24	45	26	30	30	27	↓ -10.0%
Non-IOC producers:	184	190	184	183	198	188	198	↓ -6.2%
TOTAL	3 177	2 661	3 279	3 283	3 207	3 117	3 197	↓ -6.0%

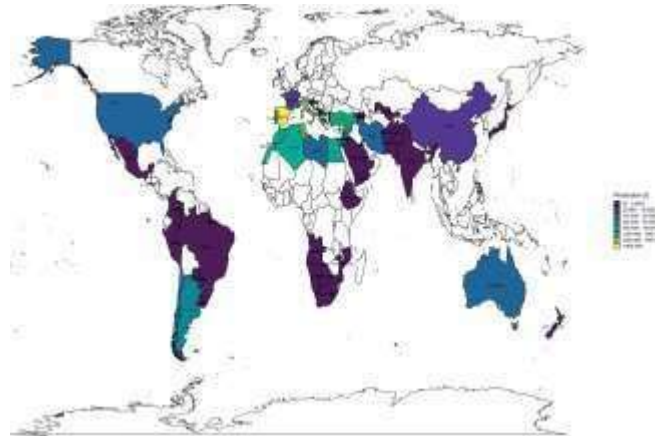
Table I - Production of olive oil

Olive oil - estimate for the 2020/21 crop year

According to official country data and estimates by the IOC Executive Secretariat, world production in the 2020/21 campaign could reach 3,197,000 t, which implies a decrease of 0.3% compared to the previous campaign. Imports and exports would amount to more than 950,000 t respectively.

The total production of the IOC member countries in 2020/21 would be 2,999,500 t, or 93.8% of the world total, a decrease of 0.3% compared to the previous campaign. The EU producer countries are forecasting production of 2,232,500 t, an increase of 16%. The other IOC member countries are estimated to produce a total of 767,000 t, a decrease of 317,500 t (29.3%) compared to the previous year.

World consumption could reach 3,185,500 t, a decrease of 1.5% compared to the previous campaign.



1. Table olives - Provisional 2019/20 campaign and estimate for 2020/21

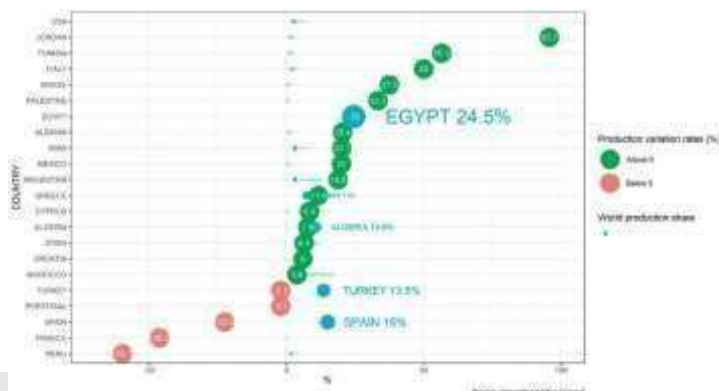


Figure II-Tableoliveproductiongrowth(2019/20-2018/19)andshareofproduction(2019/20)

World production for the 2019/20 campaign would amount to 3,057,500 t, an increase of 5.5% compared to the previous campaign. Among the IOC member countries, Spain stands out for its weight in world production (15%), despite a 22.5% drop. Egypt’s production has increased by 25% compared to the 2018/19 campaign, contributing 24.5% of the world total.

According to estimates for the 2020/21 campaign, production could increase by 2.5% compared to 2019/20, reaching 3,134,000 t, and consumption would increase by 0.4%.

Production (x1000t)	2015/2016	2016/2017	2017/2018	2018/2019	2019/2020(p.j)	Average	2020/2021(e.)	% variation rates
EU of which:	884	845	812	838	789	884	889	↑ 13.5%
FRANCE	501	495	482	491	455	502	507	↑ 28.7%
GREECE	194	181	201	200	222	211	200	↑ 5.6%
ITALY	68	43	40	46	83	53	59	↓ 10.3%
PORTUGAL	21	22	25	23	22	22	16	↓ 22.7%
Other IOC countries, of which:	1 284	1 425	1 866	1 728	1 987	1 728	1 842	↓ 4.2%
EGYPT	308	680	780	600	789	587	900	↓ 8.7%
TURKEY	307	400	430	423	414	417	425	↑ 3.3%
ALGERIA	201	289	354	305	325	385	310	↓ 4.2%
MOROCCO	125	130	130	135	125	127	126	↓ 8.7%
ARGENTINA	13	84	134	88	85	81	88	↓ 10.2%
USA	69	75	90	77	82	73	78	↓ 5.4%
Non-IOC producers:	328	384	428	501	382	389	368	↓ 10.2%
TOTAL	2 078	2 089	2 284	2 036	2 089	2 941	2 154	↑ 3.5%

Table II - Production of table olives



I. WORLD TRADE IN OLIVE OIL AND TABLE OLIVES

1. OLIVE OIL – 2019/20 CAMPAIGN

The trade of olive oil and olive pomace oil during the 2019/20 campaign (October 2019 - September 2020) in the 8 markets indicated in the table below shows an increase compared to the same period of the previous campaign of 24% in Canada, 21% in Brazil, 13% in Australia, Russia and China respectively, 11% in the United States and 2% in Japan. As regards EU trade in the first 11 months of the 2019/20 campaign, intra-EU purchases and extra-EU imports increased by 8% and 46% respectively compared to the same period of the previous year.

OLIVE OIL IMPORTS (INCLUDING OLIVE POMACE OIL) (T)									
Country	DEC 18	DEC 19	JAN 19	JAN 20	FEB 19	FEB 20	MAR 19	MAR 20	APR 19
Australia	1894.3	2446.6	2363.8	3130.2	2208.2	2375.6	2548.4	2633.4	2178.1
Brazil	6310.5	7845.2	6515.5	8938.4	8022.5	8860.8	8848.9	11911.3	8794.1
Canada	4217.5	4182.1	4104.4	2778.9	3222.5	3222.5	4017.0	5877.1	4763.8
China	4740.2	6586.4	7115.2	3542.4	1520.3	3542.4	3598.7	2780.2	3047.9
Japan	4610.2	7189.2	5594.4	4643.6	4489.0	5125.7	5398.7	6332.9	7211.1
Russia	2836.1	2904.4	1420.6	1593.7	2177.9	2122.7	1970.7	2935.8	2351.1
USA	22626.7	30983.4	27204.7	24753.6	23870.3	29002.5	25869.5	32358.3	33158.2
Extra-EU	19103.1	17621.2	14229.4	14532.4	19875.5	21666.8	18327.4	37832.2	14793.0
Intra-EU	102335.2	118839.5	94954.1	102450.5	98532.5	105366.4	99815.8	108906.5	94274.0
Total	177030.5	194816.3	160192.6	166805.9	165897.8	181285.4	170395.0	211567.8	170571.3

OLIVE OIL IMPORTS (INCLUDING OLIVE POMACE OIL) (T)									
Country	APR 20	MAY 19	MAY 20	JUN 19	JUN 20	JUL 19	JUL 20	AUG 19	AUG 20
Australia	2800.3	2777.4	4259.8	2583.8	4876.5	3302.4	4135.6	2980.3	2298.2
Brazil	9276.8	6699.1	8037.8	5323.9	5583.8	5878.6	8861.5	7374.0	7237.1
Canada	5477.6	3986.2	7404.6	3013.6	4463.3	4210.5	5698.6	4813.6	3338.9
China	2549.1	3275.0	4602.8	3252.2	5729.5	4891.7	5480.4	6838.7	4631.2
Japan	6473.0	5832.1	5507.6	5786.2	8549.2	7201.3	5844.9	6822.0	6338.3
Russia	3061.1	2251.3	3066.7	2594.0	2690.1	2844.1	2484.2	2602.1	2700.0
USA	37219.0	28349.6	39712.1	29734.5	45347.2	36012.3	35315.3	28825.5	36662.7
Extra-EU	32364.3	16365.3	31194.9	12380.0	27125.6	12268.9	23833.5	15258.7	-
Intra-EU	101550.7	90213.9	91445.7	90792.1	96867.2	109536.5	98123.5	70889.6	-
Total	200772.0	159749.8	195238.0	155460.1	201232.4	186146.3	189777.5	146404.4	63206.3



2. TABLE OLIVES – 2019/20 CAMPAIGN

Table olive trade during the 2019/20 season (September 2019 - August 2020) in the markets indicated in the table below shows a 6% increase in Brazil. On the other hand, purchases of table olives show a decrease of 1% in Canada, 13% in Australia and 15% in the United States, compared to the same period last year. EU table olive trade during the 2019/20 campaign (September 2019 - August 2020) decreased by 3%, while extra-EU imports remained stable compared to the same period of the previous campaign.

TABLE OLIVE IMPORTS (T)										
Country	NOV 18	NOV 19	DEC 18	DEC 19	JAN 19	JAN 20	FEB 19	FEB 20	MAR 19	MAR 20
Australia	1894.3	2446.6	2363.8	3130.2	2208.2	1488.0	1233.8	1164.9	1848.5	1313.1
Brazil	12807.1	13466.6	9626.1	11834.1	7349.8	9248.7	9384.3	9559.4	8535.6	9705.8
Canada	2848.2	2863.4	2403.5	3192.4	2326.4	2594.0	2112.2	2050.4	2695.6	3172.0
USA	13040.2	13593.2	11242.6	11738.4	12164.6	10062.5	9854.0	9311.0	15965.2	12787.5
Extra-EU	9501.1	9282.0	8713.5	9596.4	10517.6	9440.1	9519.6	8643.9	11044.0	12928.9
Intra-EU	34606.4	33707.0	29204.6	28889.4	23680.6	25657.6	25012.7	25211.3	27382.2	31488.1
Total	74800.5	74518.7	62423.2	66565.9	57466.9	58491.0	57116.4	55940.8	67471.2	71395.5

TABLE OLIVE IMPORTS (T)										
Country	APR 19	APR 20	MAY 19	MAY 20	JUN 19	JUN 20	JUL 19	JUL 20	AUG 19	AUG 20
Australia	1590.2	1189.3	1556.4	1272.0	1191.9	1448.6	1949.8	1507.1	1396.5	1484.2
Brazil	10371.6	8022.8	9465.4	8040.0	7874.0	9629.6	10907.8	10512.5	9896.5	12911.9
Canada	3071.6	2659.9	2993.9	3267.6	2625.2	2542.3	2850.0	2511.3	3073.5	2055.7
USA	16395.3	11315.2	14787.7	11190.6	16081.7	10680.7	18172.0	10251.1	22107.2	16017.9
Extra-EU	12024.3	11161.6	19875.5	9479.6	8362.4	8996.9	10226.5	10526.8	7198.6	8524.2
Intra-EU	29124.2	21986.9	30823.2	23753.9	30453.3	28500.3	34003.2	31924.3	26848.1	24297.1
Total	72577.2	55317.7	71221.3	57003.7	66588.6	61798.5	78109.3	67233.1	70520.1	65291.1

According to the new International Agreement on Olive Oil and Table Olives of 2015, which entered into force on 1 January 2017, the "table olive season" means the twelve-month period from 1 September of one year to 31 August of the following year.



II. PRODUCER PRICES – OLIVE OILS

The evolution of the monthly prices of extra virgin olive oil and refined olive oil is presented in graphs 1 and 2.

Extra virgin olive oil - The producer price of this category in Spain during the week of 16-22 November 2020 was 2.39 €/kg, an increase of 15.5% compared to the same period of the previous year.

Italy - The producer price was 4.8 €/kg during the week of 16-22 November, an increase of 39.7% compared to the same period last year.

Greece - Extra virgin olive oil traded at 2.28 €/kg during the week of 16-22 November, a decrease of 5.2% compared to the same period last year.

Tunisia - The price of this category stabilised during the last weeks of June 2018 at 3.43 €/kg, a drop of 18% compared to the same period of the previous year.

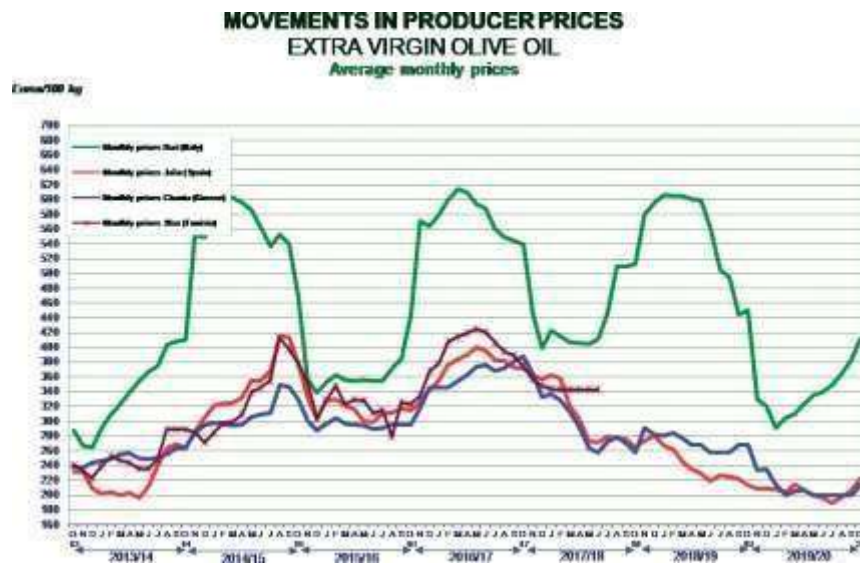


Figure 1



Refined olive oil - the producer price was 1.98 €/kg in Spain during the week of 16-22 November 2020, which supposes a drop of 2.4% compared to the same period of the previous campaign. Data in this category for Italy is not available since the end of December 2017, when the oil was trading at 3.56 €/kg, an increase of 4%.

The difference between the price of extra virgin olive oil (2.39 €/kg) and the price of refined olive oil (1.98 €/kg) is 0.41 €/kg in Spain. In Italy, this difference was 0.43 €/kg in December 2017

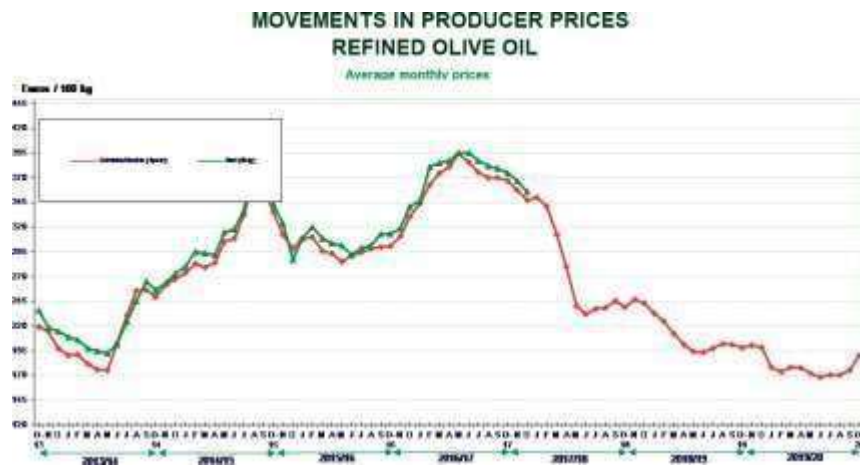


Figure 2



IOC


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A photograph of the IOC Headquarters building, a modern multi-story structure with a grid of windows, partially obscured by a large, stylized olive tree graphic.

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